

ISE 2026 IN BARCELONA



WHAT THE SHOW – AND THE CONVERSATIONS – REVEALED

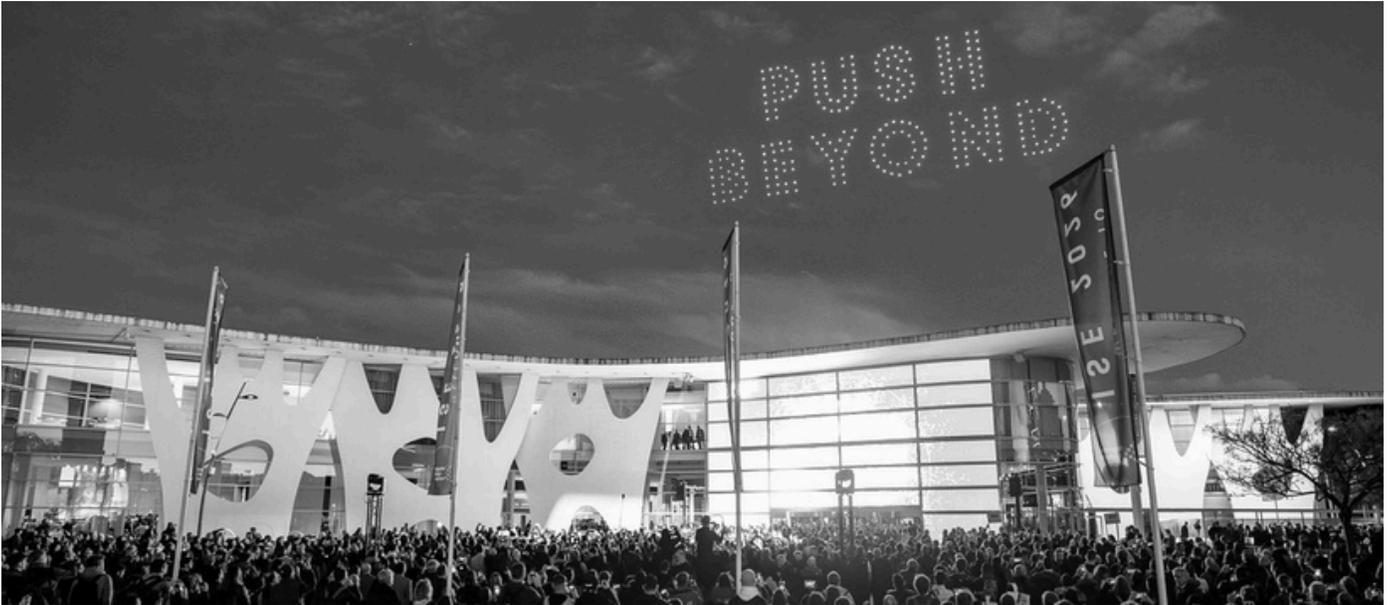
INSIGHTS – ISE 2026

By Russ Callahan



**LIVE
EVENTS
COALITION**

SETTING THE SCENE



ISE 2026 in Barcelona delivered exactly what it's known for: **scale, ambition, and a global view** of where live events and AV experiences are heading. The show floor was impressive by any measure—high production value, confident exhibitors, and no shortage of innovation.

But as I walked the halls and spent time in conversations—planned and unplanned—it became clear that the most important signals this year weren't just visual. They were human.

And they were complicated.

A Strong Show, Paired With Measured Caution



On the surface, ISE felt healthy. Attendance was solid. International representation remained broad. Companies clearly continue to believe in the power of face-to-face engagement.

Yet, particularly among U.S.-based exhibitors and partners, there was a noticeable shift in tone. Not pessimism—but caution. Conversations were thoughtful, pragmatic, and increasingly shaped by forces outside the show hall.

As someone operating inside the live events ecosystem every day, that stood out.

ECONOMIC SIGNALS SHAPING LIVE EVENTS

Tariffs Aren't Theoretical – They're Real Constraints

The U.S. tariff situation came up repeatedly, often without prompting. Not as a political statement, but as an operational reality.

At Quest Events, we live this every day. Not everything can suddenly be manufactured domestically, and even when it can, it doesn't happen overnight. Supply chains, materials, tooling, labor, and cost structures don't pivot on command.

What tariffs introduce—more than direct cost—is **uncertainty**:

- Can we price confidently for future programs?
- How do we commit to long-term exhibit strategies when inputs may change?
- What does “value engineering” really mean in this environment?

These aren't abstract questions. They directly affect how trade shows are designed, built, budgeted, and ultimately approved.

Trade Shows and Corporate Meetings Feel It Early

Live events often absorb economic and political pressure before other business functions do. When organizations feel unsure, discretionary spending tied to travel, visibility, and experience is where scrutiny shows up first.

What I heard at ISE wasn't “we're canceling.” It was:

- “We're shortening planning cycles.”
- “We're reassessing scale.”
- “We're being more selective.”

That distinction matters. The industry isn't retreating—but it is recalibrating.



INTERNATIONAL TRAVEL AS A QUIET PRESSURE POINT

One of the subtler but important realities this year was international travel. Multiple conversations reinforced what many of us are already seeing: **international travel remains down year over year**, and that has a direct effect on attendance, exhibitor staffing, and audience composition.

Fewer international trips mean:

- Smaller on-site teams
- Harder decisions about which shows matter most
- Less spontaneous collaboration across regions

For a global industry built on physical presence, this isn't insignificant. Trade shows thrive on density—of people, ideas, and energy. When travel tightens, that density shifts.



A Global Lens Makes Policy Local

Being in Europe sharpened the contrast. Many international exhibitors are accustomed to navigating regulatory complexity across borders. Still, there was clear curiosity—and concern—about how U.S. policy volatility could ripple outward.

Global shows like ISE amplify national decisions. What happens in Washington doesn't stay domestic when supply chains, production partners, and audiences are international.

WHAT THIS MOMENT IS ASKING OF OUR INDUSTRY



ISE 2026 reinforced something important for me: live events are resilient, but they demand adaptability.

This may be a moment for the industry to:

- Build more flexibility into exhibit and event models
- Communicate ROI earlier and more clearly
- Design programs that can scale intelligently without losing impact

Technology will keep evolving. Experiences will keep raising the bar. But confidence—among clients, partners, and attendees—is what ultimately sustains momentum.



Final Thought

Trade shows are human systems. They reflect not just what we build, but how we feel about the future.

At ISE this year, the floor was vibrant. The conversations were honest. And the industry—while very much moving forward—was paying close attention to the world shaping its next decisions.

That awareness may end up influencing live events just as much as any innovation we saw on display.