



# What's new in the industry in Europe?

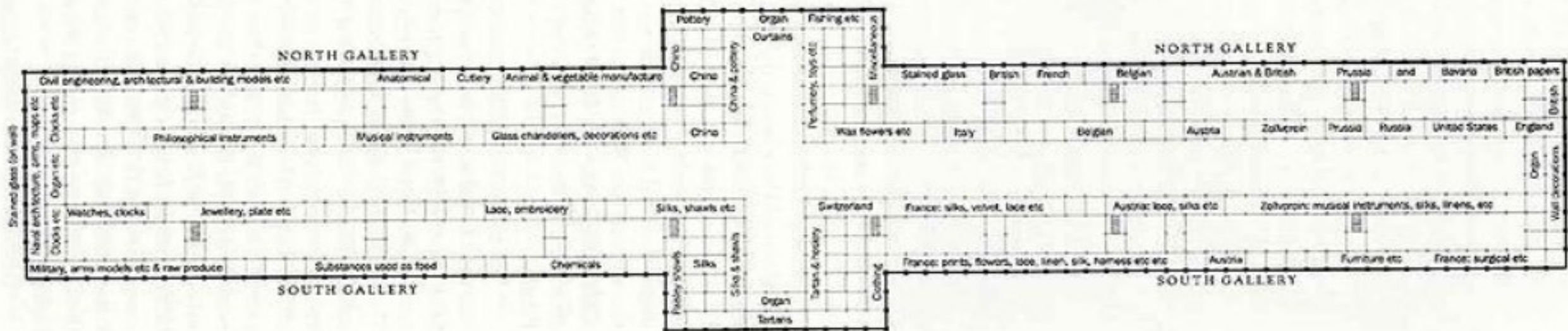
**Nick Dugdale-Moore**  
Regional Manager Europe, UFI  
[nick@ufi.org](mailto:nick@ufi.org)  [nickdmufi](https://twitter.com/nickdmufi)



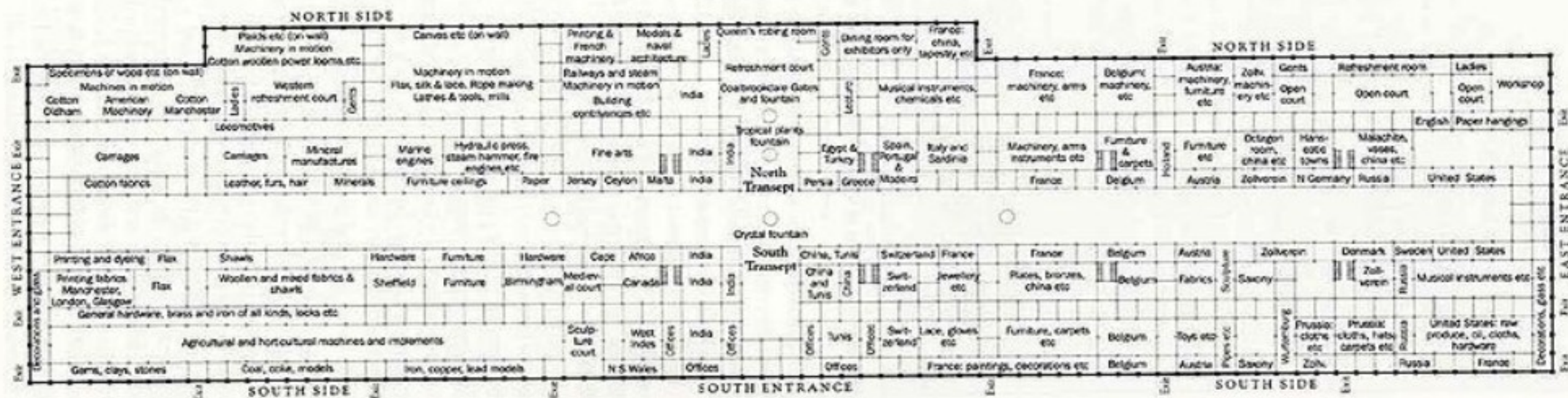




### UPPER FLOOR



### GROUND FLOOR





# 1851- the Great Exhibition - Crystal Palace, London









**How big is the European exhibition industry?  
How do we compare to the rest of the world?**

**What are the challenges for the exhibition industry  
in Europe?**

**What opportunities are there for Poland?**

**How big is the European exhibition industry?  
How do we compare to the rest of the world?**

**What are the challenges for the exhibition industry  
in Europe?**

**What opportunities are there for Poland?**

## 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**®

*Freeman is the world's leading brand experience company. They help their clients design, plan, and deliver immersive experiences for their most important audiences. Through comprehensive solutions including strategy, creative, logistics, digital solutions, and event technology, Freeman helps increase engagement and drive business results. What makes them different is their collaborative culture, intuitive knowledge, global perspective, and personalized approach.*



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



# Global Economic Impact of Exhibitions

2019 Edition



PRODUCED BY



SUPPORTED BY





# Global exhibitions impact ranking

---

The global exhibitions sector directly generated more output (business sales) than many large global sectors, including machine tools and medical & surgical equipment.

The €167.2 (\$197.5) billion of total GDP supported by exhibitions globally would rank the sector as the 56<sup>th</sup> largest economy globally, larger than the economies of countries such as Hungary, Kuwait, Sri Lanka, and Ecuador. The table on the following page compares the global exhibitions sector's total GDP impact to the GDP of countries around the world.



# GDP comparisons

Amounts in billions of Euros 2018

Rank	Country	GDP	Rank	Country	GDP	Rank	Country	GDP
1	United States	€ 19,391	31	Nigeria	€ 356	61	Sudan	€ 119
2	China	€ 12,243	32	Israel	€ 351	62	Ukraine	€ 112
3	Japan	€ 4,874	33	South Africa	€ 349	63	Morocco	€ 108
4	Germany	€ 3,691	34	Hong Kong, China	€ 342	64	Ecuador	€ 103
5	France	€ 2,587	35	Ireland	€ 334	65	Slovak Republic	€ 96
6	United Kingdom	€ 2,536	36	Denmark	€ 325	66	Cuba	€ 94
7	India	€ 2,521	37	Singapore	€ 324	67	Sri Lanka	€ 85
8	Brazil	€ 2,055	38	Malaysia	€ 314	68	Kenya	€ 77
9	Italy	€ 1,942	39	Philippines	€ 314	69	Guatemala	€ 76
10	Canada	€ 1,652	40	Colombia	€ 309	70	Dominican Republic	€ 76
11	Russia	€ 1,578	41	Pakistan	€ 303	71	Ethiopia	€ 76
12	South Korea	€ 1,530	42	Chile	€ 277	72	Oman	€ 70
13	Australia	€ 1,379	43	Finland	€ 252	73	Myanmar	€ 66
14	Spain	€ 1,321	44	Bangladesh	€ 245	74	Luxembourg	€ 63
15	Mexico	€ 1,152	45	Vietnam	€ 221	75	Panama	€ 62
16	Indonesia	€ 1,016	46	Portugal	€ 218	76	Uruguay	€ 59
17	Turkey	€ 851	47	Czech Republic	€ 217	77	Belarus	€ 58
18	Netherlands	€ 829	48	Peru	€ 215	78	Costa Rica	€ 58
19	Saudi Arabia	€ 684	49	Romania	€ 211	79	Bulgaria	€ 57
20	Switzerland	€ 679	50	Greece	€ 200	80	Croatia	€ 55
21	Argentina	€ 637	51	Egypt	€ 195	81	Tanzania	€ 52
22	Taiwan	€ 573	52	New Zealand	€ 184	82	Lebanon	€ 52
23	Sweden	€ 539	53	Iraq	€ 177	83	Macao, China	€ 50
24	Poland	€ 524	54	Algeria	€ 170	84	Libya	€ 50
25	Belgium	€ 494	55	Qatar	€ 168	85	Slovenia	€ 49
26	Thailand	€ 455	56	Exhibitions globally	€ 167	86	Lithuania	€ 47
27	Iran, Islamic Rep.	€ 419	57	Kazakhstan	€ 152	87	Ghana	€ 47
28	Austria	€ 418	58	Hungary	€ 139	88	Uzbekistan	€ 46
29	Norway	€ 397	59	Angola	€ 132	89	Serbia	€ 41
30	United Arab Emirates	€ 378	60	Kuwait	€ 120	90	Jordan	€ 41



52	New Zealand	€ 184
53	Iraq	€ 177
54	Algeria	€ 170
55	Qatar	€ 168
<b>56</b>	<b>Exhibitions globally</b>	<b>€ 167</b>
57	Kazakhstan	€ 152
58	Hungary	€ 139
59	Angola	€ 132
60	Kuwait	€ 120

---

**Ranked in terms of GDP of countries in the world..**

**... the exhibition industry ranks 56th**



---

**Ranked in terms of GDP of countries in the world..**

**... the exhibition industry ranks 56th**

Rank ▲	Name	2019 Population	GDP (IMF '19)	GDP (UN '16)	GDP Per Capita	☰
1	<a href="#">United States</a>	329,064,917	21.41 trillion	18.62 trillion	\$65,064	
2	<a href="#">China</a>	1,433,783,686	15.54 trillion	11.22 trillion	\$10,841	
3	<a href="#">Japan</a>	126,860,301	5.36 trillion	4.94 trillion	\$42,269	
4	<a href="#">Germany</a>	83,517,045	4.42 trillion	3.48 trillion	\$52,885	
5	<a href="#">India</a>	1,366,417,754	3.16 trillion	2.26 trillion	\$2,309	
6	<a href="#">France</a>	65,129,728	3.06 trillion	2.47 trillion	\$46,984	
7	<a href="#">United Kingdom</a>	67,530,172	3.02 trillion	2.65 trillion	\$44,759	
8	<a href="#">Italy</a>	60,550,075	2.26 trillion	1.86 trillion	\$37,349	
9	<a href="#">Brazil</a>	211,049,527	2.26 trillion	1.80 trillion	\$10,693	
10	<a href="#">Canada</a>	37,411,047	1.91 trillion	1.53 trillion	\$51,015	
11	<a href="#">South Korea</a>	51,225,308	1.78 trillion	1.41 trillion	\$34,703	
12	<a href="#">Russia</a>	145,872,256	1.75 trillion	1.25 trillion	\$12,026	
13	<a href="#">Spain</a>	46,736,776	1.58 trillion	1.24 trillion	\$33,889	
14	<a href="#">Australia</a>	25,203,198	1.58 trillion	1.30 trillion	\$62,765	
15	<a href="#">Mexico</a>	127,575,529	1.29 trillion	1.08 trillion	\$10,073	
16	<a href="#">Indonesia</a>	270,625,568	1.15 trillion	932.26 billion	\$4,260	
17	<a href="#">Netherlands</a>	17,097,130	994.77 billion	777.23 billion	\$58,184	
18	<a href="#">Turkey</a>	83,429,615	961.65 billion	863.71 billion	\$11,527	
19	<a href="#">Switzerland</a>	8,591,365	779.33 billion	668.85 billion	\$90,710	
20	<a href="#">Saudi Arabia</a>	34,268,528	759.22 billion	639.62 billion	\$22,155	
21	<a href="#">Argentina</a>	44,780,677	659.69 billion	545.87 billion	\$14,732	
22	<a href="#">Poland</a>	37,887,768	649.97 billion	471.40 billion	\$17,155	
23	<a href="#">Sweden</a>	10,036,379	628.80 billion	514.48 billion	\$62,652	
24	<a href="#">Taiwan</a>	23,773,876	620.60 billion		\$26,104	
25	<a href="#">Belgium</a>	11,539,328	587.70 billion	467.96 billion	\$50,930	



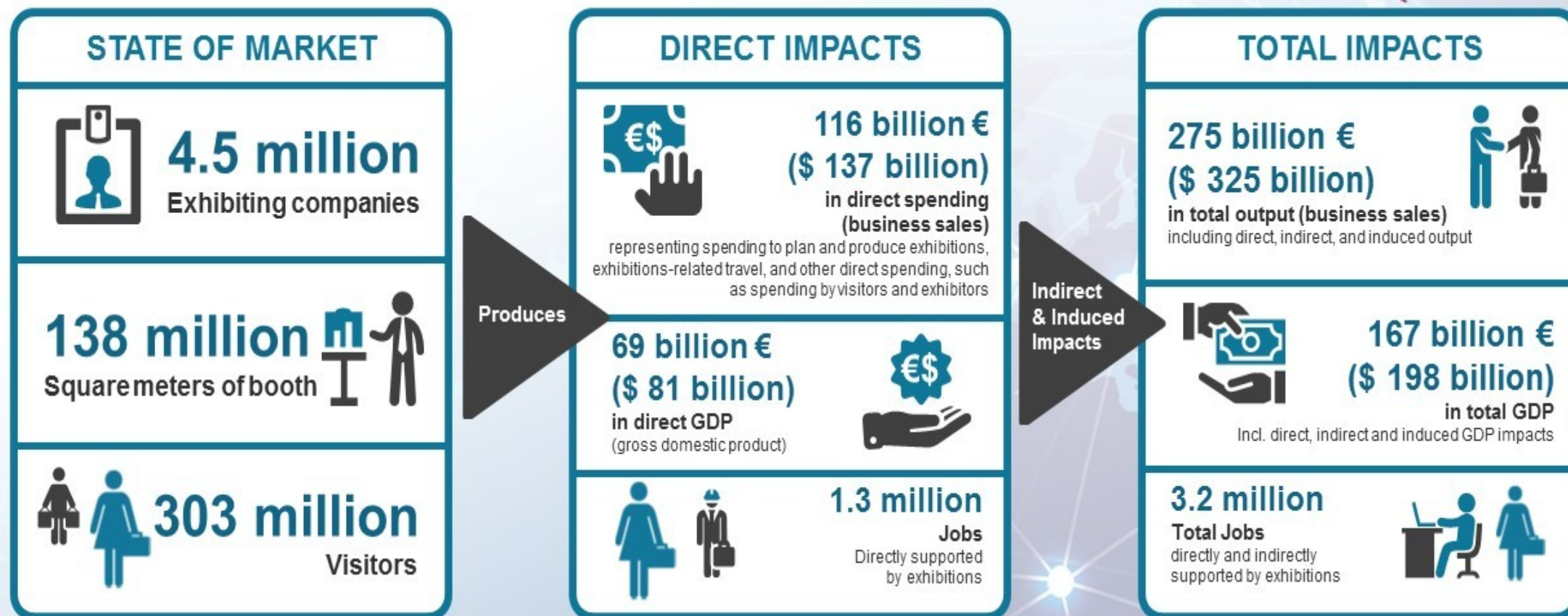
In 2017 the global economy **grew 3-3.5%**

---

In 2017 global exhibition industry grew **3.5-4%**

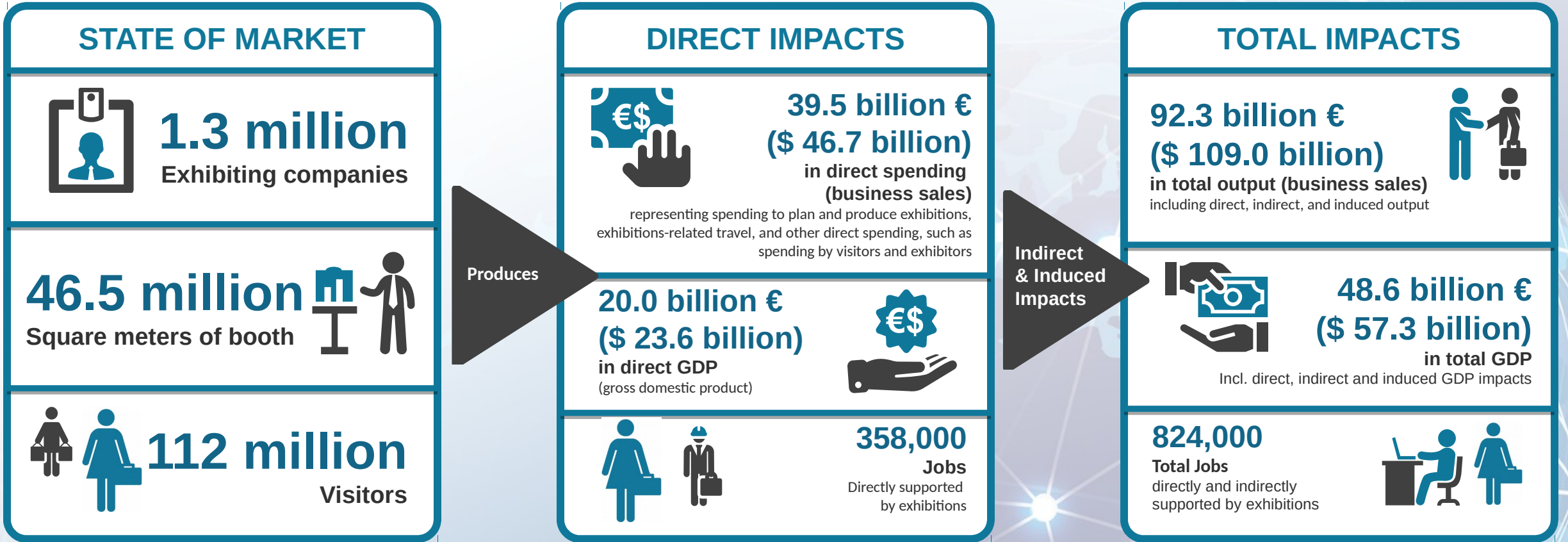
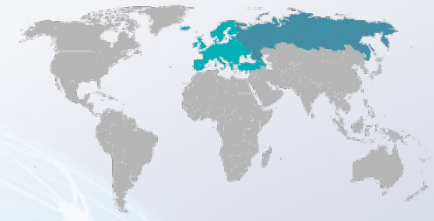
The exhibition industry **consistently  
outperforms** global GDP!

# Global Economic Impact of Exhibitions: World





# Global Economic Impact of Exhibitions: Europe



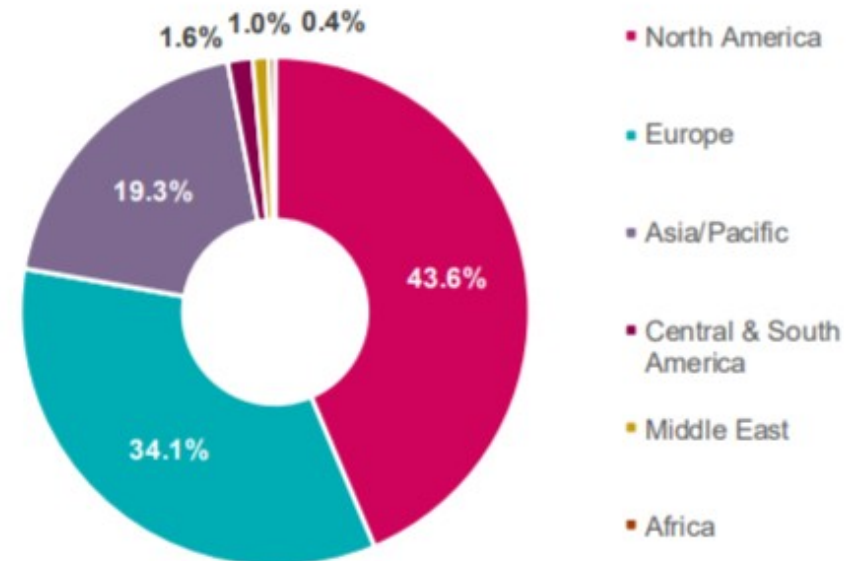
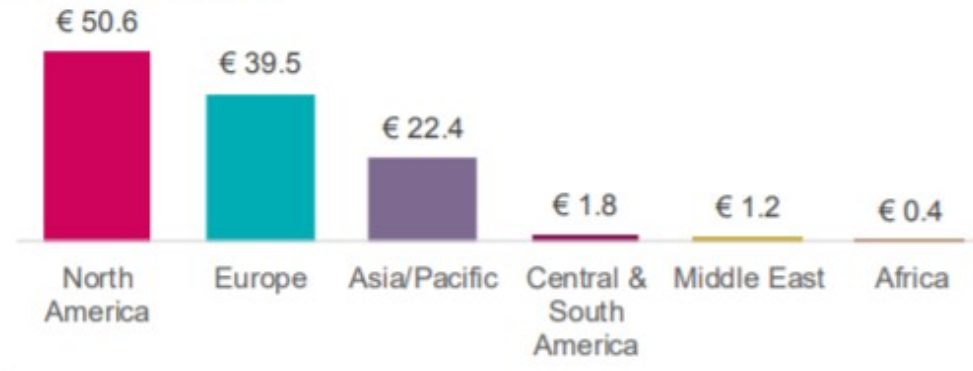
# Exhibitions direct spending

Exhibitions in North America generated €50.6 (\$59.7) billion of exhibitions direct spending in 2018, as shown in the accompanying chart, representing 43.6% of global exhibitions direct spending. Exhibitions in Europe and Asia/Pacific generated €39.5 (\$46.7) billion and €22.4 (\$26.4) billion in direct spending, representing 34.1% and 19.3% of global direct spending, respectively.

North America and Europe are the top regions in terms of exhibitions direct spending.

## Exhibitions direct spending by region

In billions, Euros, 2018





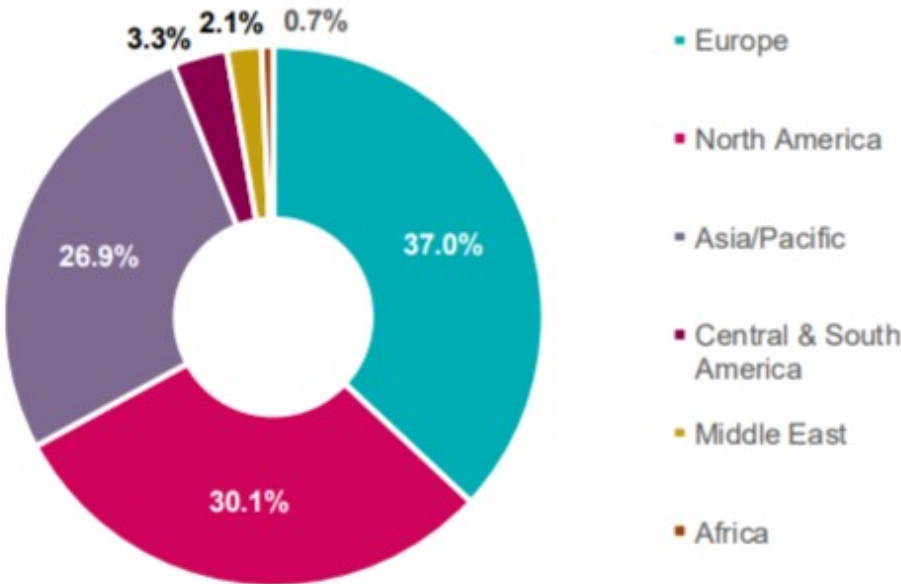
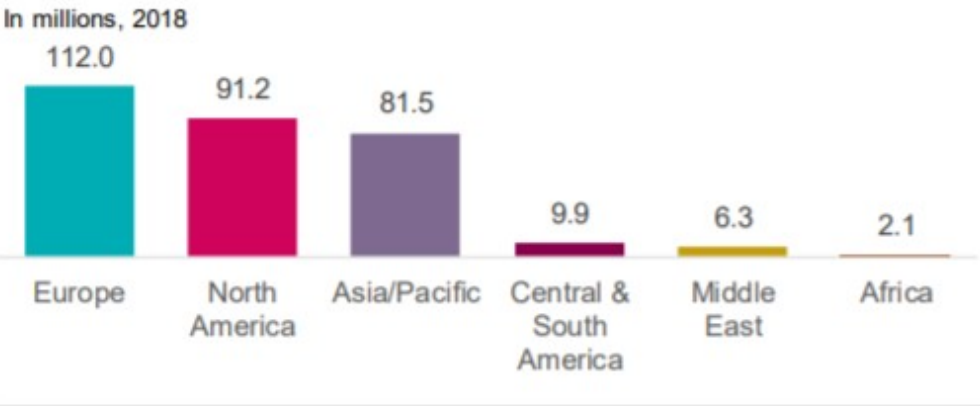
# Exhibitions visitors

Europe was the largest market in terms of exhibition participants, hosting 112.0 million visitors, representing more than one-third of total visitors worldwide in 2018. North America ranked second, hosting 91.2 million visitors (30.1% of worldwide visitors) in 2018. Asia/Pacific ranked third with 81.5 million visitors, representing 26.9% of global visitors. Central & South America, the Middle East, and Africa followed, each hosting less than 10 million exhibition visitors in 2018.

In terms of number of participants, Europe represents the largest region.



Exhibitions visitors by region



# Exhibitions

## direct spending per exhibitor

Exhibitions generated €115.9 (\$136.9) billion of direct spending in 2018. Based on a global total of 4.5 million exhibitors in 2018, direct spending per exhibitor amounted to €25,569 (\$30,201).

North America ranked first with € 31,601 (\$37,325) in direct spending per exhibitor. Europe and Asia/Pacific followed with €29,512 (\$34,858) and €18,482 (\$21,830) in direct spending per exhibitor, respectively.

Exhibitions generated approximately €25,600 (\$30,200) in direct spending per exhibitor on a global basis in 2018.



Exhibitions direct spending per exhibitor

	Exhibitors (000's)	Direct spending		Direct spending per exhibitor	
		(billions Euros)	(billions US\$)	(Euros)	(US\$)
Global total	4,534	€ 115.9	\$136.9	€ 25,569	\$30,201
By region					
North America	1,600	€ 50.6	\$59.7	€ 31,601	\$37,325
Europe	1,340	€ 39.5	\$46.7	€ 29,512	\$34,858
Asia/Pacific	1,210	€ 22.4	\$26.4	€ 18,482	\$21,830
Central & South America	217	€ 1.8	\$2.2	€ 8,433	\$9,961
Middle East	125	€ 1.2	\$1.4	€ 9,461	\$11,174
Africa	42	€ 0.4	\$0.5	€ 10,663	\$12,594

In Euros, 2018





# Exhibitions direct spending per square meter of venue capacity

Exhibitions generated €115.9 (\$136.9) billion of direct spending in 2018. Based on a global total of 34.68 million square meters of venue capacity measured in terms of gross indoor exhibition space (as reported in the UFI World Map of Exhibition Venues), direct spending per square meter of venue capacity amounted to €3,343 (\$3,948).

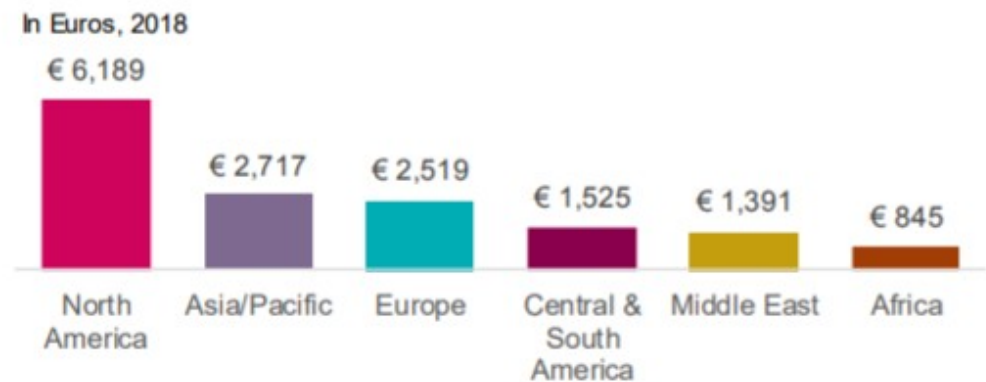
North America ranked first with €6,189 (\$7,310) in direct spending per square meter of venue capacity. Asia/Pacific and Europe followed with €2,717 (\$3,210) and €2,519 (\$2,975) in direct spending per square meter of venue capacity, respectively.

Exhibitions generated €3,300 (\$3,900) in direct spending per square meter of venue capacity on a global basis in 2018.



Exhibitions direct spending per square meter of capacity

	Capacity (million square meters)	Capacity (million square feet)	Direct spending		Direct spending per square meter of capacity		Direct spending per square foot of capacity	
			(billions Euros)	(billions US\$)	(Euros)	(US\$)	(Euros)	(US\$)
Global total	34.68	373.29	€ 115.9	\$136.9	€ 3,343	\$3,948	€ 311	\$367
By region								
North America	8.17	87.94	€ 50.6	\$59.7	€ 6,189	\$7,310	€ 575	\$679
Europe	15.70	168.99	€ 39.5	\$46.7	€ 2,519	\$2,975	€ 234	\$276
Asia/Pacific	8.23	88.59	€ 22.4	\$26.4	€ 2,717	\$3,210	€ 252	\$298
Central & South America	1.20	12.92	€ 1.8	\$2.2	€ 1,525	\$1,801	€ 142	\$167
Middle East	0.85	9.15	€ 1.2	\$1.4	€ 1,391	\$1,643	€ 129	\$153
Africa	0.53	5.70	€ 0.4	\$0.5	€ 845	\$998	€ 78	\$93



# Euro Fair Statistics 2018





# FACTS ABOUT EURO FAIR STATISTICS

The 2017 edition contains the certified statistics of 2 709 exhibitions from the following 24 countries:

Austria .....	19
Belgium.....	81
Bulgaria .....	5
Switzerland .....	132
Czech Republic .....	28
Germany.....	185
Spain .....	381
France .....	614
Croatia.....	5
Hungary .....	15
Italy .....	181
Luxembourg.....	5
Monaco.....	1
Moldavia .....	2
The Netherlands .....	102
Portugal.....	29
Poland .....	192
Romania .....	12
Russia.....	139
Sweden.....	23
Finland.....	59
Slovenia.....	1
Turkey.....	476
Ukraine .....	22

## Industry sector (UFI code)

Leisure, Hobby, Entertainment (3)
Agriculture, Forestry, Fishery (1)
Engineering, Industrial, Manufacturing, Machines, Instruments, Hardware
Construction, Infrastructure (5)
Food and Beverage, Hospitality (2)
General (27)
Furniture, Interior design (12)
Automobiles, Motorcycles (16)
Textiles, Apparel, Fashion (25)
Premium, Household, Gifts, Toys (13)
Transport, Logistics, Maritime (26)
Health, Medical Equipment (22)
Business Services, retail (4)
IT and Telecommunications (21)
Jewelry, Watch & Accessories (24)
Security, Fire Safety, Defense (7)
Travel (6)

**How big is the European exhibition industry?**  
**How do we compare to the rest of the world?**

**What are the challenges for the exhibition industry in Europe?**

**What opportunities are there for Poland?**







# 2019 – a sign of things to come?



📌 Pinned Tweet



**Paddy Cosgrave** @paddycosgrave · Nov 18, 2017

Over €300 million is Government's estimated economic impact of [#WebSummit](#) 17 to Portugal. More than half a billion since Nov 16

IMHO long term value is more important: global reputation, platform for PT companies, inspiration to younger generation 🇵🇹🙌





**Paddy Cosgrave** @paddycosgrave · Apr 30

But the real value IMHO, the real holy grail, is not in scaling new events, so much as it is in the underlying software that we continue to build. Software is eating the world, and it will eventually eat the “meetings” industry, a silent giant larger than the entire auto industry



[Show this thread](#)



# UFI & Explori Global Visitor Insights 2018/19 Edition

PRODUCED BY:



SUPPORTED BY:



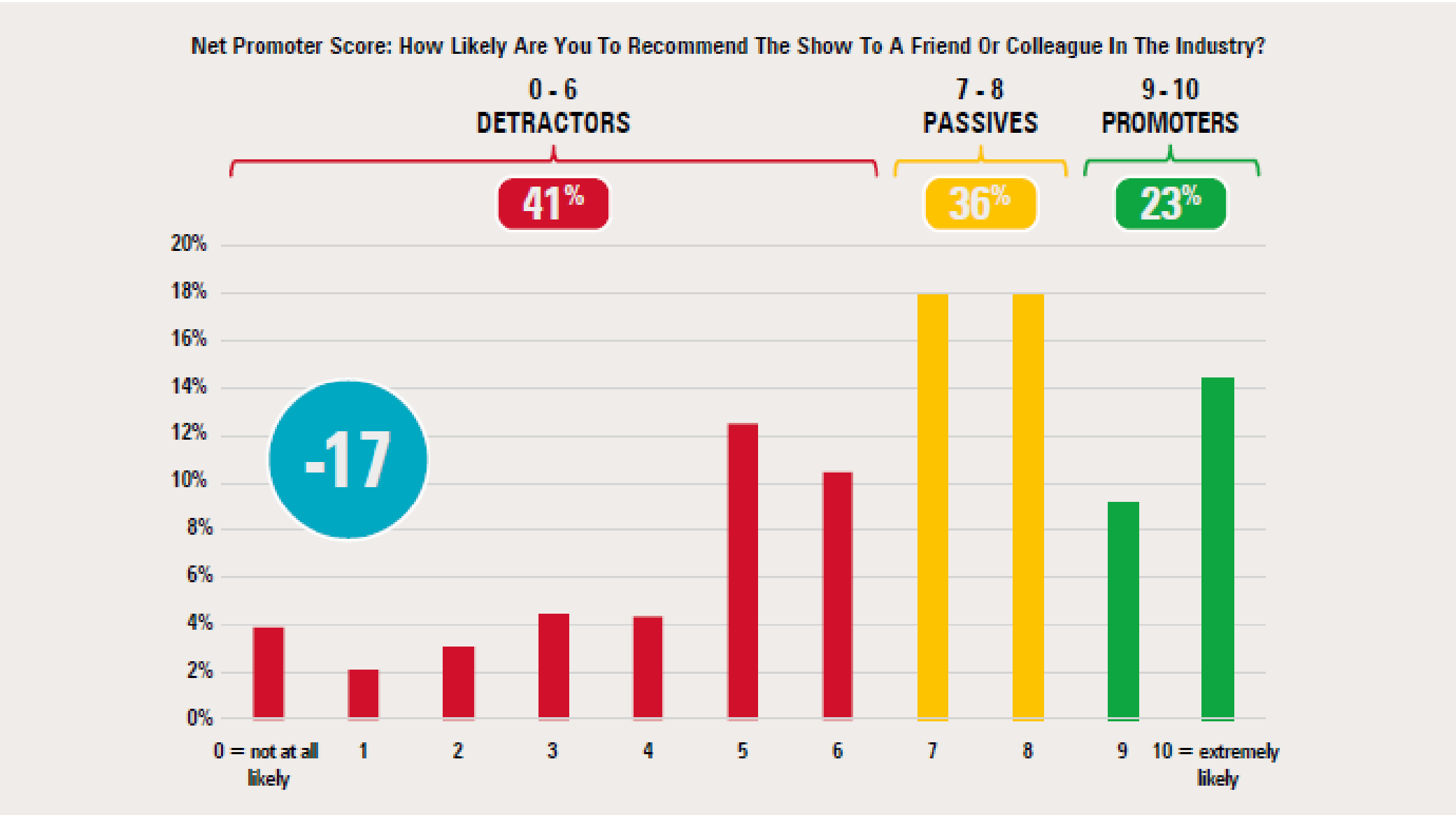
[www.ufi.org/research](http://www.ufi.org/research)



## EXPLORI SURVEYED TRADE SHOW VISITORS AROUND THE WORLD



# Detractors, Passives and Promoters: How Do Our Exhibitors Feel?



## We face serious challenges – visitors

### % OF RESPONDENTS WHO SAY TRADE SHOWS ARE GETTING WORSE BY REGION

Americas



APAC



Europe



Africa/Middle East





## Biggest pain points for visitors?

**THINKING ABOUT THE RECENT TRADE SHOWS YOU HAVE ATTENDED  
WHICH OF THE FOLLOWING HAVE BEEN YOUR MAIN FRUSTRATIONS?**

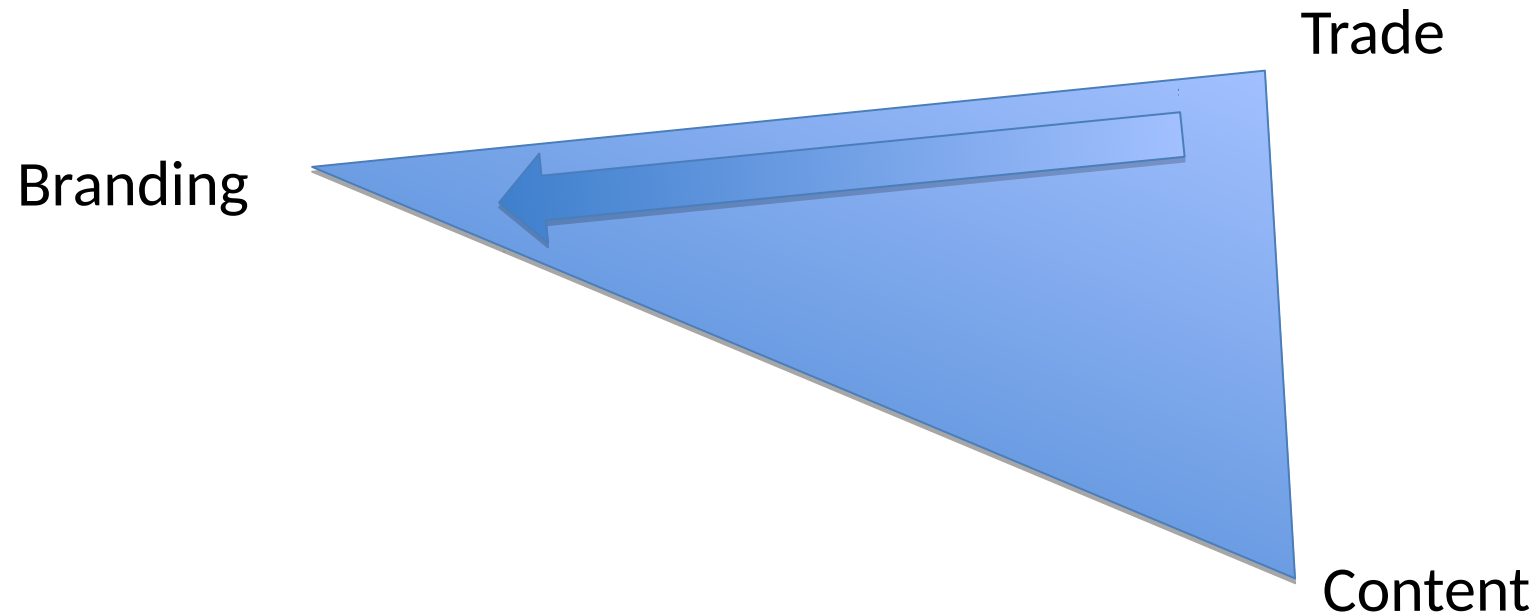


# An Industry in Transformation?



# The long term shift

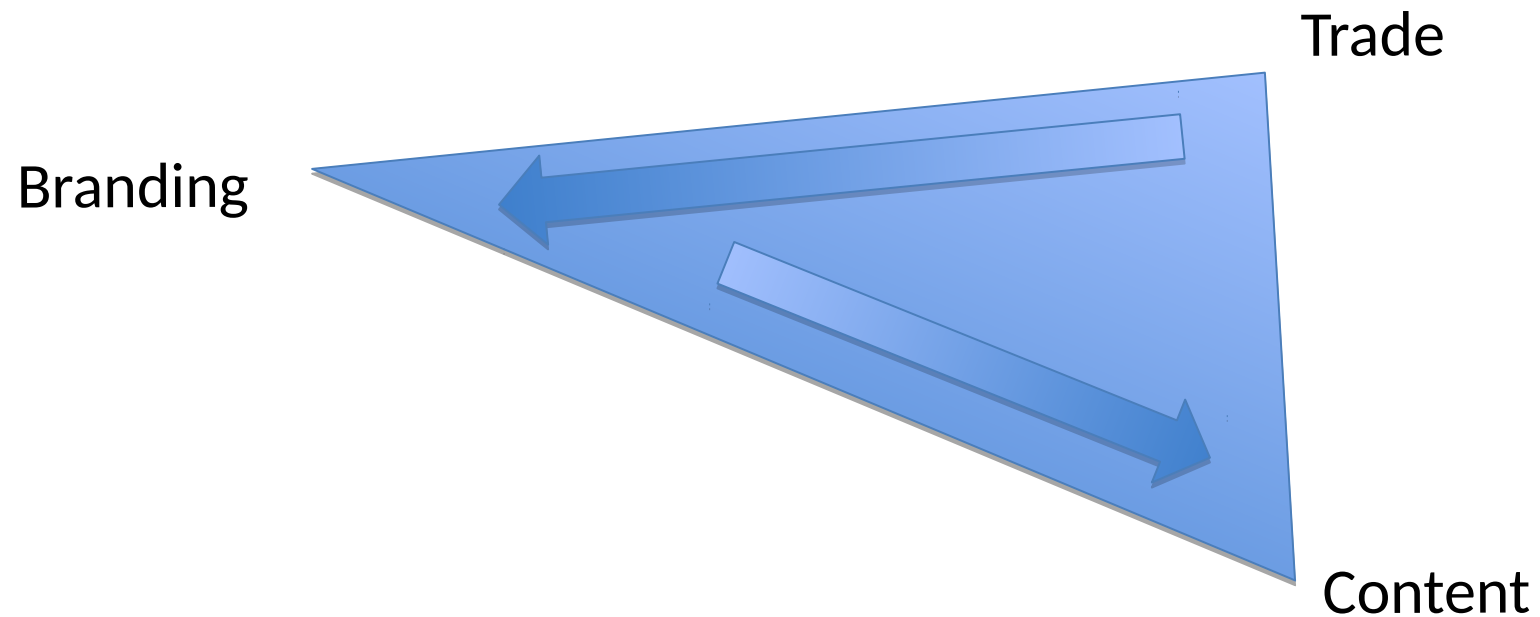
The purpose of exhibitions is changing





# The long term shift

The purpose of exhibitions is changing







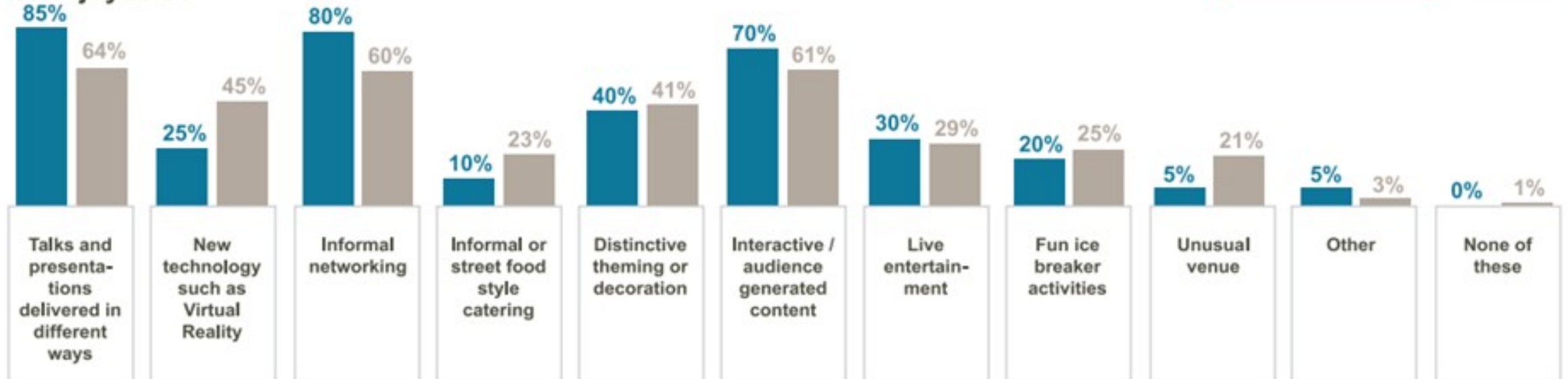


# Festivalization – what can I do?

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

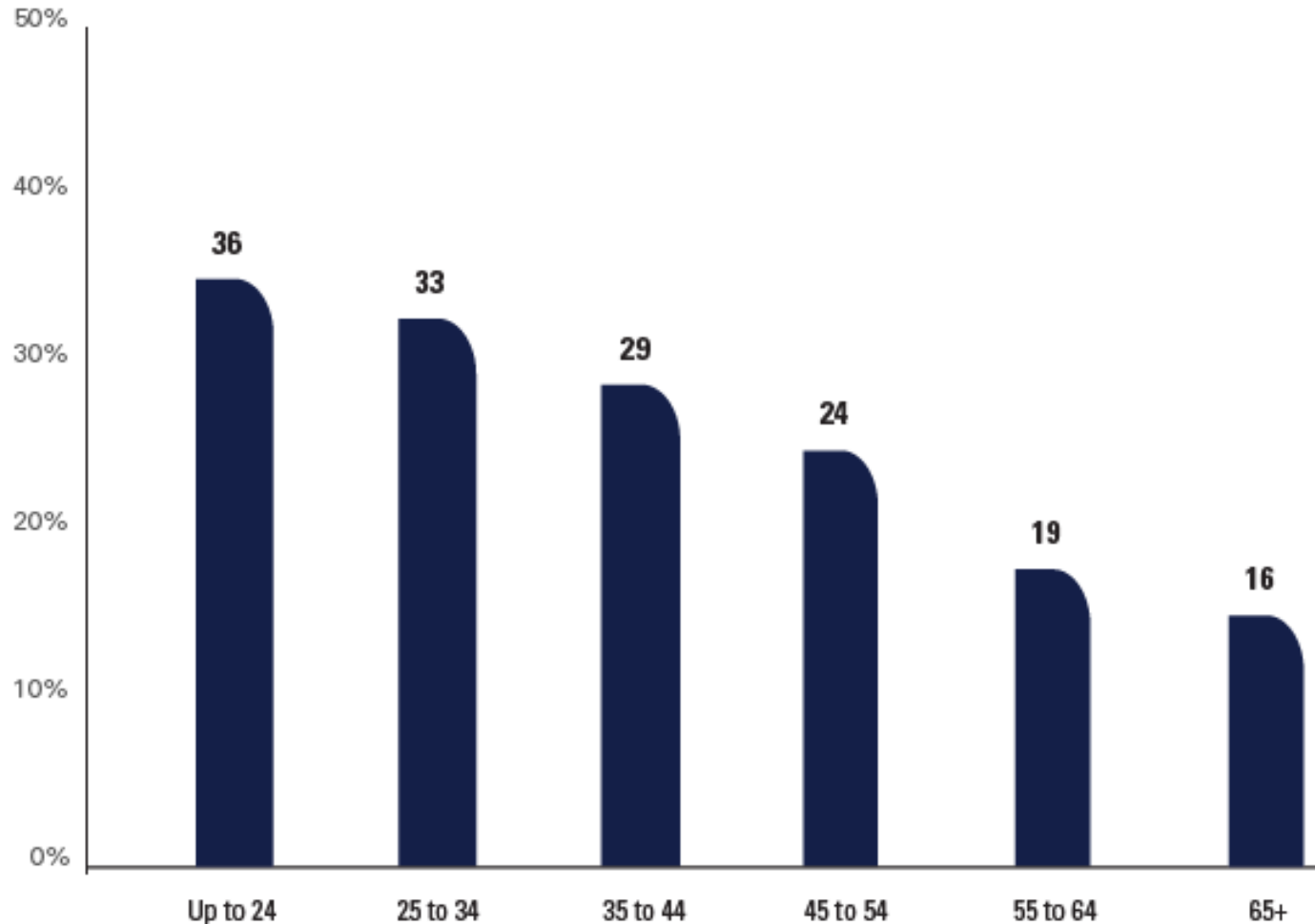
Others in CSA

Global



# Festivalization – hype or trend?

% AGREE WITH TRADE SHOWS SHOULD BE MORE LIKE FESTIVALS BY AGE



“ ”

You have to know your industry to understand what content they need. That could look like seminars, it could look like networking, it could look like an award ceremony, it could look like a great, fun party, but it really just depends from show to show.

Organiser

**How big is the European exhibition industry?**

**How do we compare to the rest of the world?**

**What are the challenges for the exhibition industry in Europe?**

**What opportunities are there for Poland?**



Rank ▲	Name	2019 Population	GDP (IMF '19)	GDP (UN '16)	GDP Per Capita	☰
1	United States	329,064,917	21.41 trillion	18.62 trillion	\$65,064	
2	China	1,433,783,686	15.54 trillion	11.22 trillion	\$10,841	
3	Japan	126,860,301	5.36 trillion	4.94 trillion	\$42,269	
4	Germany	83,517,045	4.42 trillion	3.48 trillion	\$52,885	
5	India	1,366,417,754	3.16 trillion	2.26 trillion	\$2,309	
6	France	65,129,728	3.06 trillion	2.47 trillion	\$46,984	
7	United Kingdom	67,530,172	3.02 trillion	2.65 trillion	\$44,759	
8	Italy	60,550,075	2.26 trillion	1.86 trillion	\$37,349	
9	Brazil	211,049,527	2.26 trillion	1.80 trillion	\$10,693	
10	Canada	37,411,047	1.91 trillion	1.53 trillion	\$51,015	
11	South Korea	51,225,308	1.78 trillion	1.41 trillion	\$34,703	
12	Russia	145,872,256	1.75 trillion	1.25 trillion	\$12,026	
13	Spain	46,736,776	1.58 trillion	1.24 trillion	\$33,889	
14	Australia	25,203,198	1.58 trillion	1.30 trillion	\$62,765	
15	Mexico	127,575,529	1.29 trillion	1.08 trillion	\$10,073	
16	Indonesia	270,625,568	1.15 trillion	932.26 billion	\$4,260	
17	Netherlands	17,097,130	994.77 billion	777.23 billion	\$58,184	
18	Turkey	83,429,615	961.65 billion	863.71 billion	\$11,527	
19	Switzerland	8,591,365	779.33 billion	668.85 billion	\$90,710	
20	Saudi Arabia	34,268,528	759.22 billion	639.62 billion	\$22,155	
21	Argentina	44,780,677	659.69 billion	545.87 billion	\$14,732	
22	Poland	37,887,768	649.97 billion	471.40 billion	\$17,155	
23	Sweden	10,036,379	628.80 billion	514.48 billion	\$62,652	
24	Taiwan	23,773,876	620.60 billion		\$26,104	
25	Belgium	11,539,328	587.70 billion	467.96 billion	\$50,930	

Rank ▲	Name	2019 Population	GDP (IMF '19)	GDP (UN '16)	GDP Per Capita
1	<a href="#">Germany</a>	83,517,045	4.42 trillion	3.48 trillion	\$52,885
2	<a href="#">France</a>	65,129,728	3.06 trillion	2.47 trillion	\$46,984
3	<a href="#">United Kingdom</a>	67,530,172	3.02 trillion	2.65 trillion	\$44,759
4	<a href="#">Italy</a>	60,550,075	2.26 trillion	1.86 trillion	\$37,349
5	<a href="#">Russia</a>	145,872,256	1.75 trillion	1.25 trillion	\$12,026
6	<a href="#">Spain</a>	46,736,776	1.58 trillion	1.24 trillion	\$33,889
7	<a href="#">Netherlands</a>	17,097,130	994.77 billion	777.23 billion	\$58,184
8	<a href="#">Turkey</a>	83,429,615	961.65 billion	863.71 billion	\$11,527
9	<a href="#">Switzerland</a>	8,591,365	779.33 billion	668.85 billion	\$90,710
10	<a href="#">Poland</a>	37,887,768	649.97 billion	471.40 billion	\$17,155

# 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



Southern Africa



ASSOCIATION  
OF EVENT  
ORGANISERS

United Kingdom



AFIDA

Central &  
South America



Mexico



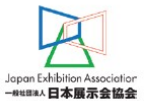
Indonesia



Australia



India



Japan



Macau

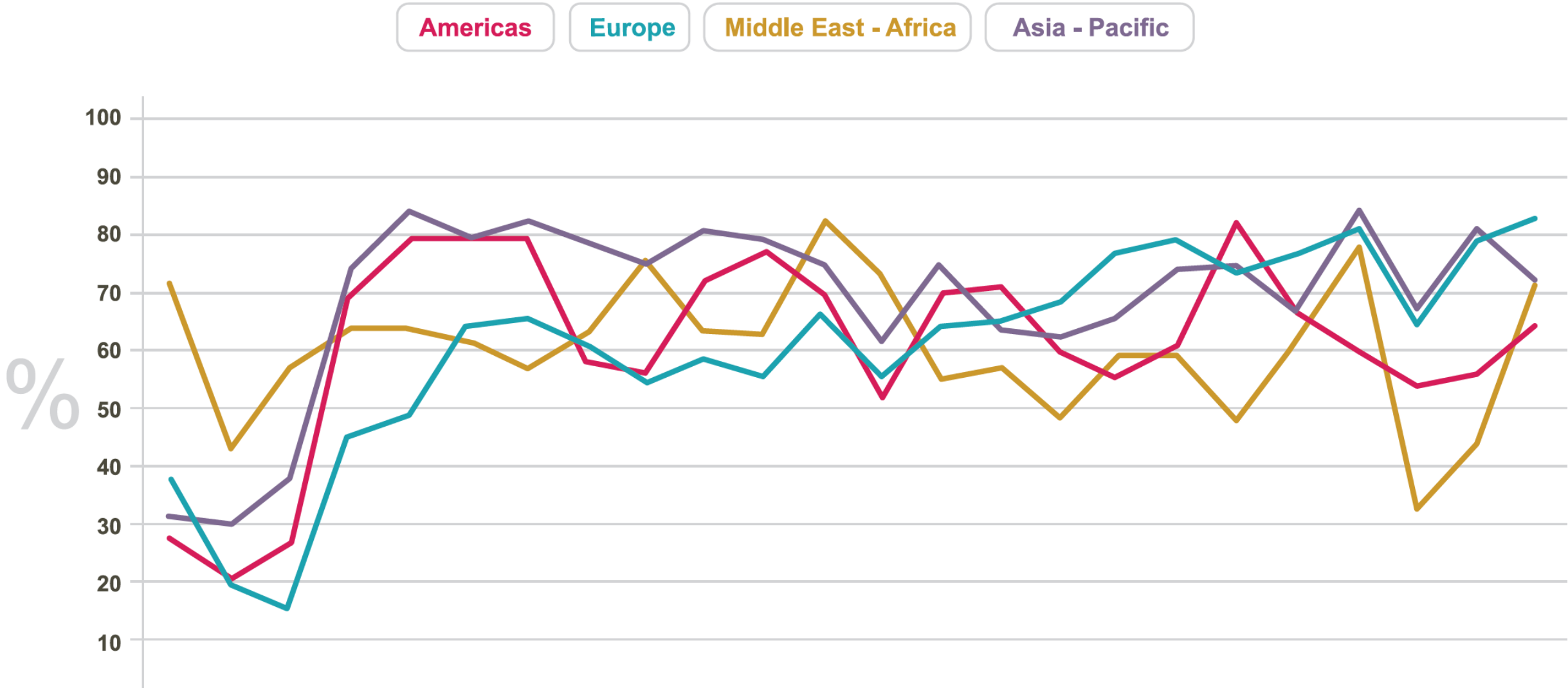


Russia





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



# Stability

---

At high point of the 2008 financial crisis,  
the GDP for the EU dropped 4.5%

**Poland grew by 1.6%**

# Export success story

1990	\$14 bn
2003	\$54 bn
2018	\$260 bn

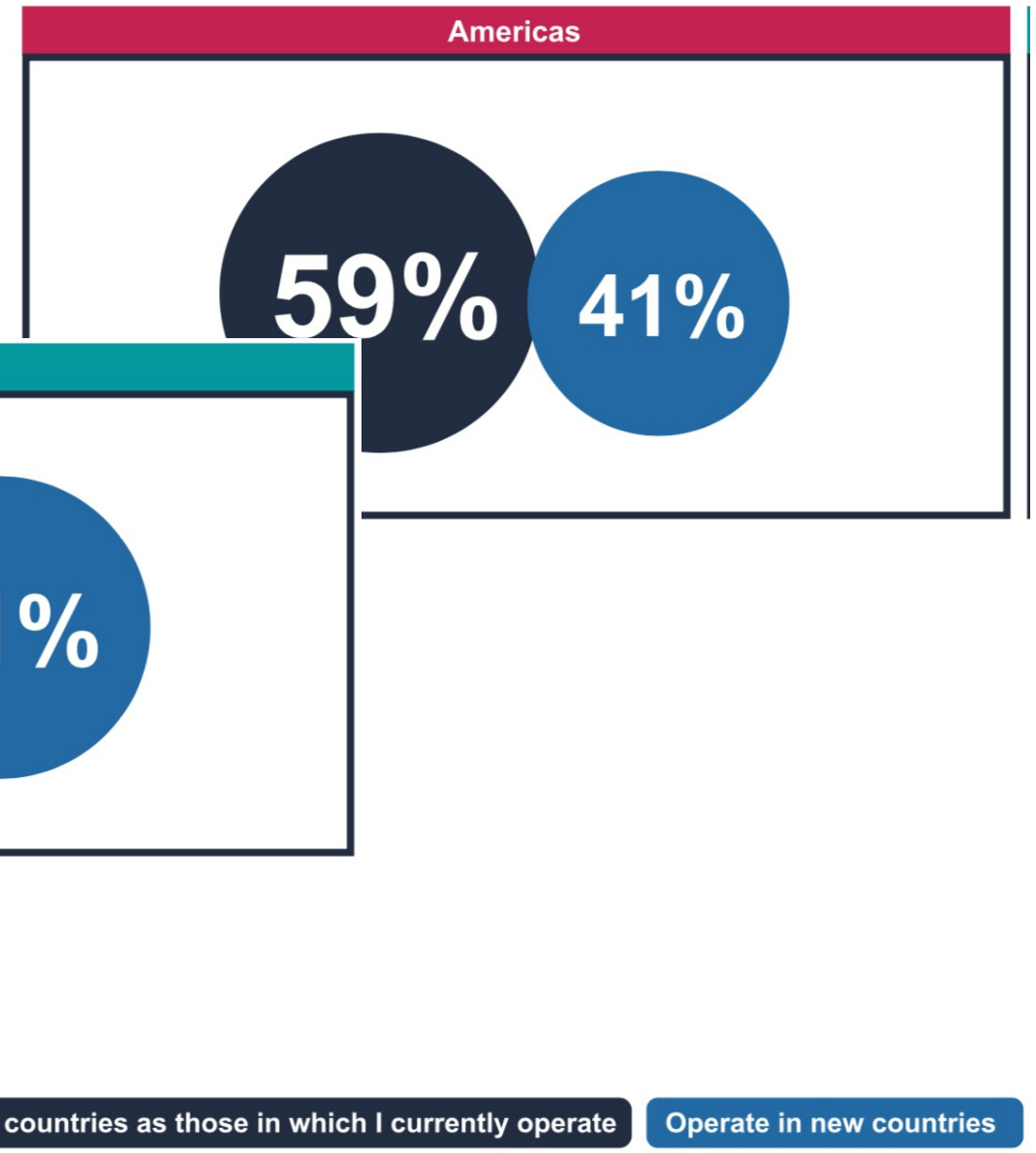


**10% growth p.a. // 15 x growth**

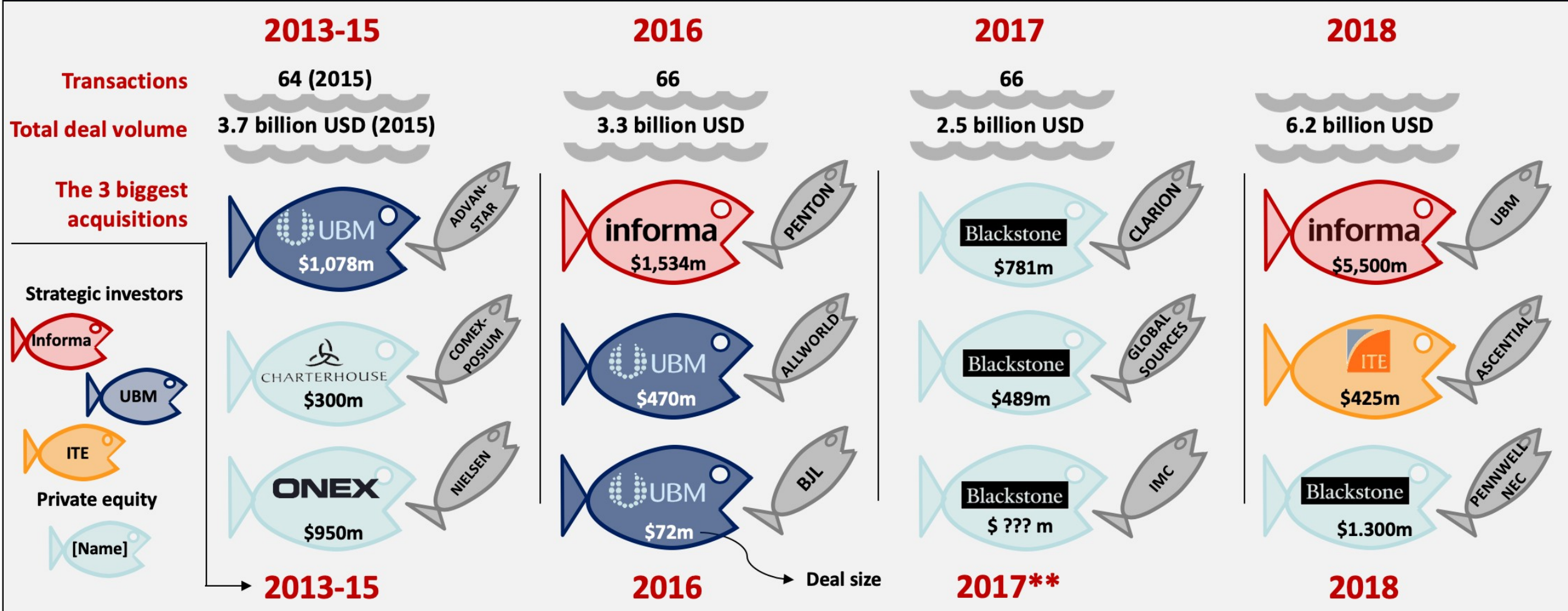


# UFI Global Exhibition Barometer

 **ufi** The Global Association of the Exhibition Industry  
**22<sup>nd</sup> Edition**  
Report based on the results of a survey concluded in January 2019



## Major acquisitions over the last years in the exhibition industry









---

**Technology**  
**Fashion**  
**Multimedia**  
**Design**

**Textile**  
**Transport / Marine**  
**Agriculture**  
**Manufacturing**

# UFI members in Poland





# Dobje! Thank you!

**Nick Dugdale-Moore**  
Regional Manager Europe  
[nick@ufi.org](mailto:nick@ufi.org)  [nickdmufi](https://twitter.com/nickdmufi)