

UFI Global Exhibition Barometer

 **ufi** The Global Association of the Exhibition Industry

22nd Edition

Report based on the results of a survey concluded in January 2019

 **ufi** The Global Association of the Exhibition Industry

Global

 **AAEO** ASSOCIATION OF AFRICAN EXHIBITION ORGANISERS
 **EXSA** EXHIBITION & EVENT ASSOCIATION OF SOUTHERN AFRICA

Southern Africa

 **AEO** ASSOCIATION OF EVENT ORGANISERS

United Kingdom

 **AFIDA**

Central & South America

 **AMPROFEC**

Mexico

 **ASPERAPI** IECOA

Indonesia

 **EXHIBITION & EVENT ASSOCIATION OF AUSTRALASIA**

Australia

 **IEIA** Indian Exhibition Industry Association
The Gateway To India Trade Shows

India

 **Japan Exhibition Association**
—JEPA— 日本展示会協会

Japan

 **Macau**

Macau

 **SISO** SOCIETY OF INTERNATIONAL SHOW ORGANISERS

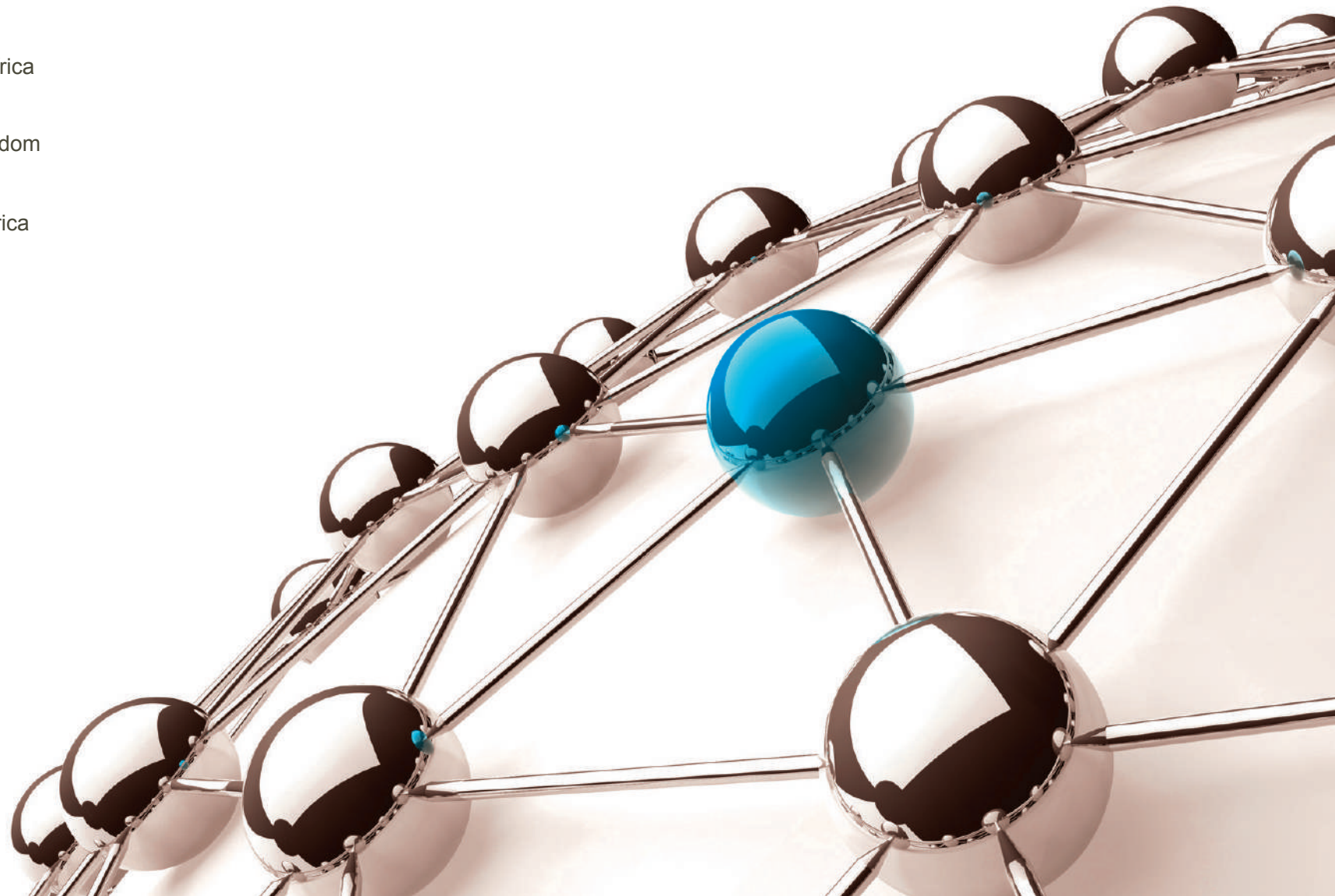
US

 **TEA** THAI EXHIBITION ASSOCIATION

Thailand

 **UBRAFE** União Brasileira dos Promotores de Feiras

Brazil



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Results by region

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Welcome to the 22nd edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, concluded in January 2019. It represents up to date information on the development and the outlook of the global exhibition industry as well as on 19 specific countries and zones.

UFI began assessing the impact of global economic conditions on the exhibition industry twice a year in 2009. Since then, it has regularly grown in size and scope, as numerous industry associations around the world have joined the project.

In addition to JEXA (Japan Exhibition Association), who joined as from this latest survey, these are AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFIDA (Asociación Internacional de Ferias de América) in Central and South America, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, MFTA (Macau Fair Trade Association) in Macau, SISO (Society of Independent Show Organizers) in the US, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

Important remarks

It should be noted that the number of replies to the current survey (302 from 53 countries - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 19 countries or zones where a significant number of answers were obtained.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at chris@ufi.org. This research is available online at www.ufi.org/research.

The 22nd Barometer surveyed the evolution of participants' gross turnover expectations for the second half of 2018 and the two halves of 2019 compared to their turnover during the same period in the previous year (regardless of possible biennial effects).

The following chart presents, at regional level, the percentage of companies declaring an increase in their turnover. It combines these results with those of previous surveys since 2008 and it does not take into account the "unknown" or "not applicable" answers.

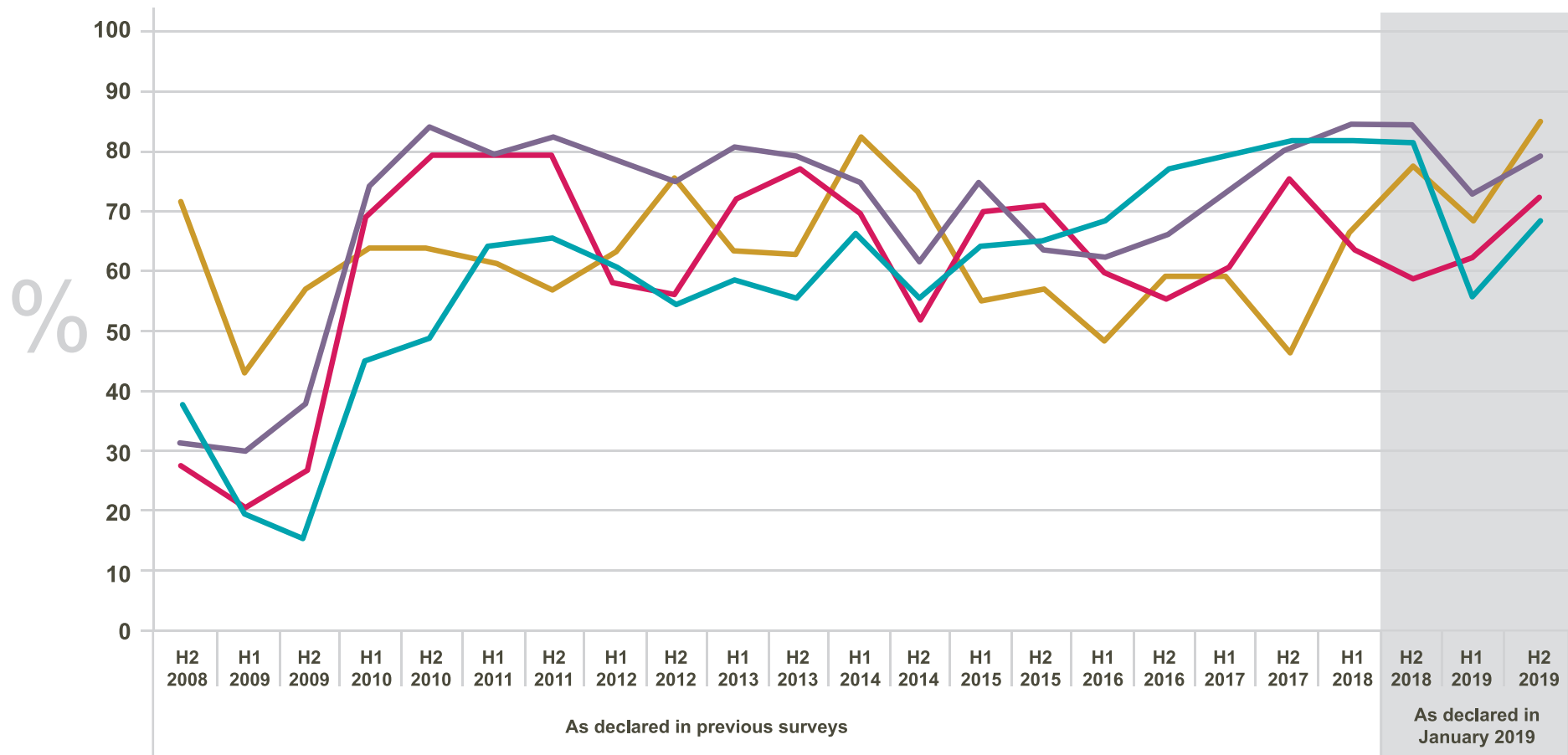
For each period between mid-2018 and the end of 2019, a majority of companies from all four regions indicate Gross Turnover increases. This positive outlook is especially strong in both Asia/Pacific and Middle East/Africa regions, where the highest levels in the last 5 years are recorded.

In the Americas and Europe however, the levels are lower than the high - ones recorded a year ago.

The charts included in the second part of this report ("Detailed results for selected countries or zones") detail these regional results, adding the percentage of companies declaring decreases in their turnover and the percentage of "unknown" answers.

% of companies declaring an increase in turnover when compared to their projections for the same period the year before (regardless of possible biennial effects)

Americas Europe Middle East - Africa Asia - Pacific



The 22nd Global Barometer survey questioned the evolution of operating profits for 2018 compared to the previous year. The following chart combines these results with those of previous surveys, which track the development of operating profits since 2009. It highlights the results of companies declaring an increase of more than 10% and those declaring a stable result (between -10% and +10%) – see footnote.

The results show that, in each of the four regions, 80% of companies maintained a good level of performance in 2018 and around 30 to 40% of them declared an increase of more than 10% compared to 2017.

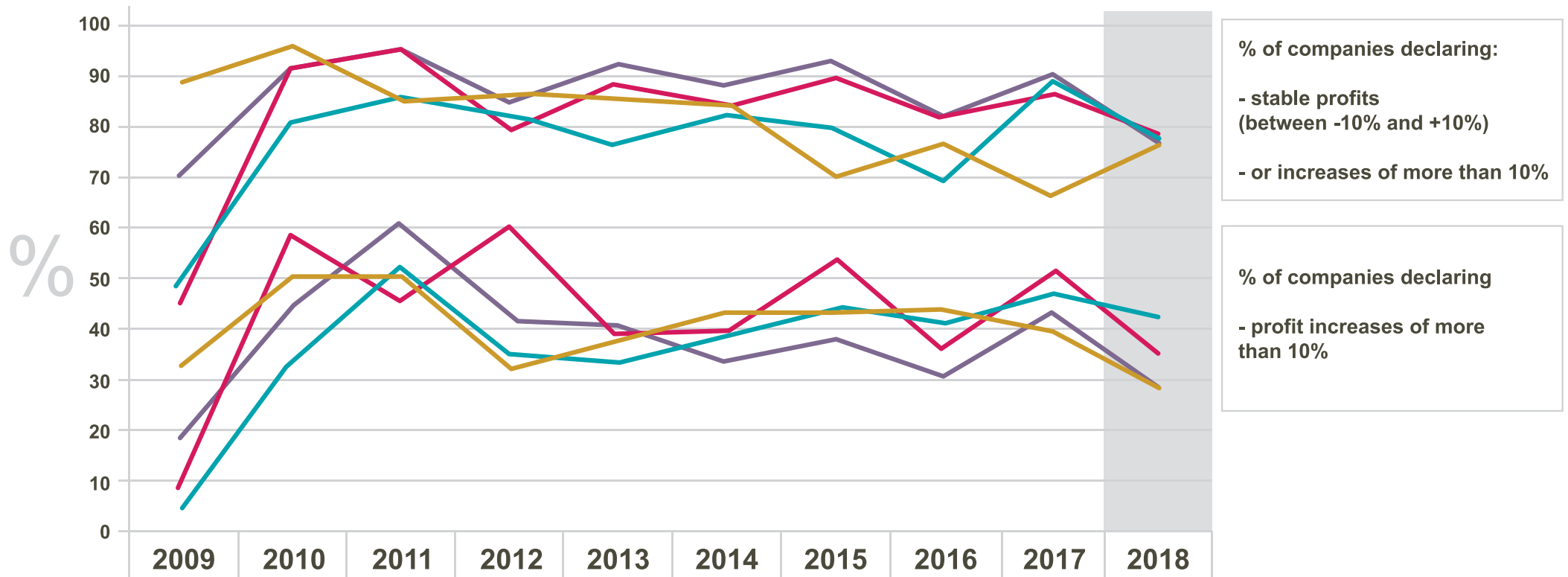
The highest proportions of companies declaring such an increase are observed in Mexico (62%), Italy (56%), United Kingdom (55%) and Indonesia (50%); on the opposite side, the lowest proportions are in Australia (18%), Russia (17%), Macau (10%) and the USA (8%).

A significant numbers of companies anticipate a reduction of their profit or loss in several submarkets: Central & South America (27% in Brazil and 35% in other countries), 27% in Asia/Pacific (for countries other than Australia, China, India, Indonesia, Japan, Macau and Thailand), 25% in the Middle East, and 23% in Germany and Japan.

Footnote: The charts included in the second part of this report (“Detailed results for selected countries or zones”) detail these results, adding the percentage of companies with reductions in profits or losses.

Operating Profits compared to the previous year

Americas Europe Middle East - Africa Asia - Pacific



Most Important Business Issues

Companies were asked to identify the three most important issues for their business in the coming year from a pre-defined list of seven issues. Multiple choices were provided to get further insights for some answers.

As in previous surveys, the clear majority of all answers relate to the following 4 issues:

“State of the economy in home market” (25% in the current survey, up 1% compared to 6 months ago);

“Competition from within the industry” (19% in the current survey, up 1% compared to 6 months ago);

“Global economic developments” (20% in the current survey, up 2% compared to 6 months ago);

“Internal challenges” (15% in the current survey, down 2% compared to 6 months ago), where “Human resources” are named as the most important aspect.

“Impact of digitisation” (“Responding to customer digitisation needs”, “New digital products” or “Internal processes”), “Competition with other media” (“Internet”, “Social media”, “Virtual trade shows” or “Other”) and “Regulatory / Stakeholders issues” (“Sustainability”, “Health & safety” or “Other) keep similar levels to the last survey.

The following pages show the consolidated global results, including further insights. They also detail these results by region and by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”). The results show some differences:

“Global economic developments” appear as less of a concern in the Americas than in all other regions of the world.

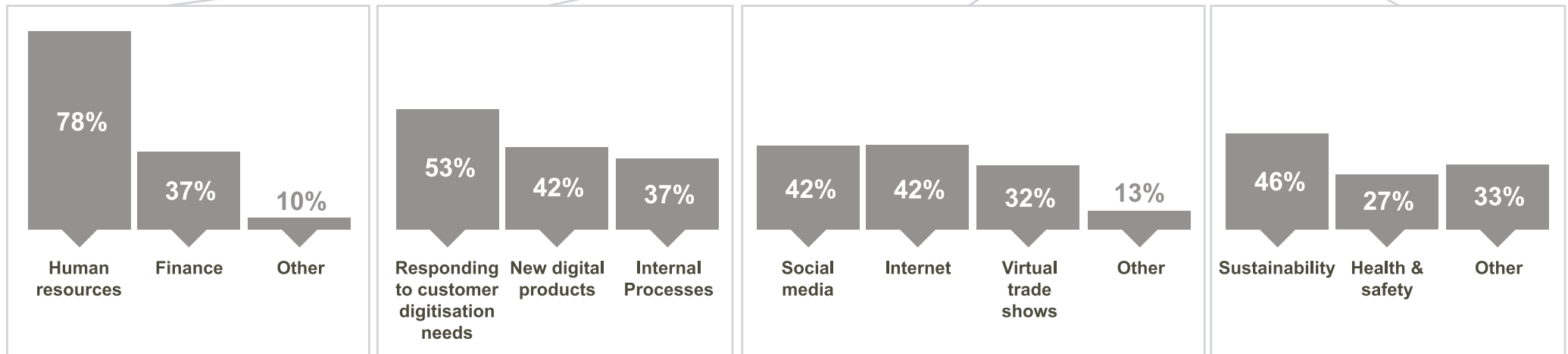
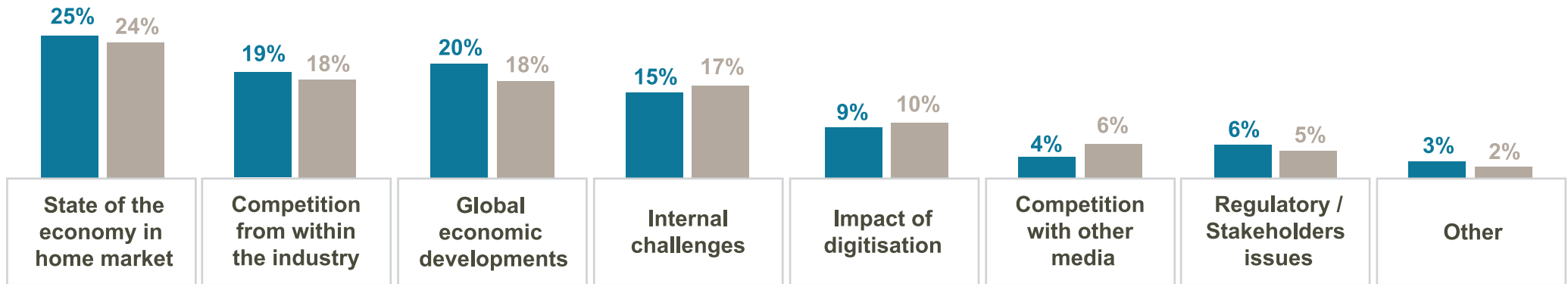
“Competition from within the industry” appears as more of a concern in Asia-Pacific, compared to other regions.

“Competition from within the industry” and “Impact of digitalisation” are less important for venues than for organisers and service providers.

Top Issues: Global Results

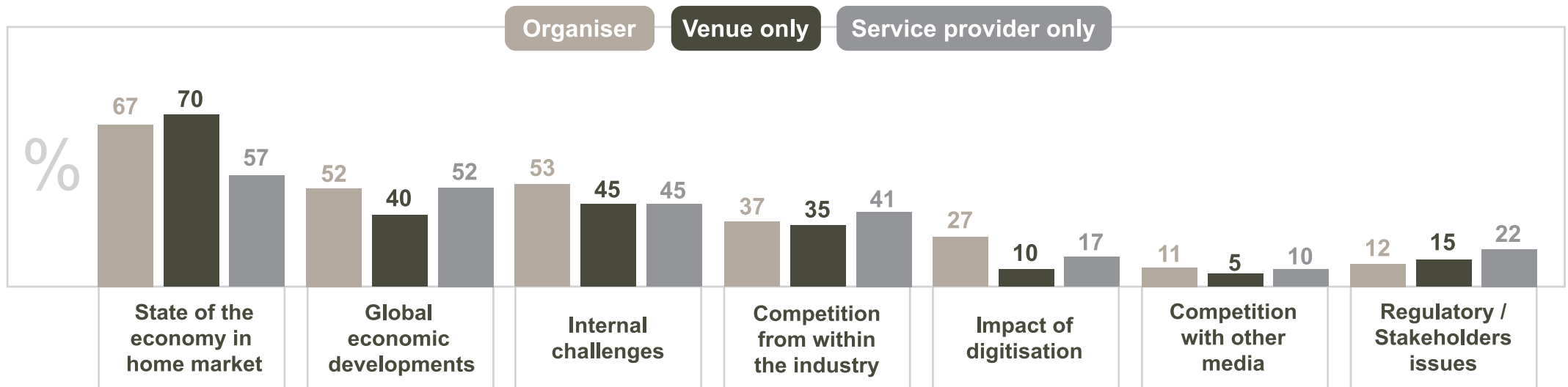
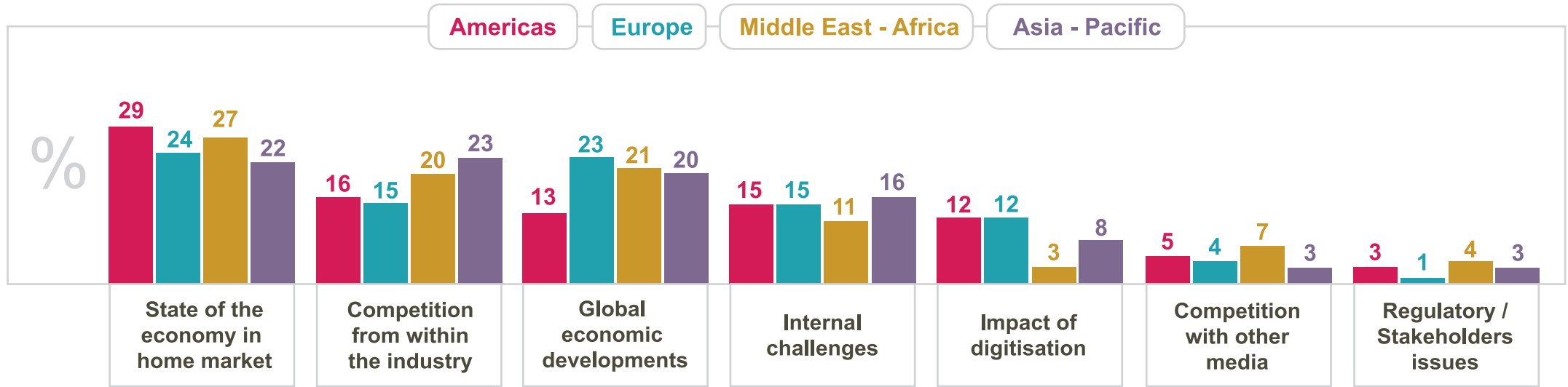
Results from current survey – December 2018

Results from last survey - June 2018



(multiple answers possible)

Most important issues: detail by region and type of activity



What Makes an Event More Enjoyable?

The recent “Global Visitor Insights” produced by UFI and EXPLORI (see footnote) indicates that visitors increasingly expect personalised experiences and entertainment appears to be especially important for the younger attendees. The study also indicates which components visitors consider “most likely to make a trade show entertaining or enjoyable”.

The same question was asked in the 22nd Global Barometer survey and the results are indicated in the next pages.

The first chart on the next page indicates the survey results, where companies selected 3.7 answers on average. These results are then weighted to the same level of answers as in the “Global Visitor Insights” in order to compare them.

The results highlight a good matching between the view of the exhibition industry and that of the visitors, with the most important items being selected in a similar way: “Talks and presentations delivered in different ways” (42% for visitors and 40% in this survey), “New technology such as Virtual Reality” (34% for visitors and 28% in this survey) or “Informal networking” (29% for visitors and 37% in this survey).

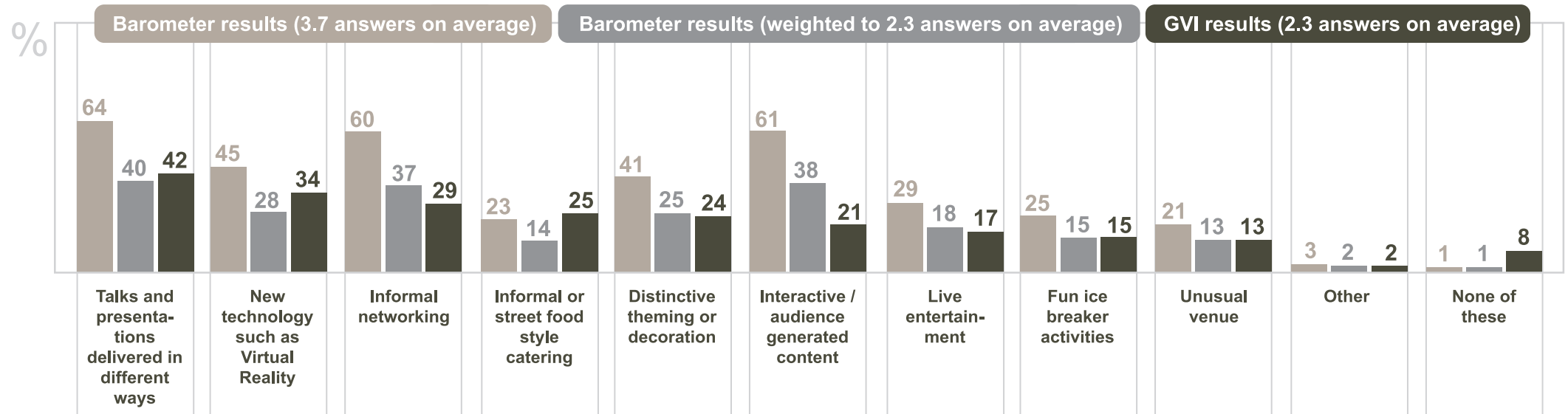
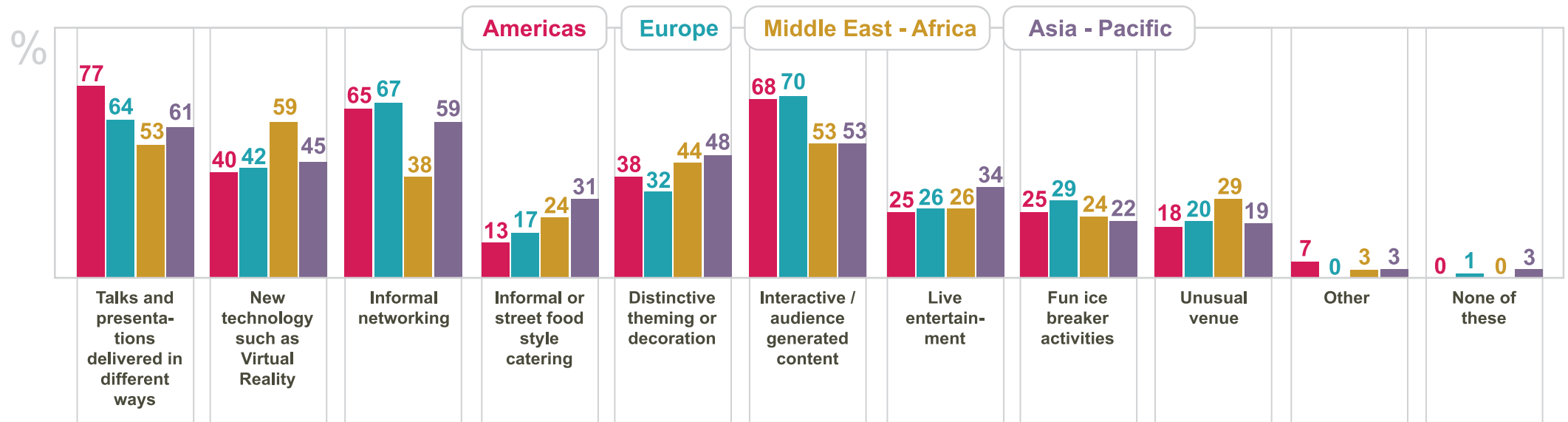
The most significant differences between visitors and the industry are for “Informal or street food style catering” (25% for visitors and 14% in this survey) and Interactive / audience generated content (21% for visitors, but 38% in this survey).

The second chart on the next page shows the results by region. Overall results don’t vary much, but the most cited element does:

- In the Americas and in Asia/Pacific, “Talks and presentations delivered in different ways” receives the most backing;
- In Europe, “Interactive / Audience Generated Content” receives the most backing;
- In the Middle East / Africa region, “New Technology such as Virtual Reality” is seen as the most relevant element.

Footnote: This study – whose results are available at www.ufi.org/research (full report available to UFI Members) was based on data from a quantitative survey of over a million global trade show visitors, resulting 13,000+ responses, representing 135 countries, 18 languages and attend trade shows in at least 21 countries.

What Makes an Event More Enjoyable? By region and type of activity



Priorities in terms of strategy

Companies were asked to share their current priorities in terms of strategy in two specific areas: their range of activities and their geographical exposure.

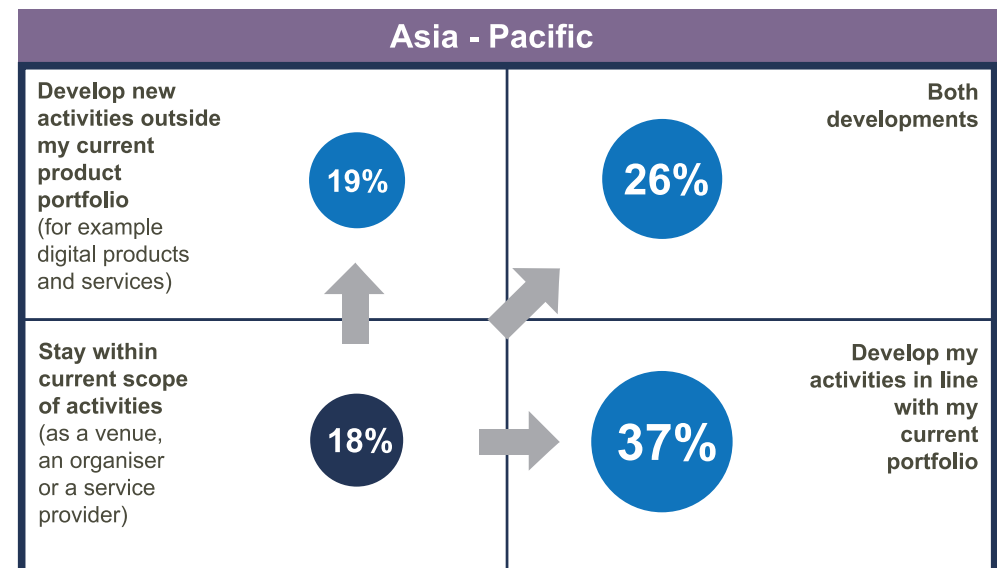
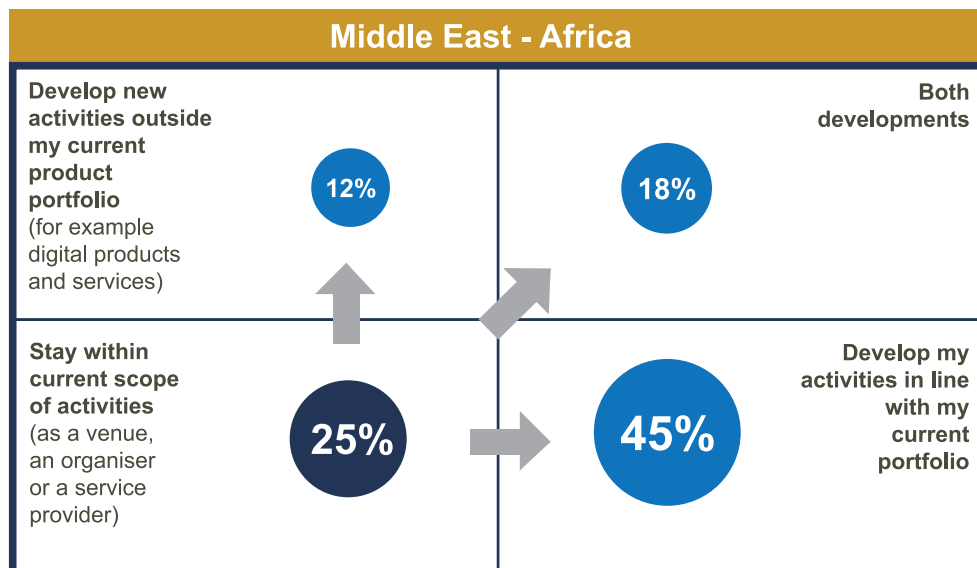
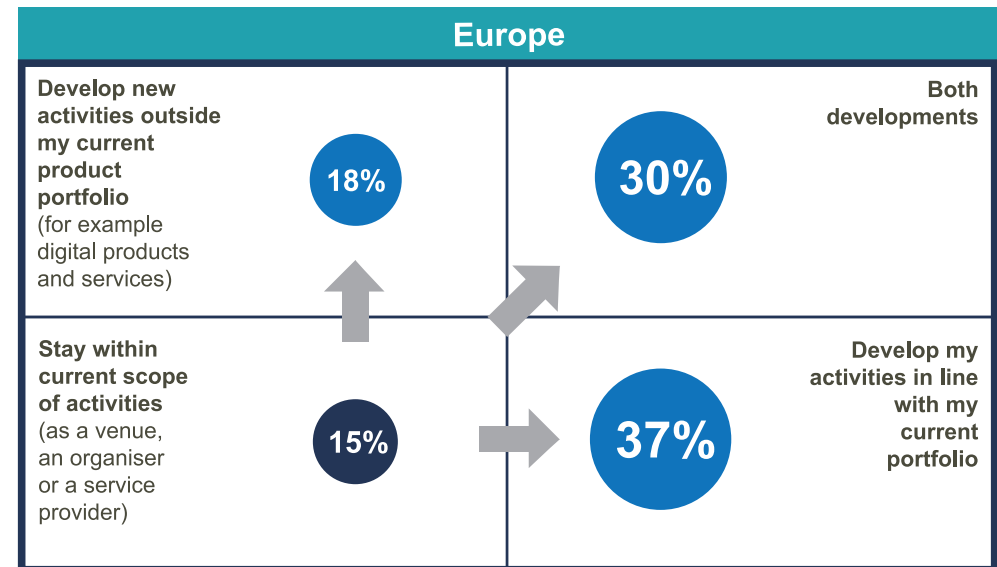
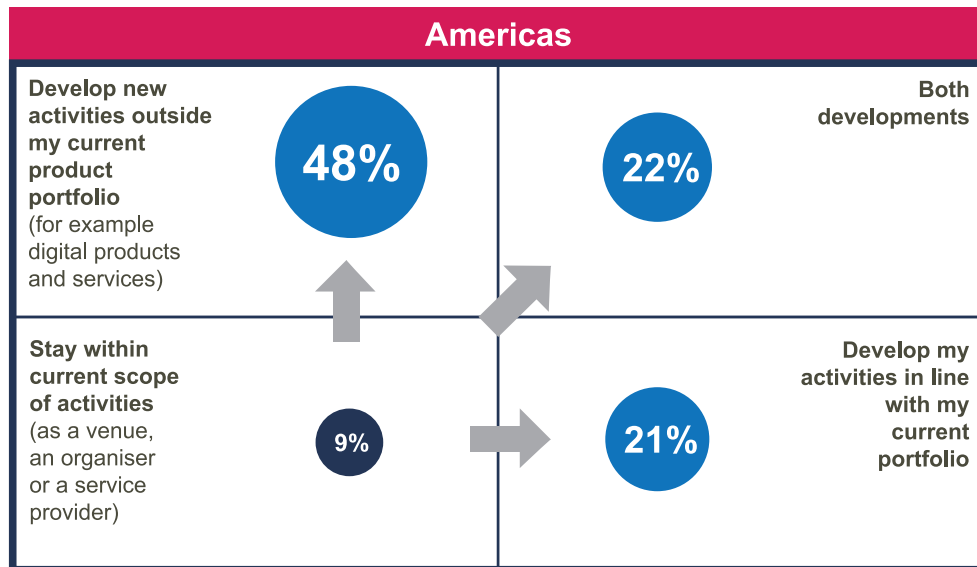
In all regions, a large majority of companies intend to develop new activities, either in the classic range of exhibition industry activities (venue/organiser/services), or outside of the current product portfolios, or in both areas: 75% in the Middle East & Africa, 82% in Asia/Pacific, 85% in Europe and 91% in the Americas.

In terms of geographical expansion, 4 companies out of 10 on average declare an intention to develop operations in new countries.

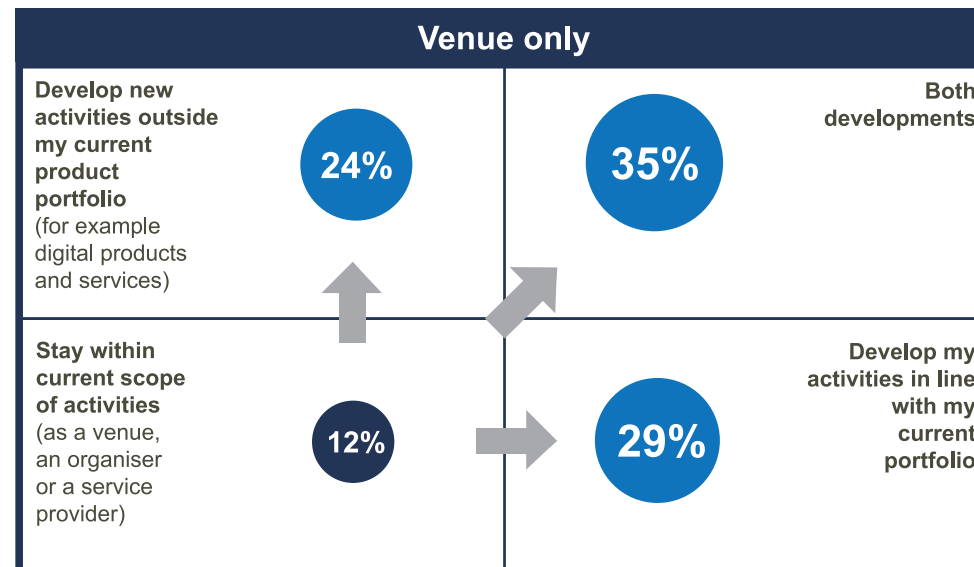
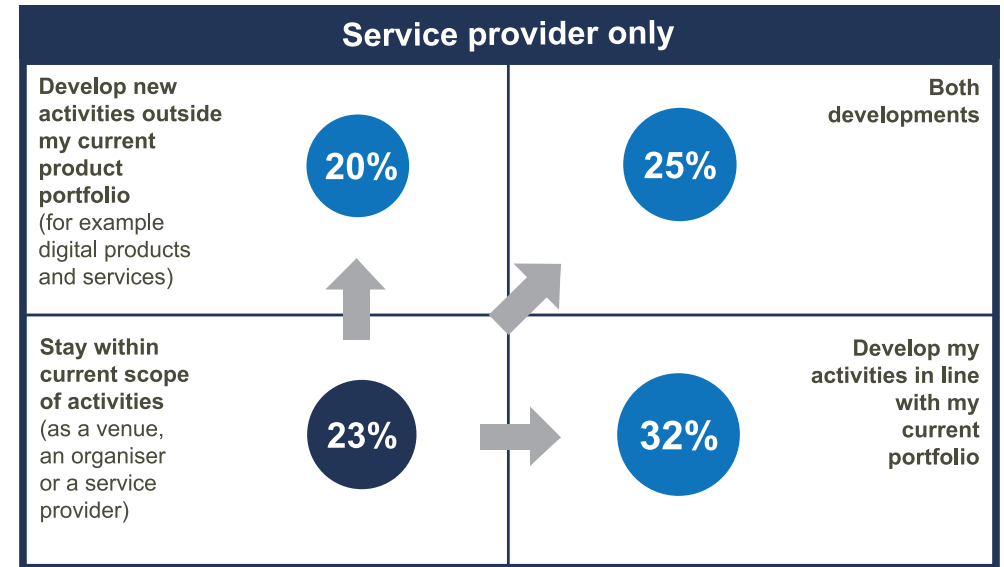
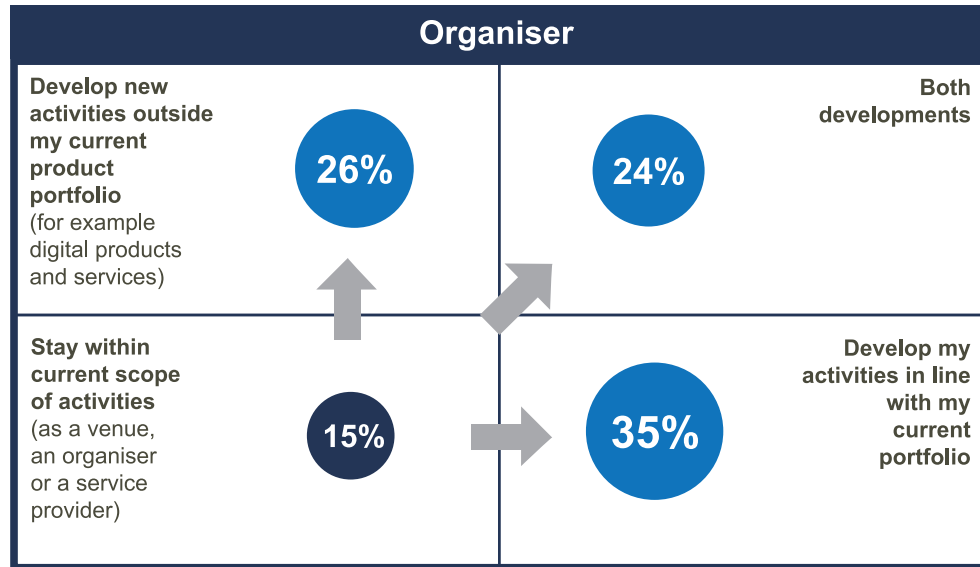
At region level, Europe and Americas show the biggest increase for this development when compared to the situation a year ago: a majority of companies from Europe - 51% - now plan to operate in a new country (+12% since last year) and this is the case for 41% of respondents in the Americas (+11% since last year).

At country level, international development is on the agenda of a majority of companies in 6 of the 19 markets analysed: the UK (89%), India (71%), Italy (63%), Germany (60%), “other countries in Asia/Pacific” (58%) and USA (50%).

Current strategic priorities related to the range of activities: by region



Current strategic priorities related to the range of activities: by type of activity

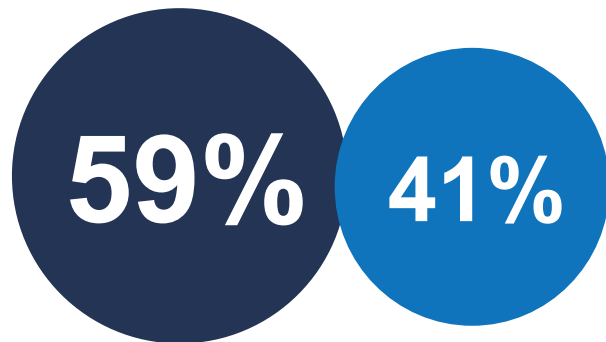


Current strategic priorities related to geographic exposure: region

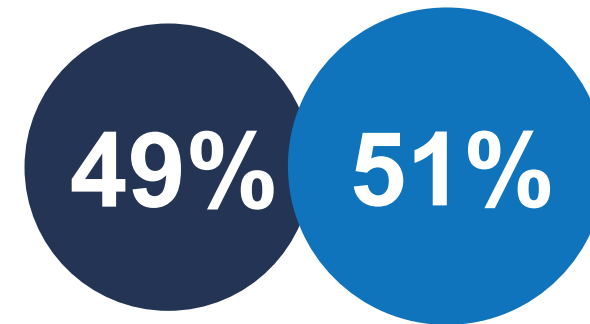
Stay in the same countries as those in which I currently operate

Operate in new countries

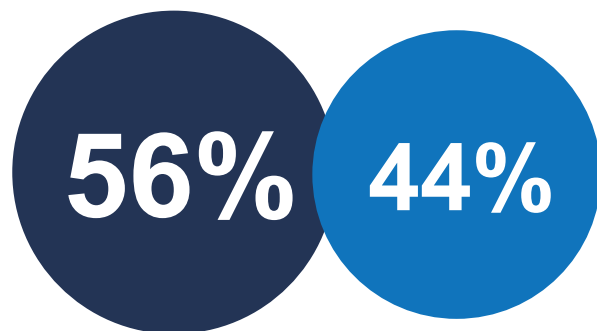
Americas



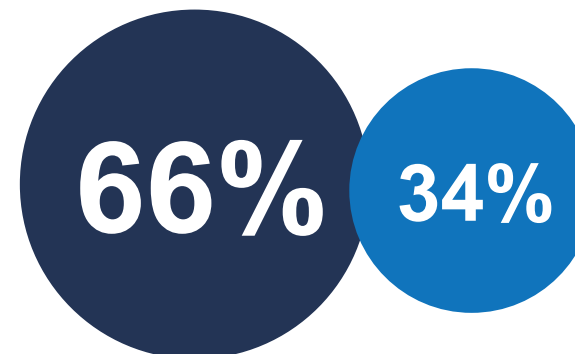
Europe



Middle East - Africa



Asia - Pacific



Current strategic priorities related to geographic exposure: by type of activity

Stay in the same countries as those in which I currently operate

Operate in new countries

Organiser

58%

42%

Service provider only

60%

40%

Venue only

64%

36%

Part 2: Detailed results for 19 selected countries or zones

North America:

Mexico
US

Central and South America:

Brazil
Other countries

Europe:

Germany
Italy
Russia
United Kingdom
Other countries in Europe

Africa:

South Africa

Middle East:

Middle East

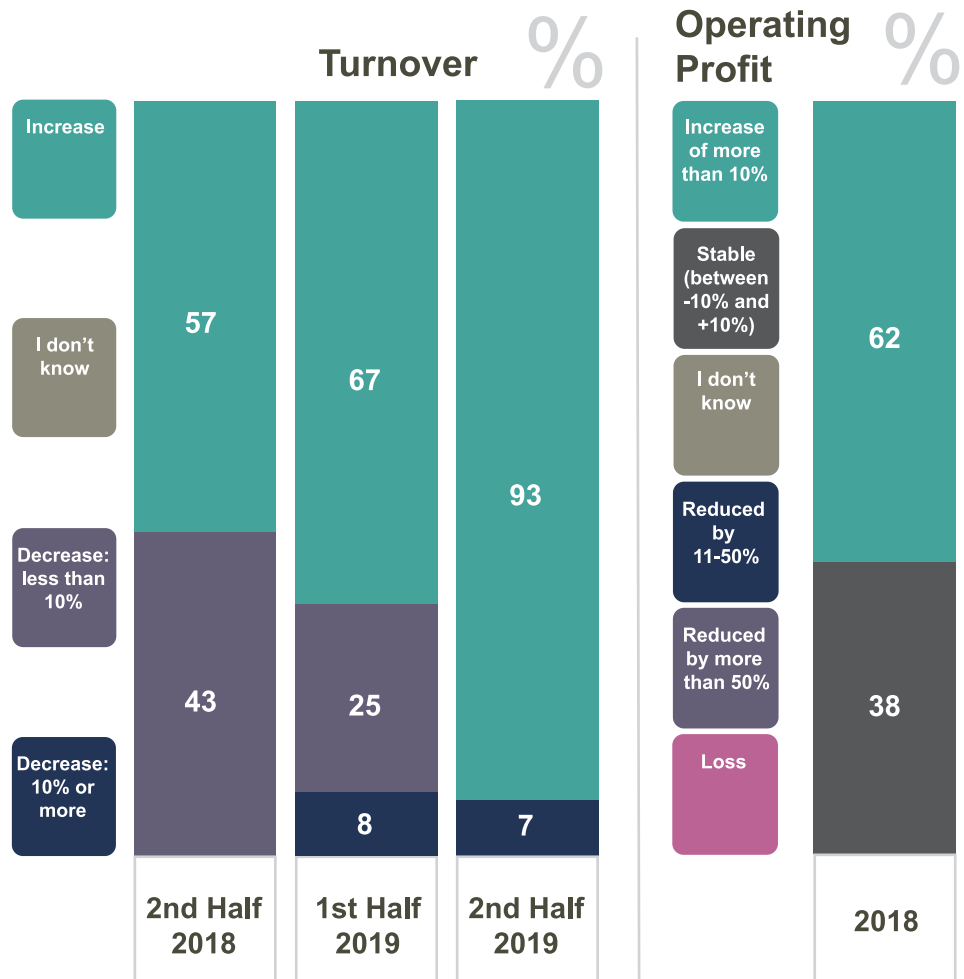
Asia - Pacific:

Australia
China
India
Indonesia
Japan
Macau
Thailand
Other countries in Asia - Pacific

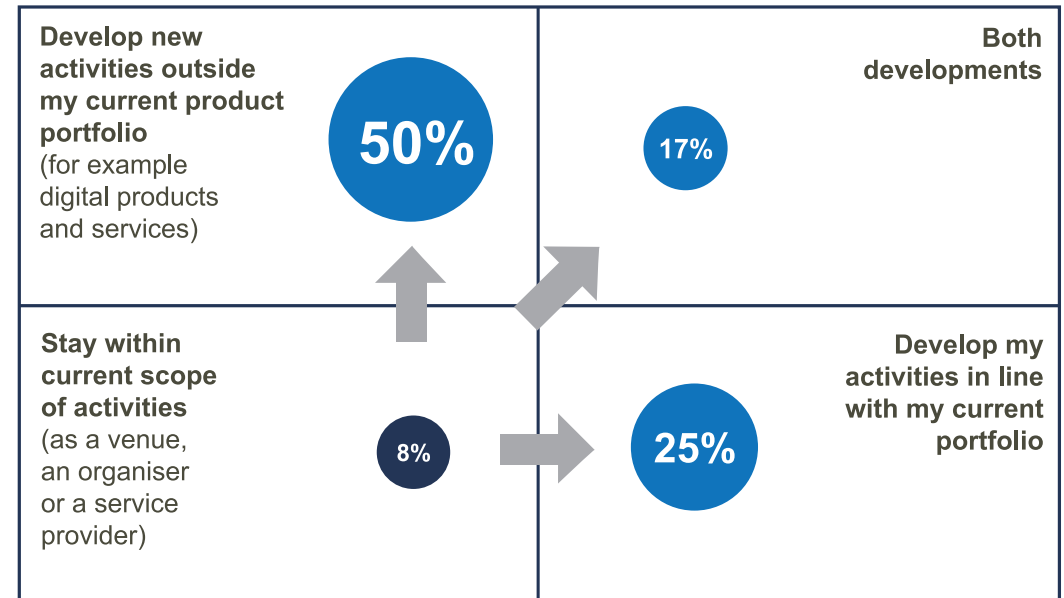
Detailed results for MEXICO



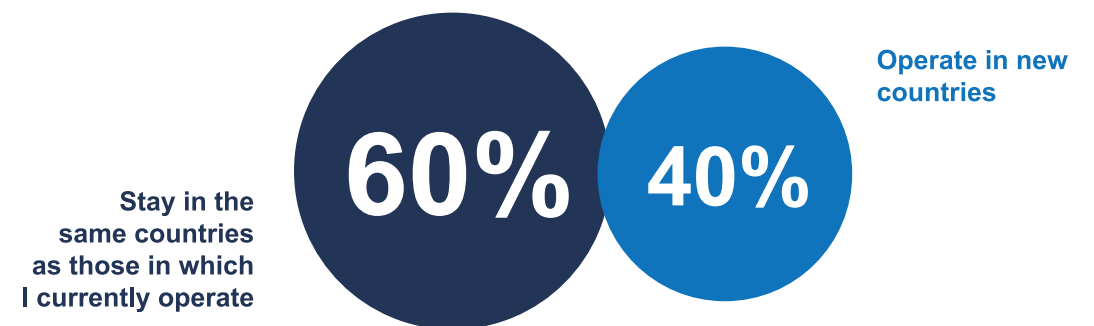
Financial expectations of Mexican exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

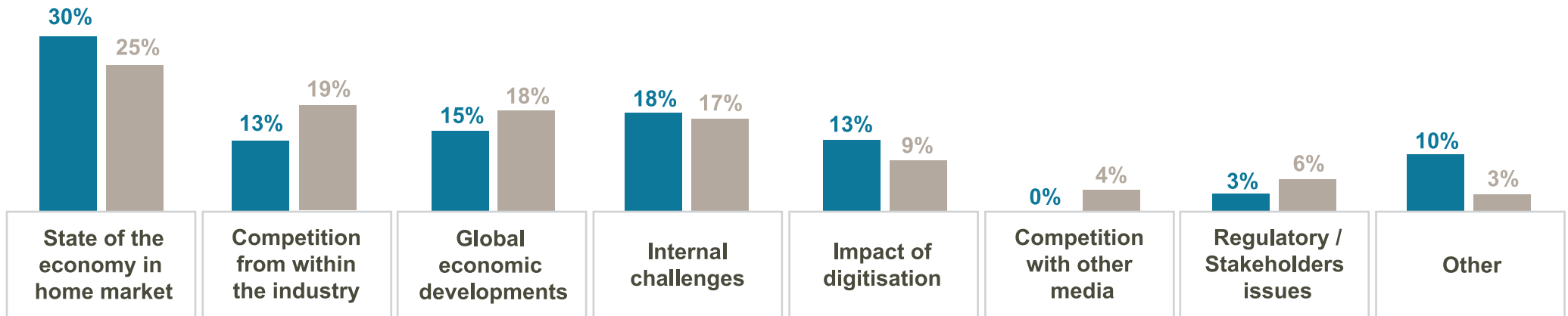


Detailed results for MEXICO



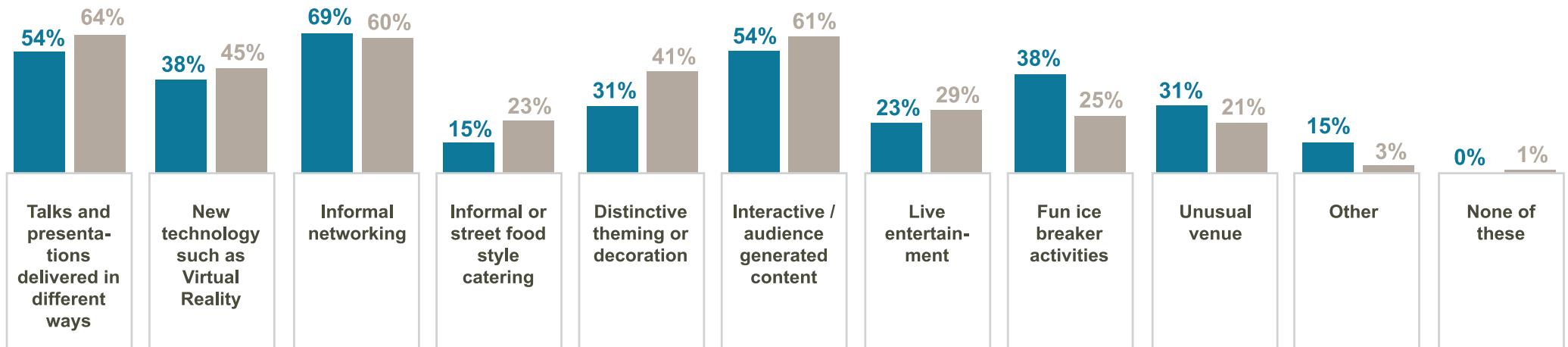
Most important business issues in the exhibition industry in Mexico and globally

Mexico Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

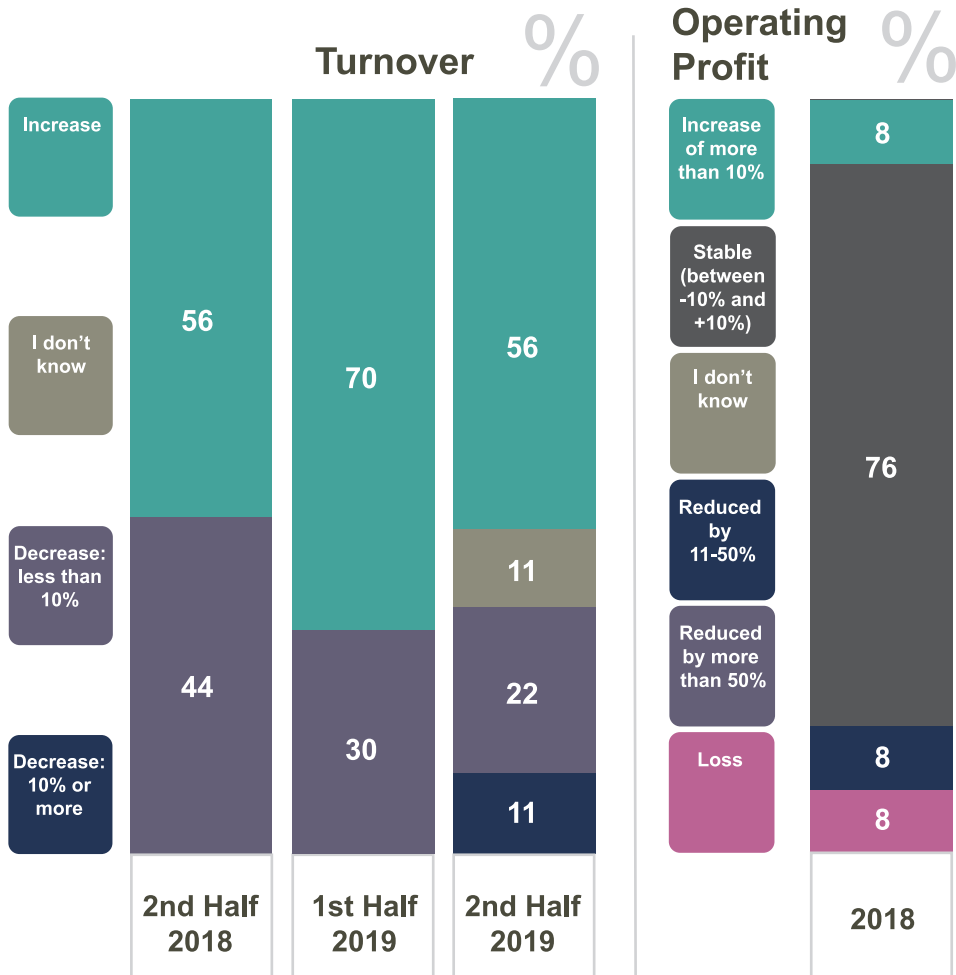
Mexico Global



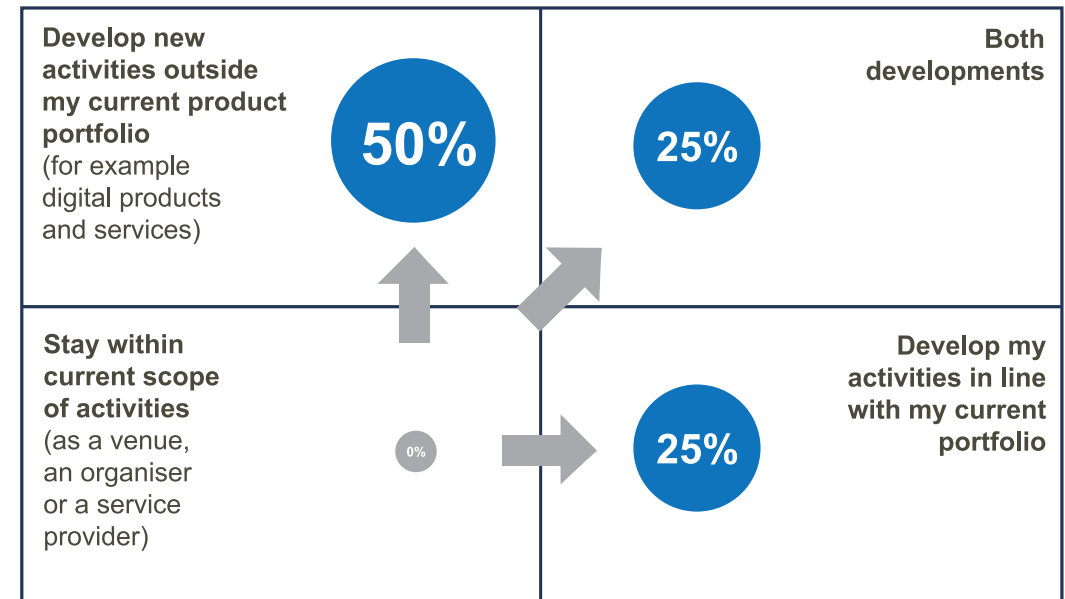
Detailed results for US



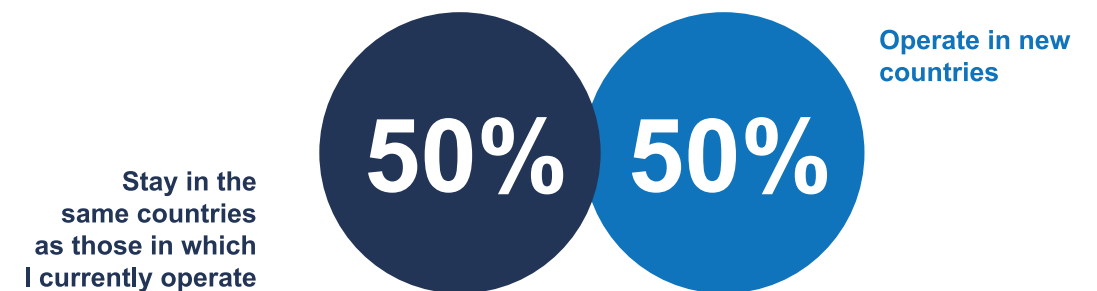
Financial expectations of US exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



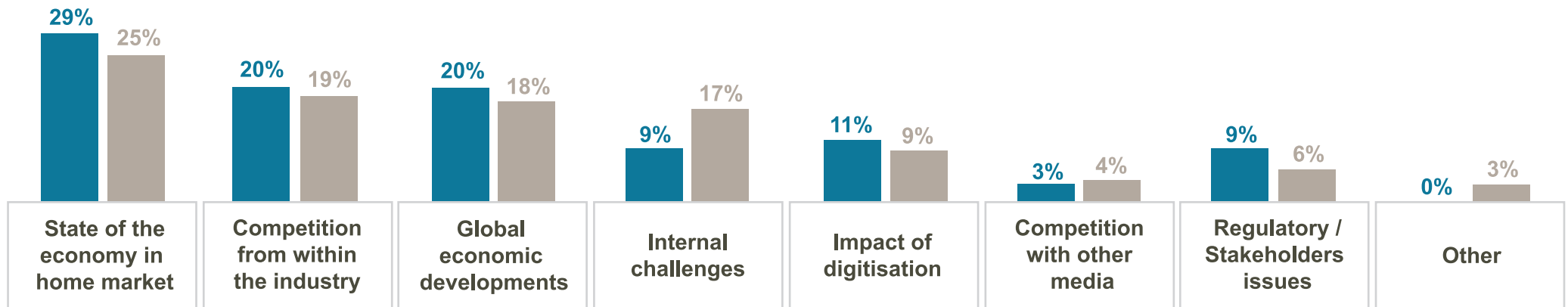
Detailed results for US



Most important business issues in the exhibition industry in the US and globally

USA

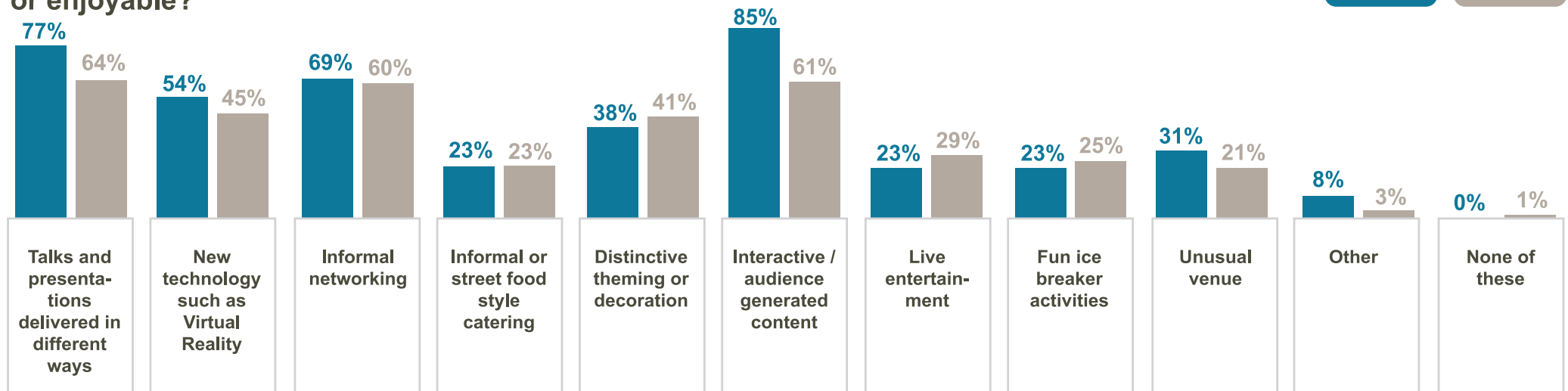
Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

USA

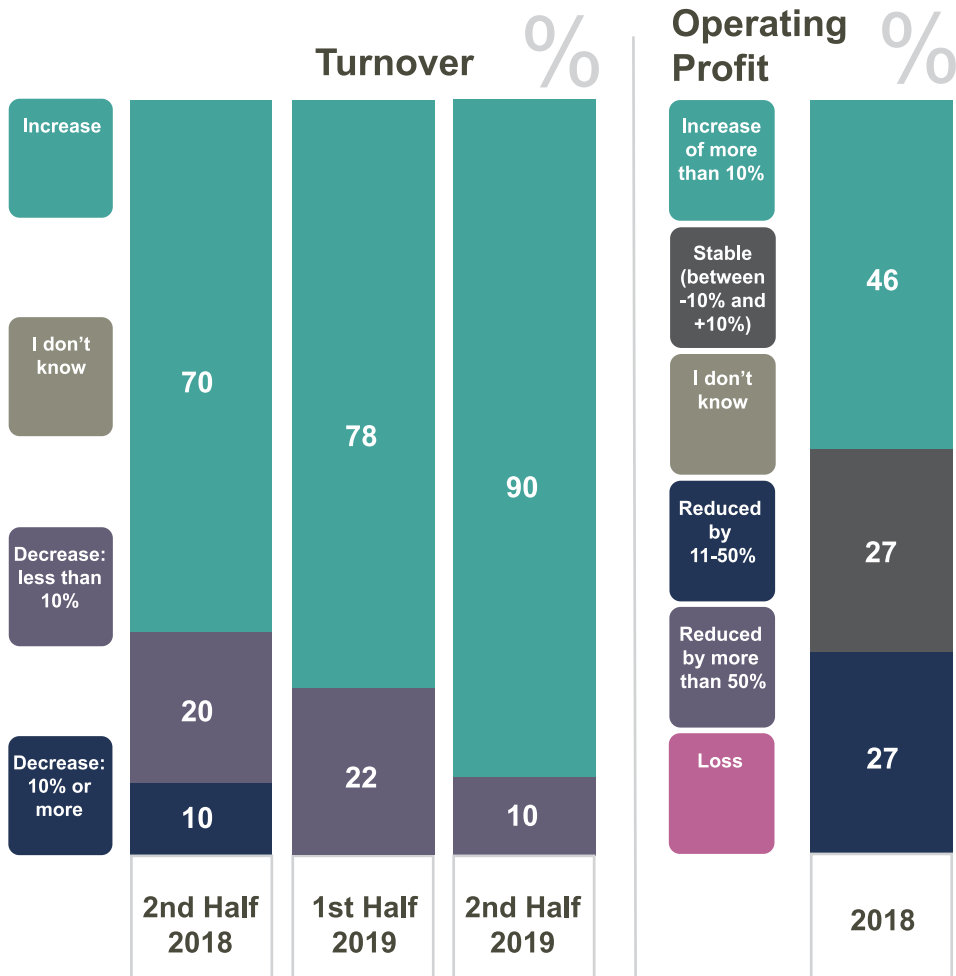
Global



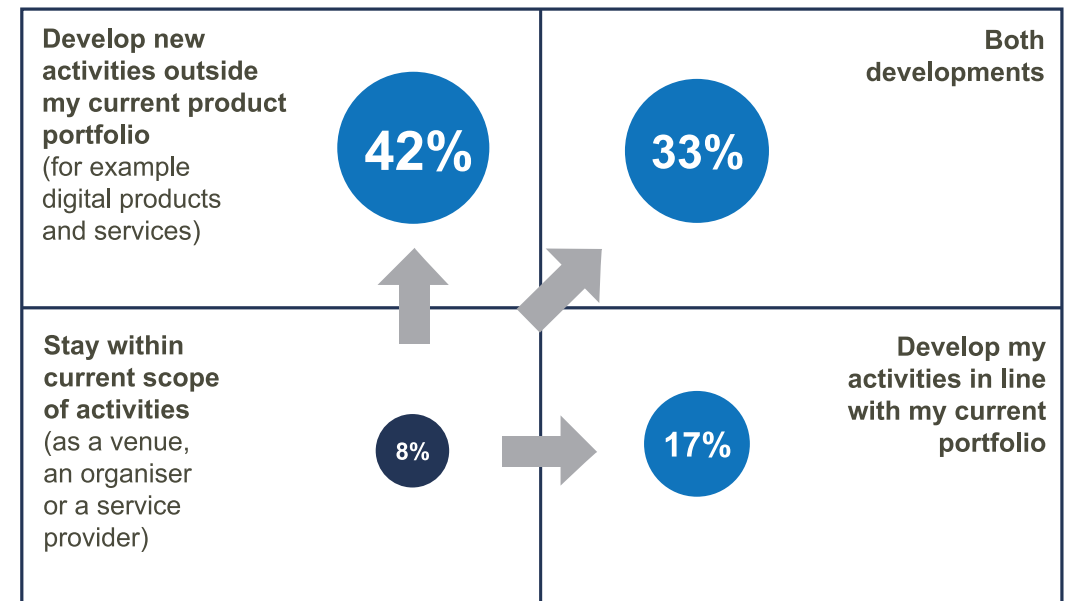
Detailed results for Brazil



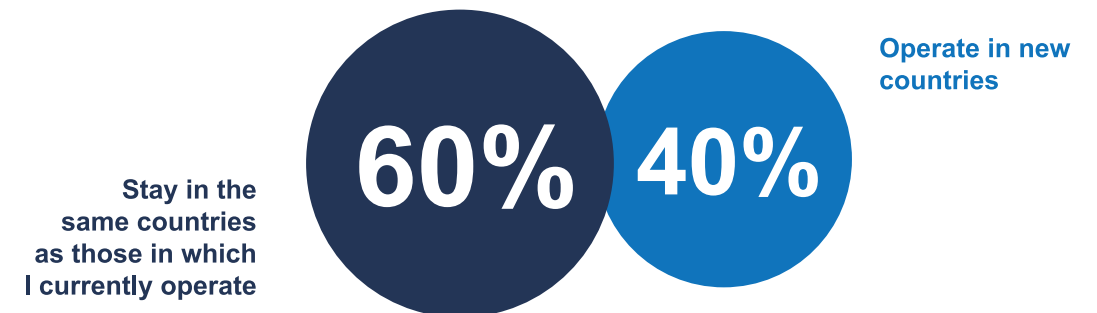
Financial expectations of Brazilian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

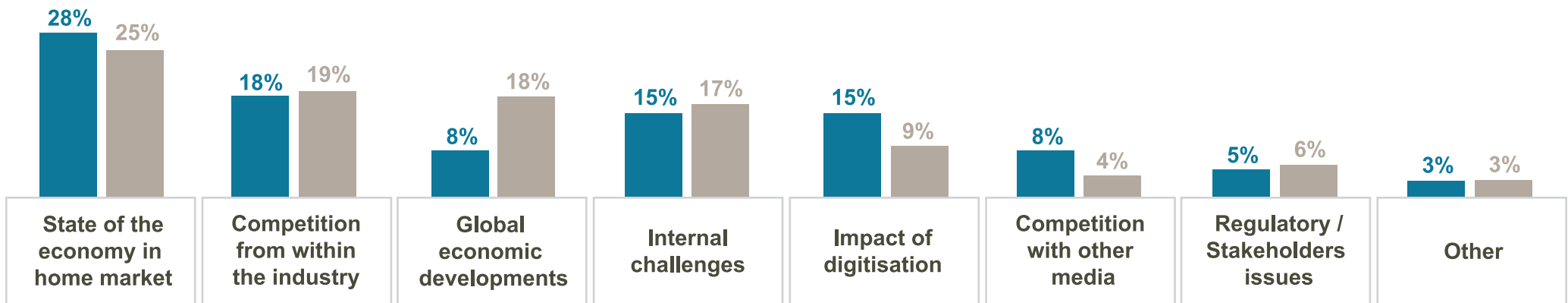


Detailed results for Brazil



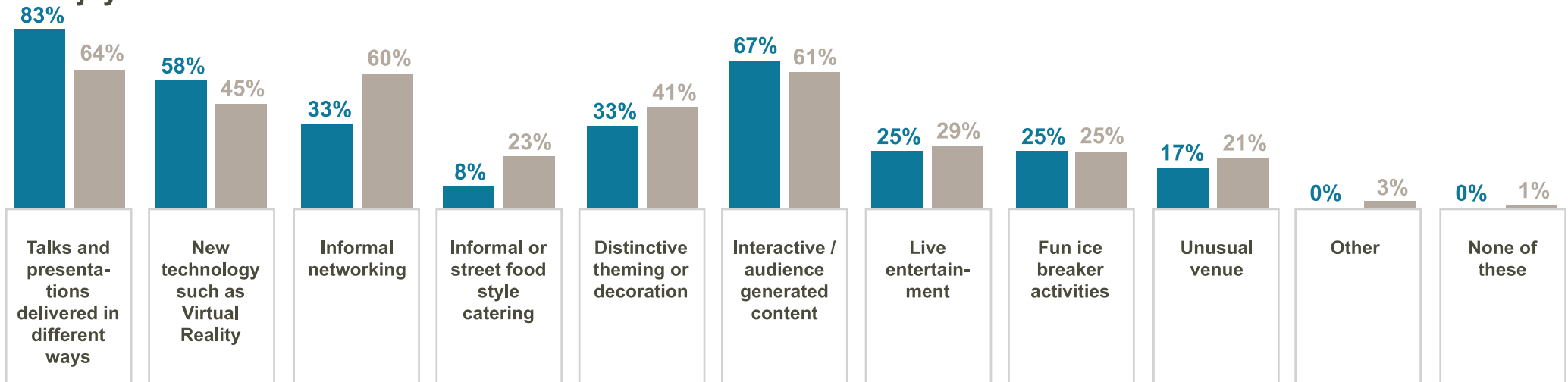
Most important business issues in the exhibition industry in Brazil and globally

Brazil Global



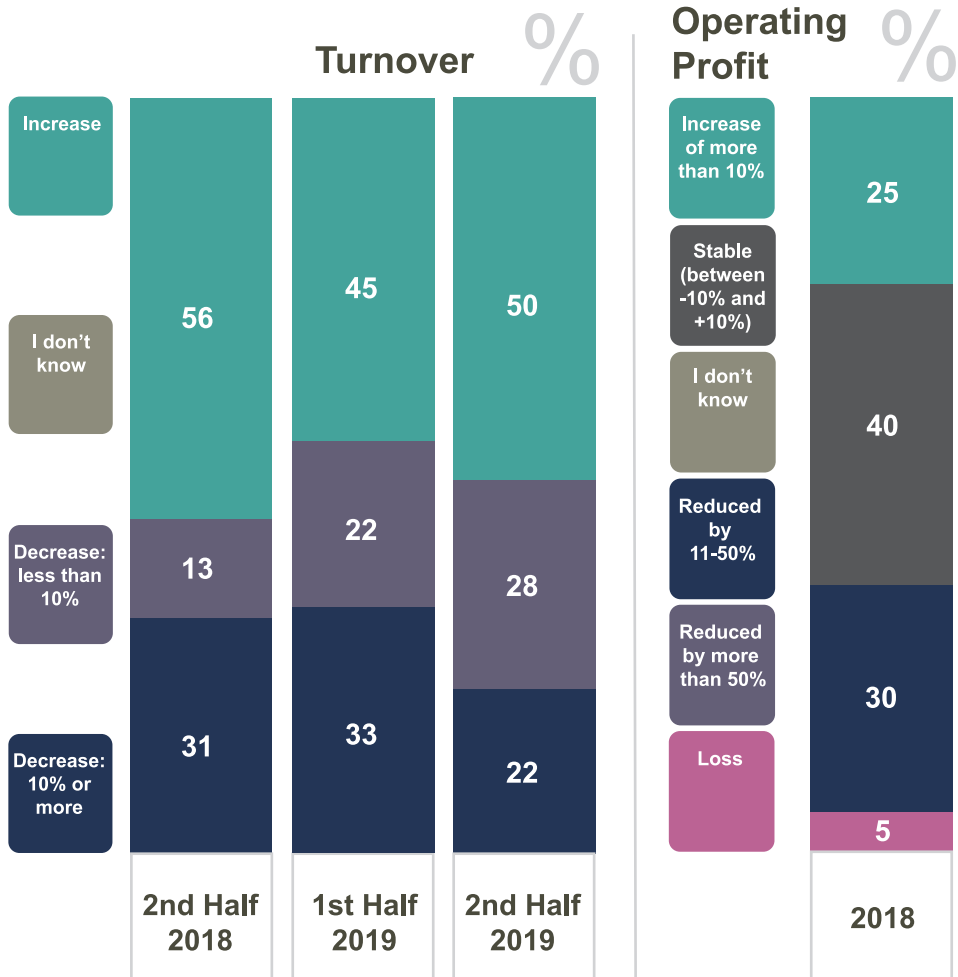
Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Brazil Global

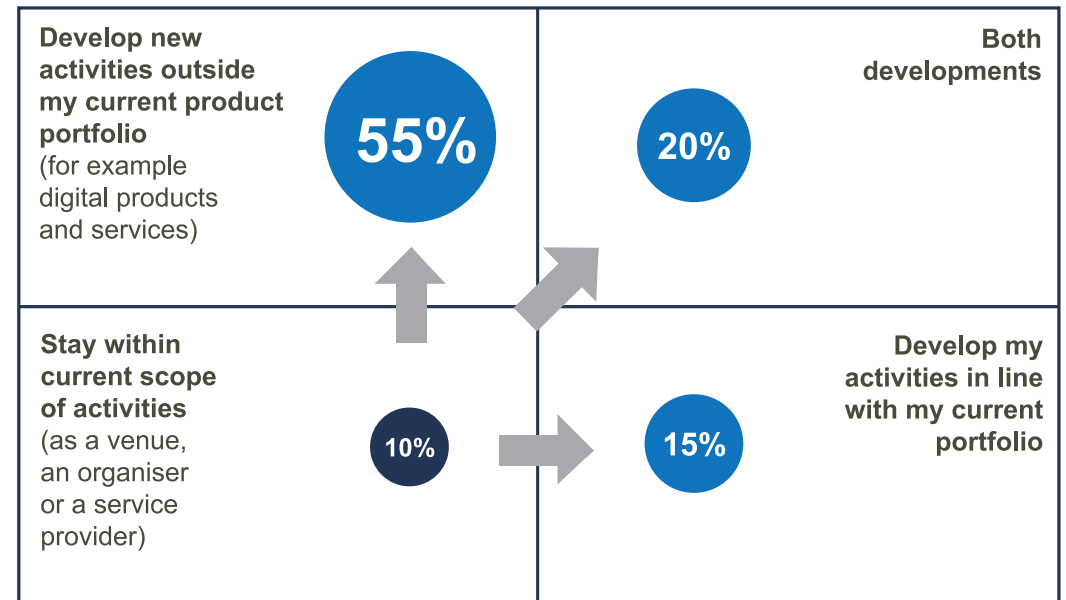


Detailed results for other countries in CSA

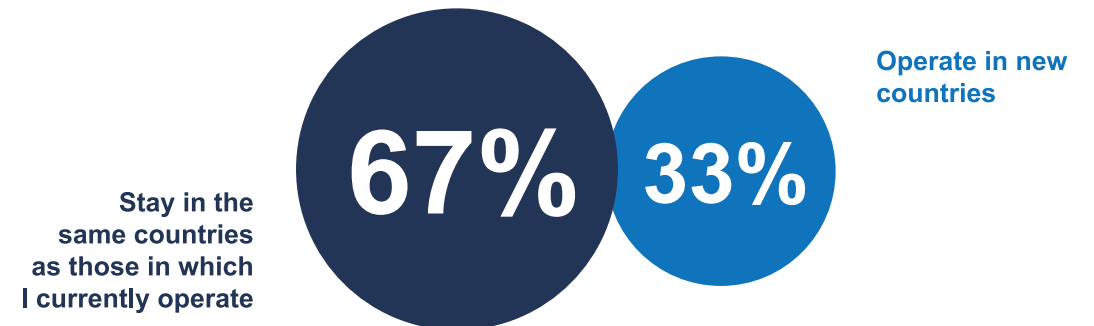
Financial expectations of Others in CSA exhibition companies compared to previous years



Current strategic priorities related to the range of activities



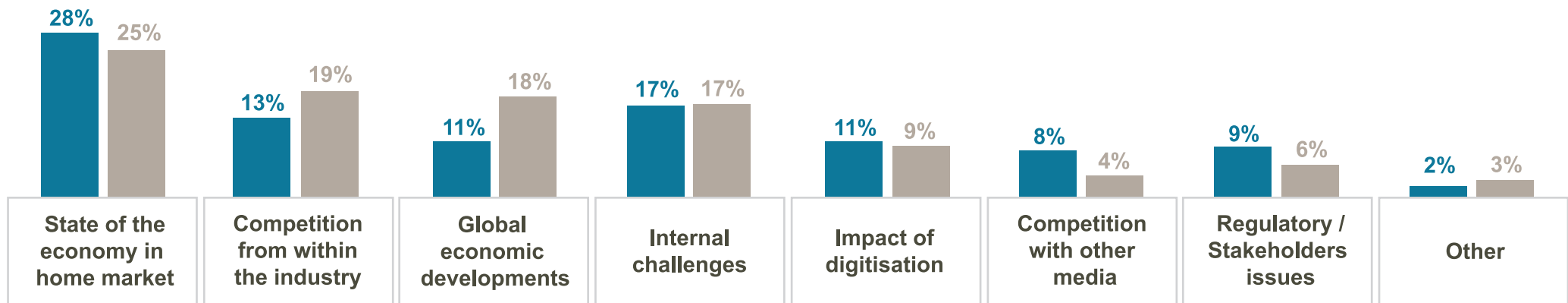
Current strategic priorities related to geographic exposure



Detailed results for other countries in CSA

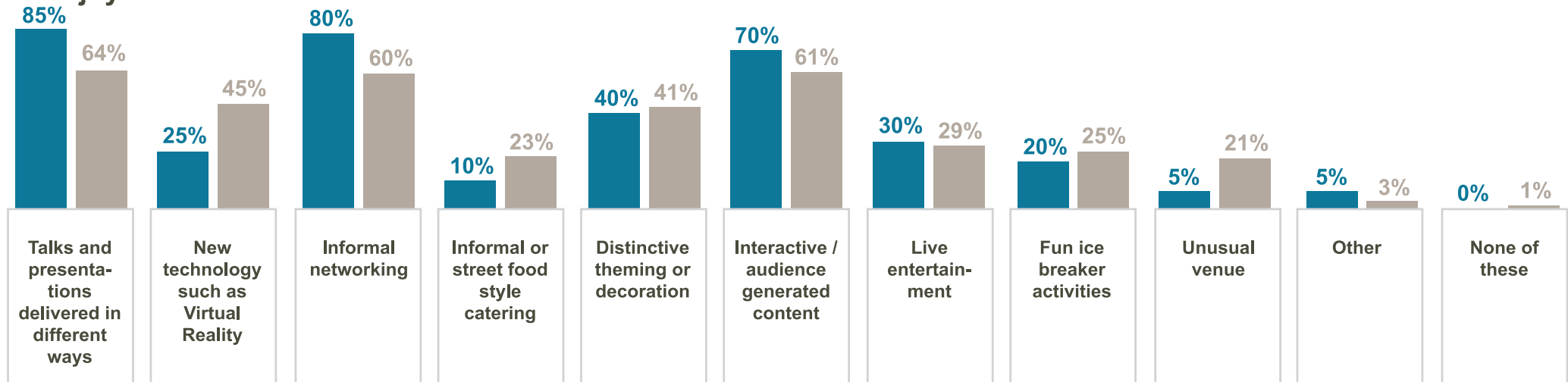
Most important business issues in the exhibition industry in Others in CSA and globally

Others in CSA Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

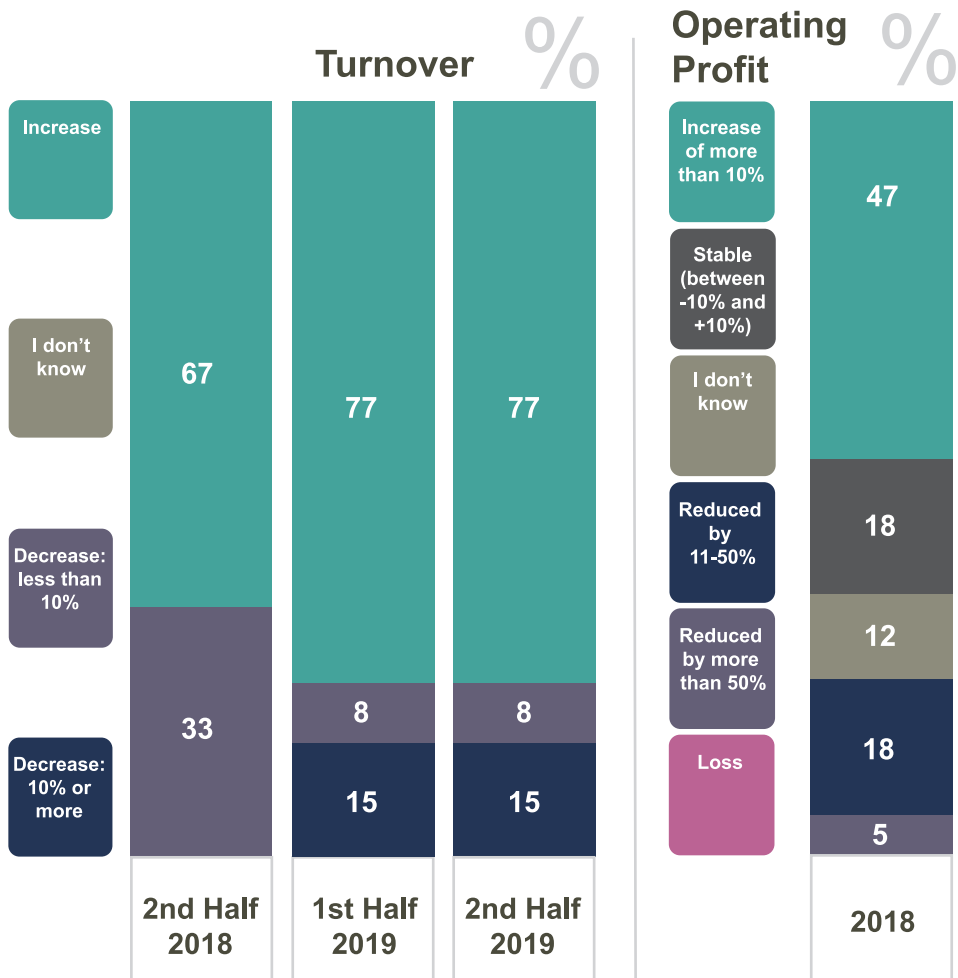
Others in CSA Global



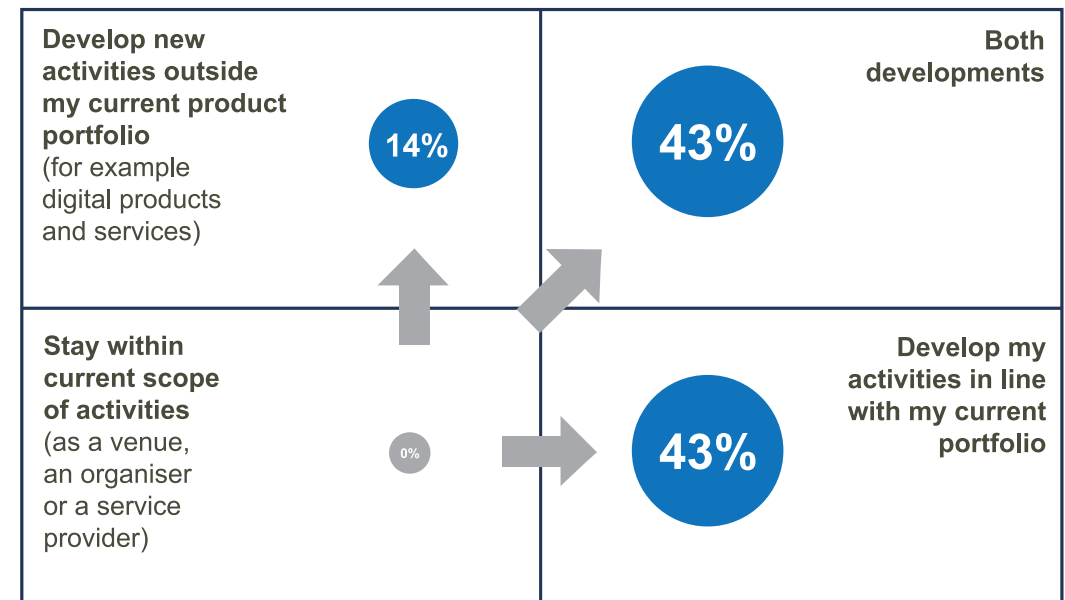
Detailed results for Germany



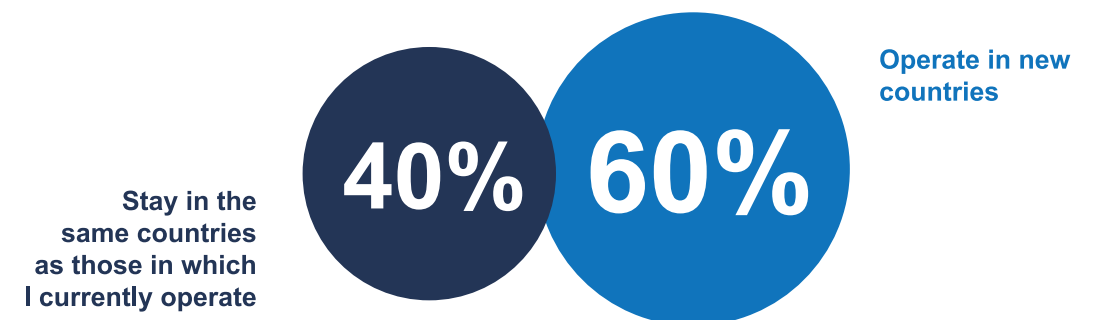
Financial expectations of German exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



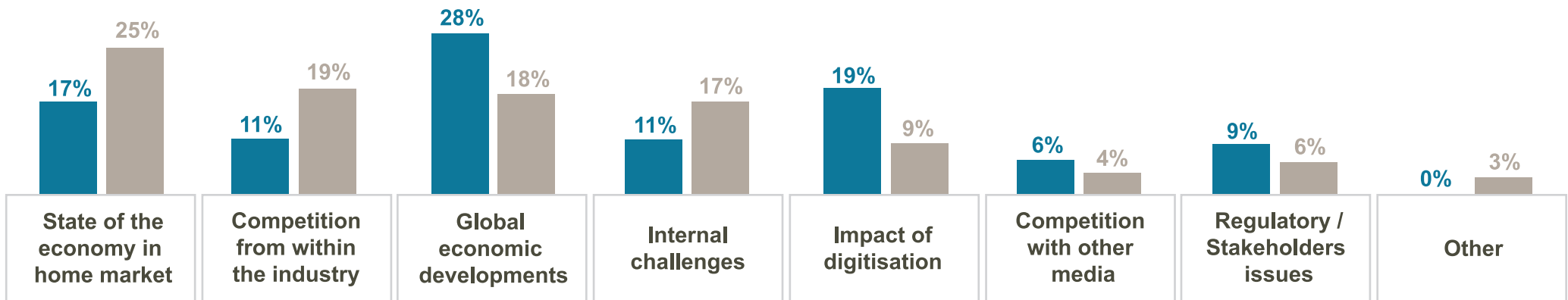
Detailed results for Germany



Most important business issues in the exhibition industry in Germany and globally

Germany

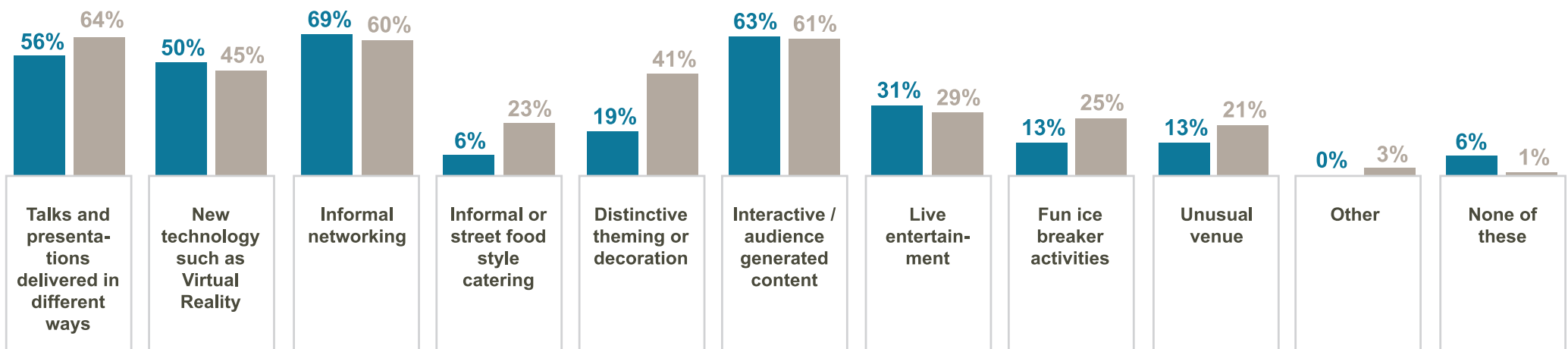
Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Germany

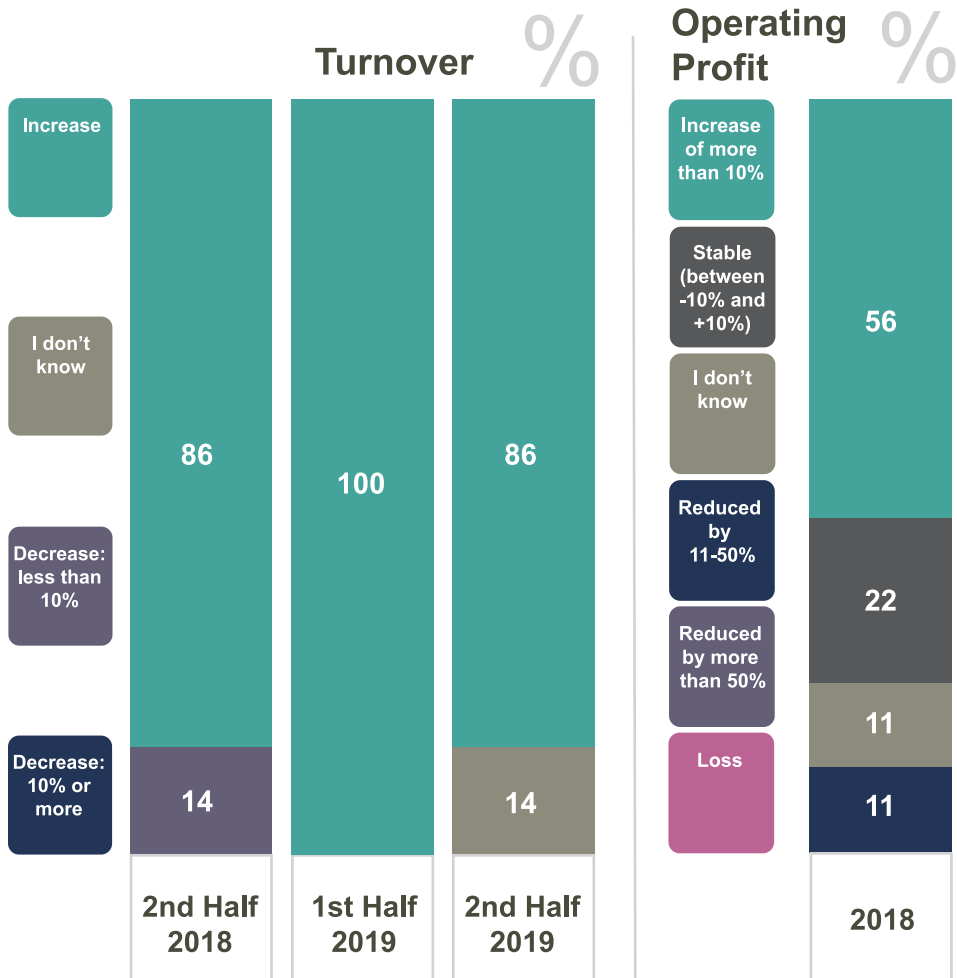
Global



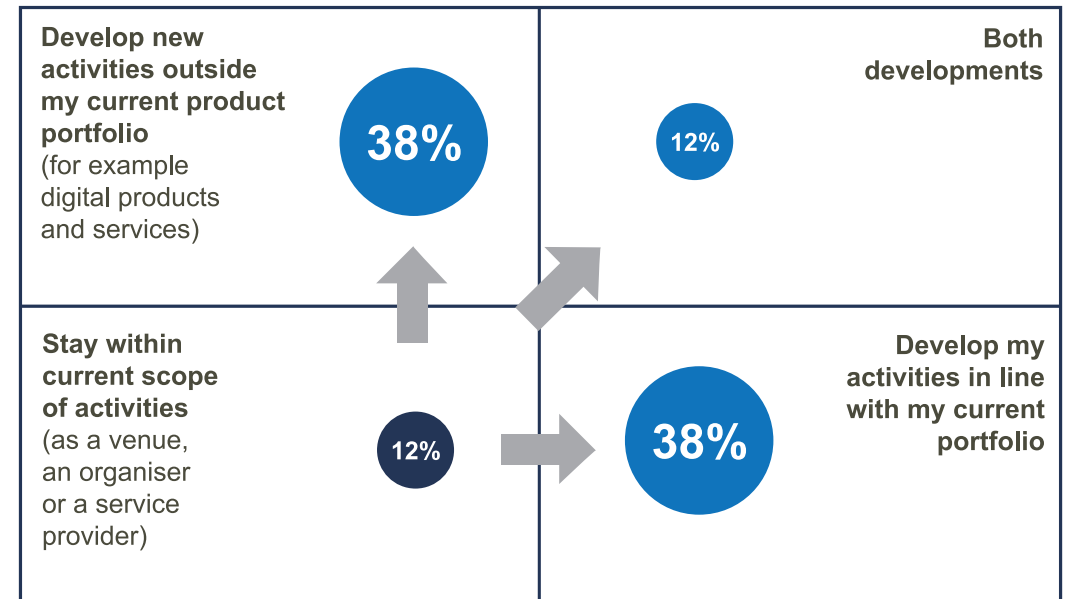
Detailed results for Italy



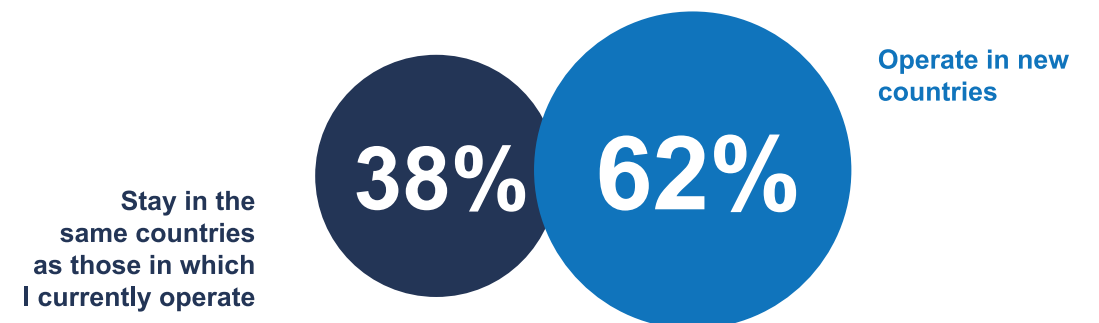
Financial expectations of Italian exhibition companies compared to previous years



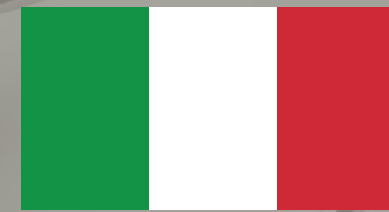
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

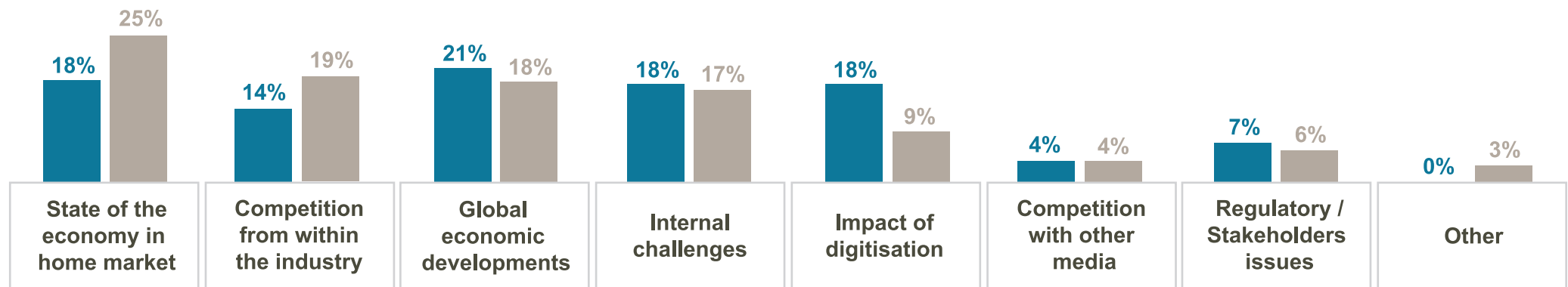


Detailed results for Italy



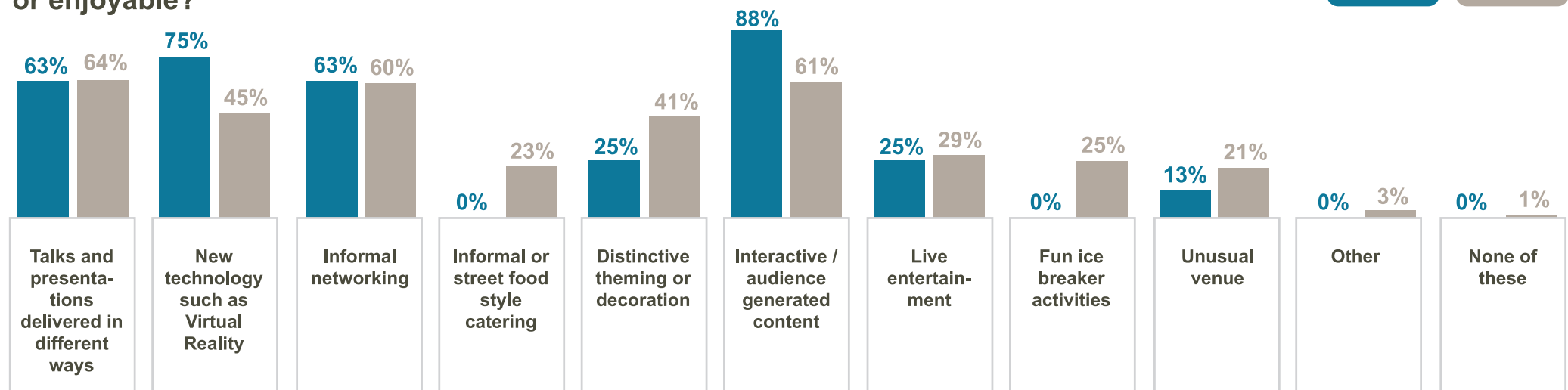
Most important business issues in the exhibition industry in Italy and globally

Italy Global

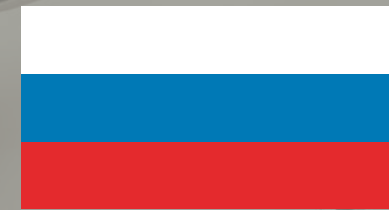


Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

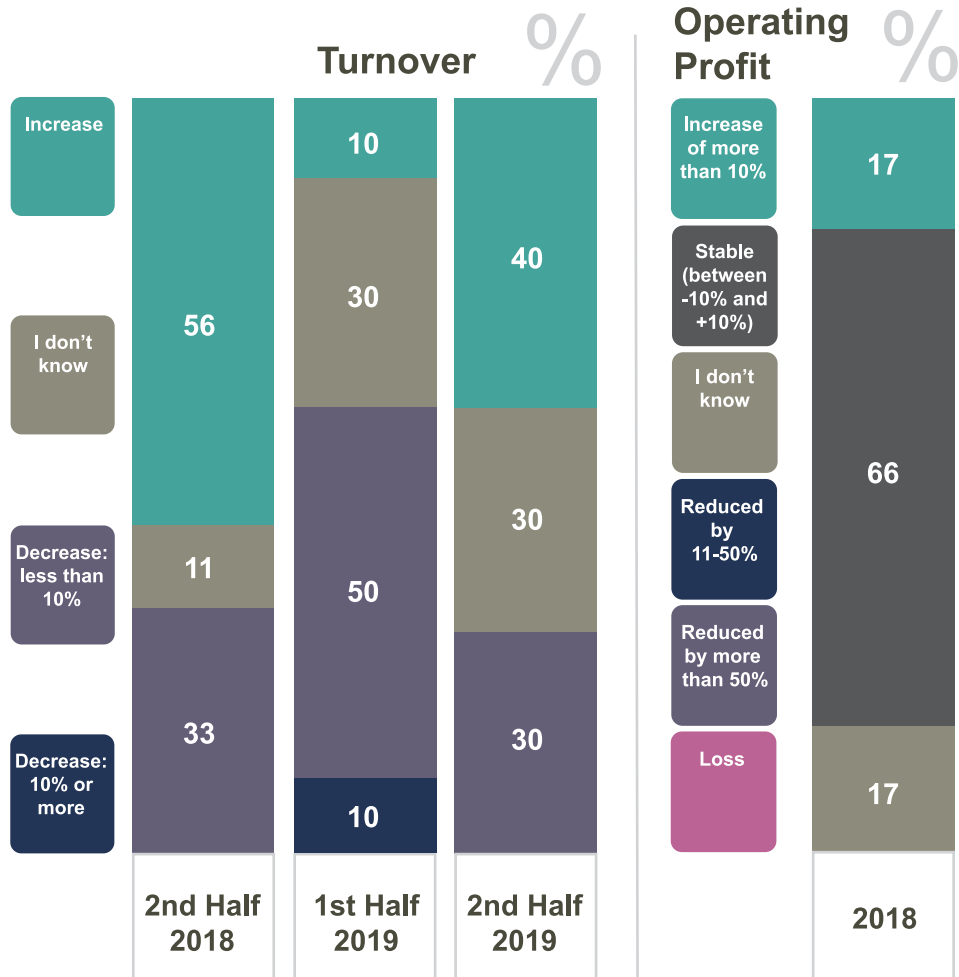
Italy Global



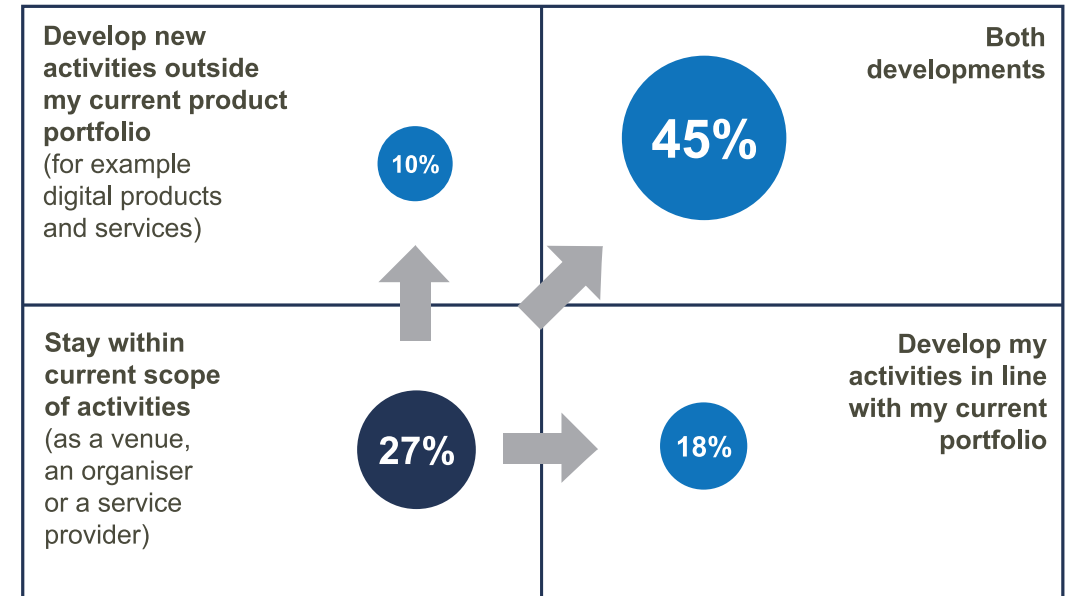
Detailed results for Russia



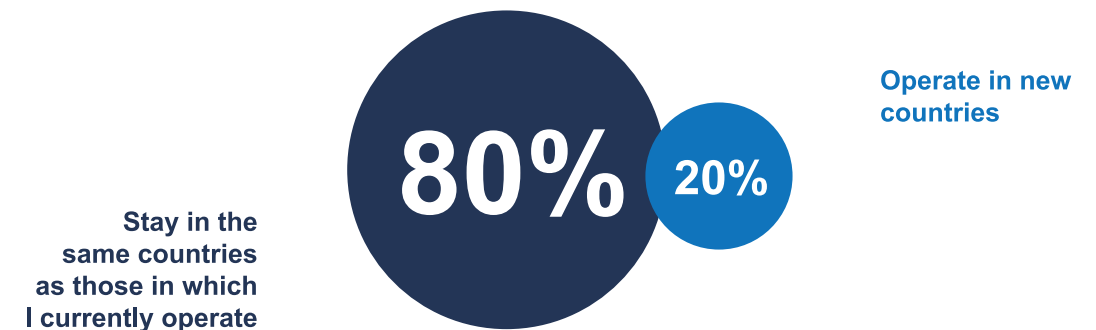
Financial expectations of Russian exhibition companies compared to previous years



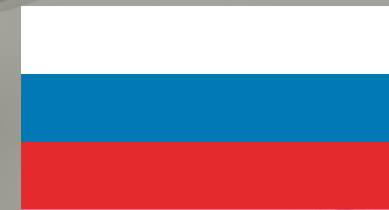
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



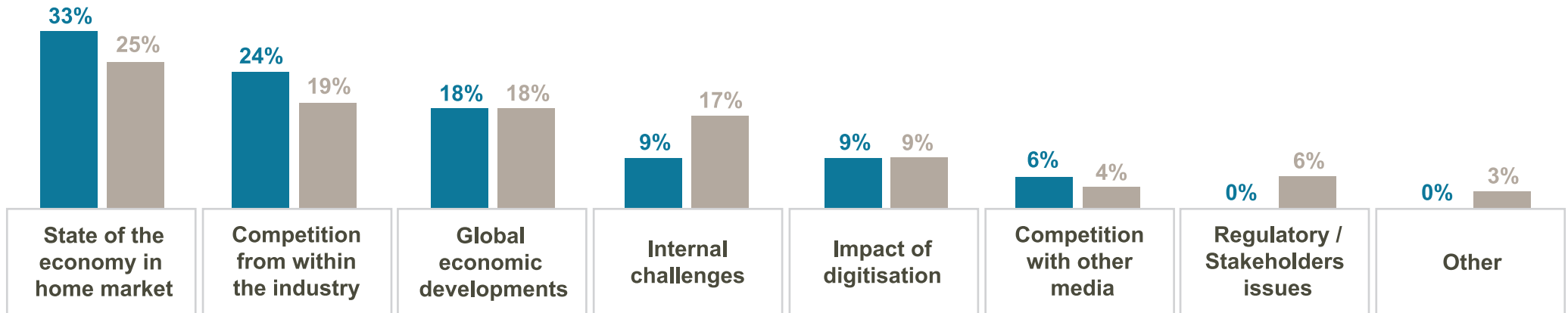
Detailed results for Russia



Most important business issues in the exhibition industry in Russia and globally

Russia

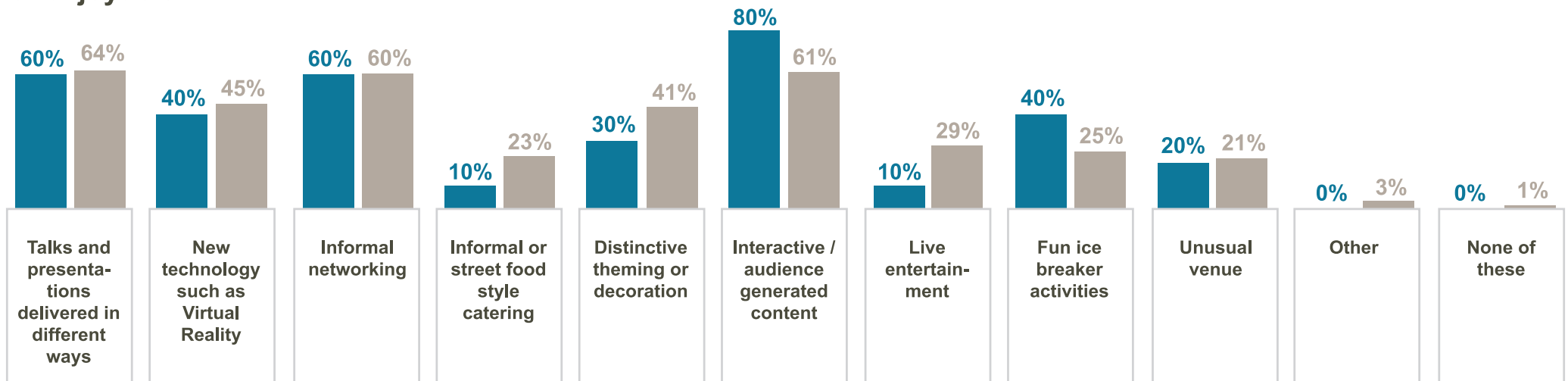
Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

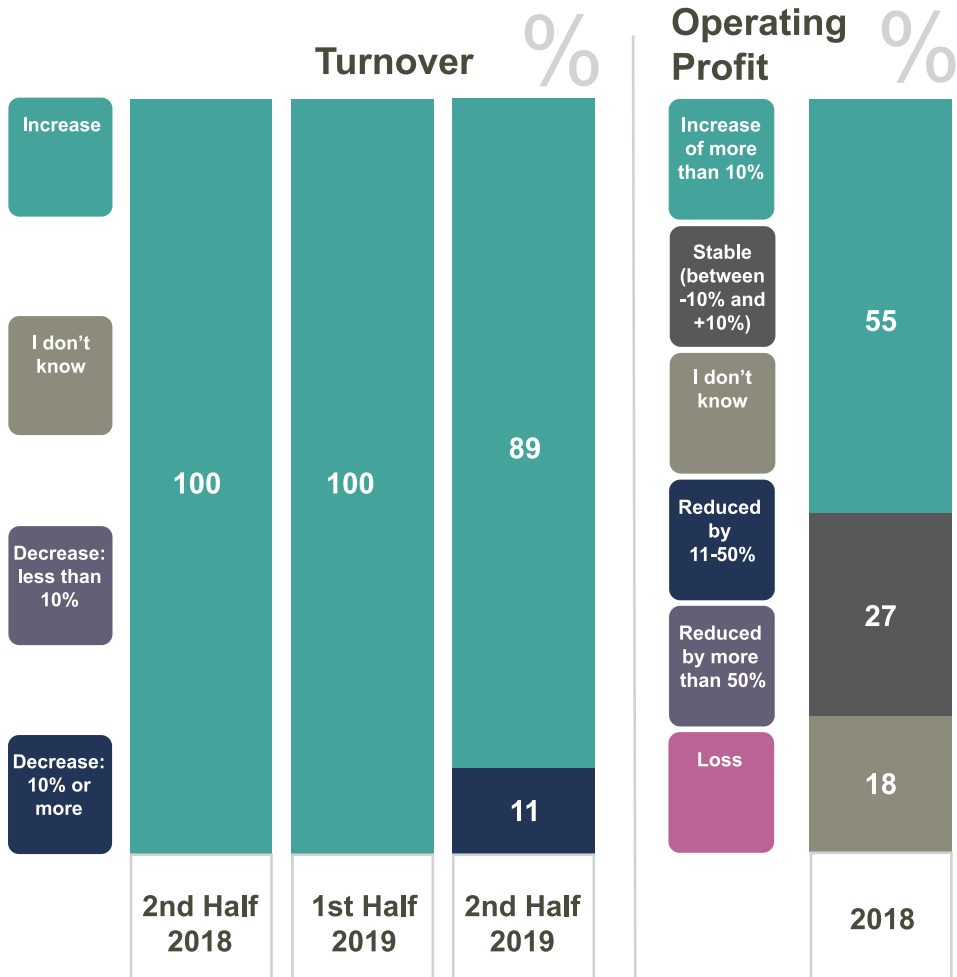
Russia

Global

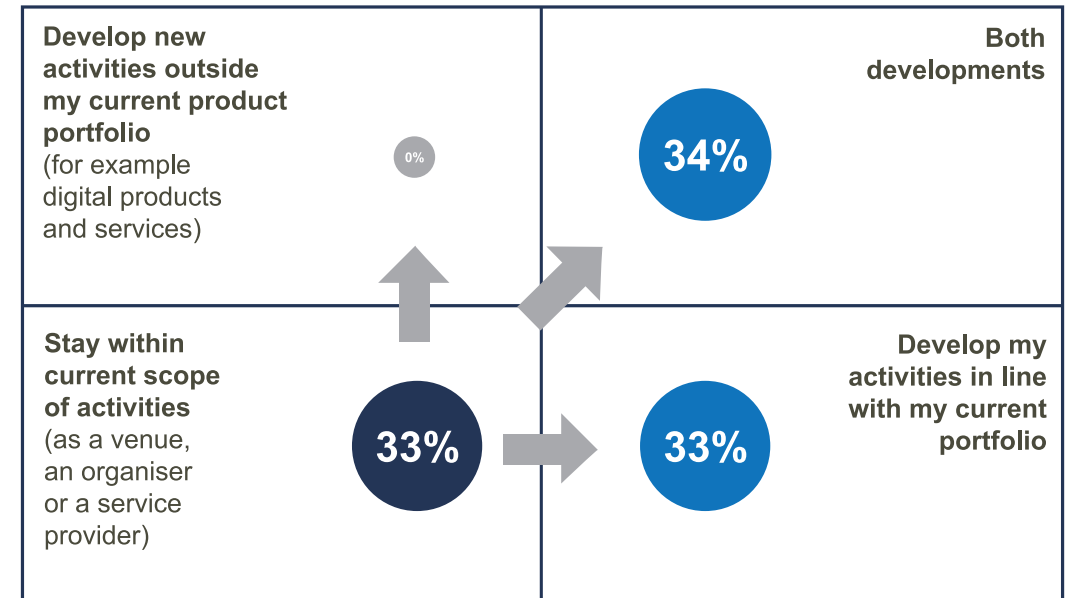




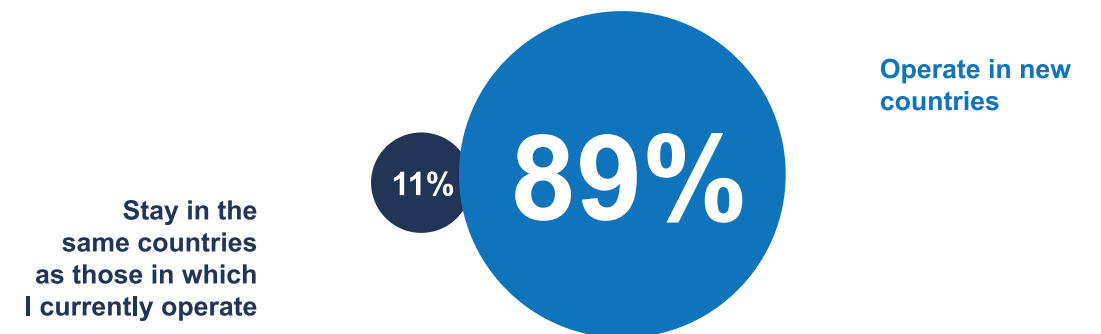
Financial expectations of UK exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

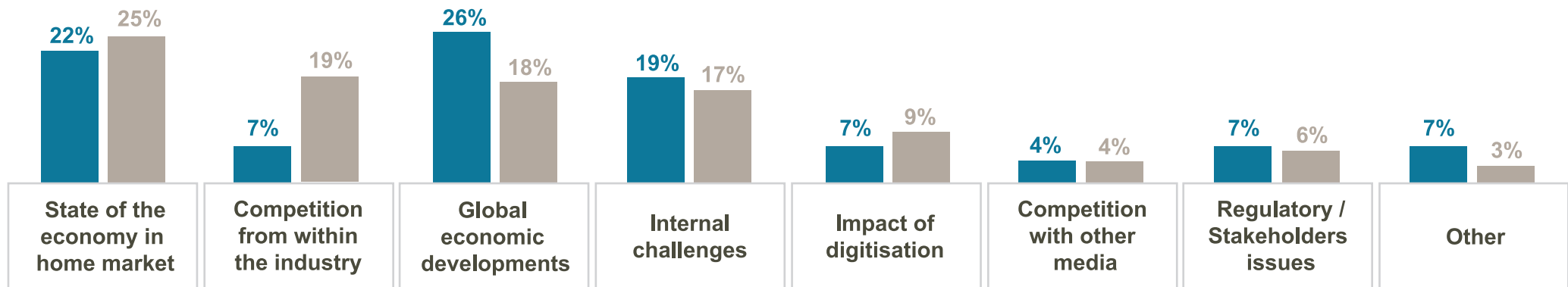




Most important business issues in the exhibition industry in the UK and globally

UK

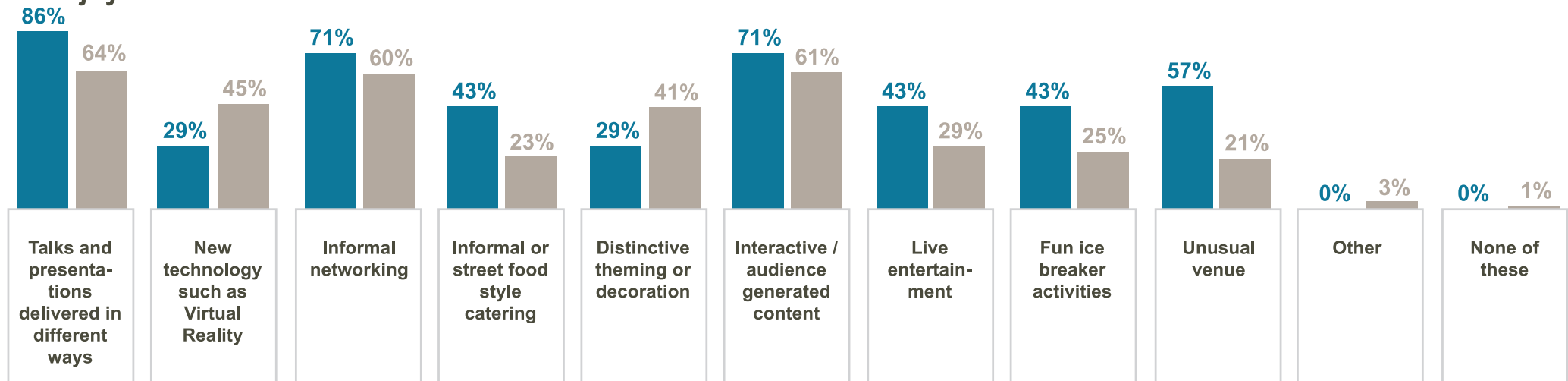
Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

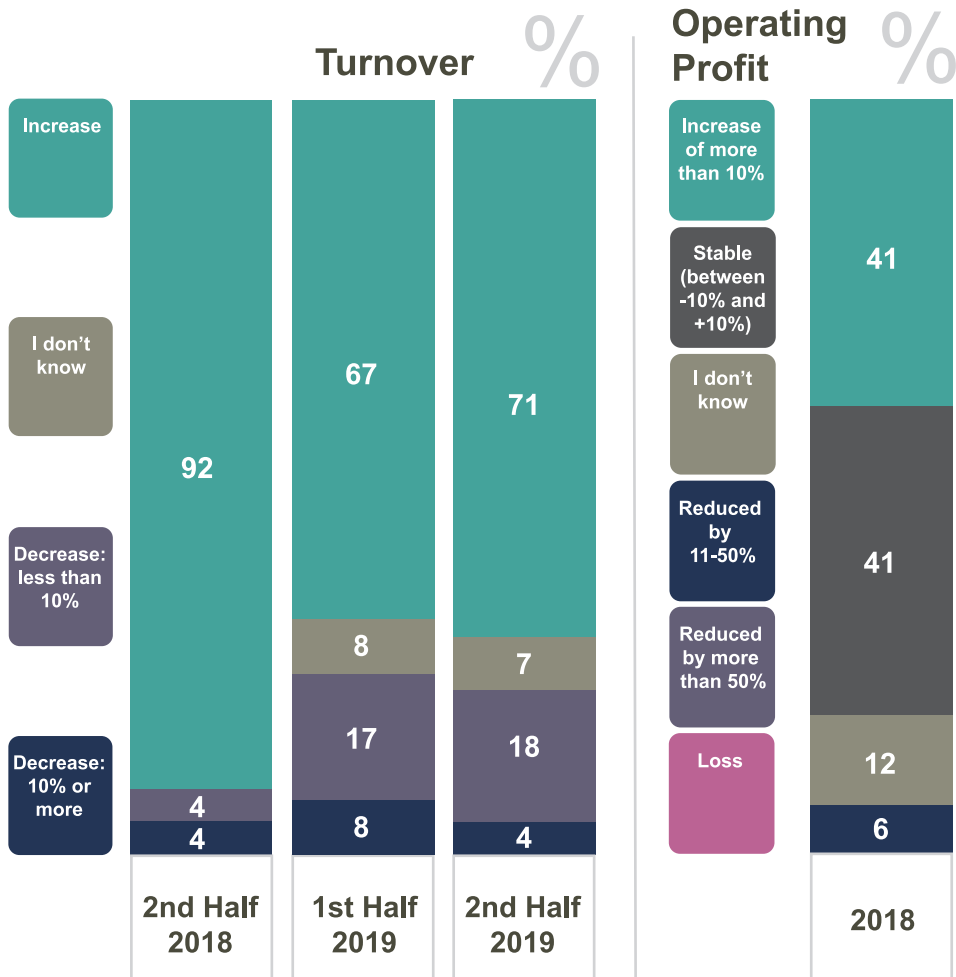
UK

Global

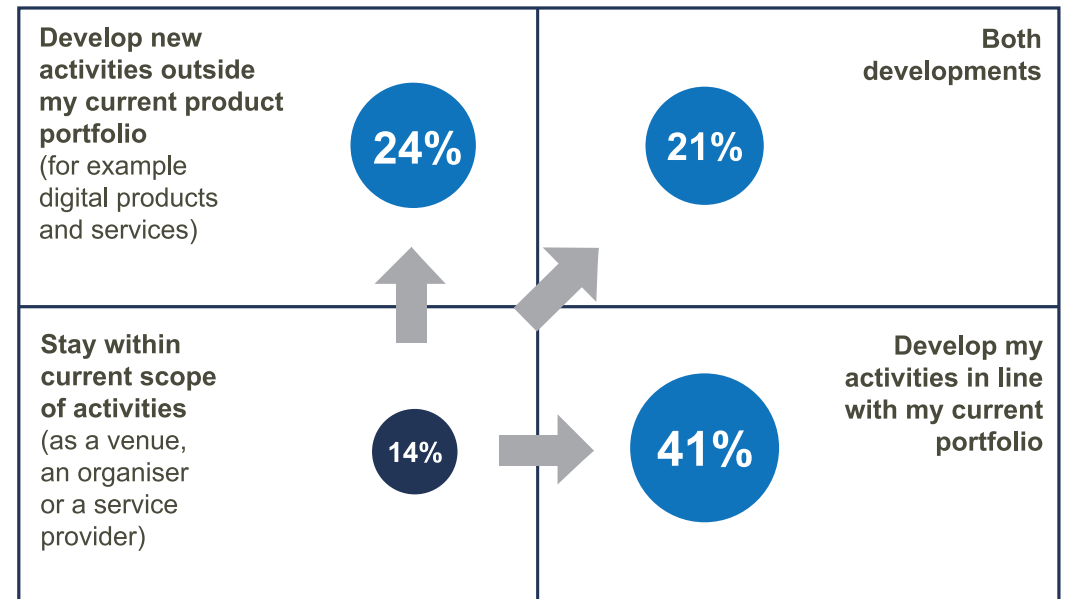


Detailed results for other countries in Europe

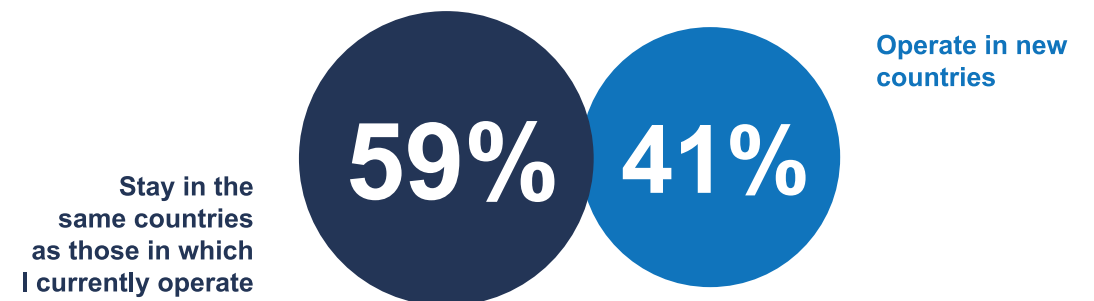
Financial expectations of Other Countries in Europe exhibition companies compared to previous years



Current strategic priorities related to the range of activities



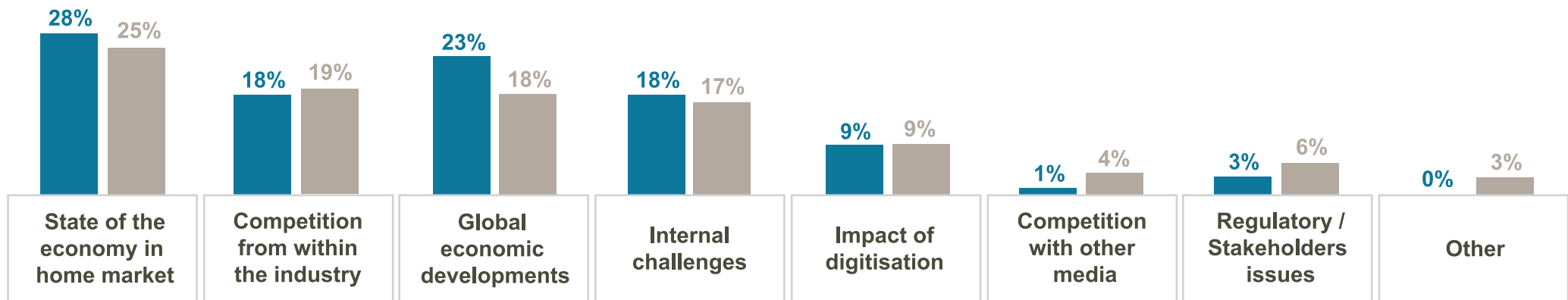
Current strategic priorities related to geographic exposure



Detailed results for other countries in Europe

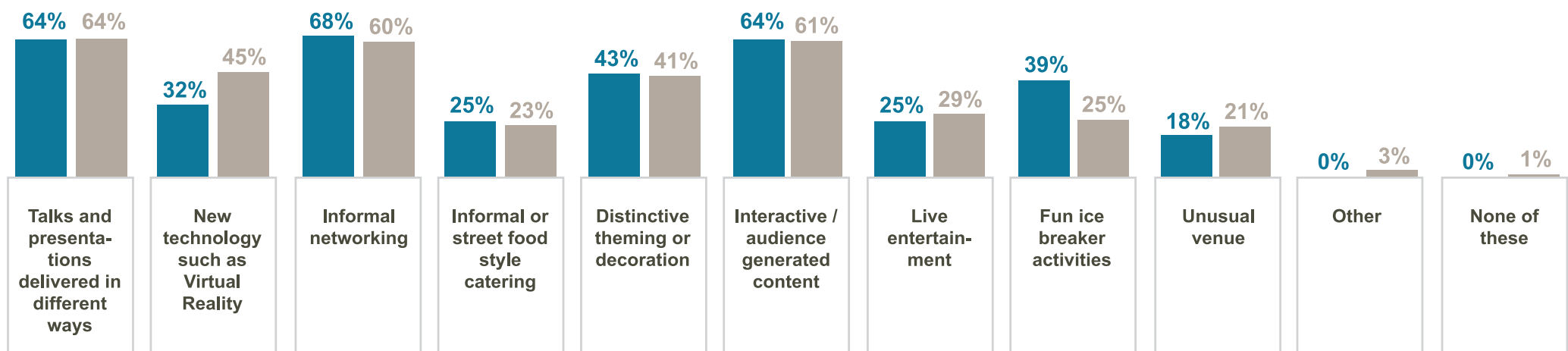
Most important business issues in the exhibition industry in Other Countries in Europe and globally

Rest of EUR Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

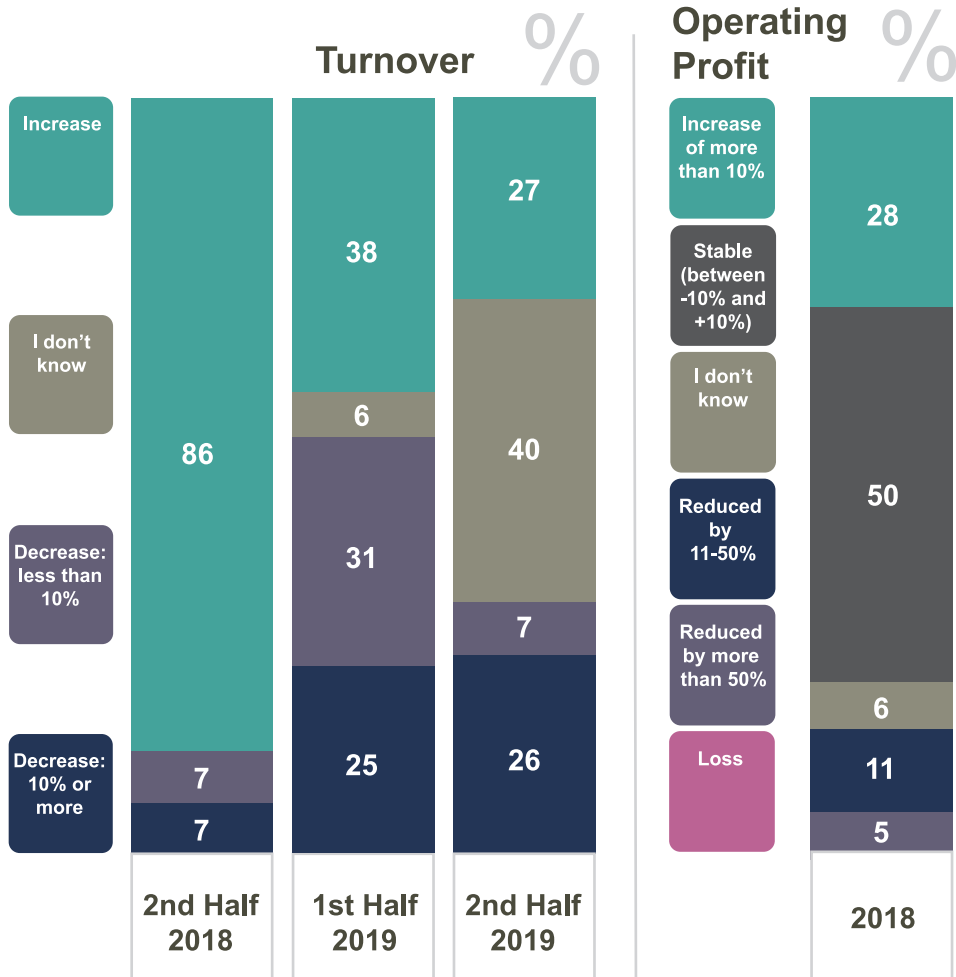
Rest of EUR Global



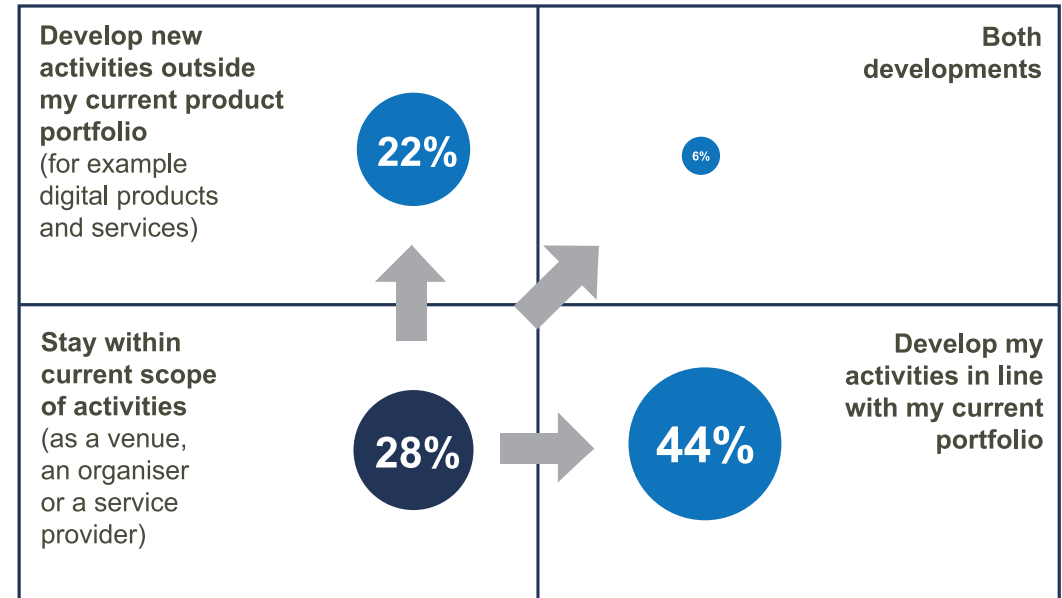
Detailed results for South Africa



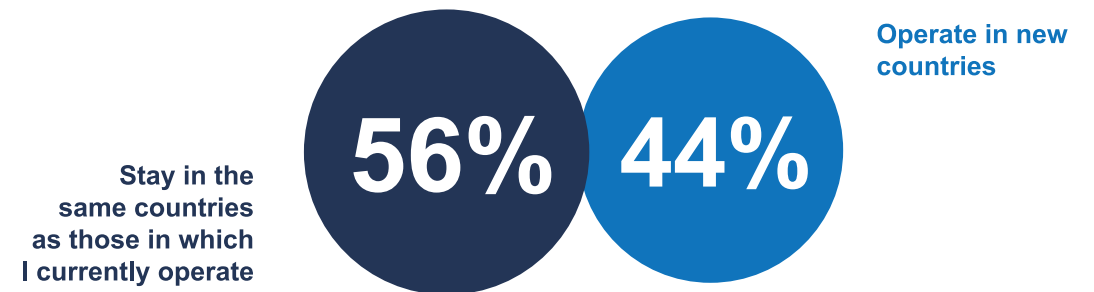
Financial expectations of South African exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

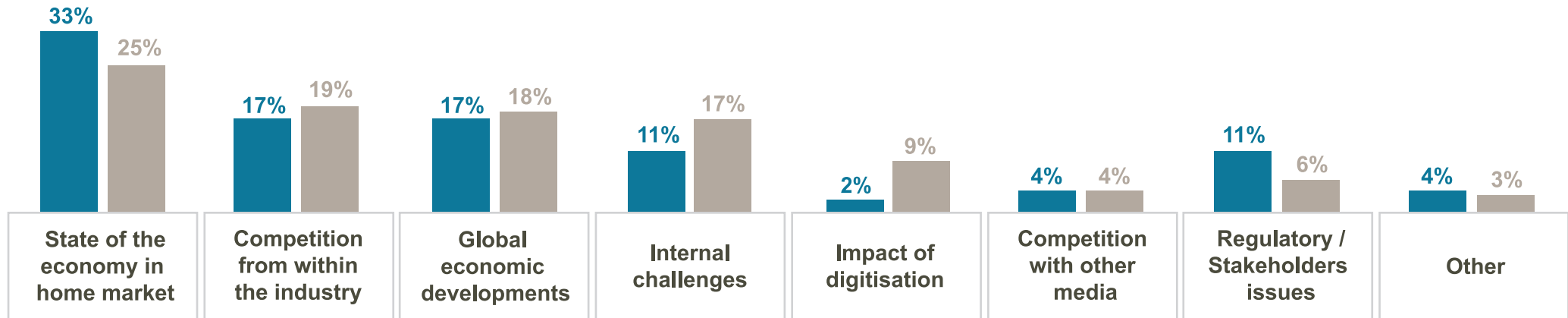


Detailed results for South Africa



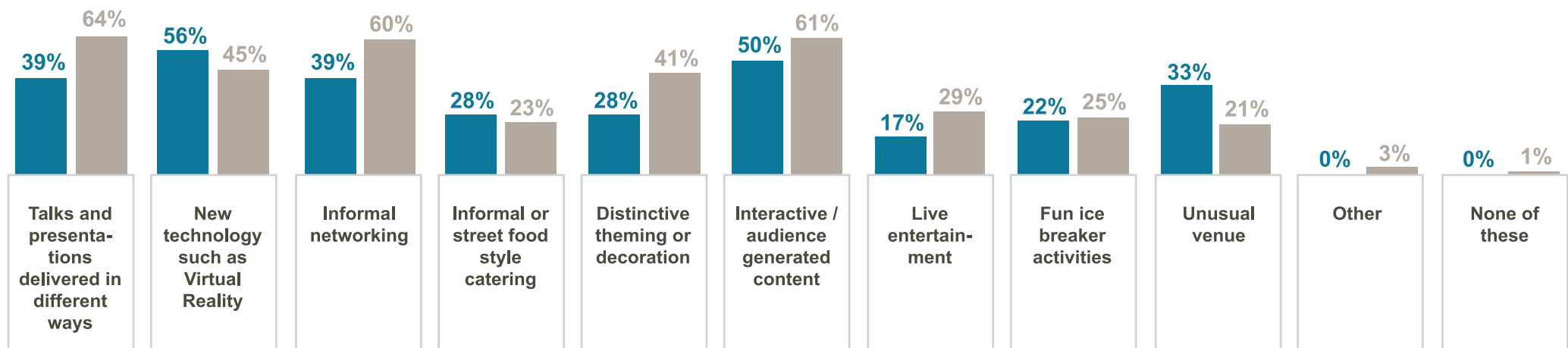
Most important business issues in the exhibition industry in South Africa and globally

South Africa Global

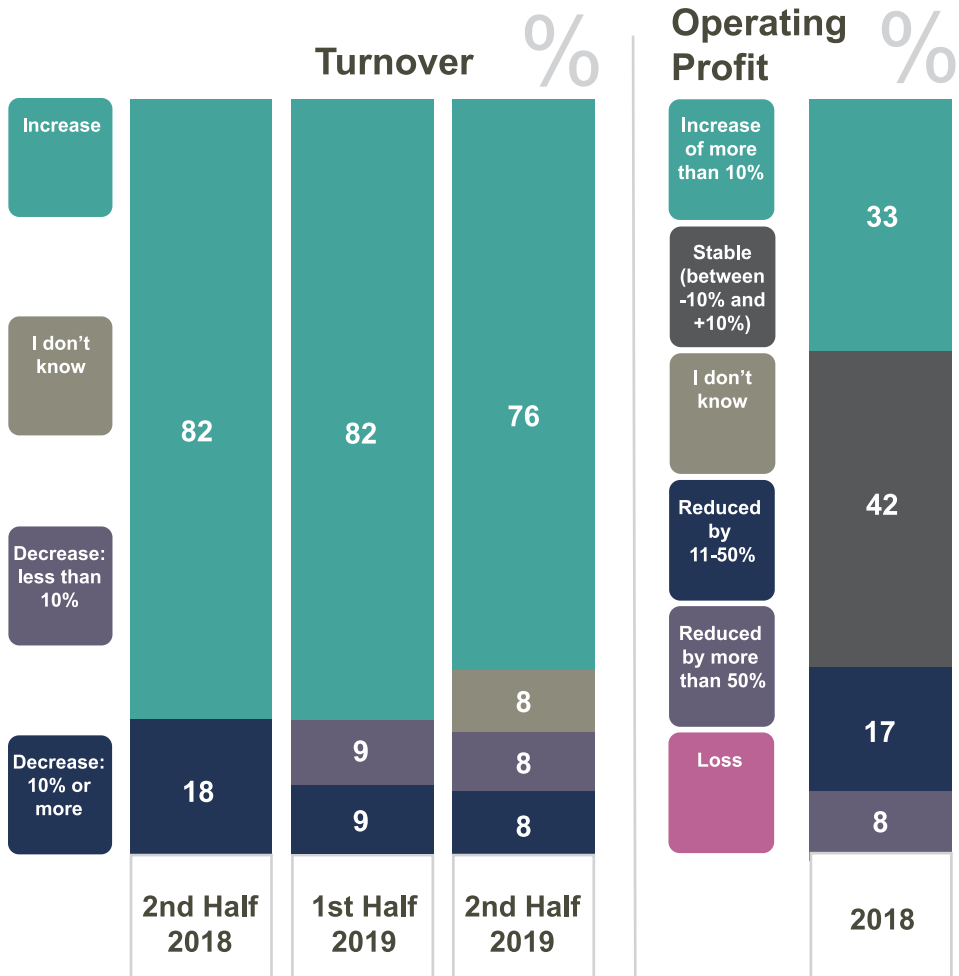


Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

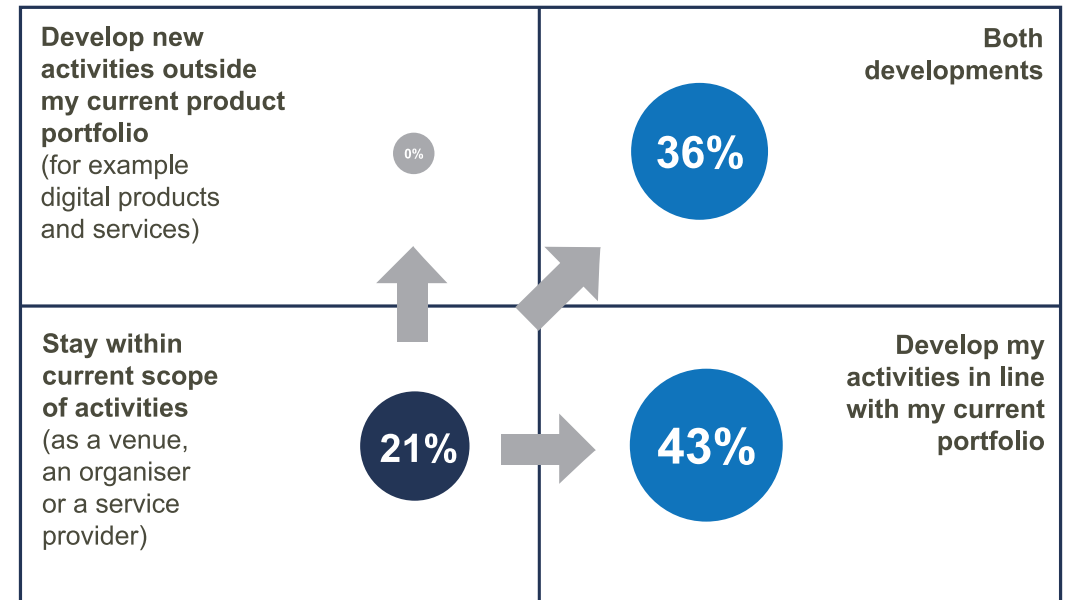
South Africa Global



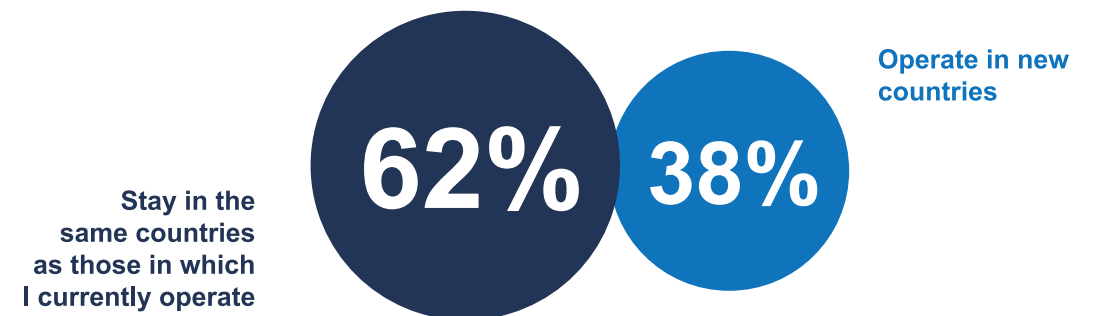
Financial expectations of Middle Eastern exhibition companies compared to previous years



Current strategic priorities related to the range of activities



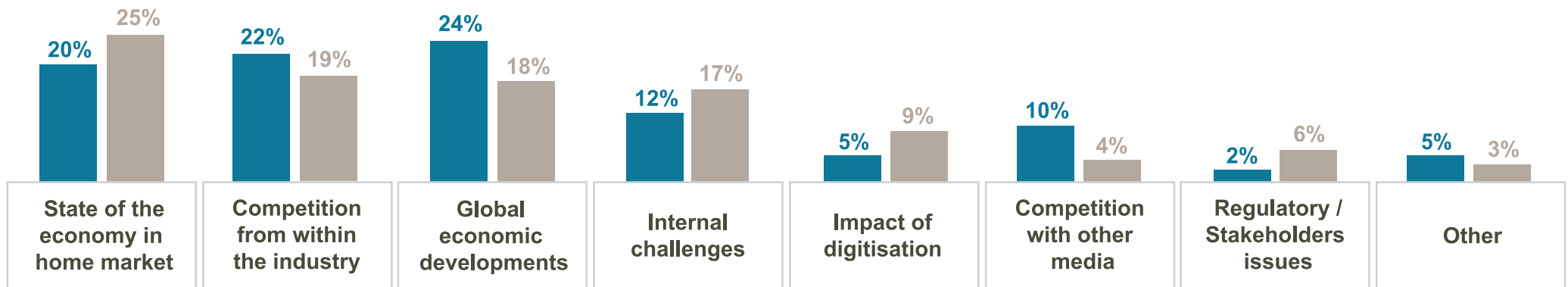
Current strategic priorities related to geographic exposure



Detailed results the Middle East

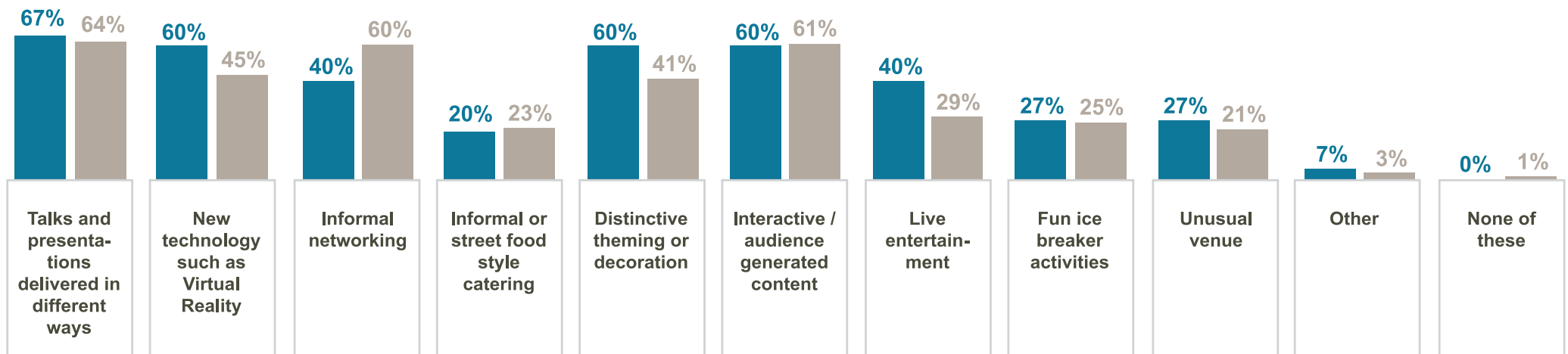
Most important business issues in the exhibition industry in the Middle East and globally

Middle East
Global



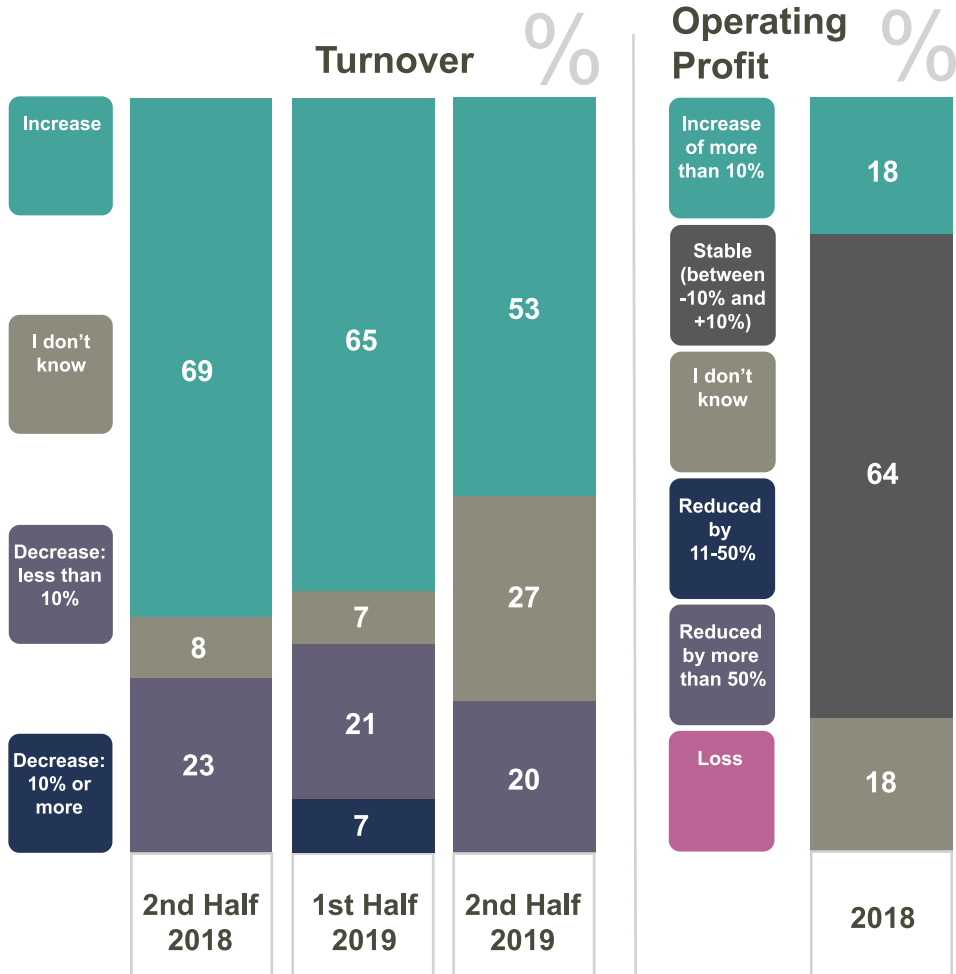
Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Middle East
Global

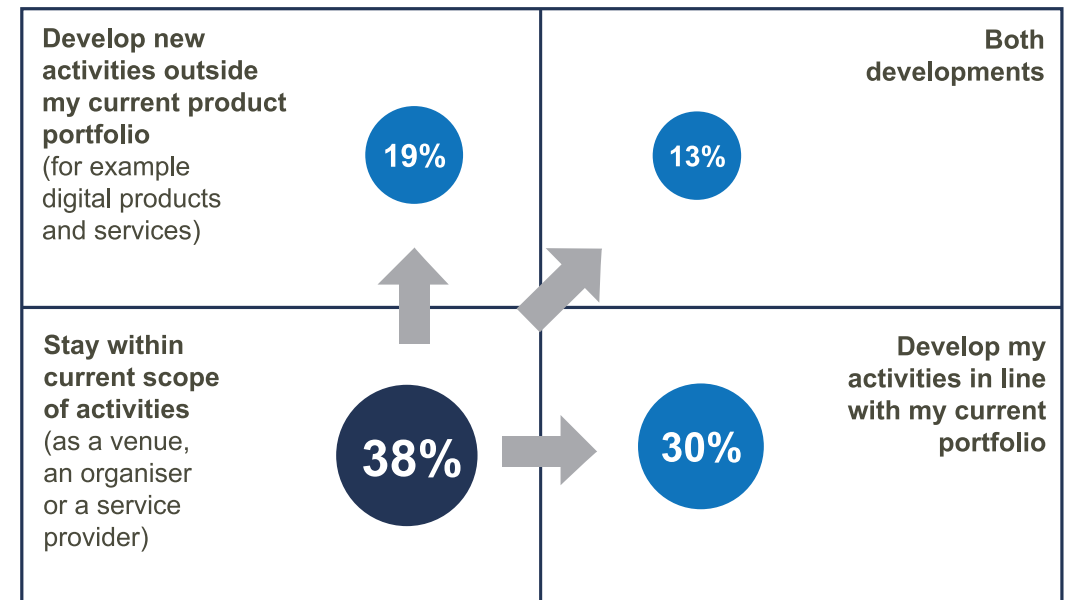




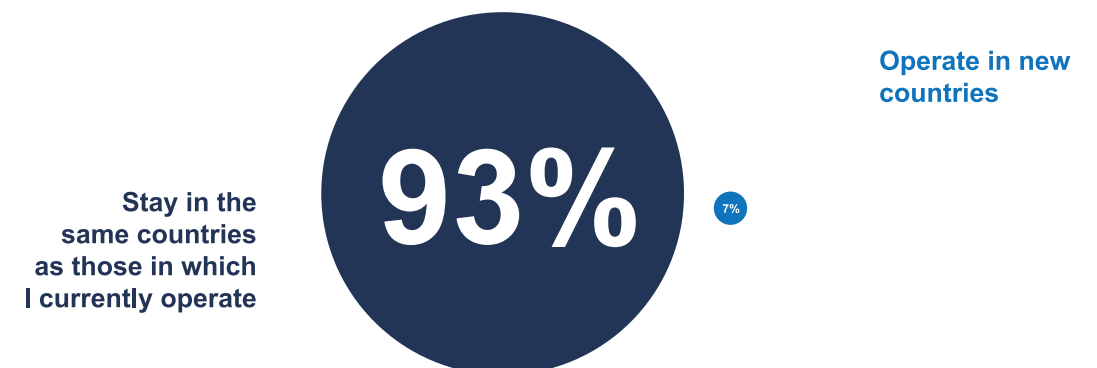
Financial expectations of Australian exhibition companies compared to previous years



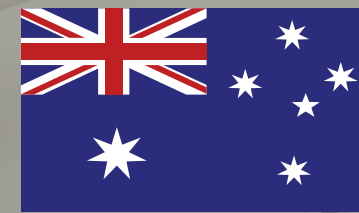
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

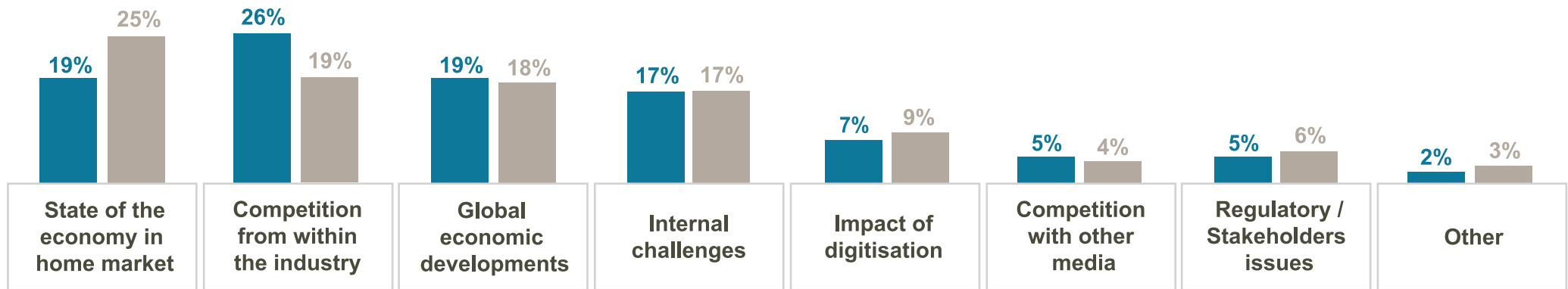


Detailed results Australia



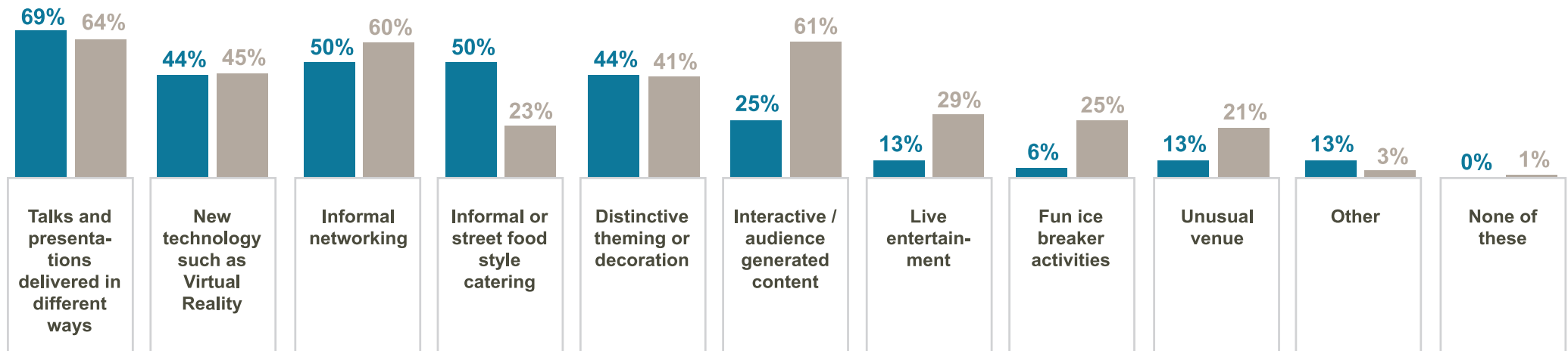
Most important business issues in the exhibition industry in Australia and globally

Australia Global



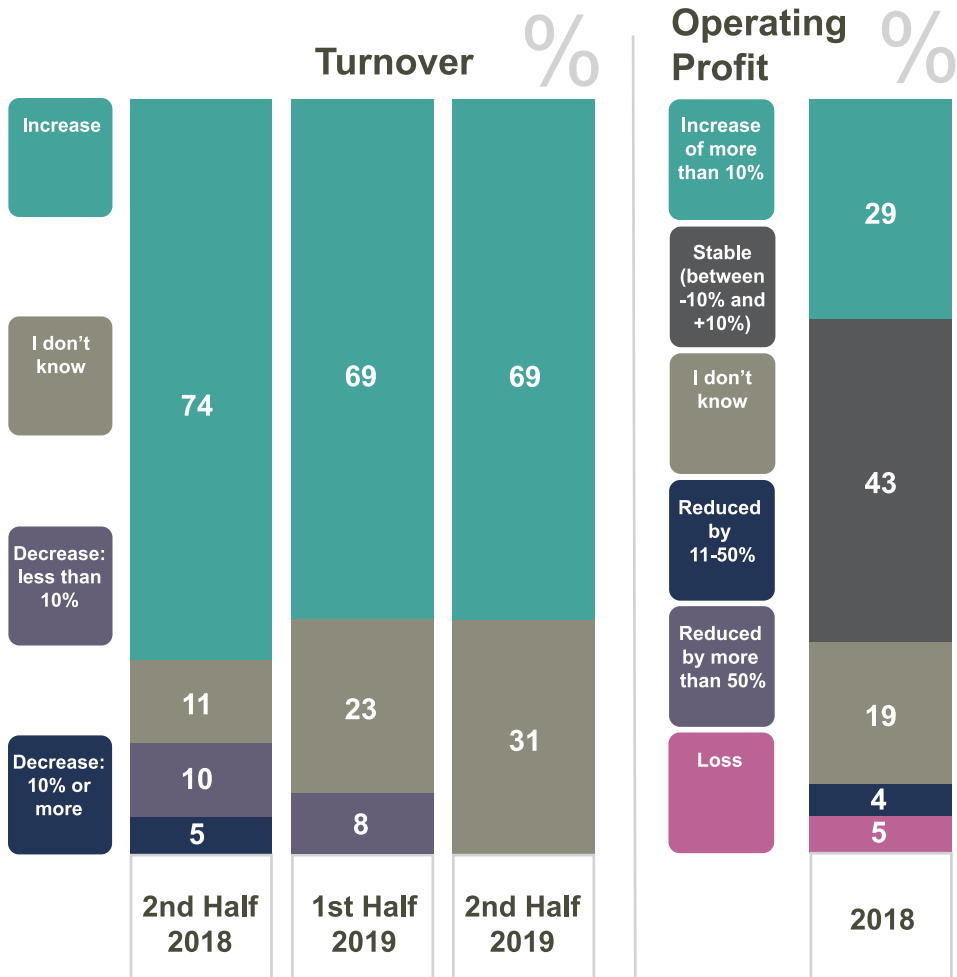
Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Australia Global

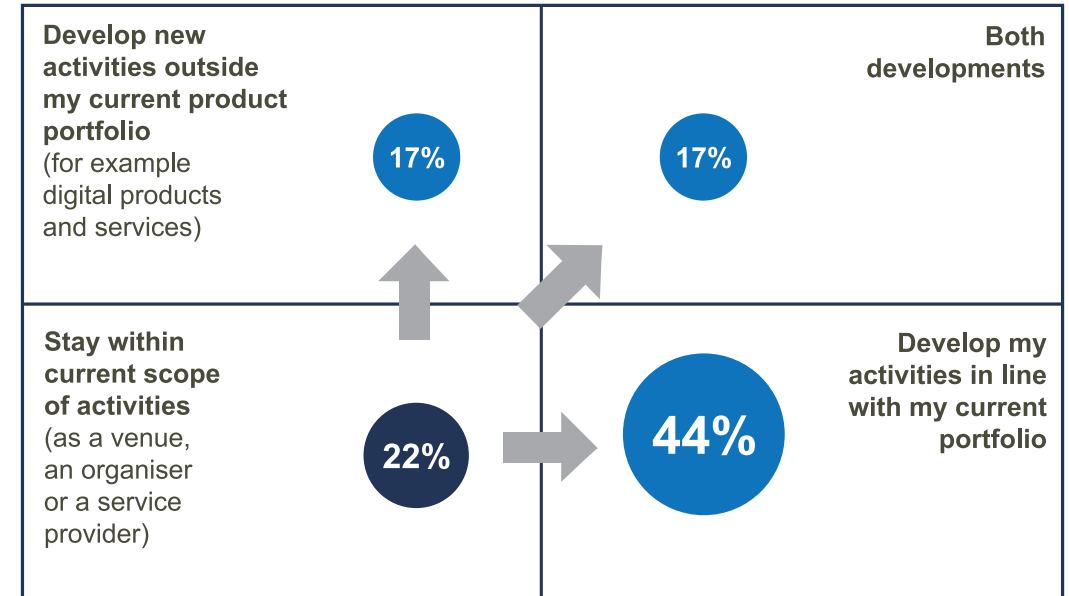




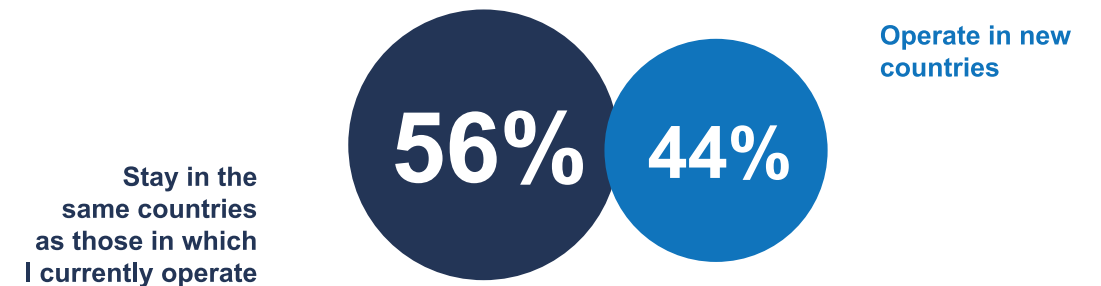
Financial expectations of Chinese exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

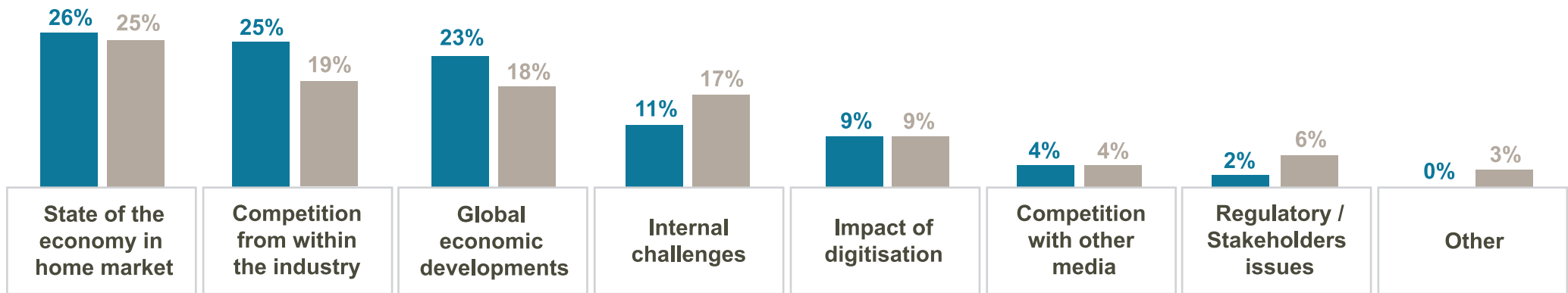


Detailed results for China



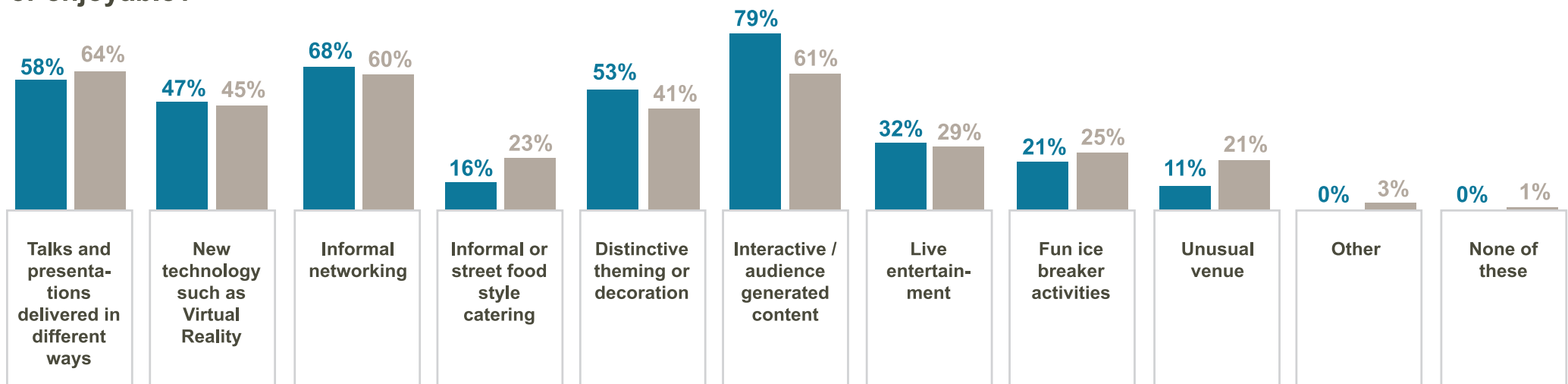
Most important business issues in the exhibition industry in China and globally

China Global



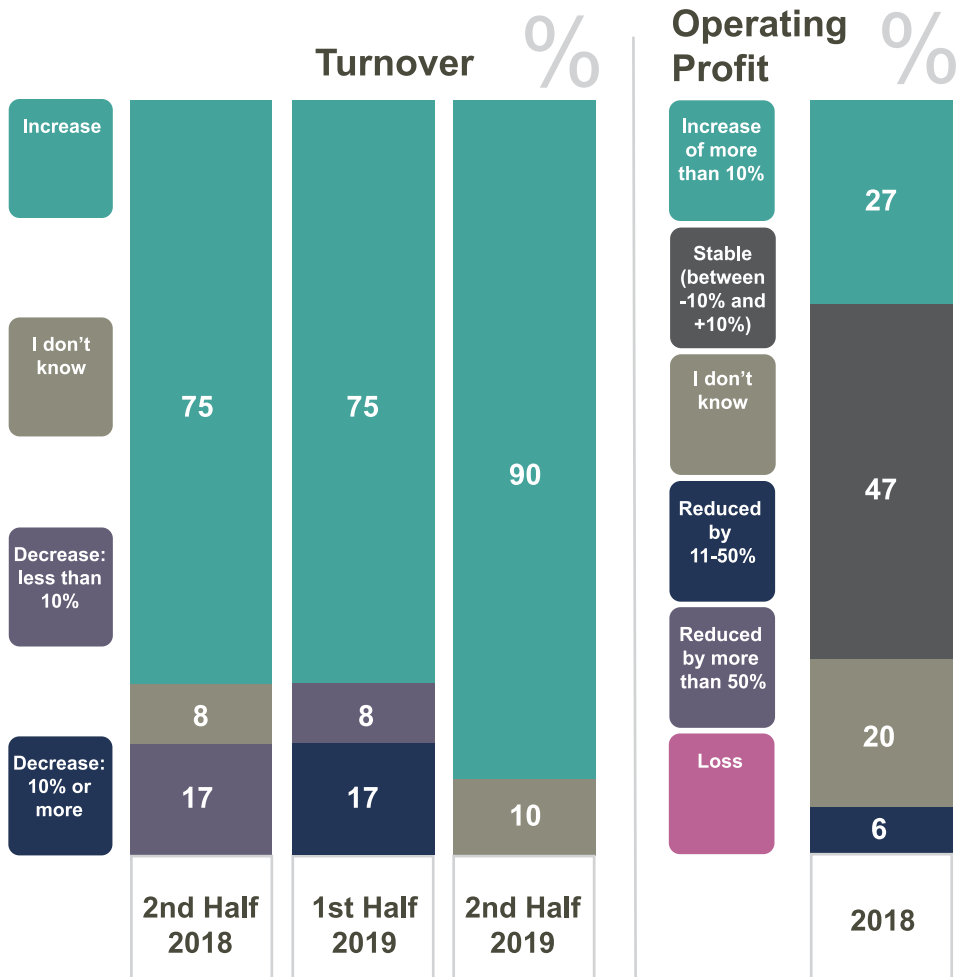
Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

China Global

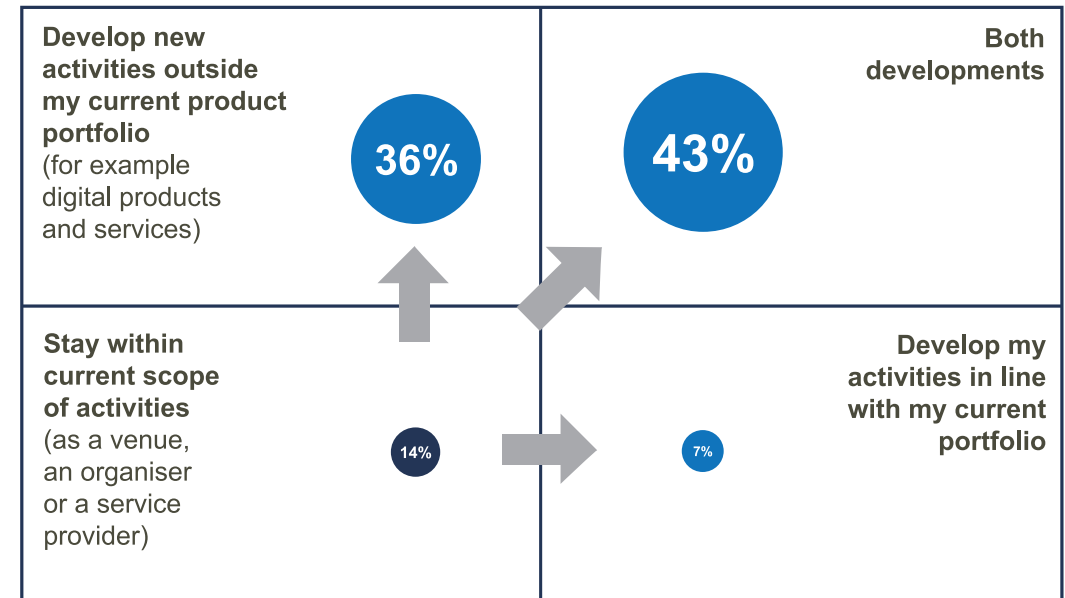




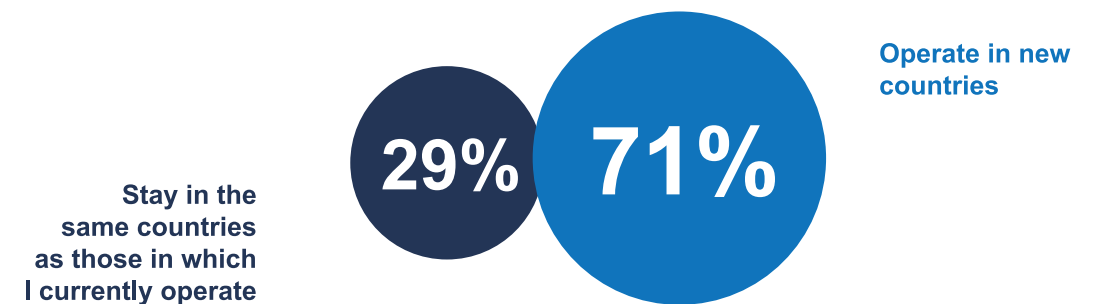
Financial expectations of Indian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



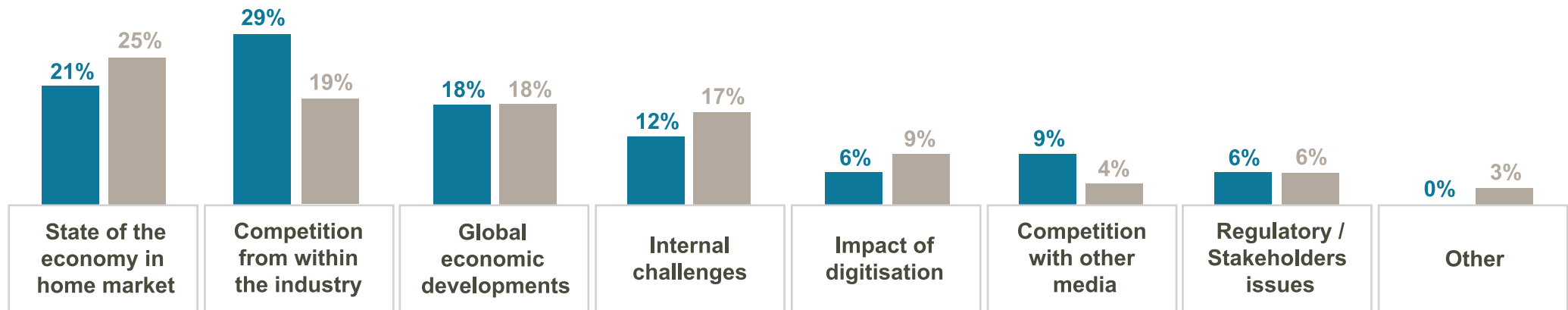
Detailed results for India



Most important business issues in the exhibition industry in India and globally

India

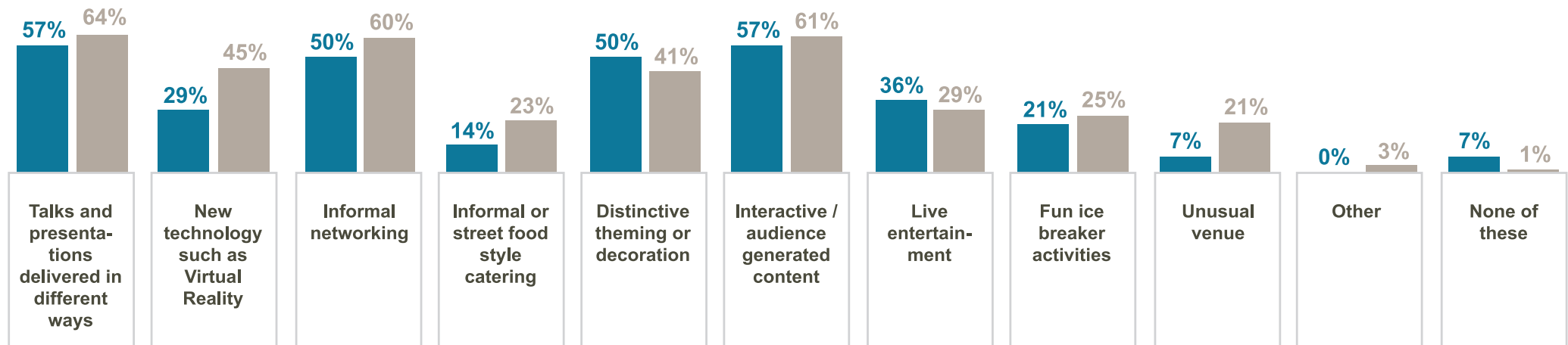
Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

India

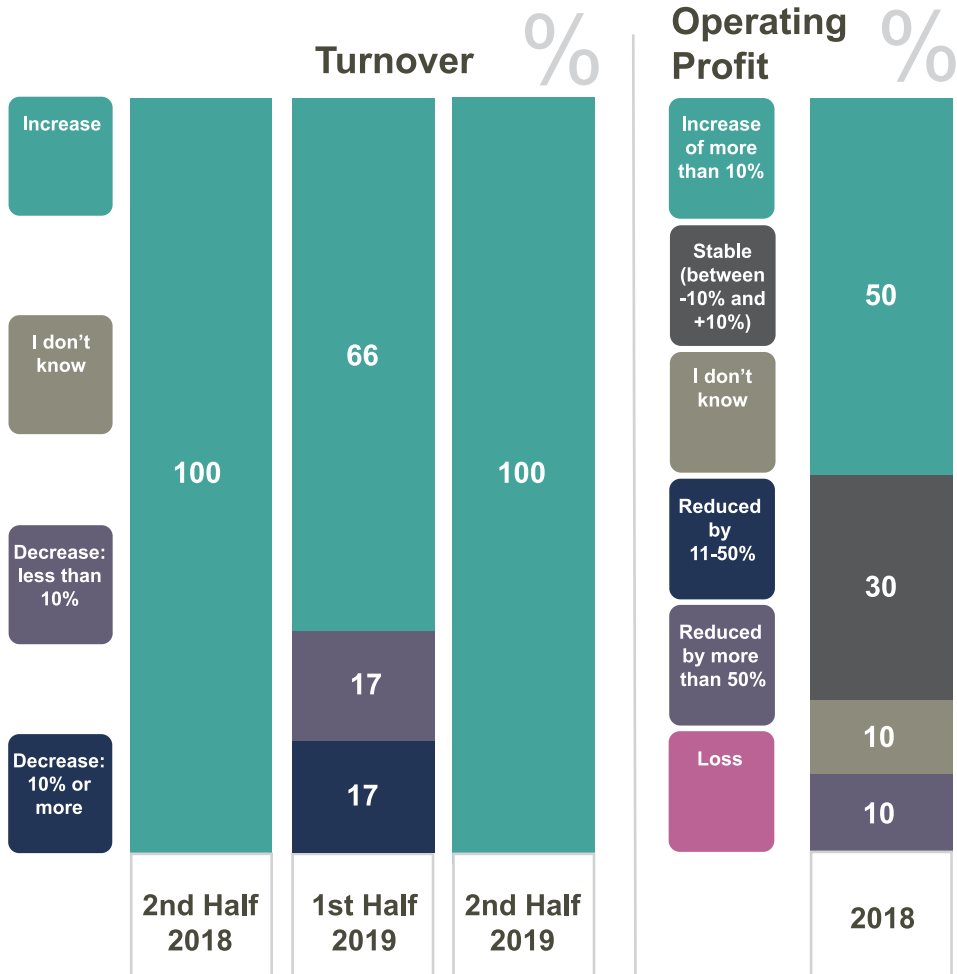
Global



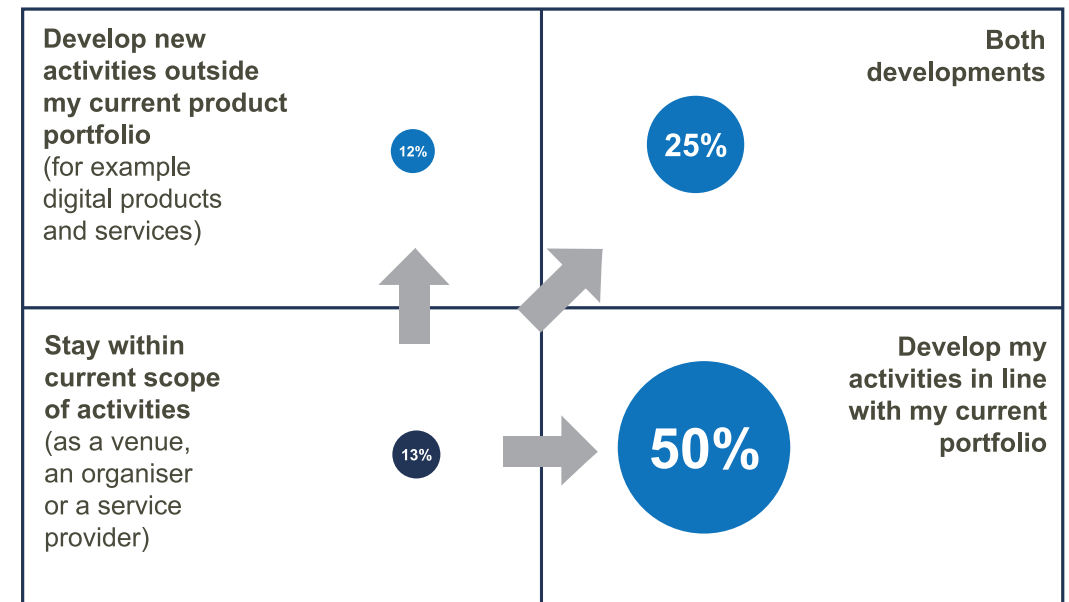
Detailed results for Indonesia



Financial expectations of Indonesian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

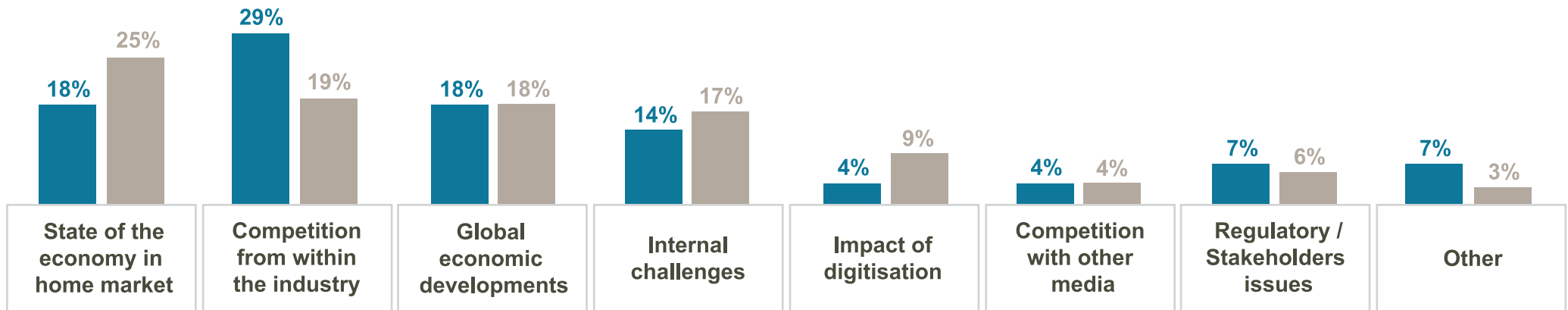


Detailed results for Indonesia



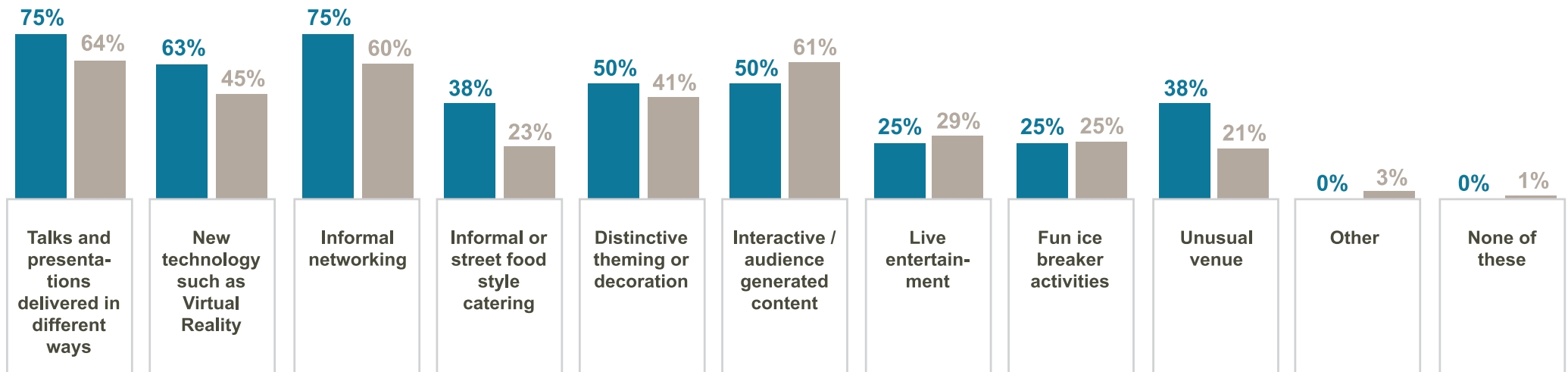
Most important business issues in the exhibition industry in Indonesia and globally

Indonesia Global

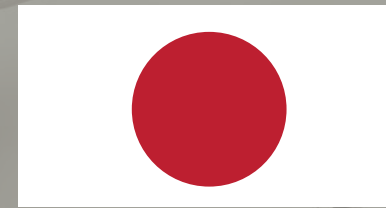


Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

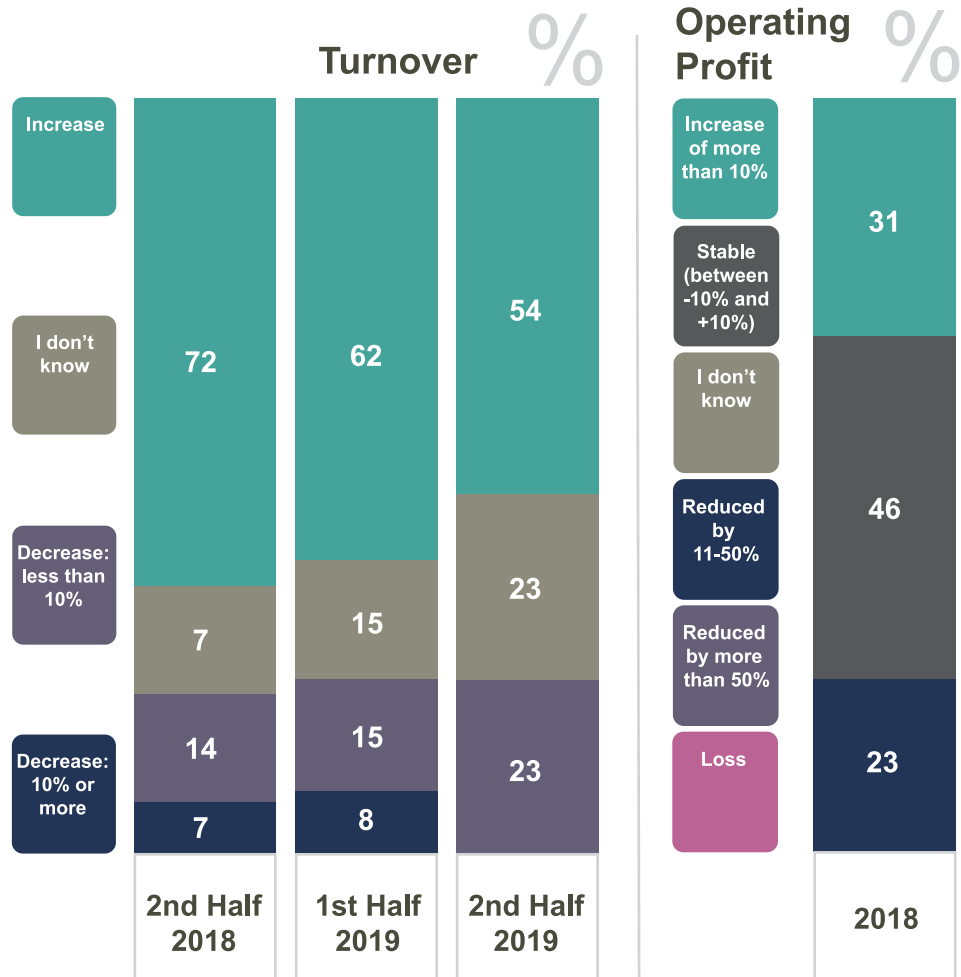
Indonesia Global



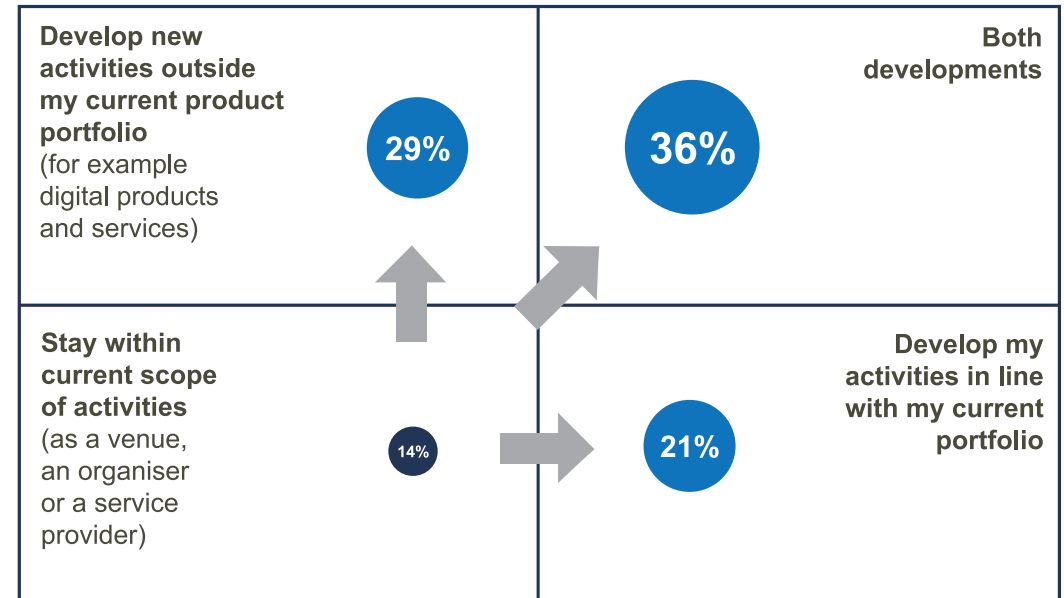
Detailed results for Japan



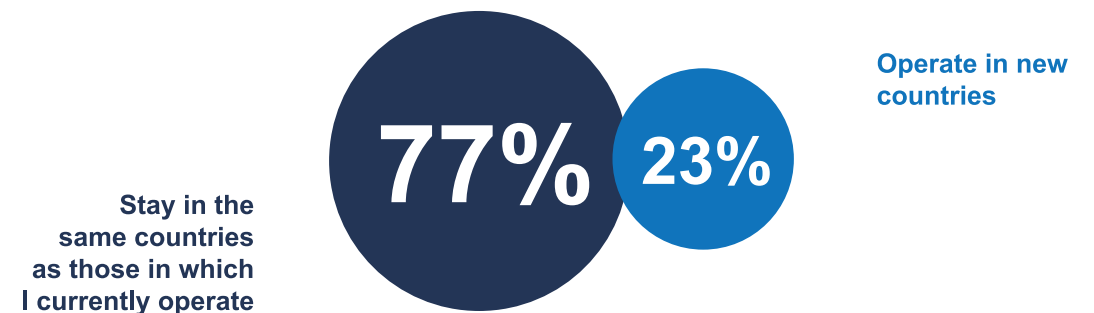
Financial expectations of Japanese exhibition companies compared to previous years



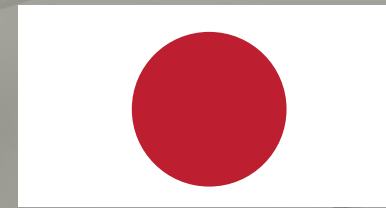
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

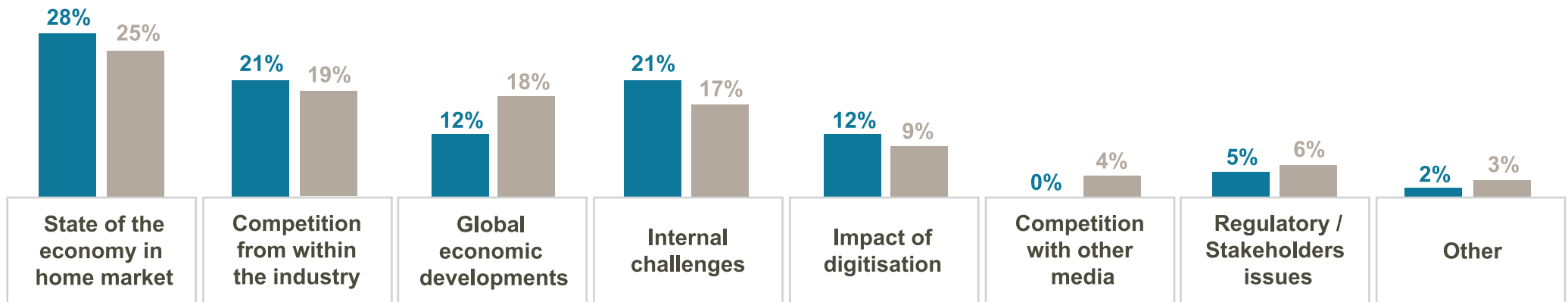


Detailed results for Japan



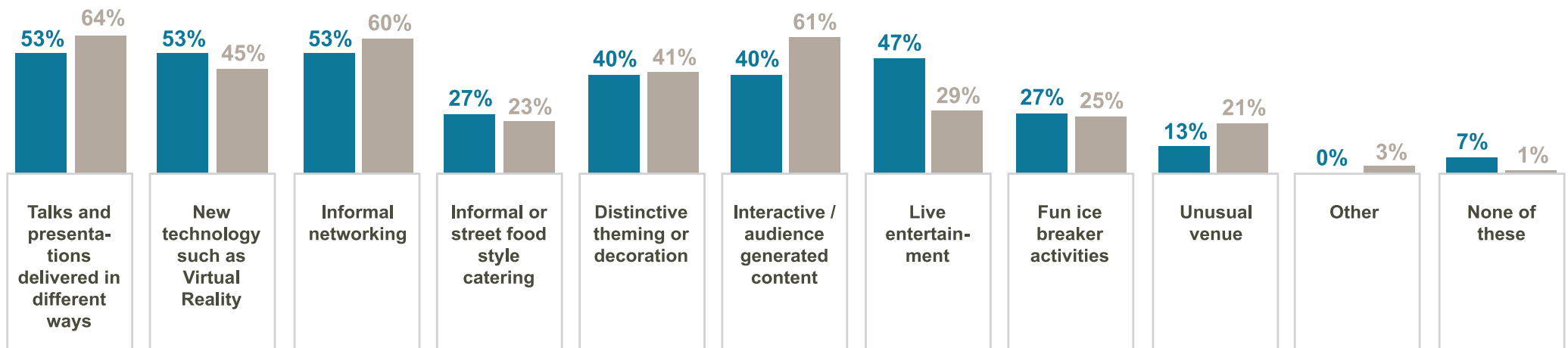
Most important business issues in the exhibition industry in Japan and globally

Japan Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

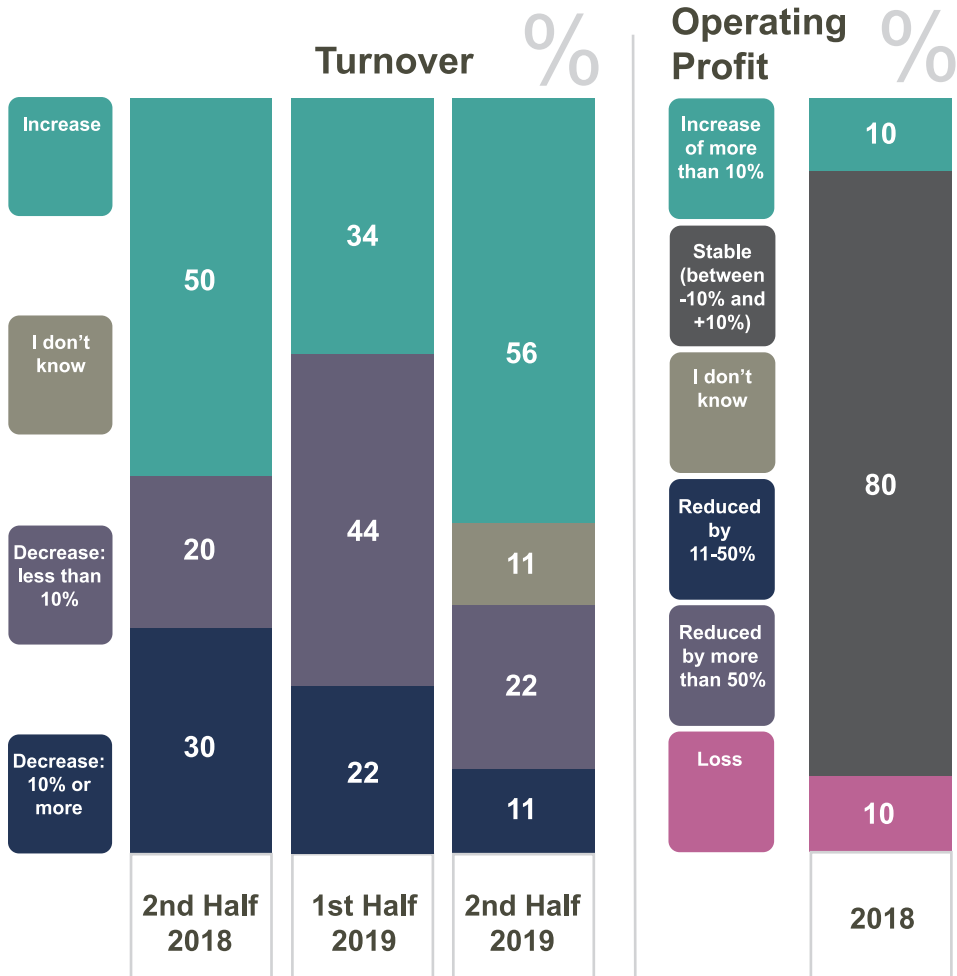
Japan Global



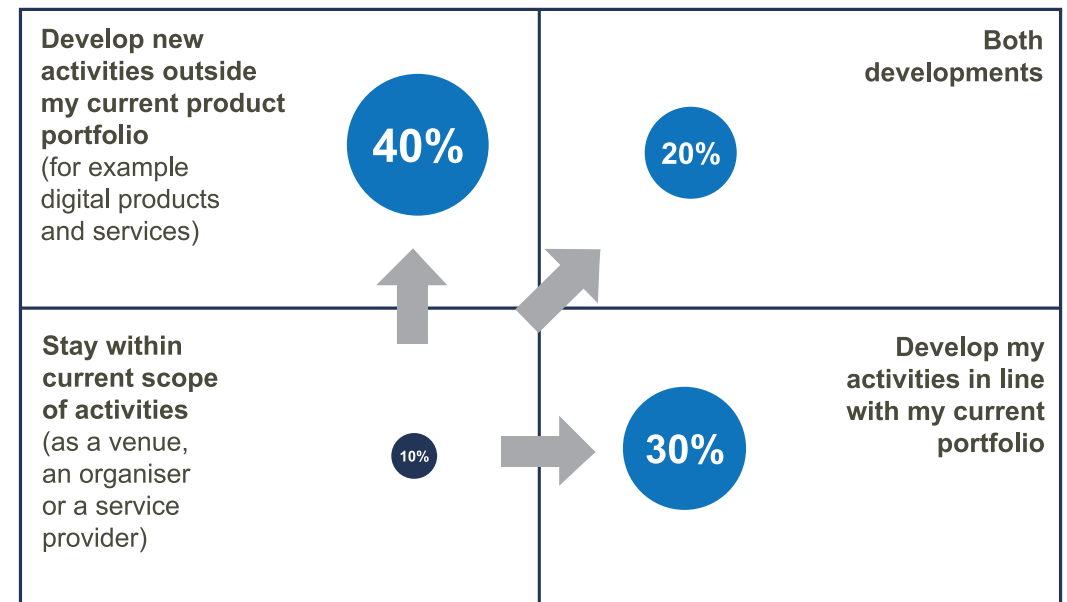
Detailed results for Macau



Financial expectations of Macau exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

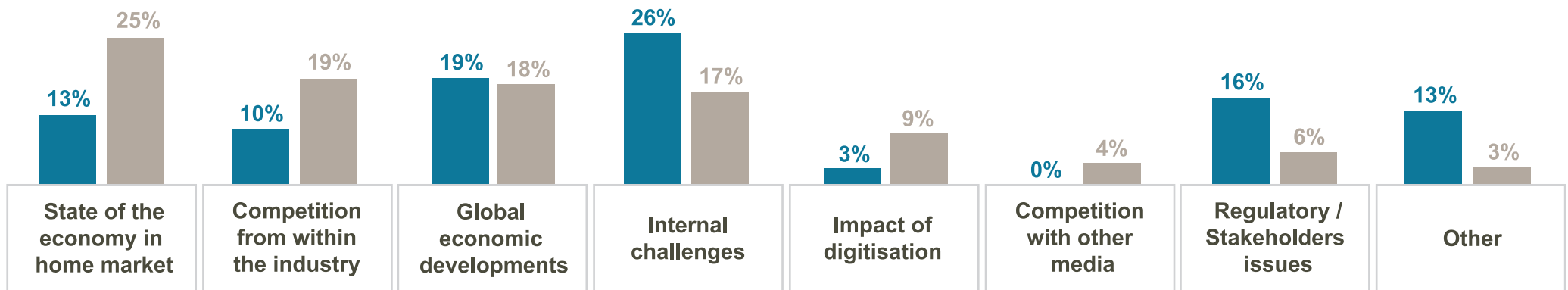


Detailed results for Macau



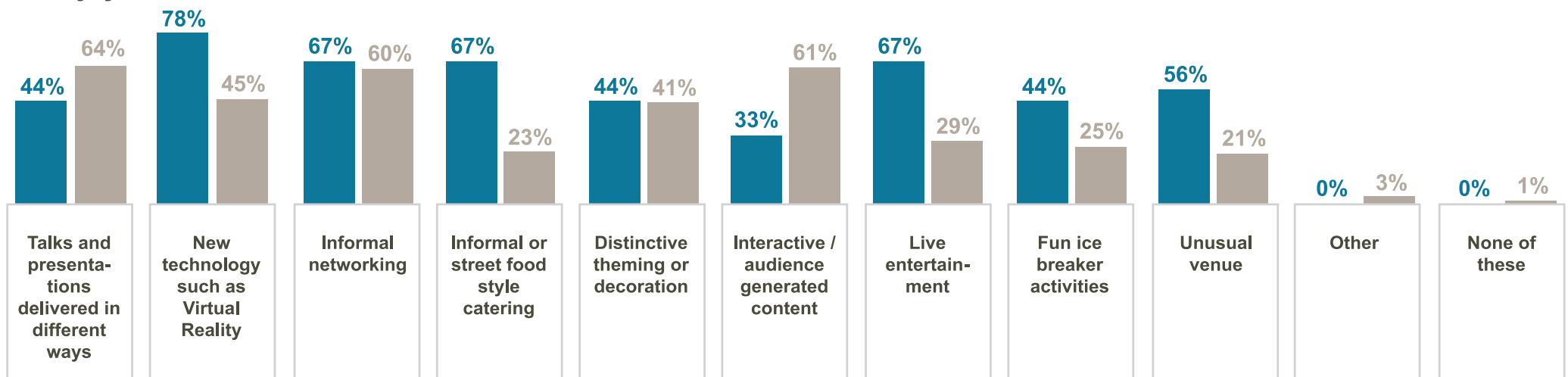
Most important business issues in the exhibition industry in Macau and globally

Macau Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

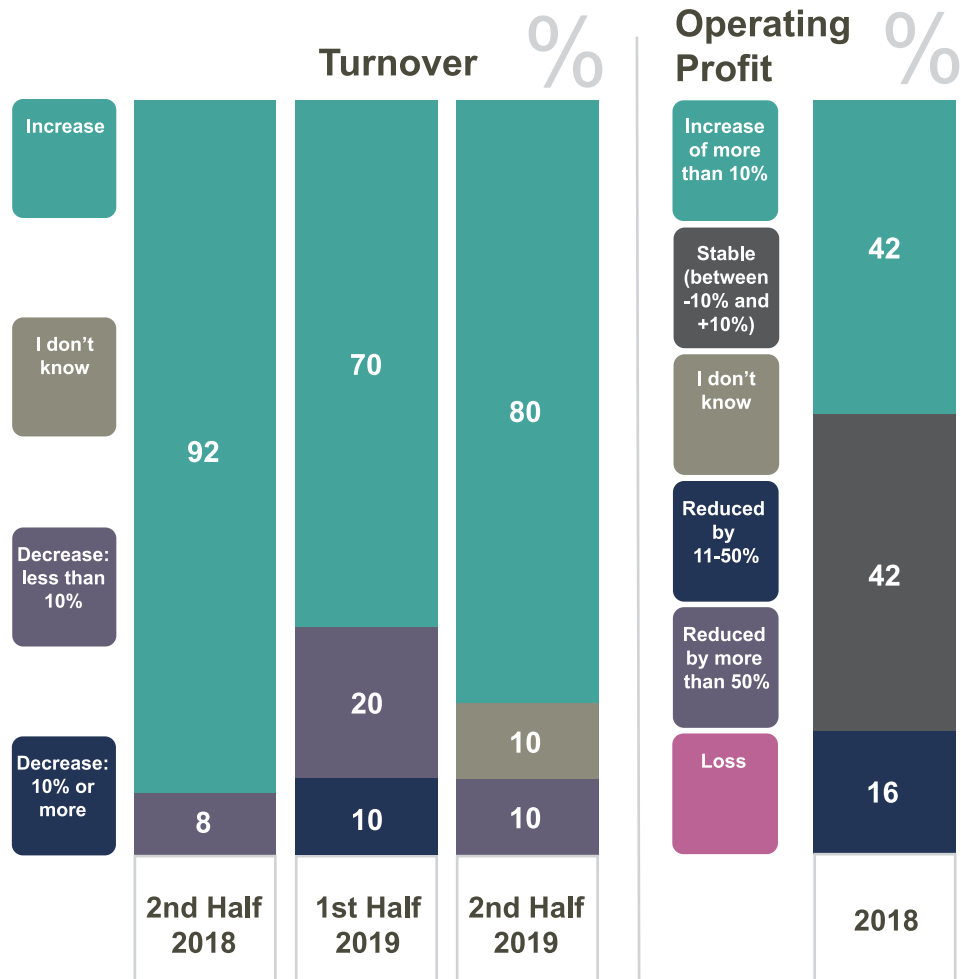
Macau Global



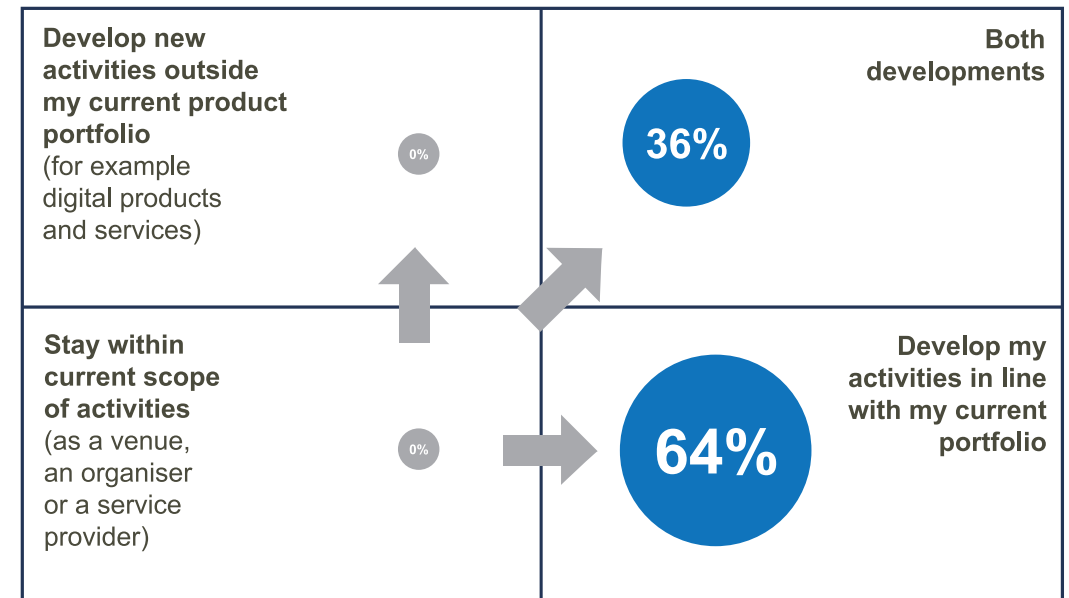
Detailed results for Thailand



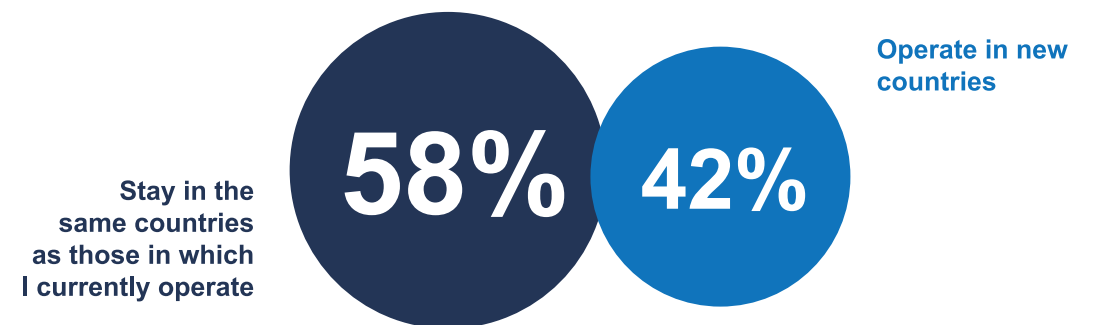
Financial expectations of Thailand exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

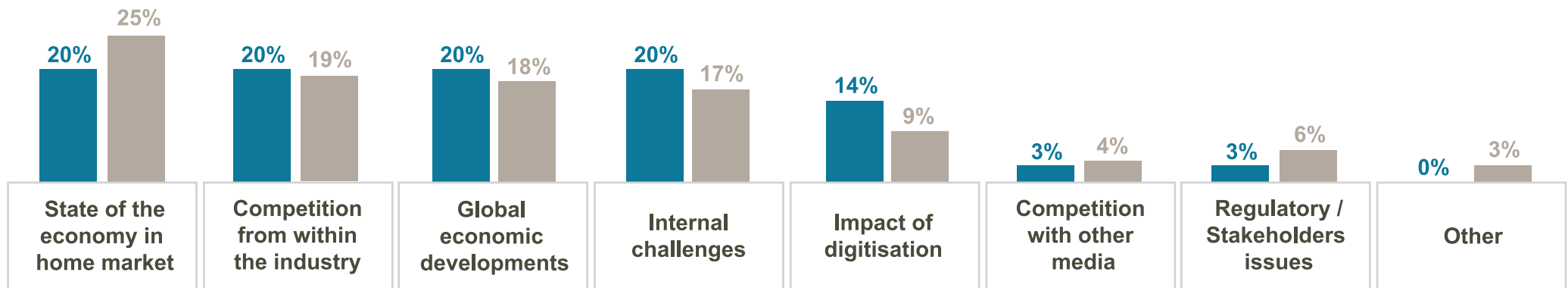


Detailed results for Thailand



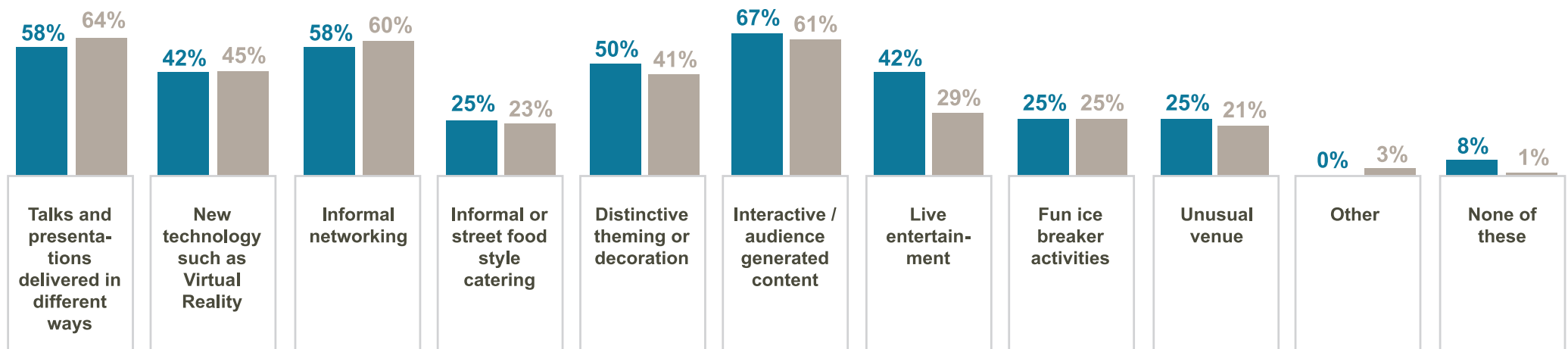
Most important business issues in the exhibition industry in Thailand and globally

Thailand Global



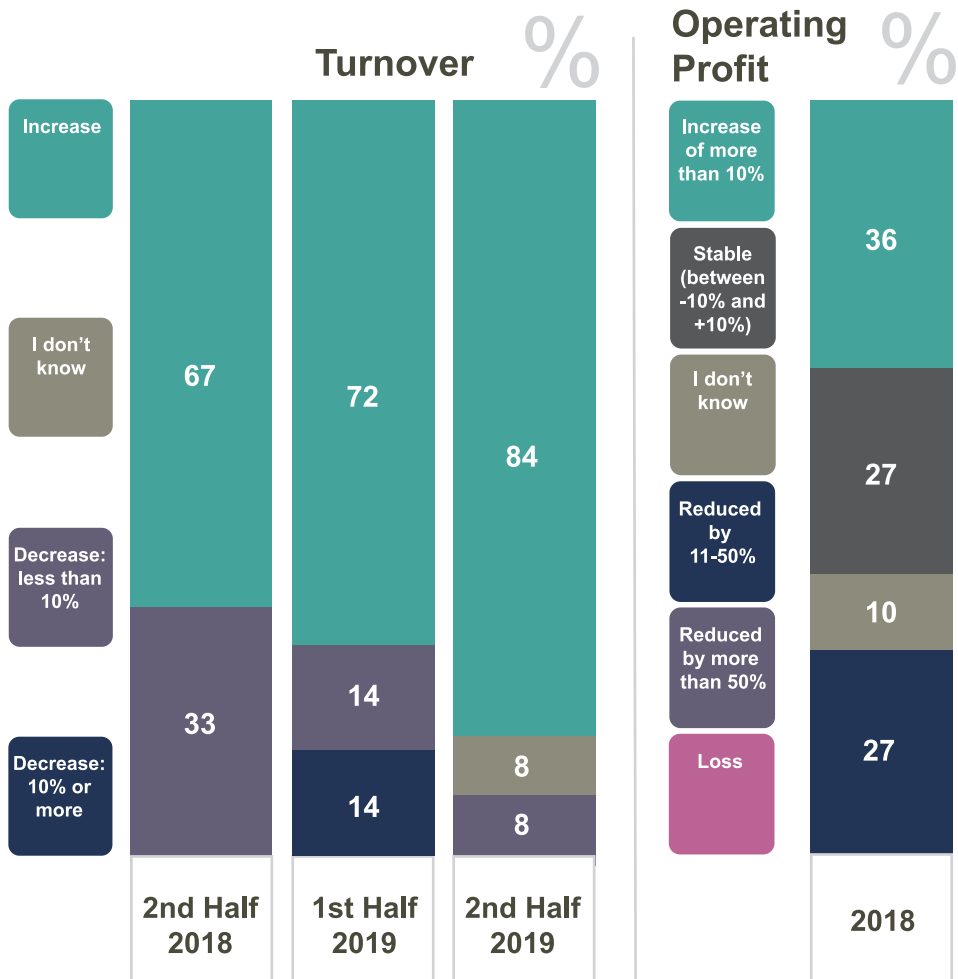
Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Thailand Global

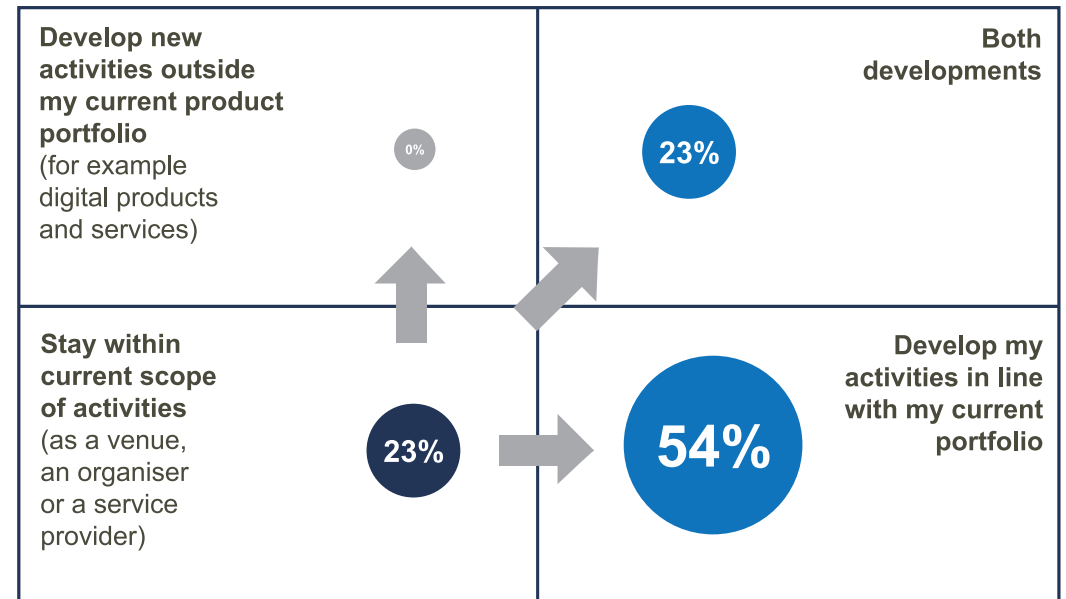


Detailed results for other countries in Asia - Pacific

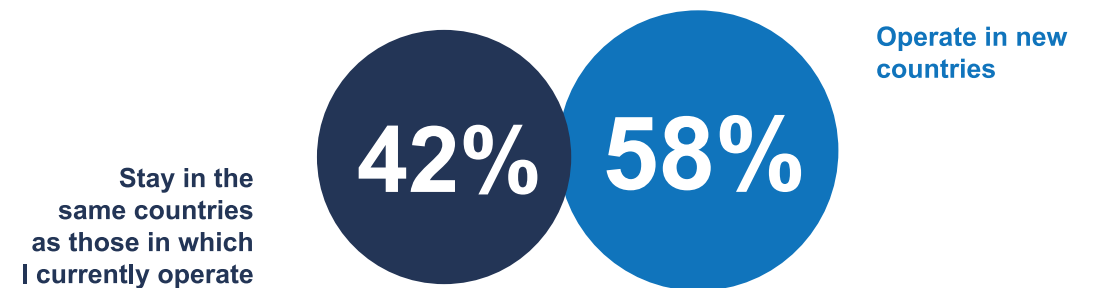
Financial expectations of other countries in Asia - Pacific exhibition companies compared to previous years



Current strategic priorities related to the range of activities



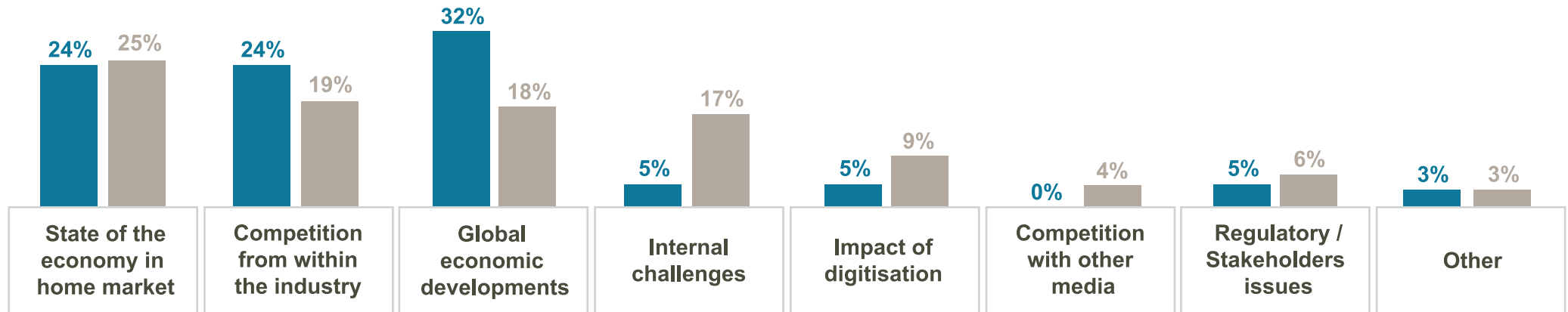
Current strategic priorities related to geographic exposure



Detailed results for other countries in Asia - Pacific

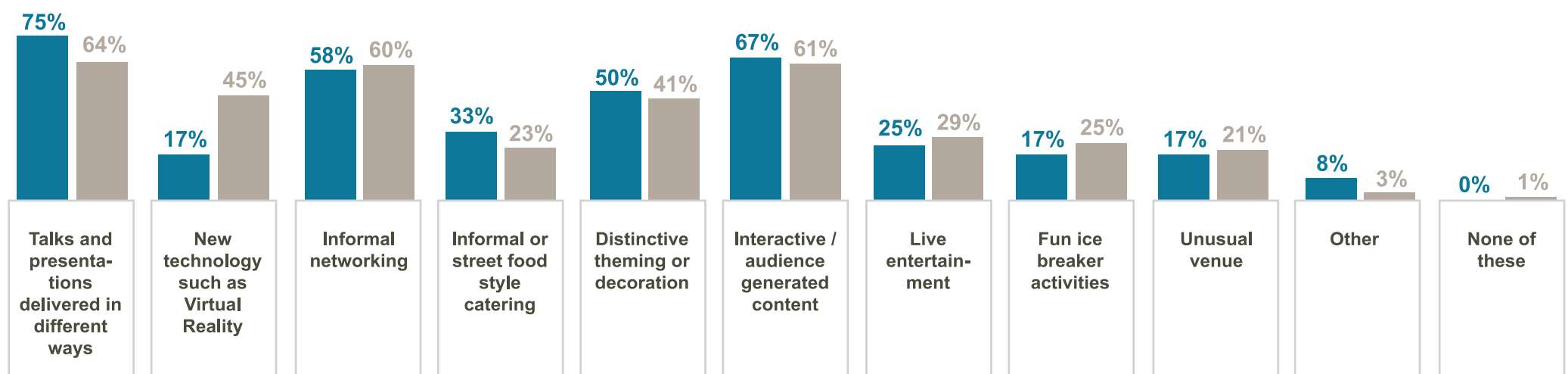
Most important business issues in the exhibition industry in other countries in Asia - Pacific and globally

Rest of AP Global



Which of the following do you think are most likely to make a trade show entertaining or enjoyable?

Rest of AP Global



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. This 22nd survey, concluded in January 2019, was answered by 302 companies from 53 countries. The results are detailed for 19 geographical zones, including 15 major markets. Survey results reveal a generally positive outlook in terms of financial expectations with, however, significant differences at market level:

- Regarding turnover year-on-year, 74% of companies around the world declared an increase in the 2nd half of 2018, 63% anticipate one for the first half of 2019 and 69% for the 2nd half of 2019. Several markets anticipate outperforming these scores for 2019: Brazil, China, Germany, India, Indonesia, Italy, Mexico, Thailand, the Middle East and the UK, whereas a significant level of uncertainty exists in South Africa, coupled with several expected decreases in Australia, Japan and Macau;
- In terms of operating profit, in each of the four regions, 80% of companies maintained a good level of performance in 2018 and around 30 to 40% of them declared an increase of more than 10% compared to 2017. The highest proportions of companies declaring such an increase are observed in Mexico (62%), Italy (56%), United Kingdom (55%) and Indonesia (50%).

When asked about the most important issues for their business in the coming year, companies remain concerned about the following 4 topics: “State of the economy in home market” (25% in the current survey, up 1% compared to 6 months ago), “Global economic developments” (20%, up 2%), “Competition from within the industry” (19%, up 1%) and “Internal challenges” (15%, down 2%).

The survey also tackled the “entertainment” component of exhibitions, highlighted in the recent “Global Visitor Insights” produced by UFI and EXPLORI as especially important for the younger attendees. Results

highlight a good matching between the views of companies from the exhibition industry with those from the visitors, with the most important items being selected in a similar way: “Talks and presentations delivered in different ways” (42% for visitors and 40% in this survey), “New technology such as Virtual Reality” (34% for visitors and 28% in this survey) or “Informal networking” (29% for visitors and 37% in this survey).

Finally, companies were asked about their current strategic priorities in two areas and the results indicate that:

- In terms of the range of activities, a large majority of companies intend to develop new activities, in either the classic range of exhibition industry activities (venue/organiser/services), other live events or virtual events, or in both: 72% in the Middle East & Africa, 78% in Asia/Pacific and 88% respectively in the Americas and Europe.
- In terms of geographical expansion, 4 companies out of 10 on average declare an intention to develop operations in new countries. At region level, Europe and Americas show the biggest increase for this development when compared to the situation a year ago: 51% of companies based in Europe plan to operate in at least one additional country (+12% since last year) and 41% of companies based in the Americas (+11% since last year).

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!

THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2019 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 302 (in 53 countries/regions)

North America	29	Europe	85	Middle East	15
Canada	2	Albania	2	Iran	3
Mexico	14	Austria	1	Iraq	1
USA	13	Belgium	3	Jordan	1
		Croatia	1	Kuwait	1
Central & South America	33	Czech Republic	1	Qatar	1
Argentina	6	France	2	Saudi Arabia	3
Bolivia	3	Georgia	1	UAE	5
Brazil	12	Germany	18		
Chile	2	Greece	2	Asia / Pacific	120
Colombia	5	Hungary	1	Australia	17
Costa Rica	1	Italy	10	China	23
Cuba	1	Netherlands	2	India	17
Ecuador	1	Portugal	1	Indonesia	10
El Salvador	1	Romania	1	Japan	15
Perú	1	Russian federation	12	Macau	11
		Slovenia	1	Malaysia	2
Africa	20	Spain	4	New Zealand	1
South Africa	19	Sweden	3	Singapore	6
Kenya	1	Turkey	7	South Korea	4
		Ukraine	1	Thailand	13
		United Kingdom	11	Vietnam	1

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