

## UFI Global Barometer reports overall dynamism for the year ahead

- Further turnover increases expected for 2019 in all four regions of the world, but significant geographical differences.
- Ever more companies look to take their business into new countries and regions, including a majority of European players.
- The exhibition industry appears aware of the need to develop the “entertainment” component of exhibitions for the younger attendees, with differing regional priorities.
- Japan included for the first time as the number of market profiles covered in the Barometer grows further to 19.

*Paris* – 5 February 2019: UFI, the Global Association for the Exhibition Industry, has released the latest edition of its flagship “Global Exhibition Industry Barometer research”, taking the pulse of the industry, and reporting global and regional trends as well as a total of 19 market profiles, including – for the first time - Japan.

The data indicates that, for each period between mid-2018 and the end of 2019, a majority of companies from all four global regions indicate Gross Turnover increases. This positive outlook is especially strong in both the Asia/Pacific and Middle East/Africa region respectively, where the highest levels in the last five years are recorded. In the Americas and Europe however, regions that recorded very high increases in the recent editions of the barometer, fewer companies now expect as strong growth as before.

Around the world, economic concerns, at national or global level, remain the top business issues for industry leaders, followed by competition from within the industry, internal challenges, and digitisation.

A large majority of companies are planning 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. Also, a growing number of companies are looking to expand into new geographical markets all around the world.

The report also points out a good matching between the view of the exhibition industry and that of show visitors – expressed in the recent “Global Visitor Insights” produced by UFI and EXPLORI – as to the need to develop the “entertainment” component of exhibitions. The most relevant actions are indeed selected in a similar way.

The 22nd edition of the barometer added one new partner to UFI's semi-annual industry research: JEXA (Japan Exhibition Association), and the research presents a global overview of industry data, broken down into company types and 19 separate market profiles. This edition's data is based on input from 302 participants from 53 countries and regions.

“The data shows that the exhibition industry is set to continue to grow globally as a whole, but foresees obstacles in various markets and regions. Ever more companies are focused on expanding their geographical footprint, to counter potential risks in the economic development in their respective home markets – most notably companies based in mature markets”, comments Kai Hattendorf, UFI Managing Director / CEO.

“Furthermore, there is no single formula on how to evolve exhibitions to respond to growing visitor demands of more entertainment or experience-driven events. The 19 detailed market profiles covered in this edition of the barometer show clearly differentiated approaches to this from around the world. These country and market profiles make the barometer so unique”, Hattendorf adds.

### Size & Scope

This latest edition of UFI's semi-annual industry survey was concluded in January 2019 and includes data from 302 companies in 53 countries.

The study delivers outlooks and analysis for fifteen major markets - including Japan for the first time: Australia, Brazil, China, Germany, India, Indonesia, Japan, Italy, Macau, Mexico, Russia, South Africa, Thailand, the UK and the US.

In addition, the research adds aggregated data for four regional zones, taking the number of countries and regions profiled in detail to a record of 19.

### Economic developments

Regarding turnover year-on-year, 74% of companies around the world declared an increase for the 2nd half of 2018. 63% anticipate an increase 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. At the same time, 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%), the United Kingdom (55%) and Indonesia (50%).

### Top Business Issues

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%).

"Global economic developments" appear as less of a concern in the Americas than in all other regions of the world, whereas "Competition from within the industry" appears as more of a concern in Asia-Pacific, compared to other regions.

### What Makes an Event More Enjoyable?

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 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 barometer also points out regional priorities concerning the preferred ways to add entertainment elements to exhibitions. 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.

### Strategic priorities

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 the 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).

## Background

The 22nd Global Barometer Survey, conducted in December 2018, provides insights given by 302 companies from 53 countries. It was conducted in collaboration with 13 UFI Associations Members: 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) for 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 Australia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, SISO (Society of Independent Show Organizers) in the USA, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

“In-depth research of this kind is the result of a trusted collaboration in the global UFI community”, says Christan Druart, UFI Research Manager. “This has allowed us to grow the number of market profiles even further. We welcome JEXA – The Japan Exhibition Association to the network participating in the Barometer.”

In line with UFI’s objective to provide vital data and best practices to the entire exhibition industry, the full results can be downloaded at [www.ufi.org/research](http://www.ufi.org/research).

The next UFI Global Barometer Survey will be conducted in June 2019.

Attachments: 1) Cover of the 22nd edition of the UFI Global Barometer report. 2) Top concerns of exhibition industry leaders globally. 3) Fast growing interest from the Americas and Europe in international expansion.

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*About UFI - The Global Association of the Exhibition Industry: UFI is the leading global association of the world’s tradeshow organisers and exhibition centre operators, as well as the major national and international exhibition associations, and selected partners of the exhibition industry. UFI’s main goal is to represent, promote and support the business interests of its members and the exhibition industry. UFI directly represents around 50,000 exhibition industry employees globally, and also works closely with its 60 national and regional association members. More than 780 member organisations in 86 countries around the world are presently signed up as members. Over 1,000 international trade fairs proudly bear the UFI approved label, a quality guarantee for visitors and exhibitors alike. UFI members continue to provide the international business community with a unique marketing media aimed at developing outstanding face-to-face business opportunities.*

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