

Two lenses, One industry.

What organizers see.

What exhibitors feel.

Where the value gap is quietly costing revenue.



FOUNDED IN 2015

JOE: 25+ YEARS MEASURING EXHIBITS & EVENTS GLOBALLY

1,900+ EVENTS AND EXHIBITS MEASURED

1,000,000+ ATTENDEE AND EXHIBITOR SURVEYS COMPLETED

50+ ATTENDEE, EXHIBITOR, SPONSOR & SESSION BENCHMARKS

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JOE FEDERBUSH



EVOLIO_MARKETING



EXHIBIT AND EVENT STRATEGY, INTELLIGENCE & MEASUREMENT

CORPORATE EVENTS

GLOBAL LARGEST INDUSTRY EVENTS

NICHE INDUSTRY EVENTS

SMALL INDUSTRY EVENTS

GLOBAL SPORTS AND ESPORTS

EVENT INDUSTRY EVENTS

MAJOR BRANDS, EXHIBITORS, SPONSORS

ALL MAJOR INDUSTRIES AND GEOS

B2B AND CONSUMER MEASUREMENT

intel

servicenow

SONY

Lenovo

DELL Technologies

SIEMENS
Healthineers

Lilly

Canon
CANON MEDICAL SYSTEMS USA

novo nordisk

Pfizer

HENRY SCHEIN®

HONDA ACURA

designs for health

Miller

Kubota

BOEING

Panasonic

dreamforce
25

intel
VISION

intel
Innovation

Kubota
CONNECT

Gartner
Gartner Digital Workplace Summit

twitch
con

SXSW
SYDNEY

CES

NRF2023
RETAIL'S BIG SHOW

NCBA

RSNA

FABTECH

Gartner
IT SYMPOSIUM | Xpo.

NEW YORK
INTERNATIONAL
AUTO SHOW

HIMSS

AAGR

THE CAR WASH
SHOW

black hat

CCW
CUSTOMER
CONTACT
WEEK

ESMO

MWC
Barcelona

KubeCon

AMERICAN SOCIETY OF
HISTOLOGY

NIGHT
& BAR
bar & restaurant
expo

ACMSIGGRAPH

SABCS
2022 SAN ANTONIO
RELAT CANCER SYMPOSIUM

OLYMPIC RINGS

web
summit

Lippman
Connects

HCEA
HEALTH CARE & EDUCATION

imex
america

EXHIBITOR LIVE

EMS
EXPERIMENTAL MARKETING SUMMIT

CEMA

IAA
MOBILITY

Feelings Aren't Facts[®]

EVOLIO
marketing



What we'll cover.

01

The Exhibit & Sponsorship Sales Strategy Study

Momentum, outlook, and what's really behind the growth.

02

The Value & Cost Gap

Where organizers and exhibitors see it very differently.

03

Demand & the Sales Engine

What's selling, and how teams are equipped to sell it.

04

Pressure & the Path Forward

The real threats, and a playbook to act on them.

EVENT INDUSTRY SURVEY

Exhibit & Sponsorship Sales Strategy Survey

Sales Performance

Pricing & ROI

Compensation

Capabilities & Gaps

RESEARCH CONDUCTED BY



Trade Show Executive

► TAKE THE SURVEY

8-10 min · Anonymous · Get the report free

Results shared live at the Lippman Connects ESR · June 25, Chicago

SETTING THE STAGE · WHO RESPONDED

Who answered

Data collection: May 16, 2026 – June 30, 2026

Online survey. Email invitation. LinkedIn posts.

Currently: 123 completed surveys

Margin of error: ± 8.8 (95% confidence level)



Who answered: **mainly senior, large-show organizers.**

118

Organizer leaders surveyed

June 2026 (preliminary)

49%

VP-level and above

14% are C-suite

73%

Association / nonprofit
organizers

64%

Run events over
125,000 sq ft

19.2

Avg. years in the industry

61% have 20+ years

31%

Top sector: Medical /
Healthcare

Tech 22% · Industrial 21%

Base: Organizer respondents, 2026 ESR Survey, n = 118.

SECTION 01 · THE STATE OF THE INDUSTRY

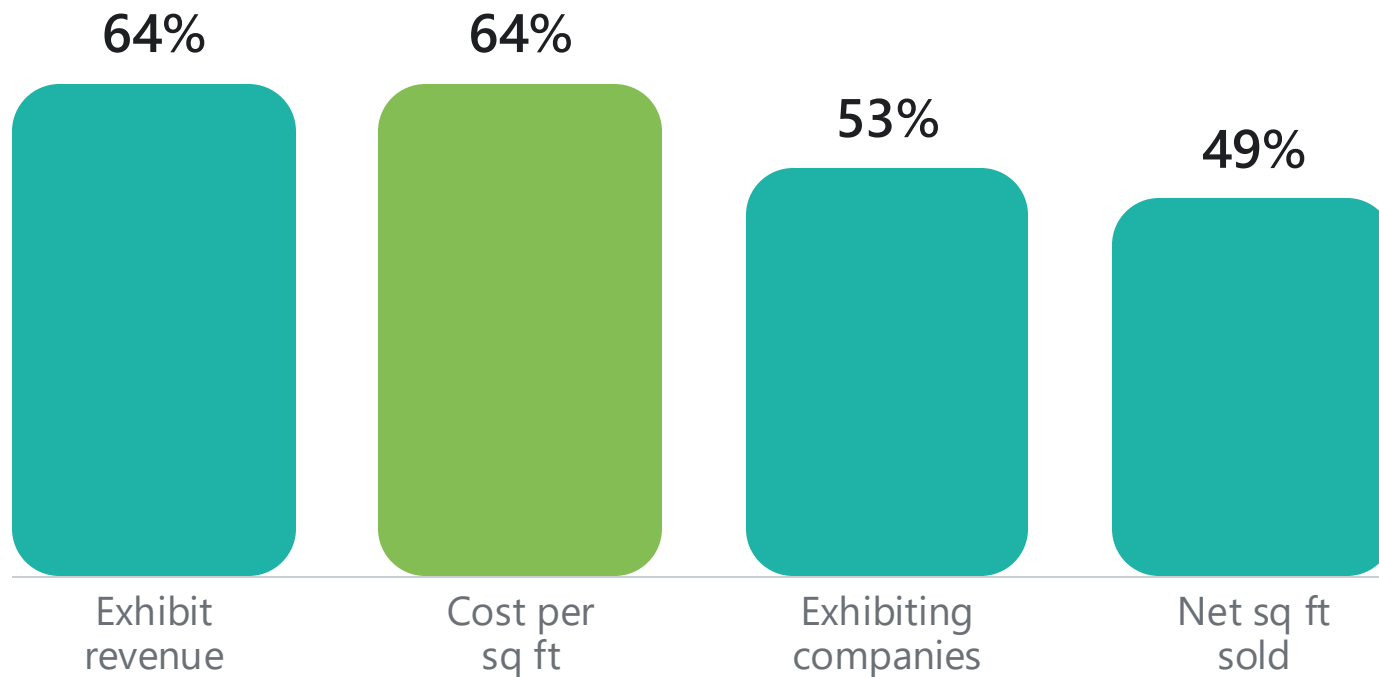
Momentum is real. But how durable?

Where the growth comes from, and whether it lasts.

01

Revenue is rising **faster than space.**

% of organizers reporting an INCREASE vs. last event



THE INSIGHT

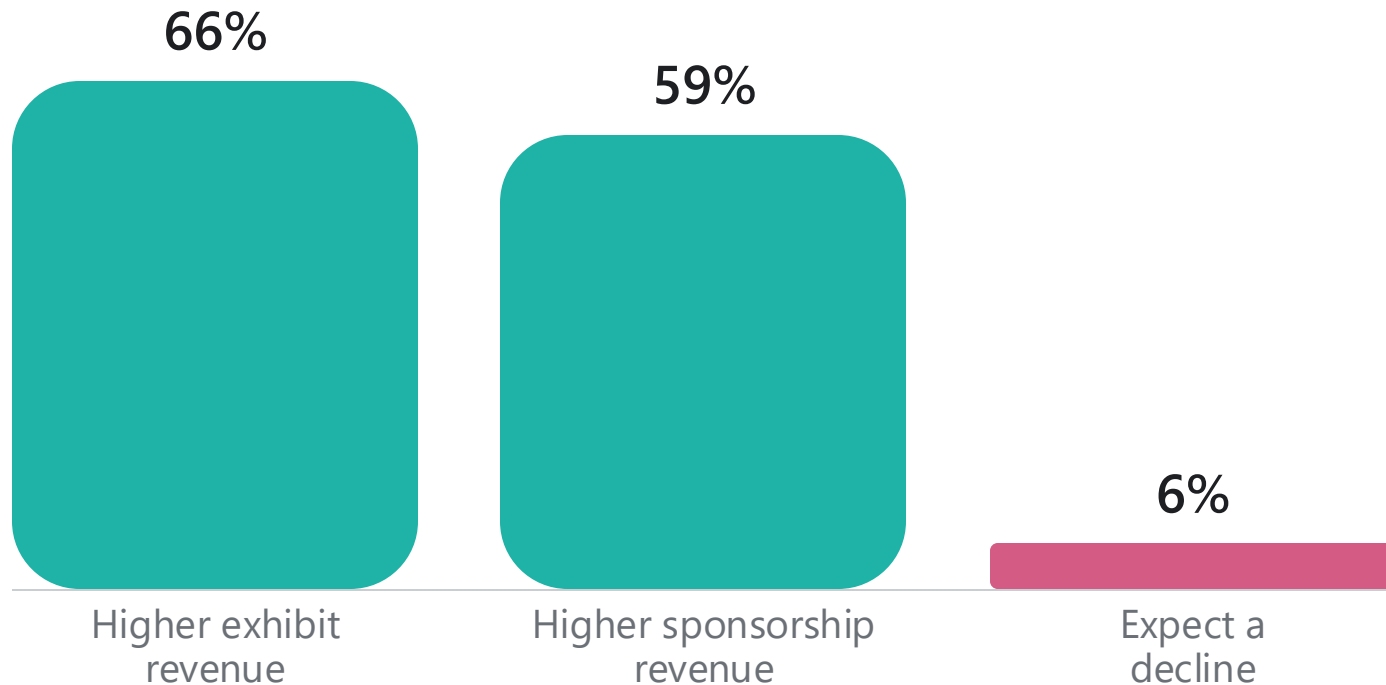
+64%

cost per sq ft increased, **but only 49% sold more net square feet.** Much of the "growth" is price, not expansion.

Base: Organizers n = 118

Most expect **another year of growth.**

Organizer revenue expectations for next year



n = 118.

EXTERNAL VIEW · CEIR

+2.1%

CEIR's 2026 Index forecasts industry growth with healthy forward bookings, independently corroborating organizer optimism.

CEIR/IAEE + Tourism Economics, 2026 CEIR Index, May 2026

SECTION 02 · THE VALUE & COST GAP

Proven on one side,
felt on the other.

02

Where the two lenses agree — and where they don't.

Organizers claim value. Exhibitors don't agree.

ORGANIZERS

79%

are confident they clearly demonstrate event value to exhibitors and sponsors.

▲ Below the 80% strategic-risk line

EXHIBITORS

~50%

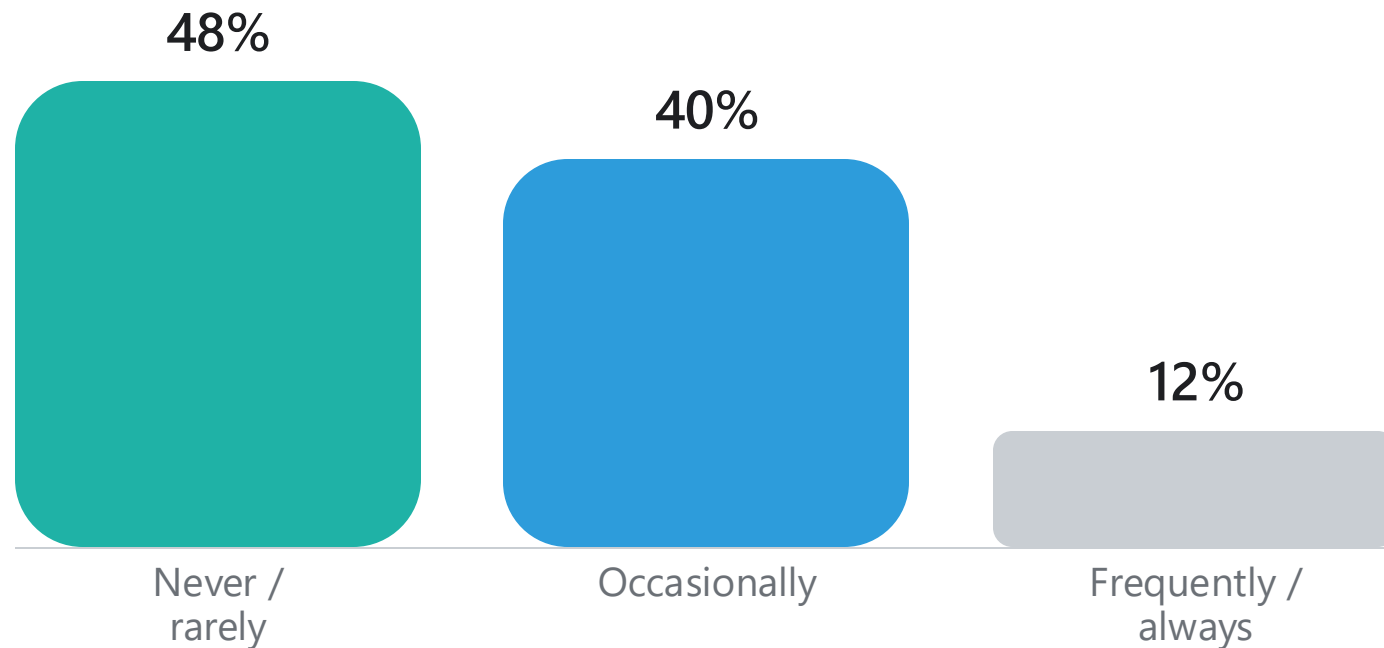
believe rising costs now outweigh the value of exhibiting. Only 55% feel organizers align with their objectives

Freeman (May 2026): across ~20,000 non-attendees, non-attendance is a **value decision**, "not disinterested, unconvinced."

Bases: Organizers $n = 118$; exhibitors $n = 100$ (2026), $n = 241$ (2025, comparable items, directional). | Freeman Trends Report, "What's Keeping People Away," May 2026.

Pricing holds. But pushback is the norm.

“Is your pricing negotiable?”



THE INSIGHT

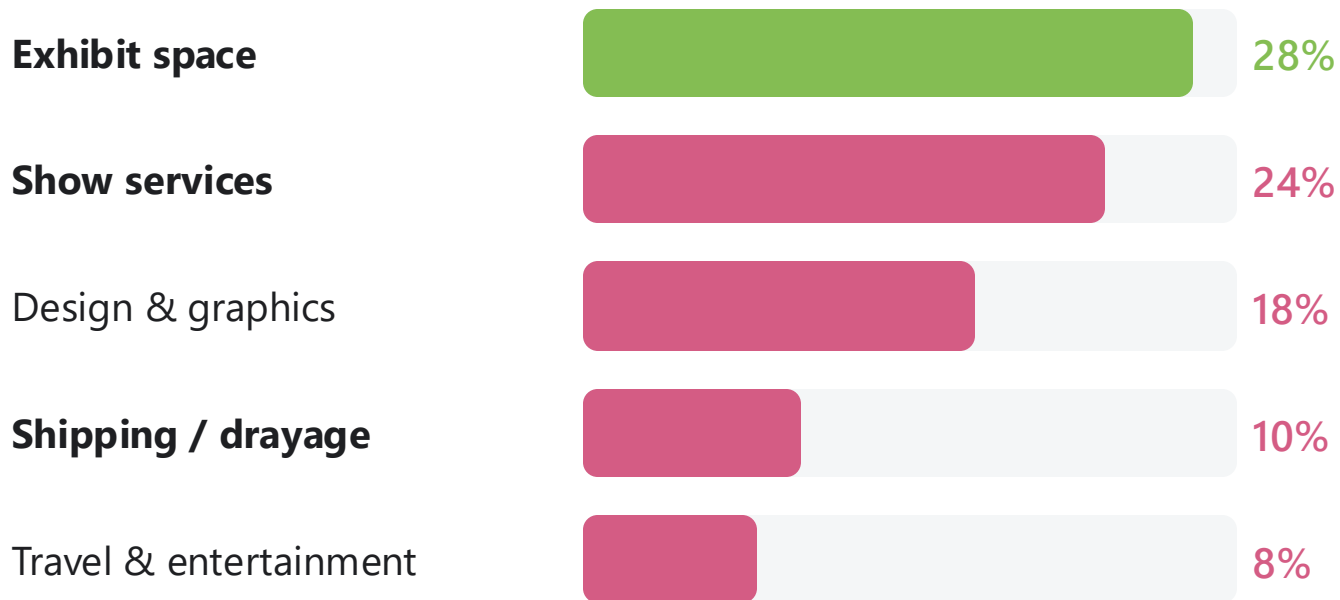
70%

of organizers say buyers push back on price because they question value, at least sometimes. Yet only 12% discount frequently.

Base: Organizers n = 118

62% of exhibitors' budgets cover costs. Not direct opportunities.

Where the exhibitor budget goes



Base: Organizers, n = 118

EXHIBITOR VIEW

62%

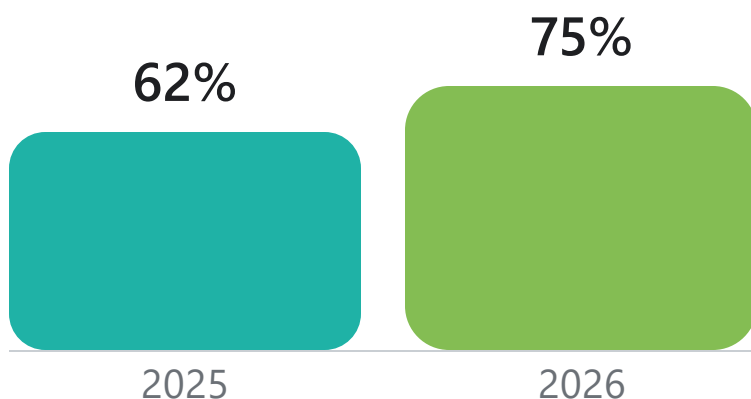
of the exhibitor budget goes to non-revenue, non-promotional costs — services, drayage, shipping.

Costs & budgeting is their #1 challenge (80%).

Base: Exhibitors n = 100 · Feb 2026

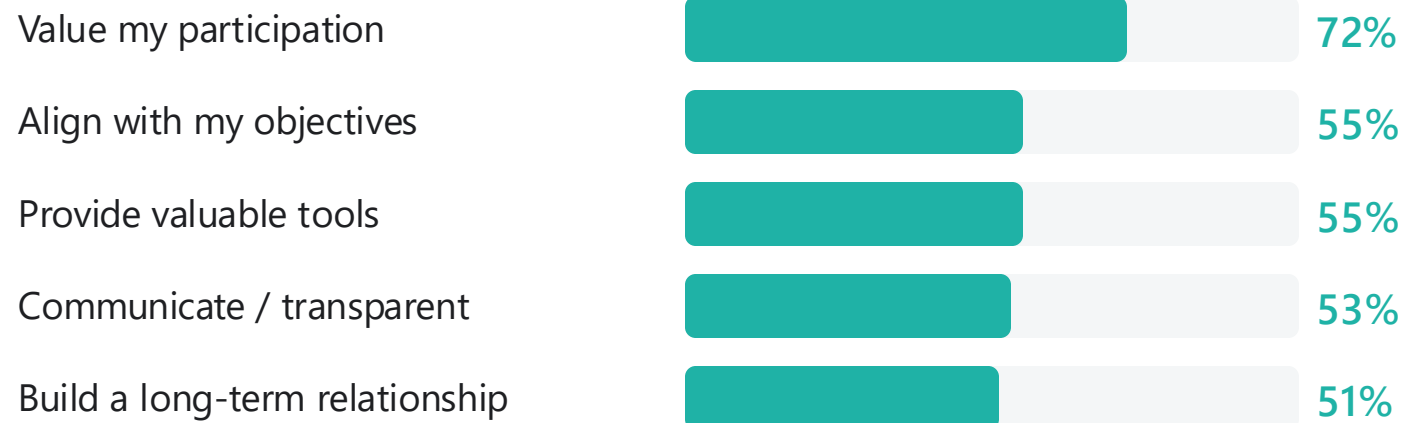
Exhibitors still value events, but with major concerns.

Exhibitors:
Rate event program value
"excellent / good"



However, sentiment towards
organizers...

(% strongly agree/agree)



Bases: Exhibitors n = 100 (2026), n = 241 (2025, directional). CEIR 2026 Marketing Spend Decision Report, May 2026.

43% of exhibitors would rather host their own offsite event than exhibit.

Only ~half feel organizers truly partner.

CEIR: exhibitions remain the **#1 marketing channel (~41%)**

CEIR: Exhibitor NPS recovered -6 (2021) → +35 (2025)

SECTION 03 · DEMAND & THE SALES ENGINE

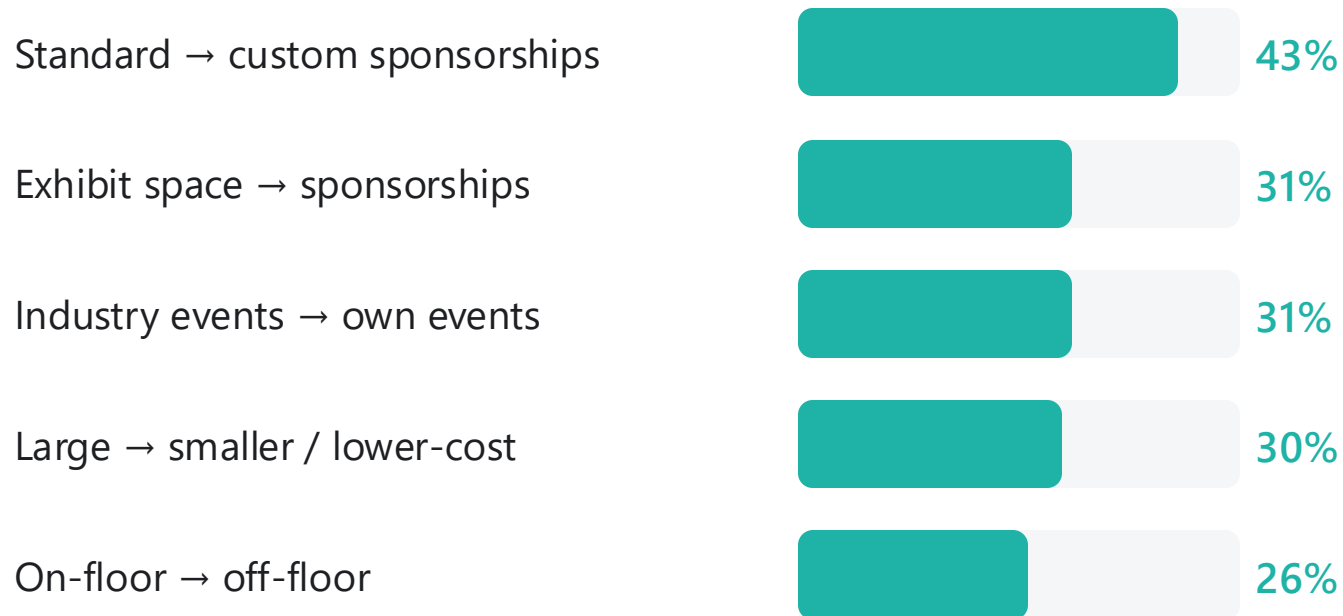
What's selling — and who sells it.

03

Where dollars are moving, and how teams are equipped.

Money is moving to custom and content.

Where organizers see dollars shifting



EXHIBITOR INSIGHT

79%

name thought leadership /
speaking as the #1
sponsorship in demand.
Content, exclusivity and
custom now lead the ask.

Base: Exhibitors, n = 118

Sponsors want custom. Can you deliver it profitably?

87%

ask for custom sponsorships
at least sometimes

78%

can deliver custom profitably

▲ below the 80% line

-9 pts

demand-to-capacity gap

Base: Organizers, n = 118. "Can deliver profitably" = somewhat + very well (top-2-box).

Demand for tailored opportunities outruns the ability to deliver them profitably.

Productize “custom” sponsorships into repeatable, priced tiers.

Can you price “thought leadership” to its 79% demand.

Strong on value. Soft on prospecting.

Capability	T2B: Success	Mean	Read
Communicate value	82%	4.1	Strong
Sell to objectives	74%	3.9	Build
Recommend right mix	72%	3.9	Build
Defend pricing	70%	3.8	Build
Grow existing accounts	68%	3.8	Build
Convert new prospects	68%	3.7	Build
Use data in the sale	61%	3.7	Coach
Find new prospects	59%	3.5	Coach

Messaging is strong

82% can communicate value. The one capability above the 80% line.

Prospecting lags

Finding new prospects (59%) and using data (61%) are the soft spots.

Selling consultatively must improve

Only 15% sell mostly consultatively, though that's the stated goal.

Base: Organizers n = 116 (confidence items). T2B = top-2-box (4 successful + 5 very successful ratings); mean on a 5-point scale.

Widely used $\neq$ Most effective.

Channel	% Use	Most effective	Read
Email	98%	38%	Workhorse
In-person	81%	22%	High value
Phone	78%	21%	Volume
Inbound leads	76%	10%	Volume
Referrals	58%	4%	Underused
LinkedIn	58%	2%	Low yield
AI prospecting	28%	2%	Emerging

Email does the work

Used by 98% and the single most-effective channel, but only by 38%

In-person and Phone

Time and volume are required to achieve positive results.

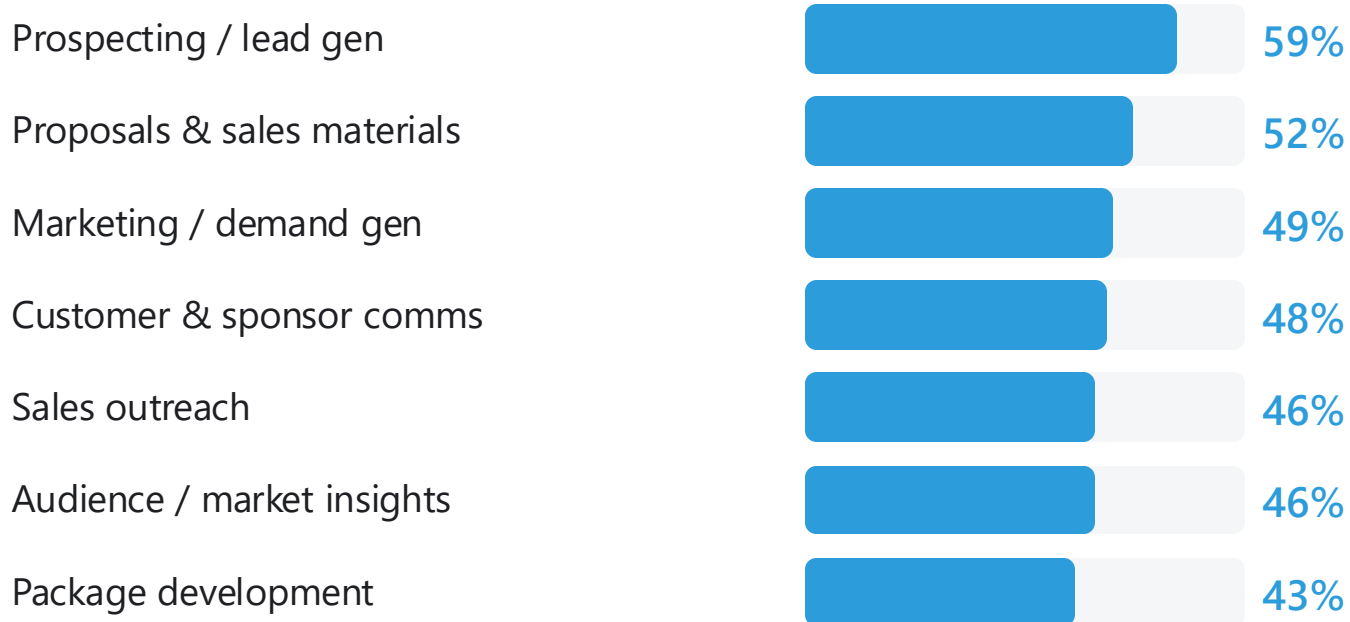
Effort > payoff

LinkedIn and inbound reach the majority, but together only 12% call them most effective.

Bases: Organizer sales channels used (multi-select) $n = 118$; single most-effective channel $n = 115$. "

AI is everywhere — but still early.

How organizers use AI today



USAGE & IMPACT

76%

are using AI.
53% for under a year. only
1.7% call AI their most-effective
channel: today it assists in the
funnel, but it doesn't outperform
the rep.

Bases: Organizer AI users n = 90

AI tenure: 24% don't use · 24% < 6 mo · 30% 6–12 mo · 19% 1–2 yrs · 4% > 2 yrs

SECTION 04 · PRESSURE & THE PATH FORWARD

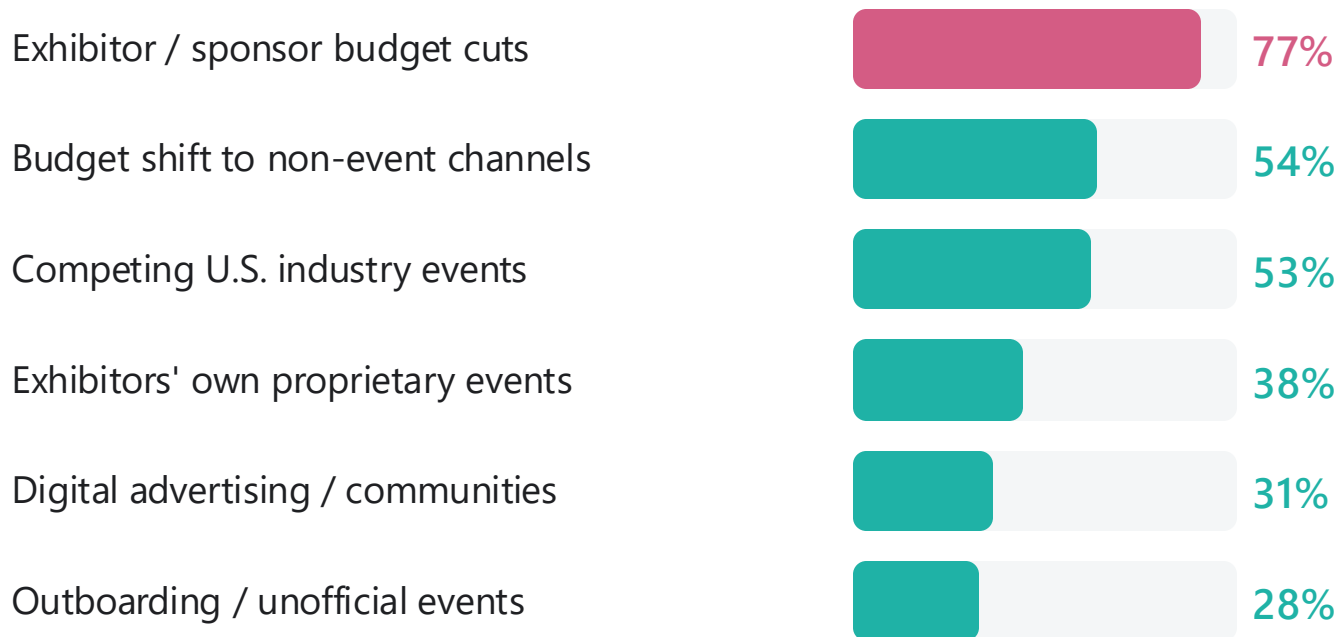
The real threat
isn't a rival show.

04

What's pressuring the business — and how to respond.

Budgets, not rival events, are the direct threat.

Pressure felt by organizers (significant + moderate)



THE INSIGHT

37%

feel budget cuts as "significant" highest-intensity pressure, dwarfing rival shows.

Shift from policing outboarding to partnering.

Base: Organizer n = 118

Where organizers & exhibitors agree. Where they don't.

✓ WHERE BOTH PARTIES AGREE

The channel still matters

Organizers expect growth; 75% of exhibitors rate value excellent/good; CEIR ranks it #1.

Content is king

Thought leadership is the #1 sponsorship ask (79%) and a top reason exhibitors attend.

Custom over standard

Both sides are moving from packages to tailored, outcome-based opportunities.

Cost is the pressure point

Organizers' #1 pressure is budget cuts; exhibitors' #1 challenge is cost.

✗ WHERE THEY DO NOT

Value: proven vs. felt

79% of organizers are confident they prove value; only ~half of exhibitors feel it.

Price vs. cost

Organizers hold/raise price (cost/sq ft +64%); exhibitors say 62% of spend is non-revenue.

'No major shift' vs. offsite

15% of organizers see no major shift; 43% of exhibitors would rather host offsite.

Relationship gap

Organizers feel they partner; ~half of exhibitors don't feel aligned or valued long-term.



IN THEIR WORDS

Two POVs.

"Shift from selling features to selling outcomes like meetings, leads, and ROI benchmarks."

— Organizer verbatim · 2026 ESR

"Once the space is sold, it feels like we no longer matter. Stop charging us for every little thing."

— Exhibitor verbatim · 2025 VOE

LET'S DISCUSS

Four questions for you...

- 1 Is your growth actual expansion, or because of price? How exposed are you if budgets tighten?
- 2 Whose job is it to prove exhibitor ROI, and what one proof point would change renewals?
- 3 What moves "prove-the-value" confidence, and exhibitor alignment , above 80%?
- 4 How do you turn cost centers (services, drayage, outboarding) into value exhibitors want to pay for?

CASE STUDY

Prospecting using AI.
Killer prompt example.

CASE STUDY: AI PROMPTING FOR PROSPECTING

Role & Objective

Act as the world's best exhibit and sponsorship sales professional, with 20+ years representing the National Cattlemen's Beef Association (NCBA) for CATTLECON. Goal: grow paid exhibit space 20% within 6 months (Feb 2027 show, Nashville), then a further 20% for 2028. Nashville is a top-selling market; the show rotates annually among San Antonio, Houston, Nashville, and Orlando. NCBA is the industry leader and our approach is consultative, so fit and audience alignment matter as much as volume.

Tasks (use the attached exhibitor prospectus and sponsor list)

- 1. TAM: size the total addressable market of US-based company types that fit our target profile.
- 2. Baseline: analyze current exhibitors and sponsors to characterize who participates today.
- 3. Targets: identify 20 NEW companies not on the current/recent exhibitor or sponsor list. Cross-check against the attached list and fact-check each. Research each company's ideal customer profile (ICP) and how it maps to our attendee demographics. Rank all 20 with a 1-10 fit score and an A/B/C tier, and assign a recommended booth size or sponsorship tier plus a rough budget range for each.

Process (two passes) First, present the TAM and your recommended target categories/strategy and pause for my sign-off. Only after I approve, generate the full list of 20 companies.

Output a single table, one row per company, with columns: Fit Score (1-10), Tier (A/B/C), Company, Location, URL, Exhibit Manager, CMO, Other events they exhibit/sponsor at, Recent trigger events (funding, new product, new CMO, expansion, etc.), Why they fit CATTLECON, Recommended package & budget range, Estimated target-audience size at CATTLECON, Source/citation, Confidence (High/Med/Low). Do NOT fabricate names, emails, or numbers — leave the cell blank and flag it. Cite a source for each company. Before you begin, ask me the 3 most important clarifying questions you need to do this well.

CASE STUDY: AI PROMPTING FOR PROSPECTING

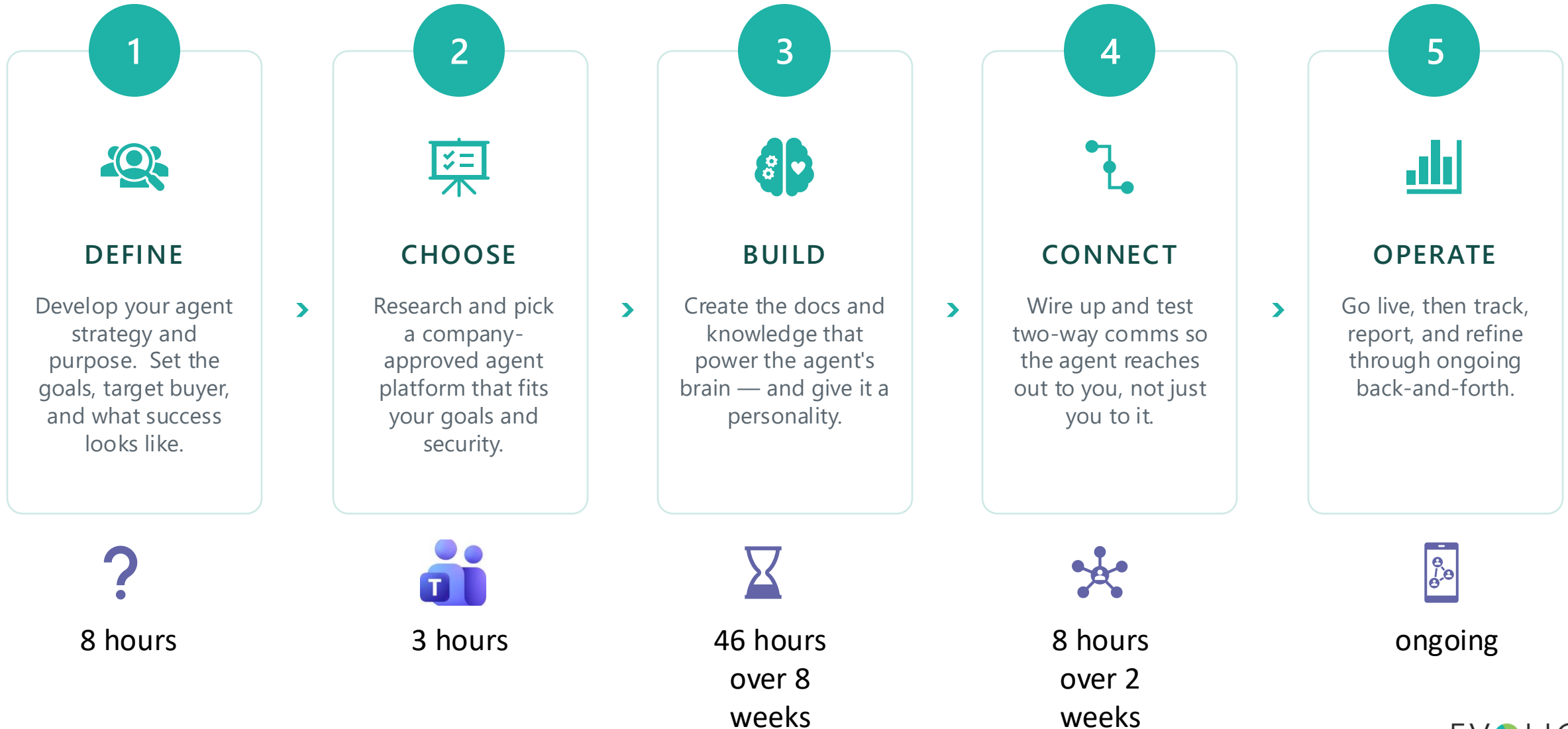
NCBA CATTLECON - 20 New Exhibitor / Sponsor Targets												
Enterprise national brands NOT on the 2025 San Antonio booth-draw list and with no verified current CattleCon engagement. Cross-checked vs the provided exhibitor list. Built for CattleCon 2027 (Nashville, Feb 2-4, 2027) + 2028 pipeline. *Audience figures are DIRECTIONAL - see 'Audience Sizing' tab. Contact fields left blank where not verified in public sources.												
#	Priority Tier	Company	Category	HQ Location	Website	Parent / Notes	ICP (Who They Sell To)	Other Events They Exhibit / Sponsor	CattleCon Presence (verified)	Play Type	Why Fit for CATTLECON	Est. Aud CAT
1	Tier 1	Tractor Supply Company	Rural lifestyle retail	Brentwood, TN	tractorsupply.com	NASDAQ: TSCO; 2,200+ stores	Rural lifestyle consumers, hobby & commercial farmers/ranchers, livestock & pet owners	Presenting Sponsor, Wrangler National Finals Rodeo (2026, PRCA); year-round PRCA rodeo presence	No public evidence at CattleCon (Western presence is NFR/PRCA)	Whitespace	Largest rural retailer in the US, HQ in the Nashville metro (local 2027 angle). Sells exactly what attendees buy. Heavy experiential spend on rodeo proves it values this audience; absent from the trade-show floor.	
2	Tier 1	RAM Trucks (Stellantis)	Trucks / Vehicles	Auburn Hills, MI	ramtrucks.com	Parent: Stellantis N.V. (Amsterdam)	Truck buyers incl. ranchers and Western-lifestyle customers (Ram HD work trucks)	Ram Rodeo Series (500+ rodeos/yr; PRCA, NIRA, NHSRA, NLBRA); title sponsor RAM National Circuit Finals Rodeo; Wrangler NFR 'Official Truck'	No public evidence at CattleCon (footprint is rodeo/PRCA)	Whitespace / Competitive	Deepest rodeo footprint of any truck OEM but not on the floor. No truck OEM exhibits at CattleCon today = open category. Ranchers are core HD-truck buyers.	
3	Tier 1	Ford Motor Company	Trucks / Vehicles	Dearborn, MI	ford.com / pro.ford.com	NYSE: F	Truck, commercial-fleet and ag buyers (Super Duty, Ford Pro work trucks)	Houston Livestock Show & Rodeo Heritage Partner (2024-2028); former PBR Premier Series title sponsor	No public evidence at CattleCon (presence is RodeoHouston)	Whitespace / Competitive	Best-selling truck brand in the US with a fleet/ag arm (Ford Pro). Already invests in livestock-show/rodeo audiences; CattleCon is an untapped national rancher floor.	
4	Tier 1	Polaris Inc.	Powersports / UTV	Medina, MN	polaris.com	NYSE: PII	Farmers, ranchers, hunters, landowners, commercial fleets (RANGER UTV)	World Ag Expo (exhibitor, demo track + vehicle giveaway); Ag/Business Fleet rebate program	No public evidence at CattleCon (verify)	Competitive (share-shift vs Can-Am, present 2025)	Markets RANGER as the #1 choice for farmers/ranchers. Direct competitor Can-Am exhibits; clean share-shift play in a category attendees actively buy.	~5%
5	Tier 1	YETI Holdings	Premium outdoor / lifestyle	Austin, TX	yeti.com	NYSE: YETI	Outdoor & premium-lifestyle consumers (hunting, fishing, ranch/rodeo, BBQ)	PBR official cooler/drinkware partner; founding partner PBR Austin	No public evidence at CattleCon (Western presence is PBR/PRCA)	Whitespace	Built its brand on ranch/rodeo culture and ambassadors but isn't on the floor. High-margin consumer brand that	

CASE STUDY

BUILDING A SALES AGENT

CASE STUDY: BUILDING A SALES AGENT

From idea to a working, revenue-driving sales agent in five steps.



CASE STUDY: BUILDING A SALES AGENT

WEEKDAYS 6:00 AM

Good morning Joe. Here's your Chief of Staff operating brief.

Today's calendar:

Now answer these:

- 1. What are your top 3 priorities today?
- 2. What sales follow-ups are at risk?
- 3. What proposal, deck, or client deadlines need attention?
- 4. What should you avoid wasting time on today?
- 5. What is the first action you need to take?

Joe, get busy. starting with what's most important and quickest to do.

Reminder: Revenue follow-up beats formatting.

FRIDAYS 2:00 AM

Joe, before we close the week, answer honestly.

WINS

- 1. What were your three biggest accomplishments this week?
- 2. What generated the most business value?
- 3. What moved EVOLIO forward strategically?

EXECUTION

- 4. What important commitments were not completed?
- 5. Why were they not completed?
- 6. What follow-ups are still outstanding?
- 7. Which unfinished item creates the most revenue risk?

FOCUS

- 8. Where did you lose focus this week?
- 9. Did you spend too much time on:
 - formatting
 - polishing
 - administrative work
 - low-value tasks
- 10. What should have been delegated, automated, or eliminated?

NEXT WEEK

FRIDAYS 4:00 AM

Weekly Accountability Review

Before ending the week, answer honestly:

- 1. What were your three biggest accomplishments?
- 2. What important work did **not** get completed?
- 3. Why did it not get completed?
- 4. What caused the biggest distraction this week?
- 5. What follow-ups are still outstanding?
- 6. What should be delegated, automated, or eliminated?
- 7. What is the most important outcome that must happen next week?
- 8. Did you spend enough time on strategic growth?
- 9. Did you spend too much time on low-value work?
- 10. What would your Chief of Staff tell you to do differently next week?

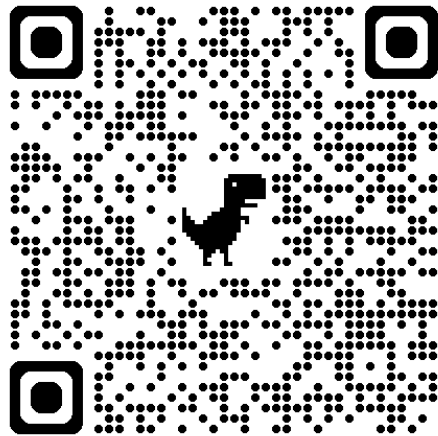
Joe, a few important reminders:

- ** The goal is progress, not perfection.
- ** Unfinished revenue-generating work is rarely a scheduling problem.
- ** It is usually a prioritization problem and less likely a time problem.

APPENDIX

EXHIBITOR SENTIMENT STUDY

DOWNLOAD THE FULL REPORT AND WATCH THE WEBINAR



The Uncomfortable Truth: What Exhibitors Really Think (and Why It Matters)

February 5, 2026



The Evolving Landscape of Event Marketing

*From the Perspective of Exhibit and
Event Marketers*

January 2026



Thank you.

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