cognizant®

The exhibition industry transformed

How multi-agent AI is elevating
the pre-show experience

EXECUTIVE SUMMARY

The $46.5 billion[1,2] global exhibition industry has recorded a strong recovery in the wake of the COVID-19 pandemic, with year-on-year growth rates of 20%. However, there is a damaging disconnect between these positive figures and an unmistakable drop in customer satisfaction. Organisers are struggling to deliver what exhibitors (sellers) and attendees (buyers) are demanding: better metrics for demonstrable ROI, deeply personalised experiences and high-quality connections. This white paper explores how the strategic use of AI technology within the crucial pre-show phase overcomes these challenges by elevating the exhibition experience for organisers and customers.

Why focus on the pre-show experience? Because first impressions count. The absence of strong leads, personalised information and effortless onboarding has a negative impact on the main event. To address these friction points, organisers must ensure that the pre-show journey is seamless, engaging and highly informative, setting the scene for success across the exhibition lifecycle.

As spending on technology within the pre-show phase grows strongly, there is a clear appetite for smart digital tools to reshape the customer experience.

Cognizant has the transformative solution: our Neuro® AI Multi-Agent Accelerator, a collaborative network of specialised AI agents which streamline and simplify critical pre-show operations. Strategically applied to intelligent audience acquisition, context-aware engagement, seamless onboarding and actionable data insights before the event, it unlocks substantial and immediate value.

Our focused application drives demonstrably enhanced attendee quality, improved exhibitor preparedness and optimised resource allocation. These directly amplify lead generation efficacy and overall ROI, the core metrics of event success. By focusing on the high-impact preshow phase, our multi-agent solution empowers organisers to overcome their challenges rapidly, whilst establishing a robust foundation for future AI-driven innovation across the entire exhibition lifecycle.

The exhibition ecosystem: a growing global footprint

In today's global marketplace, the exhibition industry represents a $46.5 billion ecosystem engaging 4.4 million companies worldwide[3]. A range of stakeholders connect to add value across the chain – organisers managing the platforms, exhibitors showcasing their products, attendees seeking solutions and various service providers supporting the experience. What makes the industry distinct is its cyclical nature, with pre-show, on-site and post-show phases creating a continuous journey of engagement and value creation.

With year-on-year growth of 20%, the exhibitions sector is a vital cornerstone for B2B marketing and commerce.

An estimated long-term CAGR of 7% by 2032 signals that the industry is moving towards sustained growth, where trade shows command 57% of revenue followed by consumer exhibitions at 35% of revenue[4].

Regionally, Europe leads with 30% of the global market, followed by North America[5]. However, the growth story belongs to Asia Pacific and GCC regions. This pattern reveals a key insight: mature markets experience slower growth due to saturation, while emerging economies are capitalising on economic development and infrastructure investments.

Exhibitions industry continues to rise despite the post pandemic growth in the slow lane

TOTAL ADDRESSABLE MARKET (TAM $$)

The total exhibition market is valued [2023]
$ 46.5B

Year on year growth 2023 v/s 2022
+20%

Eight-year growth
+7%
2024 — 2032

No of companies exhibiting globally
4.4 million [2023]

BY MARKET SEGMENTATION ($$)

Europe reigns as the largest exhibition market

Total market size	**$ 14B**
Total market share	**30%**

Driven by a notable shift toward hybrid exhibition formats blending physical and virtual elements.

BY PRODUCT SEGMENTATION ($$)

B2B exhibitions are paving the way

Market Revenue by Enterprise (2023)

Trade shows segment	**>57%**
Consumer segment	**35%**

■ Large Enterprise ■ SMEs

AI-powered tools are being utilised for tasks such as automating registration, providing personalised recommendations, and facilitating efficient lead generation

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The industry paradox: stakeholder tensions and the experience gap

Despite the impressive numbers and a complex, interconnected network, the exhibition industry faces a critical misalignment between expectations and reality as organisers struggle to demonstrate ROI. Surveys show that 63% of exhibitors are demanding better performance metrics, whilst also registering declining customer NPS scores (-36 points) for the quality of lead generation[6]. Meanwhile, 66% of buyers want a much more personalised pre-show guidance and 37% cite technology as key to strong connections with sellers[7]. Today's stakeholders seek:

• Simplicity in user experience

• Rich data enhancement

• Faster, automated paths to value.

AI features which support a seamless experience and enhance customer satisfaction are no longer luxuries; they have become "must haves". Visionary organisers can bridge the divide with AI-powered solutions which deliver data-driven personalisation and intelligent matchmaking, especially at the critical pre-show stage.

AI embedded solutions are no longer a luxury... they are must haves for customer satisfaction uplift

Yesterday

AI enabled event solutions were seen as delighters

WOW features that could increase satisfaction

TOTAL SATISFACTION

DELIGHTERS

AI enabled onboarding | Predictive insights
Gen AI guided registration / recommendation
Gen AI analytics | AI marketing
AI matchmaking | Gen AI content creation

NEEDS NOT MET ← → NEEDS FULLY MET

DISSATISFIERS

NPS scores are going down
Customers seek **simplicity**
They seek **data enrichment**
They seek faster, **automated time to value**

Today

These features have become MUST HAVEs

due to LOW customer satisfaction

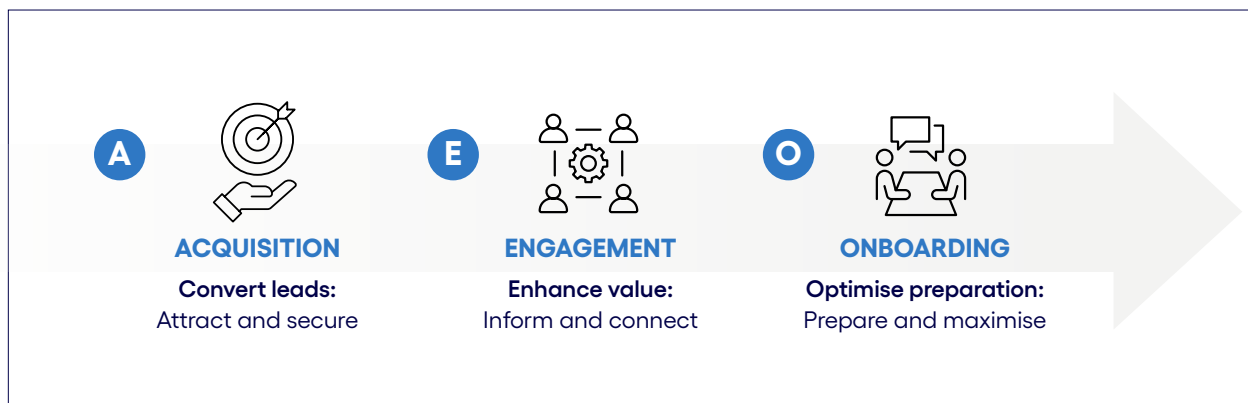TOTAL DISSATISFACTION

An uneven path to AI adoption

However, whilst the exhibition industry is experiencing significant digital transformation, this is not uniform. Despite a 30% growth in AI use, with 45% of event organisers actively deploying AI tools, a substantial adoption gap is emerging between industry leaders and laggards[8].

The major players have the competitive edge. Informa leads the market with $ 4.38B annual revenue and is currently positioned as the AI front runner[9]. RX, Clarion and FT Live follow, each with different approaches to innovation. Their varying competitive strategies highlight a critical market opportunity: those who harness advanced technology earliest are best positioned to capture market share.

Smaller players are struggling to keep pace with AI capabilities, however, and even larger businesses are being held back by siloed systems which create a fragmented customer journey. This inconsistent industry outlook is undermining the quality of the pre-show experience.

The pre-show experience: the vision vs the reality

A **ACQUISITION**
Convert leads:
Attract and secure

E **ENGAGEMENT**
Enhance value:
Inform and connect

O **ONBOARDING**
Optimise preparation:
Prepare and maximise

Event excellence depends upon laying the strategic groundwork, so the pre-show journey is so much more than mere preparation.

It should be the critical lever for maximising value within this dynamic sector, with three distinct phases building the foundations for success for individual events and the exhibition sector as a whole. However, significant problems remain.

Phase 1: Strategic acquisition

The pre-show **acquisition** phase is about strategically attracting high value exhibitors and attendees. This necessitates sophisticated market research to identify key players, crafting compelling narratives through targeted content creation and clearly articulating the unique value proposition of participation. Organisers must also optimise lead conversion pathways to secure early commitments.

However, CRM systems, marketing automation, social advertising and website analytics often operate in silos, hindering organisers' attempts at effective acquisition.

By implementing unified data platforms and sophisticated attribution models, organisers can transform these challenges into actionable insights, target a high-quality audience and maximise acquisition ROI.

Phase 2: Value-driven engagement

Once the right customers are identified, the **engagement** phase focuses on enriching the value proposition for all stakeholders before the event. Personalised communication and promotions highlight the opportunities for individual attendees, leveraging advertising options and Q&A sessions to foster early interaction and build anticipation by showcasing key exhibitors and speakers.

At present, unclear agendas, information overload, generic communication and untimely outreach are hindering effective engagement. Email platforms, event websites/apps, social media, webinars and basic chatbots, while functional, often lack sophistication.

True engagement is delivered by implementing AI-powered personalisation engines, which analyse attendee behaviour and preferences to deliver hyper-relevant content and communication, transforming passive recipients into active participants eager to connect and explore.

Phase 3: Optimised onboarding

The final pre-show phase, **onboarding**, empowers participants to navigate the event and optimise their experience. Organisers should provide crucial pre-show platform/app access, offering comprehensive logistic information and resources specific to the event's infrastructure. Personalised recommendations maximise networking and learning opportunities and facilitate early connections through matchmaking services.

In reality, registration issues, missed updates and logistics confusion are detracting from the experience. The standard "Event Management Platform" email communication, basic networking features and static FAQs often fall short of delivering a truly empowering onboarding experience.

A proactive, user-centric onboarding strategy is paramount. Integrating interactive maps, AI-powered meeting schedulers, personalised content feeds within the event app and even pre-event virtual meetups can significantly reduce anxiety and maximise on-site value.

A strategic pre-show unlocks the full value of the exhibition lifecycle

By focusing on data-driven acquisition, personalised engagement and seamless onboarding, organisers can cultivate a thriving marketplace and drive value for all stakeholders.

There are three high-potential segments:

- **Integrated AI-driven recommendation engines:** A $5.39 billion market opportunity with demonstrated revenue increases of 12%[14] for early adopters Informa through strategic partnerships with technology leaders including Microsoft and Fujitsu[10,11].

- **Audience segmentation and AI lookalike solutions:** The largest potential segment focusing on hyper-personalisation and "segmentation for one" capabilities that deliver precisely targeted experiences.

- **AI-powered matchmaking:** A $9.06 billion opportunity growing at 6.7% CAGR, with proven 44% increases[17] in year-over-year in-person meetings for platforms like Grip and Clarion Events[12,13].

How can organisers embrace these technologies and ensure that they are integrated across the end-to-end customer journey?

The Cognizant Neuro® Multi-Agent Accelerator: transforming the pre-show environment

Introducing our solution: a cognitive network of specialised, autonomous but interconnected AI agents to streamline processes, reduce complexity and enhance the experience for all stakeholders.
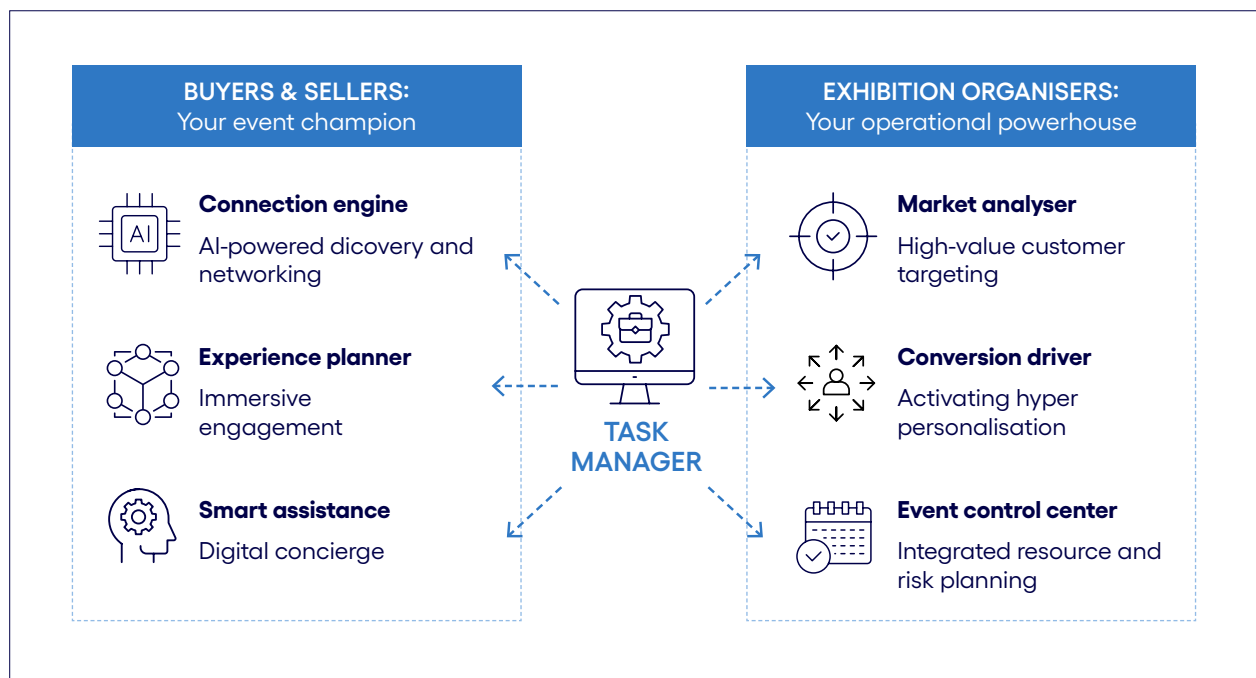
Buyers and sellers: your event champion

Our accelerator empowers buyers and sellers through intelligent tools that proactively anticipate needs, facilitate high-quality connections and drive value from event participation:

1. Connection engine: AI-powered discovery and networking. This agent transcends keyword matching, employing advanced semantic analysis and behavioural profiling to deliver content-rich connection recommendations. Attendees are intelligently steered towards precisely aligned exhibitors and sessions based on deep understanding of their objectives, whilst exhibitors are introduced to leads with a high propensity for conversion.

2. Experience planner: immersive industry engagement. This agent functions as a sophisticated personalised engine, dynamically curating a pre-show experience tailored to individual preferences and historical engagement patterns. By processing large amounts of event data, it delivers anticipatory content recommendations, predicts session popularity and highlights industry trends. Attendees arrive with a bespoke itinerary signposting their must-see products, services and connections.

3. Smart assistance: digital concierge. This highly responsive AI-powered digital assistant addresses a wide spectrum of pre-event inquiries. Its personalised service guides participants through registration and logistic complexities and constantly updates relevant

information. By anticipating user needs and offering immediate, contextually relevant support, this agent ensures a frictionless and stress-free pre-show experience.

Exhibition organisers: your operational powerhouse

Cognizant's multi-agent solution equips organisers with intelligent tools to optimise their operations, enhancing engagement and delivering data-driven ROI:

1. Market analyser: high-value customer targeting. This agent employs advanced predictive analytics to prioritise high-value customer segments, enabling a hyper-targeted and resource efficient marketing initiative.

identifying latent market opportunities, it empowers organisers to refine their strategic positioning and optimise resource allocation for maximal impact on key segments.

2. Conversion driver: activating hyper-personalisation. This agent converts interest into committed participation through behavioural analysis and personalised incentive mechanisms. By dynamically adapting content delivery and reward structures based on individual engagement patterns, it drives early registration and sustained pre-show interaction. Furthermore, it builds multi-channel communication strategies, ensuring consistent and contextually relevant messaging across all touchpoints to maximise conversion efficacy.

3. Event control centre: integrated resource and risk planning. This agent provides organisers with real-time, detailed visibility into multiple pre-show operational parameters. It facilitates complex event simulation and scenario planning, enabling optimised resource allocation across diverse registration tiers and predicted demand fluctuations. By providing proactive anomaly detection and sustainability-focused resource management, this agent empowers organisers towards operational resilience and minimised risk.

Six core agents: architecture and capabilities

Multi-agent architecture advantage

The multi-agent architecture creates an ecosystem of specialised intelligence working together in a seamlessly co-ordinated system.

**1. User entry:** Queries enter via multiple channels with interfaces tailored by user type

2. Task manager: Central hub parsing requests with LLM technology, routing to specialised agents

3. Specialised agents: Six dedicated agents process components simultaneously

4. Safeguarding layer: Monitors actions, enforcing compliance and data integrity

5. Execution layer: Synthesises outputs into cohesive actions across all channels.

A glimpse into the pre-show multi-agent AI solution
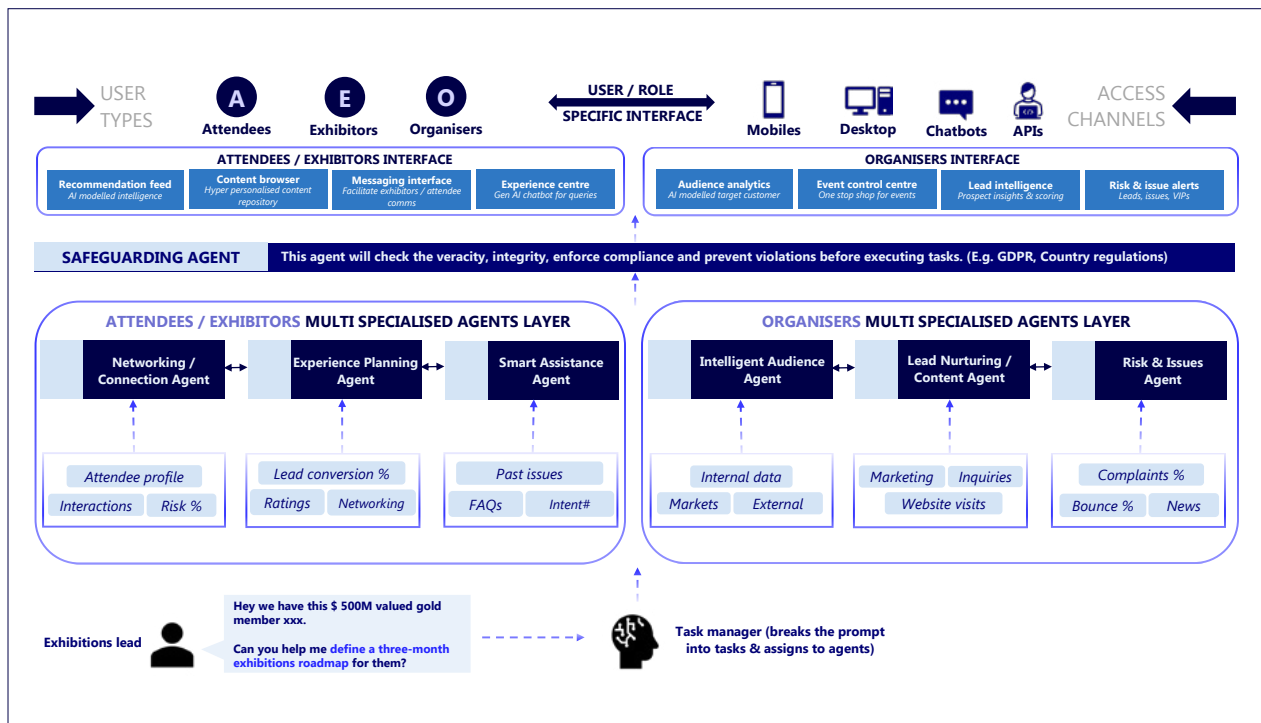
How it works

Our proprietary architecture delivers four key advantages:

1. Connected decentralisation: Specialised expertise through dedicated agents while maintaining system-wide intelligence flow

2. Cross-functional intelligence: Both vertical (attendees and organisers) and horizontal (marketing, event logistics, lead acquisition) agents interacting seamlessly

3. Bidirectional learning: Continuous improvement through information exchange between agents

4. Integrated compliance: Safeguarding embedded throughout workflow, not just as gateway

This approach transforms fragmented pre-show processes into cohesive, intelligent journeys that deliver measurable ROI and technological leadership.

IT AGENTS   **LOGISTICS AGENTS**

User query
User initiates a specific comman or request

Task manager
The task manager breaks the query into tasks using LLMs and assigns them to agents

Specialised agents
LLM-wrapped agents handle specific tasks, interacting with each other

Safeguard agents
Safeguard agents enforce compliance, prevent violations, and verify data integrity

Action execution
The system makes a decision baswd on the agents collective output

The potential pre-show market size for multi-agentic AI

Even at this early stage, the potential market for multi-agentic AI within the pre-show sector is considerable. According to our estimates, the Serviceable Addressable Market stands at $600 million:

- AI adoption in exhibition tech stands at 40% and is therefore worth a potential $1.35 billion

- Target markets (North America, Europe, APAC) account for 75% of that market = $1 billion

- Of that, 60% are B2B and trade shows = $600 million

We calculate that the near-term Serviceable Obtainable Market is $30 million: this represents a realistic 5% penetration rate within the first 24 months.

This initial market opportunity focuses on top exhibition organisers and enterprise exhibitors—segments with the highest AI readiness and most immediate ROI potential. This targeted approach establishes the foundation for broader market adoption.

Driving value: empowering your pre-show team with multi-agentic intelligence

Multi-agentic AI is not about incremental improvements, but a fundamental shift in how pre-show operations is executed. This strategic force multiplier focuses on four key areas: ROI, engagement, data and operations.
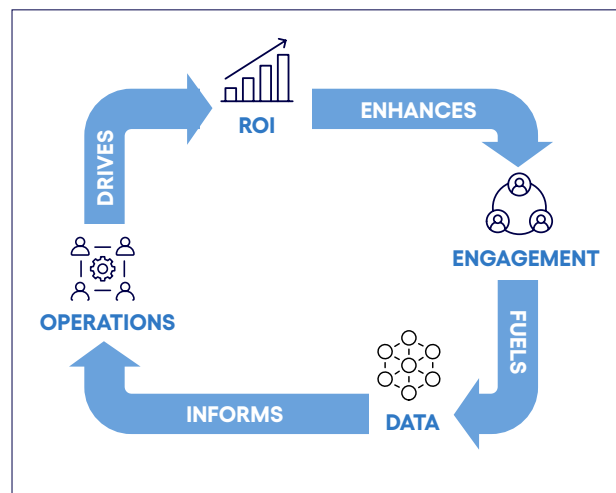
ROI-focused expertise

- **Gain clear attribution insights.** Precise understanding of which pre-show activities drive qualified lead generation, allowing for optimised resource allocation and demonstrable exhibitor value.

- **Accelerate content delivery.** Significantly faster content cycles **(20-60%)** through intelligent automation, ensuring timely and impactful communication.

- **Enhance customer support efficiency.** Faster **(30% reduction in response time)** and more accurate responses to exhibitor inquiries, fostering stronger relationships and increased satisfaction.

Engagement-driven interactions

- **Offering sentiment-aware assistance.** Proactive interventions and personalised guidance by not only understanding customer needs but also detecting sentiment and anticipating potential challenges.

- **Build proactive lead intelligence.** Valuable connections for exhibitors by leveraging insights into attendee interest, enabling targeted outreach and support.

- **Access intelligent knowledge delivery.** Teams have more power with, for instance, access to a comprehensive knowledge base, enquiring about quick and accurate answers to queries.

Data-fueled performance

- **Gain holistic data insights.** Comprehensive understanding of buyer behaviour patterns informs more effective outreach and support strategies for customers.

- **Comprehensive intelligence aggregation.** Informed decisions with insights synthesised from multiple data sources, providing a deeper understanding of exhibitor and attendee needs.

- **Identify opportunity landscape.** Uncover unusual patterns in customer interest that enable teams to offer tailored solutions and enhance exhibitor satisfaction proactively.

Operations-optimised efficiency

- **Streamline workflows intelligently.** Freeing up teams from manual tasks through automation of complex customer onboarding, allowing them to focus on strategic initiatives.

- **Around-the-clock intelligent support.** Consistent and efficient support for customers across all time zones with 24/7 AI-powered infrastructure.

- **Predictive resource allocation modelling.** Intelligent insights derived from event simulations anticipate needs and allocate resources for maximum efficiency.

The future: engaged customers, event success

As the exhibition industry battles to revive customer satisfaction, the solution is clear. Multi-agent AI systems can transform the critical pre-show experience by driving high-quality customer acquisition, enhancing pre-event engagement and ensuring seamless onboarding – building the foundations for success on the main show stage.

Forward-thinking exhibition leaders who move beyond siloed point solutions to embrace integrated, intelligent architectures will not only capture immediate value but will help define the industry's future. As successful implementation of multi-agent AI demonstrates ROI and elevated customer experience, adoption will grow strongly across the sector.

Cognizant's Neuro® Multi-Agent AI Accelerator equips you with all the intelligent digital tools you need to ramp up your pre-show proposition, unlocking immediate value through higher stakeholder satisfaction, increased qualified meetings and improved financial outcomes. Giving you the competitive edge.

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