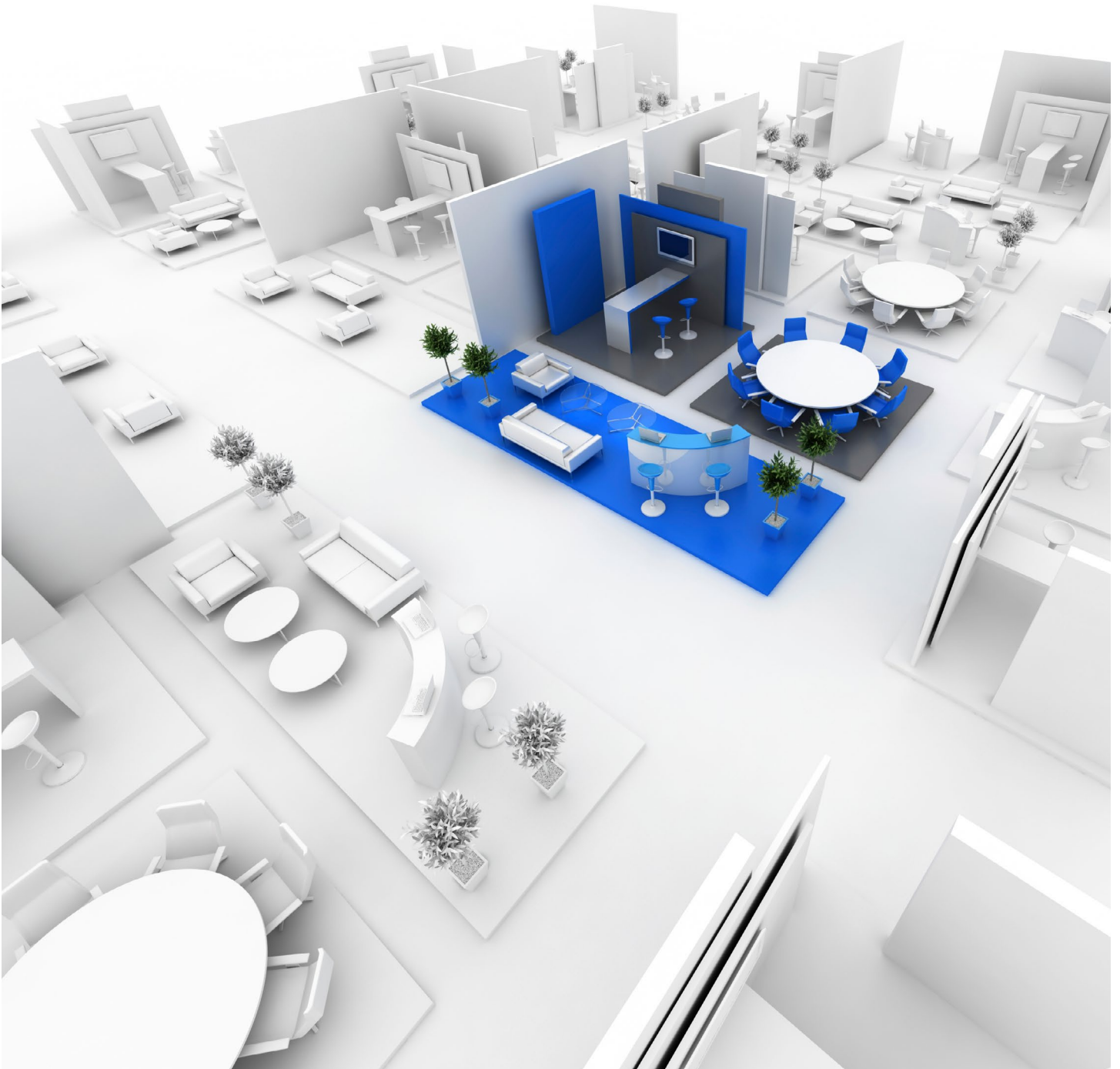
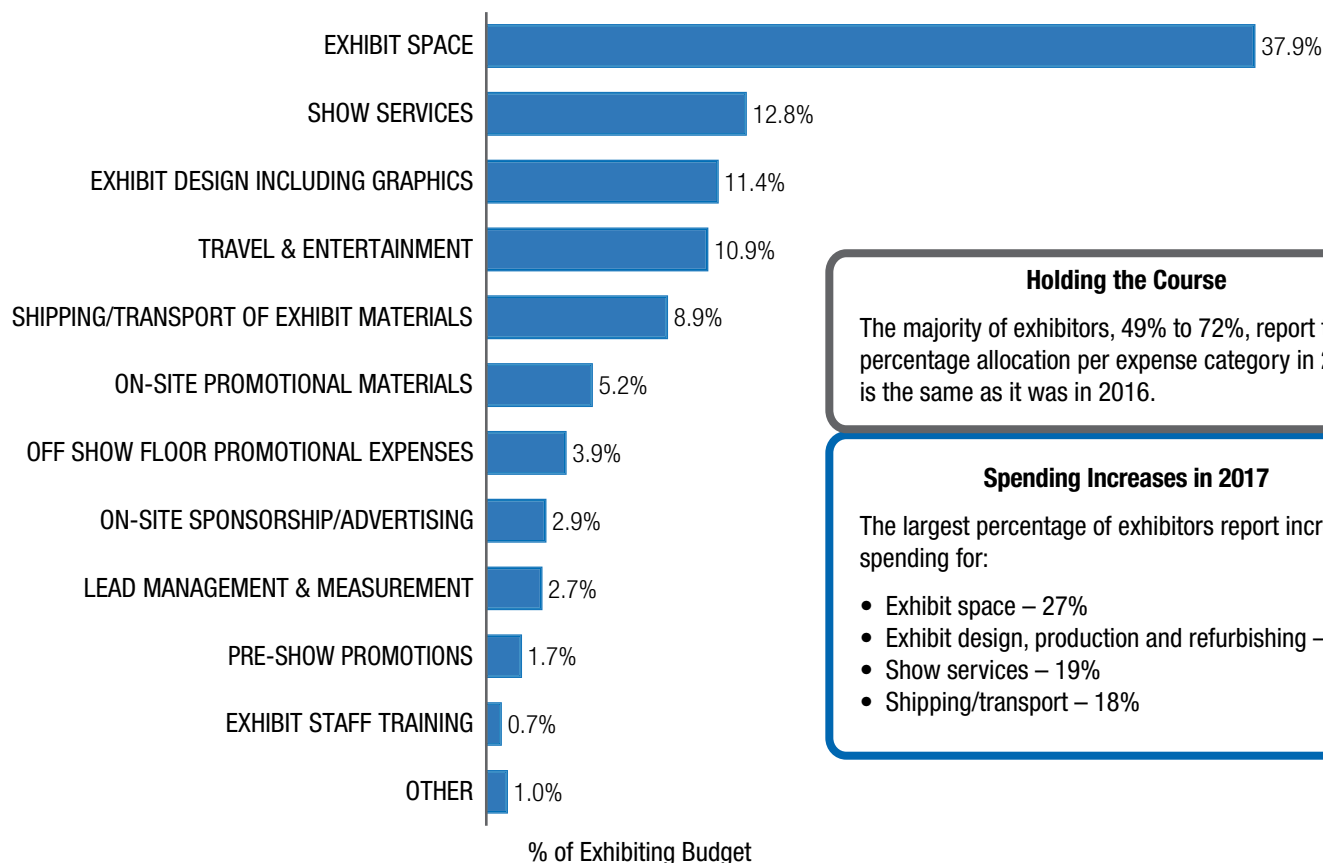


2017 How the Exhibit Dollar is Spent



Exhibiting companies will spend an estimated \$25 billion¹ in 2017 on exhibiting! **How is this money spent? This report tells you how.** It includes the percentage breakdown of spending by expense categories and identifies the direction of spending levels in 2017 versus 2016. It explains how spending varies by the size of an organization's annual marketing budget and revenues, booth size, and industry sector. It also looks forward, reporting exhibit property plans for 2018.

How the Exhibit Dollar is Spent in 2017



Holding the Course

The majority of exhibitors, 49% to 72%, report the percentage allocation per expense category in 2017 is the same as it was in 2016.

Spending Increases in 2017

The largest percentage of exhibitors report increased spending for:

- Exhibit space – 27%
- Exhibit design, production and refurbishing – 24%
- Show services – 19%
- Shipping/transport – 18%

Projected Total Exhibitor Direct Spending in 2017: \$25,300,000,000¹

Show services include material handling, installation and dismantling, electrical, furnishings, Internet, AV, floral, food and beverage, cleaning service, etc.

On-site promotional materials include giveaways, brochures, etc.

On-site sponsorship/advertising includes show lanyards, reception sponsorships, directory ads, etc.

Off show floor promotional expenses includes offsite receptions, client dinners, etc.

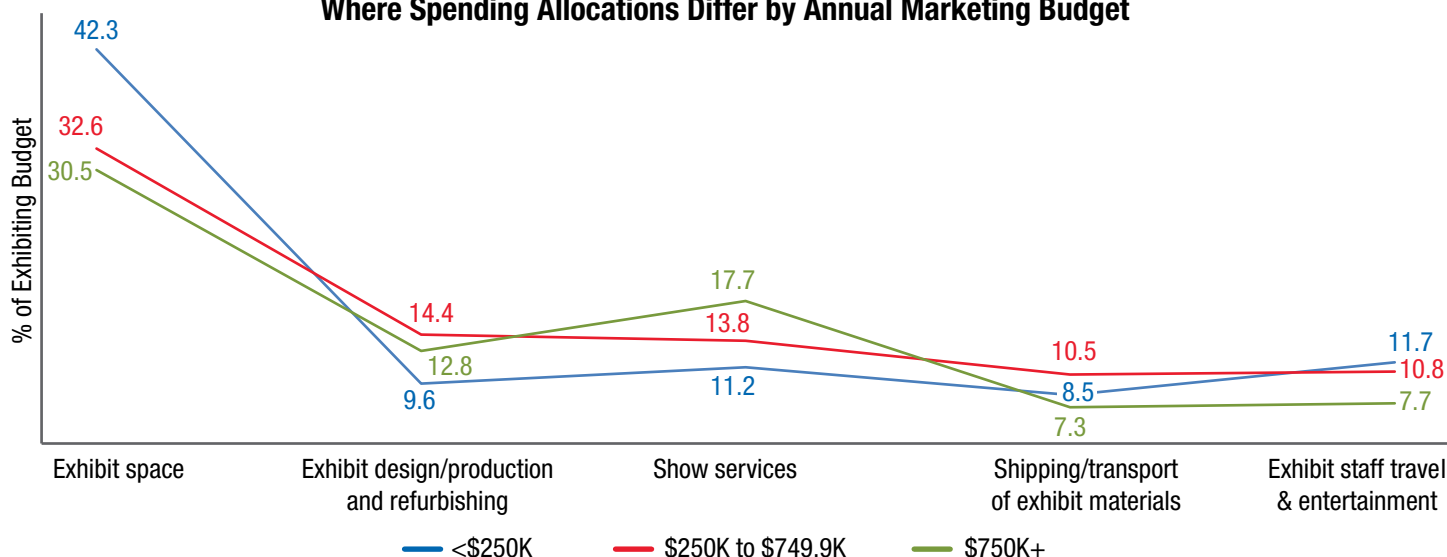
Lead management & measurement includes lead retrieval equipment, post-event follow-up and tracking, etc.

Methodology: Percentage allocations are based on results of an online survey completed in the summer of 2017. A sample of business-to-business exhibitors from lists provided by Freeman, GES, Fern Expositions, Hargrove and Shepard Exposition Services were invited to participate in the online survey. A total of 424 exhibitors responded.

¹The projected exhibitor direct spend estimate for 2017 is an update of the exhibitor direct spend estimate for 2014 and uses data from the CEIR Index for the first two quarters of 2017. This report covers results for the 2017 study. The 2014 edition of this report is available online for download [here](#).

Spending Analysis by Annual Marketing Budget and Annual Revenue

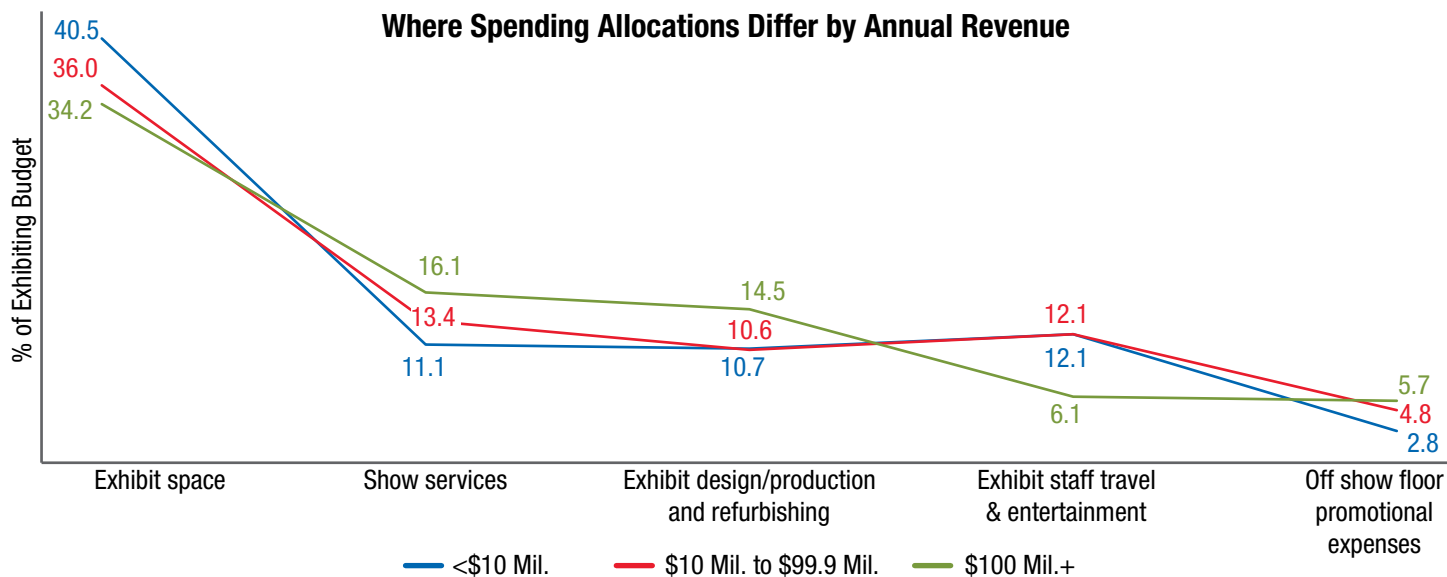
Where Spending Allocations Differ by Annual Marketing Budget



Marketing budgets drive spending levels. Those with the smallest budgets allocate the largest share of their budget to base-level expenditures – exhibit space and T&E (travel and entertainment) costs for exhibit booth staff.

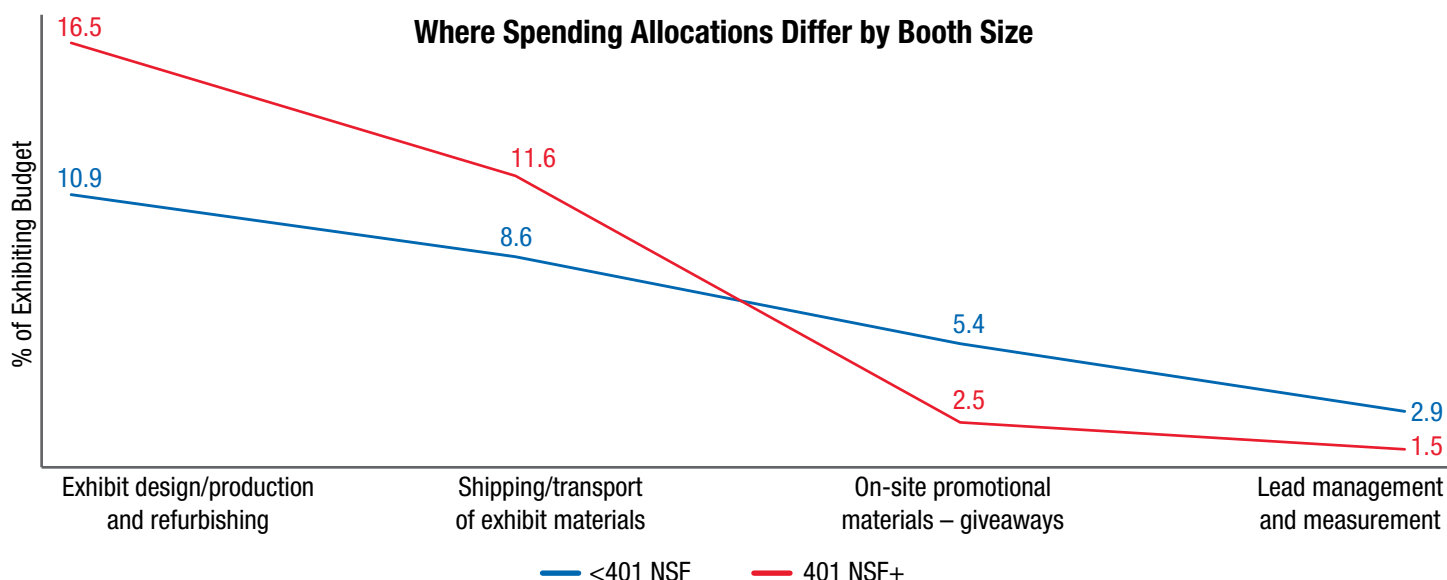
When looking at other differences found in budget allocations, mid-sized budgets allocate more for all listed expense categories except for show services, where exhibitors with the largest marketing budgets allocate more.

Where Spending Allocations Differ by Annual Revenue



Differences in spending allocations by annual revenues indicate a positive relationship between budget allocations for all expense categories besides exhibit space and booth staff T&E. The larger the annual revenues, the more is allocated to these other expenses.

Spending Analysis by Booth Size



Exhibitors with larger booths allocate more of their budgets to exhibit design costs and shipping costs, while those with smaller budgets allocate slightly more for giveaways and lead management equipment and services.

Spending Analysis by Industry Sector

DIFFERENCES IN EXHIBIT SPENDING ALLOCATIONS BY INDUSTRY SECTOR							
	Exhibitors in General	Business Services	Consumer Goods/ Retail Trade	Building/ Construction/ Home and Repair	Industrial/ Heavy Machinery and Finished Business Inputs	Communications/ IT	Medical/ Health Care
Exhibit space	37.9%	35.3%	45.6%		36.9%	35.0%	
Exhibit design/production and refurbishing	11.4%			9.4%		14.2%	
Show services	12.8%		8.7%		14.5%	14.2%	
On-site promotional materials	5.2%	6.2%			2.9%	4.3%	6.7%
On-site sponsorship/advertising	2.9%	5.0%	1.2%				

Green shading signifies higher percentage allocation while red shading signifies a lower percentage allocation.

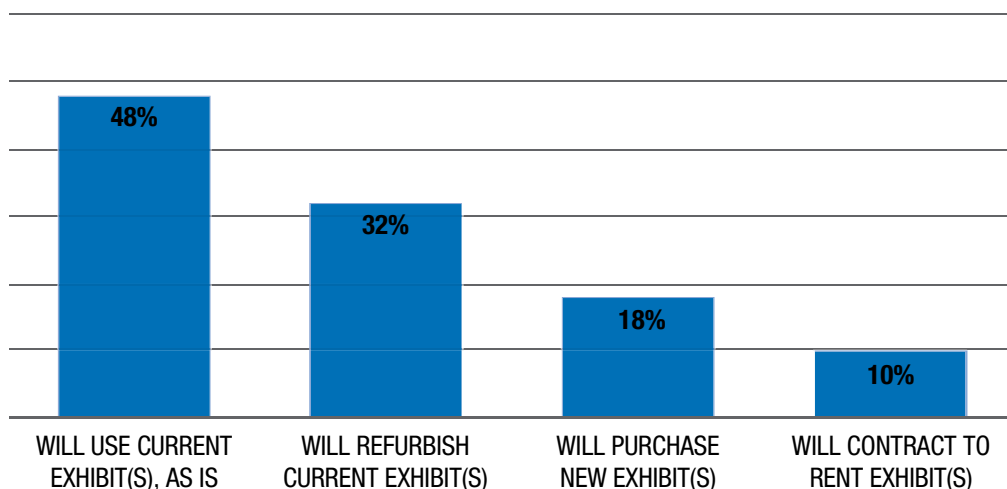
The table above summarizes differences in exhibit budget allocations among six of CEIR’s industry sectors.² Red cells identify sectors that allocate less than exhibitors in general while green shaded cells identify higher spending allocations. The primary differences are that Consumer Goods/Retail Trade exhibitors allocate the highest percentage of their budgets to exhibit space and the least to show sponsorships and on-site sponsorships or advertising.

Other differences found are slightly higher or lower than percentage allocations recorded for exhibitors in general.

²Other CEIR Index sectors excluded are due to insufficient sample, fewer than 28 respondents. These sectors include: Education; Government; Discretionary Consumer Goods and Services; Financial, Legal and Real Estate; Raw Materials and Science; Sporting Goods, Travel and Amusement; and Transportation.

Exhibit Property Plans for 2018

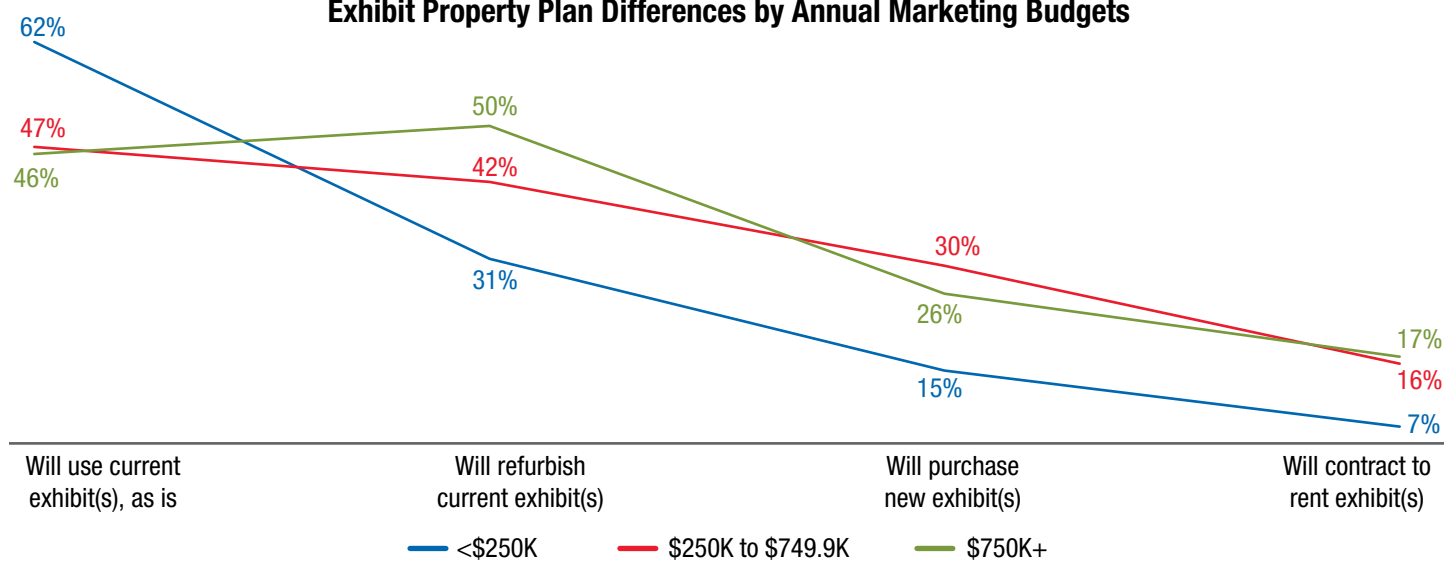
Exhibit Property Plans for 2018



Booth Size Influences Plans to Rent
 20% of those with space of 401 NSF or larger plan to rent a booth compared to 9% of those with smaller space.

The majority of exhibitors plan to use their current exhibits for 2018, though a substantial minority, 32%, will invest in refurbishment of their exhibits, and 18% will make new purchases.

Exhibit Property Plan Differences by Annual Marketing Budgets



The larger share of exhibitors with the smallest budgets plan to use their existing exhibits; while more exhibitors with larger budgets have plans for booth refurbishments or completely new exhibits. More exhibitors with the largest marketing budgets plan to refurbish their booths while slightly more exhibitors with mid-range marketing budgets plan to invest in entirely new booths.

DIFFERENCES IN EXHIBITOR PROPERTY PLANS BY SECTOR

	Exhibitors in General	Business Services	Consumer Goods/ Retail Trade	Building/ Construction/ Home and Repair	Industrial/ Heavy Machinery and Finished Business Inputs	Communications/ IT	Medical/ Health Care
Will use current exhibit(s) as is	48.0%					40.0%	62.0%
Will contract to rent exhibit(s)	10.0%	4.0%	5.0%	3.0%	16.0%	30.0%	4.0%

Green shading signifies higher percentage allocation while red shading signifies a lower percentage allocation.

Sector differences are summarized above. Nearly two-thirds of Medical and Health Care exhibitors will use the same exhibits while considerably fewer Communications and IT exhibitors plan to do so. There is a higher rate of intent to rent among Communications and IT exhibitors and those in the Industrial/Heavy Machinery and Finished Business Inputs sector; while fewer exhibitors in other listed sectors have such plans.

The *How the Exhibit Dollar is Spent* report is published through the combined efforts of:

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