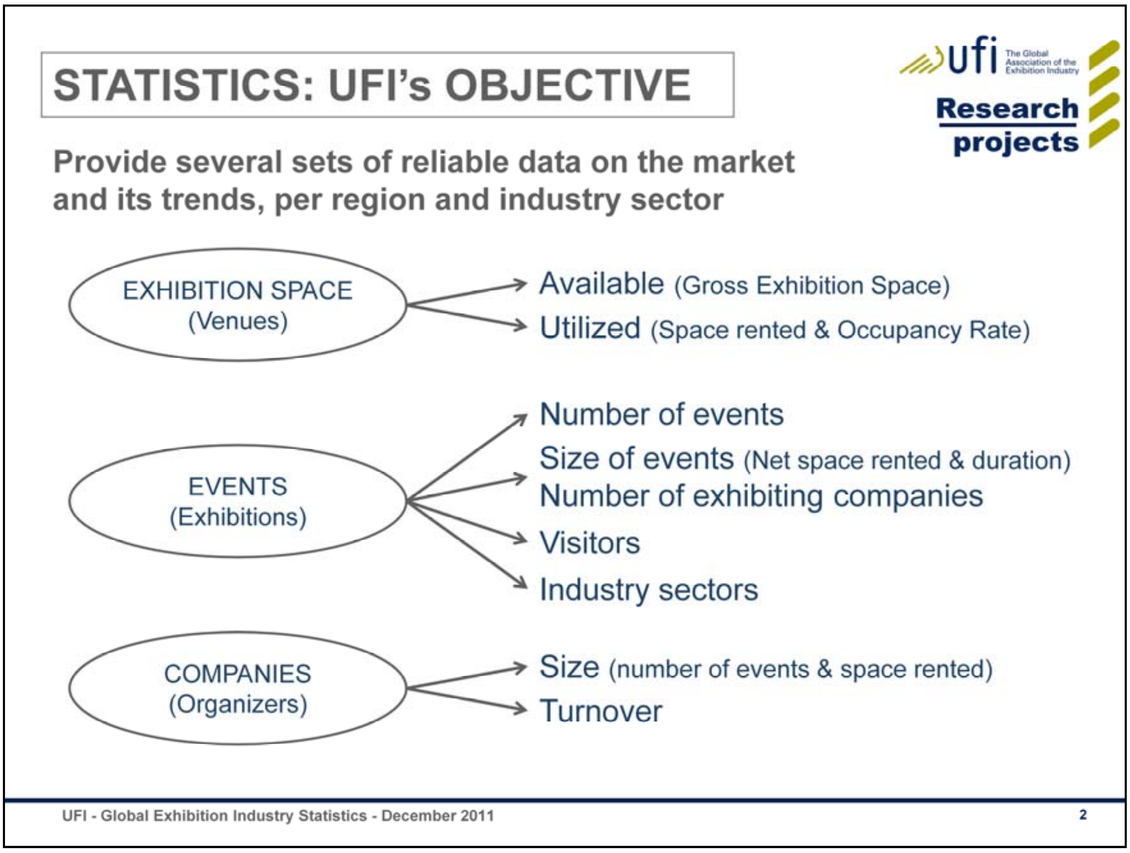
Research projects

Global Exhibition Industry Statistics

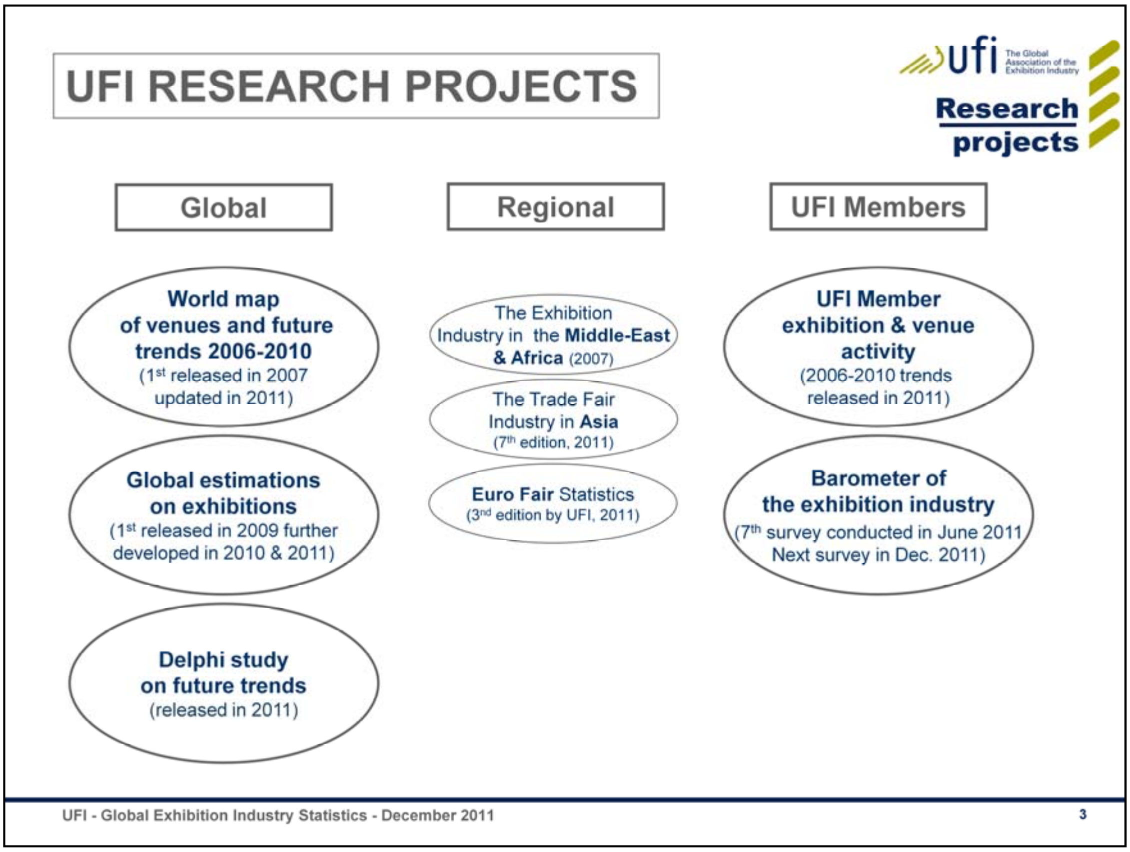


UFI's objective is to provide reliable data on the exhibition market to its members and to all those interested in exhibitions.

This data covers 3 elements;

- exhibition venues
- the exhibitions held in those venues
- the companies who organize those events.

For each of these elements, UFI has defined the key indicators we aim to provide on a regular basis.

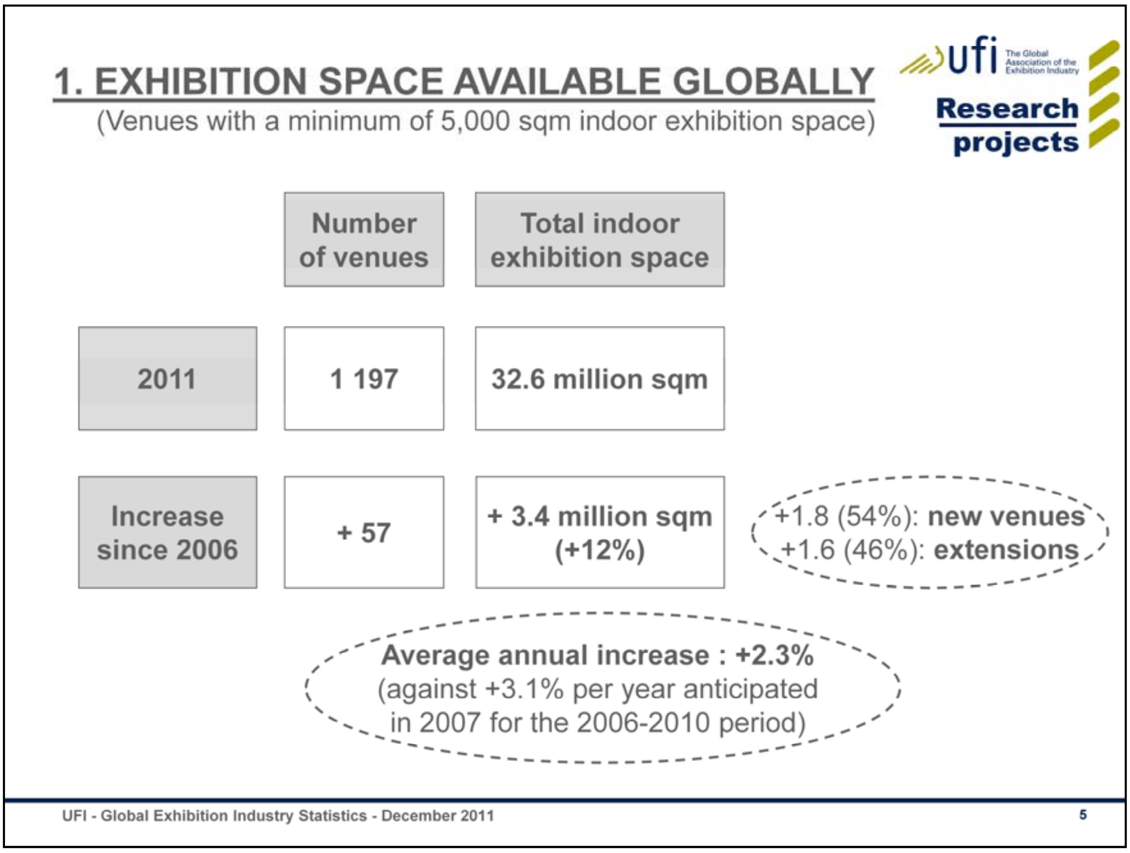


A variety of research projects are underway to develop the required data. Some of these are global, others are regional.

We also consider that the UFI membership data is itself worth analyzing. It is large and there is no other existing international sample of companies at both venue and organizer levels.

The current results in the 3 areas previously mentioned are listed on this slide.

Highlighted in blue on this slide are the elements which are released in this document.

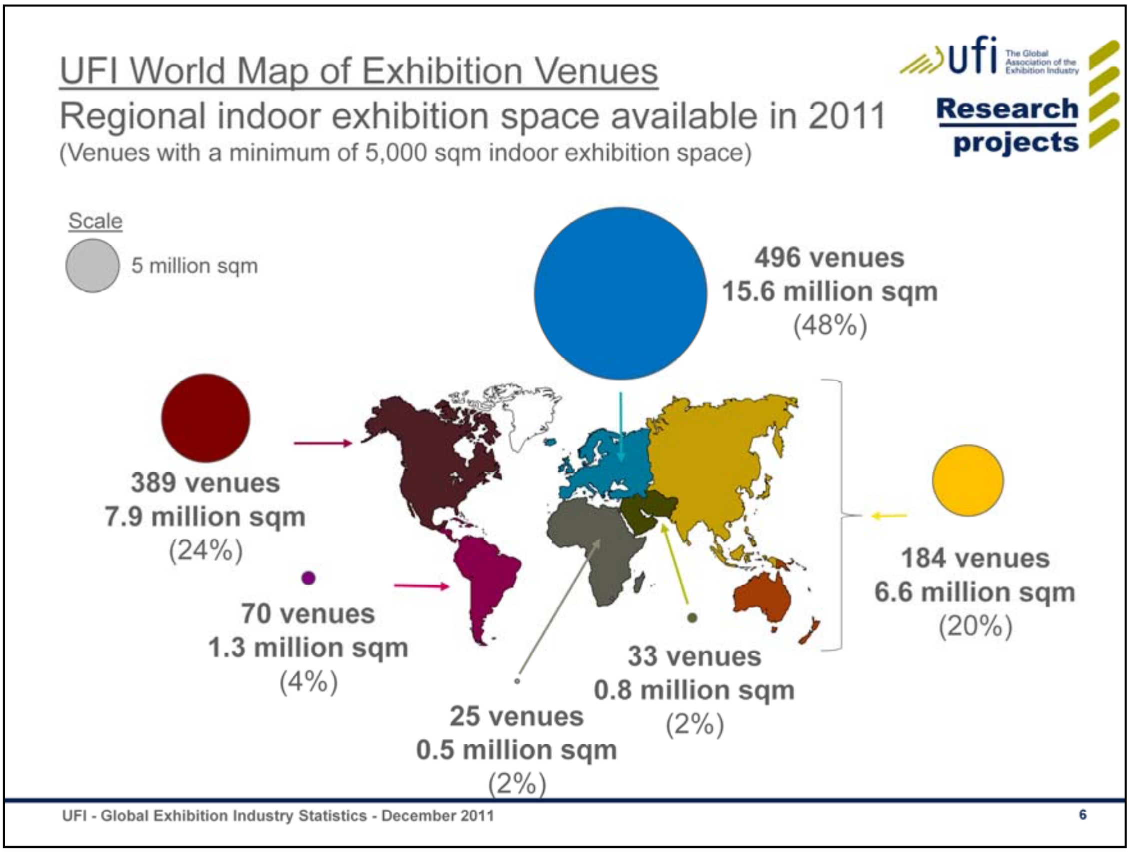


So first, the capacity side of our industry.

We have identified 1 197 exhibition venues with a minimum of 5000 sqm. They cumulate 32.6 million sqm of indoor exhibition space.

That is 57 more since 2006 with a growth of 3.4 million sqm (54% of the increase is related to new venues and 46% to extensions of existing venues. Closures of venues are marginal).

The average annual increase is 2.3%, which is lower than the 3.1% per year that had been anticipated in 2007 for the 2006-2010 period.



Europe and North America, followed by Asia offer the highest venues capacities, with respectively 48%, 24% and 20% of the total indoor exhibition space.

UFI World Map of Exhibition Venues

National indoor exhibition space available in 2011

(Venues with a minimum of 5,000 sqm indoor exhibition space)

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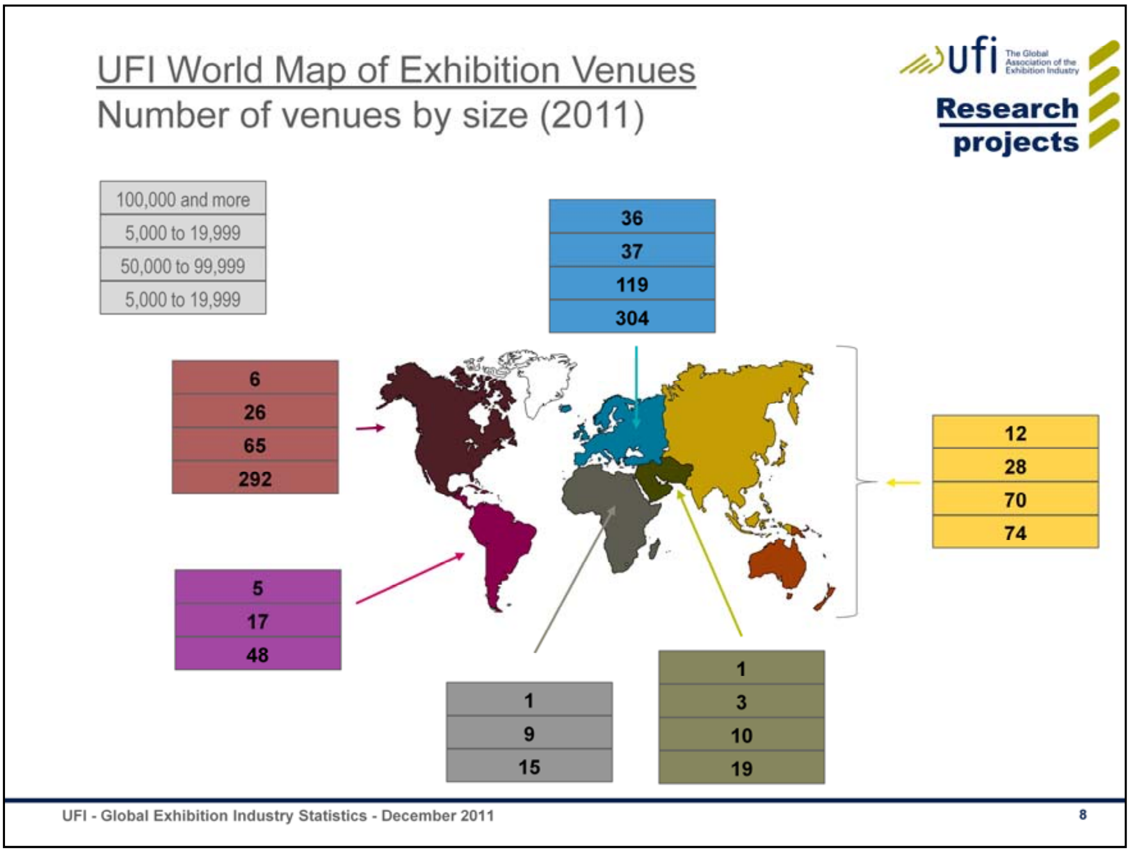
15 countries account for 80% of the global indoor exhibition space

	TOTAL (in sqm)	**WORLD %**
USA	6 712 342	21%
China	4 755 102	15%
Germany	3 377 821	10%
Italy	2 227 304	7%
France	2 094 554	6%
Spain	1 548 057	5%
The Netherlands	960 530	3%
Brazil	701 882	2%
United Kingdom	701 857	2%
Canada	684 175	2%
Russia	566 777	2%
Switzerland	500 570	2%
Belgium	448 265	1%
Turkey	433 904	1%
Mexico	431 761	1%



The size of venues also varies from one region to another.

55 venues – 36 of them being in Europe and 12 in Asia – have an indoor exhibition space of 100,000 sqm and more.

UFI World Map of Exhibition Venues
Venues with a minimum of 200,000 sqm of indoor exhibition in 2011

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1.	Messe Hannover	Hanover (Germany)	466 100
2.	Messe Frankfurt	Frankfurt/Main (Germany)	345 697
3.	Fiera Milano (Rho Pero)	Milano (Italy)	345 000
4.	Pazhou Complex	Guangzhou (China)	338 000
5.	Koelnmesse	Cologne (Germany)	284 000
6.	Messe Duesseldorf	Duesseldorf (Germany)	262 704
7.	Paris Nord Villepinte	Paris (France)	241 582
8.	McCormick Place	Chicago (USA)	241 524
9.	Feria Valencia	Valencia (Spain)	230 602
10.	Porte de Versailles	Paris (France)	228 211
11.	Crocus International	Moscow (Russia)	226 399
12.	Fira de Barcelona: Gran Via venue	Barcelona (Spain)	205 000
13.	BolognaFiere	Bologna (Italy)	200 000
14.	Feria de Madrid / IFEMA	Madrid (Spain)	200 000
15.	Shanghai New International Expo Centre	Shanghai (China)	200 000

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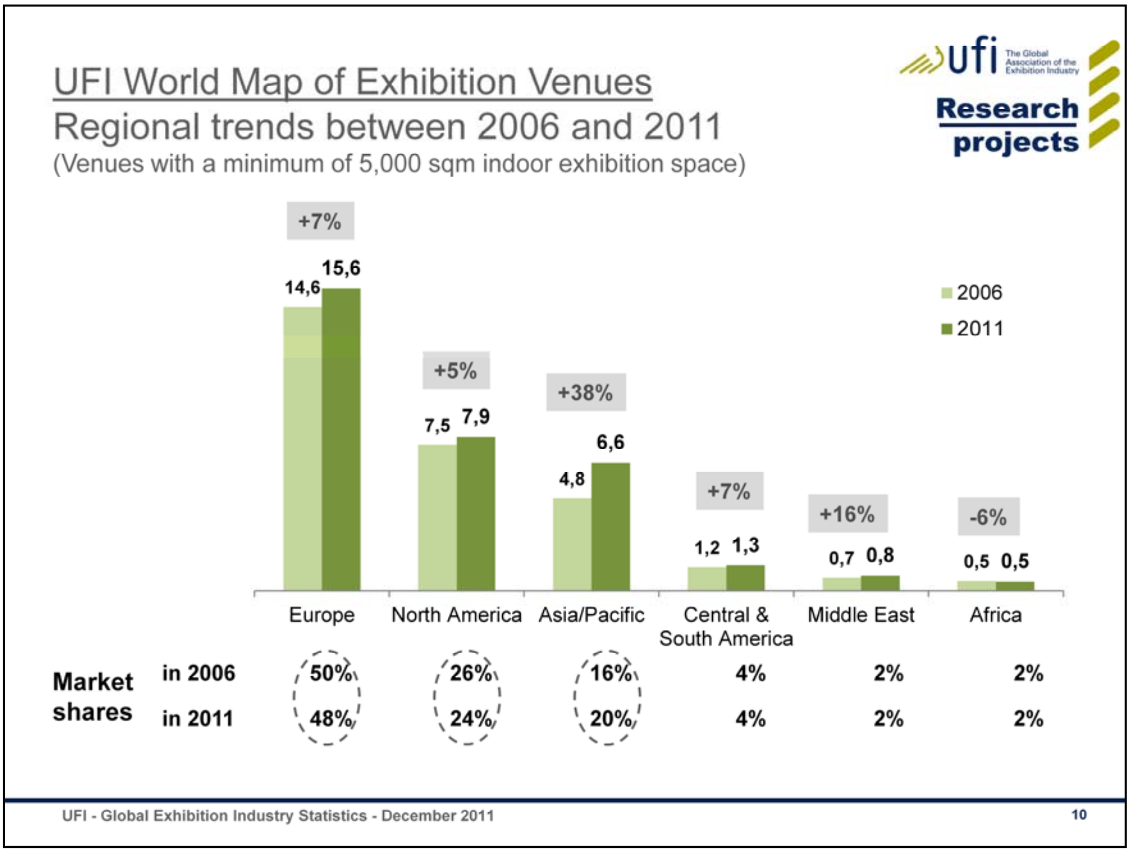
15 venues have an indoor exhibition space of 200,000 sqm and more.



The breakdown of indoor exhibition space by region for both 2006 and 2011 is shown on this chart.

All regions, except Africa, have significantly increased their capacity (in Africa, 1 large venue has closed). This is particularly true for Asia/Pacific (+38%) and the Middle East (+16%).

One significant change is the shift of 2% of the global “market share” from both Europe and North America to Asia / Pacific (+4%).

UFI World Map of Exhibition Venues

Additional indoor exhibition space between 2006 and 2011 (Venues with a minimum of 5,000 sqm indoor exhibition space)

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The 15 countries with the largest capacities account for 80% of the total increase of indoor exhibition space between 2006 and 2011

	2011 (in sqm)	**Increase since 2006**
USA	6 712 342	+ 5%
China	4 755 102	+ 48%
Germany	3 377 821	+ 2%
Italy	2 227 304	+ 3%
France	2 094 554	+ 3%
Spain	1 548 057	+ 13%
The Netherlands	960 530	+ 15%
Brazil	701 882	+ 6%
United Kingdom	701 857	+ 13%
Canada	684 175	+ 6%
Russia	566 777	+ 17%
Switzerland	500 570	+ 1%
Belgium	448 265	+ 1%
Turkey	433 904	+ 25%
Mexico	431 761	+ 15%

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In terms of countries, 5 of them (USA, China, Germany, Italy and France) account for 59% of the total world indoor exhibition space.

34 countries have a minimum of 100,000 sqm of indoor exhibition space.

UFI World Map of Exhibition Venues

Additional indoor exhibition space between 2006 and 2011 (Venues with a minimum of 5,000 sqm indoor exhibition space)

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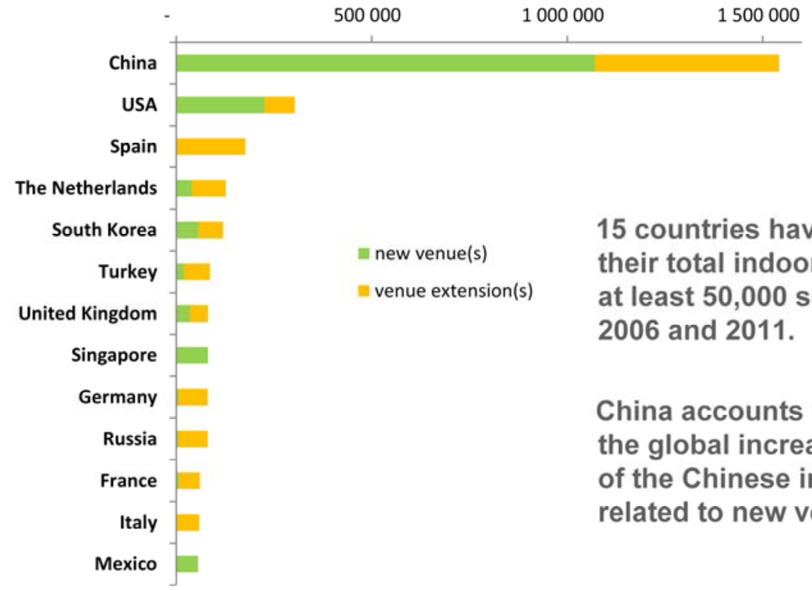
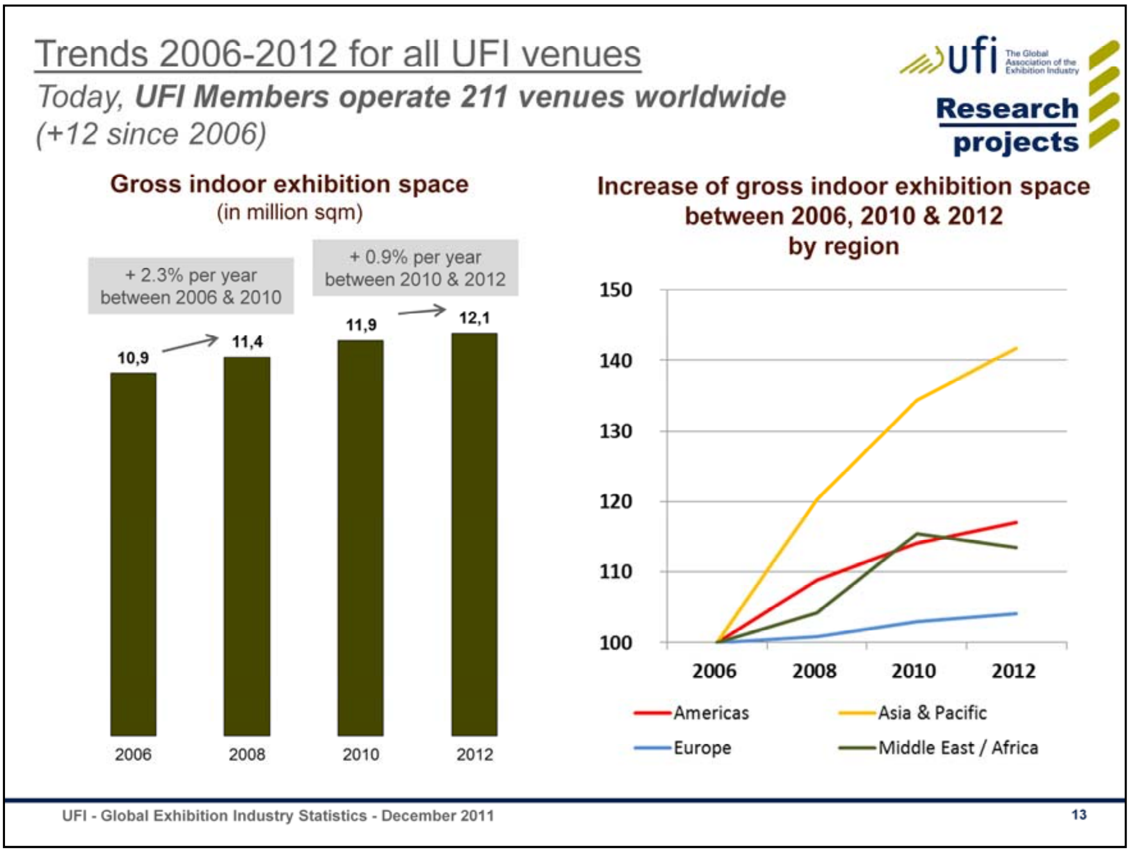


15 countries have increased their total indoor capacity by at least 50,000 sqm between 2006 and 2011.

China accounts for 46% of the global increase and 69% of the Chinese increase is related to new venues.



UFI member venues.

Today, UFI Members who operate venues manage 211 venues. That is 12 more than in 2006.

The total exhibition space managed by UFI members has grown by 2,3% a year in the 2006-2010 period. It is anticipated that this rate will slow to a 0,9% annual increase during the 2010-2012 period.

The different regional trends are interesting to notice. UFI member venue capacity in the Asia / Pacific region increased by more than 40% since 2006. This is significantly more than in the other regions. It should ne noticed however that the UFI Membership in the Americas is not necessarily fully representative.

2. GLOBAL ESTIMATES

Minimum figures (based on events
with a minimum of 500 sqm held in 2010)

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Approximately
30 700 Exhibitions
per year corresponding to
103 million sqm
of total net exhibition space
and where
2.8 million direct exhibiting companies welcomed
260 million visitors

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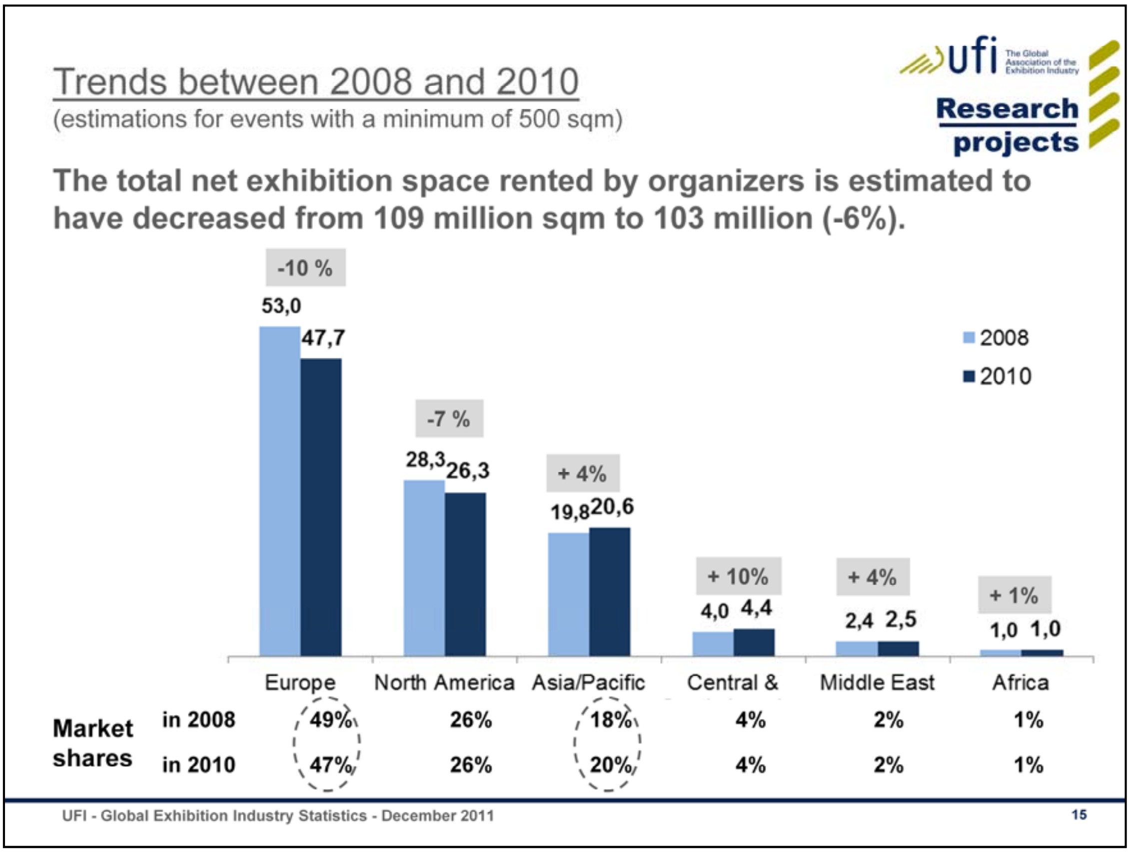
Let’s look at the event side of the exhibition industry.

In 2009, UFI released global estimates on the number of exhibitions, and the size of the exhibition market in terms of net rented exhibition space. The total number of exhibitors and visitors was added in 2010.

These figures should be considered as a minimum, as we only considered:

- events with a minimum of 500 sqm of net exhibition space

- *direct* exhibitors.



It is estimated that the global market, measured in terms of total net space rented by organizers, decreased by 6% between 2008 and 2010.

The breakdown by region is shown of this chart.

One significant change is the shift of 2% of the global market share from Europe to Asia / Pacific. However, the European market is still more than double the size of the Asia/Pacific market.

Global estimates: 10 major national markets
(Year 2010)

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NET SPACE RENTED

	(in million net sqm)	Trend since 2008
USA	23,3 (*)	- 7%
China	13,0	+ 6%
Germany	8,8	- 5%
Italy	6,2	- 5%
France	5,4	- 8%
Spain	3,5	- 24%
Japan	3,2	- 3%
UK	2,8	- 6%
Russia	2,6	- 13%
Brazil	2,6	+ 4%

(*): under review

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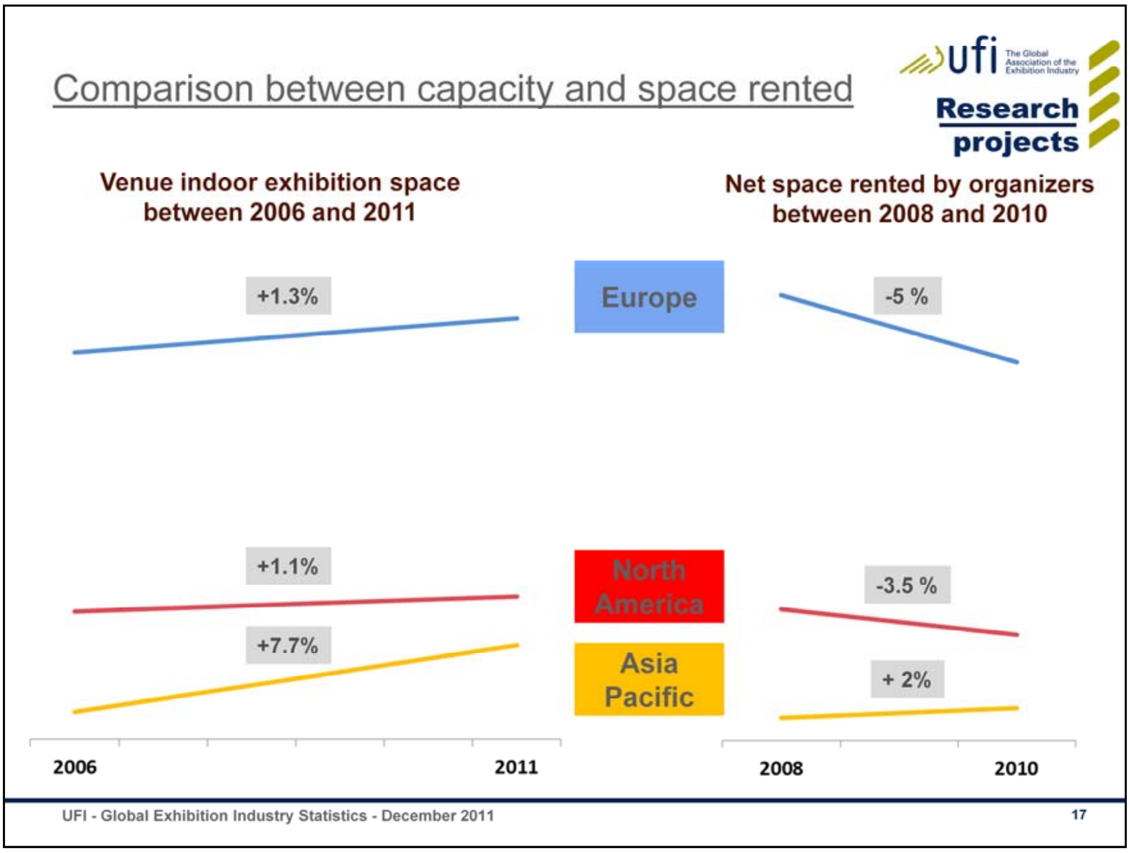
The “top 10” national markets, in terms of exhibition space rented, remain the same.

However, most of them have suffered from a decrease between 2008 and 2010.

Only 2 countries saw an increase of the size of their market: China and Brazil.



If we compare, for the main 3 regions in terms of capacity or activity, the annual average capacity trend between 2006 and 2011 and the annual activity trend between 2008 and 2010, we notice that the venue capacity continues to increase in all 3 regions, whereas the activity decreased in Europe and North America, and it increased more rapidly than the activity in Asia/Pacific.

Key metrics

(Initial analysis based on events held in 2010 only: does not take into account some biennial events held in odd years)

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	EUROPE	ASIA
Scope / source	Euro Fair Statistics (audited events)	BSG (Business Strategies Group)
Number of events Total net space rented	1 971 21 032 564 sqm	1 833 15 539 000 sqm
Average size per event	10 682	8 477
Average duration	4,0 days	Not available
Average size of booth	36 sqm	Not available
Average number of visits	30 462 visits	Not available

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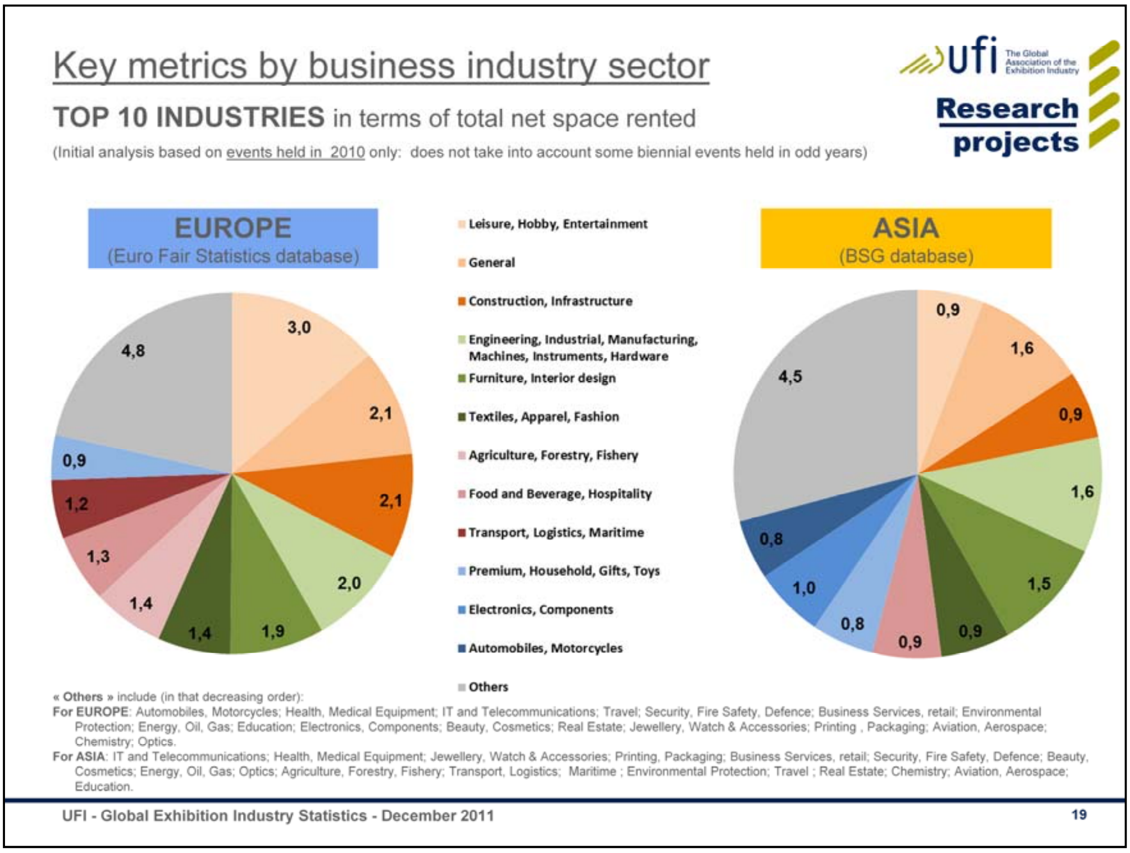
UFI also provides some metrics on characteristics and trends of the different regional exhibition markets.

This first analysis is based on 2 large databases: the one related to Euro Fair Statistics for Europe (related to most audited events / accounts for 40 to 45% of the European market) and the BSG database, which identifies most B to B events in Asia and accounts for around ¾ of that market.

Average duration, size of booth and number of visits could be calculated for Europe and the average size of exhibitions for both regions.

The average exhibition size was, in 2010, 25% higher in Europe than it is in Asia.

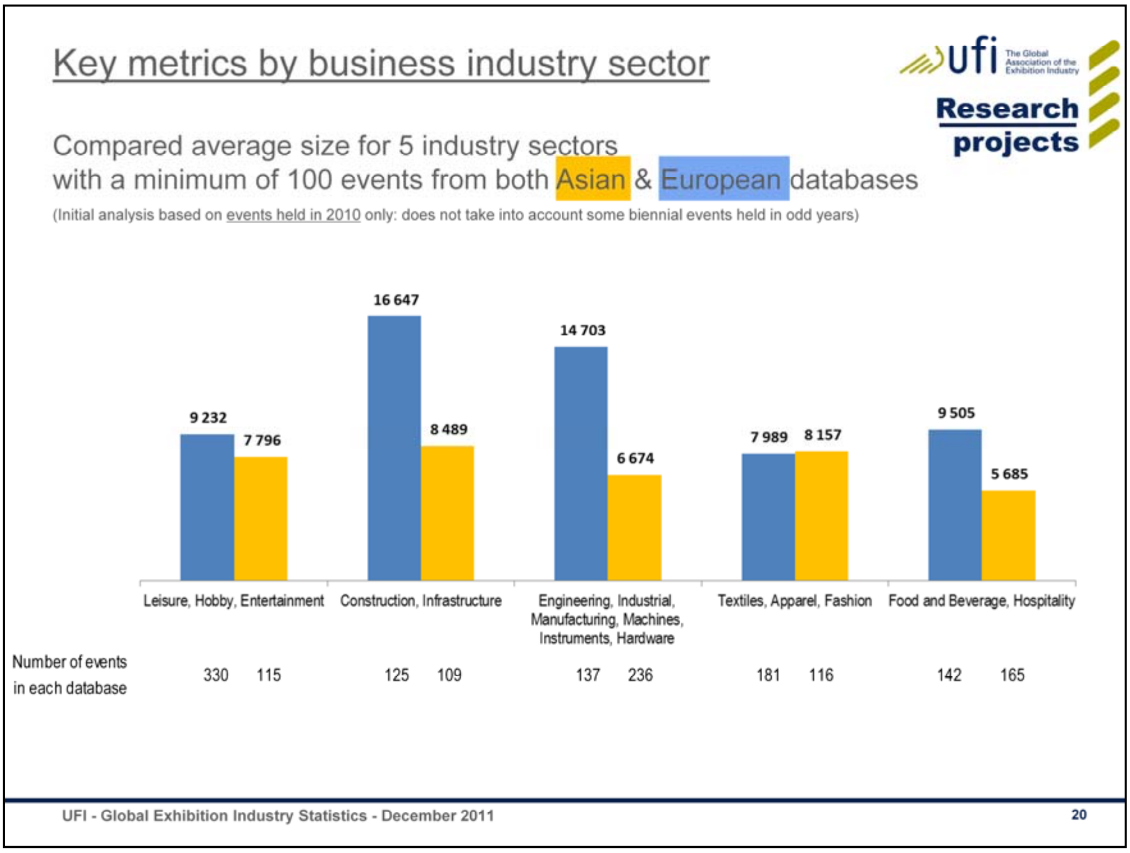


UFI also provides metrics by exhibition industry sector.

This first analysis is based on the events of 2010 only. It shall be enriched in 2012 with data from 2011 in order to take into account the biennial events held in odd years. This will significantly impact these results for some industries. It is planned to also include data from North America.

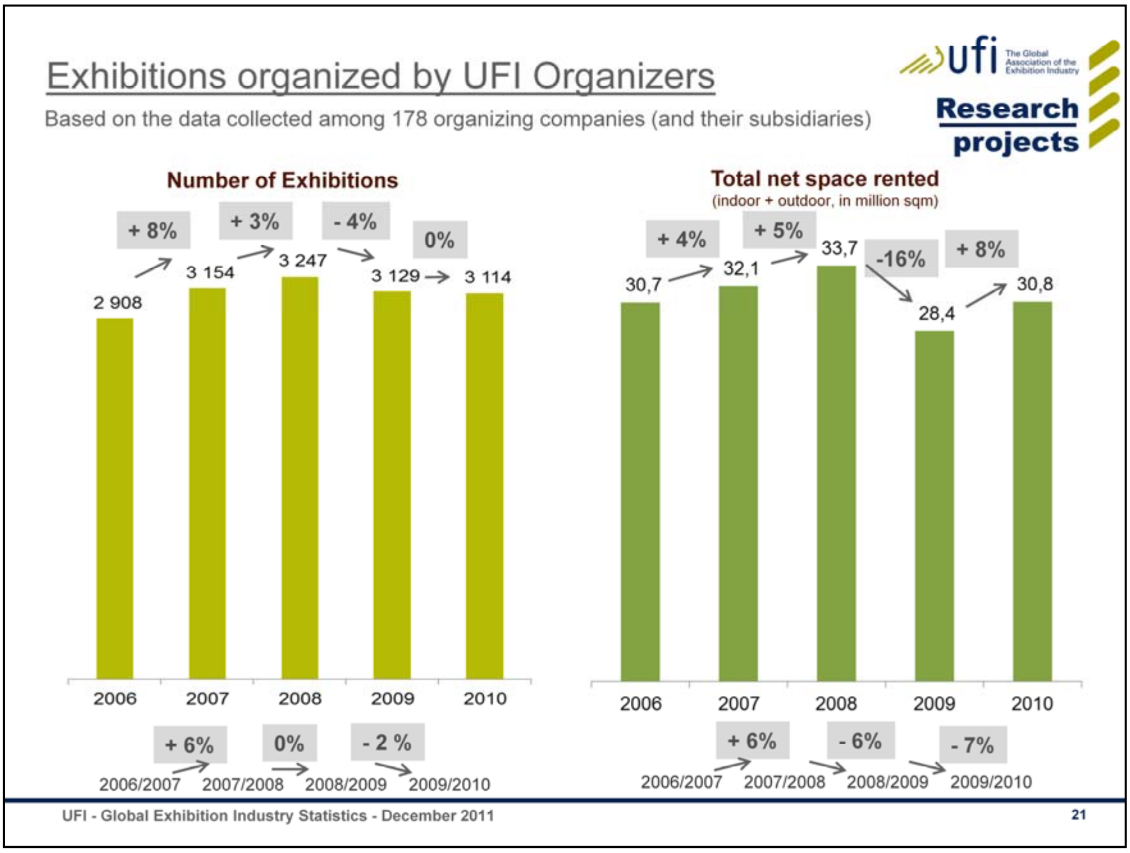
It shall also be remembered that neither of the databases used for this analysis represent the complete regional market.

Nevertheless, it provides a first look at the top 10 industries represented and it is interesting to notice that the top 6 industries represented are the same, and in the same order, in both regions.



This comparison confirms the smaller size of exhibitions in Asia compared to the one in Europe.

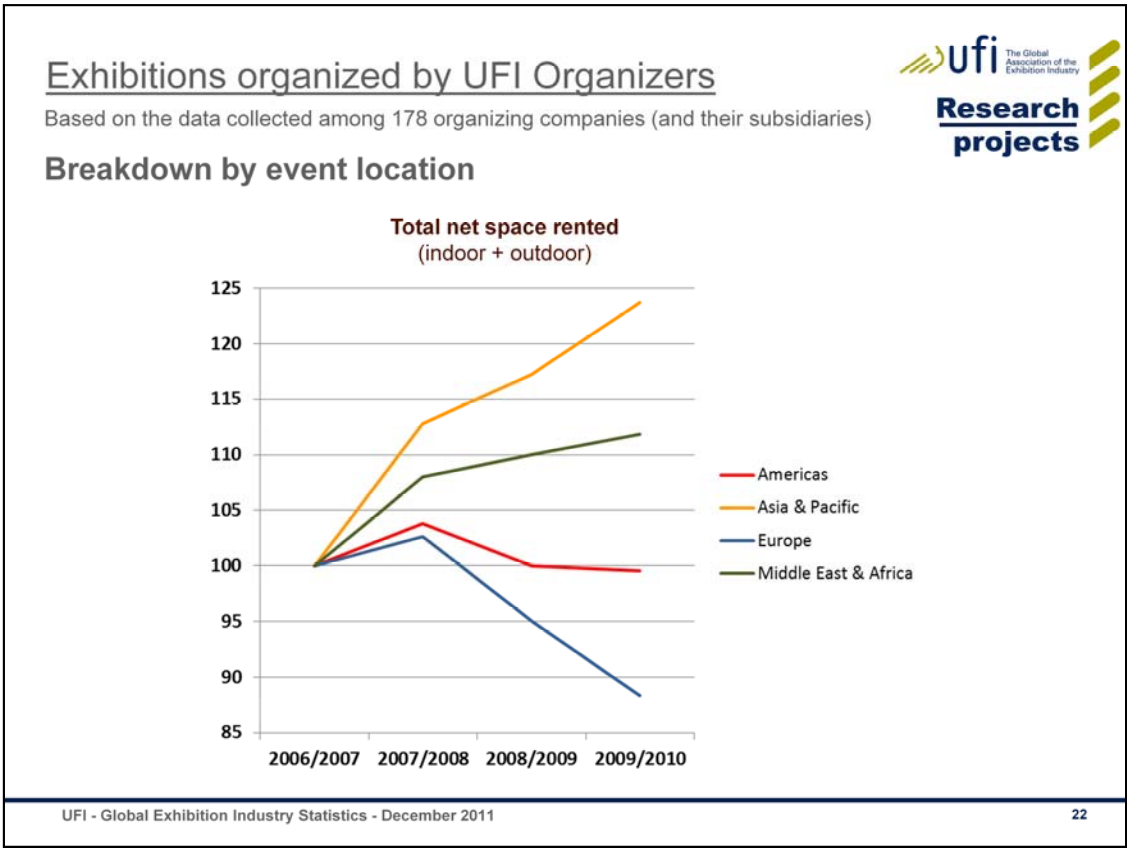
However this difference does not apply to the same extent in all sectors.



The next data set relates to the data collected by 178 UFI Members who are organizers (and their subsidiaries).

These charts consolidate the data from more than 12,500 exhibitions. We can clearly see that the positive trend during the 2006-2008 period ended in 2009 with a -16% decrease in terms of space rented. Only half of that decrease was recuperated in 2010.

The results at the bottom of the page combine 2 years as many events are biennial. For some reason, even years are, in many countries, stronger than odd years.



However, not all regions showed the same level of performance.

As you can see in this chart, on average:

- the volume of exhibition activity has increased by almost 25% in Asia / Pacific and more than 10% in Middle East & Africa

- the volume of activity in Europe has remained flat in the Americas and it had decreased by more than 10%.

These trends are average and may not reflect the situation of specific countries in that region. This also applies to Middle East versus Africa or North America versus Central & South America.

Exhibitions organized by UFI Organizers

Based on the data collected among 178 organizing companies (and their subsidiaries)

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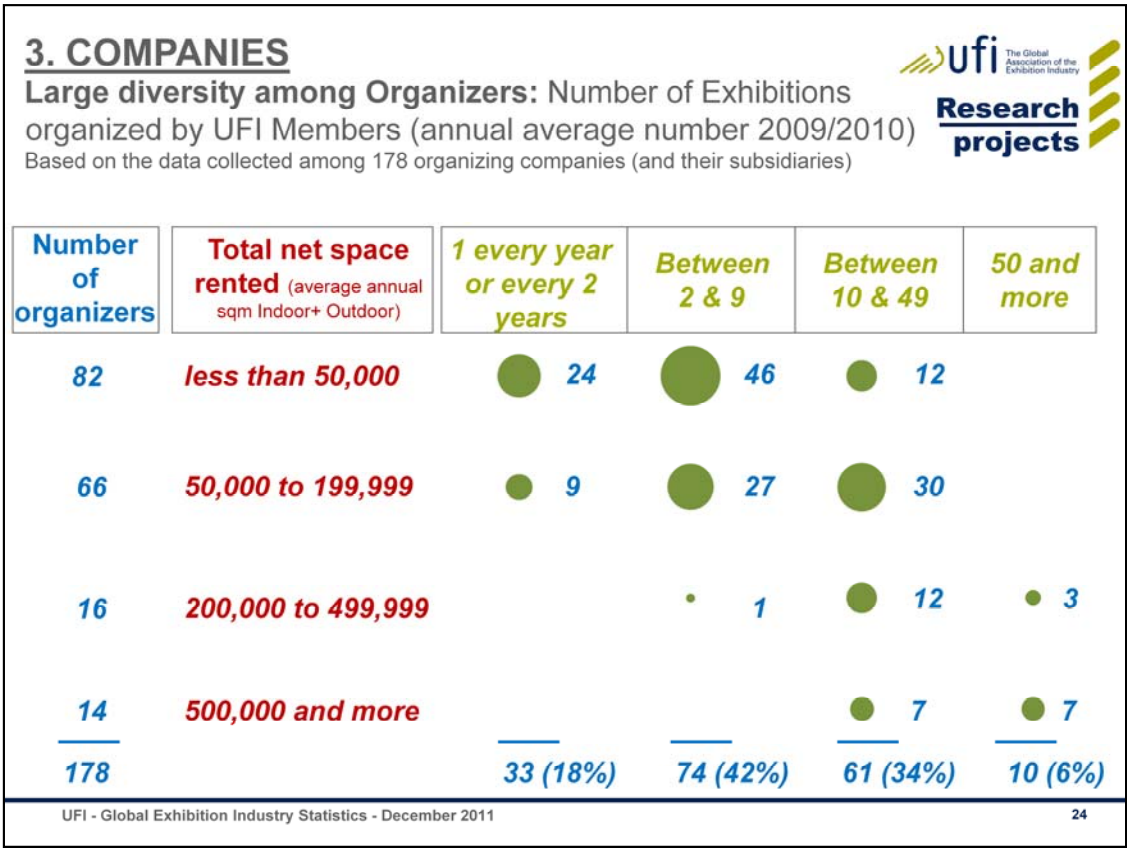
Average size

	EUROPE	ASIA
Scope	Around 2 140 exhibitions per year	Around 620 exhibitions per year
Average size in 2009/2010 (Net exhibition space)	**9 993 sqm**	**8 744 sqm**
Trend since 2006/2007	**-11%**	**+3%**

A quick comparison between the exhibitions held in Europe and Asia confirms the trends previously indicated.



Company analysis:

This chart outlines the diversity of UFI Member organizers:

-on one side, 82 companies rent up to 50 000 sqm of exhibition space in total on a yearly basis, and on the other side 14 rent more than 500 000 sqm

- in terms of the number of exhibitions organized, 18% of UFI Members (33) organize only one event every year or every 2 years; and 6% (10) organize more than 50 a year.

Internationalization: Number of countries & regions covered by UFI Organizers (annual average number for 2009 & 2010)
Based on the data collected among 178 organizing companies (and their subsidiaries)

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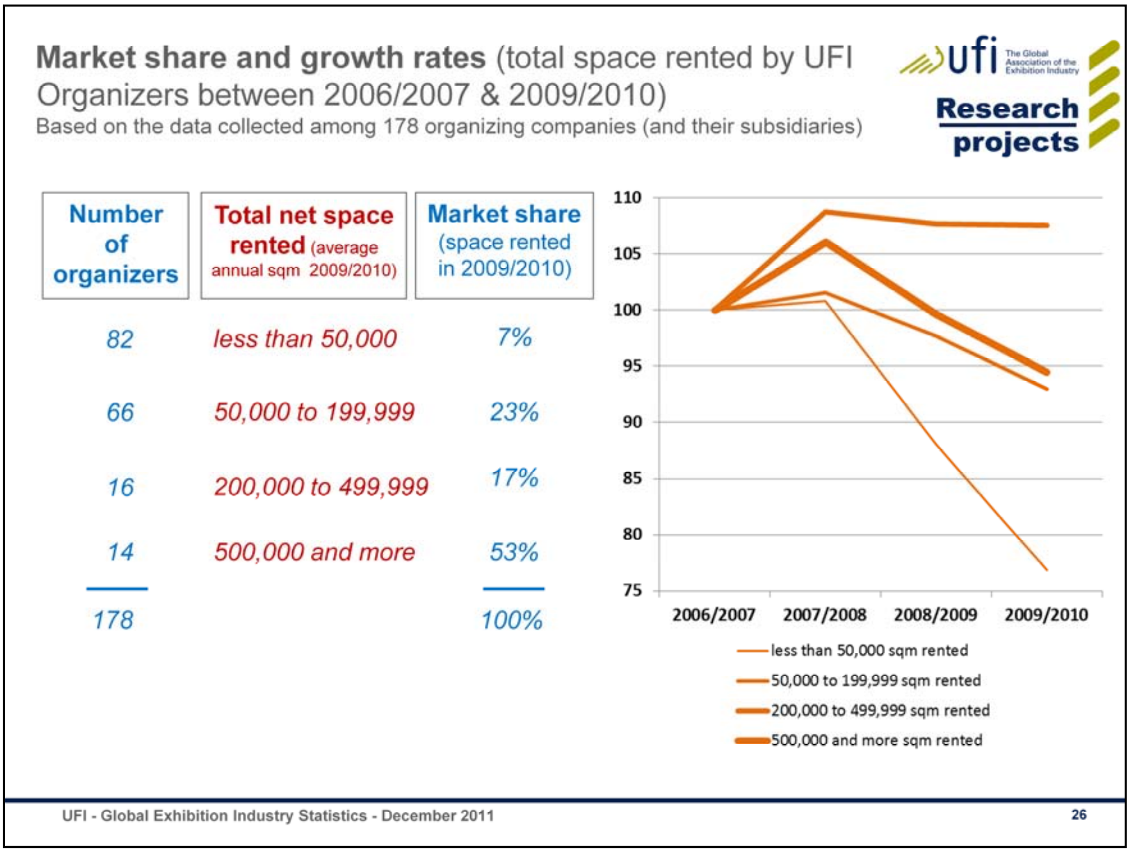
Number of organizers	Total net space rented (average annual sqm Indoor+ Outdoor)	1 country	More than one country and 1 region	2 regions	3 or 4 regions
82	less than 50,000	77	4	1	
66	50,000 to 199,999	49	7	6	4
16	200,000 to 499,999	11		3	2
14	500,000 and more	3		2	9
178		140 (79%)	11 (6%)	12 (7%)	15 (8%)

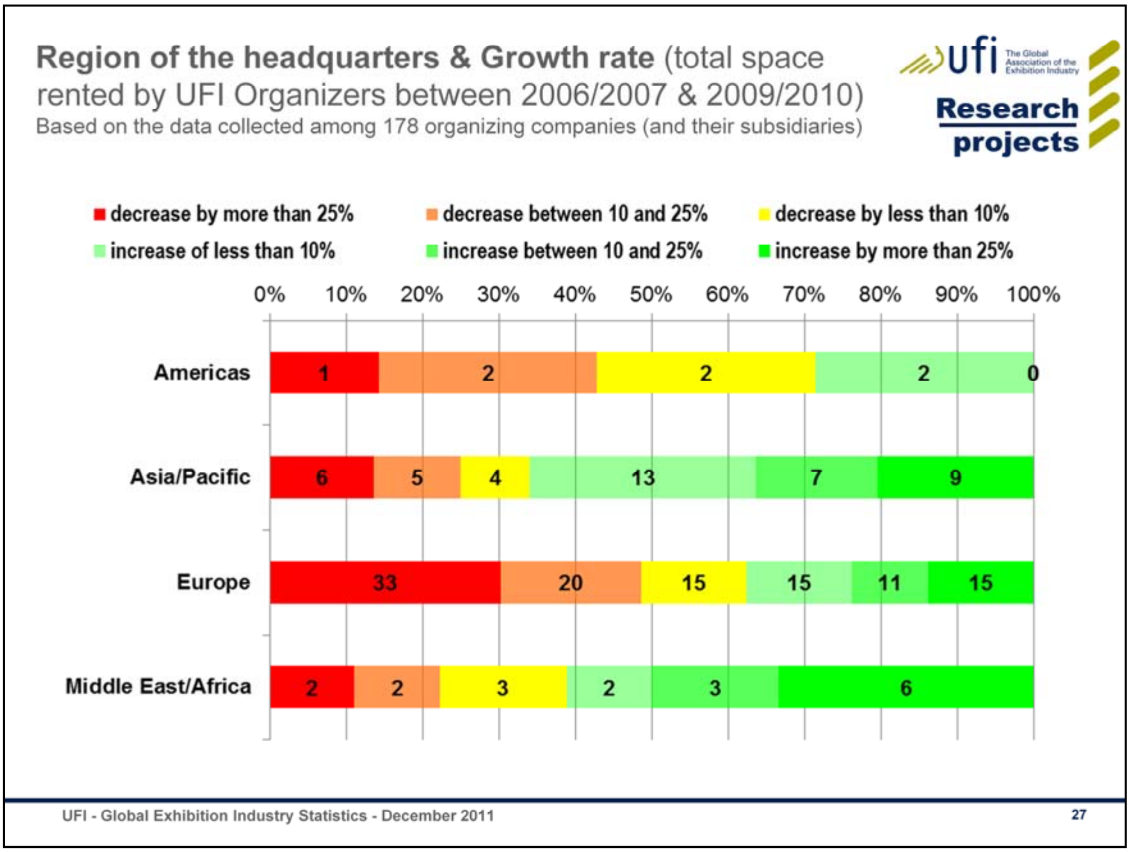
As you can see in this slide, most UFI organizers only operate in their own country.

It is also interesting to realize that only 15 companies operate in 3 or 4 regions.

Four of these companies are in fact “small” organizers (in terms of total rented space: less than 200,000 sqm/year)



This slides indicates that, on average, the “medium to large” companies performed better, over the past several years than the smaller ones or the very large ones.



This slide shows the regional differences in terms of region of the headquarters of the UFI organizer.

These results are consistent with the previous ones and those of the UFI Global Barometer, taking into account the fact that many European groups operate outside their own region.

UFI Global Exhibition Barometer

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- Survey conducted among UFI, SISO (USA), AFIDA (Central and South America) & EXSA (Southern Africa) Members
- 7th survey was conducted in June 2011
- 8th survey is ran in December 2011

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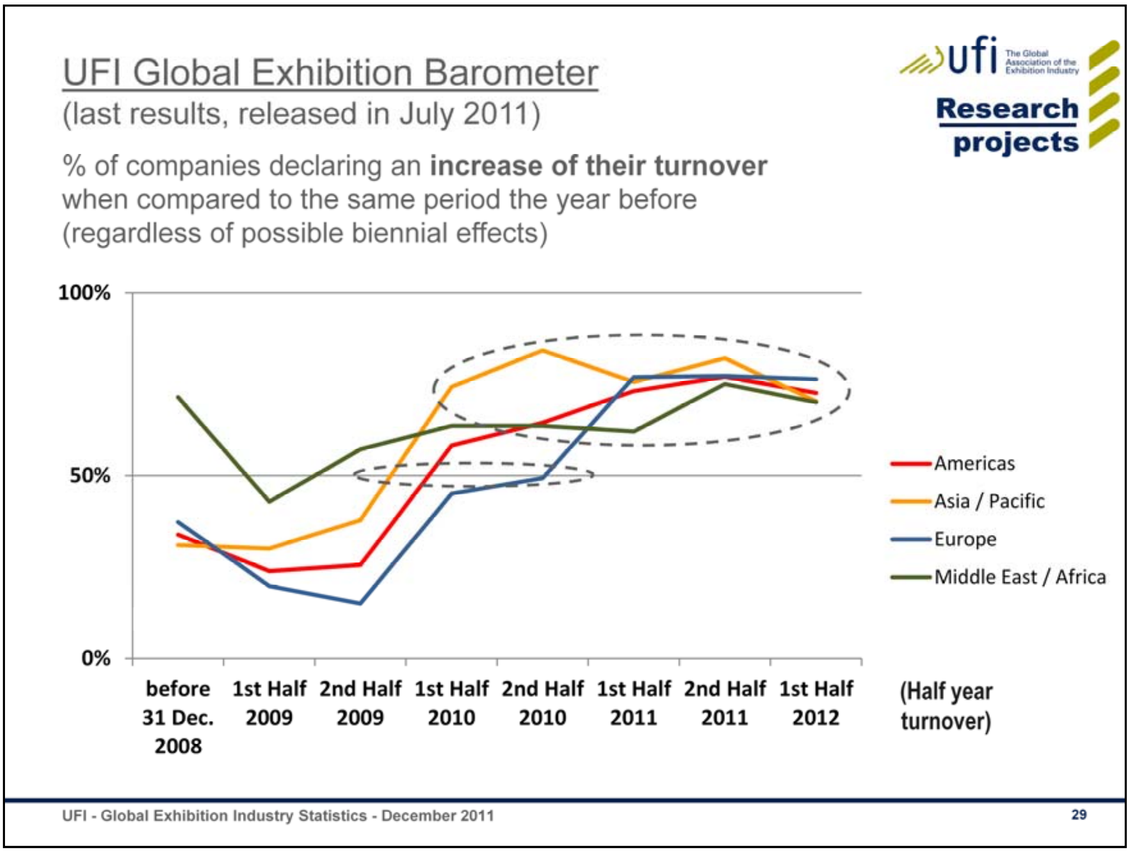
Let’s now look at the forecast outlined in the UFI Global Exhibition Barometer.

This survey was implemented in early 2009 in liaison with SISO and AFIDA for North & South America and, more recently included EXSA (Southern African countries).

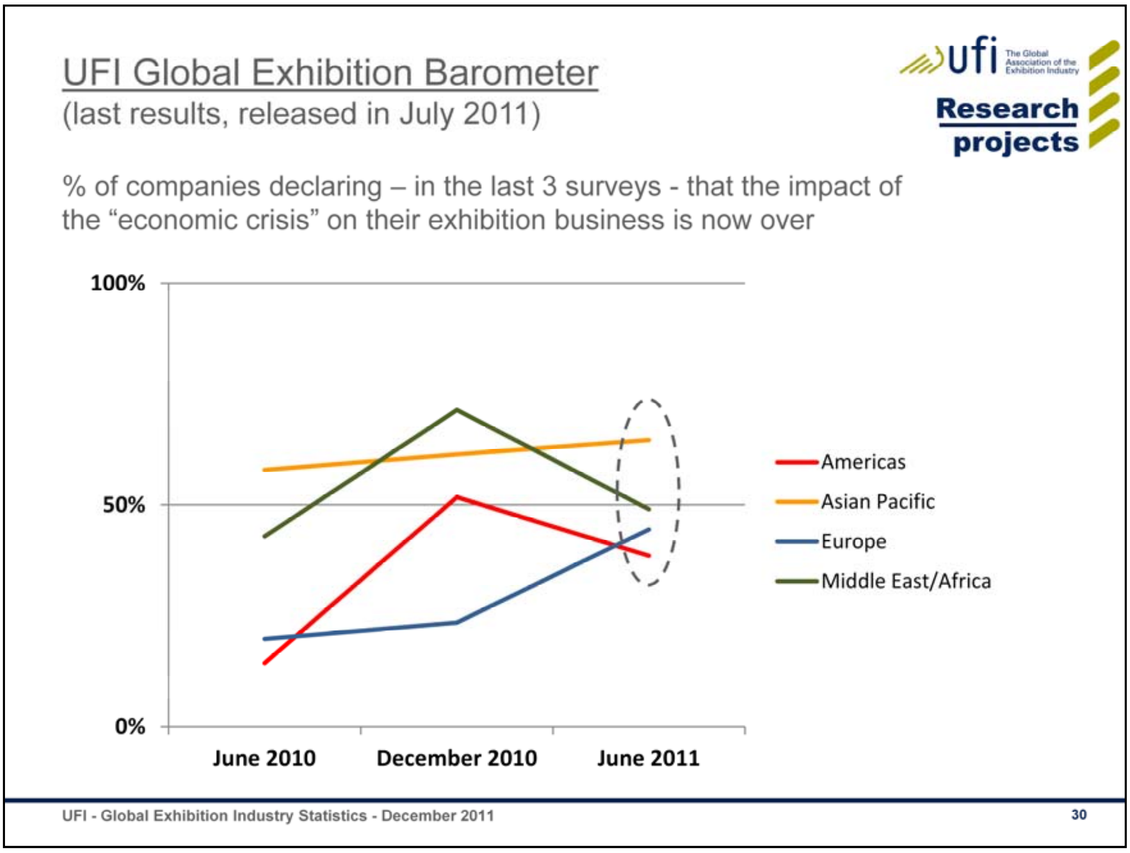


Two slides have been extracted from the report. The first one concerns turnover. It outlines the percentages of respondents who declared an increase for each half year from the end of 2008 to mid 2011. Here again there are significant regional differences.

The MEA region appears to have been least affected, with a minimum of 50% of companies declaring an increase in turnover during most periods.

For the other regions (1st dashed circle), the time when a majority of companies declared an increase in turnover ranges from the 2nd half of 2009 for Asia/Pacific to the 2nd half of 2010 for Europe.

For the first half of 2011, the percentage of companies declaring an increase in their turnover varies from 64% for Europe (first half year) to 71% for Americas (2 half) and 77% for Asia/Pacific (2 half too).



As predicted in the previous slide, the two regions where most respondents were declaring, last July, that their activity was still under the impact of the “economic crisis” are the Americas and Europe.

THANK YOU!

This presentation is freely downloadable at www.ufi.org

For any questions, please contact Christian (research@ufi.org)