

# UFI Global Exhibition Barometer

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

**23<sup>rd</sup> Edition**

Report based on the results of a survey concluded in July 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** ASSOCIATION OF FAIR AND TRADE SHOW ORGANISERS

Central & South America

 **AMPROFEC** ASSOCIATION OF MEXICAN PROMOTERS OF EXHIBITIONS AND CONFERENCES

Mexico

 **ASPERAPI** ASSOCIATION OF SPANISH PROMOTERS OF EXHIBITIONS AND TRADE SHOWS

Indonesia

 **EXHIBITION & EVENT ASSOCIATION OF AUSTRALASIA**

Australia

 **IEIA** Indian Exhibition Industry Association

India

 **Japan Exhibition Association**

Japan

 一般社団法人 日本展示会協会

Macau

 **Associação de Comércio e Exposições de Macau**

Russia

 **RUSSIAN UNION OF EXHIBITIONS AND FAIRS**

US

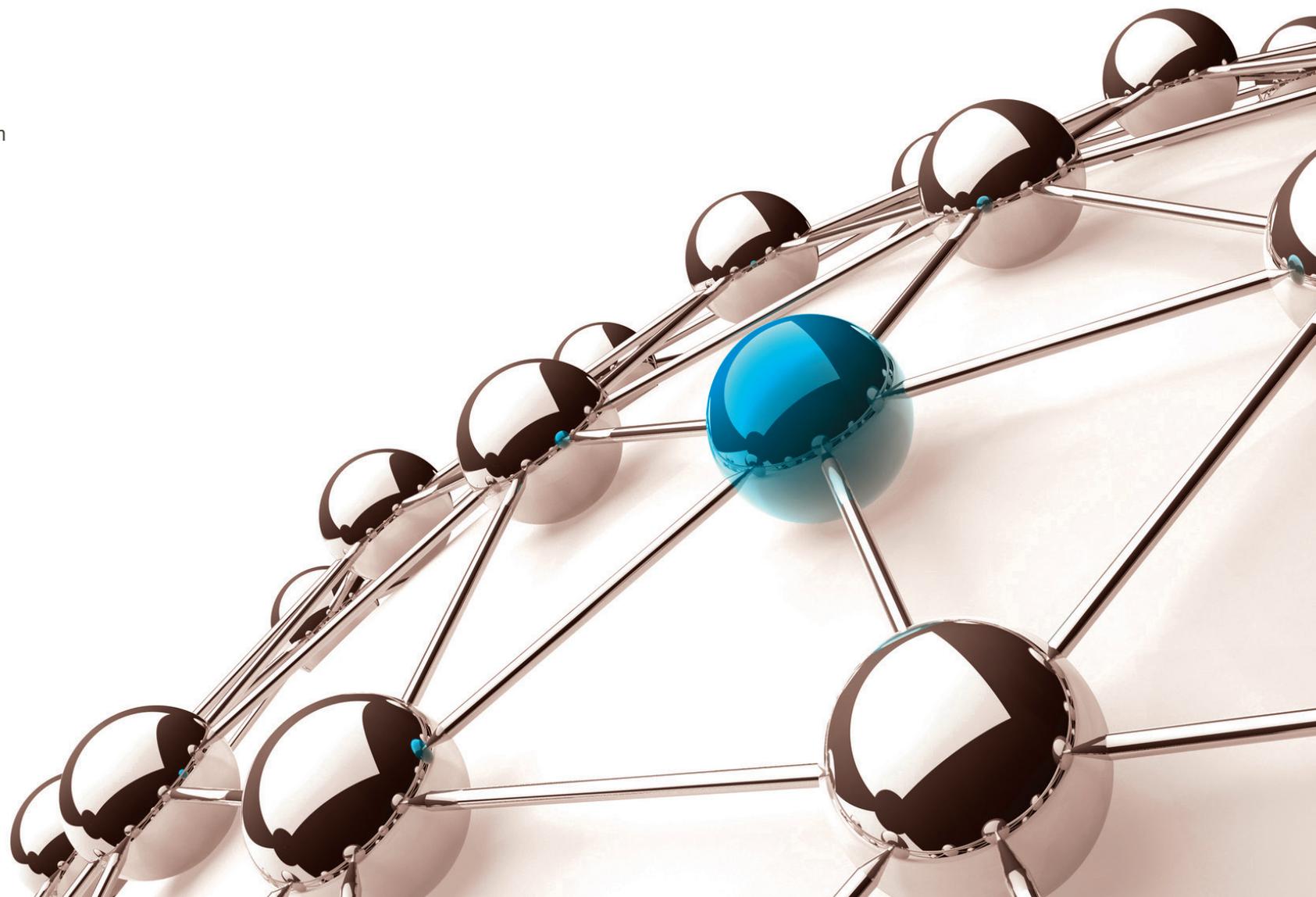
 **SISO** SOCIETY OF INDEPENDENT SHOW ORGANISERS

Thailand

 **TEA** THAI EXHIBITION ASSOCIATION

Brazil

 **UBRAFE** União Brasileira dos Promotores de Feiras



## Global Reports



Analysing the global exhibition industry with global comparisons.

**Global Barometer** – Bi-annual report on industry developments.

**World Map of Venues** – Report on trends in venue space and project developments globally.

**Economic Impact Study** – Report on the value of exhibitions globally and regionally.

## Regional Reports



Regular market overviews on UFI's chapter regions.

**Euro Fair Statistics** – Annual list of certified data for Europe by country.

**The Trade Fair Industry in Asia** – Annual analysis of market developments for Asia/Pacific by country.

**The Exhibition Industry in MEA** – Overview of the exhibition market in the MEA region.

## Topical Reports



Focused reports on challenges and developments within the exhibition industry.

**Global Visitor Insights & Global Exhibitor Insights** – Data driven research reports on visitor feedback and exhibitor expectations.

**Best Practices Compendiums** – Case studies of successful industry developments.

**Global Digitisation Index** – An overview tracking digitisation developments within the industry.

## UFI Research Patron: **F R E E M A N**<sup>®</sup>

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UFI Research is available at  
[www.ufi.org/research](http://www.ufi.org/research)

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Welcome to the 23<sup>rd</sup> edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, concluded in July 2019. It represents up-to-date information on the development and outlook of the global exhibition industry as well as on 20 specific countries and zones.

UFI began assessing the impact of the 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 RUEF (Russian Union of Exhibitions and Fairs), who joined as from this latest survey, these associations 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, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, SISO (Society of Independent Show Organizers) for the UK, 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 (322 from 57 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 20 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](mailto:chris@ufi.org).

This research is available online at [www.ufi.org/research](http://www.ufi.org/research).

The 23<sup>rd</sup> Barometer surveyed the evolution of participants' gross turnover expectations for the two halves of 2019 and the first half of 2020 and 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.

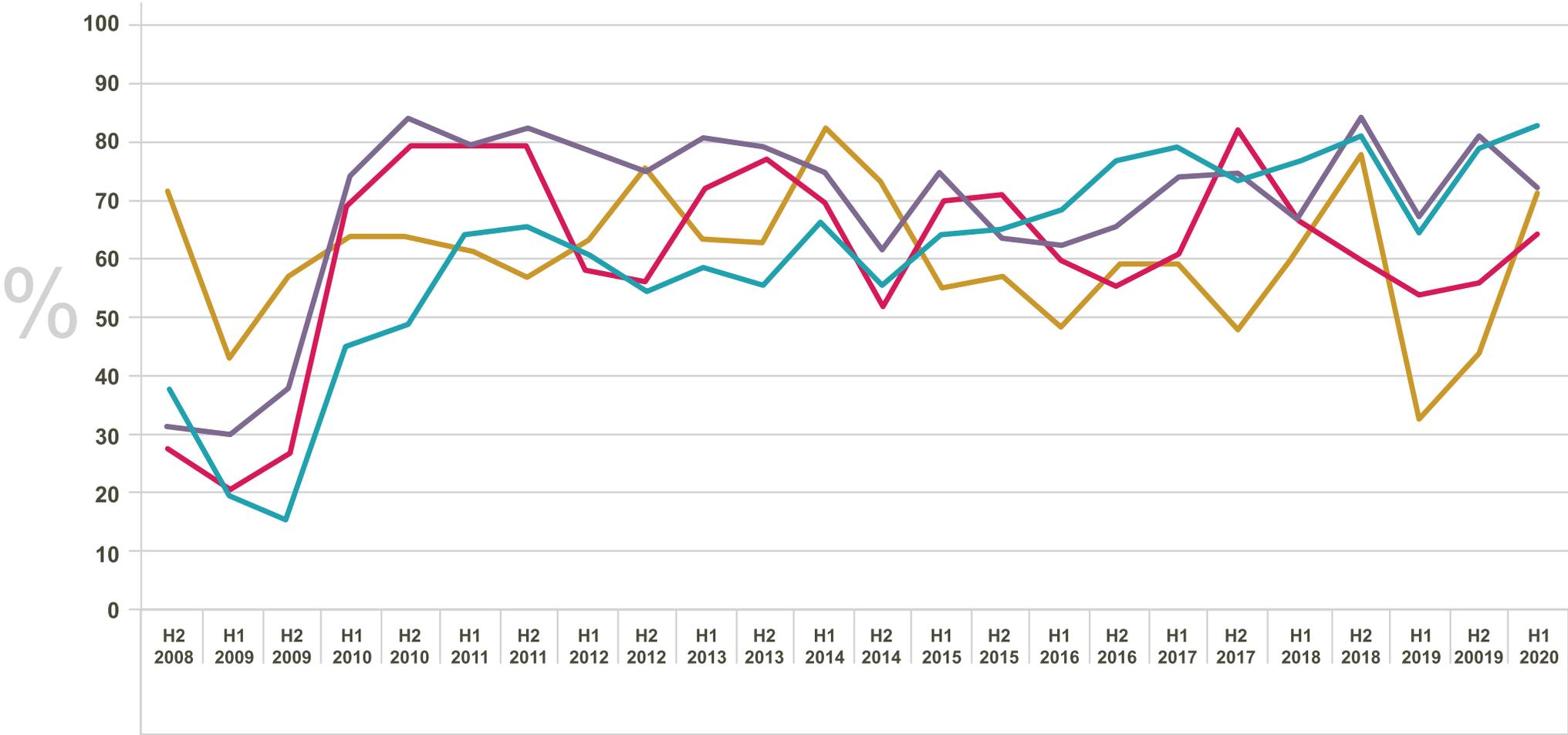
**While a majority of companies in all regions – except Middle East / Africa - expect Gross Turnover increases for the two halves of 2019 and the first half of 2020, the first half of 2019 appears to be weaker compared with recent years. Having said that, current forecasts for the second half of 2019 and the first half of 2020 show a return to robust levels.**

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. As such, they provide better insights into the different situations:

- **Eight of the surveyed countries and regions have, for all three periods surveyed, a majority of companies declaring turnover increases: Australia, Brazil, Italy, Japan, South Africa, Thailand, UK and USA.**
- **For the second half of 2019 and the first half of 2020, this situation also applies to Germany, India, Indonesia, Macau and Russia.**
- **In Argentina, China, the Middle East and Mexico, a significant proportion of companies report a slowdown in their turnover.**

% 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 23<sup>rd</sup> Global Barometer survey questioned the evolution of operating profits for 2018 and 2019 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 40 to 50% of them declared an increase of more than 10% compared to 2017.**

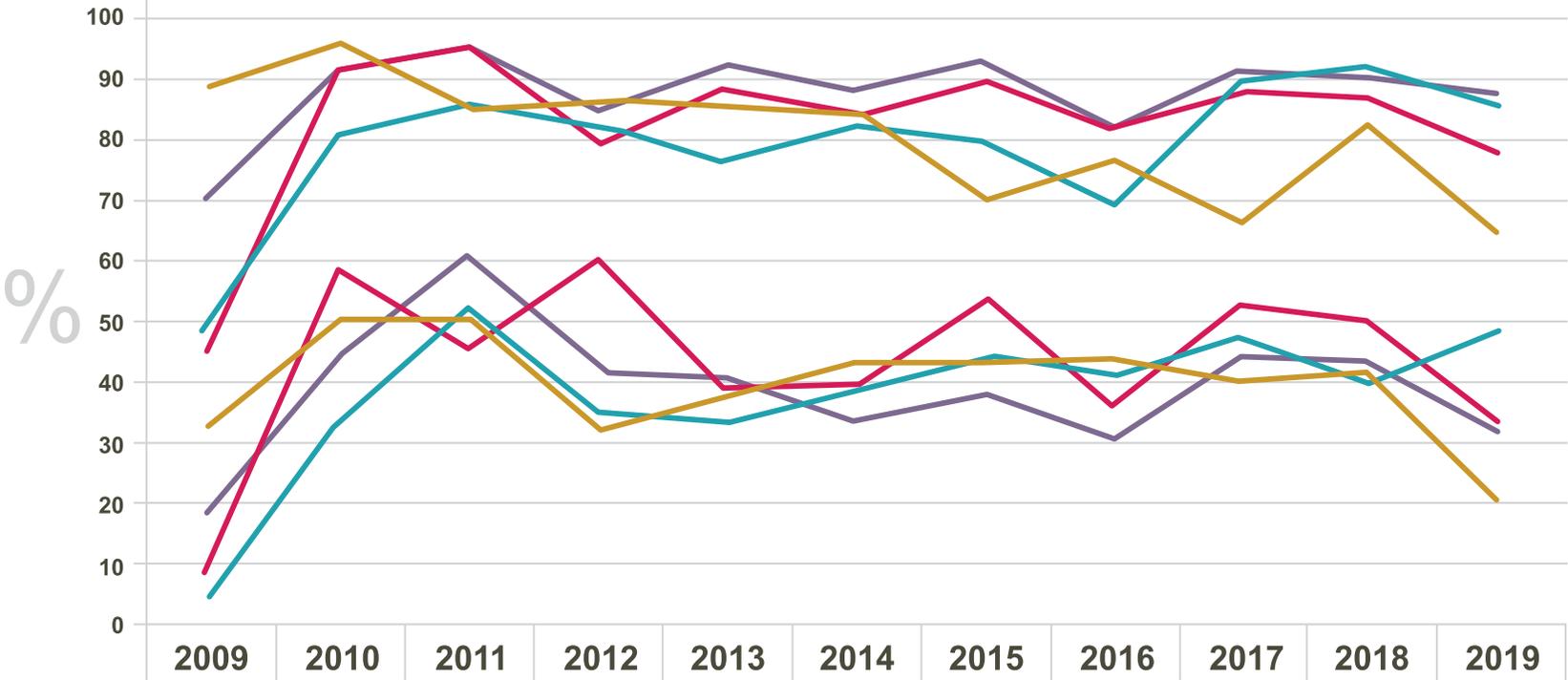
**The highest proportions of companies declaring such an increase in 2018 are observed in the UK (71%), Mexico (64%), Germany (62%), the USA (60%), Brazil and Italy (50%). On the opposite side, the lowest proportions are in Japan (27%), Russia (18%) and Macau (13%).**

- **For 2019, only Europe has, on average, an even higher proportion of companies expecting an increase of more than 10% of their operating profit. In all other regions, the share of companies projecting this decreases from 2018 to 2019.**

**The highest proportions of companies declaring such an increase in 2019 are observed in Russia (71%), UK (55%), India (53%) and the USA (45%). On the opposite side, the lowest proportions are in Thailand (20%), Argentina (14%) and the Middle East (9%).**

# Operating Profits compared to the previous year

Americas Europe Middle East - Africa Asia - Pacific



**% of companies declaring:**  
 - stable profits (between -10% and +10%)  
 - or increases of more than 10%

**% of companies declaring:**  
 - profit increases of more than 10%

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” (24% in the current survey, down 1% compared to 6 months ago);**
- **“Competition from within the industry” (19% in the current survey, same as 6 months ago);**
- **“Global economic developments” (19% in the current survey, down 1% compared to 6 months ago);**
- **“Internal challenges” (16% in the current survey, up 1% 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.**

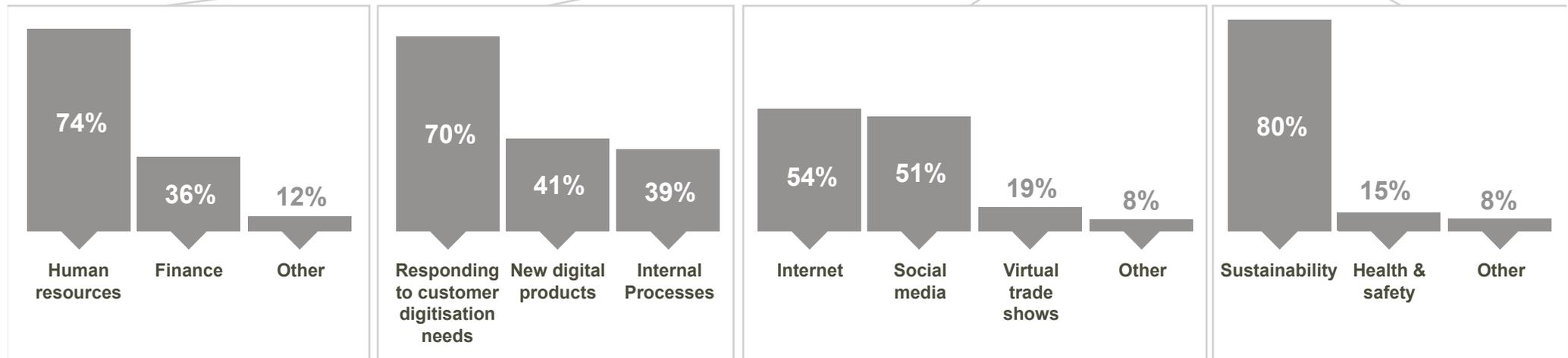
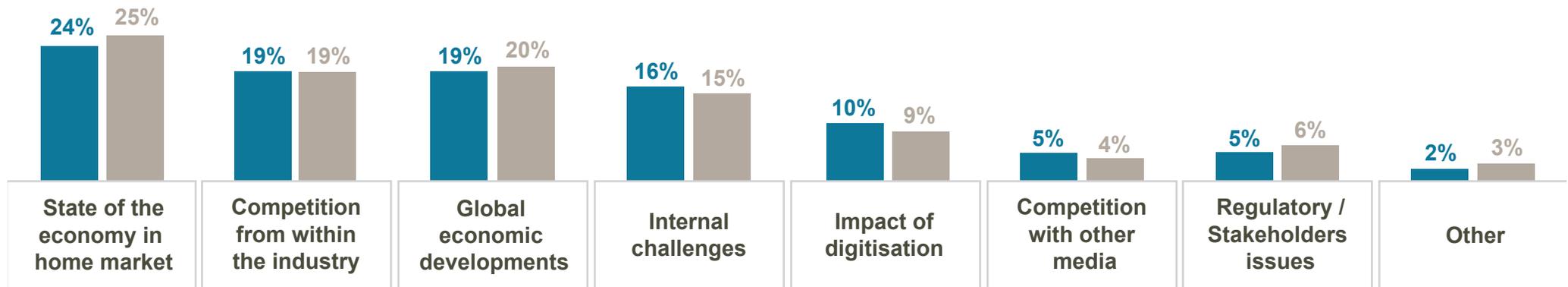
The following pages show the consolidated global results, including further insights. They also detail those results by region and by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”). The results show some differences:

- **“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” is less important for venues than for organisers and service providers.**

# Top Issues: Global Results

Results from current survey – June 2019

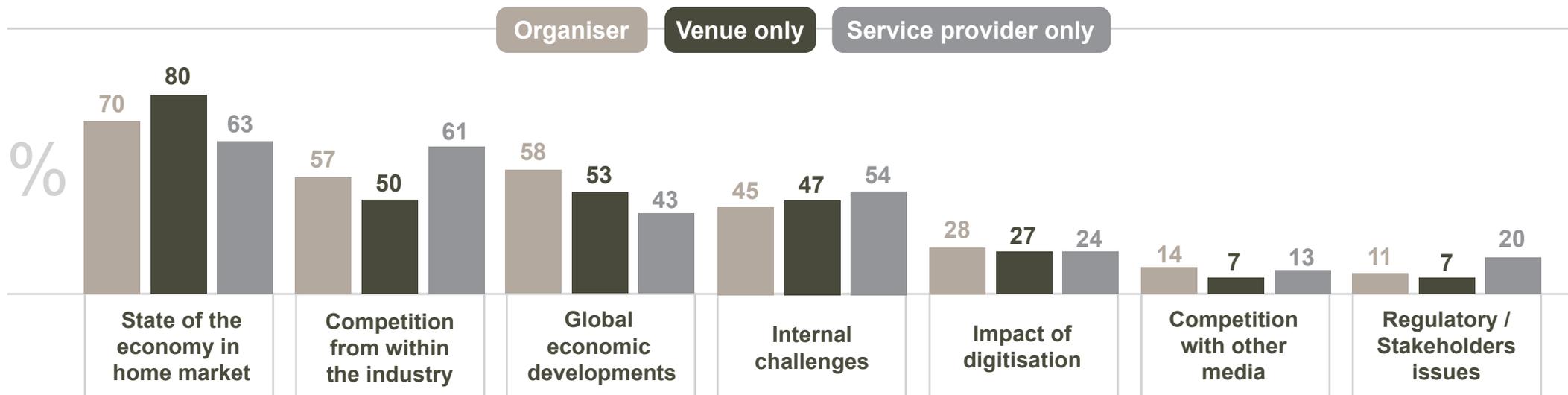
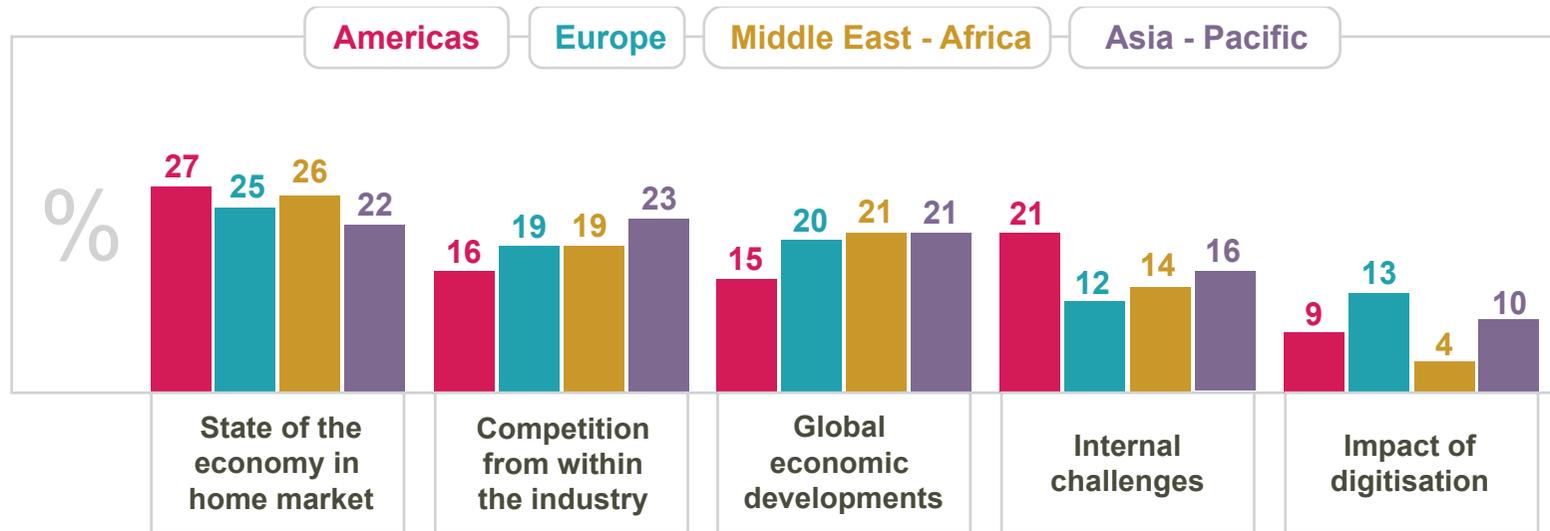
Results from last survey - December 2018



(multiple answers possible)

# Most important issues: detail by region and type of activity

## for the five top issues identified globally



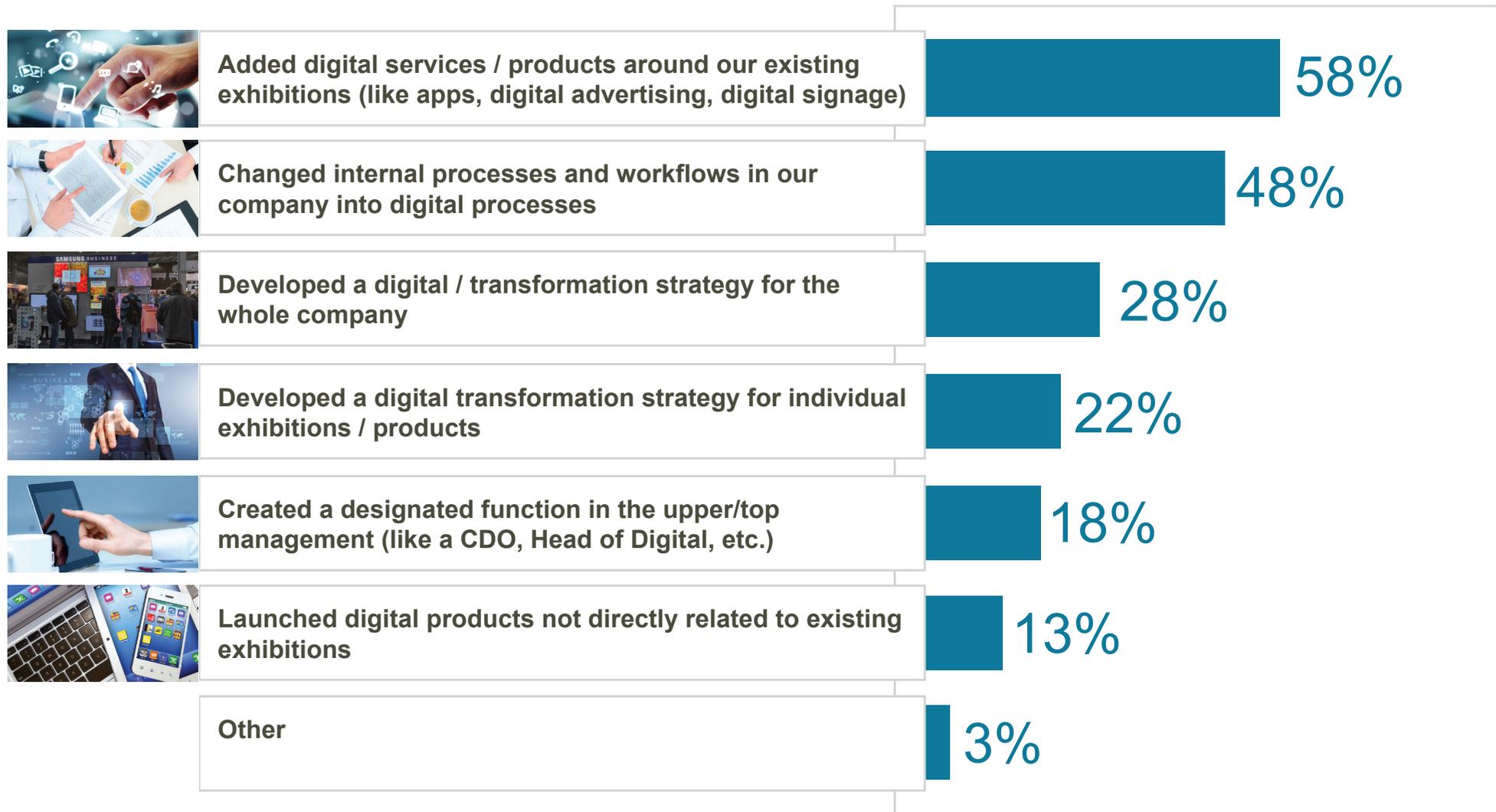
With digitisation accelerating in businesses around the world, the Global Barometer developed to also focus on the state of digital activity in the exhibition industry. The results show that the majority of companies have responded to the accelerating process of digitisation in the exhibition industry. However, progress is limited.

The “digitisation Implementation Index” towards a “full digitisation” is 27 globally. China, Germany, India, Indonesia, Italy, Mexico, the UK and USA are identified as the exhibition markets who are currently most advanced in the digital transformation process.

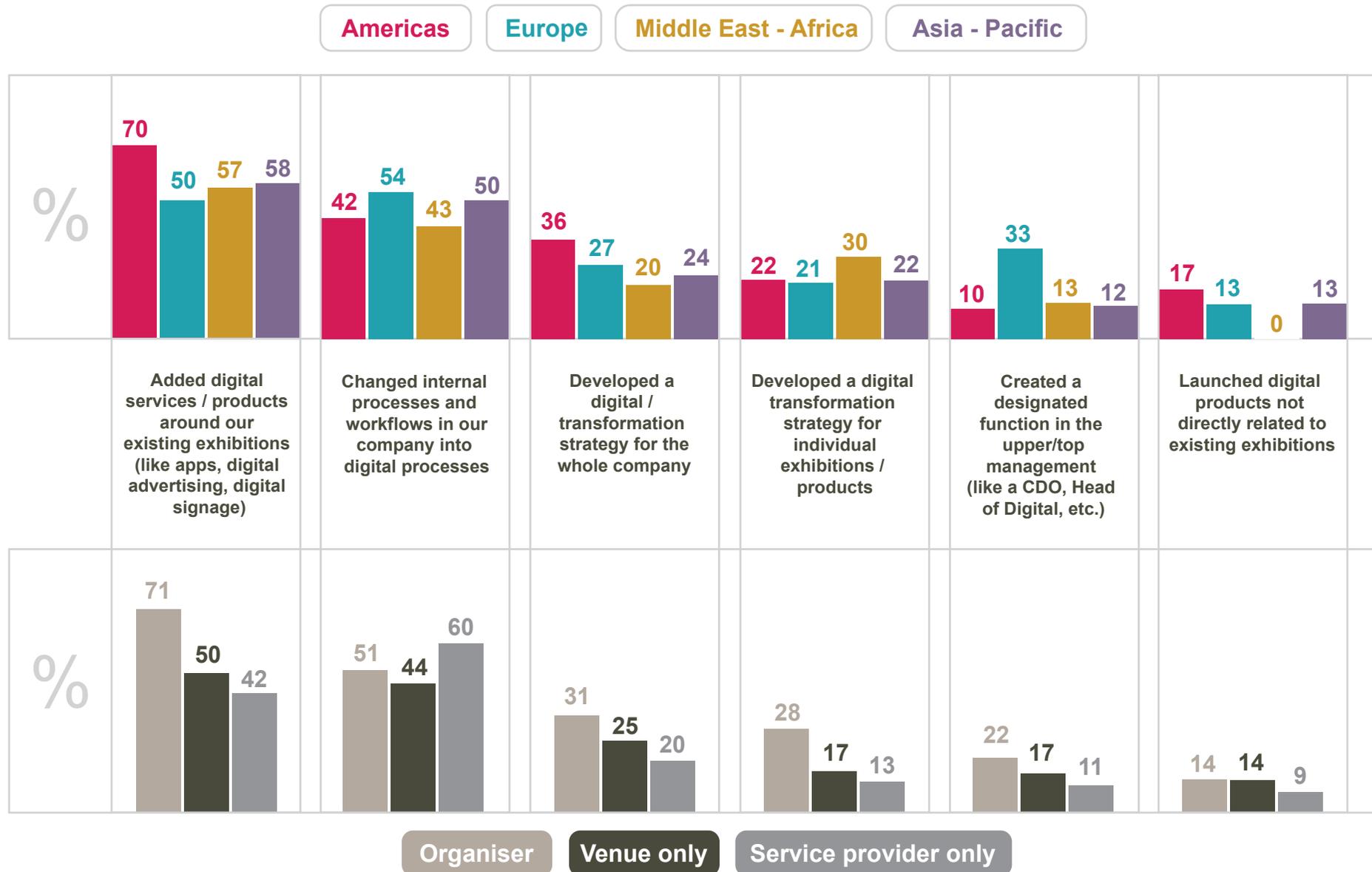
- **58% of survey participants reported that they have added digital services/products (like apps, digital advertising, digital signage) around existing exhibitions. This is already widely established in Brazil (71%), China (72%), Italy (64%), Mexico (75%), UK (73%) and USA (62%)**
- **The companies in the exhibition industry are digitising themselves as well: globally, 48% stated that they have changed internal processes and workflows to be more digital. The most advanced exhibition markets here are Australia (55%), China (56%), India (55%), South Africa (53%) and the UK (91%)**
- **28% of companies participating in the survey reported that they have developed a digital transformation strategy for the whole company, with Italy (55%), Mexico (50%), the UK (45%) and USA (46%) leading**

- **18% have created a designated function (like a Chief Digital Officer) in the upper/top management – led here by Germany (50%), Indonesia (30%), Mexico (33%), and Russia (54%)**
- **Finally, 13% of survey participants stated that they have launched digital products not directly related to existing exhibitions – a development especially visible in India (30%), Indonesia (30%), the UK (36%) and the USA (31%).**

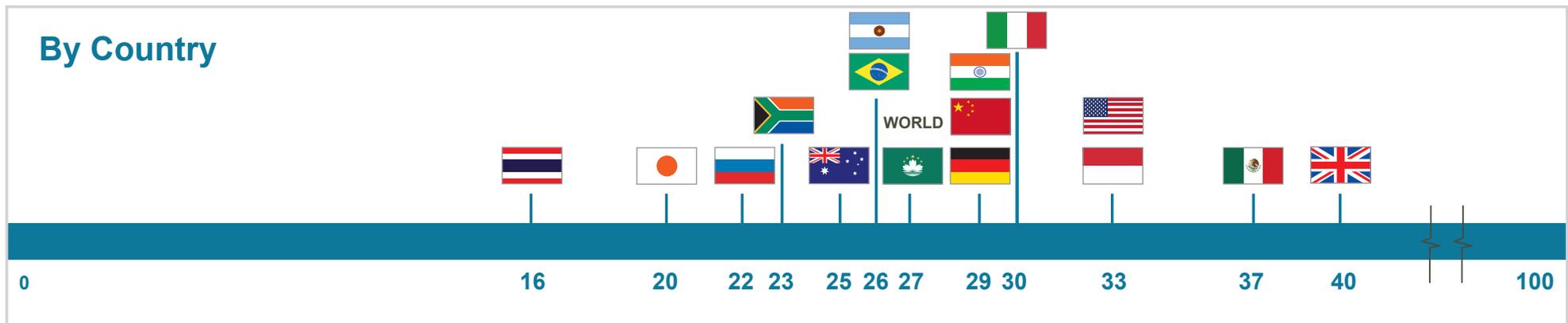
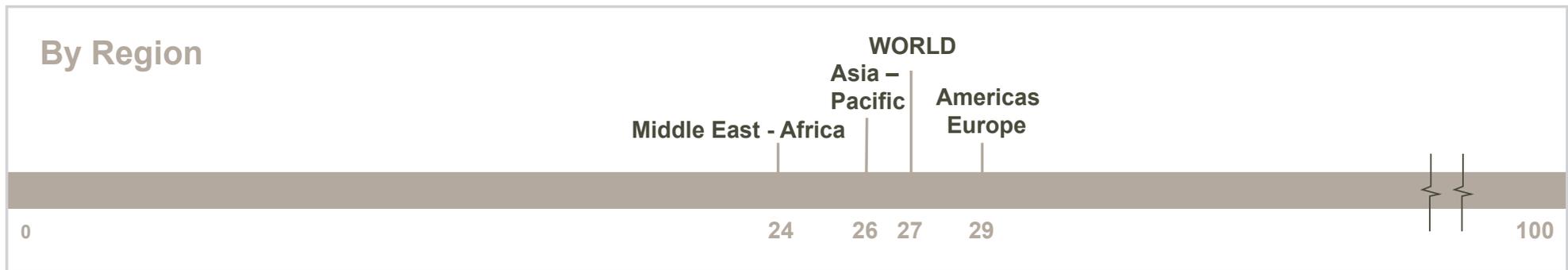
The following pages show the global results, followed by detailed results.



# Digitisation: detail by region and type of activity

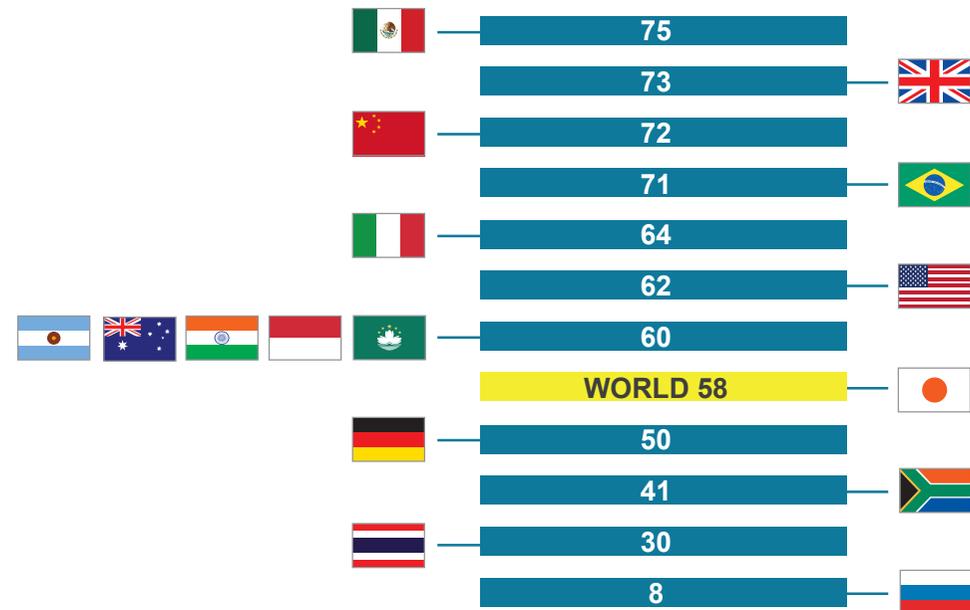


Aggregating the status of all digitisation activities, this index shows how far different exhibition industry markets around the world currently have progressed towards full digitisation.



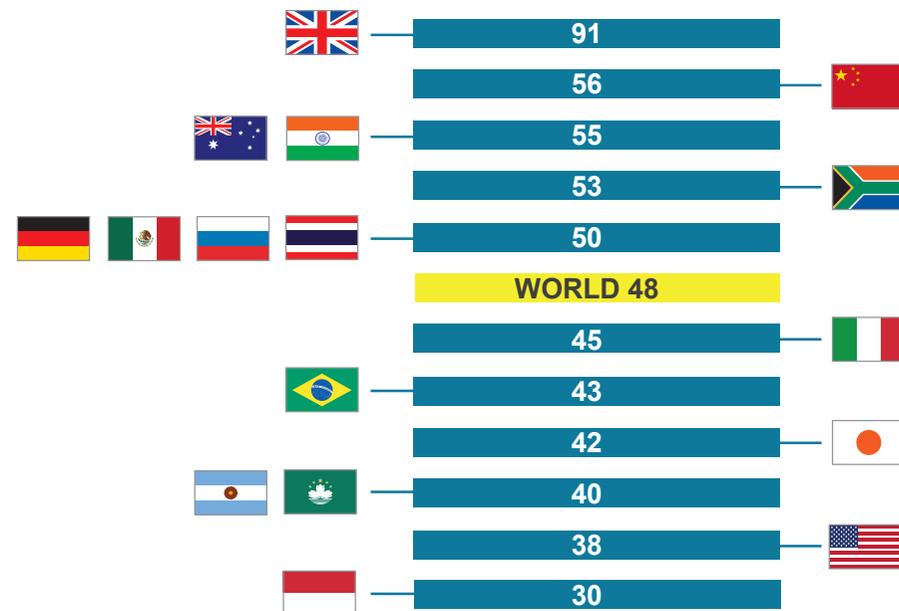
To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have added digital services / products around existing exhibitions (like apps, digital advertising, digital signage)."*



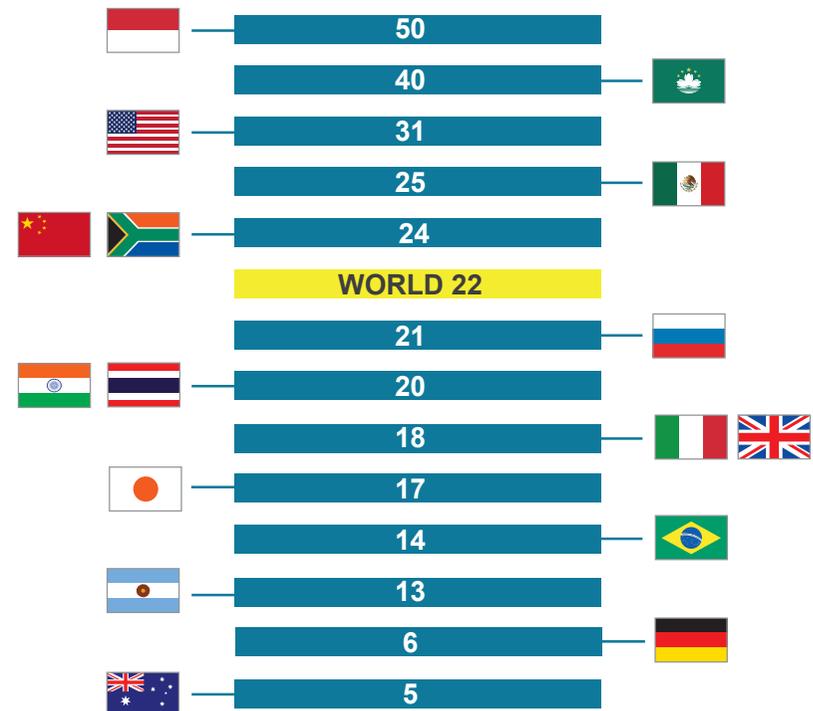
To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have changed internal processes and workflows in our company into digital processes."*



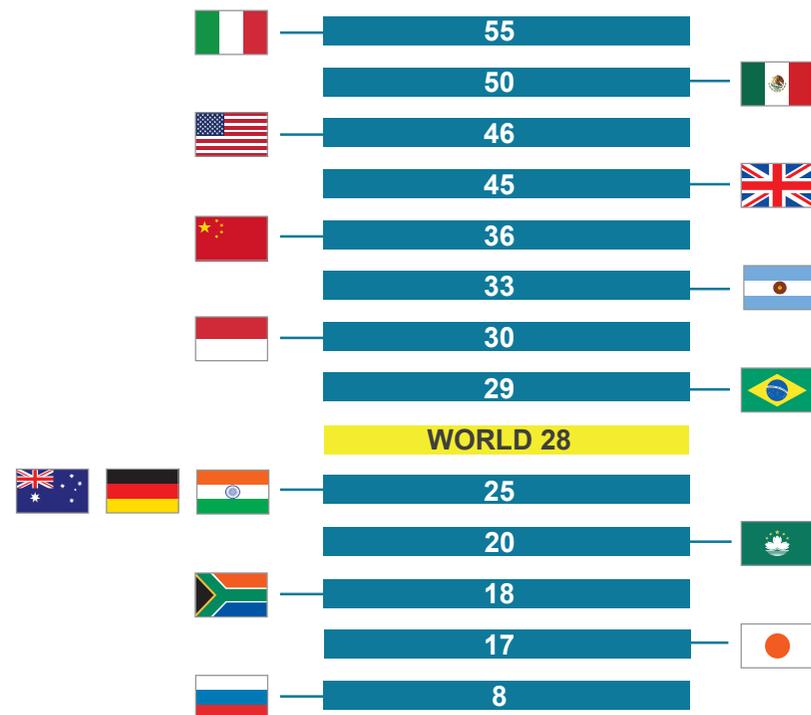
To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have developed a digital / transformation strategy for individual exhibitions / products."*



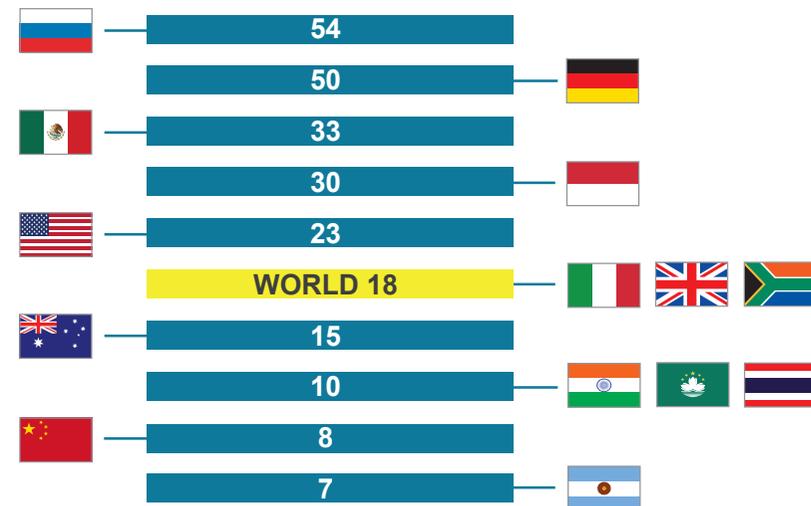
To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have developed a digital / transformation strategy for the whole company."*



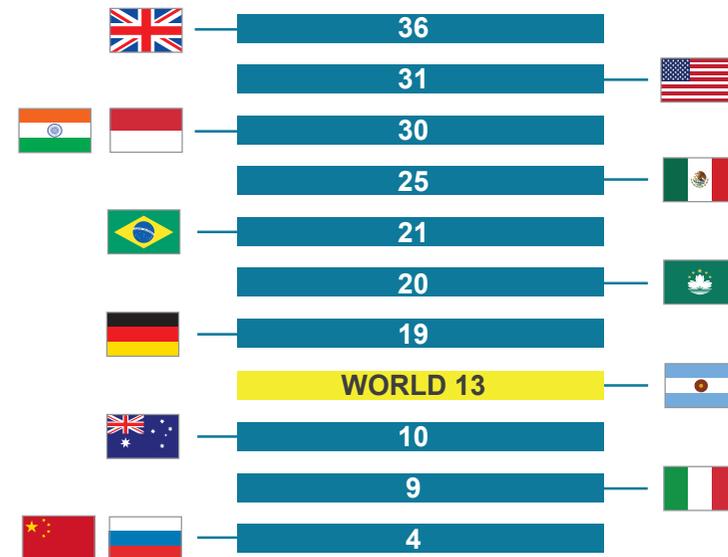
To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have created a designated function in the upper/top management (like a CDO, Head of Digital, etc)."*



To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

*"Yes, we have launched digital products not directly related to existing exhibitions."*



# Part 2: Detailed results

## North America:

Mexico  
US

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## Central and South America:

Argentina  
Brazil  
Other countries in Central & South America

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## Europe:

Germany  
Italy  
Russia  
United Kingdom  
Other countries in Europe

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## Africa:

South Africa

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## Middle East:

Middle East

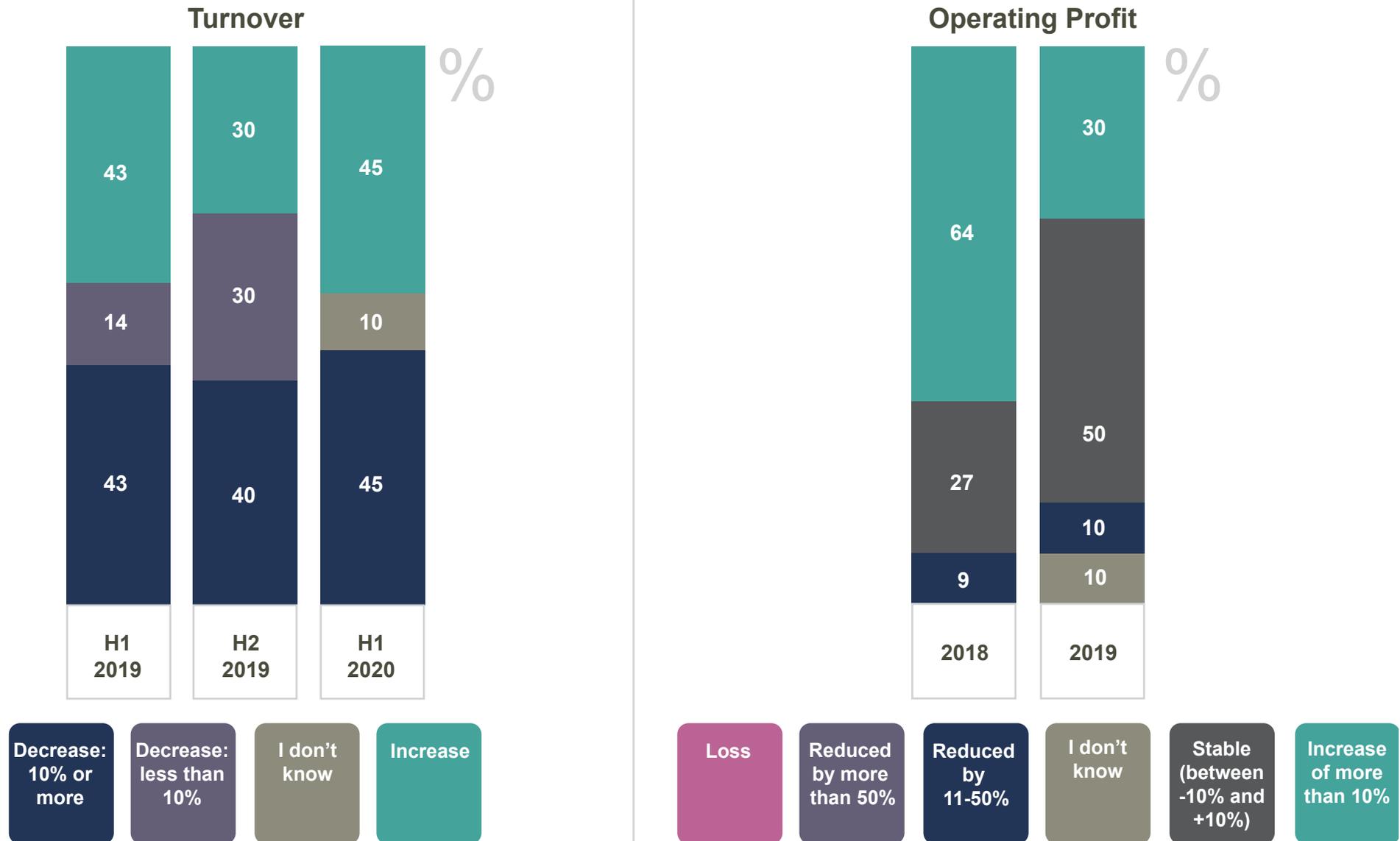
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## Asia - Pacific:

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



## Financial expectations of Mexican exhibition companies compared to previous years

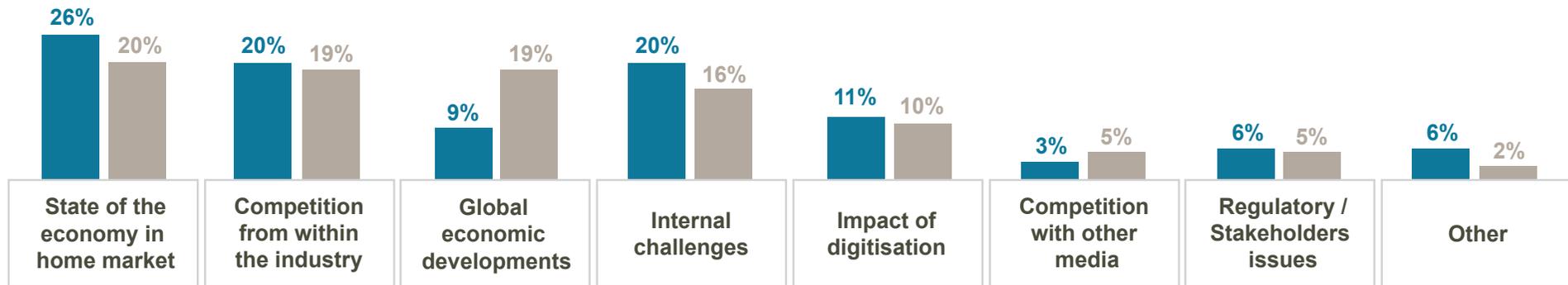




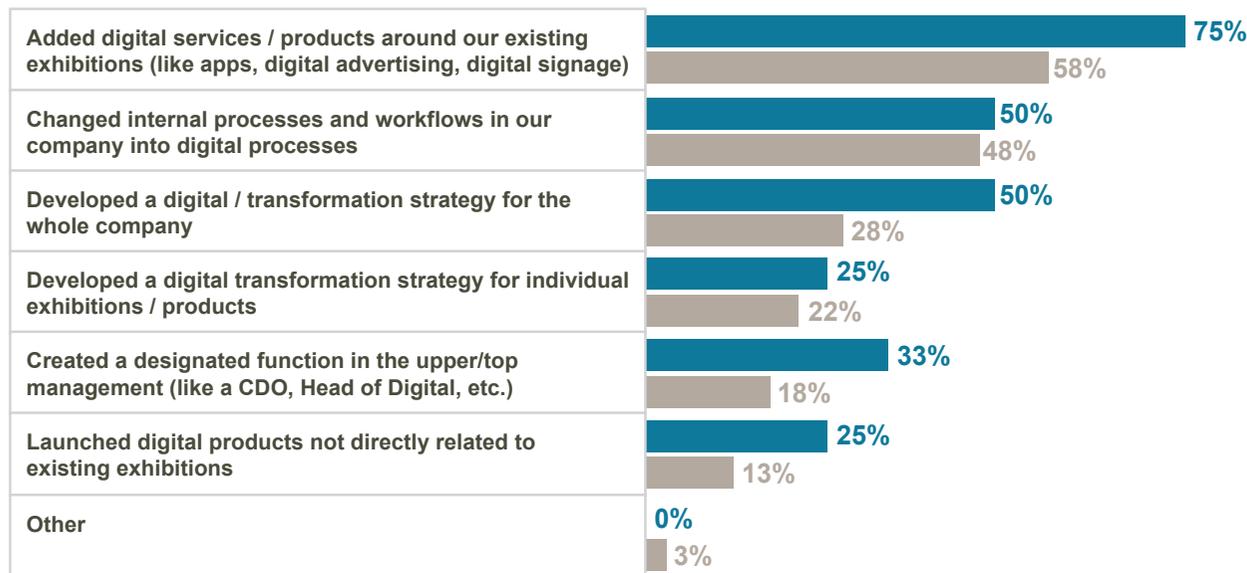
## Most important business issues in the exhibition industry in Mexico and globally

Mexico

Global

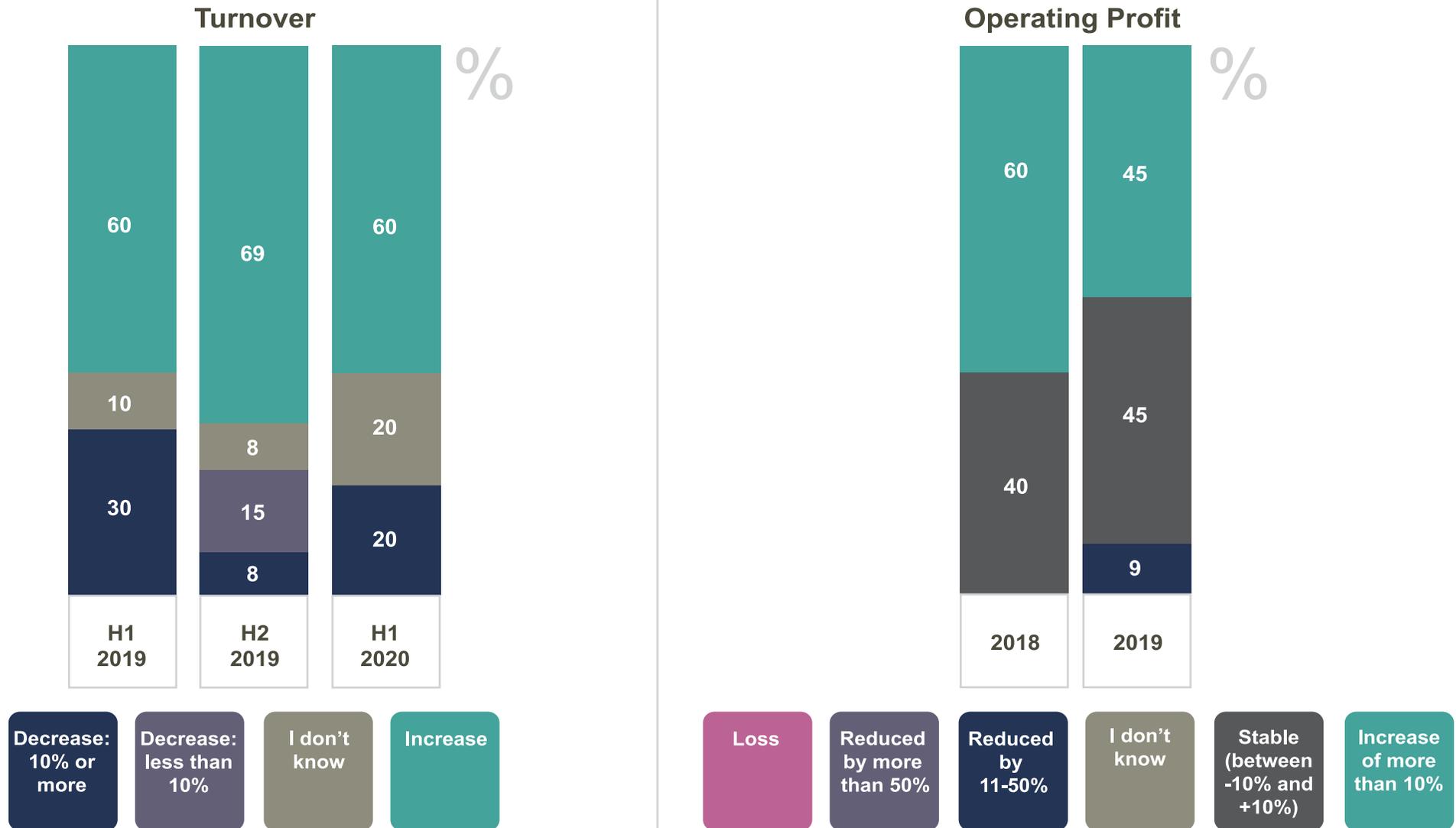


## Digitisation: implementation in Mexico and globally





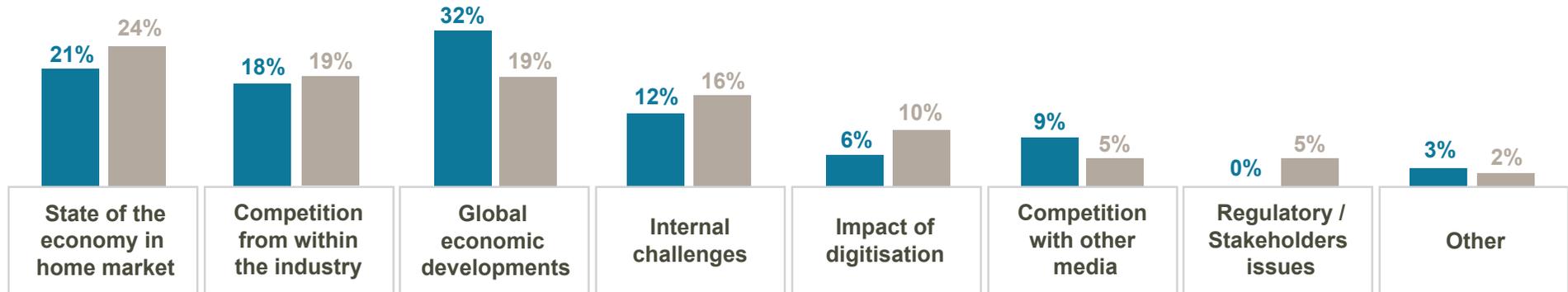
## Financial expectations of US exhibition companies compared to previous years





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

US Global

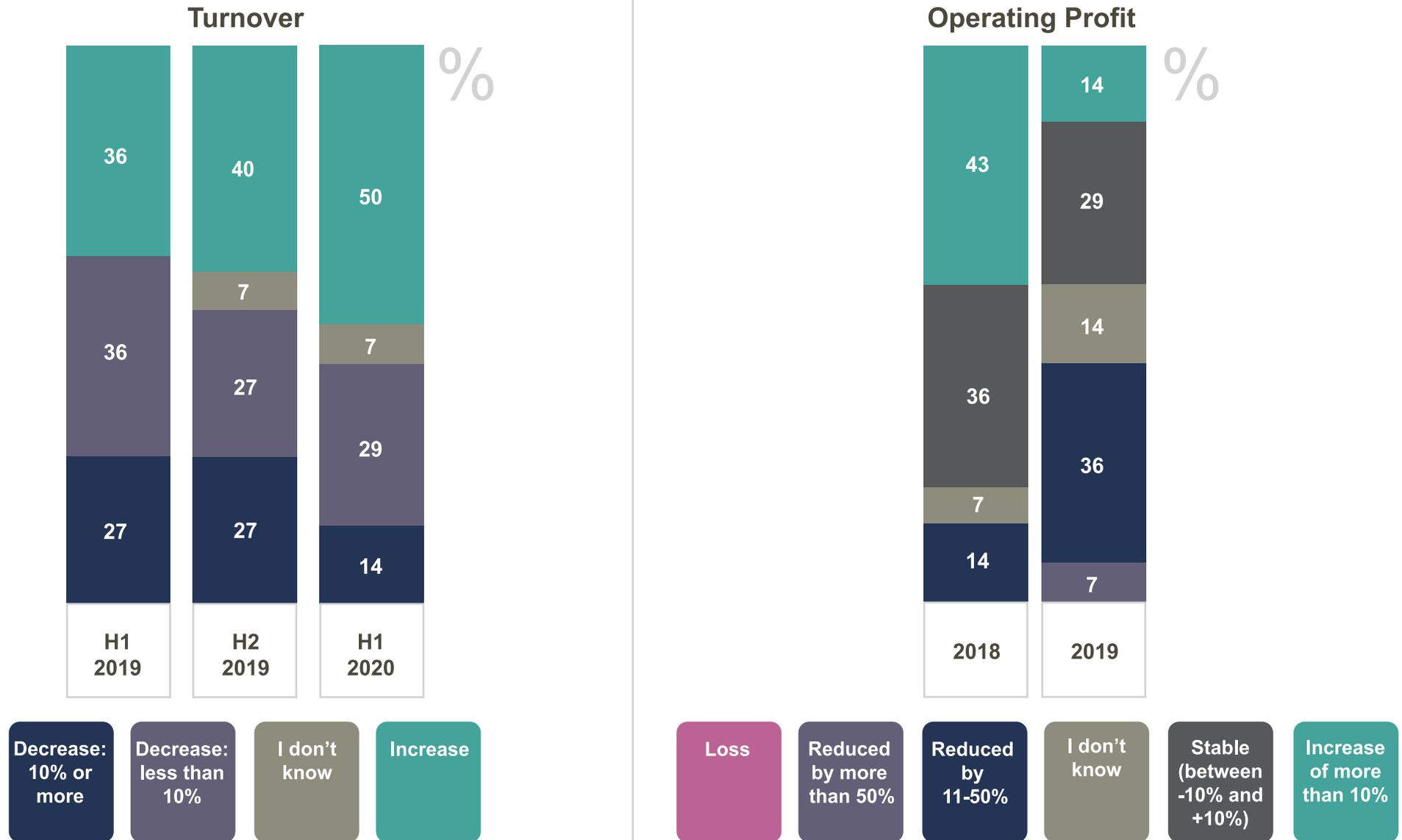


## Digitisation: implementation in US and globally





## Financial expectations of Argentinian exhibition companies compared to previous years

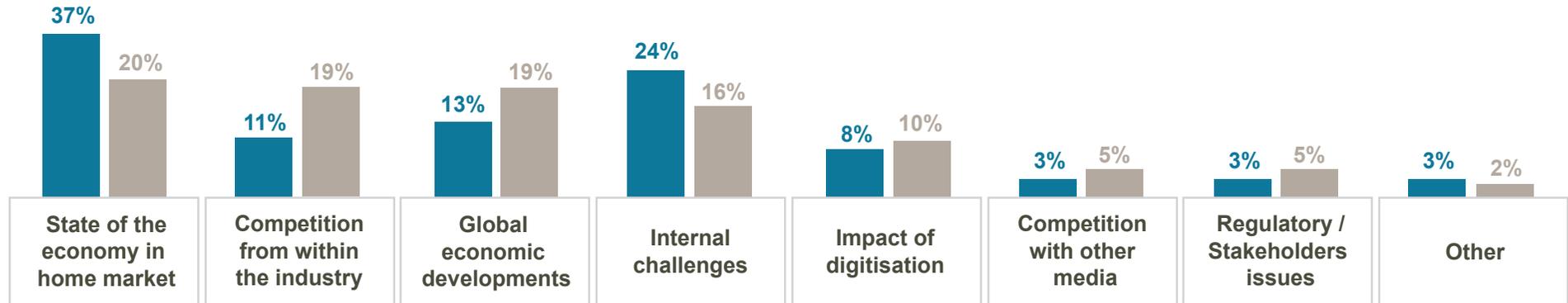


# Detailed results for Argentina



## Most important business issues in the exhibition industry in Argentina and globally

Argentina Global

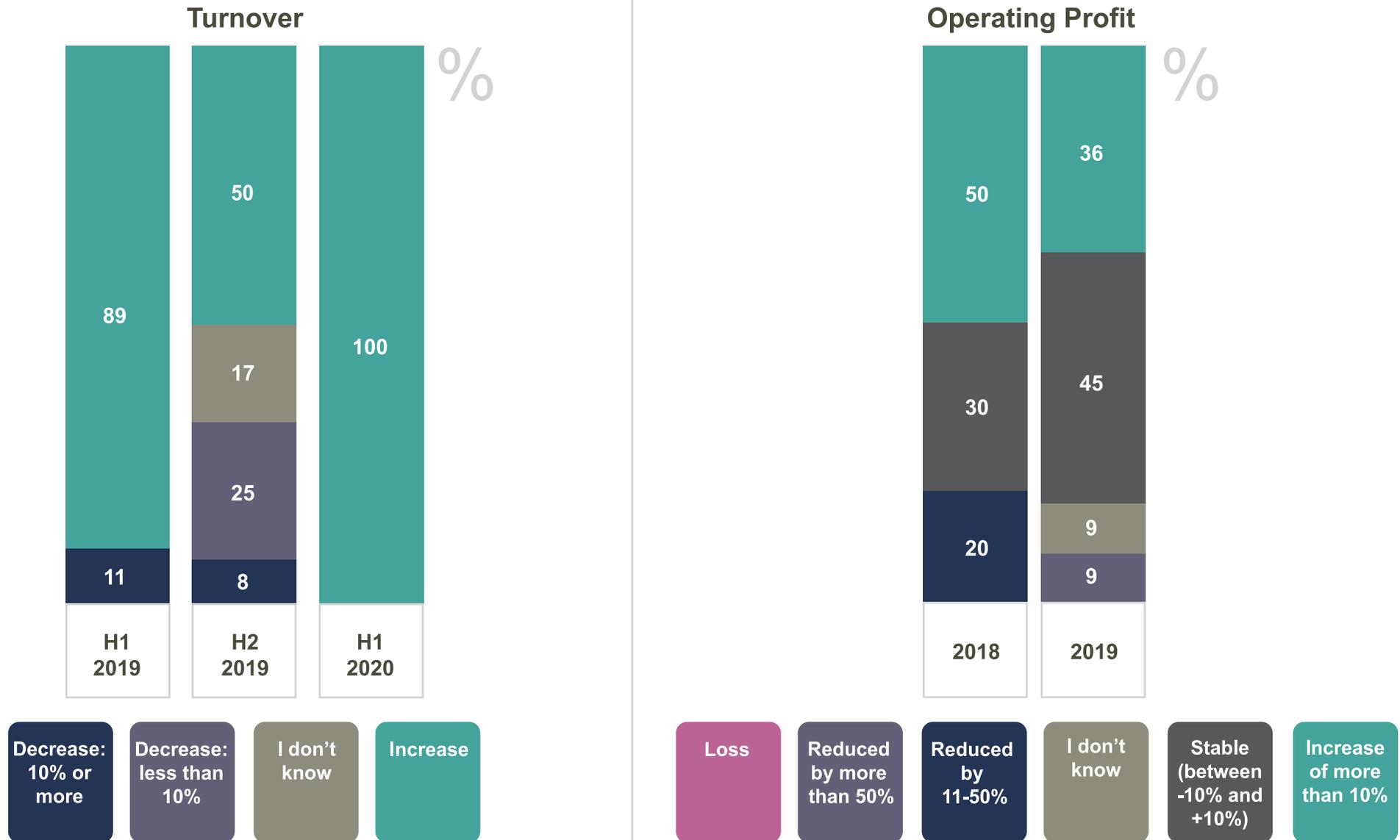


## Digitisation: implementation in Argentina and globally





## Financial expectations of Brazilian exhibition companies compared to previous years

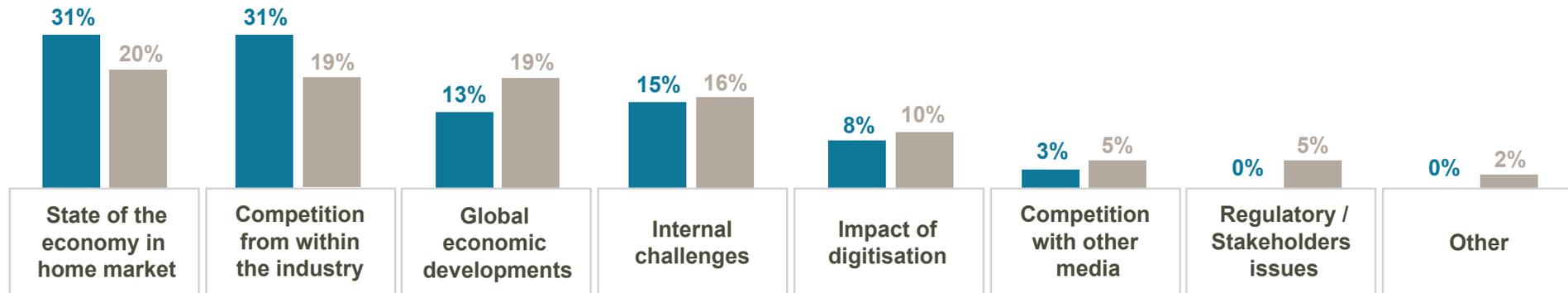




## Most important business issues in the exhibition industry in Brazil and globally

Brazil

Global

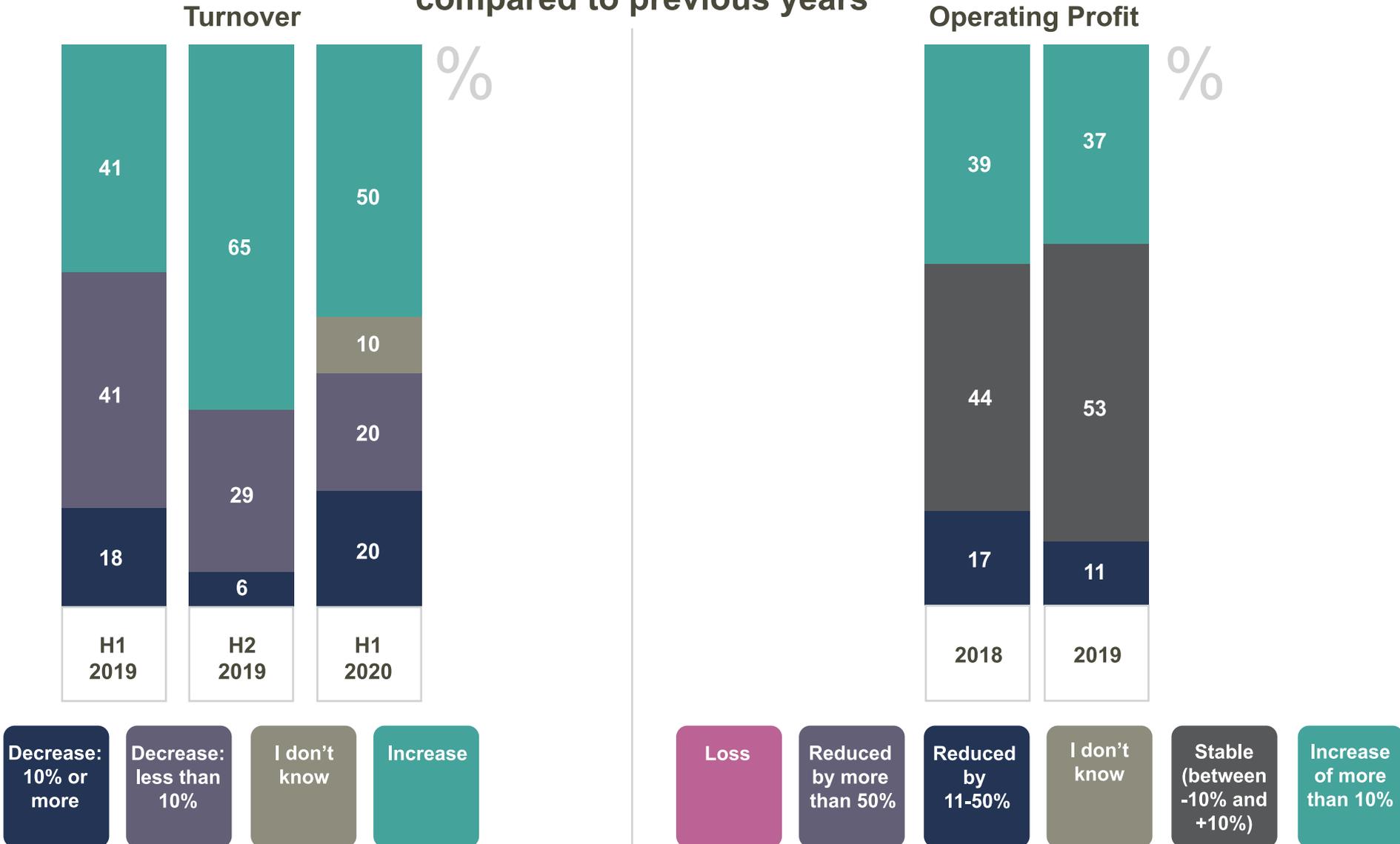


## Digitisation: implementation in Brazil and globally



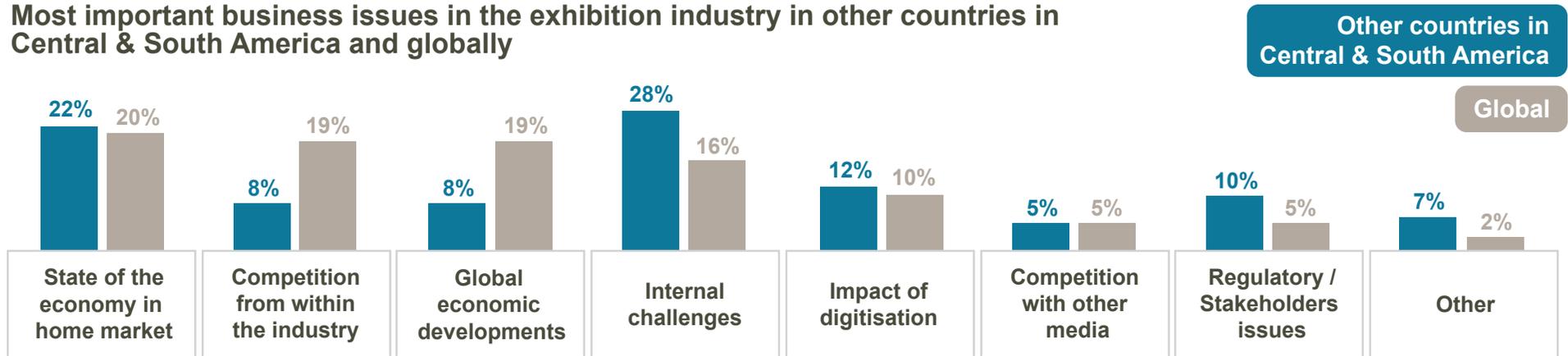
# Detailed results for other countries in Central & South America

## Financial expectations of exhibition companies from other countries in Central & South America compared to previous years

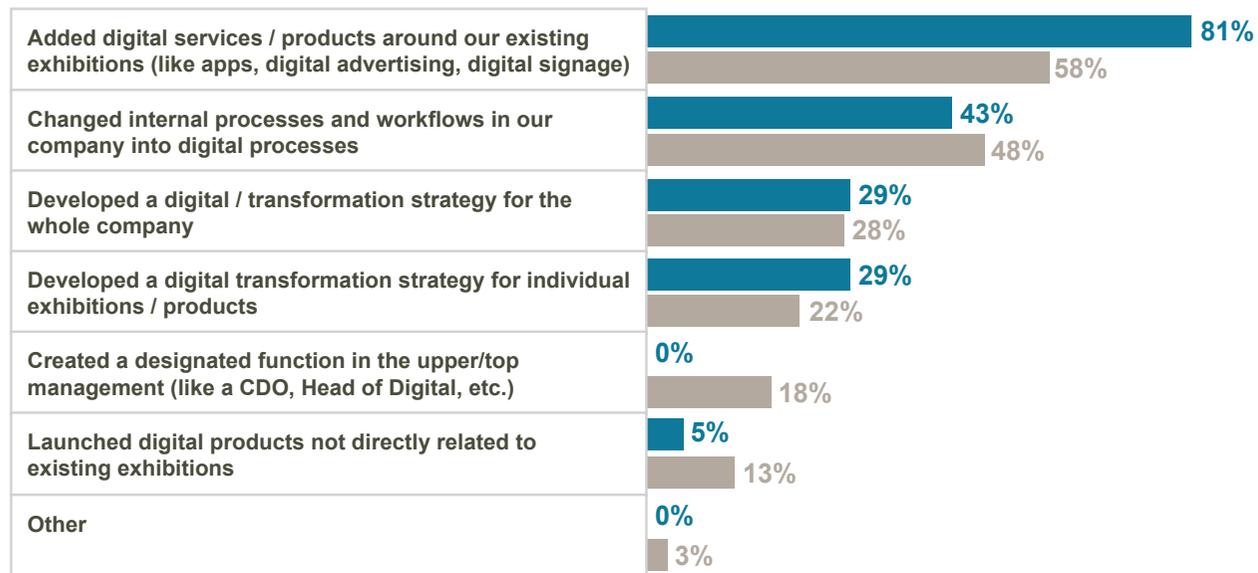


# Detailed results for other countries in Central & South America

## Most important business issues in the exhibition industry in other countries in Central & South America and globally

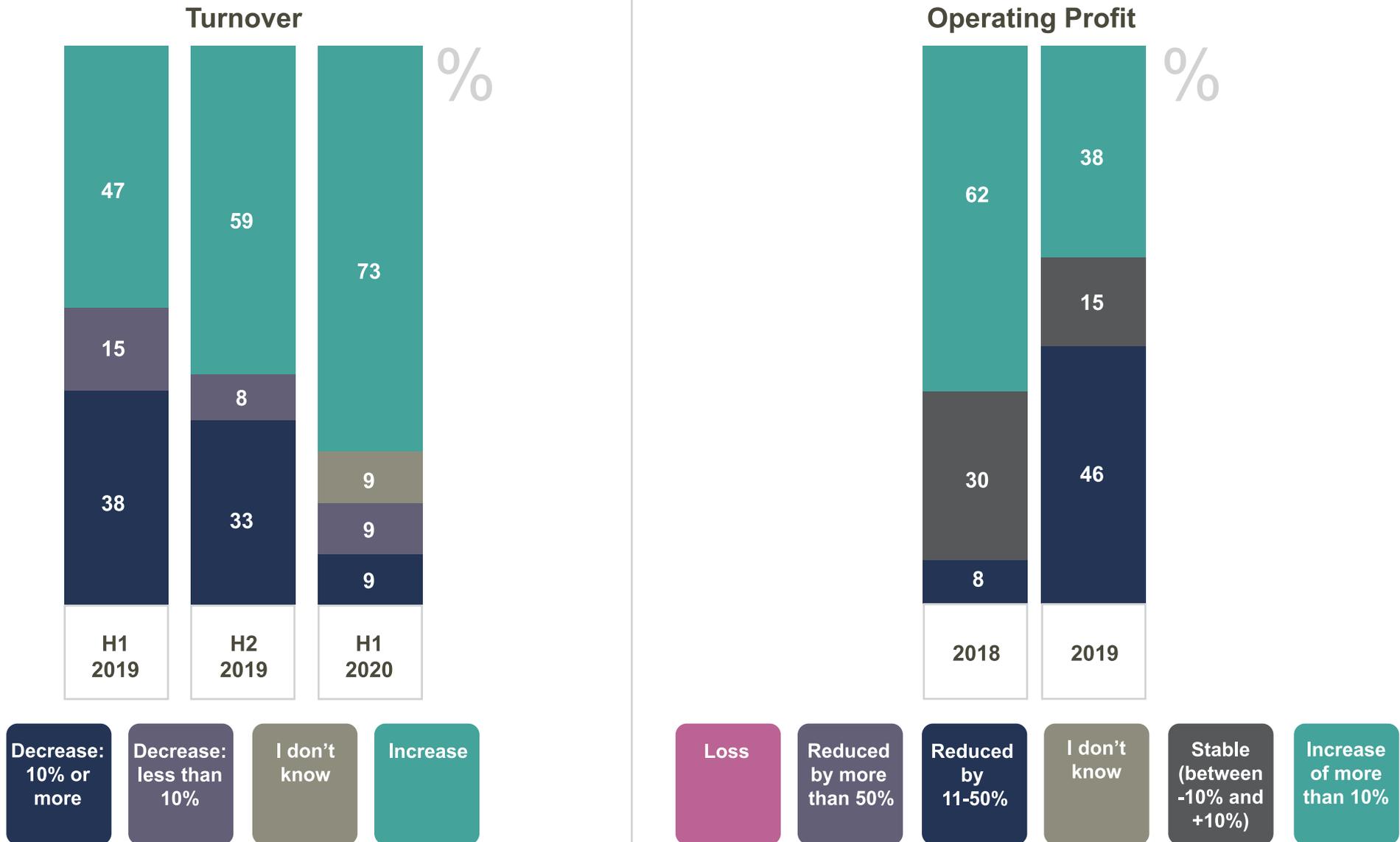


## Digitisation: implementation in other countries in Central & South America and globally





## Financial expectations of German exhibition companies compared to previous years

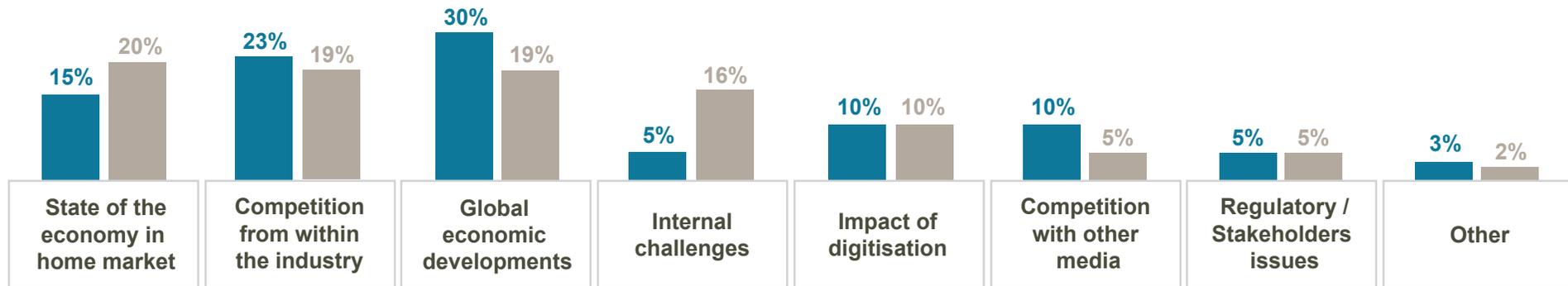


# Detailed results for Germany

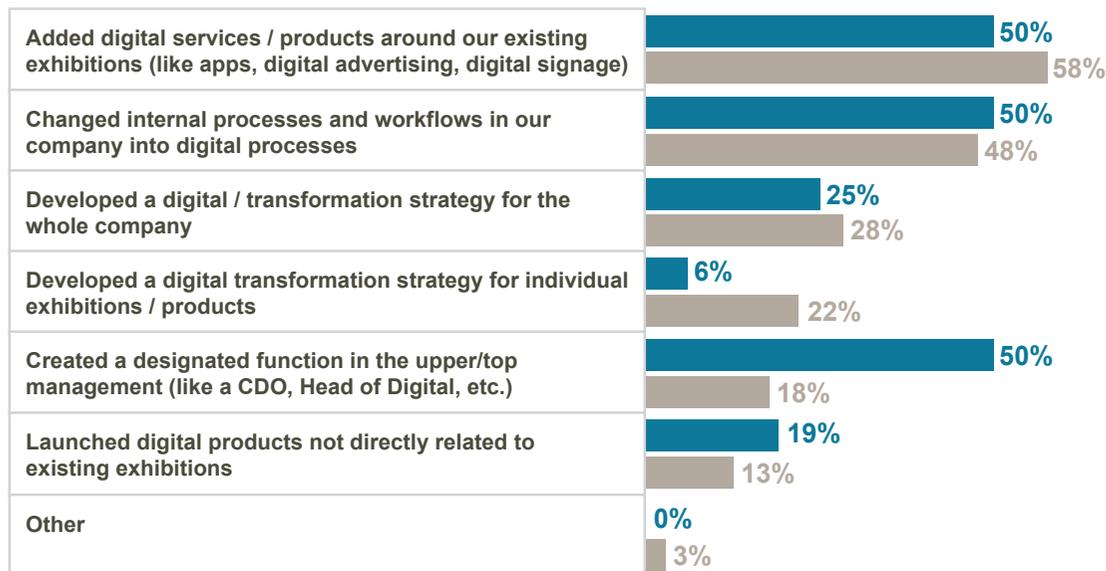


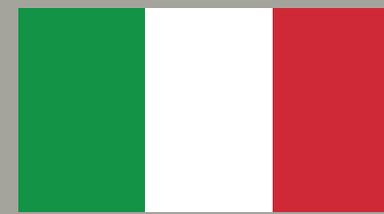
## Most important business issues in the exhibition industry in Germany and globally

Germany Global

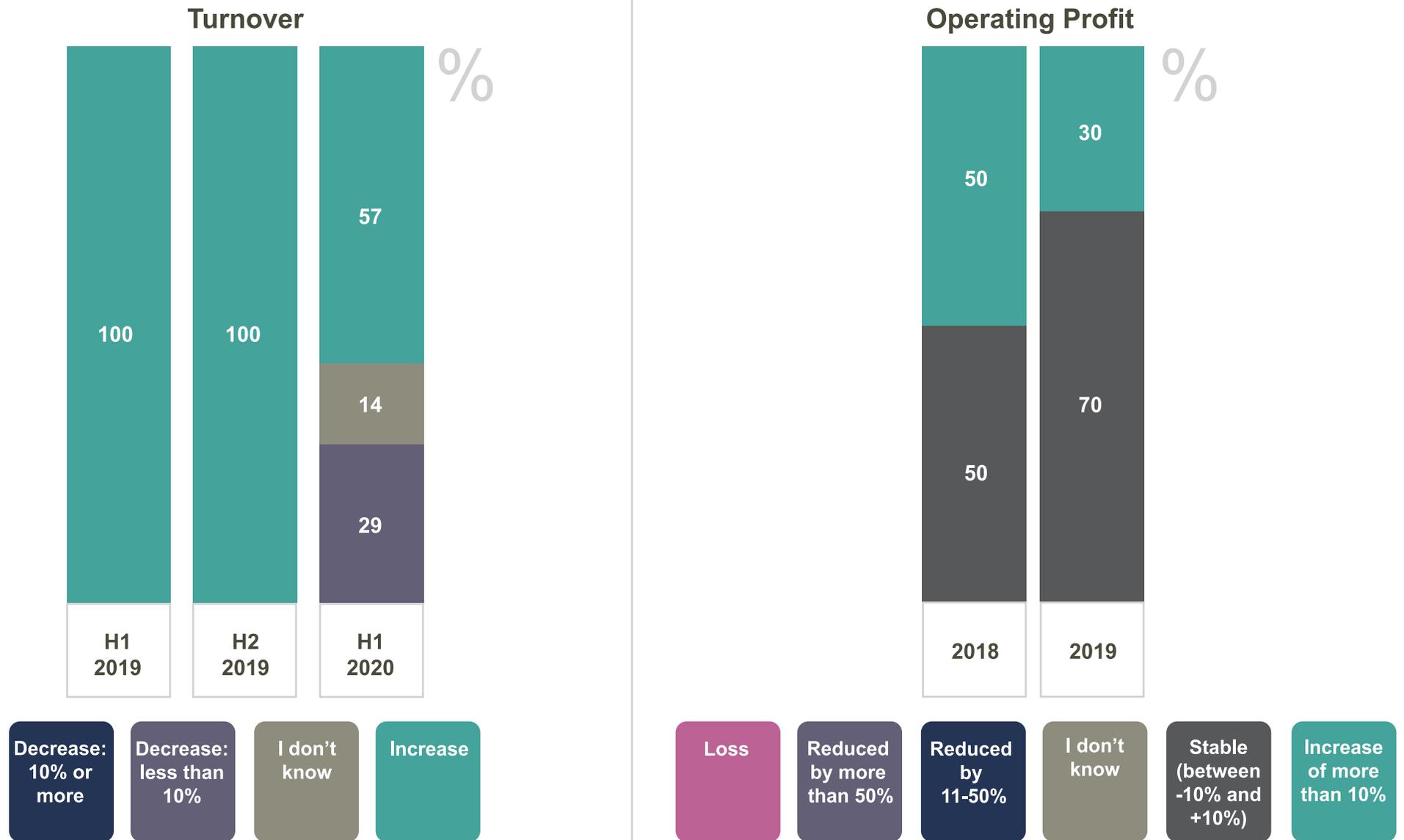


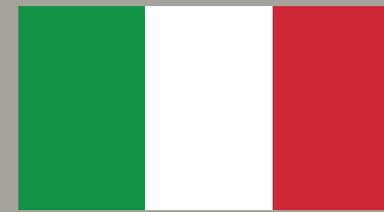
## Digitisation: implementation in Germany and globally





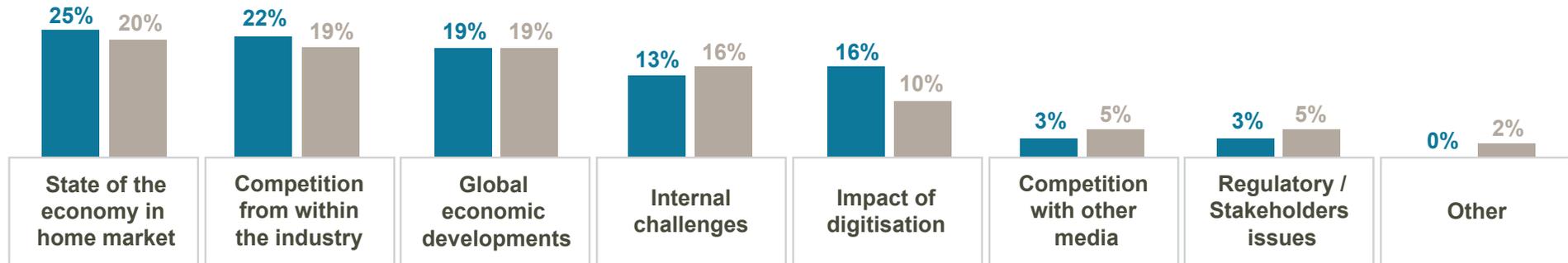
## Financial expectations of Italian exhibition companies compared to previous years





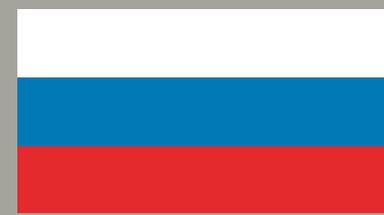
## Most important business issues in the exhibition industry in Italy and globally

**Italy** Global

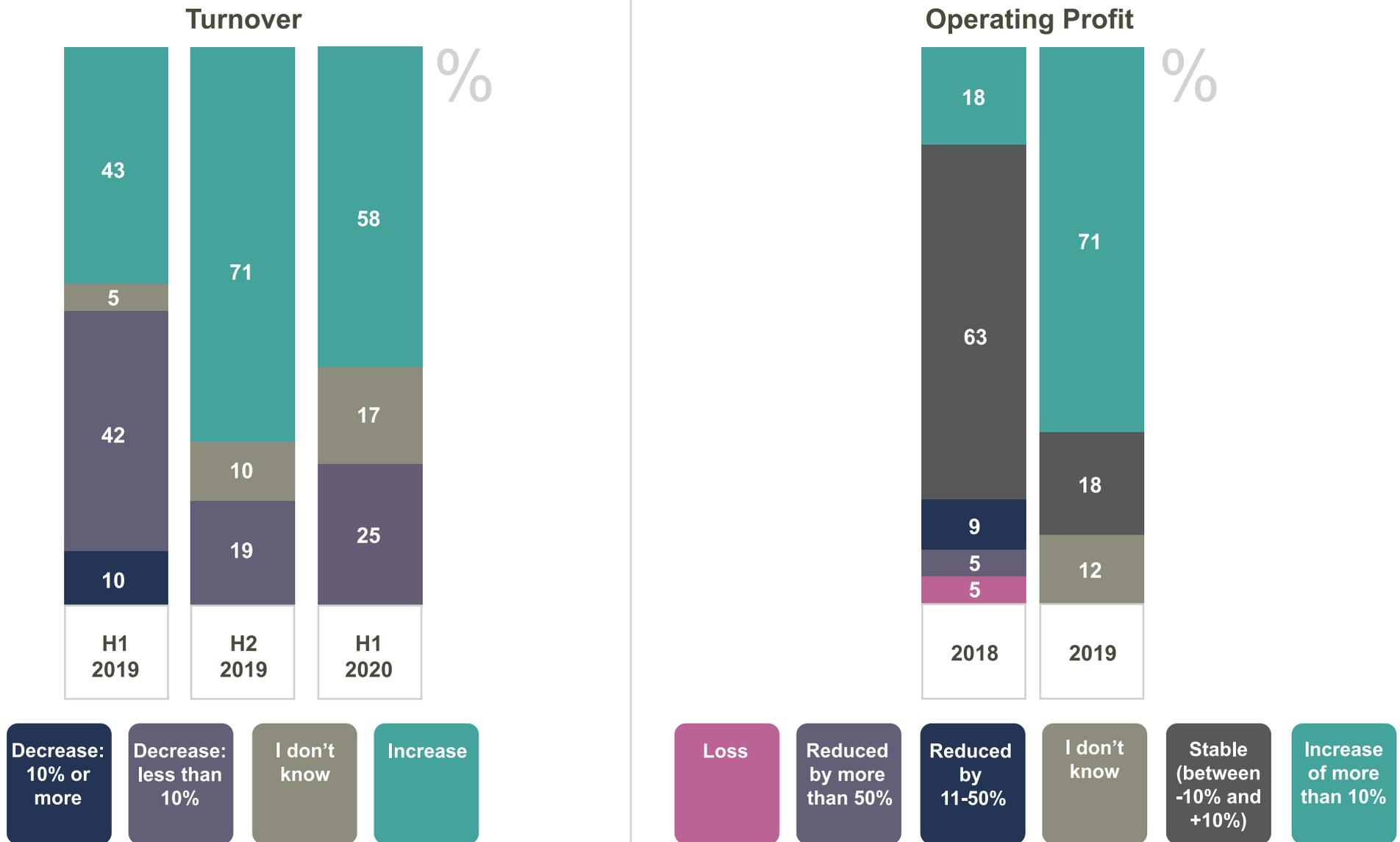


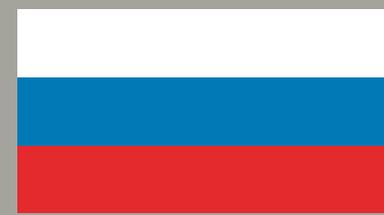
## Digitisation: implementation in Italy and globally





## Financial expectations of Russian exhibition companies compared to previous years

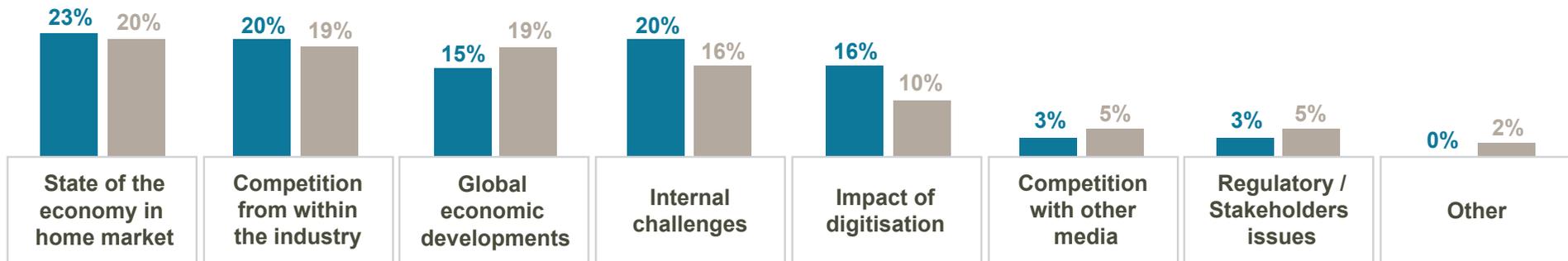




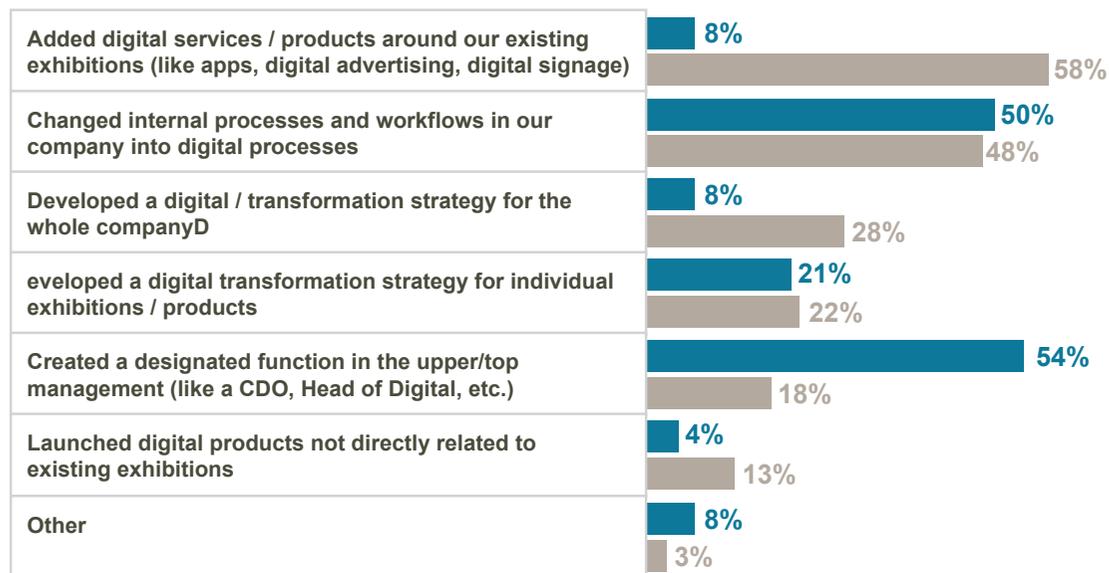
## Most important business issues in the exhibition industry in Russia and globally

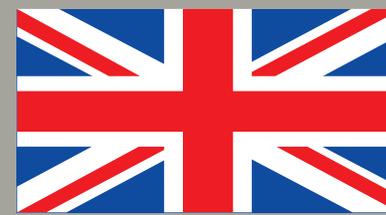
Russia

Global

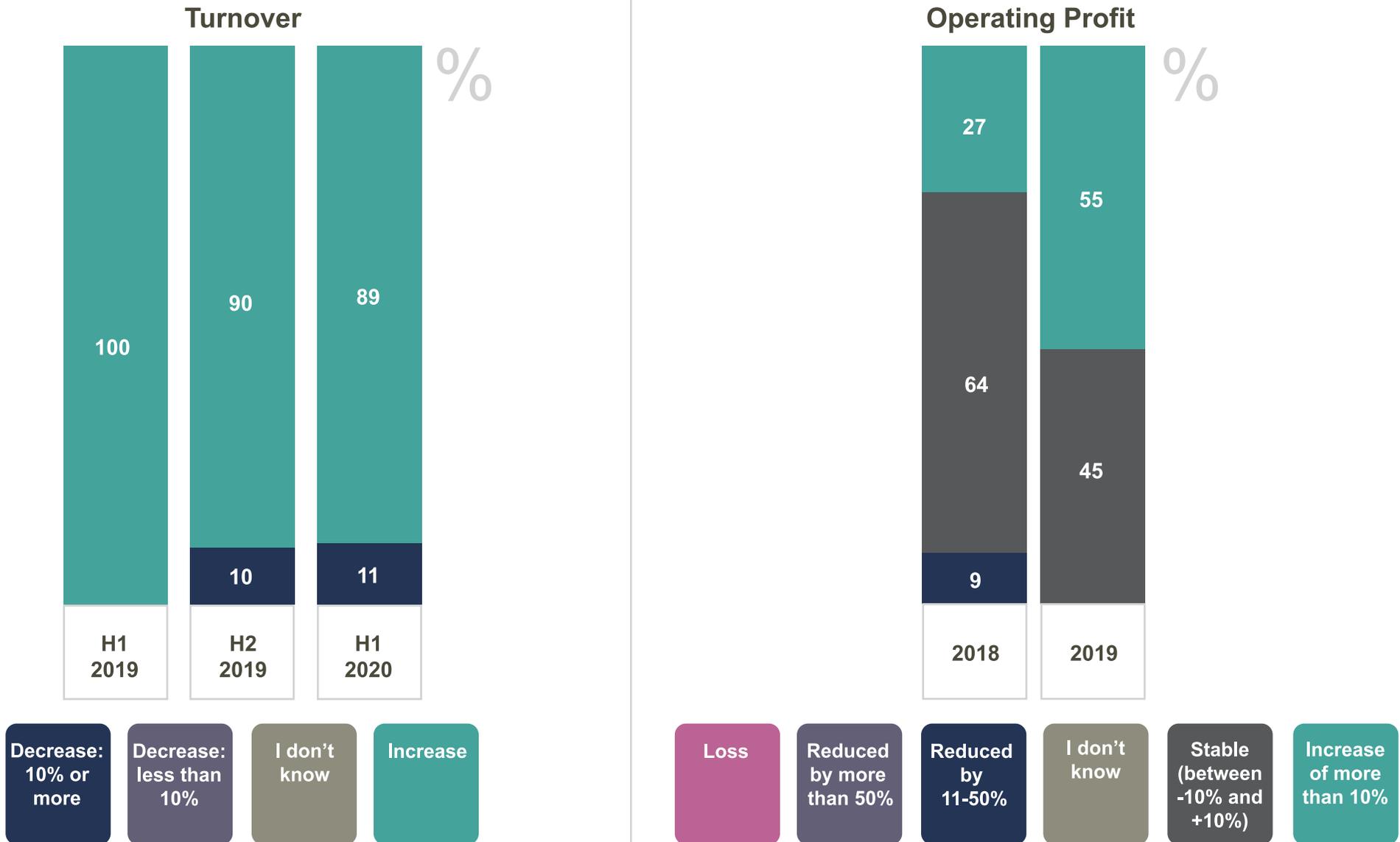


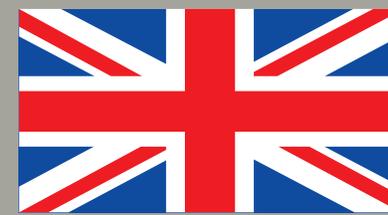
## Digitisation: implementation in Russia and globally





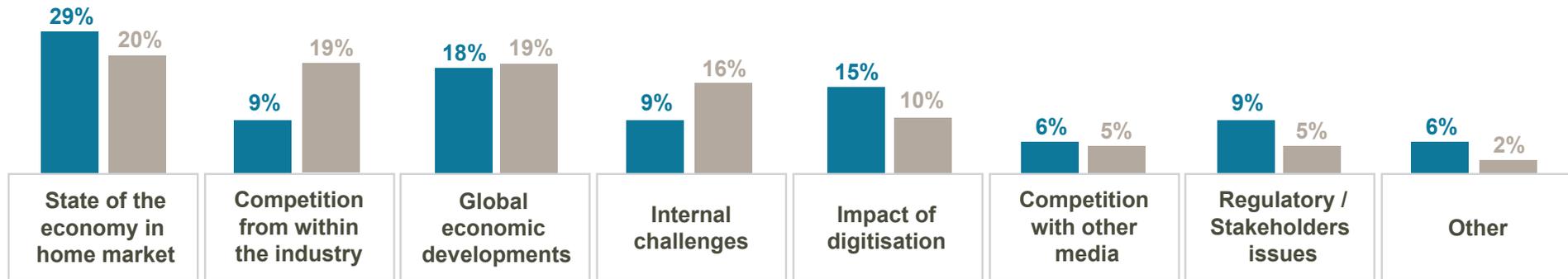
## Financial expectations of UK exhibition companies compared to previous years



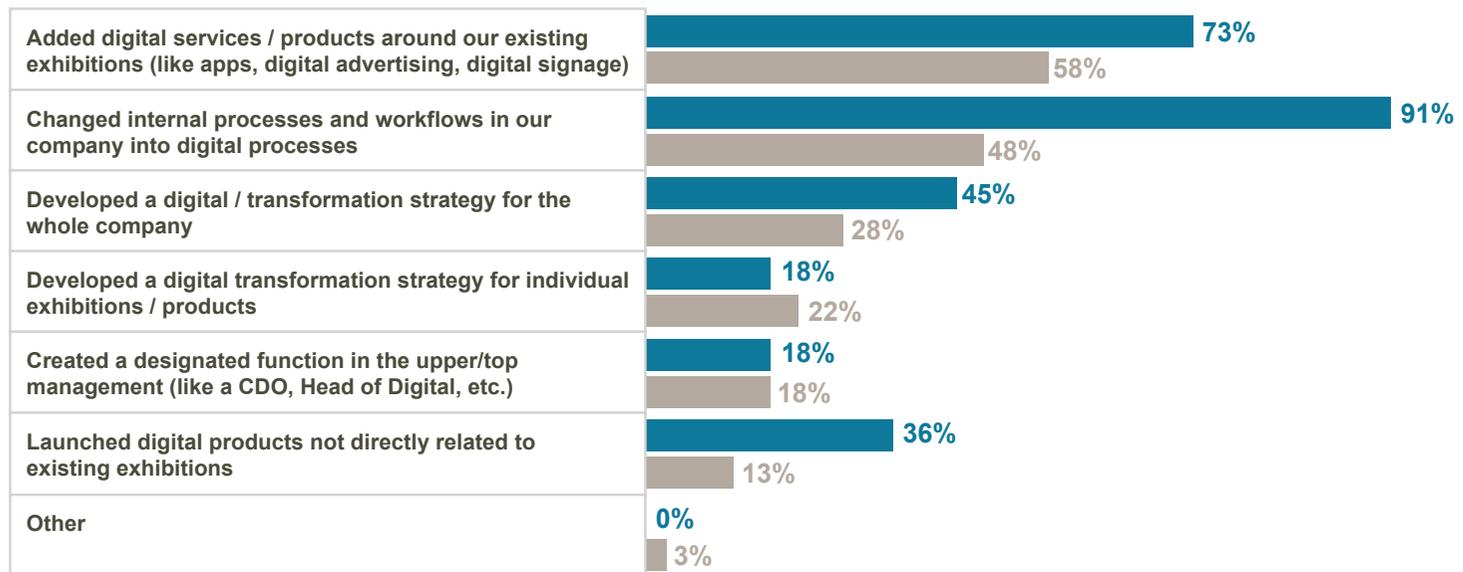


## Most important business issues in the exhibition industry in UK and globally

UK Global

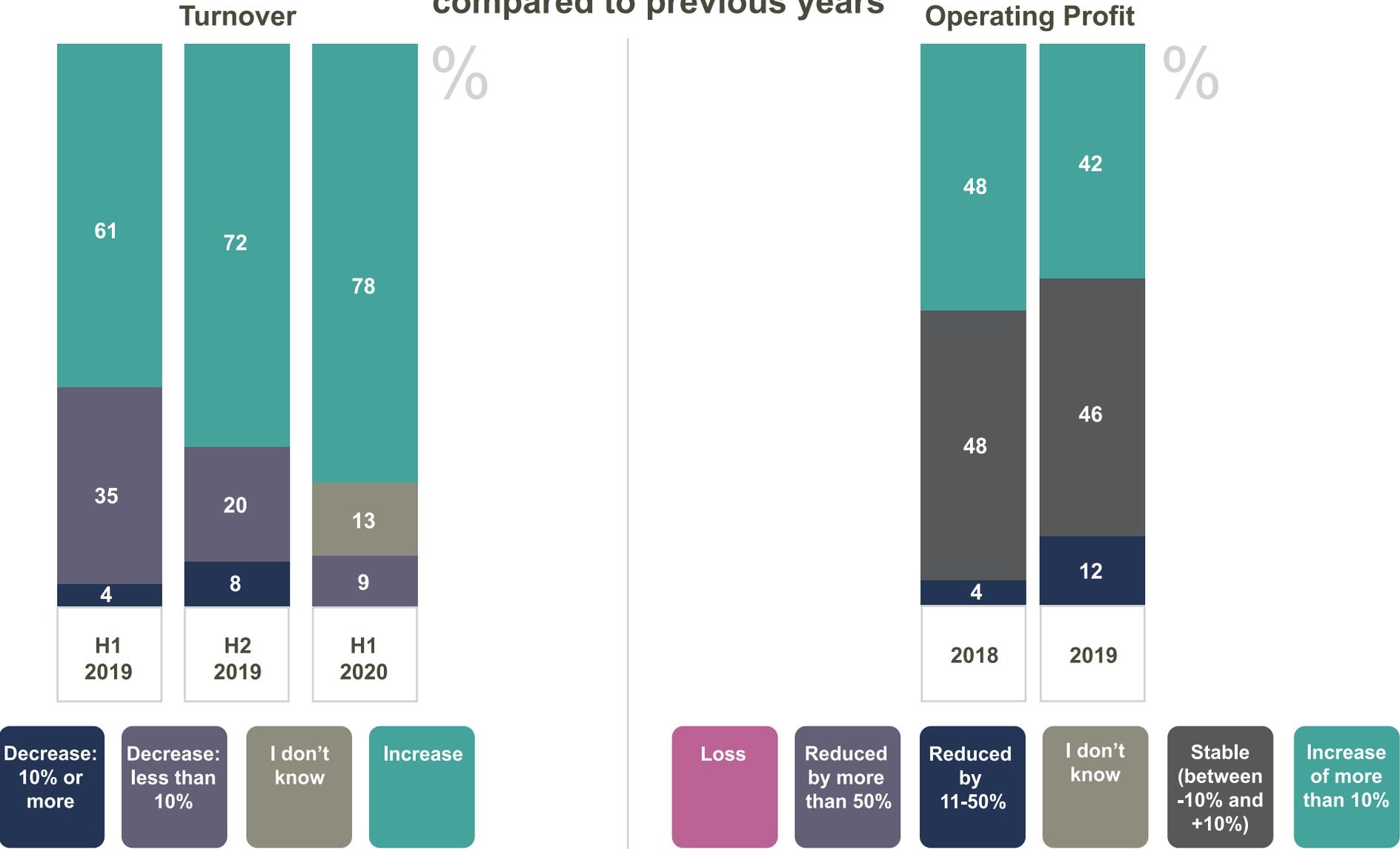


## Digitisation: implementation in UK and globally



# Detailed results for other countries in Europe

## Financial expectations of exhibition companies from other countries in Europe compared to previous years

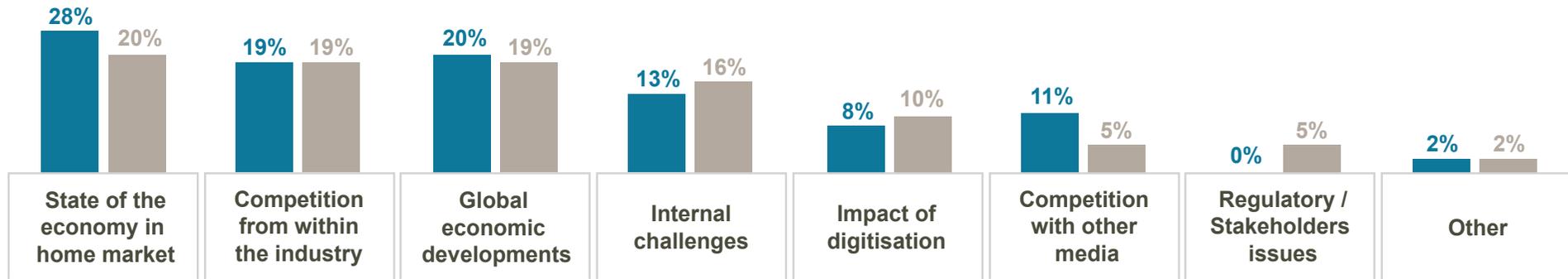


# Detailed results for other countries in Europe

## Most important business issues in the exhibition industry for other countries in Europe and globally

Other Countries in Europe

Global

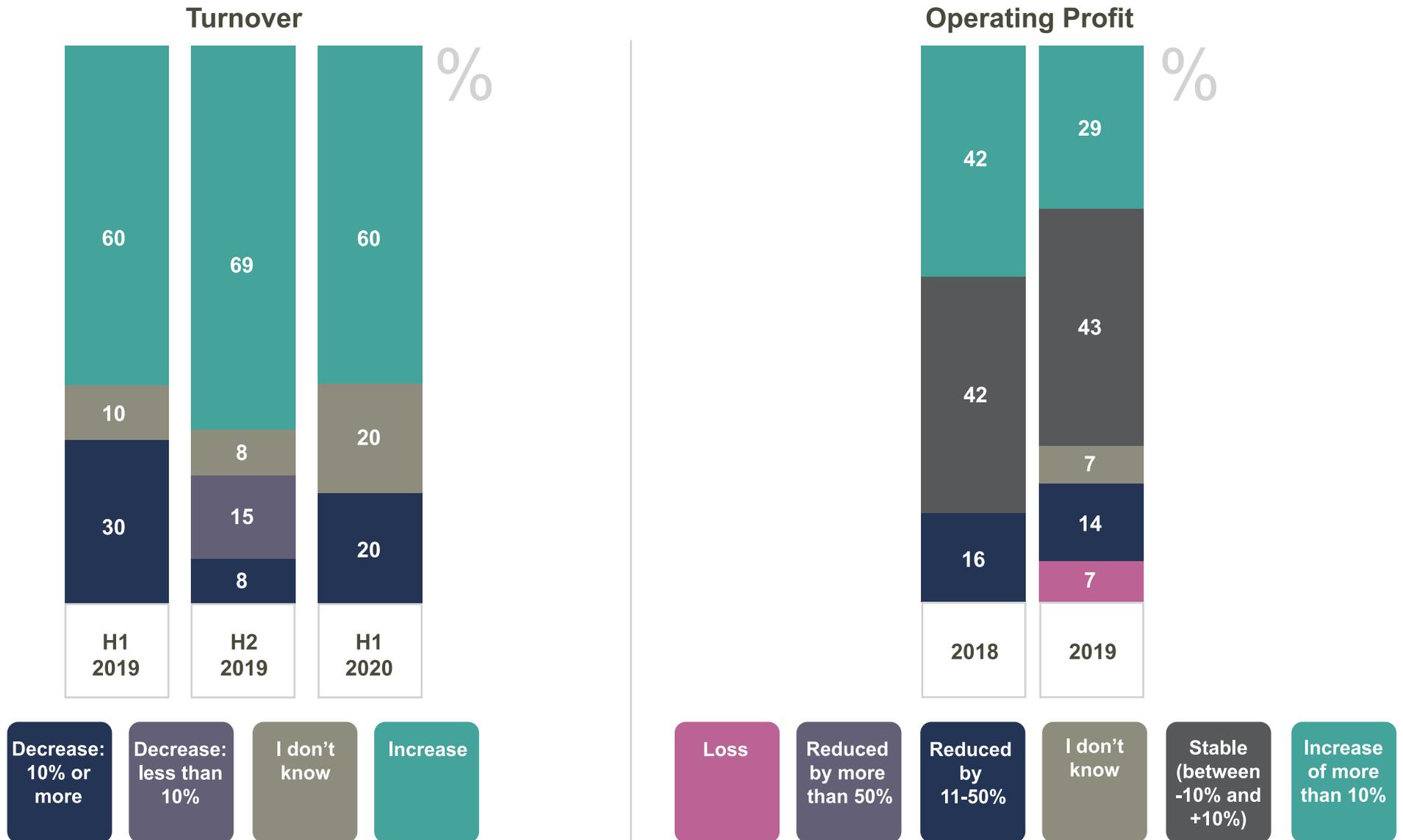


## Digitisation: implementation in other countries in Europe and globally





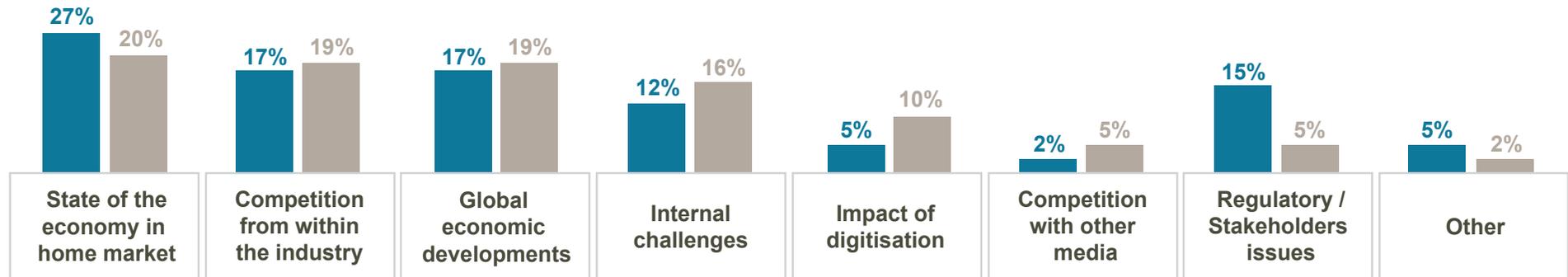
## Financial expectations of South African exhibition companies compared to previous years



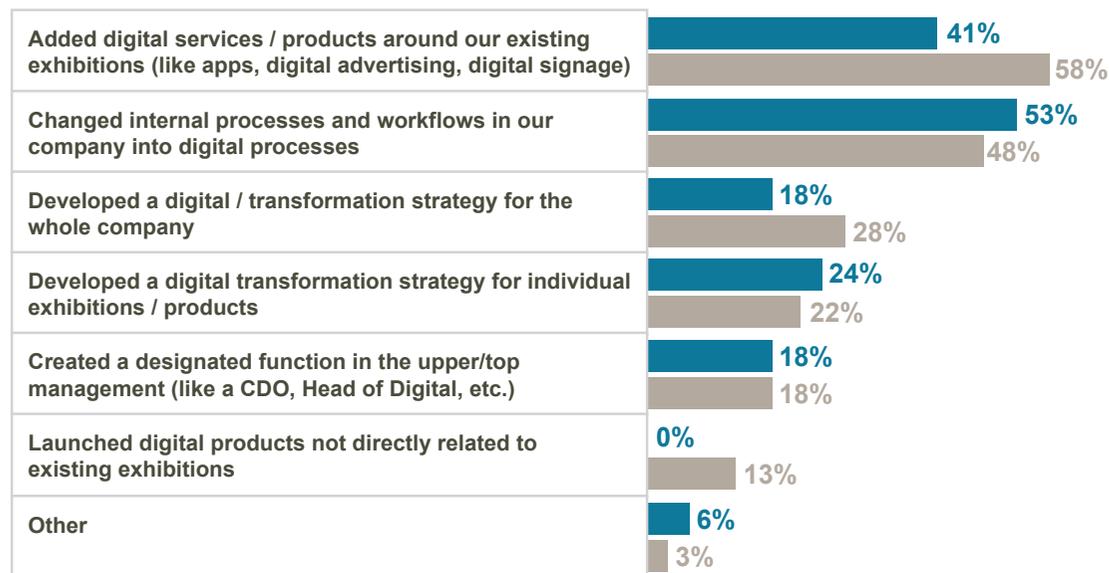


## Most important business issues in the exhibition industry in South Africa and globally

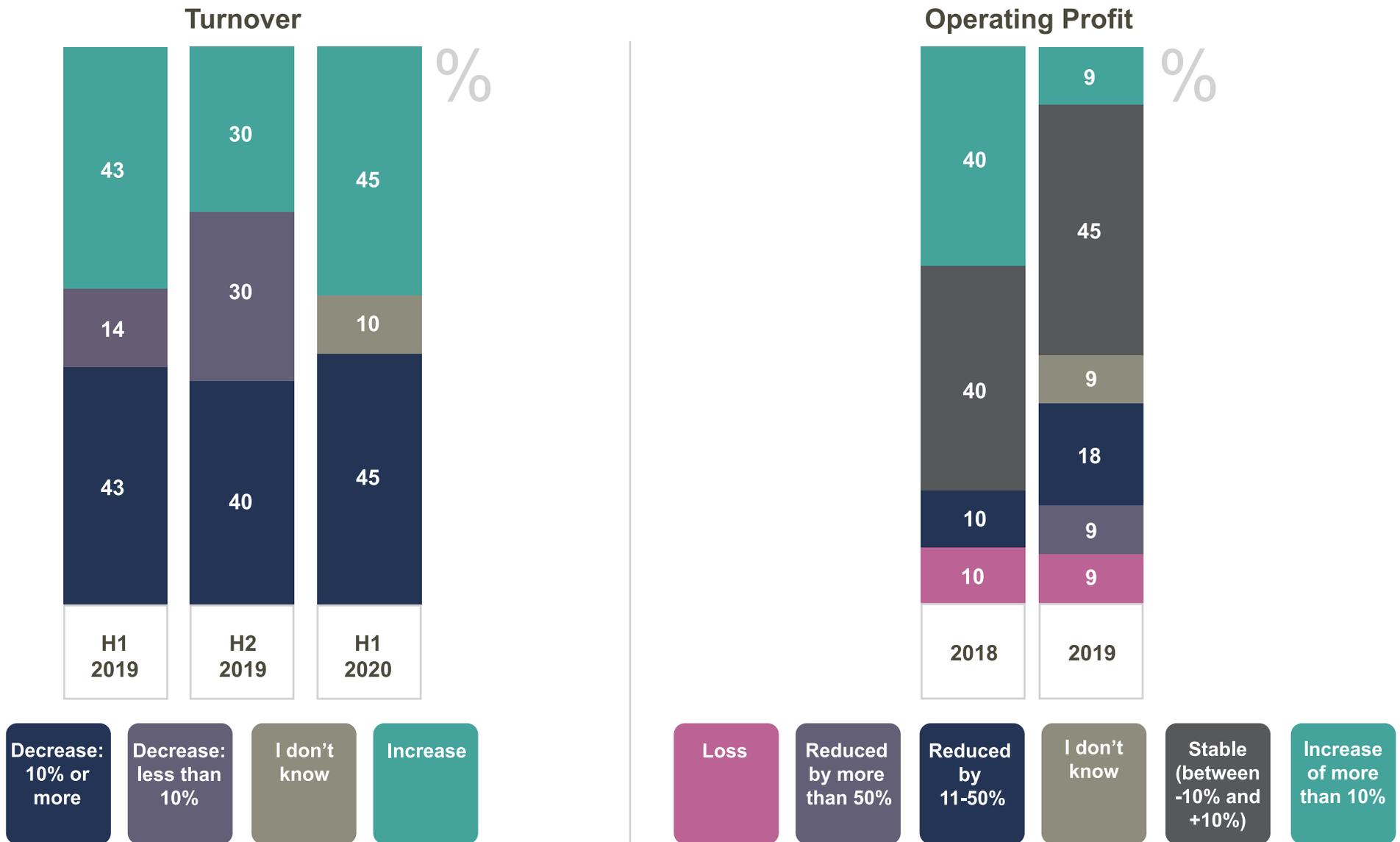
South Africa Global



## Digitisation: implementation in South Africa and globally

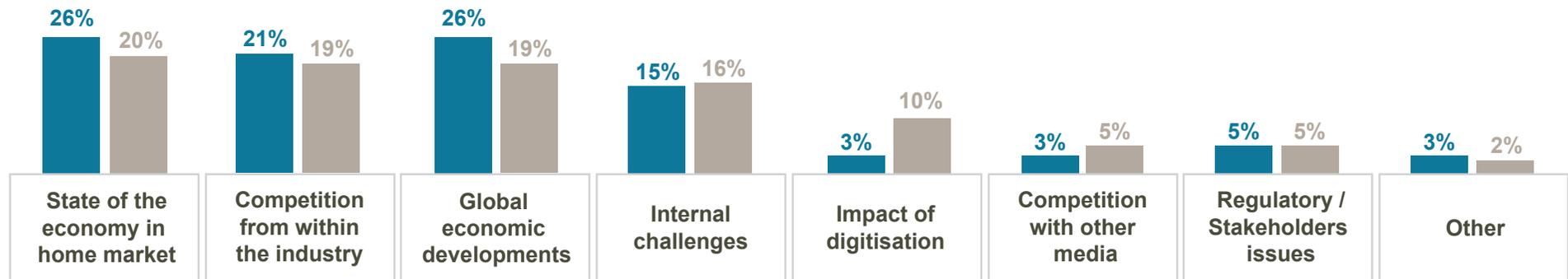


## Financial expectations of Middle East exhibition companies compared to previous years



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

Middle East Global



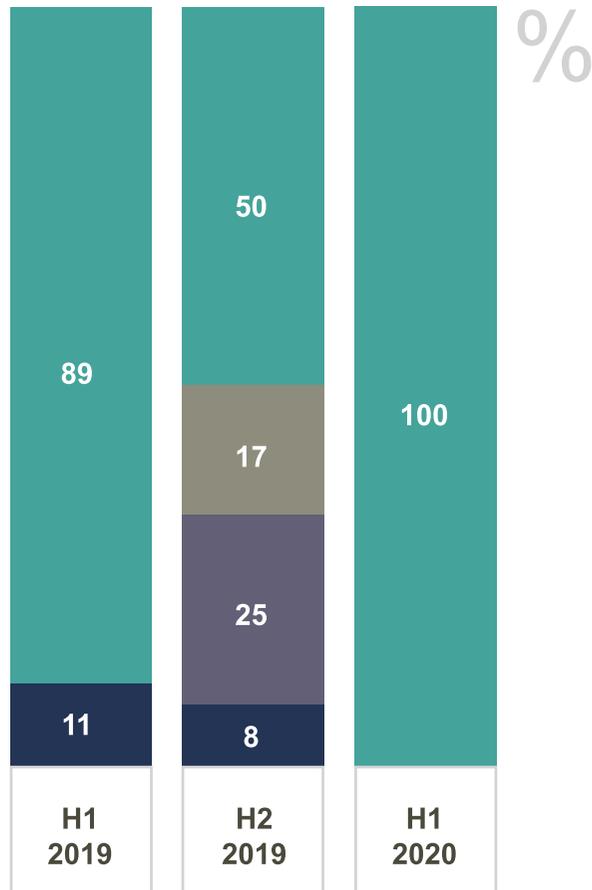
## Digitisation: implementation in the Middle East and globally



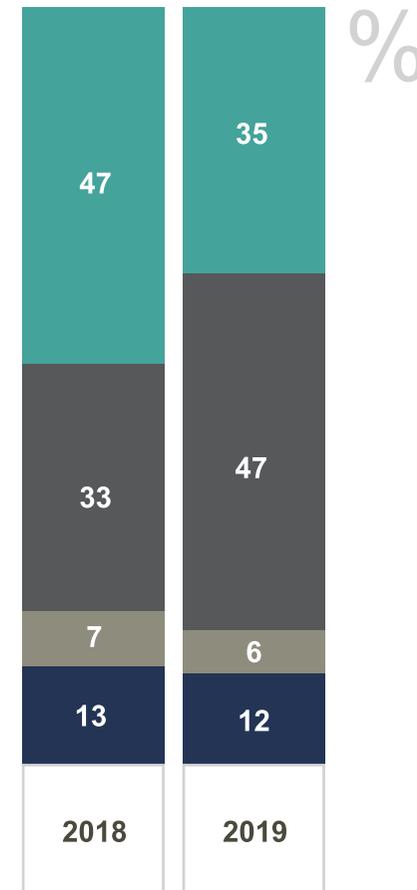


## Financial expectations of Australian exhibition companies compared to previous years

### Turnover



### Operating Profit

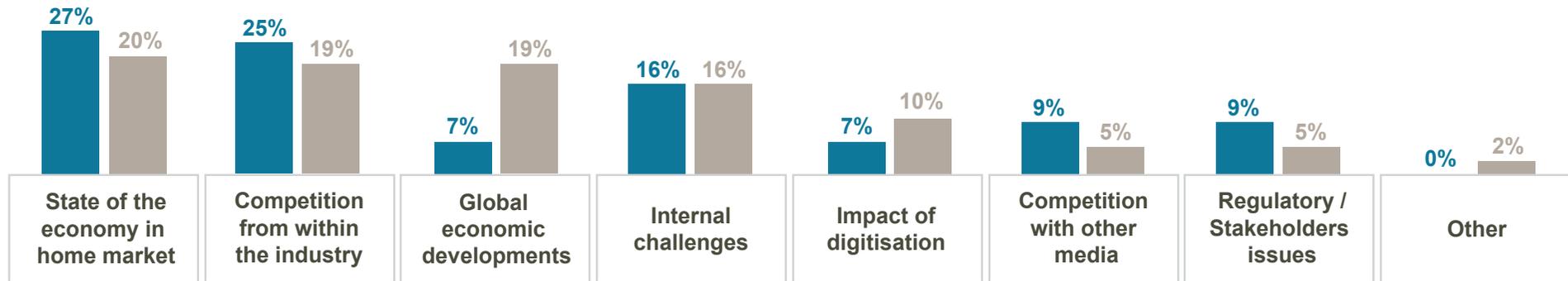


# Detailed results for Australia



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

Australia Global

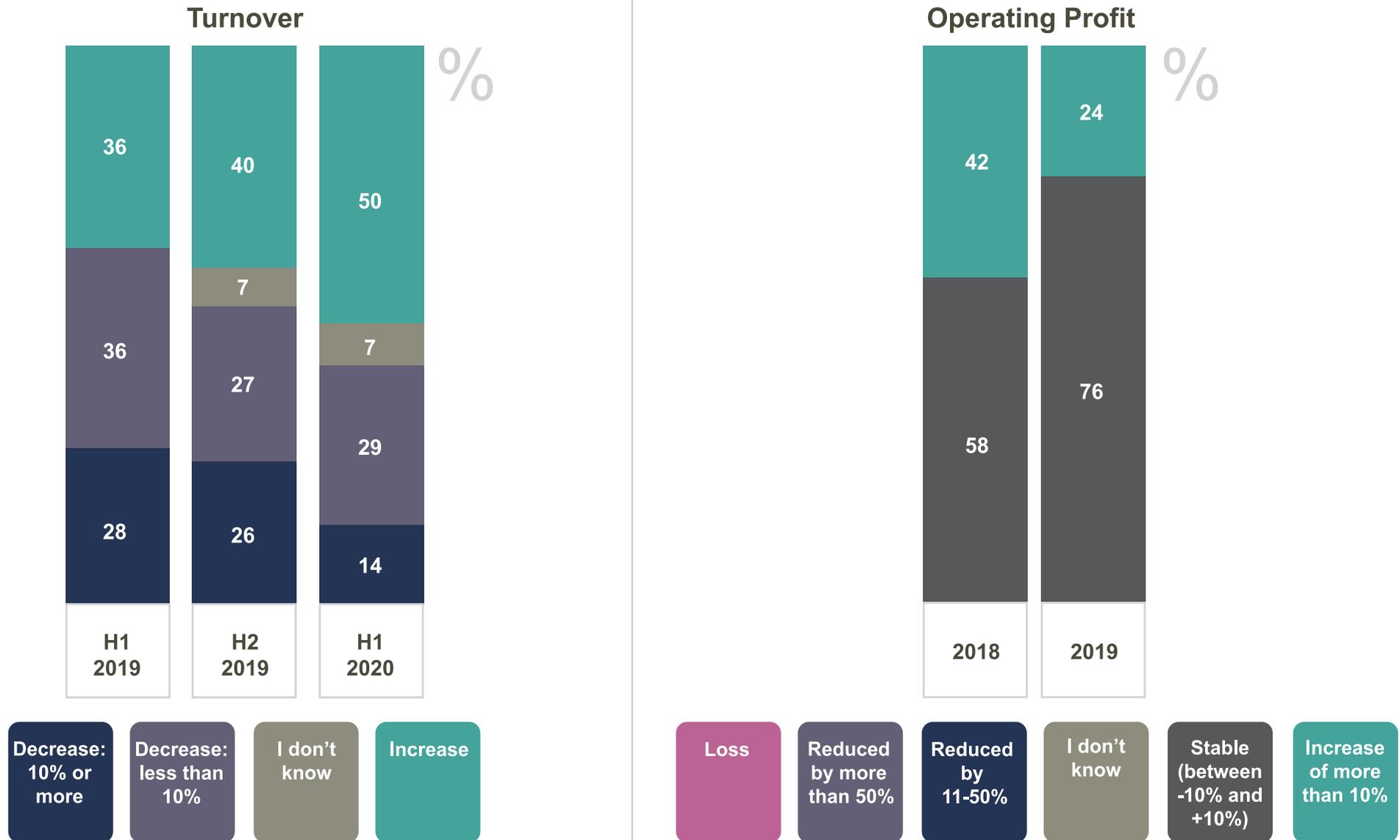


## Digitisation: implementation in the Australia and globally





## Financial expectations of Chinese exhibition companies compared to previous years

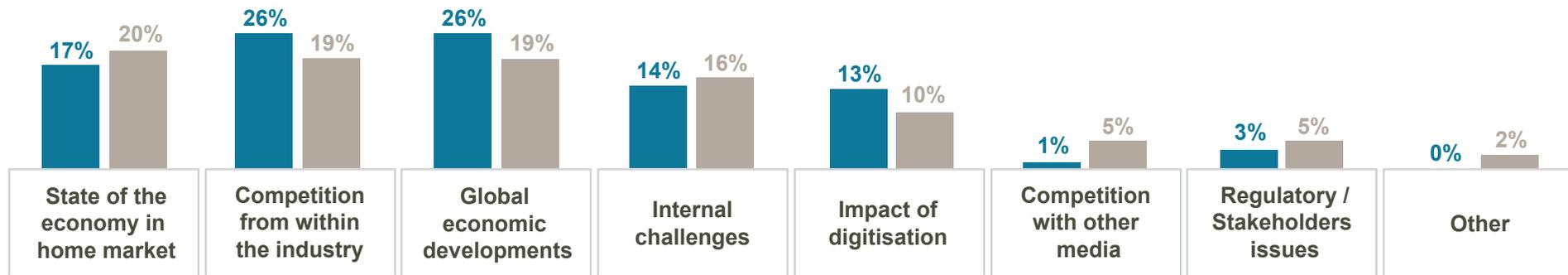




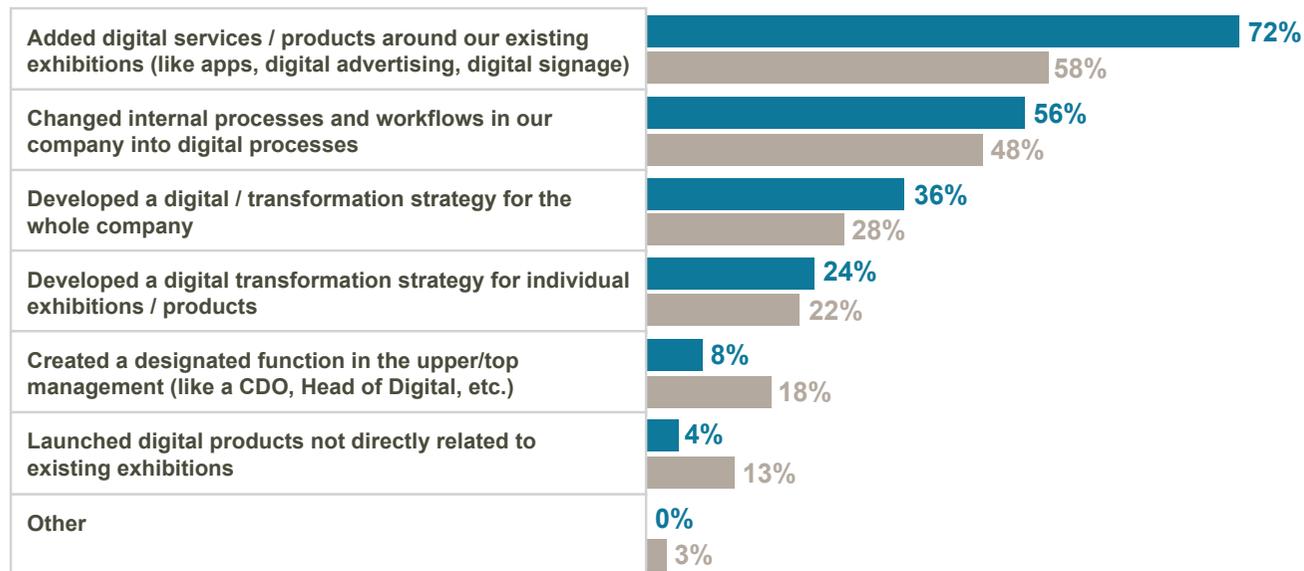
## Most important business issues in the exhibition industry in China and globally

China

Global

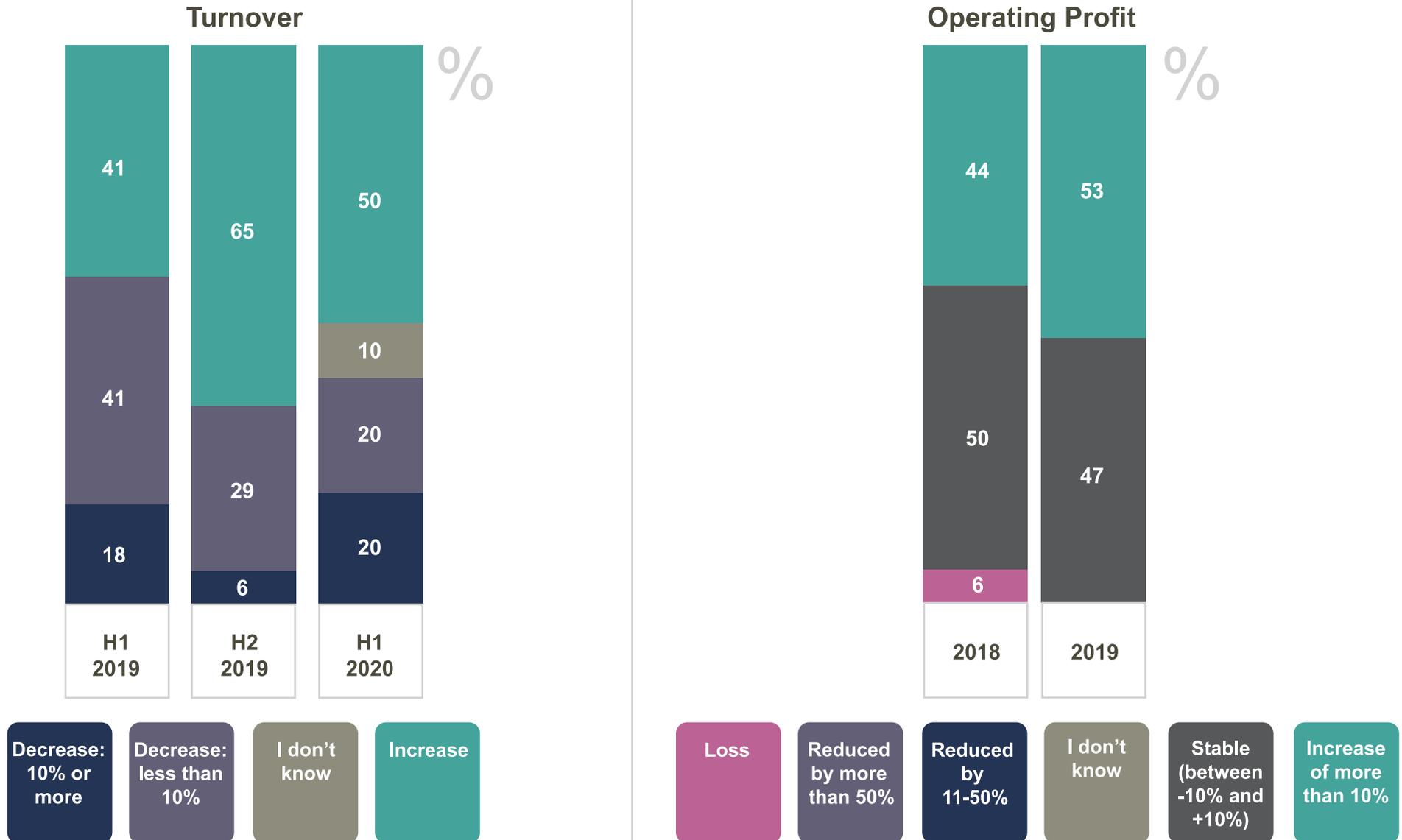


## Digitisation: implementation in China and globally





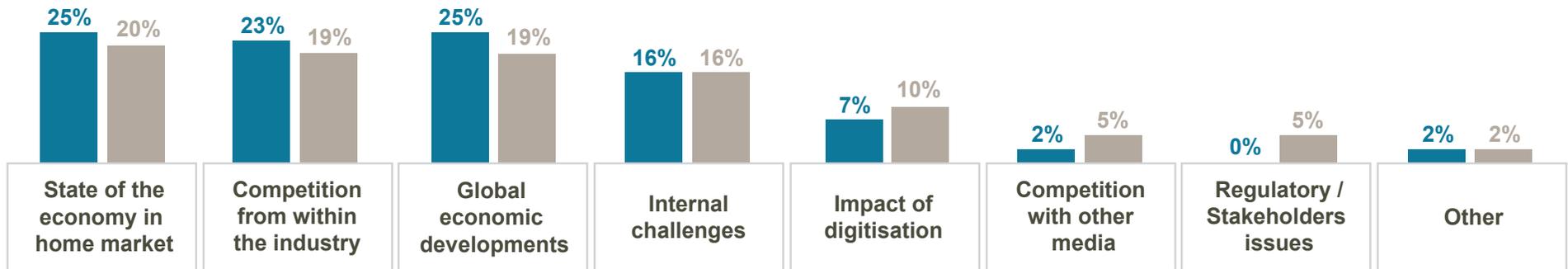
## Financial expectations of Indian exhibition companies compared to previous years



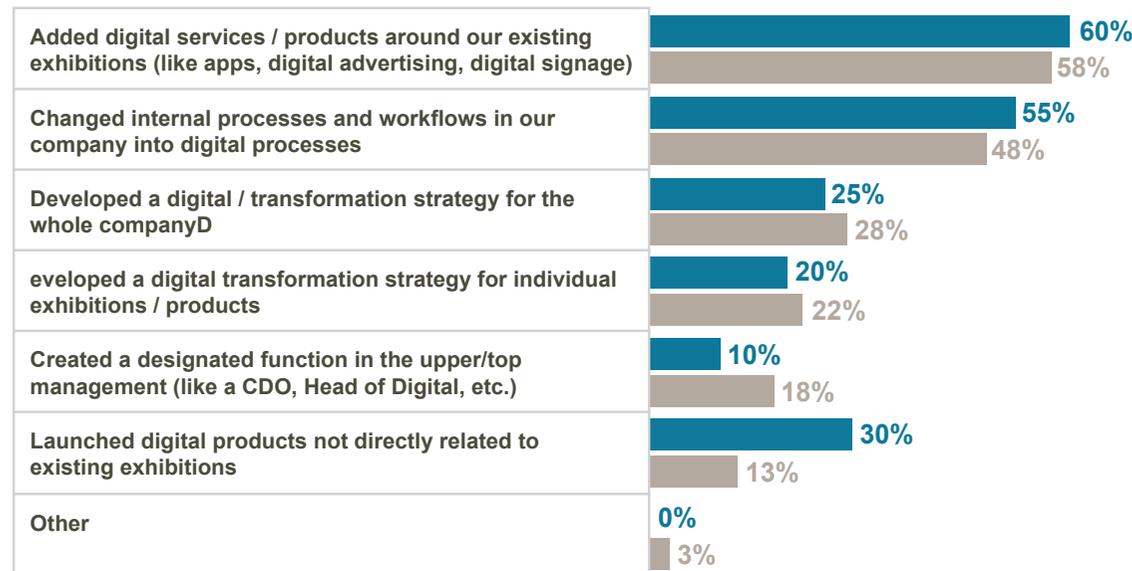


## Most important business issues in the exhibition industry in India and globally

India Global

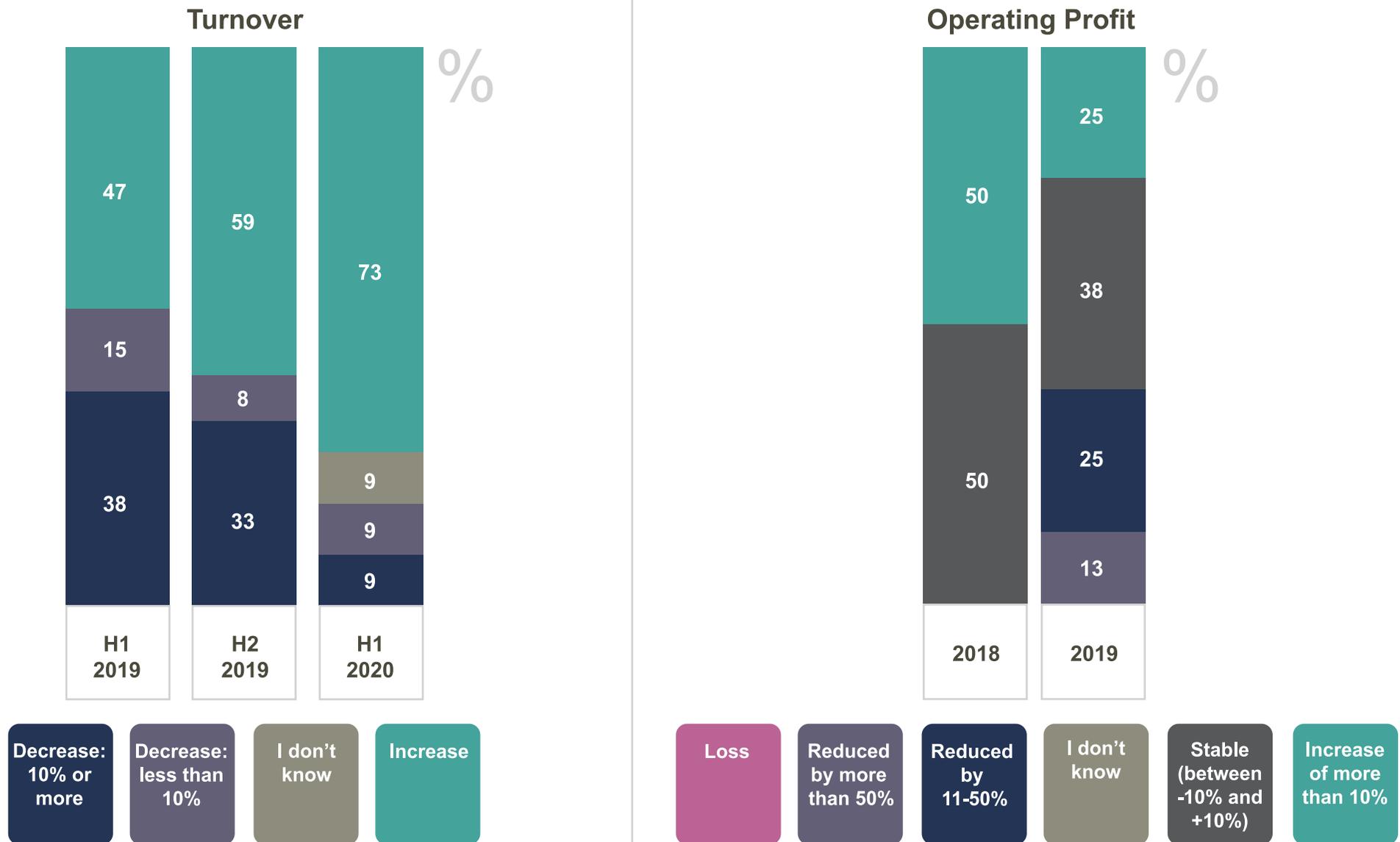


## Digitisation: implementation in India and globally





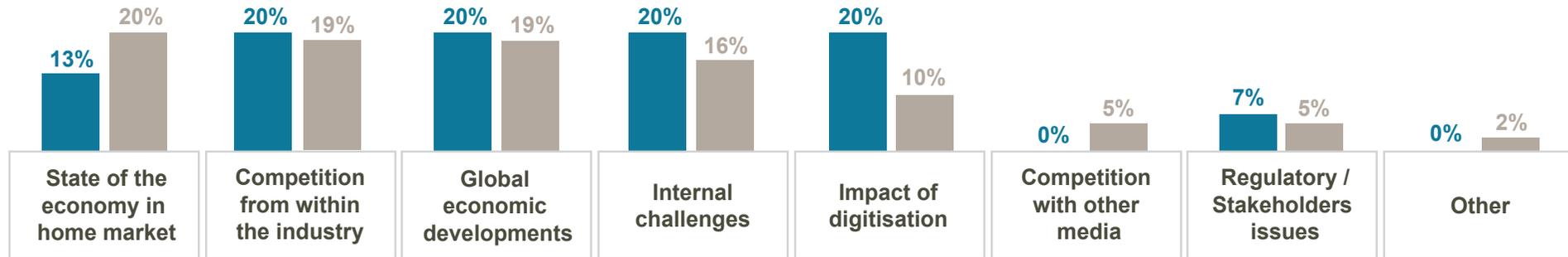
## Financial expectations of Indonesian exhibition companies compared to previous years





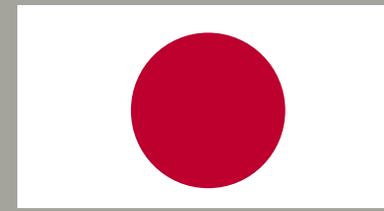
## Most important business issues in the exhibition industry in Indonesia and globally

**Indonesia** Global

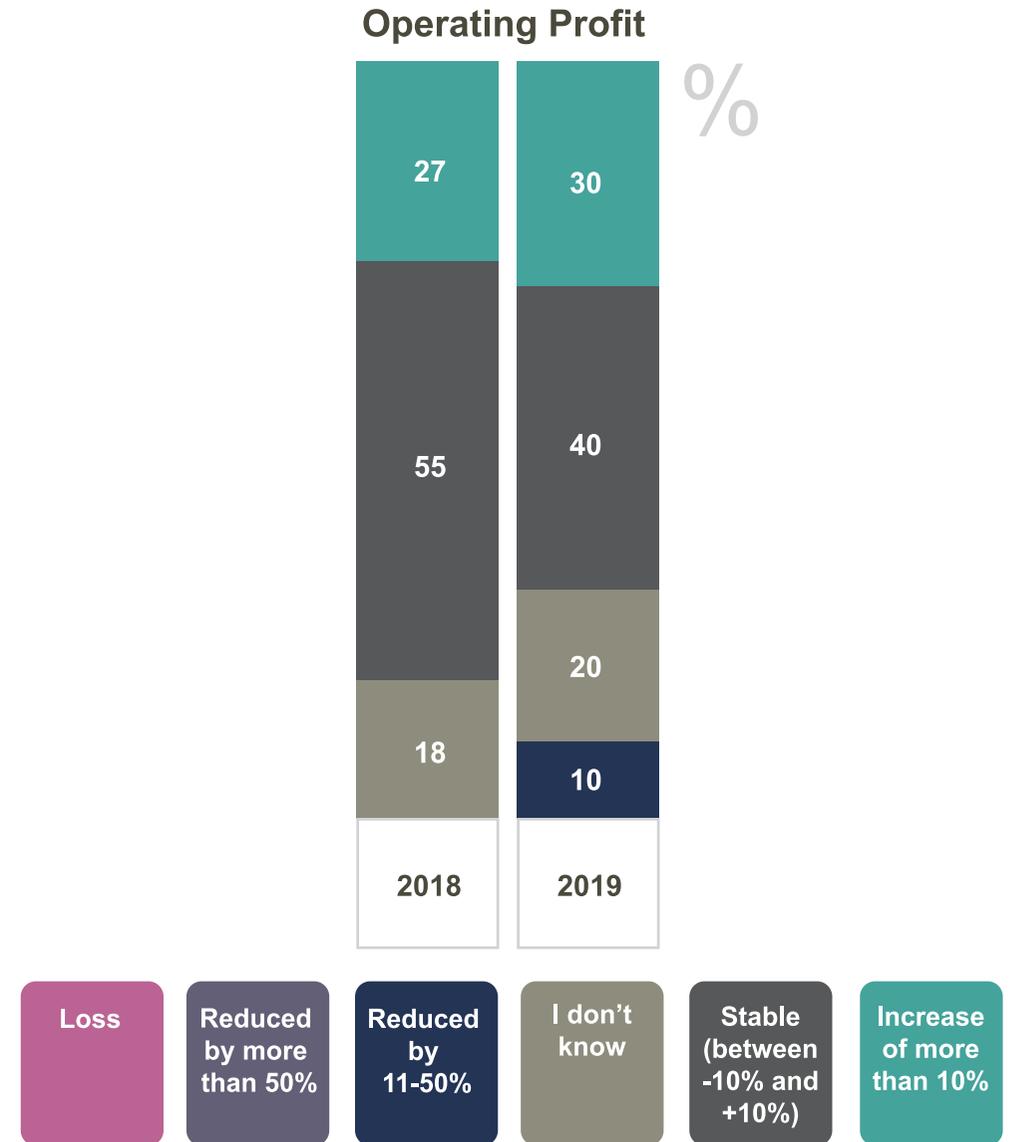
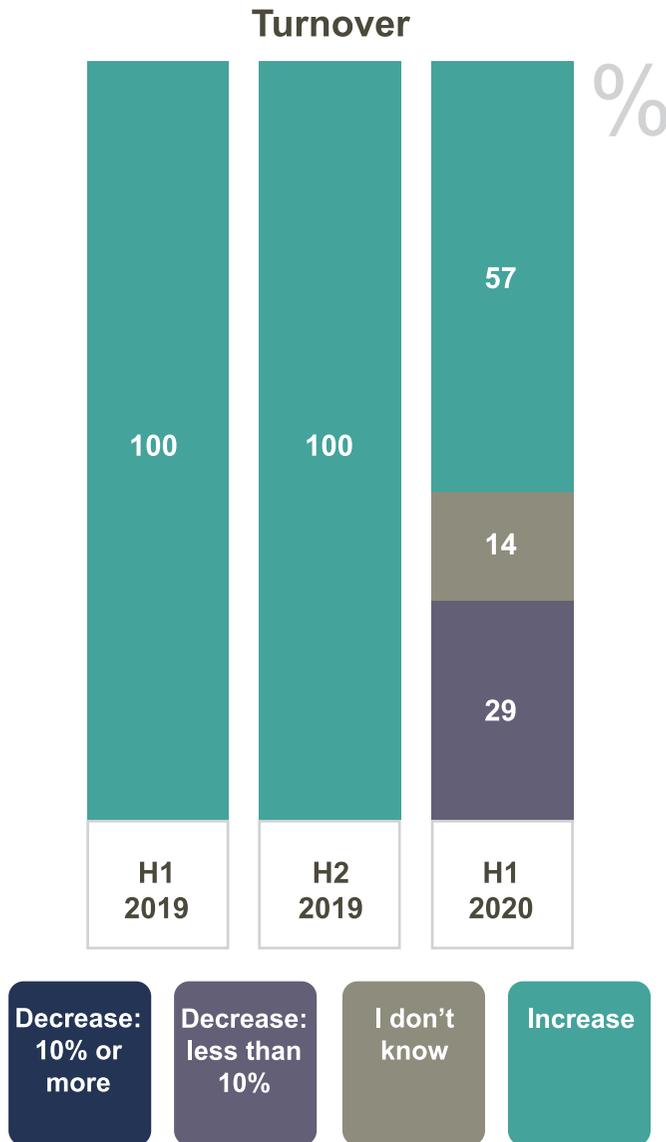


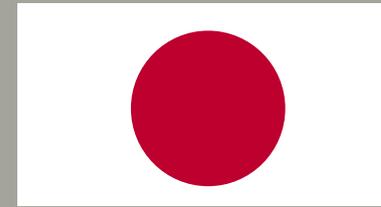
## Digitisation: implementation in Indonesia and globally





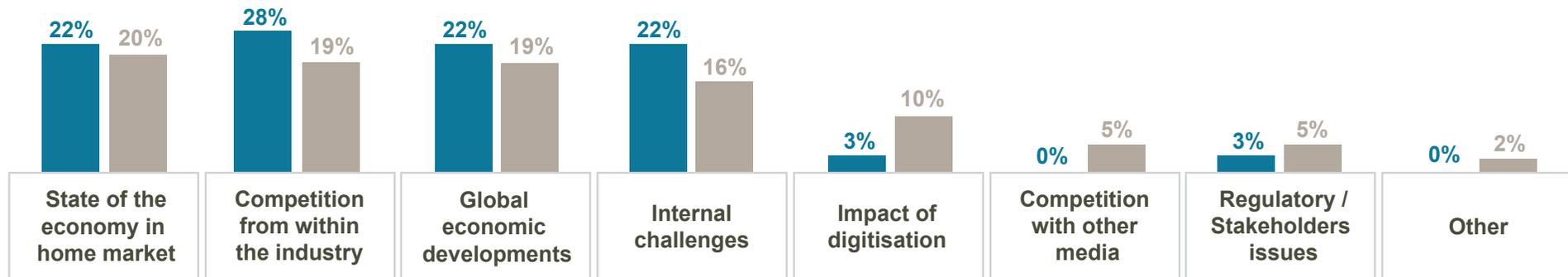
## Financial expectations of Japanese exhibition companies compared to previous years



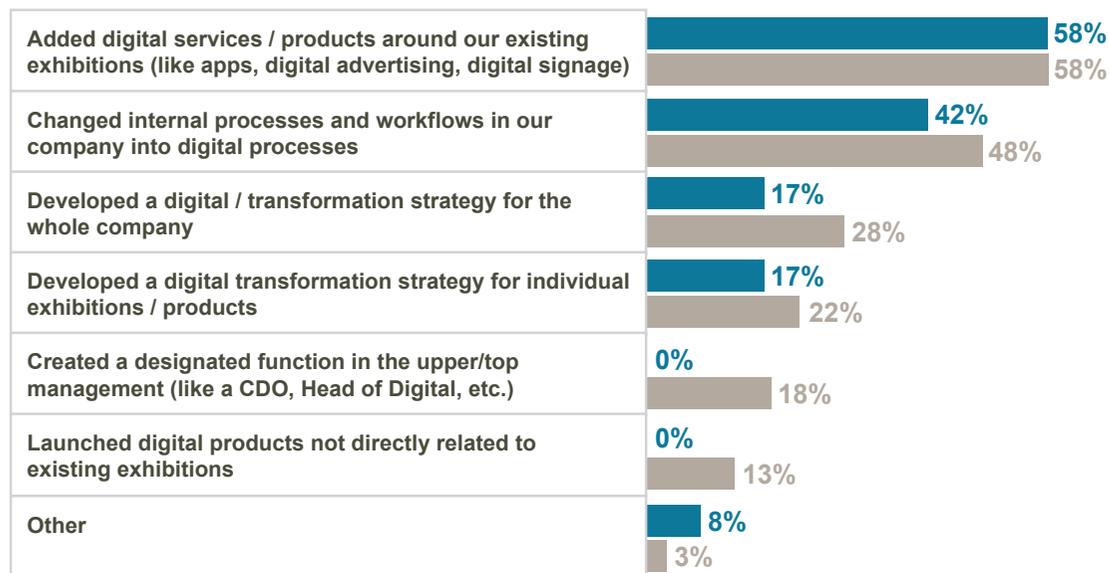


## Most important business issues in the exhibition industry in Japan and globally

Japan Global

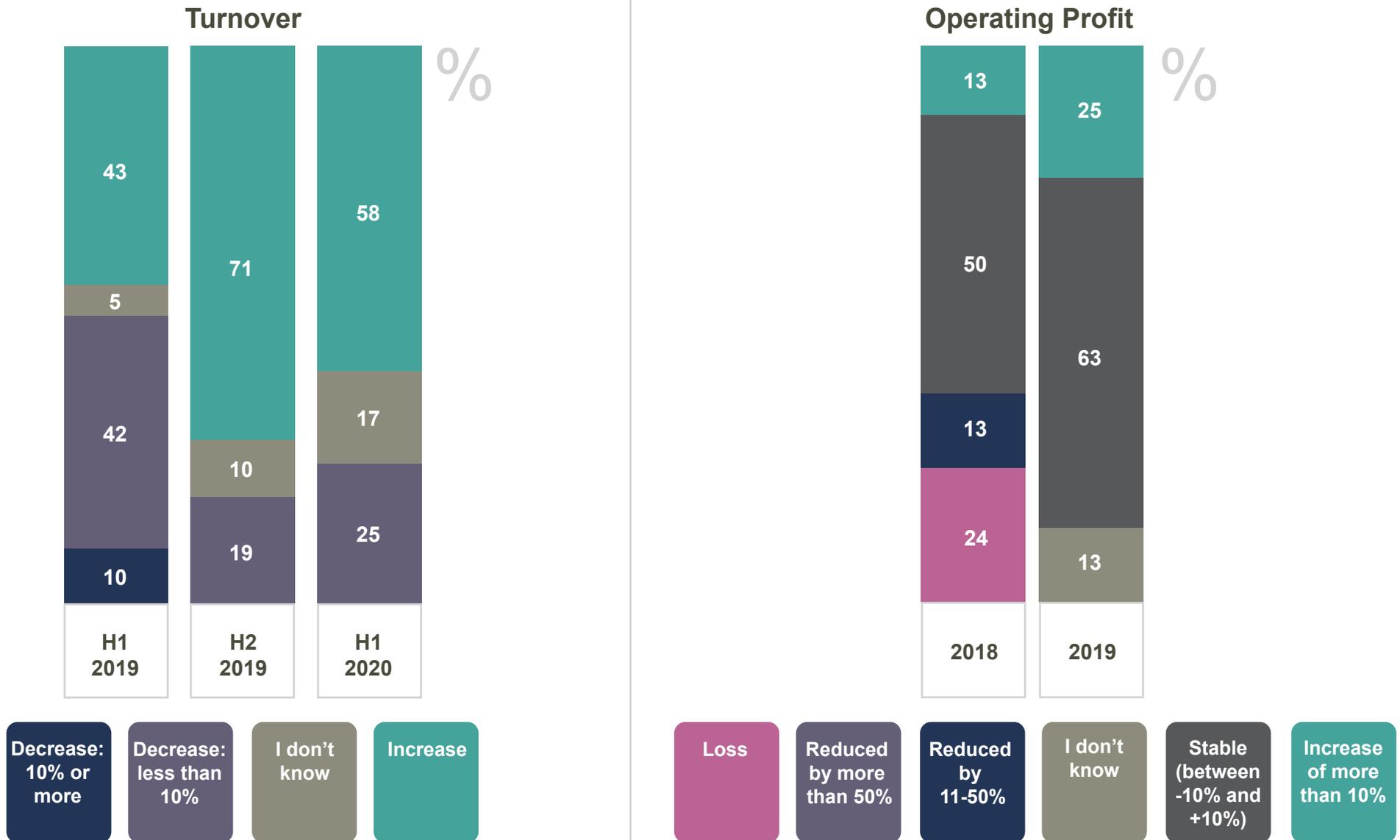


## Digitisation: implementation in Japan and globally





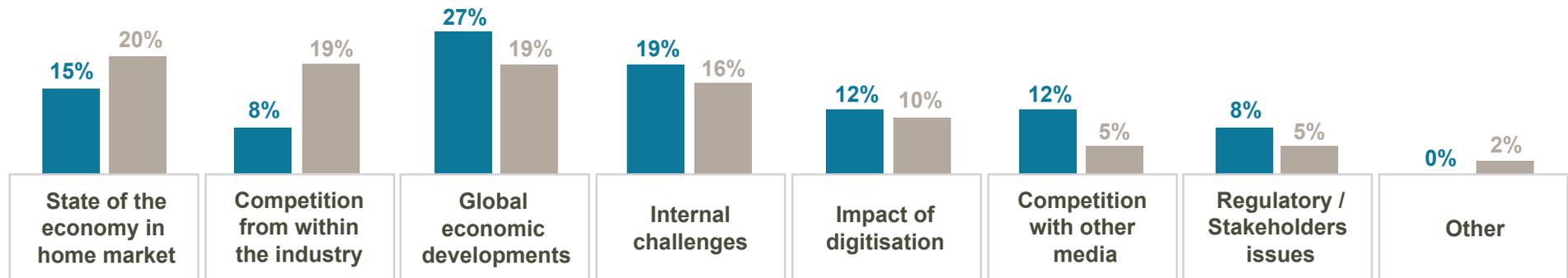
## Financial expectations of exhibition companies in Macau compared to previous years



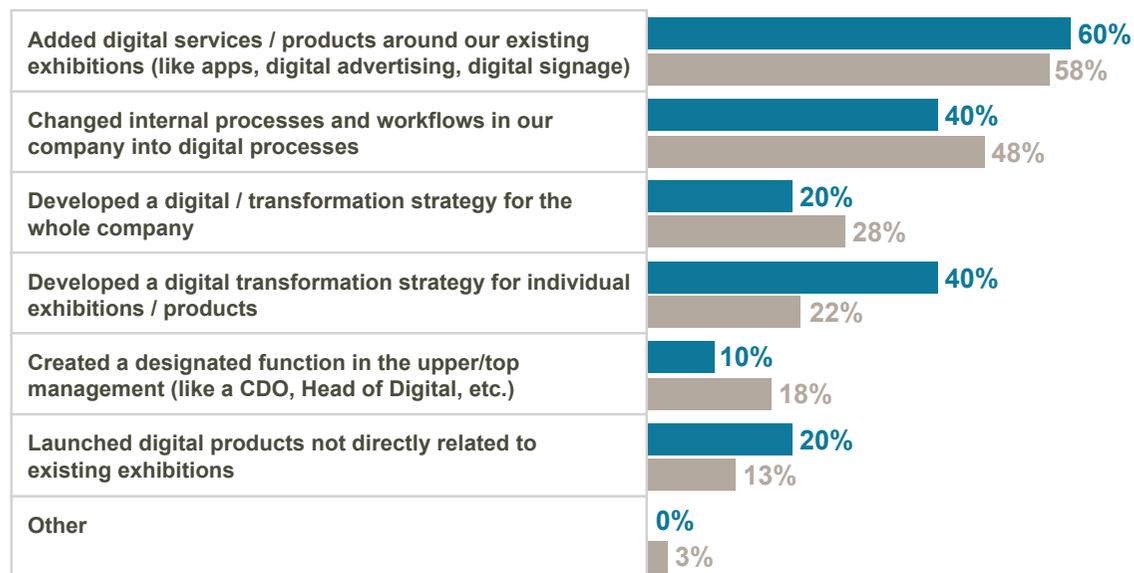


## Most important business issues in the exhibition industry in Macau and globally

Macau Global

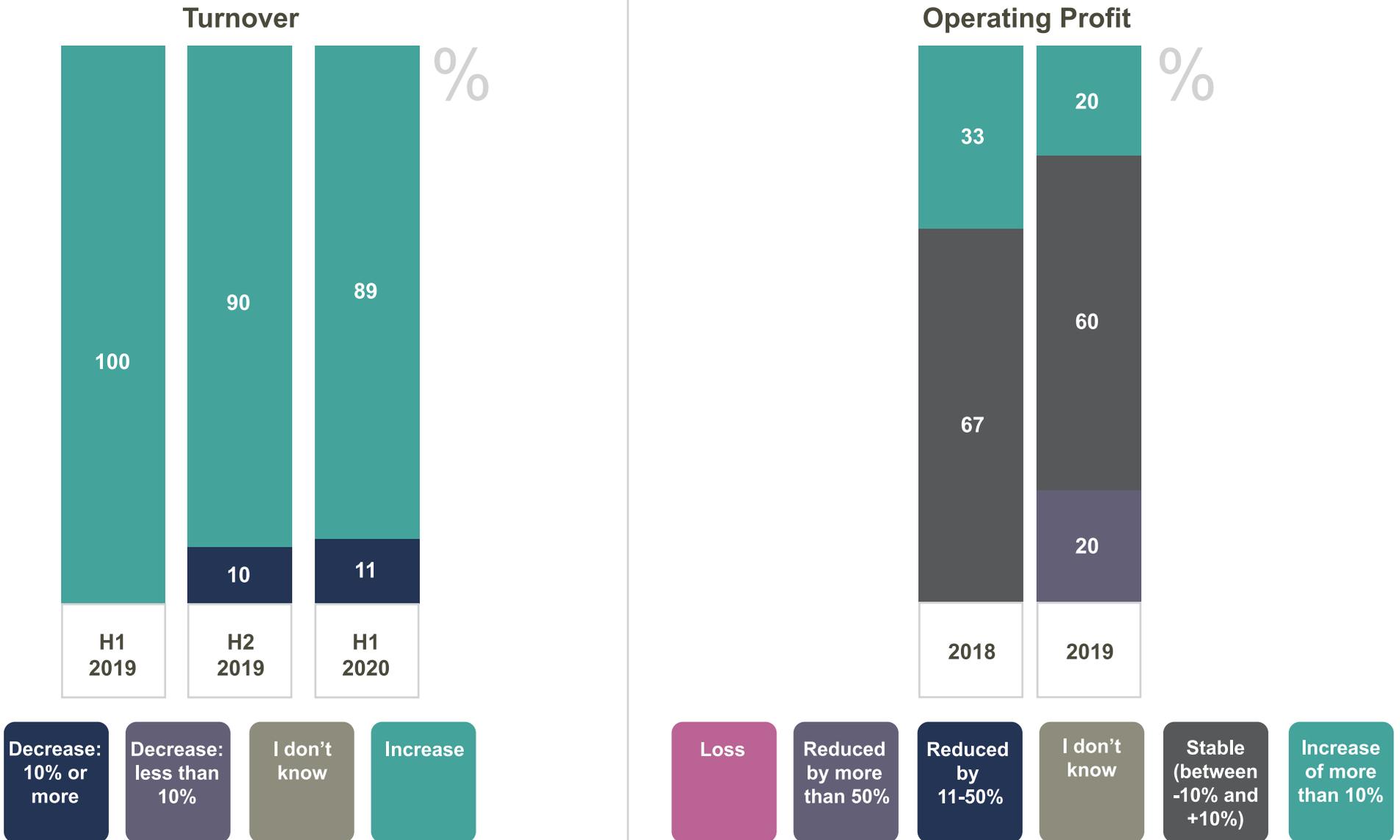


## Digitisation: implementation in Macau and globally





## Financial expectations of Thai exhibition companies compared to previous years

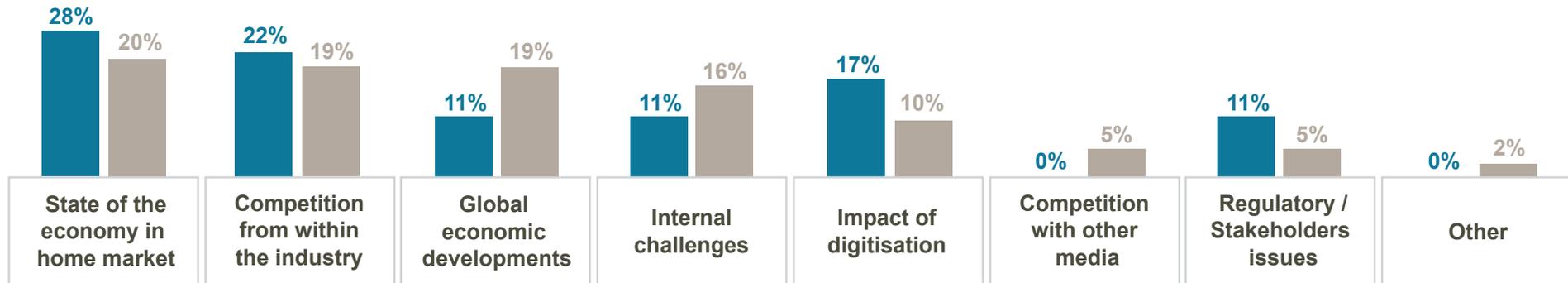


# Detailed results for Thailand

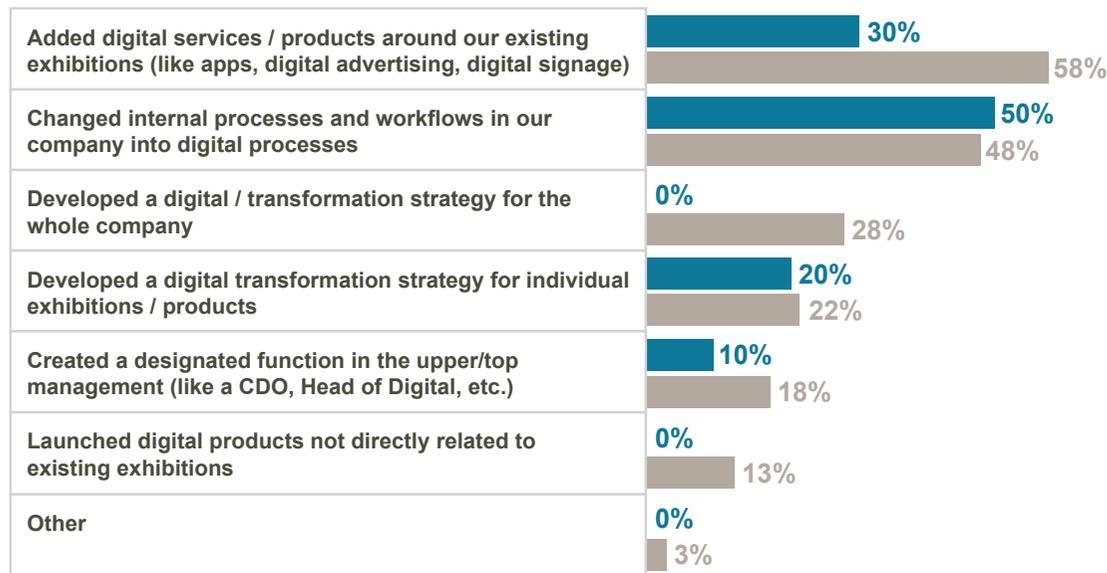


## Most important business issues in the exhibition industry in Thailand and globally

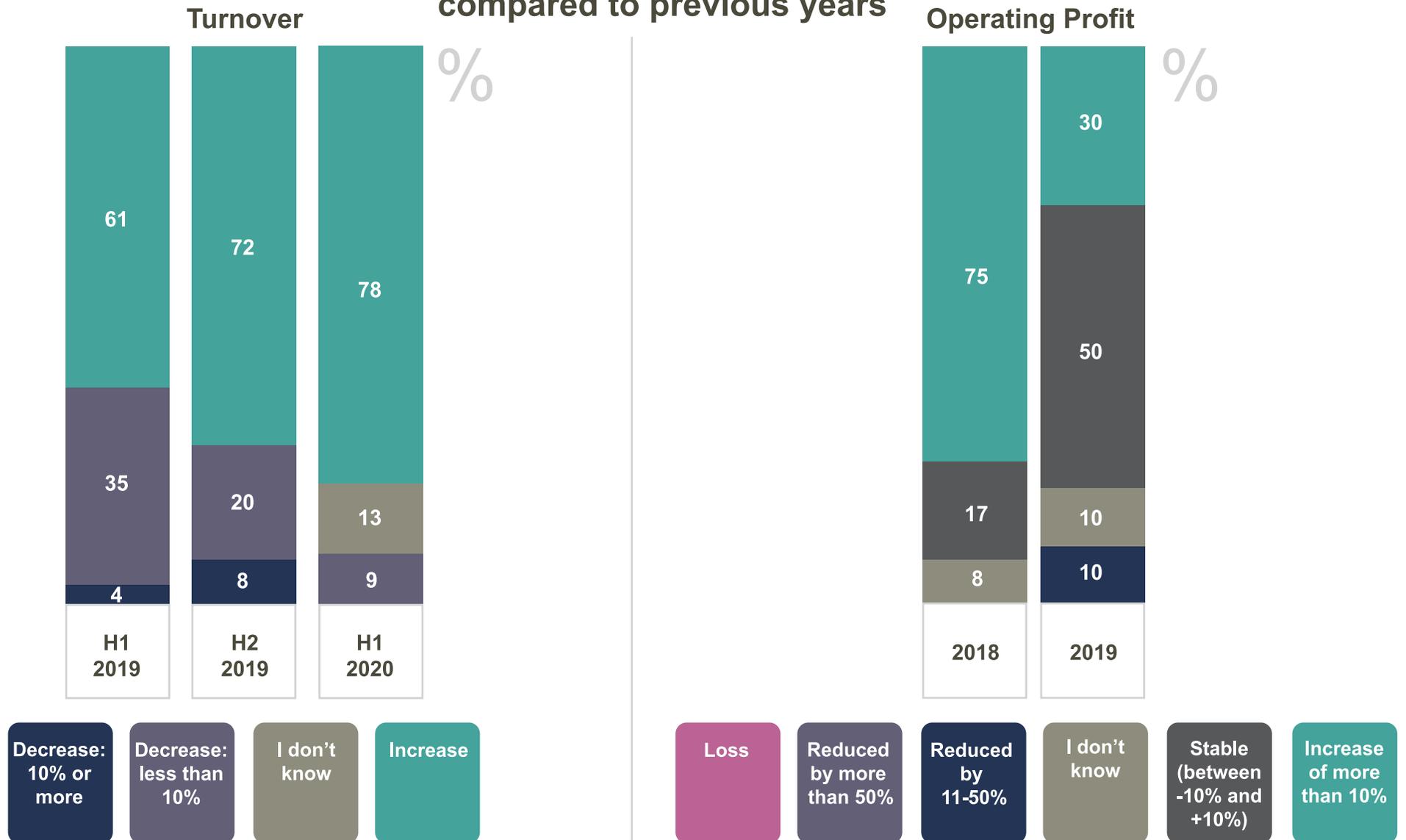
Thailand
Global



## Digitisation: implementation in Thailand and globally



## Financial expectations of exhibition companies from other countries in Asia – Pacific compared to previous years

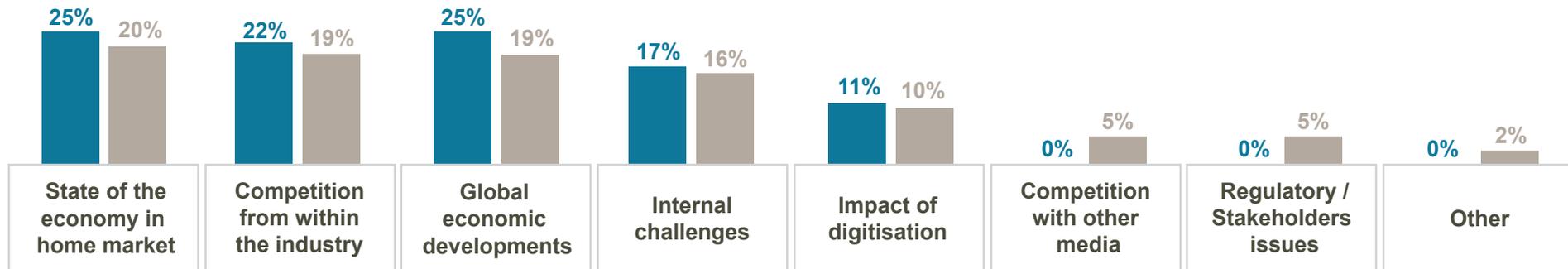


# Detailed results for other countries in Asia – Pacific

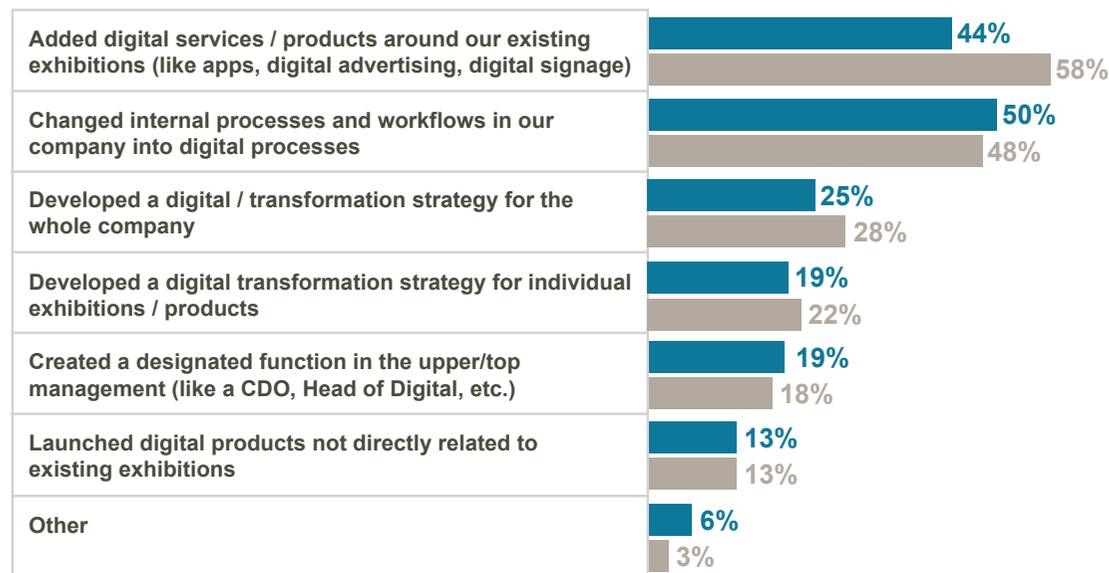
## Most important business issues in the exhibition industry for other countries in Asia – Pacific and globally

Other Countries in Asia - Pacific

Global



## Digitisation: implementation in other countries in Asia - Pacific and globally



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. This 23rd survey, concluded in July 2019, was answered by 322 companies from 57 countries. The results are detailed for 20 geographical zones, including 16 major countries and regions markets.

Survey results reveal a generally positive outlook in terms of financial expectations with, however, elements of slowdown noticed for the turnover during the first half of 2019 and also in terms of profit in 2019, when compared to 2018, reflecting the slowdown of global economic growth. More specifically:

- While a majority of companies in all regions – except Middle East / Africa - expect **Gross Turnover increases** for the two halves of 2019 and the first half of 2020, the first half of 2019 appears to be weaker compared with recent years. Having said that, current forecasts for the second half of 2019 and the first half of 2020 show a return to robust levels. Eight of the surveyed countries and regions have, for all three periods surveyed, a majority of companies declaring turnover increases: Australia, Brazil, Italy, Japan, South Africa, Thailand, UK and USA. For the second half of 2019 and the first half of 2020, this situation also applies to India, Indonesia, Germany, Macau and Russia.
- In terms of **operating profit**, 80% of companies maintained a good level of performance in 2018 and around 40 to 50% of them declared an increase of more than 10% compared to 2017. The highest proportions of companies declaring such an increase in 2018 are observed in Brazil, Germany, Italy, Mexico, the UK and the USA. For 2019, only Europe has, on average, an even higher proportion of companies expecting an increase of more than 10% of their operating profit. In all other regions, the share of companies projecting this decreases from 2018 to 2019. The highest proportions of companies declaring such an

increase in 2018 are observed in Russia (71%), UK (55%), India (53%) and the USA (45%).

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” (24% in the current survey, down 1% compared to 6 months ago), “Competition from within the industry” (19%, unchanged), “Global economic developments” (19%, down 1%), “Internal challenges” (16%, up 1%).

Finally, the Global Barometer results show that the majority of companies respond to the accelerating process of **digitisation** in the exhibition industry. The “digitisation Implementation Index” towards a “full digitisation” is 27 globally. China, Germany, India, Indonesia, Italy, Mexico, the UK and USA are identified as the exhibition markets who are currently most advanced in the digital transformation process.

**THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!**

**THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2020 – PLEASE PARTICIPATE!**

# Appendix: Number of survey replies per country

## Total = 322 (in 57 countries/regions)

<b>North America</b>	<b>27</b>	<b>Europe</b>	<b>92</b>	<b>Middle East</b>	<b>13</b>
Canada	2	Belgium	1	Iran	4
Mexico	12	Croatia	1	Jordan	1
USA	13	Czech Republic	1	Lebanon	1
		France	3	Qatar	1
		Georgia	1	Saudi Arabia	2
<b>Central &amp; South America</b>	<b>50</b>	Germany	16	UAE	4
Argentina	15	Greece	4		
Bolivia	2	Hungary	1	<b>Asia / Pacific</b>	<b>123</b>
Brazil	14	Italy	11	Australia	20
Chile	3	Moldavia	1	China	25
Colombia	8	Netherlands	1	India	20
Cuba	1	Poland	2	Indonesia	10
Honduras	1	Romania	1	Japan	12
Panama	1	Russian	24	Macau	10
Peru	3	federation	1	Malaysia	2
Uruguay	1	Slovenia	4	New Zealand	1
Venezuela	1	Spain	3	Pakistan	2
		Sweden	4	Philippines	1
<b>Africa</b>	<b>17</b>	Turkey	1	Singapore	4
South Africa	17	Ukraine	11	South Korea	4
		United Kingdom		Thailand	10
				Vietnam	2

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