

AUMA KNOWLEDGE

# Study

The Added Value of Trade Fair Visits:  
How Individual Trips Are Avoided

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# Foreword



Foreword by Jörn Holtmeier,  
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Mobility is crucial for a sound social and economic coexistence. Only when people come together a growing understanding, deeper perception, and opportunities for new collaborations can be gained. Business trips are of great importance for global economics: they add to trust-building between partners, they are essential for maintaining business relationships and opening new markets. And they are instruments for promoting the exchange of knowledge and experience with customers, universities, research institutions and other partners. Business trips are indispensable, especially in the German SME sector, with its global market leaders who have a strong international network. New business opportunities and innovation are created through personal exchange and co-operation.

What exactly do trade fairs contribute to facilitating efficient business travel? This was the study's topic. Together with Professor Dr. Harald Zeiss, Head of the Institute for Sustainable Tourism at Harz University of Applied Sciences, the Association of the German Trade Fair Industry AUMA investigated in the first half of 2024 how trade fair visitors of leading international trade fairs in Germany for their business activities. How many professional discussions, meetings and negotiations do trade fair visitors perform in one day? As trade platform and industry meeting place, do trade fairs allow for the combination of several occasions and activities? Does this lead to more targeted travelling, making additional trips unnecessary?

This study analyses the survey of almost 3,000 trade fair participants – one of the most comprehensive surveys in recent years. The results emphasise the high added value of trade fair visits, as they are planned in a very efficient manner. A wide range of business activities is bundled around trade fair dates. By visiting trade fairs single trips are being avoided. However, potential remains to support visitors and exhibiting companies in their trade fair planning and ecological travel logistics. For us, these are important findings for our industry's goal of creating offers for low-emission or emission-neutral travel to and from our events, as stipulated in our industry positioning on sustainability.

## STUDY BACKGROUND

# Executive Summary

Germany is the number 1 trade fair location in the world. More than 70 exhibition centres between the North Sea and Lake Constance organise an average of 330 trade fairs per year. This density makes Germany unique as a trade fair centre. Trade fairs in Germany are also unique in terms of their high-level internationality: in 2023 alone, almost two thirds of exhibiting companies and one third of trade visitors came from abroad. These events play a crucial role in business exchange – they are the leading trade fairs of the global economy. From the very beginning, trade fairs as central trading centres have been realised through on-site participation, which makes a business trip necessary. An innovative economy would be difficult to imagine without today's mobility. At the same time, companies are paying more and more attention to ensuring that business trips are as reasonable, efficient and sustainable as possible.

166 of the 320 trade fairs in Germany, representing more than half, qualified as international or national trade fairs in 2023. Around a third of visitors came from abroad. The majority of foreign visitors came from Europe; 55 per cent from the European Union and 19 per cent from other European countries. Roughly a quarter of visitors to domestic trade fairs travelled from outside Europe, primarily from South-East-Central Asia (11.3 percent) and North America (4 percent).<sup>1</sup> Germany is a very international trade fair location in terms of exhibitors, too, with 65 percent of exhibitors coming from abroad in 2023.<sup>2</sup>

Business travellers make important business contacts at trade fairs, which are essential for a company's activities. This is confirmed by the 2024 business travel analysis by the German Travel Management Association (VDR). Companies are currently sending fewer employees on tour, but business trips are extended. There is a clear trend towards 'trips lasting several days, favoured by the bundling of events'.<sup>3</sup>

Against this multi-faceted background, this study analyses the efficiency and sustainability of trade fair visits in connection with changing sustainability and mobility requirements. It aims to determine the average number of business contacts per trade fair visitor and examine to what extent digital alternatives could have generated similar contacts.

The results are based on 2,912 extensive personal interviews between January and April 2024. The interviews were conducted at nine international trade fairs at nine exhibition centres of different sizes in Germany.

<sup>1</sup>AUMA 2024

<sup>2</sup>AUMA 2024

<sup>3</sup>VDR Business Travel Report 2024, p.5

## Key findings

One of the study's key findings is the high level of efficiency in the planning and realisation of business contacts by trade fair visitors. The respondents had an **average of 13.1 business contacts**<sup>4</sup> per day, and over a third of these contacts would have led to additional trips if they had not visited the trade fair.

This means that an **average of 5.1 separate trips were avoided** per visitor per day. The range extends from 3 to 13.8 avoided trips depending on the trade fair, which illustrates the differences between various events. The results for business contacts made are similar. Here, too, there are major differences between the trade fairs analysed. The number varies greatly and ranges from 10.1 to 29.2 per day.

When it comes to opening new markets and gaining new business contacts, the international level of Germany as a trade fair centre is the key to success for small and medium-sized companies in particular. International visitors have 17.8 business contacts per day, compared to only 10.8 when it comes to domestic visitors. The proportion of contacts that would have led to additional trips is 40.1 per cent (7.9 avoided trips) for international visitors, compared to 33.0 per cent (3.8 avoided trips) for domestic visitors.

**Airline passengers** have more contacts (17.6) and avoid more trips (7.7) than **car drivers** (12.3 contacts, 4.7 avoided trips). This underlines the fact that air travellers in particular plan their trade fair visits efficiently and therefore make the most of the potential for CO2 savings. Visitors from South and Central America (11.6) and the Middle East (11.3) avoid the most extra journeys on average when visiting trade fairs, which emphasises the global reach and efficiency of trade fairs.

**Concerning the nature of discussions, informal meetings with potentials (42.2 per cent) and networking (40.0 per cent) are in first place**, followed by product advice (36.1 per cent) and contract negotiations (20.3 per cent). The study results show a higher number of sales meetings among foreign visitors than among domestic visitors (31.9 per cent/12.4 per cent), emphasising the importance of trade fairs for international business deals.

The examination of the potential to digitalise business contacts is another important aspect of the study. According to the participants, **61 per cent of business contacts could not have taken place in the same quality digitally**. Networking (65.7 per cent) and informal meetings with potentials (62.7 per cent) are least suitable for digital formats. This underlines the high value of personal encounters at trade fairs. Media-/press- talks and trainings are most likely to have digitalisation potential.

<sup>4</sup> Business contacts were defined in the questionnaire as professional or business discussions and meetings, both planned and spontaneous, which take place at the trade fair.

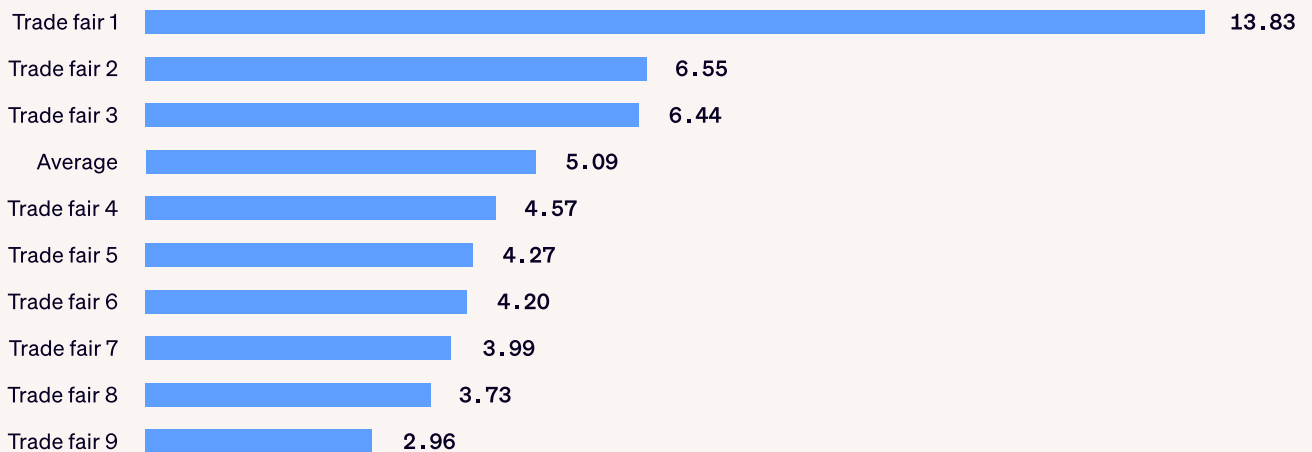
The study also sheds light on the scheduling and travelling habits of trade fair visitors. **45 per cent of those surveyed are planning additional appointments in connection with their trade fair visit** in order to increase the efficiency of their trip. Well over a quarter of visitors (28 per cent) combine their trade fair visit with additional business appointments and a further 17 per cent connect their trade fair visit to a private stay. A significant proportion of trade fair visitors therefore combine their business trip with additional appointments. This has to be taken into consideration when determining the CO2 footprint caused by travelling to the trade fair venue.

The majority of respondents, **56 per cent, state that they personally pay attention to ecological factors when planning trade fairs and trips (e.g. means of transport, accommodation)**. At company level, as many as 60 per cent take ecological aspects into account when planning trade fairs. This shows a clear awareness of sustainability in the trade fair sector.

In summary, the study shows that trade fairs contribute to the reduction of individual trips by bundling numerous business and private meetings in one place. The results also show differences between domestic and international visitors and provide information on the digitalisation potential of various meeting formats. Many business contacts at trade fairs cannot prosper digitally in the same quality, which underlines the importance of face-to-face meetings for business success. The results of the study also provide important insights into ecological awareness in the trade fair sector on both the visitor and company side.

## AUMA-STUDY „THE ADDED VALUE OF TRADE FAIR VISITS“

### Business Trips Avoided per Trade Fair Visit per Day



**Figure 1:** AUMA, visitor survey at nine selected trade fairs, January-April 2024, n=2,912. The survey was conducted using standardized questionnaires through personal interviews (CAPI).

## Conclusions

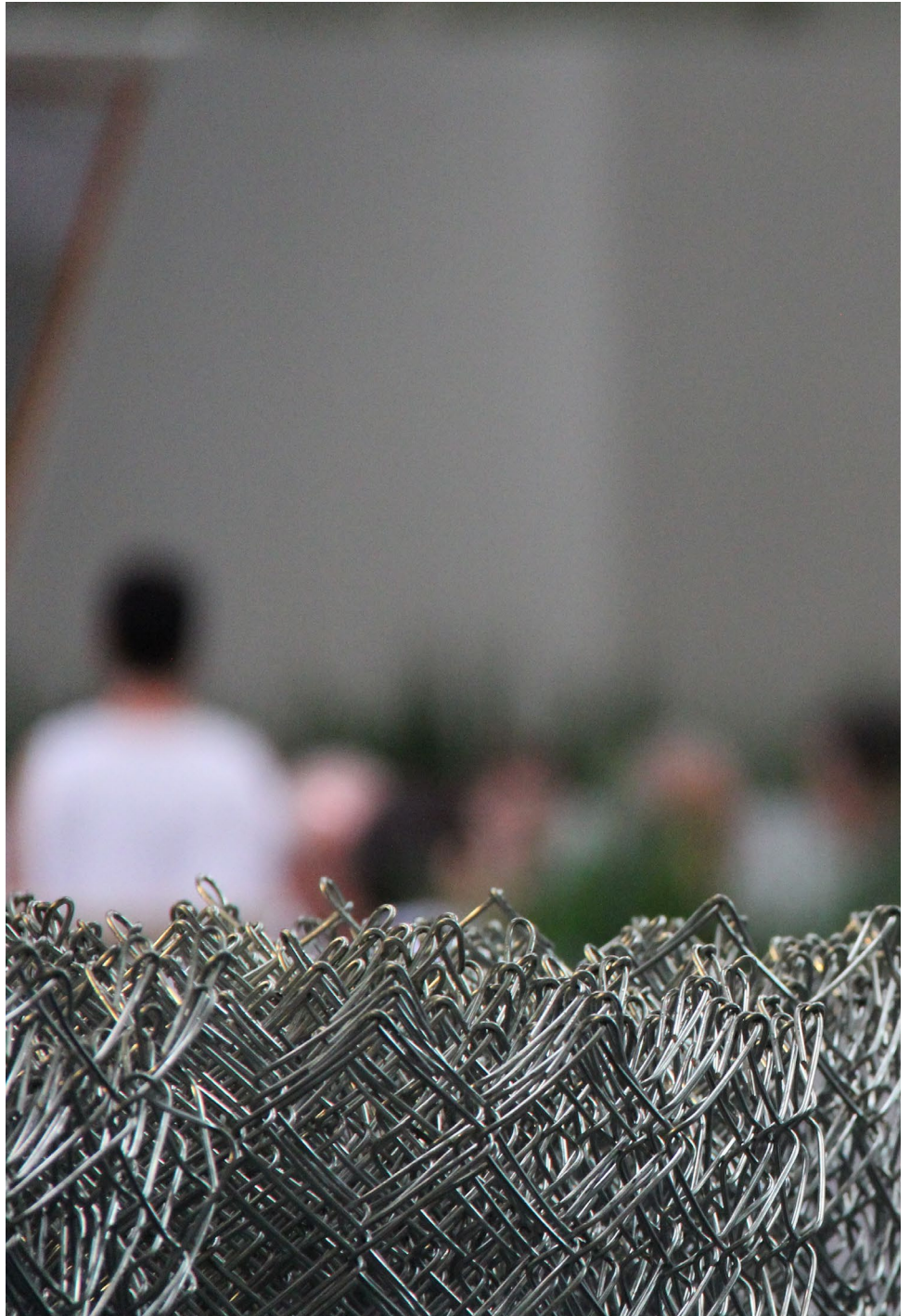
Based on the results, the following conclusions can be drawn for trade fairs

1. trade fairs should enhance and communicate their **part as an efficient international platform for personal business contacts**. Proof of avoided travel is an argument in favour of the sustainability potential of trade fair visits.
2. **international visitors especially benefit from trade fair visits**, because this group makes a particularly large number of contacts and thus avoids additional travelling.
3. **informal networking opportunities** to initiate business should be encouraged, as these contacts are the least digitally replaceable.
4. **digital extensions** complement trade fair visits and can thus further increase the reach of trade fairs.
5. support and **promotion of climate-friendly travel and sustainable accommodation options** should be increased in order to meet the ecological requirements of visitors and companies.

## Outlook

Trade fairs contribute to climate protection and sustainability by efficiently bundling numerous personal contacts, thus avoiding additional individual trips. The location of Germany's trade fair centres in Central Europe also plays an important role here, as it is a particular suitable starting base for follow-up appointments in Europe. Trade fairs in Germany offer ideal opportunities – nationally and internationally – to cover a wide range of business contacts. German trade fairs also have the potential to act as pioneers for sustainable business methods and at the same time maintain their central role in the global economy. This study provides important insights that are relevant for both companies and policy makers to better understand the importance of business travel in the exhibition industry for efficient, sustainable travel.

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AUMA is the Association of the German Trade Fair Industry. Acting both internationally and nationally, it represents the interests of all large and medium-sized exhibition companies in Germany, international event organisers in Germany and the associations that represent exhibitors, service companies and trade fair visitors.

Trade fairs in Germany secure up to 230,000 jobs. With no fewer than 70 exhibition venues between the North Sea and Lake Constance, Germany is truly unique as a trade fair-hosting country. Two thirds of all leading global economy trade fairs take place right here in Germany. At peak times, international, national and regional trade fairs in Germany attract more than 235,000 exhibiting companies and 16 million visitors. On average, 60 per cent of exhibiting companies and 35 per cent of specialist visitors to all leading trade fairs travel from abroad.

## Imprint

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