

Online or in person? Corporate Approach in Digitalisation and Future Trends of the Fairs and Conference Market

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Abstract

This paper aims to present and analyse the digitalisation of the visitor economy in Hungary and to explore the impact of the COVID-19 pandemic on the spread of digital services in the meetings and exhibitions industry. Drawing on recent international academic research, we explore how the COVID-19 pandemic influenced the digitalisation of the global market of meetings, conferences and exhibitions in our globalised world between 2020 and 2024. The central research question investigates whether digitalisation accelerated as a result of the demand shock experienced in a specific sector of the visitor economy due to pandemic-related restrictions. Digital solutions were already present in the business conference and fairs segment. We aim to substantiate whether these tools represented a breakthrough during and after the pandemic and in the context of corporate sustainability visions. The research methodology combines an academic literature review, data analysis, and semi-structured interviews with key stakeholders in the Hungarian conference and fairs market to gain insights into digitalisation trends and future perspectives. The findings of the study show that service providers introduced digital services to overcome the barriers during the COVID-19 pandemic and maintained them after the crisis successfully. Digitalisation in the event industry contributes to the competitiveness of service providers. For future research, we propose examining the preferences of Hungarian companies regarding participation in physical versus virtual business events and exhibitions, and evaluating whether the Hungarian Meetings, Incentives, Conferences and Exhibitions (MICE) industry can meet these expectations.

Keywords: visitor economy, exhibitions and trade fairs, digitalisation, trade promotion, COVID-19, pandemic.

JEL classification: L83, L86, M31

Introduction

Tourism has been among the fastest-growing sectors of the 20th and 21st centuries, playing a pivotal role in the Gross Domestic Product (GDP) growth of numerous countries (Akash et al., 2024; Toubes & Araújo-Vila, 2022). Over the past century, it has provided a vital pathway to prosperity and development, even for nations lacking such competitive advantages as mineral resources or industrial capacity. The expansion of globalisation is inextricably linked to the growth of tourism. Technological advancements supporting globalisation have significantly contributed to the development of the tourism sector over various periods. Innovations in transportation and communication since the 19th century have fueled the steady growth of both leisure and business travel (Chlodnicki et al., 2011).

Since the latter half of the 20th century, business tourism has evolved into an independent sector with substantial multiplier effects. Alongside leisure travel, business tourism gained increasing prominence by fostering specialised commercial and marketing niches, including

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conferences, exhibitions, trade fairs, and business-to-business (B2B) meetings (Martín-Rojo & Gaspar-González, 2024).

While tourism yields numerous benefits, its adverse effects cannot be overlooked. These concerns have increasingly dominated research and professional discourse. Key concerns include the negative consequences of overtourism on local communities, rising carbon footprints, environmental degradation, and heightened health and safety risks. Furthermore, the vulnerability of communities reliant on visitor economies has prompted various joint initiatives by international tourism and sustainability organisations (Toubes & Araújo-Vila, 2022). As this article demonstrates, the COVID-19 pandemic caused significant disruption in the otherwise unbroken growth trajectory of tourism. However, it did not halt the sector's long-term expansion. International studies and statistics indicate that, following the lifting of pandemic-related restrictions, the sector rebounded swiftly and is projected to maintain its upward trend.

This research also investigates whether the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector has successfully adapted to an increasingly digital landscape and whether it can competitively implement digital tools and services. We identified a significant research gap concerning *the digitalisation of the Hungarian business tourism sector*, as currently available data and surveys remain limited. To address this gap, the study assesses the digitalisation of the Hungarian MICE sector through a multi-step methodology. First, we conducted a comprehensive literature review and analysed available global databases to gain insights into the current state and future prospects of the sector. Additionally, the performance of Hungary's business tourism sector was evaluated based on existing data and industry publications. In the primary research phase, semi-structured interviews were conducted with Hungarian business tourism service providers and umbrella organisations to examine available digital services. In subsequent phases of the research, we plan to involve exhibitor and exporter companies to further deepen the analysis. Ultimately, this research aims to provide insight into successful digitalisation strategies for the Hungarian MICE sector.

Theoretical background

Significance and characteristics of the MICE sector

Global trade continued to expand between 2008-2020² characterised by substantial growth in the service sector alongside the global trade in goods. Since the early 2000s, digitalization has fundamentally reshaped the global flow of information and resources. The emergence of incremental innovations - including the internet, virtual and augmented reality (VR/AR), electronic payment methods, the rise of video streaming, and recently artificial intelligence - has significantly transformed segments of the service industry, notably tourism, hospitality, and the hotel industry, as well as the supporting services, conference, and business tourism. Beyond leisure tourism, the MICE sector exerts a significant multiplier effect. According to the definition introduced by the United Nations World Tourism Organisation (UNWTO)³ in 2007, the MICE industry encompasses Meetings, Incentives, Conferences, and Exhibitions. The sector's multiplier effect is particularly noteworthy because business travelers typically demand higher-quality services and spend more during their trips. As defined by Martín-Rojo (2022, cited in Martín-Rojo & Gaspar-González, 2024), the MICE sector includes, among others, the organisation of congresses, conferences, symposia, and seminars, as well as corporate symposia, meetings, matchmaking and partner-

² World Trade Organisation (WTO), <https://stats.wto.org/>

³ United Nations World Tourism Organisation, <https://www.unwto.org/>

seeking events, together with supplementary incentive programmes that accompany business events. This sector plays a crucial role not only within the tourism sector but also in facilitating international market expansion. For instance, participating in international exhibitions provides a strategic platform for business growth; trade fairs remain an essential component of international marketing and sales strategies, enabling firms to achieve diverse business objectives (Tafesse & Skallerud, 2017).

MICE Industry's Global Impact

To illustrate the economic importance of the MICE industry, this study draws on several statistical sources. The UNWTO World Tourism Barometer anticipated a full recovery to pre-pandemic levels in terms of spending and arrivals by the end of 2024⁴. Market projections from Fortune Business Insights further highlight this growth, valuing the global MICE market at USD 904.30 billion in 2023. This figure is projected to rise from USD 970.76 billion in 2024 to USD 1,932.73 billion by 2032, with Europe maintaining its position as the largest revenue-generating market⁵.

To underscore the economic significance of the MICE industry, this study draws on several key statistical sources. The UNWTO World Tourism Barometer anticipates a full recovery to pre-pandemic levels in terms of spending and arrivals by the end of 2024.

To demonstrate the impact of fairs and exhibitions within the MICE industry segment, we used the database of the *Global Association of the Exhibition Industry (UFI)* as a primary source. The first impact study by UFI was completed in 2019, providing a comprehensive overview of the “*direct, indirect and induced impact*” of the exhibition sector. Regarding the direct impacts, in 2019 – in the year preceding the pandemic – exhibition organisers sold 147 million net square meters of exhibition space, generating approximately 1,253.6 billion USD in direct spending across 4.8 million exhibitors and 353 million visitors. Regionally, Europe demonstrated high capacity, attracting 1.3 million exhibitors and 112 million visitors. North America was ranked second, followed by the Asian market, with a 20.4% share of direct spending (UFI, 2020). Regarding the impact of the exhibition industry on the target countries’ GDP and job creation, the industry contributed to the creation of more than 1.4 million jobs and 82.3 billion GDP output. “*Indirect impacts*”—such as event-related services and accommodation—and “*induced impacts*”—including energy and food supply chains—contributed an additional USD 201 billion to global GDP and supported over 3.4 million jobs across 180 countries (UFI, 2022).

It must be noted that there are significant differences among countries regarding the economic output and influence of exhibitions and fair industry. Established urban centers and traditional venues attract more events and visitors, compared to smaller cities or developing or regions. One reason for this may lie in the infrastructural background needed to organise a successful, high-quality international event. In conclusion, the exhibition and trade fair industry has a significant direct and indirect impact on host economies, with a strong positive influence on GDP and job creation, as well as on international competitiveness. However, the COVID-19 pandemic highlighted the inherent vulnerability of this service sector segment within a highly globalised landscape.

⁴ See: <https://www.unwto.org/un-tourism-world-tourism-barometer-data>

⁵ See: <https://www.fortunebusinessinsights.com/mice-market-108653>

Impacts of the COVID-19 pandemic on the MICE sector

Following the emergence of SARS-COV-2 at the end of 2019, the world's health institutions struggled to provide effective treatments or contain the virus's rapid spread (Abdal & Ferreira, 2021). The resulting restrictive measures had profound economic consequences across industry, trade, and services—particularly in sectors where physical proximity between providers and clients is fundamental to the business model. Tourism and the MICE sector have been among the first to be hit by these severe consequences. The lockdown induced by the pandemic had immediate and severe consequences for the meetings and exhibition industry. Due to the social distancing measures, most exhibition organisers had to cancel or postpone business events they had already organised. During the first two waves of the coronavirus epidemic, exhibition events have been almost entirely suspended; a gradual resumption only began in 2022. Certain limitations of exhibition-related activities (e.g. capacity limits on visitors in enclosed spaces) were in force until the end of 2022. It was not until 2023 that a significant upward trend in the sector was observed.

The Global Barometer survey conducted by UFI measured how exhibition organisers in each country rate their activity. Based on responses from 459 industry players from 62 countries, UFI categorised the level of activities as either "normal", "reduced" or "no activity". The survey, conducted in June 2020, revealed shocking results: while in January 2020, 85% of respondents rated their activity as normal, this figure plummeted to 5% by March. In April and May, 73% of exhibition organisers reported a total cessation of business operations (UFI, 2020). According to the survey conducted in January 2021, while 45% of the Barometer respondents had expected an increase in profits of more than 10% in 2019 compared to the previous year, in 2020 the average turnover of respondents was only 28% of that in the previous year. 52% of the exhibition organisers surveyed were making a loss, and a third had lost 50% of their profits (UFI, 2021). The Barometer survey is conducted every six months, and by June 2022, the results showed that turnover levels reached 73% of those in the pre-pandemic period. Industry players began to evaluate prospects optimistically, expecting to reach 2019's turnover levels by the first half of 2023⁶. This proved to be valid, as the June 2023 report announced that the expected revenues for 2023 were around 97% of the 2019 figures, with some industry players even expecting to exceed the 2019 results. The years 2022 and 2023 represented a "bounce-back" for the industry. This recovery was driven not only by the gradual lifting of trade and social distancing restrictions but also by the strategic emergence of digitalized services integrated into trade show events.

UFI's statistical data and trends witnessed in the exhibition industry align closely with the World Trade Organisation's report on global trade. The same "bounce-back" effect can be observed in the case of commercial services, travel, and tourism (WTO, 2022). While in the digital service sector, especially computer services, telecommunication and online learning and streaming, significant growth could be observed even during the pandemic period, and world exports have increased by 44% in 2023 compared to the previous year⁷. Digitalisation has emerged as a critical strategic priority, as adapting to a rapidly shifting external environment has become a primary challenge. Effective management changes and the internal improvement of the business models are crucial to maintaining market positions. Simultaneously, customer expectations have changed due to the widespread adoption of digital solutions that have now become standard within the exhibition market.

⁶ UFI The Global Exhibition Barometer, <https://www.ufi.org/archive-research/the-global-exhibition-barometer-july-2022/>

⁷ World Trade Organisation (WTO), <https://stats.wto.org/>

Research question and methodology

This research aims to investigate the digital transformation of the Hungarian MICE sector, specifically within the context of the COVID-19 pandemic. By employing a mixed-method approach—integrating both qualitative and quantitative techniques—the study provides a comprehensive analysis of the sector's adaptation, challenges, and future potential. The methodology encompasses a systematic literature review, secondary data analysis, and semi-structured interviews designed to elicit insights into the digitalization trends and future outlooks of key actors within the Hungarian conference and exhibition market.

Drawing upon the literature review and data analysis, the study addresses the following research questions:

- How has the pandemic influenced the digitalisation of the meetings sector?
- What are the development trends of the Hungarian MICE market?
- What are the preferences of Hungarian MICE stakeholders regarding online versus in-person participation?
- What changes should be made to the way companies participate at exhibitions and conferences in response to the shifting demands of exhibitors?

The research adopts a mixed-method approach to understanding the digitalisation trends within the MICE sector. Research methodology and research design follow the research onion model of Saunders (Saunders et al., 2016). This design facilitates the integration of numerical data and nuanced stakeholder perspectives. The primary objectives are to explore the role of the pandemic in accelerating digital transformation in the Hungarian MICE sector, examine stakeholder preferences for digital, hybrid, and in-person formats, and analyse the adoption, efficacy, and barriers associated with digital tools in Hungarian MICE activities relative to global benchmarks.

Data collection and analysis methods

To answer these questions comprehensively, the methodology employs mixed-data collection strategy. A systematic review of existing academic literature and industry datasets establishes the theoretical framework, encompassing global trends in MICE digitalisation, pandemic-induced innovations, and specific case studies from Hungary. Particular attention is paid to studies documenting the evolution and integration of digital tools, such as virtual exhibitions, augmented reality showrooms, and online matchmaking platforms.

Structured surveys form the basis of the quantitative data collection, targeting key stakeholders such as event organisers, exhibitors, and participants within the Hungarian MICE sector. The surveys focus on the adoption rates of and experiences with digital tools, preferences regarding event formats (digital, hybrid, or in-person) and the factors influencing the choice of format, including costs, audience reach, and technological capabilities. Secondary data from industry reports, including the UFI Barometer Reports and governmental publications, supplement survey findings, offering comparative insights into Hungary's digitalisation levels relative to global trends. Regarding the quantitative analysis, the survey data is analysed using descriptive statistics to identify trends and stakeholder demographics, while comparative analysis benchmarks Hungary's digitalisation maturity against international standards. Qualitative data collection is used to gather stakeholder experience and gain a better understanding of the challenges they face. Qualitative methods include semi-structured interviews with organisers, exhibitors, and participants, who provide contextual data about their experiences, motivations, and barriers to

embracing digital formats. Qualitative and thematic analyses is employed to extract recurring themes and insights from interviews. Content analysis further enriches the interpretation of open-ended survey responses.

To ensure representation across a broad spectrum of stakeholders actively involved in the Hungarian exhibitor sector a purposive sampling approach was adopted (Saunders et al., 2016). The sample includes exhibitors from various event types (trade fairs, conferences, and exhibitions) and attendees with varying levels of engagement in digital or hybrid formats. Data collection is supported by key cooperating partners, including export promotion agencies, conference organisers, and various umbrella institutions in Hungary. Target sample size is set at a minimum of 20–30 exhibitors and 3–4 interviewees. The findings are expected to contribute to the broader academic discourse on the impact of digital transformation in post-pandemic tourism and business sectors. By employing this systematic methodology, the study aims to provide a well-rounded perspective on the digital evolution of Hungary’s exhibition, fair and MICE sector, addressing existing gaps in industry practice and available data and reports from the sector in Hungary.

Discussion: impact of the pandemic on the digitalisation of the MICE sector

The development of digital tools at fairs and exhibitions

An important mission of modern-day exhibitions is to disseminate the latest trends and developments in the industry, to provide a platform for showcasing innovations and the announcement of new releases (Chlodnicki et al., 2011). Although digital services related to exhibitions had begun to permeate the sector prior to 2020, the pandemic necessitated an immediate shift from face-to-face interaction to a much more rigorous application of online solutions (Vitali et al., 2022). As Vitali (2022) observes, in the early 2000s, the first phase was characterized by the spread of the Internet and online marketing tools, where exhibition organisers began utilizing online platforms to recruit both exhibitors and visitors. Exhibitors adopted digital advertising tools to reach their target audience and promote their physical presence at the exhibition event. The emergence of social media further enhanced the possibilities for reaching their audience, especially in pre- and post-event marketing, to maximise visitors acquisition (Vitali et al., 2022). More recently, the integration of Radio Frequency Identification (RFID) technology and social media algorithms has enabled a much more complex and comprehensive analysis of visitor behavior and motivations. Such solutions can be used for on-site visitor tracking, designing optimal booth layouts, effective traffic flow, or enhancing security protocols. For instance, RFID-embedded badges allow for the precise monitoring of attendee density, which is critical for safety measures such as emergency evacuations.⁸ Virtual trade shows were created to complement or extend events, in addition to personal presence (Vitali et al., 2022).

By the end of the 2010s, digital supplementary services for exhibitions and fairs had become widely available. Based on exhibition websites, personal experience, and relevant literature, the most common and typical digital supplementary services are the following:

- Matchmaking and online partner search databases.
- Online meeting platforms.
- Online conferences, seminars, and learning tools.
- Virtual showrooms.
- Virtual booths.
- Games or interactive tools.

⁸ See example: <https://www.expotoolsusa.com/attendee-tracking/>

- Live streaming applications.
- Augmented reality showcases.
- Virtual reality (VR) meeting rooms and VR games.

Despite the availability of these tools, personal selling remained the focal point of fairs and exhibitions, as described by several authors (Skoko et al., 2022; Zhang et al., 2023). Rather than replacing in-person promotion, these digital solutions appeared alongside it as a complementary, additional element of the service package (Li et al., 2022). At the time of the pandemic outbreak, many of the above-mentioned digital solutions were already widely available, while others were still in development or undergoing continuous evolution. The initial cost of incorporating new technological solutions is high, which makes them less accessible to a broad customer group. However, the lockdown caused by the pandemic in the exhibition market generated an immediate and enormous demand for digital solutions (Skoko et al., 2022). As a result, ongoing developments were accelerated, or developers allocated significant additional resources to introduce new features⁹.

To evaluate the impact of the pandemic on digitalisation within the exhibition industry, this study refers to the June 2023 Barometer Report of UFI. (UFI, 2023), which provides a comprehensive overview of digital maturity and future trends. One of the most significant changes is that 64% of exhibition organisers have broadened their service package to include digital-type services such as visitor applications, advertising tools or other services. Furthermore, more than half of the respondents invested in the digitalisation of internal workflows and processes. These developments are mostly driven by the intense market competition, and the pursuit of the operational efficiency of the exhibition organiser. The strategic importance of this shift is further evidenced by the fact that one in four exhibition organisers has developed a digital transformation strategy. Additionally, 20% of global industry actors have either created a position in the management responsible for digital services or developed a “*digital product not directly related to an existing trade show or exhibition*” (UFI, 2023).

A review of several examples and case studies from recent academic literature suggests that the need for digitalisation and a highly competitive market, characterised by the changing expectations of visitors, has already existed globally. This presents a challenge for smaller countries with less-developed infrastructure compared to developed countries with more resources for future investments (Skoko et al., 2022).

Expected results of the research

Hungexpo, the largest exhibition venue provider in Hungary, and a member of UFI, does not currently offer any virtual or online solutions to accompany its events, as can be seen on its website. Consequently, the research questions and existing data and information were addressed by conducting a semi-structured interview with the state actor's representative responsible for conference tourism in Hungary. This is the first interview in a planned series, and we received the following insights from the Budapest Convention Bureau. The interview primarily explored the role of digitalisation in Hungary's MICE sector, the challenges encountered during its implementation, and the evolving trends in the industry. In the semi-structured interview, Ms Molnár-Győri Noémi, sales director, discussed the impact of digitalisation on Hungary's MICE sector, its gaps, and future opportunities. The key trends and challenges identified by the interviewee in Hungary are as follows: the pandemic accelerated the adoption of digital tools, such

⁹ An example of this is the continuous expansion of streaming and online meeting features in applications like Microsoft TEAMS or ZOOM during the pandemic.

as hybrid events, matchmaking platforms, and virtual reality. Hybrid events initially surged in popularity but are now diminishing in larger conferences as in-person interactions regain importance. Despite these advancements, challenges such as limited budget allocation, inconsistent data collection, and stakeholder reluctance to share information are hindering the full realisation of digitalisation's potential. Regarding the competitive position of Hungary, Ms Molnár-Győri stated, that the country's venues, particularly Hungexpo, are highly competitive due to their advanced infrastructure. However, insufficient four-star hotel capacity limits the ability to host large-scale events. Budapest's unique blend of historical charm and modern infrastructure remains a key strength in attracting international events. Looking to the future, the sales director emphasised that the sector is gradually embracing sustainability, although client demand for eco-friendly practices remains inconsistent. Improved data collection systems, enhanced collaboration among stakeholders, and high-precision digital marketing are critical for future growth. Maintaining a balance between digital and in-person formats, alongside Budapest's unique appeal, is essential for Hungary to remain competitive in the global MICE industry as well as in the leisure tourism sector. Further, semi-structured interviews will be conducted with stakeholders such as the Budapest Congress Centre and HUNGEXPO, as well as agencies involved in Hungarian export development, including the Hungarian Agricultural Marketing Centre¹⁰ and the Hungarian Export Promotion Agency¹¹, and their SME exhibitors. We expect these interviews to provide further insights and opinions from stakeholders about the current digital opportunities in the MICE sector – from both the host's and the participant's perspectives – as well as about its development opportunities and expectations.

Conclusions and further research

The MICE industry encountered unprecedented challenges during the COVID-19 pandemic, leading to the rapid adoption and evolution of digital tools and services. Despite the increased reliance on digital solutions during this period, the enduring value of in-person interactions remains evident. The physical presence of attendees at trade fairs and exhibitions remains essential, emphasising the need for a balanced integration of digital and traditional formats. While digitalisation has introduced new opportunities, such as enhanced efficiency and broader accessibility, it has also raised challenges, including cybersecurity threats and geopolitical risks. The sector now requires strategies that combine digital innovations with the experiential and interactive qualities of physical events. This approach not only meets changing consumer expectations but also ensures the industry's relevance and growth. The pandemic underscored the importance of adaptable business models and advanced technologies, such as virtual reality, virtual showrooms and streaming to optimise operations and reduce costs. These tools can enhance internal processes and provide cost-effective alternatives for showcasing products and facilitating meetings. In conclusion, the research will provide insight into the digitalisation trends within the Hungarian MICE sector, by building upon insights gained through a series of carefully planned semi-structured interviews and surveys. These interviews aim to gather perspectives from key stakeholders and industry players, thereby enriching the overall understanding of current practices, challenges, and future opportunities in the Hungarian MICE sector.

¹⁰ <https://en.amc.hu/>

¹¹ www.hepa.hu

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