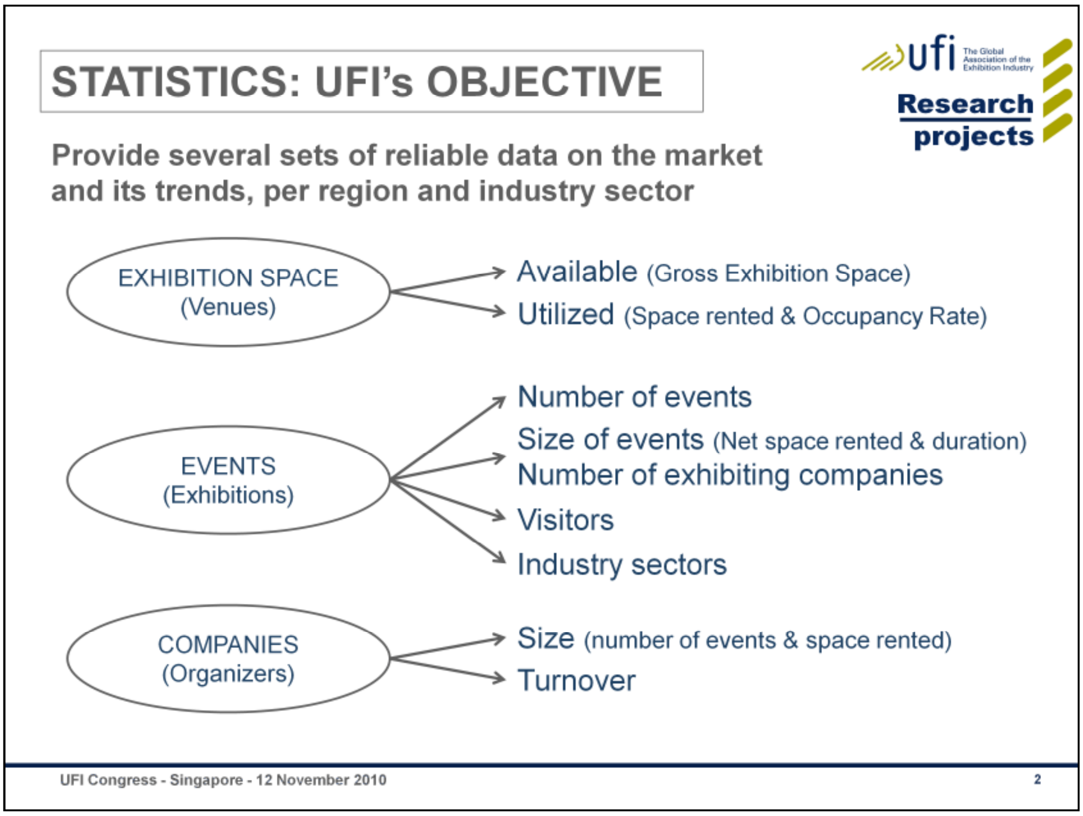
Global Exhibition Industry Statistics

Research projects

Presented
by John SHAW

UFI President 2009

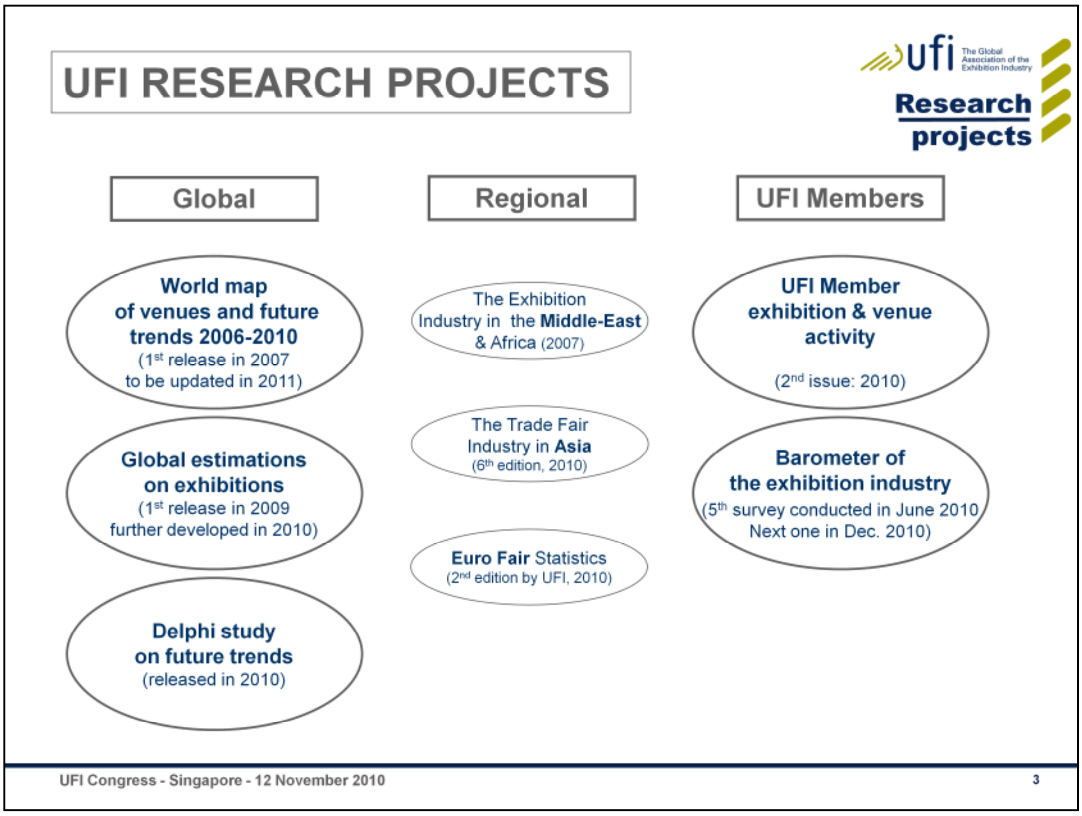


UFI's objective is to provide reliable data on the exhibition market to its Members and to all those interested in Exhibitions.

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 be able to provide you 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 sample of companies at both venue and organizer levels.

CURRENT RESULTS

Just released!

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1. Exhibition space available

- World Map 2006 & forecasts 2010 (as projected in 2007)
- Specifics on UFI Venues: trends 2006-2012

2. Global estimates on Exhibitions

- Number of events, space rented, number of exhibitors and visitors
- Specifics on UFI Exhibitions: trends 2006-2009

3. Companies

- Specifics on UFI Member Organizers: size, internationality and trends 2006-2009
- All companies: Turnover and Operating Profit (Barometer)

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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 on the occasion of this 77th Congress.

1. EXHIBITION SPACE AVAILABLE GLOBALLY

(source: World Map of Venues – October 2007)

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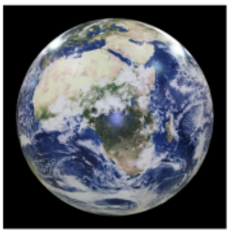


In 2006

- **1,062 venues** (with a minimum of 5,000 sqm indoor exhibition space) identified worldwide
- Total gross **indoor** exhibition space: **27.6 million sqm**

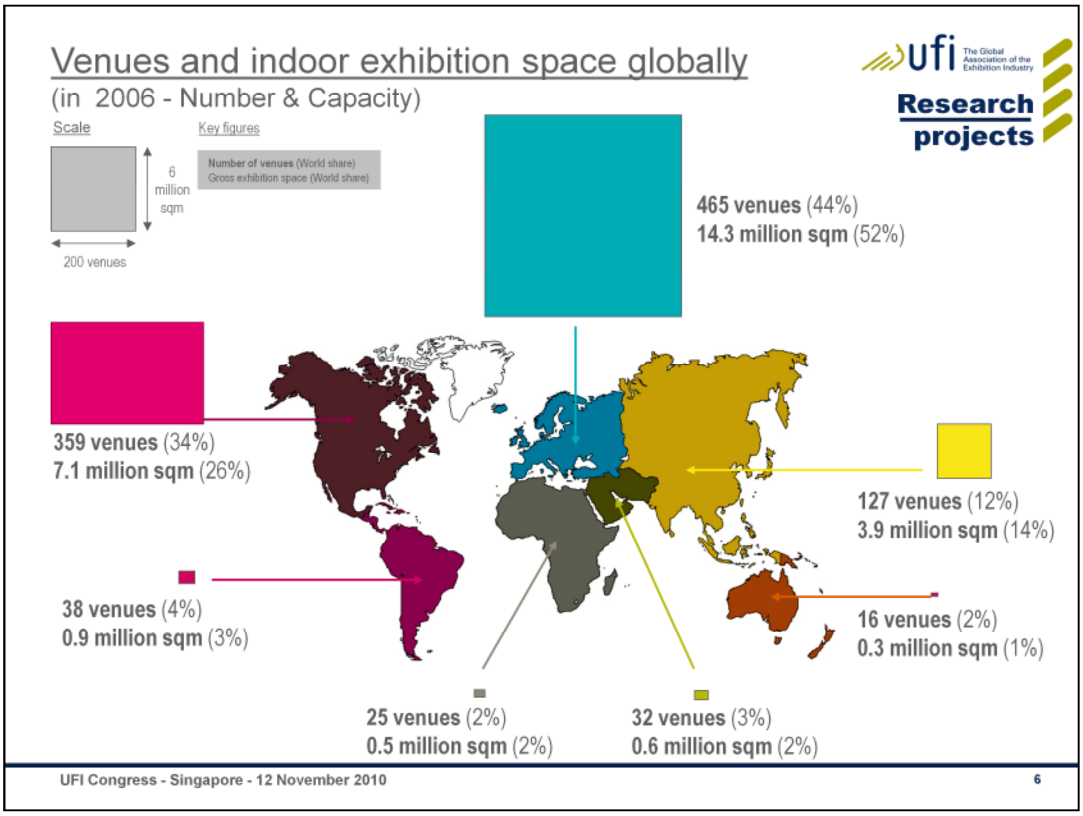
Projected for 2010

- **1,104 venues**, including: 14 venues with less than 5,000 sqm in 2006
  30 new venues
  1, closed in 2006, will be reopened
  3, operating in 2006, will be closed
- Total gross **indoor** exhibition space: **31.1 million sqm (+13%)**

So first, the capacity side of our industry.

You are probably all familiar with these figures which identified the number of exhibition venues (with a minimum of 5000 sqm) in 2006 and the projected figure for 2010, as anticipated in 2007.

To illustrate this world venue capacity, we can compare it to a square of roughly 5.5 km by 5.5 km.

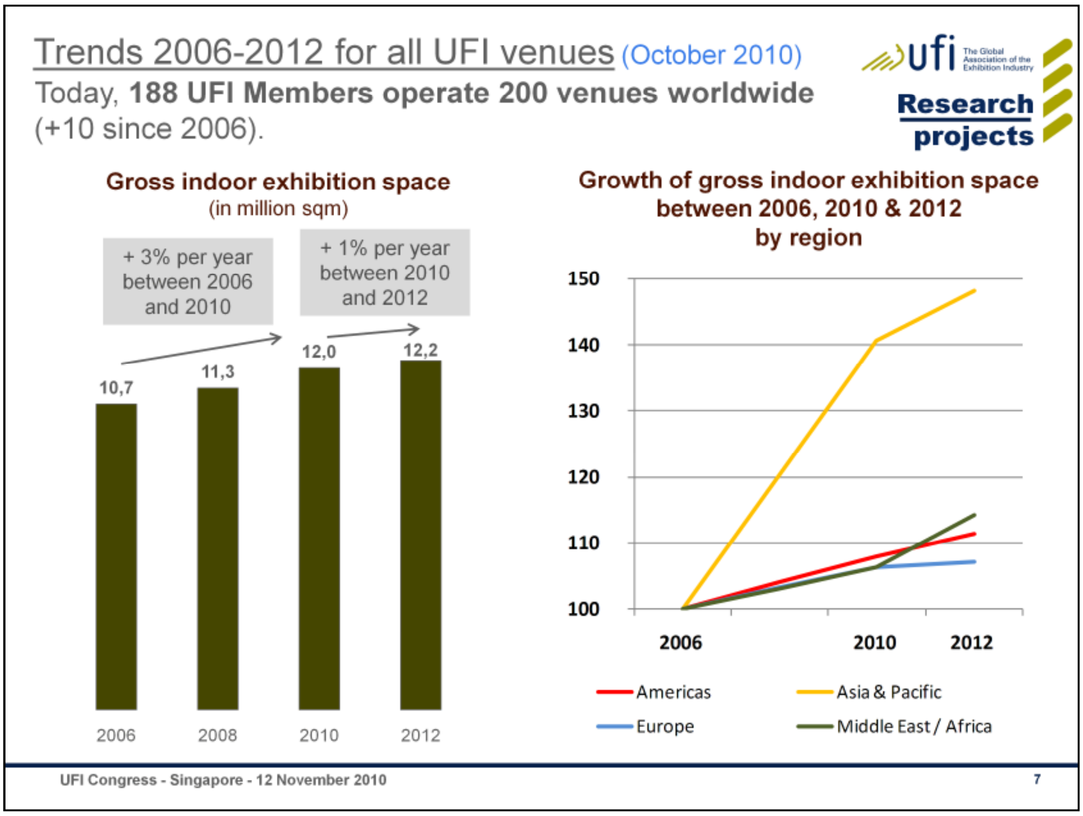


This is where world stood at the end of 2006.

Each region is represented on this map with a rectangle, whose dimensions are determined by the number of venues horizontally, and the indoor exhibition space vertically.

EUROPE and then NORTH AMERICA & ASIA came largely ahead, both in terms of number of venues and exhibition space.

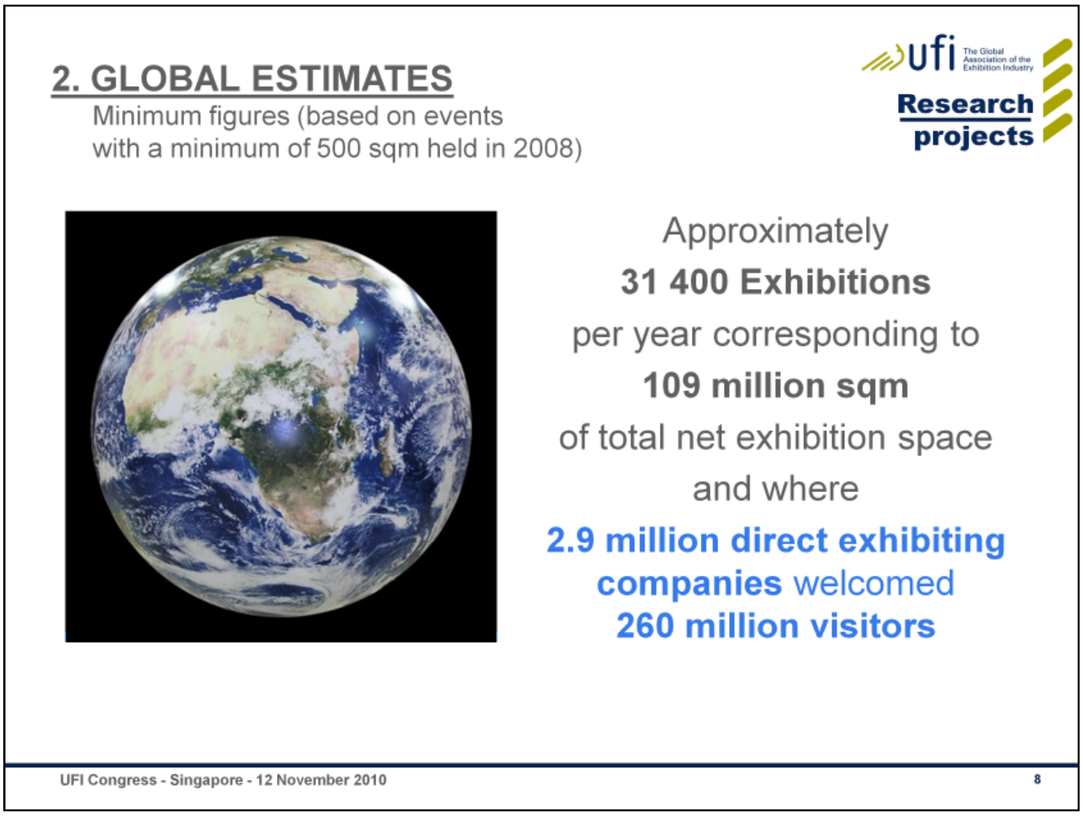
We plan to update this map in 2011, but in the meantime, we have looked at how UFI venues had changed during that 2006-2010 period, and also at what is planned by 2012.



Today, our 188 UFI Members who operate venues manage 200 venues. That is 10 more than in 2006 and 1 more is planned for 2012.

UFI venues total exhibition space has grown by around 3% a year in the 2006-2010 period. It is anticipated that this rate will slow down to a 1% annual increase during the 2010-2012 period.

The different regional trends are interesting to notice. UFI member venue capacity in Asia / Pacific increased by almost 50% since 2006, whereas all other regions increased by only10%.



If we move to the EVENT side of the exhibition industry.

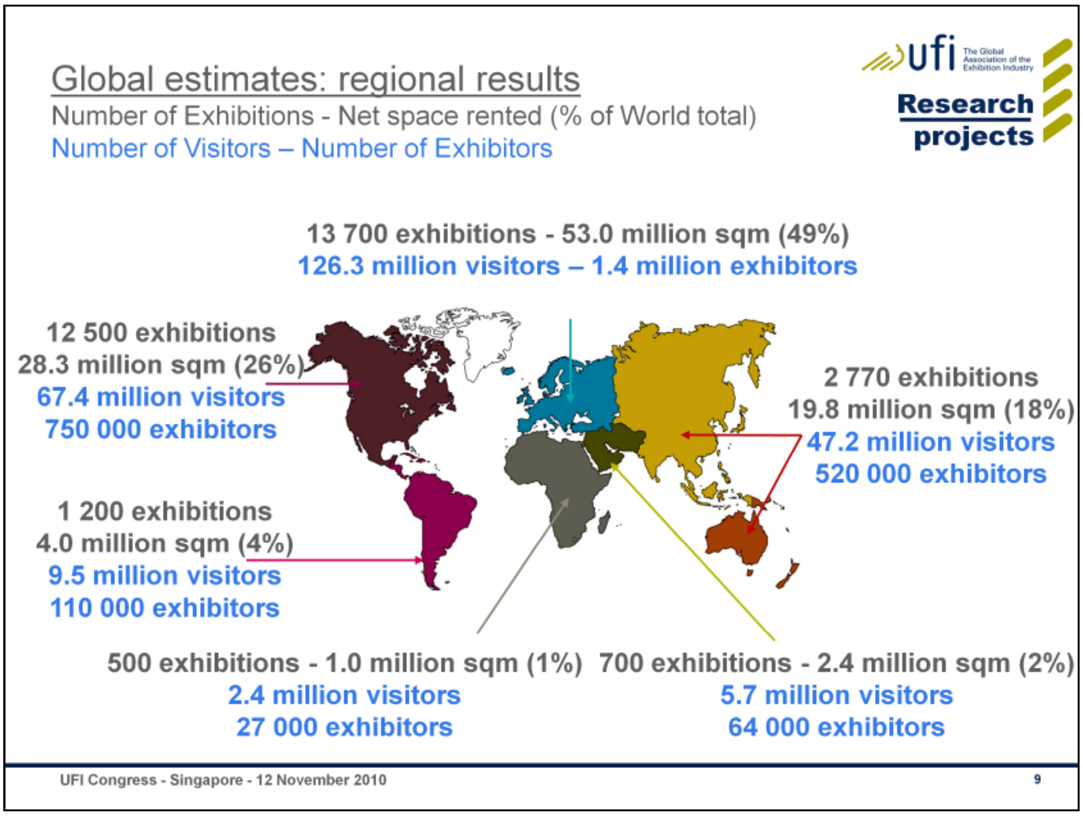
In 2009, UFI released global estimates on the number of events, and the size of the exhibition market in terms of net rented exhibition space.

We are now adding data related to the total number of Exhibitors and Visitors.

Thee figures should be considered as the minimum, as we only considered:

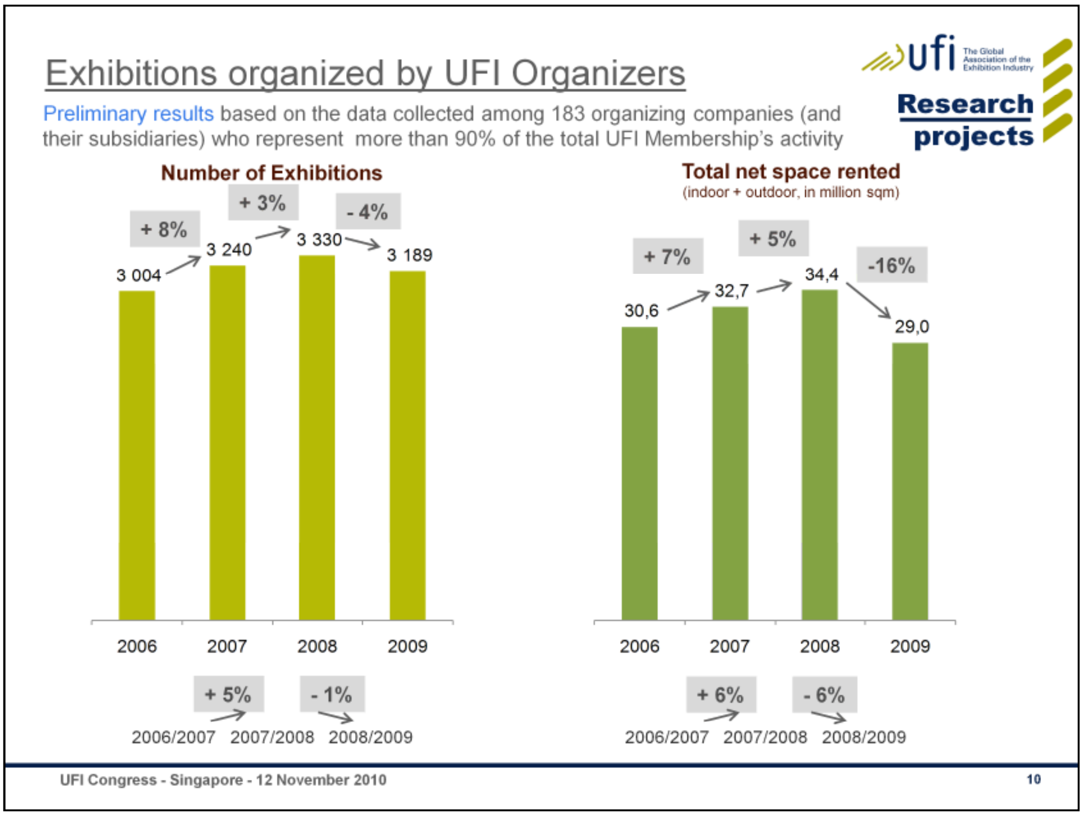
- events with a minimum of 500 sqm of net exhibition space

- *direct* exhibitors.



Here is the breakdown by region.

The next slide will show you the trend for UFI organizers during the 2006-2009 period.

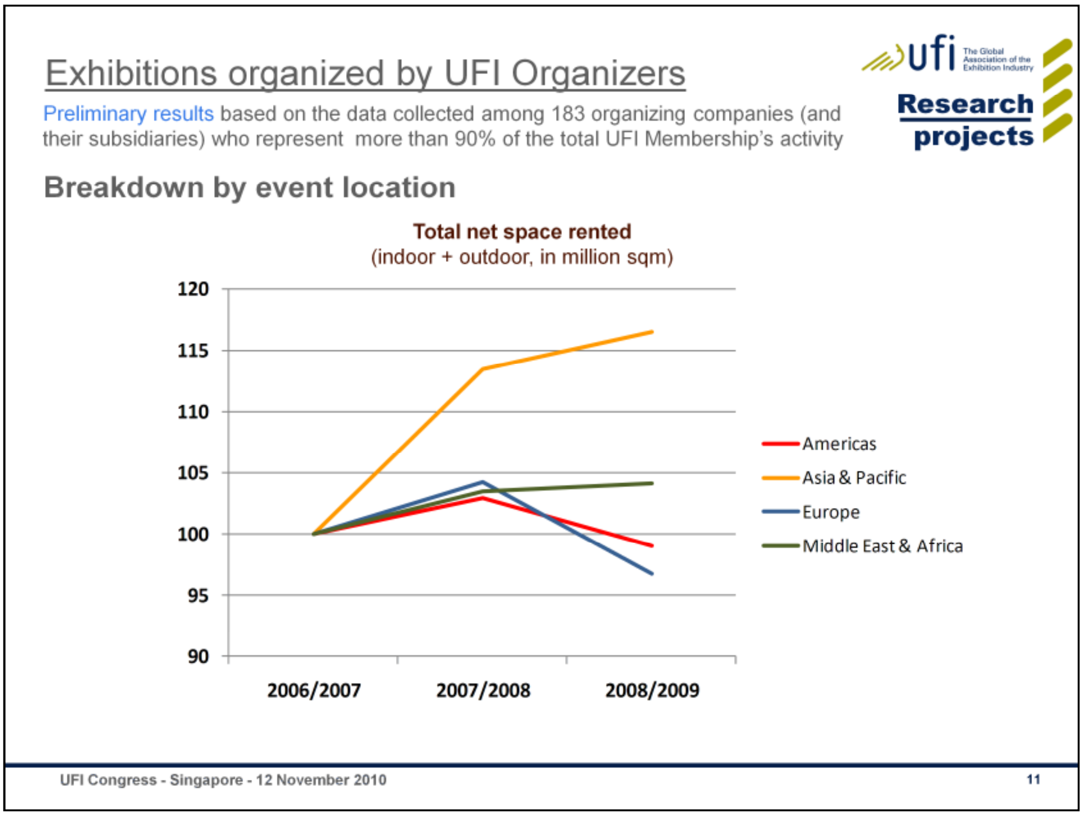


These results are preliminary as they relate only to 183 UFI Members, and their subsidiaries. This represents 90% of the total UFI Member activity.

These charts consolidate the data from more than 12,000 exhibitions and as you can see the positive trend on the 2006-2008 period ended in 2009.

Within this large scale sample, one should, however, consider data on a 2 year cycle basis to better assess trends, as many events are biennial. For some reason, even years are, in many countries, stronger than odd years.

As you can see (on the right bottom corner) the progression of 2007/2008 when compared to 2006/2007 has been neutralized by the drop measured in 2008/2009. As a result we can say that the 2008/2009 level of activity is equivalent to the one in 2006/2007.



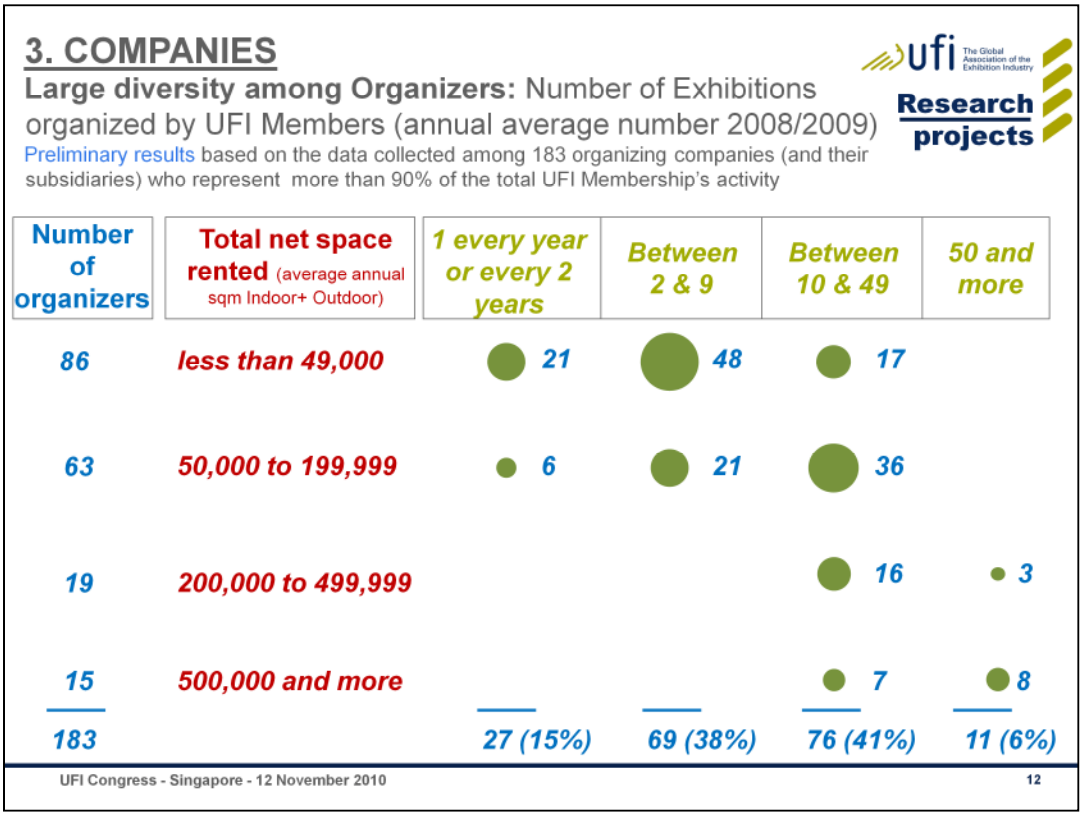
However, not all regions showed the same level of performance.

As you can see in this chart:

- the volume of exhibition activity in Asia / Pacific has increased by more than 15%;

- the volume of activity in Europe and the Americas decreased slightly .

-the activity in the MEA increased slightly .



Company analysis:

This chart outlines the diversity of UFI Member organizers:

-on one side, 86 companies rent up to 50 000 sqm of exhibition space in total on a yearly basis, and on the other side 15 rent more than 500 000 sqm

- in terms of the number of exhibitions organized, 15% of UFI Members (27) organize only one event every year or every 2 years; and 6% (11) organize more than 50 a year.

Internationalization: Nr. of countries & regions covered by UFI Organizers (annual average number for 2008 & 2009)

Preliminary results based on the data collected among 183 organizing companies (and their subsidiaries) who represent more than 90% of the total UFI Membership's activity

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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
86	less than 49,000	74	10	1	1
63	50,000 to 199,999	45	9	6	3
19	200,000 to 499,999	11	3	3	2
15	500,000 and more	2		4	9
183		132 (72%)	22 (12%)	14 (8%)	15 (8%)

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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 (=all) regions.

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

Market share & Growth rate (total space rented by UFI Organizers between 2006/2007 & 2008/2009)

Preliminary results based on the data collected among 183 organizing companies (and their subsidiaries) who represent more than 90% of the total UFI Membership's activity

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Number of organizers	**Total net space rented** (average annual sqm 2008/2009)	**Market share** (space rented in 2008/2009)	**Growth rate** (since 2006/2007)
86	*less than 49,000*	*6%*	***- 7%***
63	*50,000 to 199,999*	*21%*	***- 4%***
19	*200,000 to 499,999*	*18%*	***+ 5%***
15	*500,000 and more*	*55%*	***+ 1%***
183		*100%*	***+ 0.1%***

This slides indicates that, on average, the "large" companies performed better, over the past several years, than did the smaller ones.

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Global Exhibition Barometer

- Survey conducted among UFI, SISO (USA) & AFIDA (Central and South America) Members
- 5th survey was conducted in June 2010
- 6th survey conducted next month

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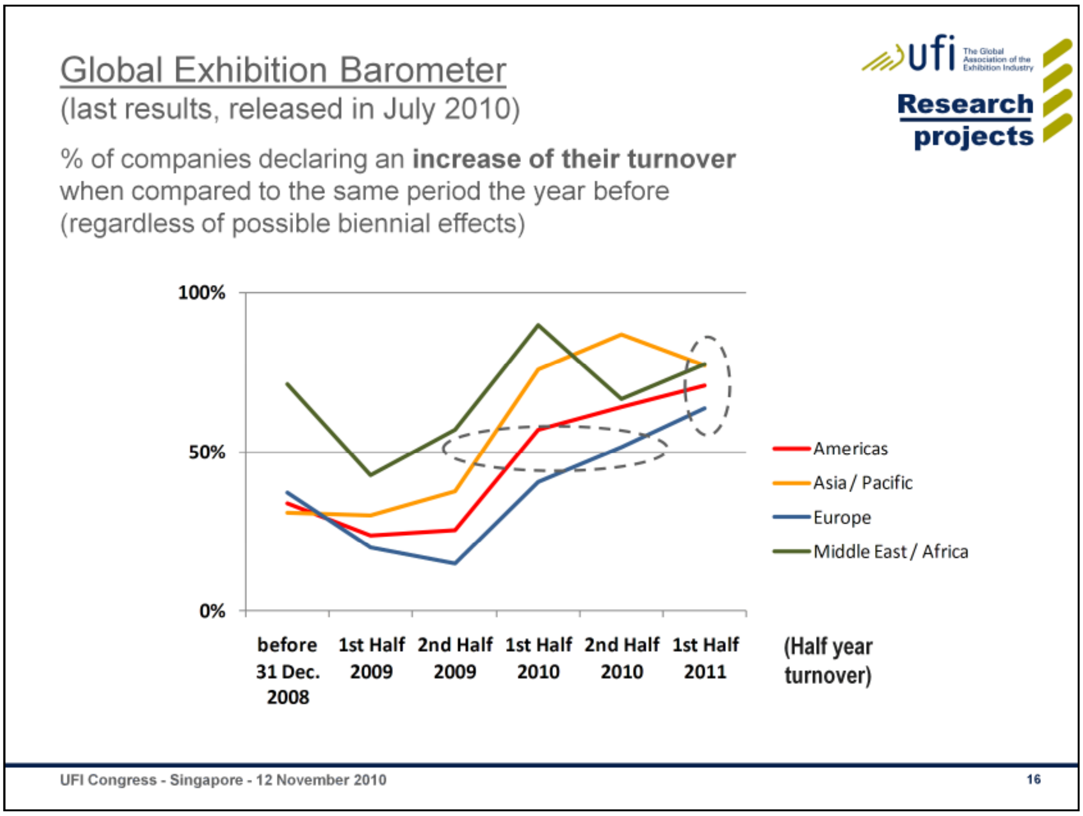
The final part of this presentation relates to the forecast outlined in the UFI Global Exhibition Barometer, implemented in early 2009 in liaison with SISO and AFIDA for North & South America.

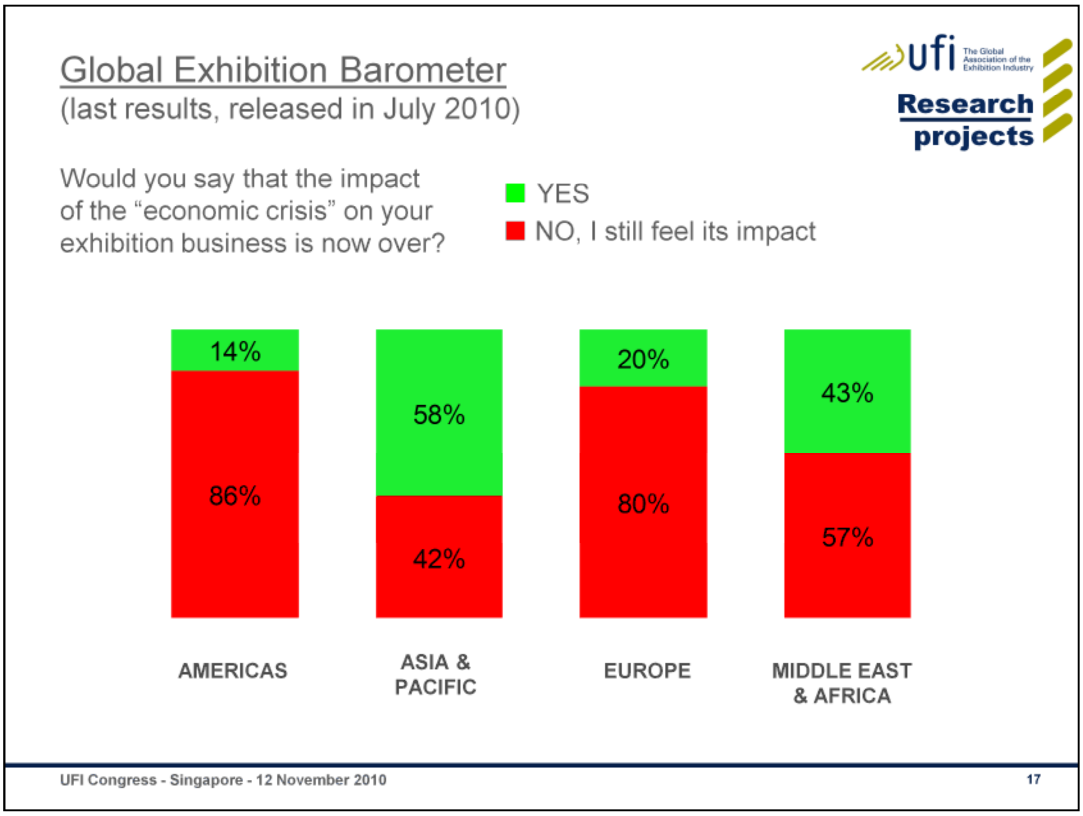


Two slides have been selected from the report. The first one concerns TURNOVER. It outlines the % of respondents who have declared an increase for each half year from the end of 2008 to mid 2011. Here again there are significant regional differences.

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 (FIRST DASHED CIRCLE), the time when a majority of companies declared an increase in turnover ranges from the 2nd half of 2009 for AP to the 2nd half of 2010 for EUROPE.

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

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THANK YOU!

This presentation is downloadable at www.ufi.org « Survey & Studies » section

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