

UFI Global Exhibition Barometer

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

19th Edition

Report based on the results of a survey concluded in July 2017



Global



Southern Africa



United Kingdom



Central & South America



Mexico



India



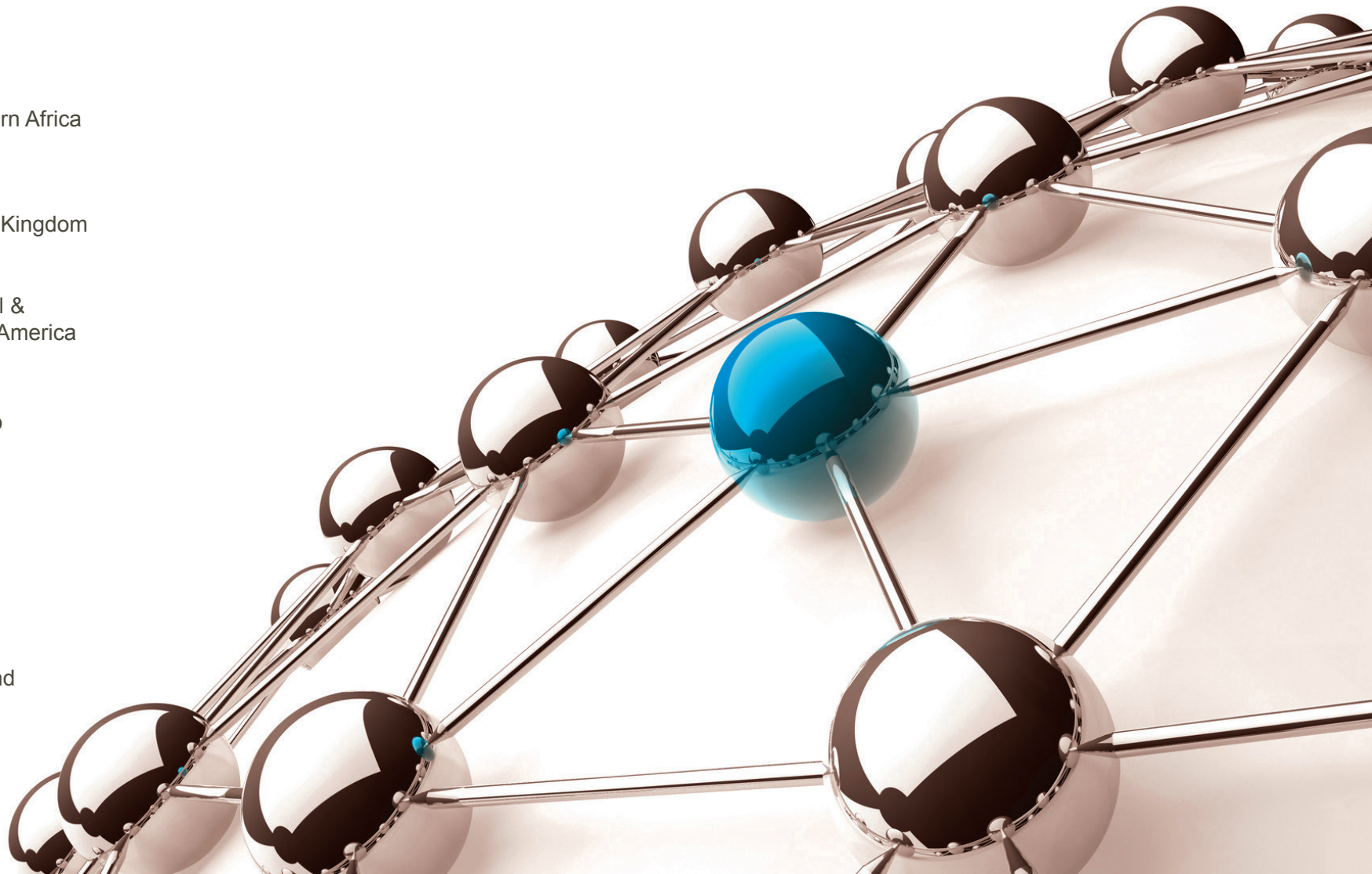
US



Thailand



Brazil



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Welcome to the 19th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, concluded in July 2017. It represents up to date information on the development and the outlook of the global exhibition industry as well as on 14 specific countries and zones.

UFI began assessing the impact of the global economic conditions on the exhibition industry twice a year in 2009. In 2010, this semi-annual survey became the “UFI Global Exhibition Barometer”. For the United States, this survey includes Members of SISO (Society of Independent Show Organizers) and the scope of the Research has since been broadened to include members of AEO (Association of Event Organisers, UK), AFIDA (Asociación Internacional de Ferias de América), AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones), AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, TEA (Thai Exhibition Association) and UBRAFE (União Brasileira dos Promotores Feiras) in Central and South America. IEIA (Indian Exhibition Industry Association) joined the research as from this last survey.

Important remarks

It should be noted that the number of replies to the current survey (257 from 56 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 14 countries or zones where a significant number of answers were obtained are included.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at chris@ufi.org.

This research is available online at www.ufi.org/research.

The 19th Barometer surveyed the evolution of participants' gross turnover expectations for the two halves of 2017 and the first half of 2018 compared to their turnover during the same period in the previous year (regardless of possible biennial effects).

The chart on the next page 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.

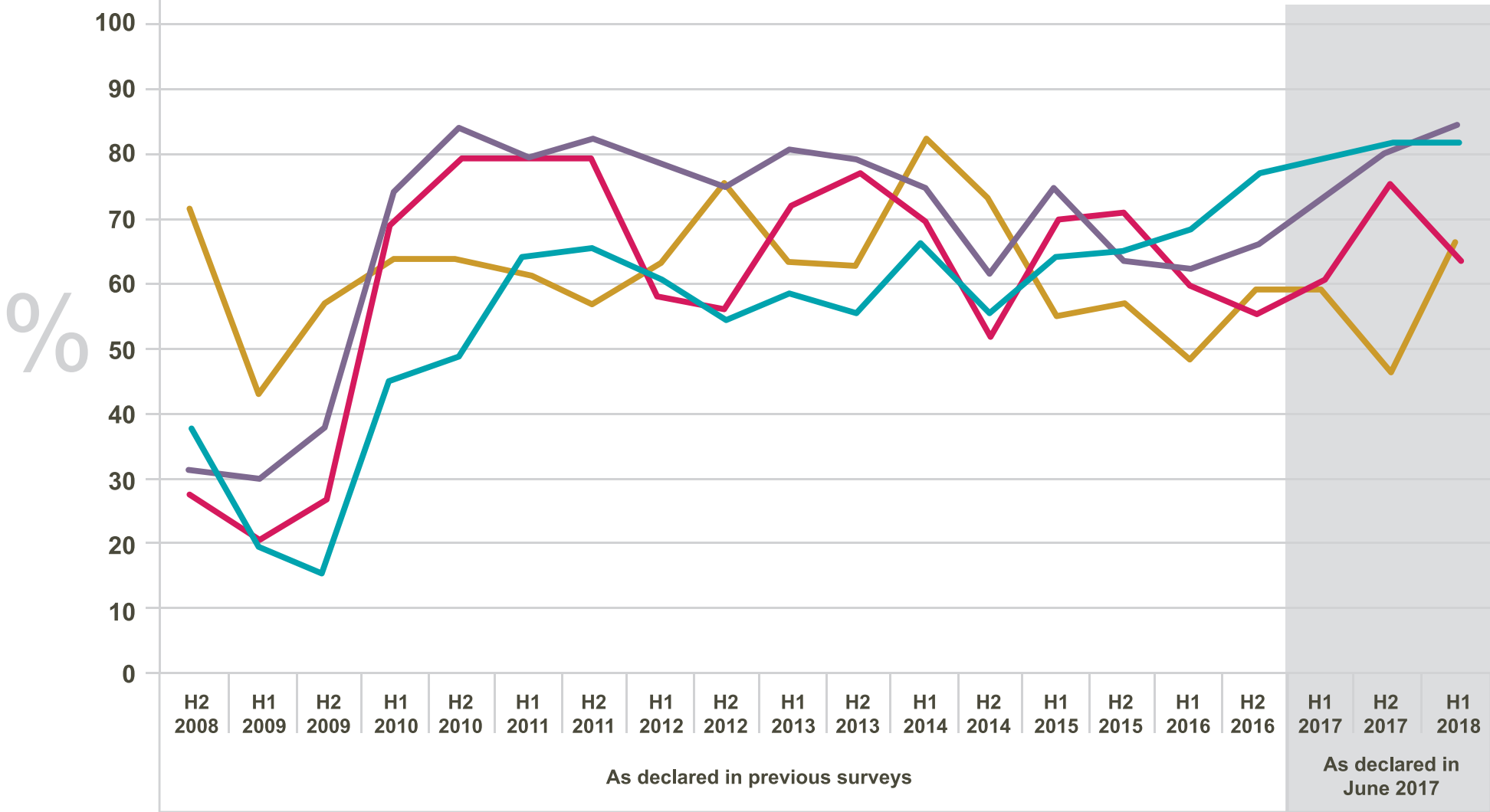
It shows a very positive outlook for Asia - Pacific and Europe, where at least 74% of respondents declare an increase for these periods. The levels registered for the Americas and the Middle East are a bit less positive and unstable, with an average of 66% for the Americas and a peak for the second half of 2017, and an average of 58% for Middle East – Africa and a drop in the second half of 2017).

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. They show a variety of situations:

- North America, the US and Mexico present an irregular trend with around 80% of companies declaring an increase for the second half of 2017, but only 55% for the halves before and after (and 33% only in Mexico for the first half of 2018);
- In Central and South America, the situation appears more stable over the period: 50 to 70% of companies in Brazil and 67% in the other countries declare an increase for the 3 periods
- In Europe, all four sub-markets analysed (Germany, Russia, UK and rest of Europe) present a very positive and stable situation declaring an increase of turnover from 70% (in Russia) to 83% (in the UK) on average over the period;
- In the Middle East, the first half of 2017 was rather flat (only 55% of companies declared an increase) but the next 2 halves indicate an improvement (between 64 and 67%);
- In South Africa, the situation appears to degrade, from 58% of companies declaring an increase for the first half of 2017, but only 32 and 50% for the next 2 halves;
- In Asia - Pacific, all four sub-markets analysed (China, India, Thailand and rest of the region) declare a very positive situation declaring an increase of turnover between 67 and 78% on average over the period. However, 2 exceptions related to the first half of 2018 for China and Thailand, where this levels drops to 57/59%, together with a significant share of “unknown” answers (35% in China).

% 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 19th Global Barometer survey questioned the evolution of operating profits for 2016 and 2017 compared to the previous year.

The chart presented on the following page 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 more stable result (between -10% and +10%) – see footnote.

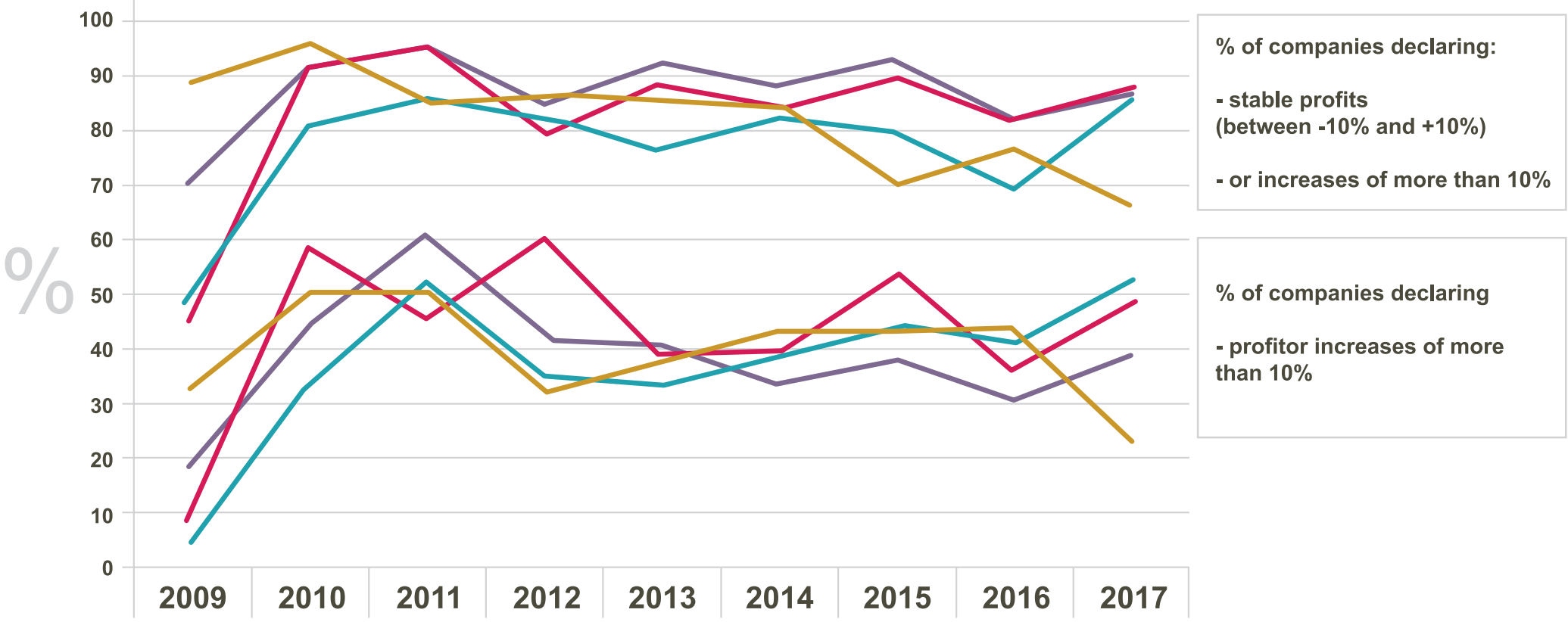
The detailed results show that most regions maintained a good level of performance in 2016, even though it was generally lower than the level recorded in 2015. Profits for 2017 appear to be on the rise in most regions, except in the Middle East and Africa.

- **In the Americas, all four sub-markets indicate a stable or improving trend between 2016 and 2017 in terms of companies declaring an increase of more than 10% in annual profits: from 29% for 2016 to 62% for 2017 in the US; 45%/42% in Mexico; 30%/46% in Brazil and from 25%/33% for the other markets in Central and South America;**
- **In Europe the situation appears more contrasted:**
 - o **in Germany and the UK, the high levels recorded for 2016 are anticipated to drop for 2017: from 72% of companies declaring an increase of more than 10% in annual profits for 2016 to 54% for 2017 in Germany and from 80% to 44% in the UK, based on the usual show cycles;**
 - o **in Russia and the rest of Europe, the situation was not as good for 2016 but it reaches the same levels as those anticipated in Germany or the UK for 2017: from 12% of companies declaring an increase of more than 10% in annual profits for 2016 to 45% for 2017 in Russia and from 40% to 50% in the rest of Europe;**
- **In both the Middle East and South Africa, the levels recorded for 2016 are anticipated to drop for 2017: from 55% of companies declaring an increase of more than 10% in annual profits for 2016 to 20% for 2017 in the Middle East and from 39% to 15% in South Africa;**
- **In Asia - Pacific, the lower levels of companies declaring an increase of more than 10% in annual profits for 2016, when compared to the other regions of the world are anticipated to remain flat for 2017 in China and India (between 28 and 35% for both years) and to improve in Thailand (from 33 to 60%) and the other markets of the region (from 23 to 46%).**

Footnote: The charts included in the second part of this report (“Detailed results for selected countries or zones”) detail these results, adding the percentage of companies with reductions in profits or losses.

Operating Profits compared to the previous year

Americas Europe Middle East - Africa Asia - Pacific



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. Multiples choices were proposed to get further insight for some answers.

As in previous surveys, around 80% of all answers relate to the following 4 issues:

- **“State of the economy in home market” (25% in the current survey, down 1% compared to 6 months ago);**
- **“Competition from within the industry” (21% in the current survey, up 1% compared to 6 months ago);**
- **“Global economic developments” (20% in the current survey, down 2% compared to 6 months ago);**
- **“Internal challenges” (15% in the current survey), up 2% compared to 6 months ago, where “Human resources” are named as the most important aspect.**

It can be noted that, compared to the results a year ago, **“Competition from within the industry”** climbs up by +4% and now ranks as the second most important issue.

“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 the same levels as in the last survey.

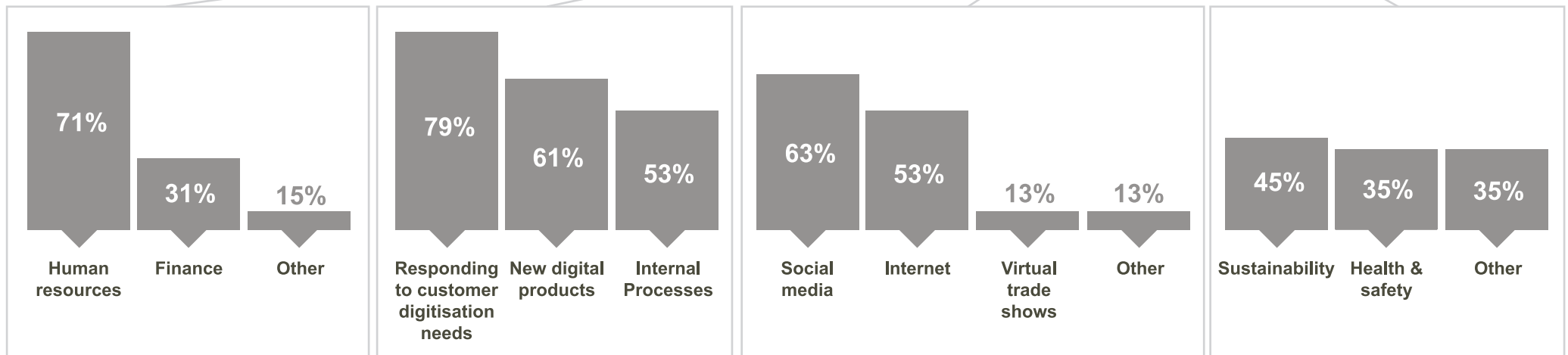
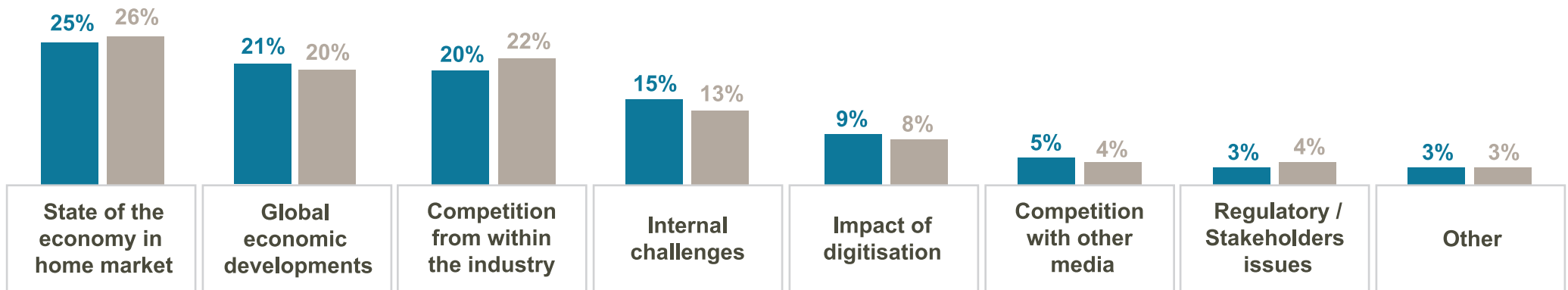
The next slide shows the consolidated global results, including further insights. The following page details those results by region and by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”). Results show some recent developments:

- **“Impact of digitisation” becomes the third most important business issue in Europe, and also receives more relevance from organisers or service providers than venues;**
- **“Competition from within the industry”, which is the third most important issue for organisers and service providers, but one of the last one for venues (for which “Internal challenges” are ranked higher).**

Top Issues: Global Results

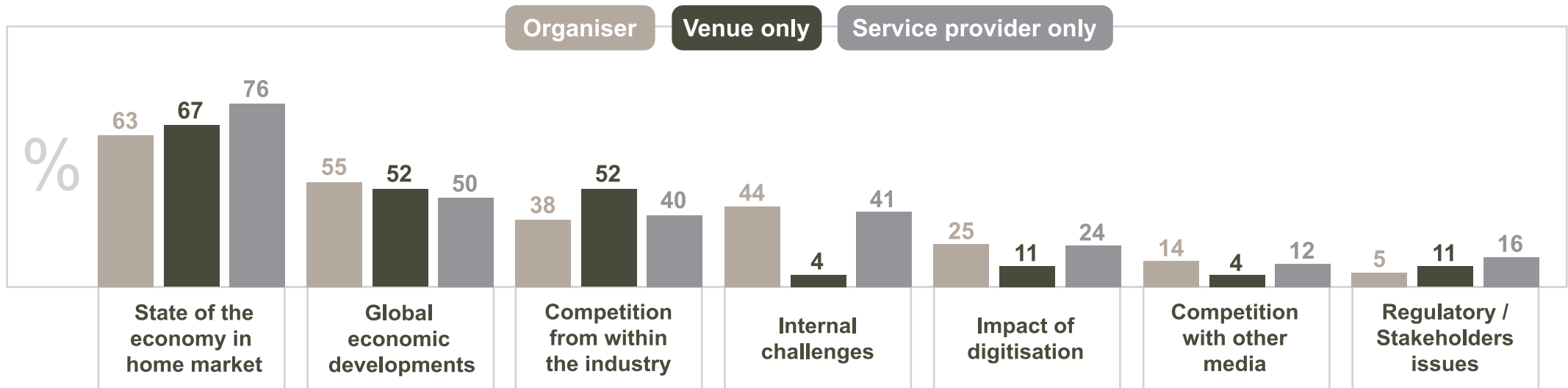
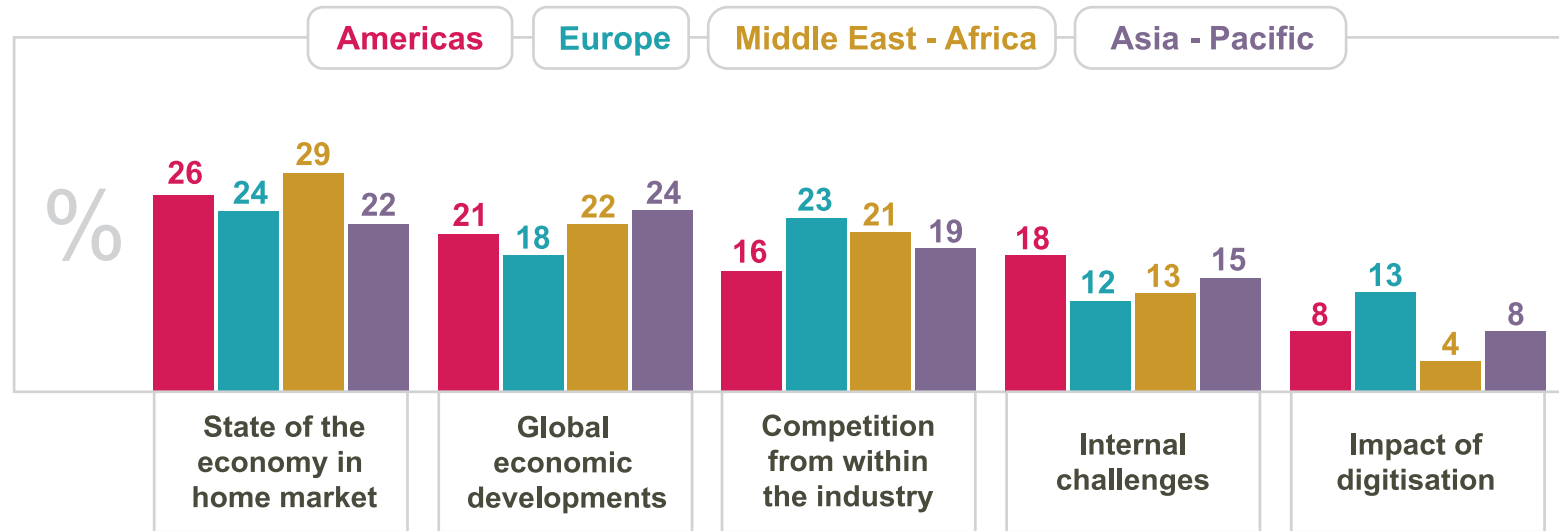
Results from current survey – July 2017

Results from last survey - January 2017



(multiple answers possible)

Most important issues: detail by region and type of activity for the five top issues identified globally

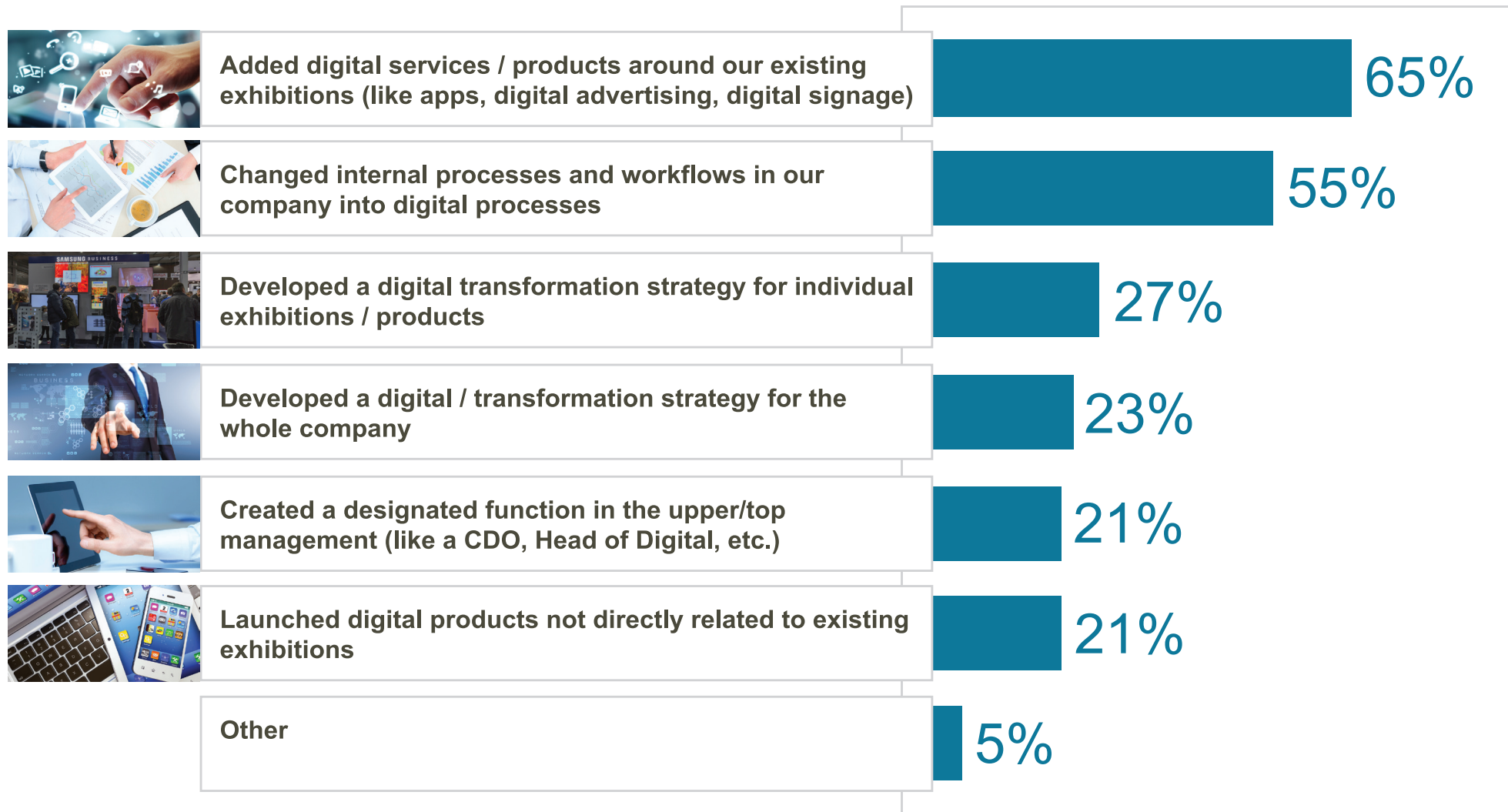


With digitisation accelerating in businesses around the world, this edition of the Global Barometer also focusses on the state of digital activity in the exhibition industry. Seven actions were proposed and the results show that the majority of companies have responded to the accelerating process of digitisation in the exhibition industry. The U.K., Germany, China, and the U.S. are identified as the exhibition markets who are currently most active in the digital transformation process.

- **Two out of three survey participants reported that they have added digital services/products (like apps, digital advertising, digital signage) around existing exhibitions. This is the norm already in Germany (100% of respondents), and is also widely established in Brazil (82%) as well as in the U.S., Russia, and Thailand (73% each);**
- **The companies in the exhibition industry are digitising themselves as well: Globally, 55% stated that they have changed internal processes and workflows to be more digital. The most advanced exhibition markets here are Thailand (73%), China (71%) and Germany (69%);**
- **One in four companies participating in the survey reported that they have developed a digital transformation strategy for the whole company, with Mexico (58%) and the U.S. (45%) leading;**

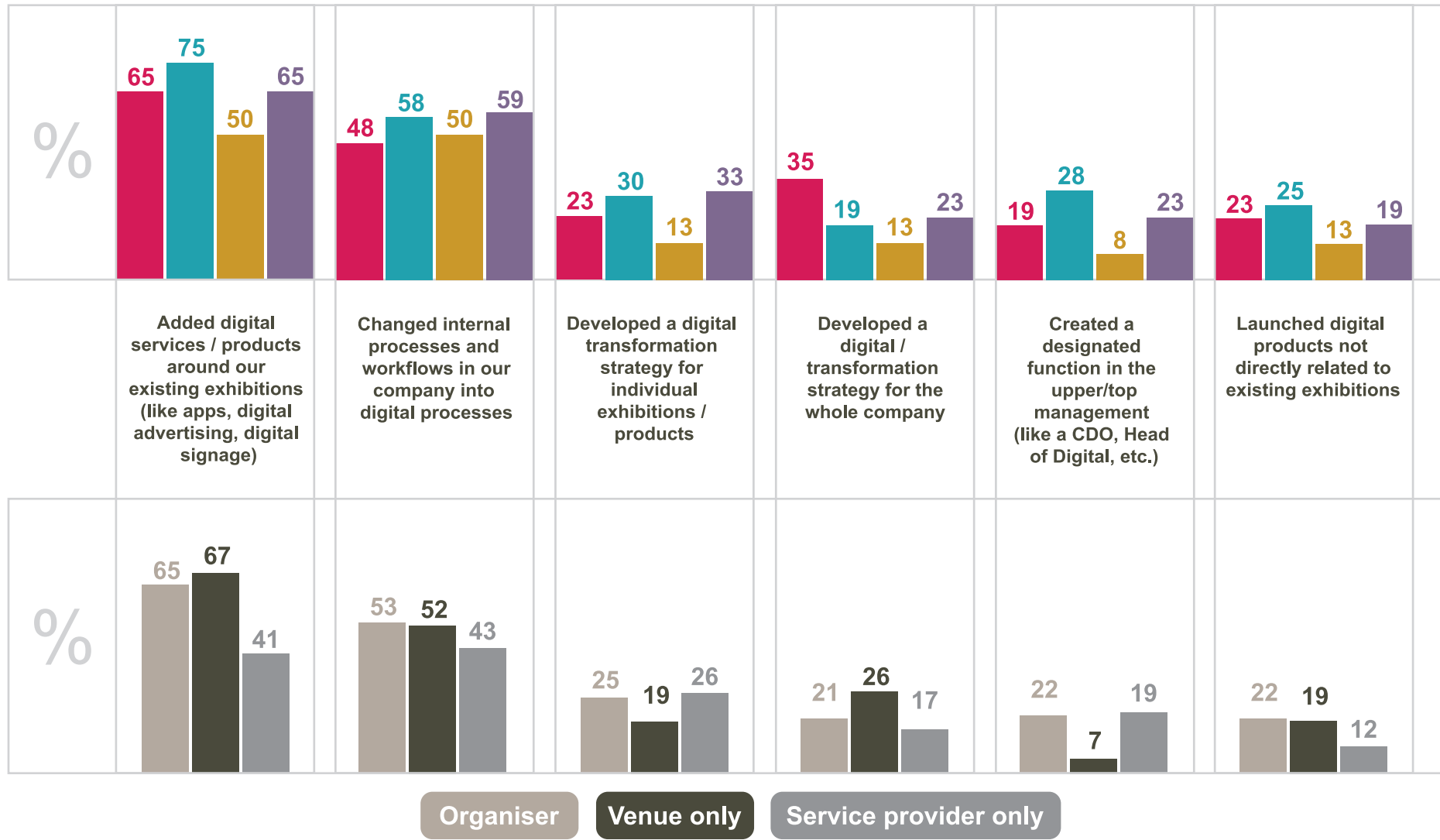
- **One in five companies has created a designated function (like a Chief Digital Officer) in the upper/top management – led here by China (33%) and Germany (31%);**
- **Finally, also one in five survey participants stated that they have launched digital products not directly related to existing exhibitions – a development especially visible in the U.K. (50%) and the U.S. (36%).**

The next slides show the global results, followed by detailed results.

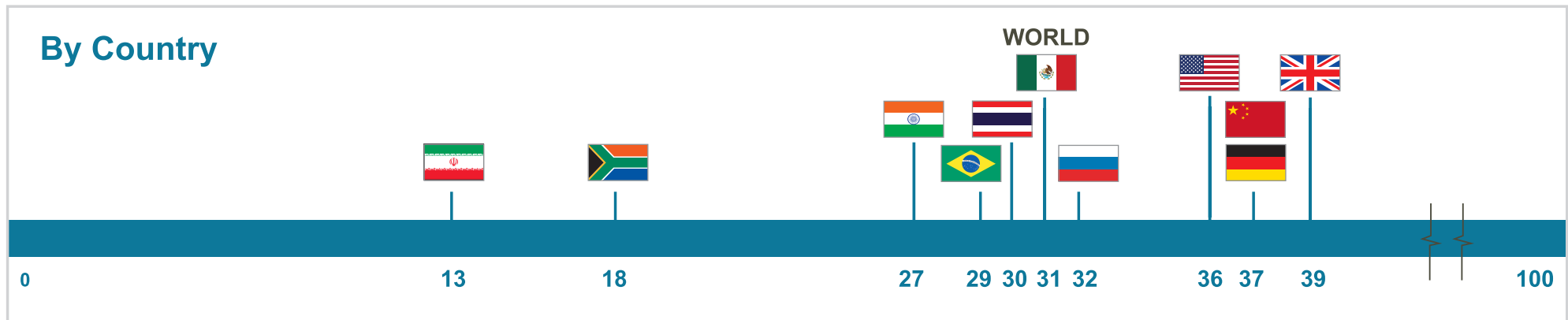
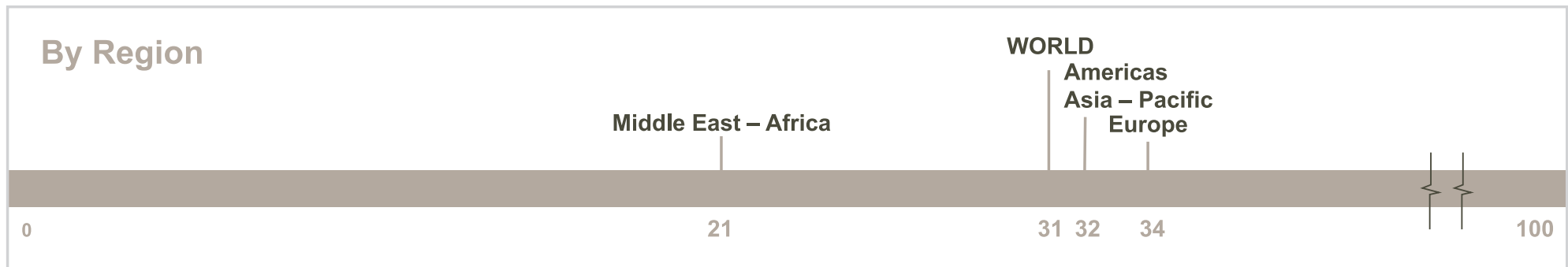


Digitisation: detail by region and type of activity

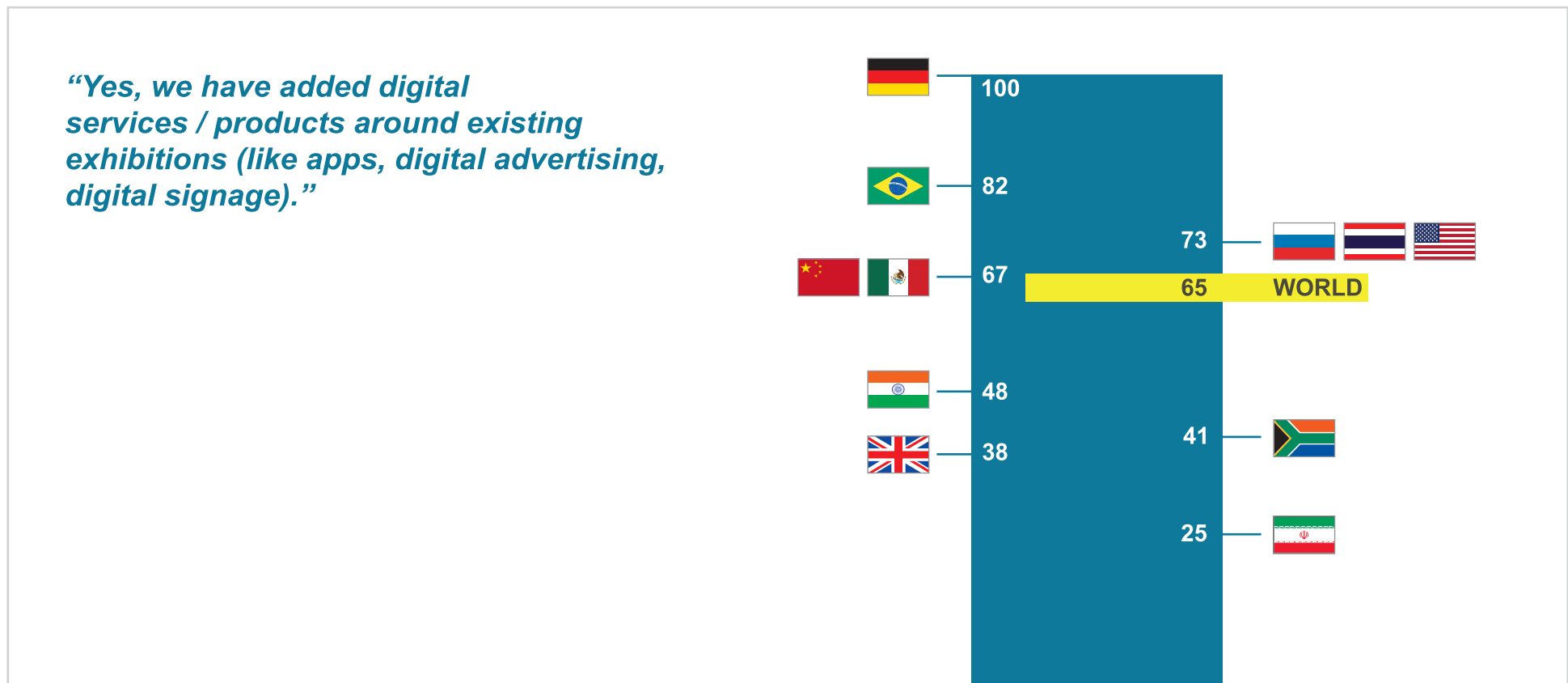
Americas Europe Middle East - Africa Asia - Pacific



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.

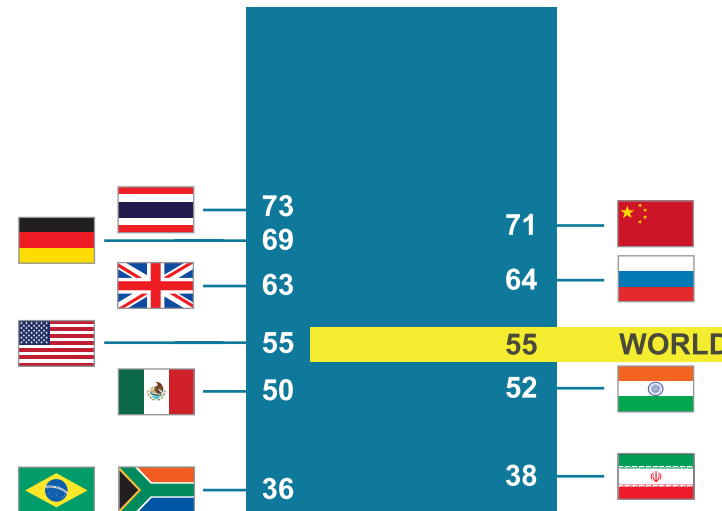


To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

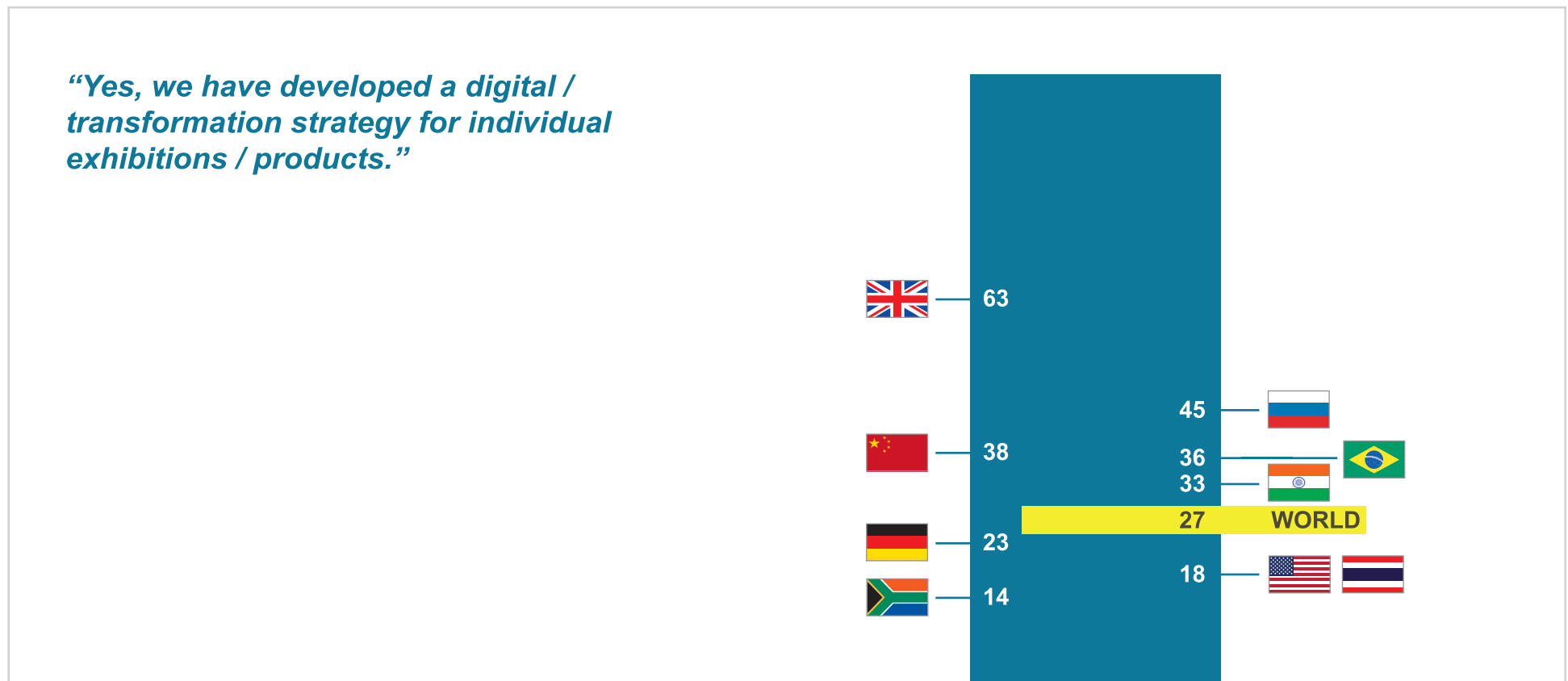


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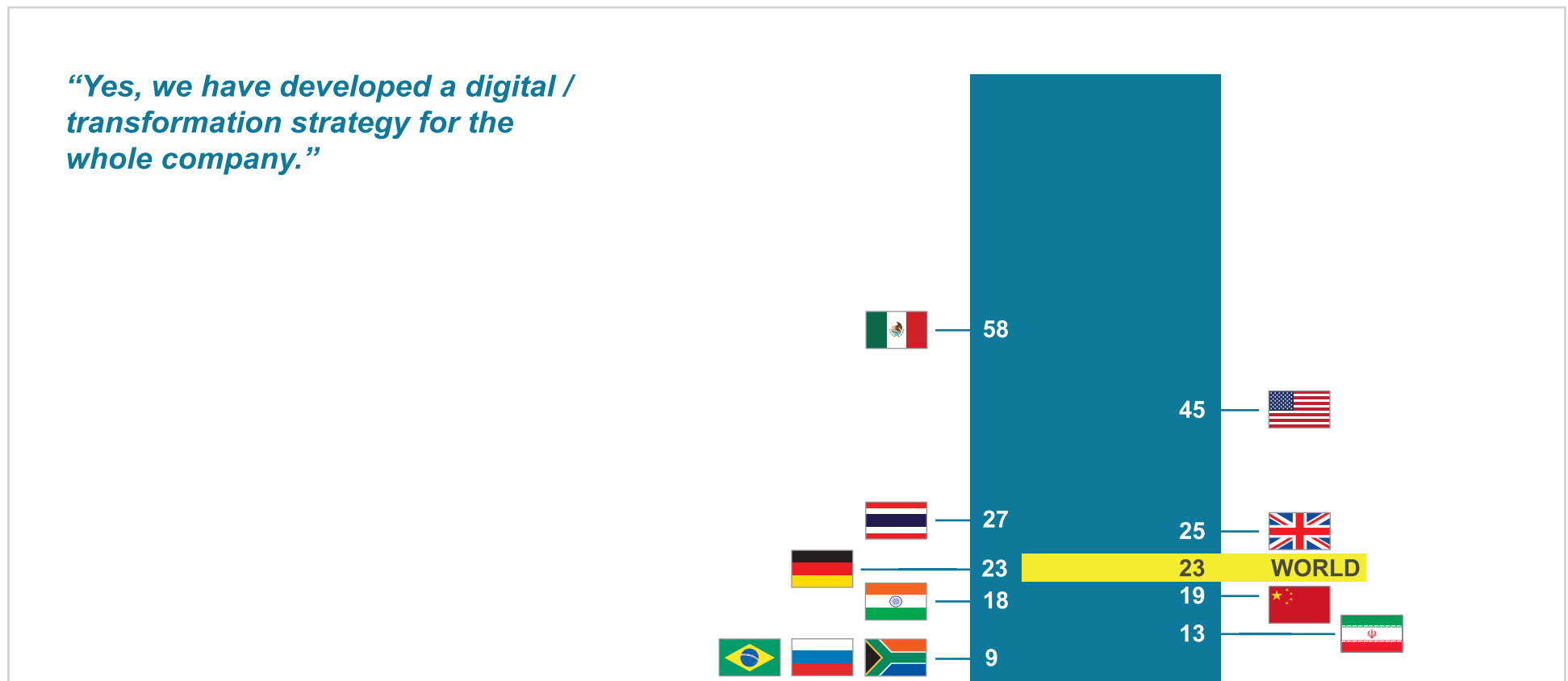
"Yes, we have changed internal processes and workflows in our company into digital processes."



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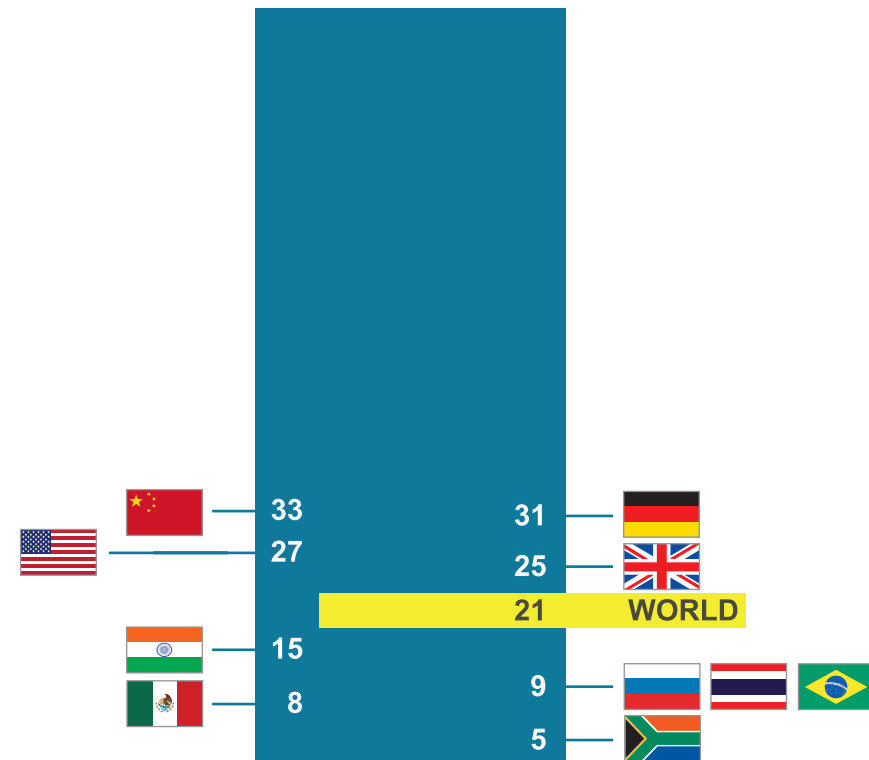


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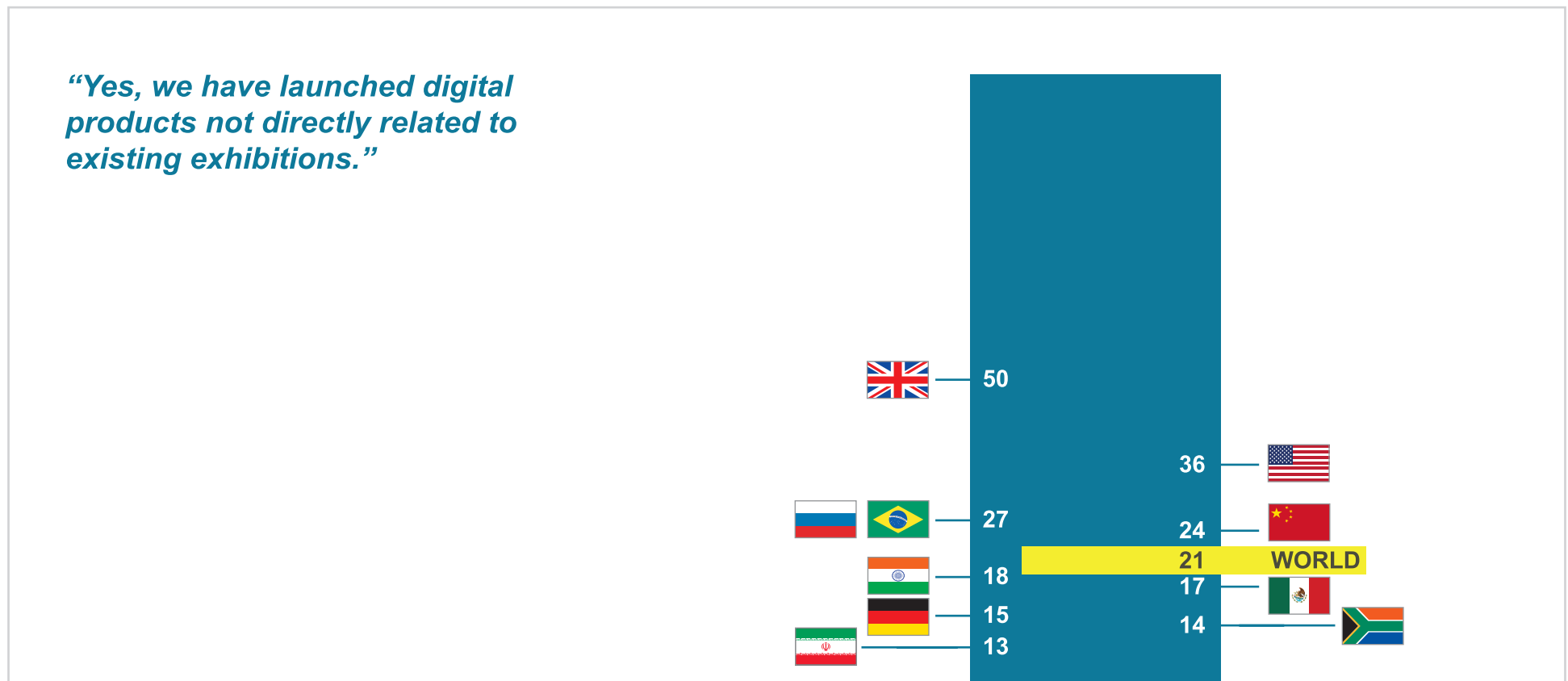


To find out how the exhibition industry is responding globally to the accelerating digitisation, we asked participants of the "Global Exhibition Barometer" to state whether or not they have implemented various digitisation activities.

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



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Part 2: Detailed results for 14 selected countries

North America:

Mexico
US

Central and South America:

Brazil
Other countries in Central & South America

Europe:

Germany
Russia
United Kingdom
Other countries in Europe

Africa:

South Africa

Middle East:

Middle East

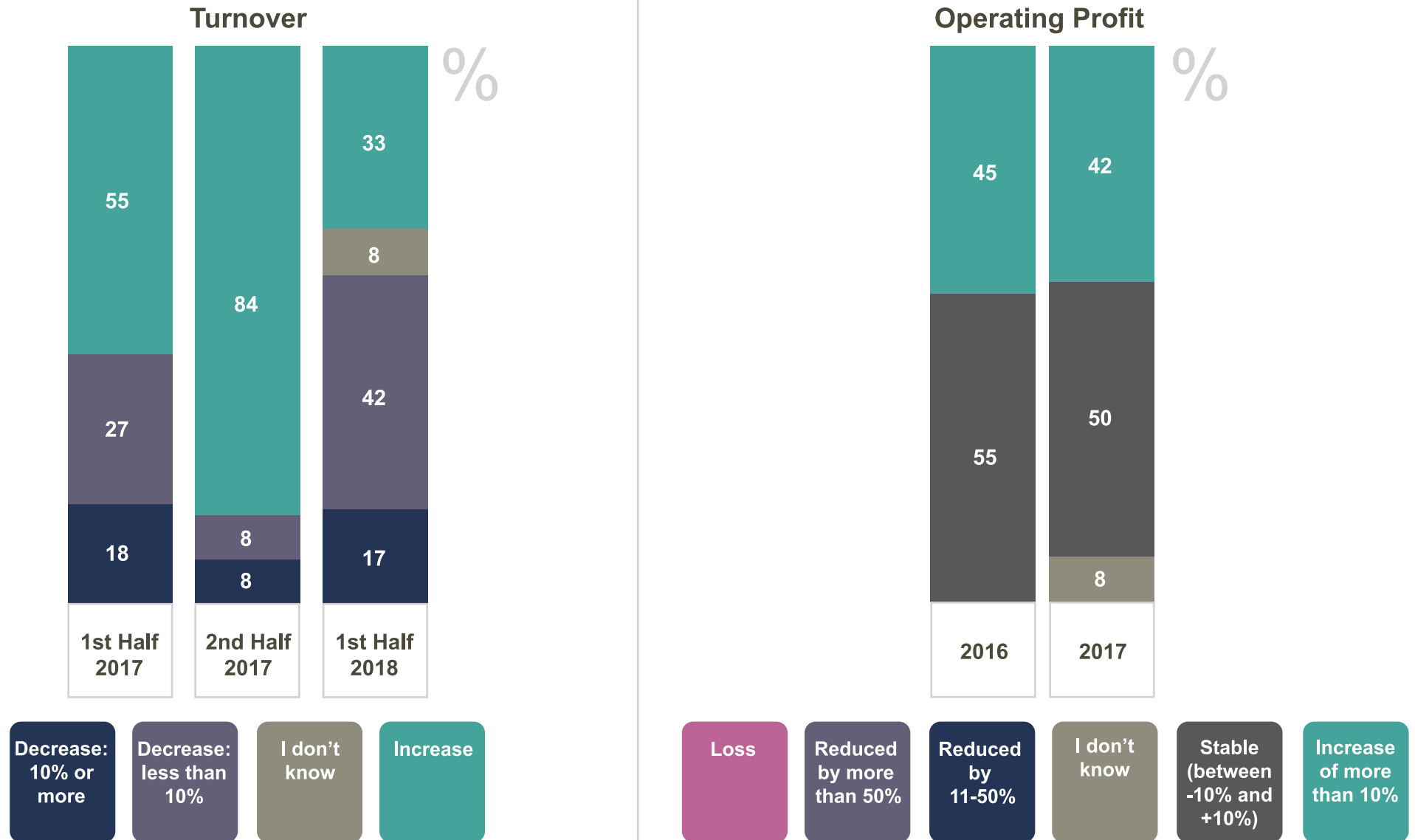
Asia - Pacific:

China
India
Thailand
Other countries in Asia - Pacific

Detailed results for MEXICO (12 answers)



Financial expectations of Mexican exhibition companies compared to previous years



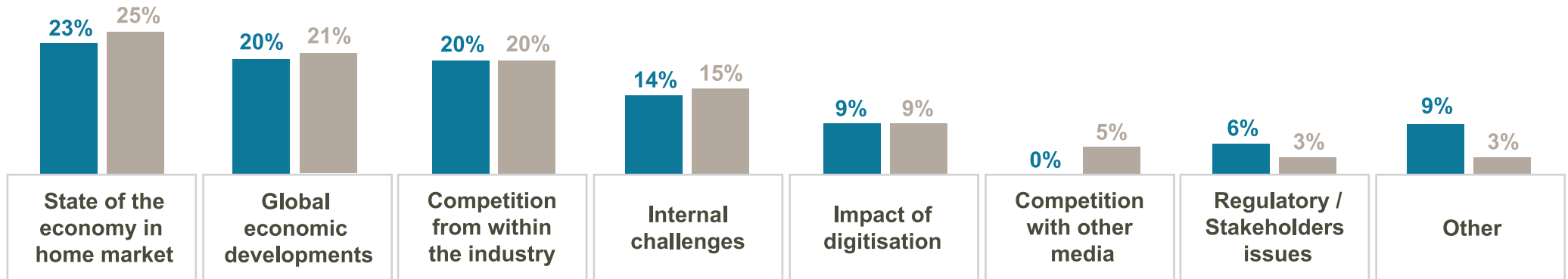
Detailed results for MEXICO (12 answers)



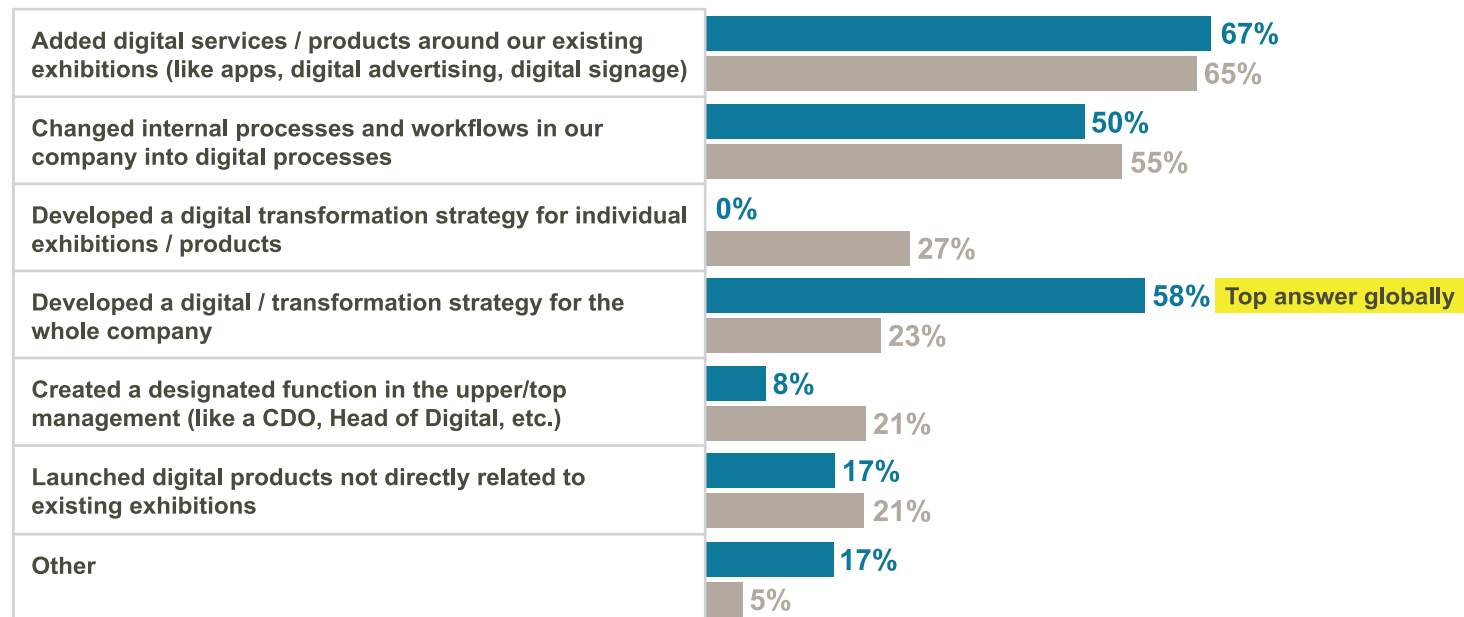
Most important business issues in the exhibition industry in Mexico and globally

Mexico

Global



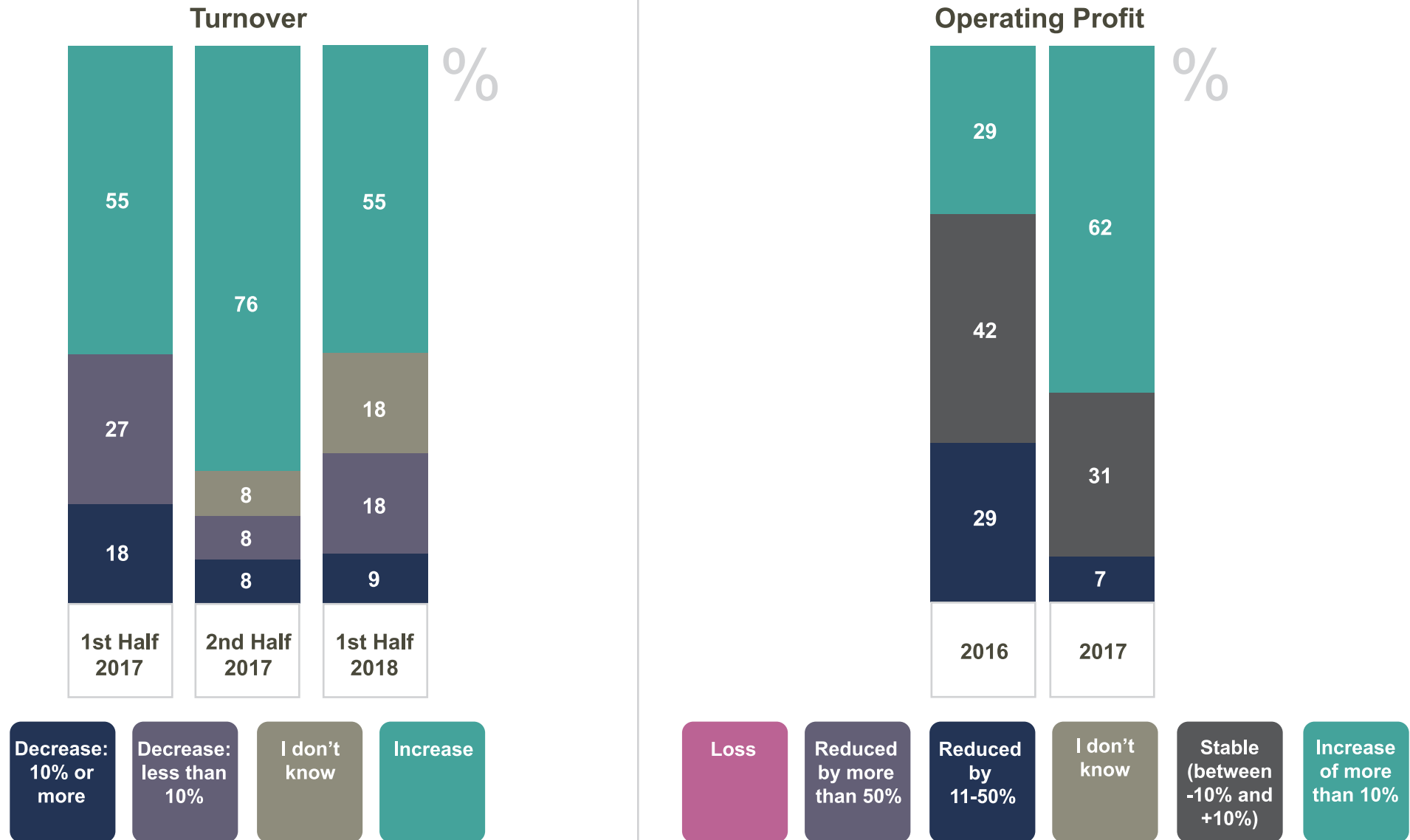
Digitisation: implementation in Mexico and globally



Detailed results for US (15 answers)



Financial expectations of US exhibition companies compared to previous years

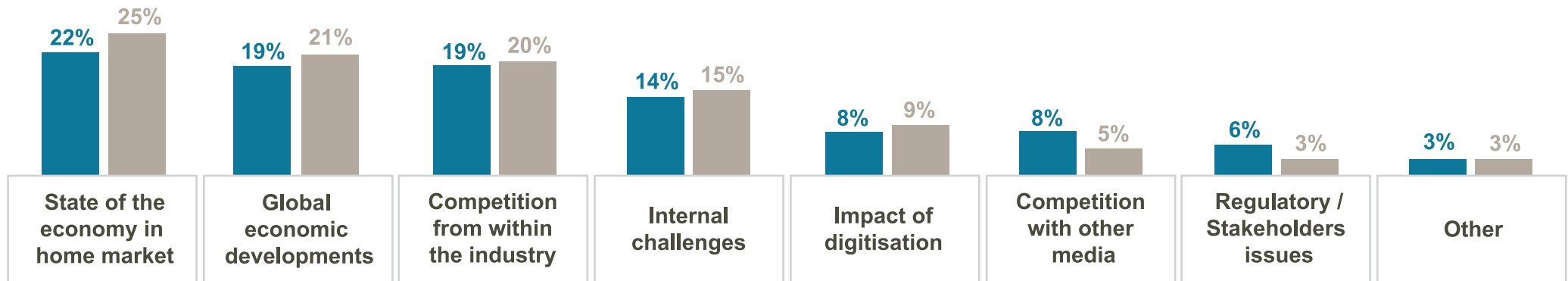


Detailed results for US (15 answers)



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

US Global



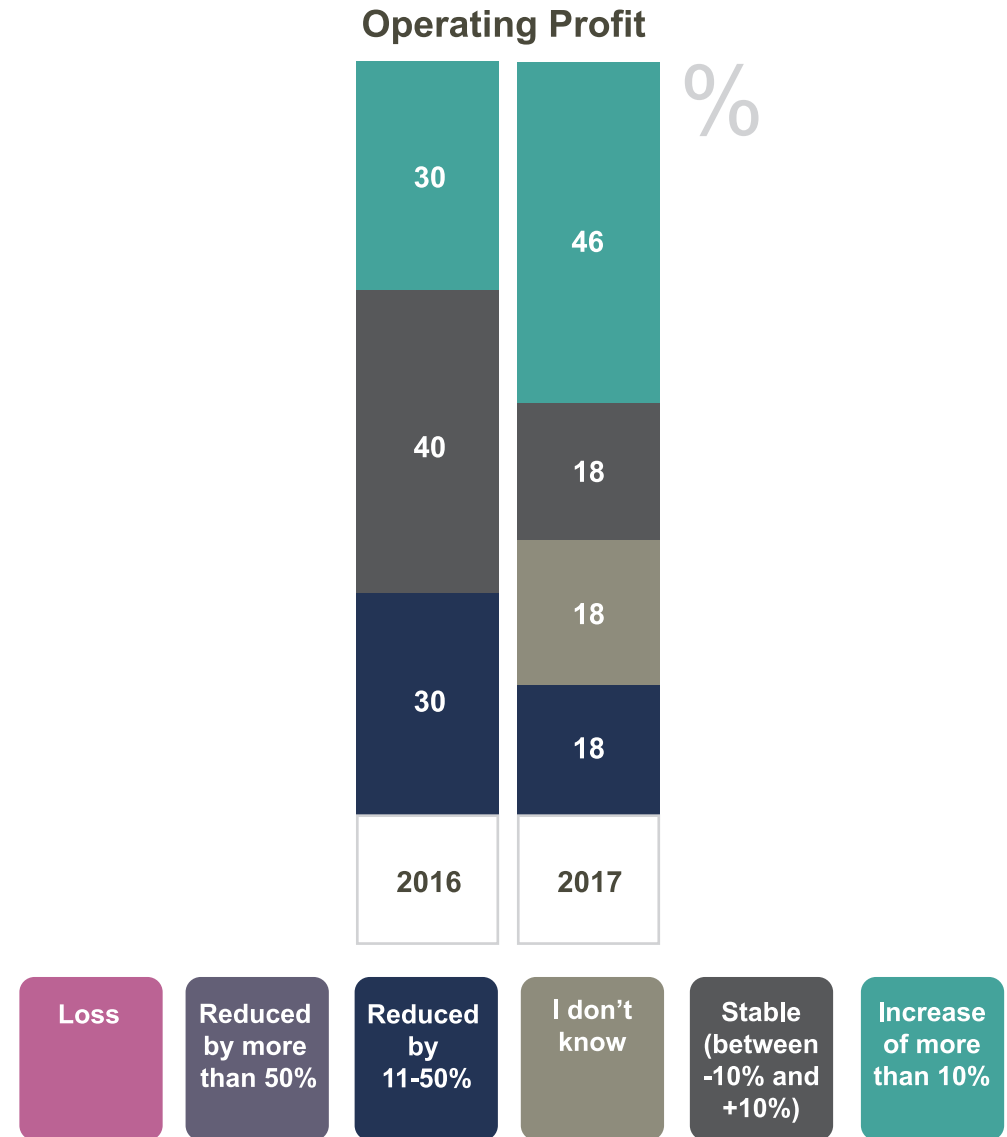
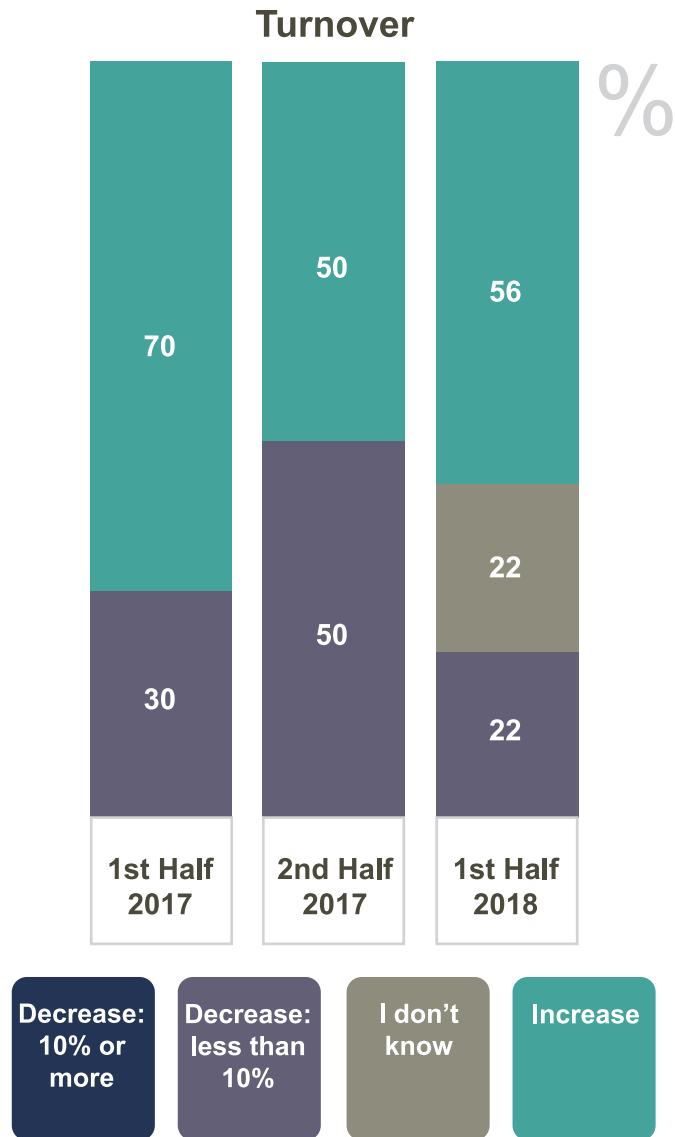
Digitisation: implementation in US and globally



Detailed results for Brazil (11 answers)



Financial expectations of Brazilian exhibition companies compared to previous years



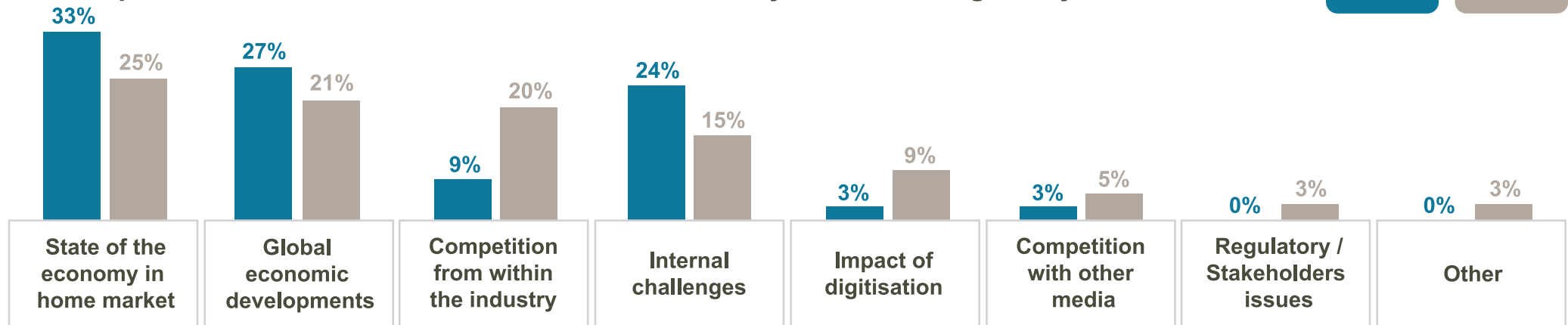
Detailed results for Brazil (11 answers)



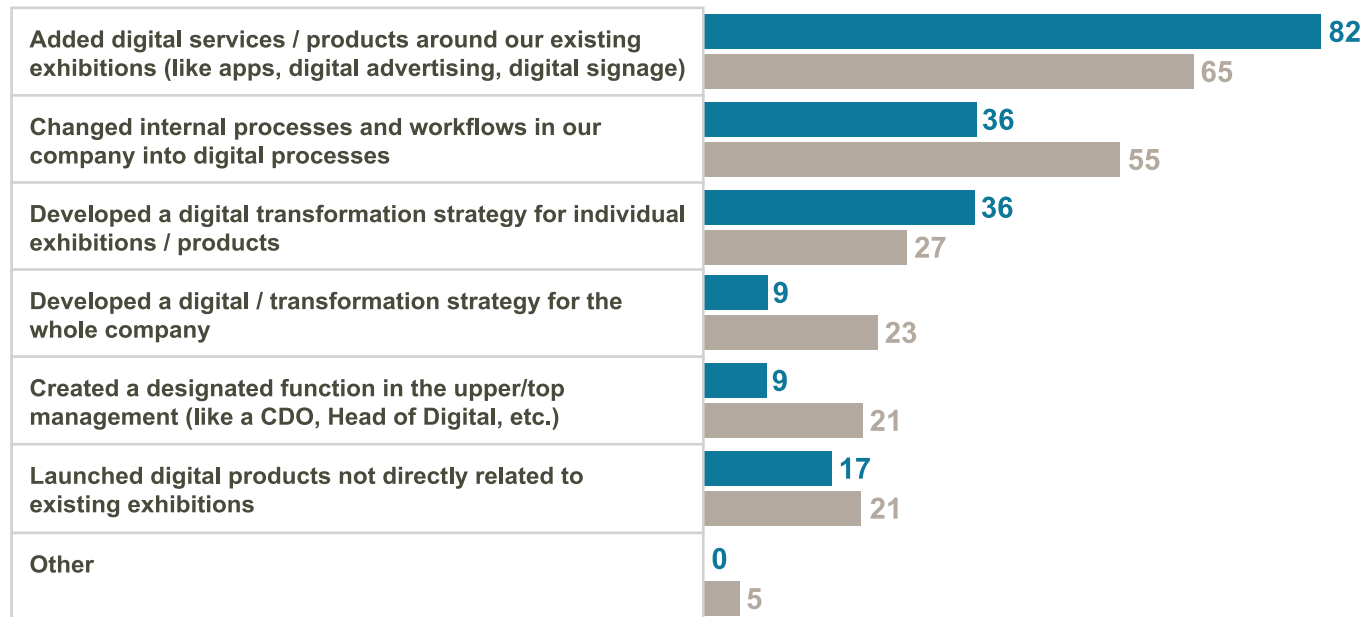
Most important business issues in the exhibition industry in Brazil and globally

Brazil

Global

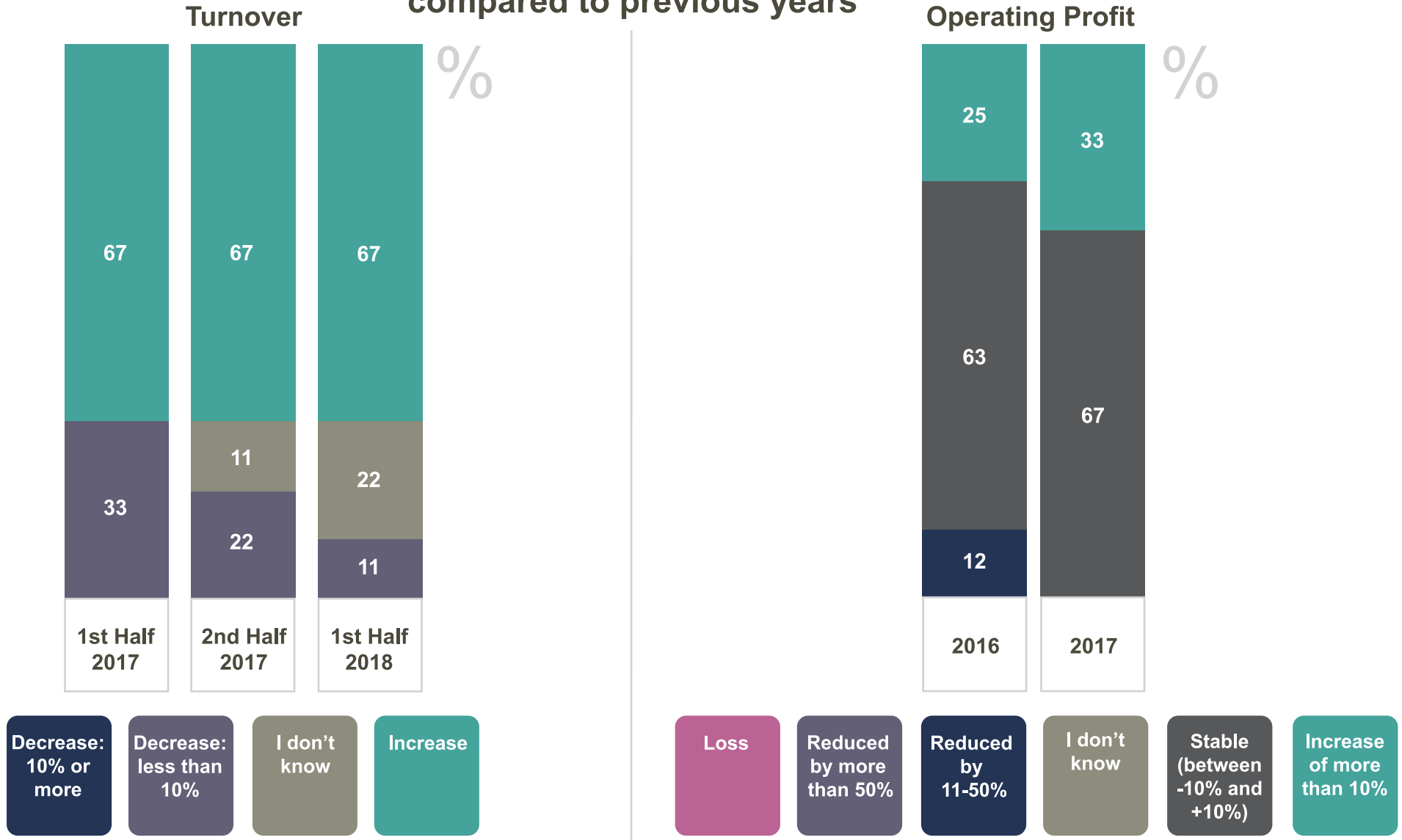


Digitisation: implementation in Brazil and globally



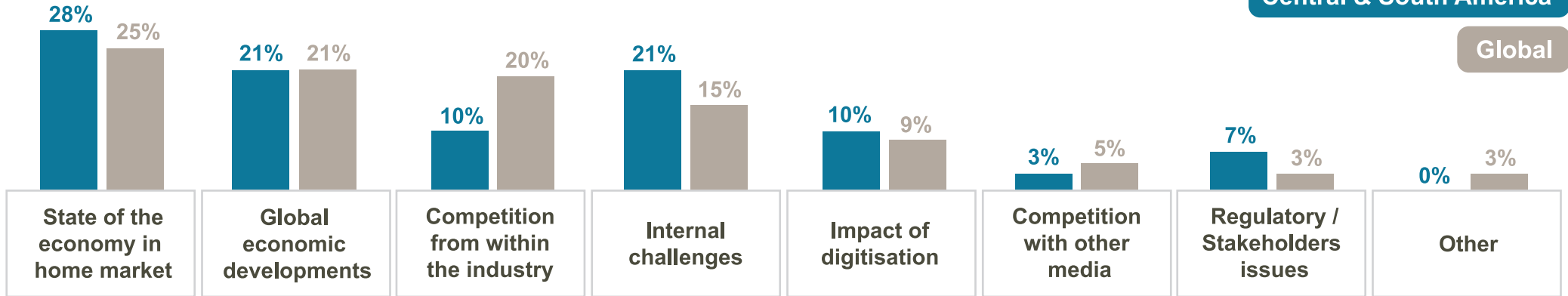
Detailed results for other countries in Central & South America (11 answers)

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

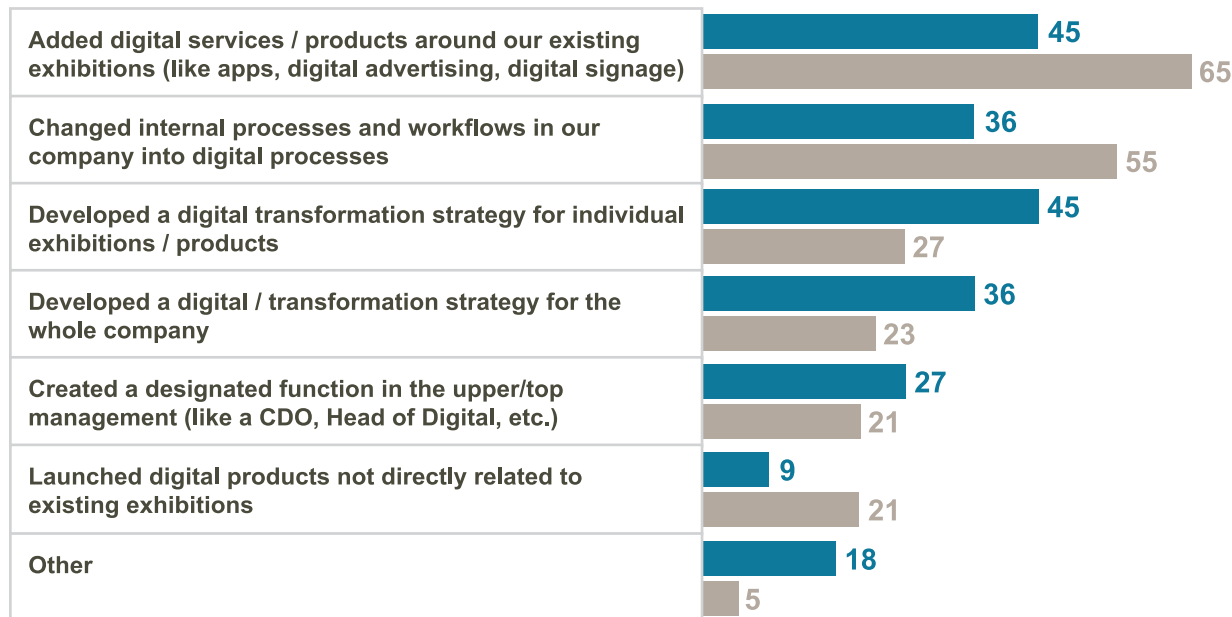


Detailed results for other countries in Central & South America (11 answers)

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



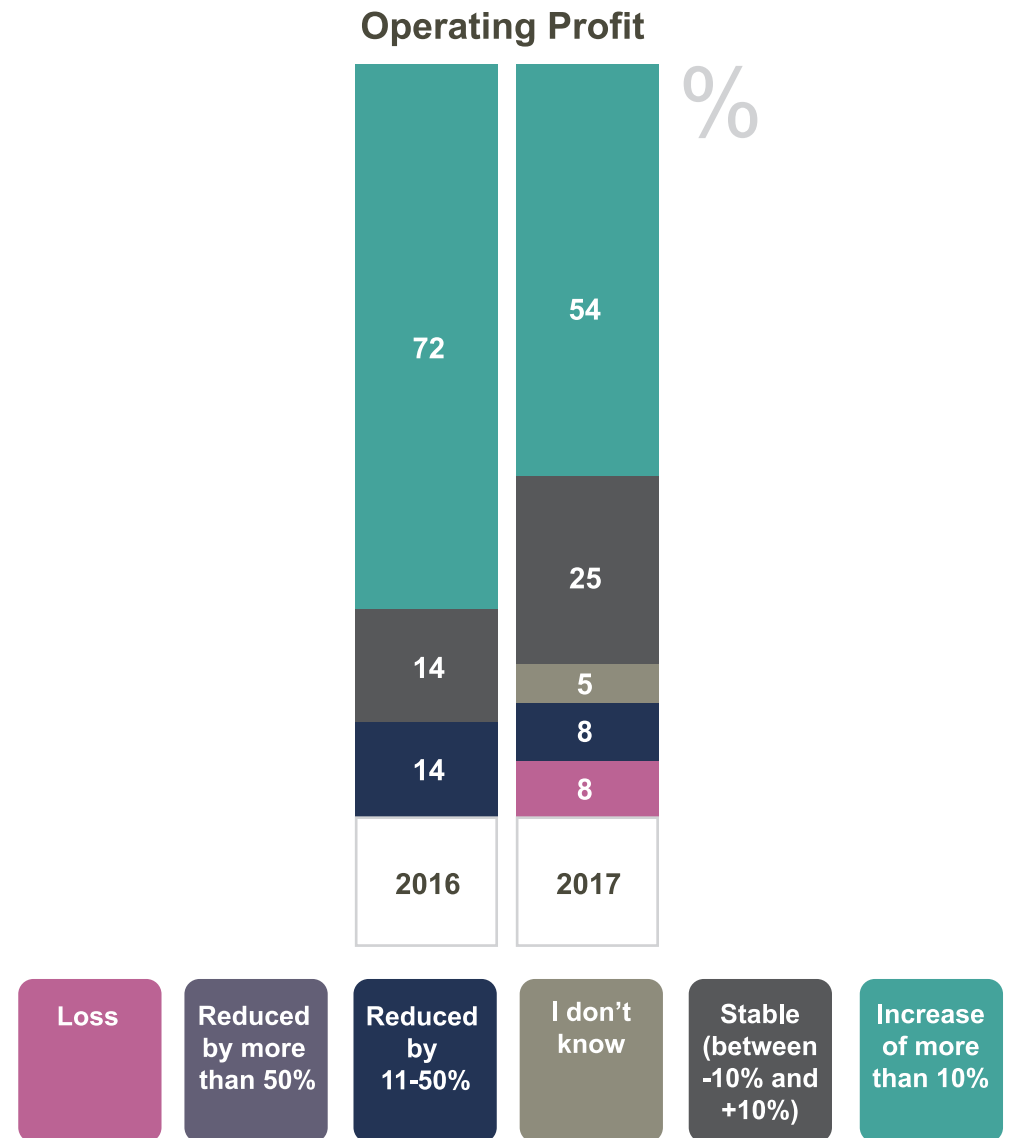
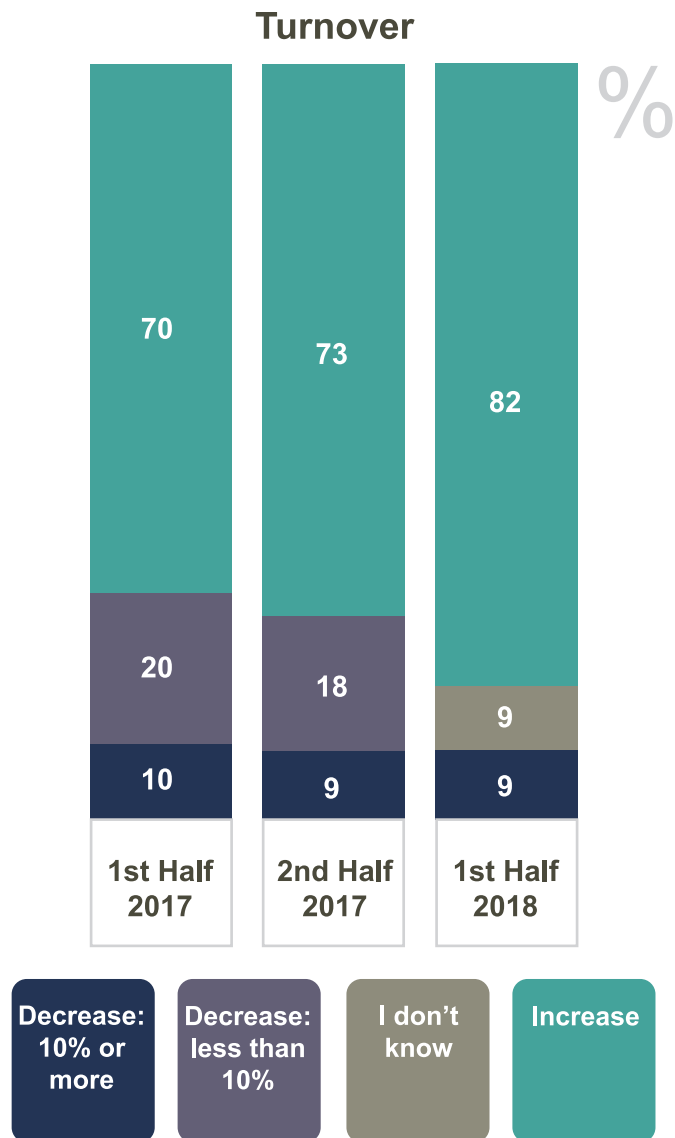
Digitisation: implementation in other countries in Central & South America and globally



Detailed results for Germany (15 answers)



Financial expectations of German exhibition companies compared to previous years



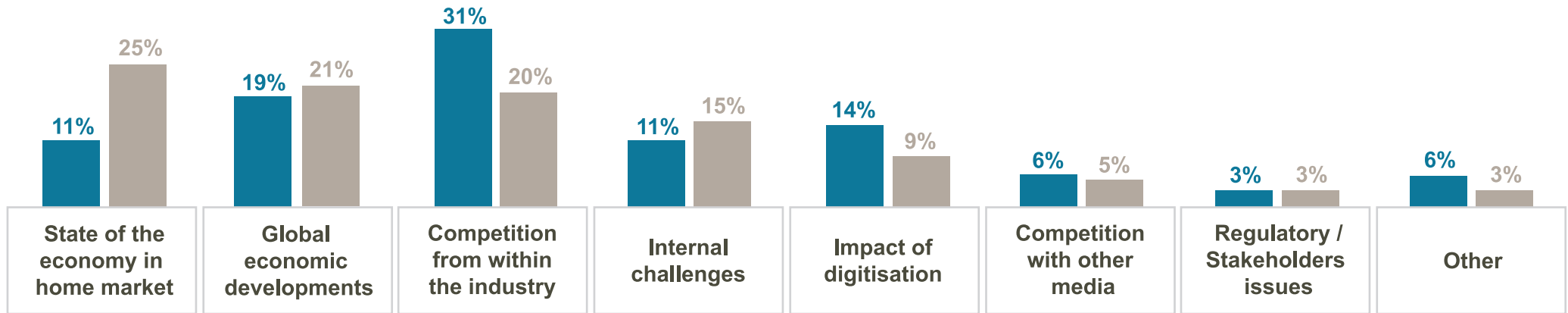
Detailed results for Germany (15 answers)



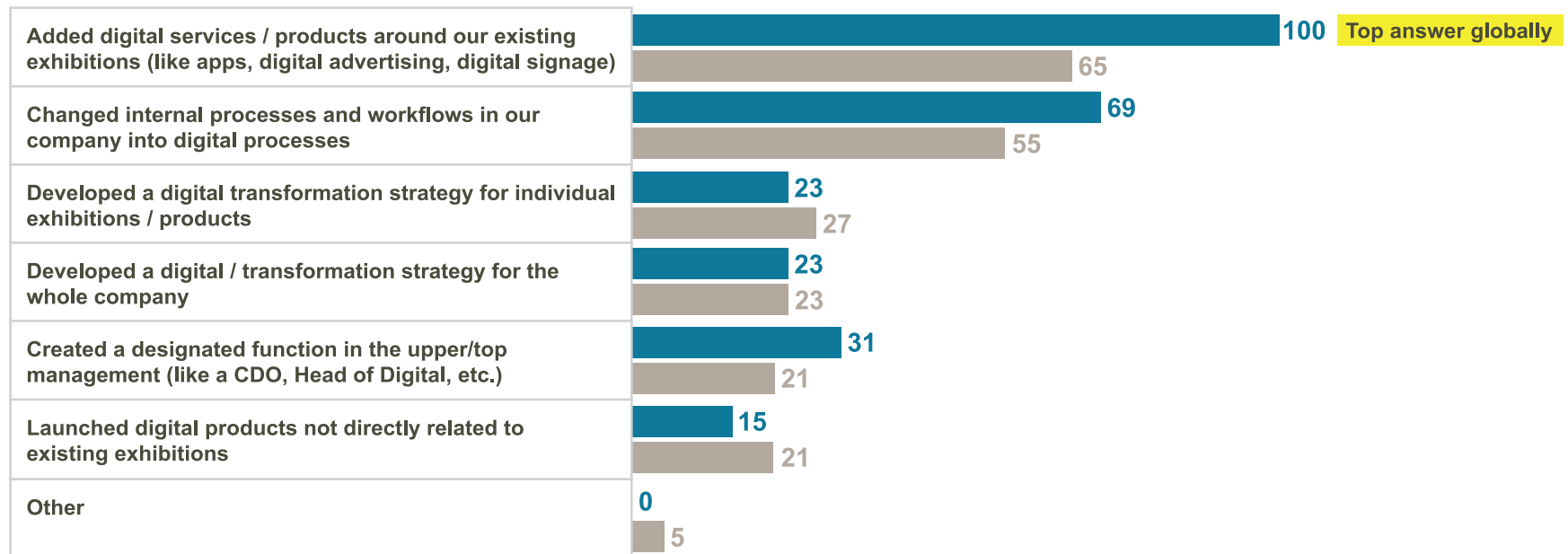
Most important business issues in the exhibition industry in Germany and globally

Germany

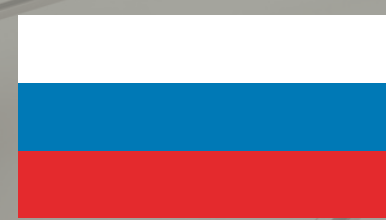
Global



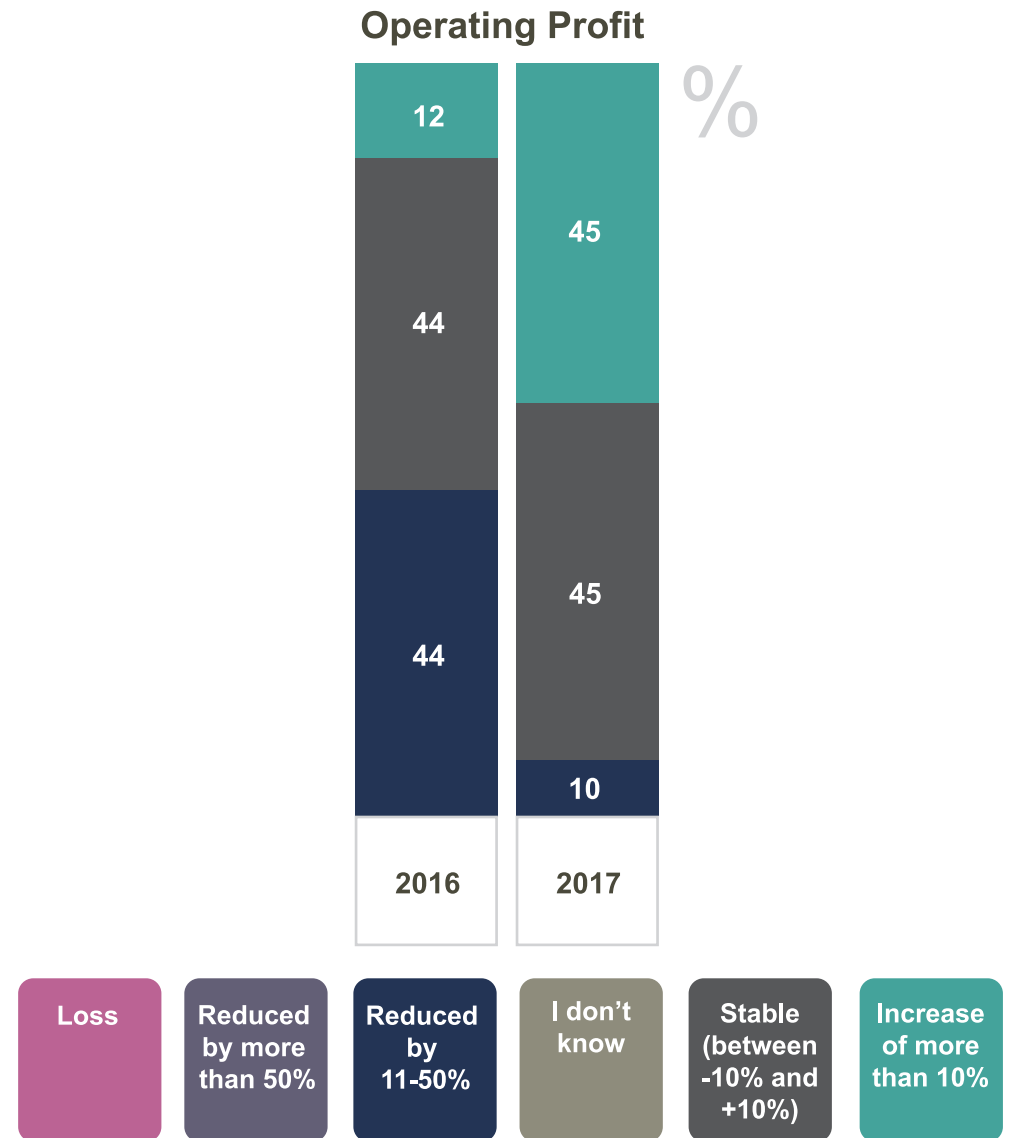
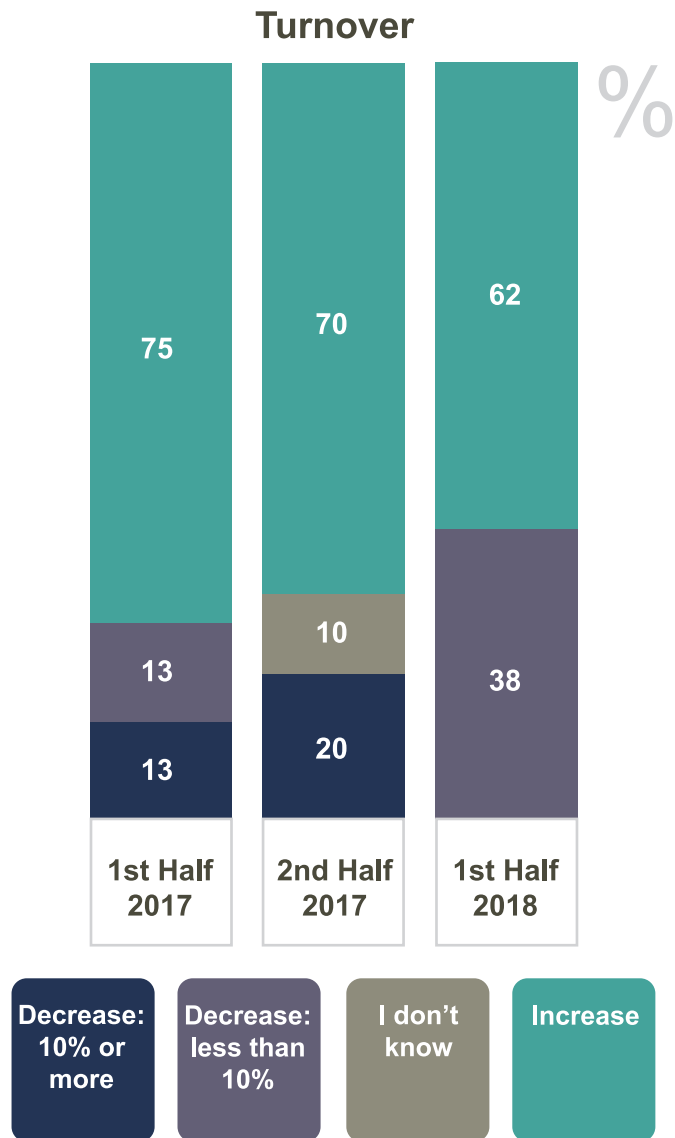
Digitisation: implementation in Germany and globally



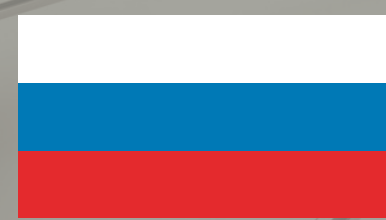
Detailed results for Russia (13 answers)



Financial expectations of Russian exhibition companies compared to previous years



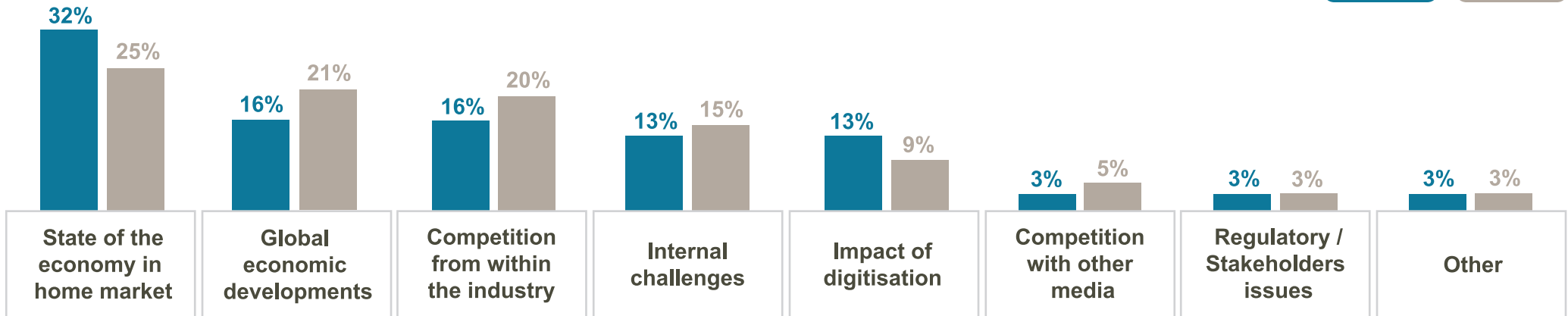
Detailed results for Russia (13 answers)



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

Russia

Global

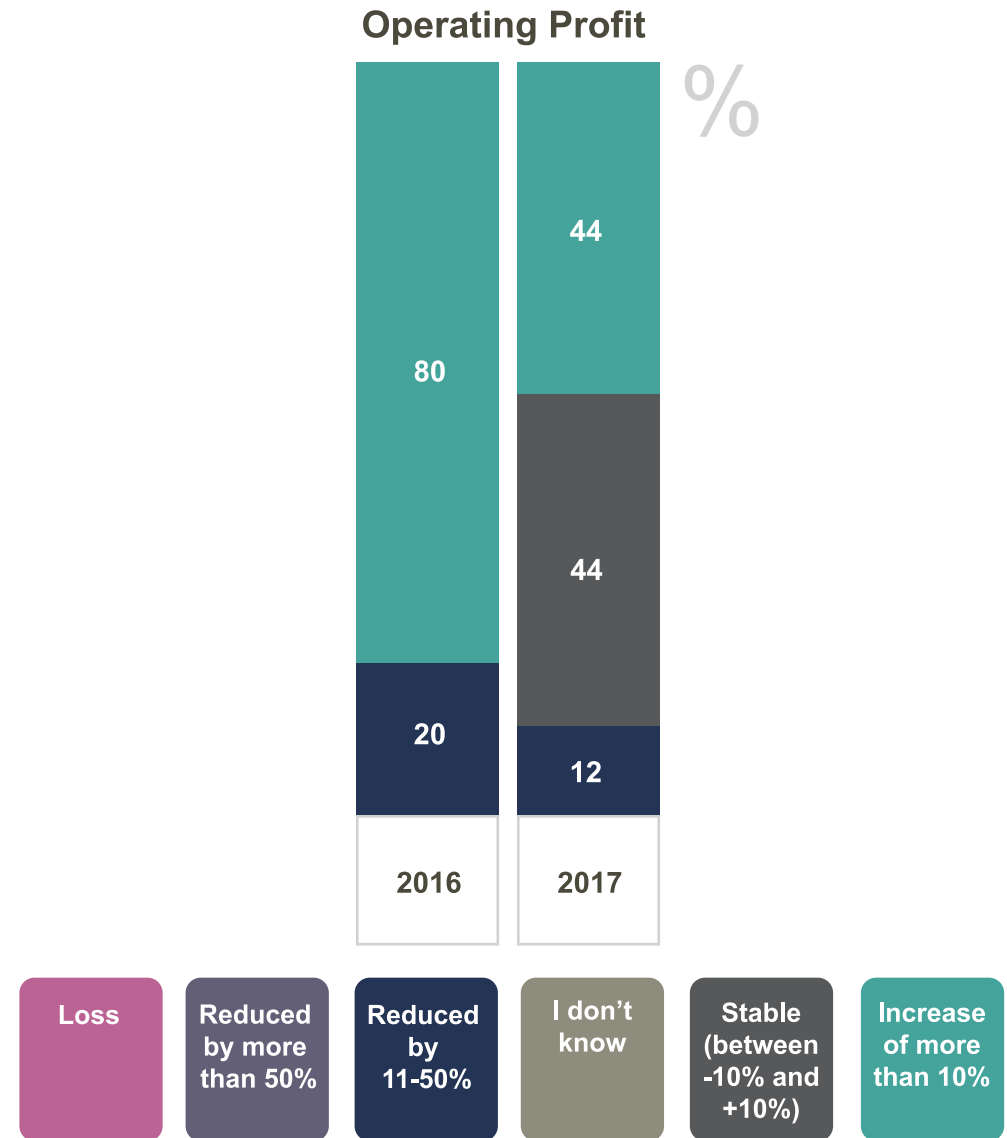
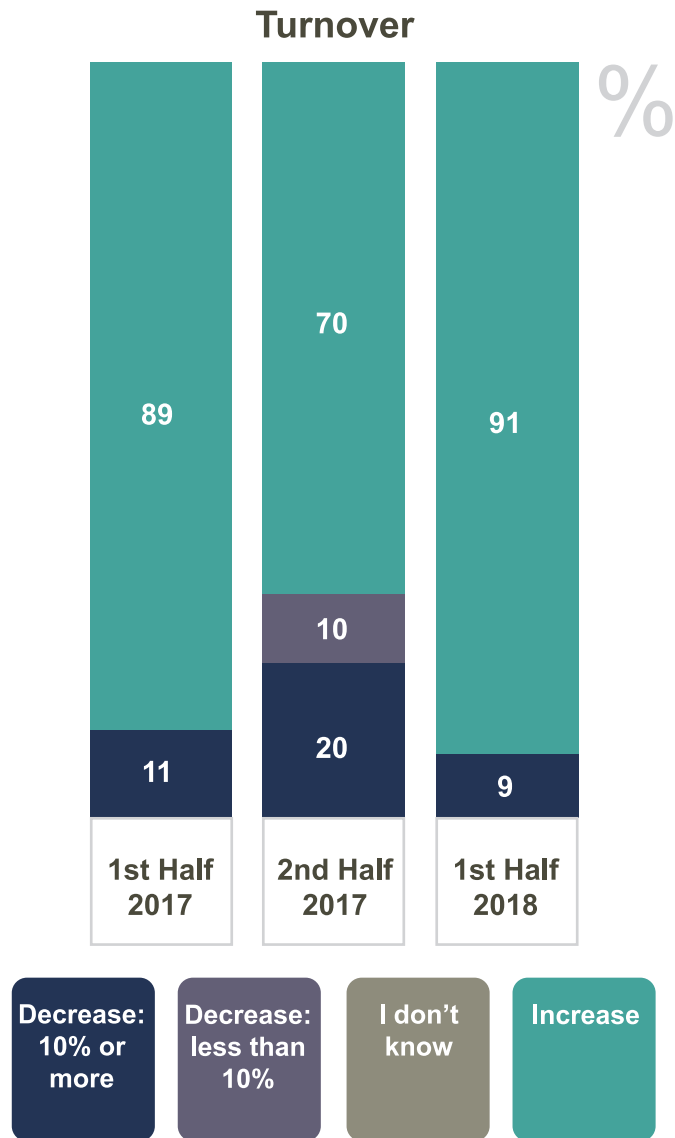


Digitisation: implementation in Russia and globally





Financial expectations of UK exhibition companies compared to previous years



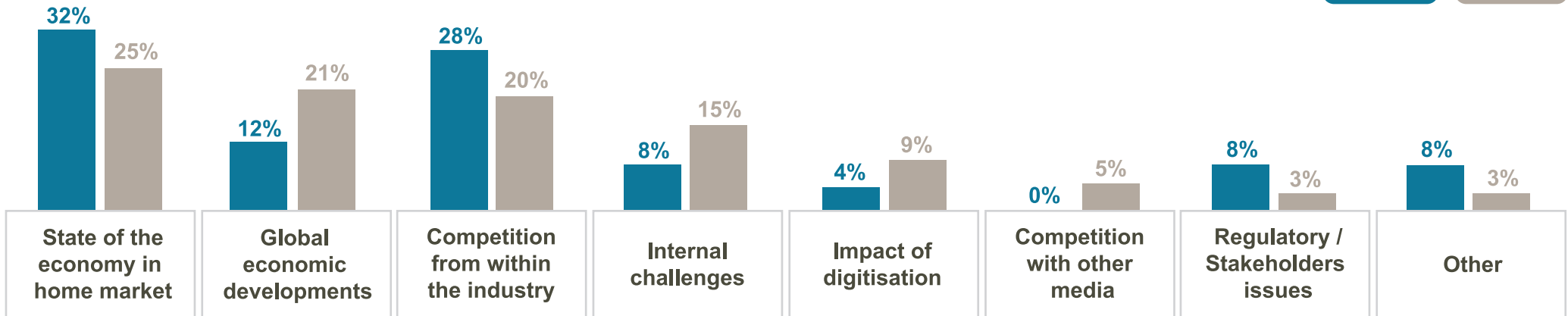
Detailed results for UK (11 answers)



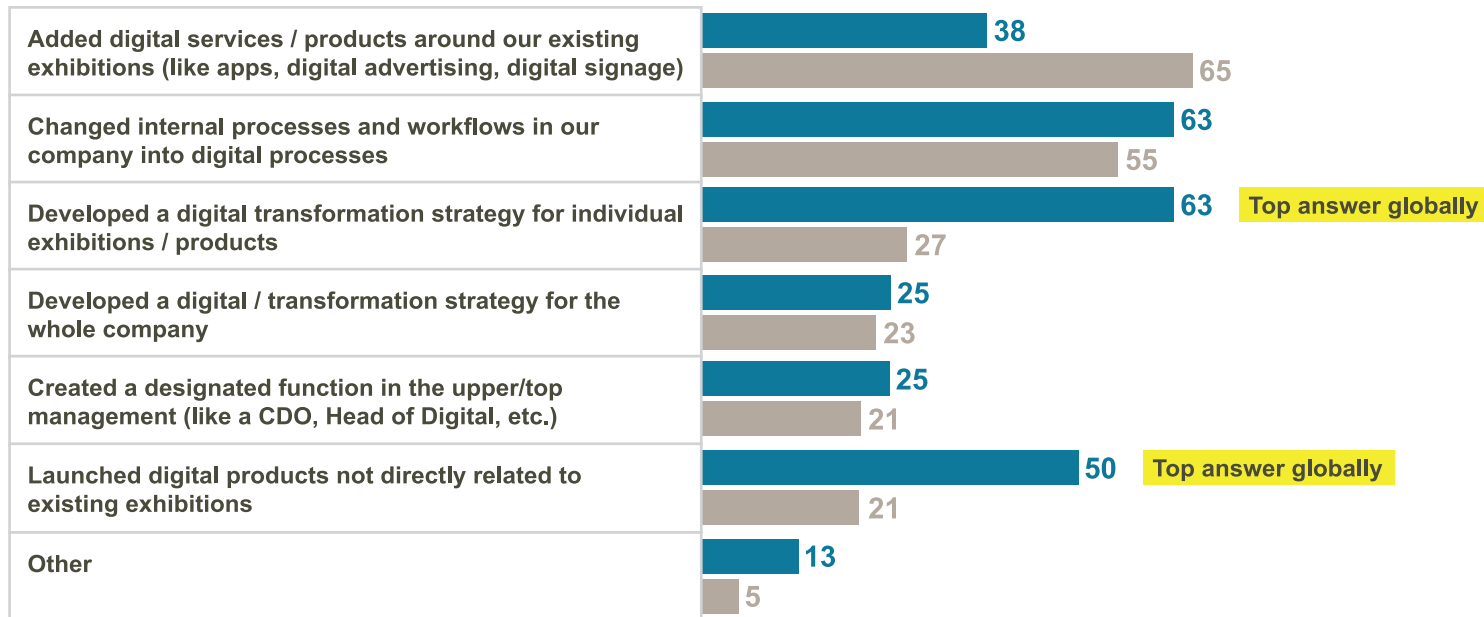
Most important business issues in the exhibition industry in UK and globally

UK

Global

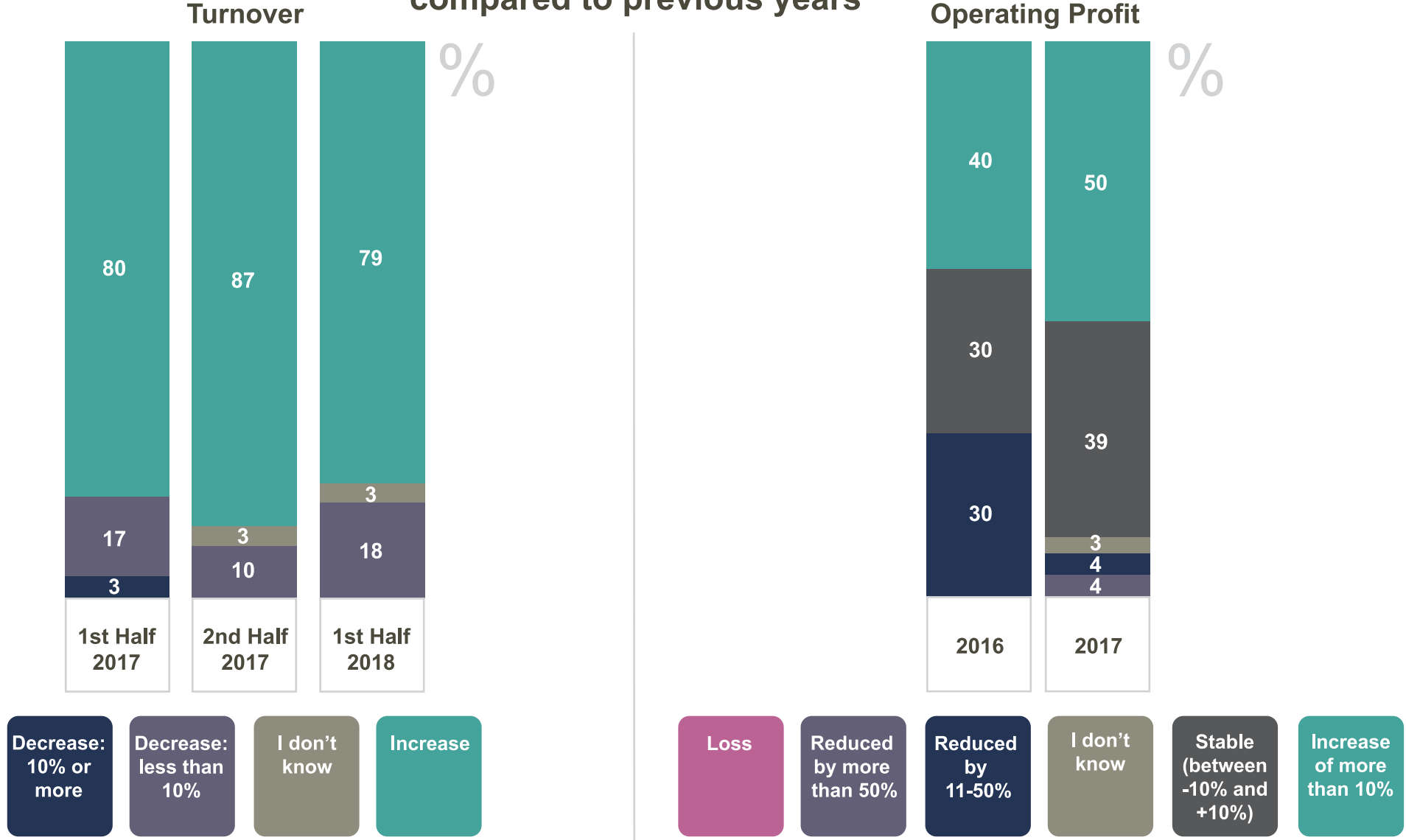


Digitisation: implementation in UK and globally



Detailed results for other countries in Europe (36 answers)

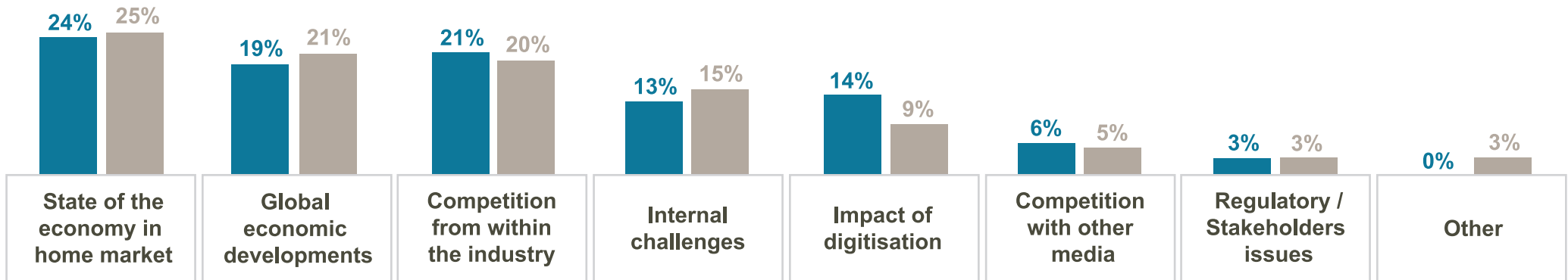
Financial expectations of exhibition companies from other countries in Europe compared to previous years



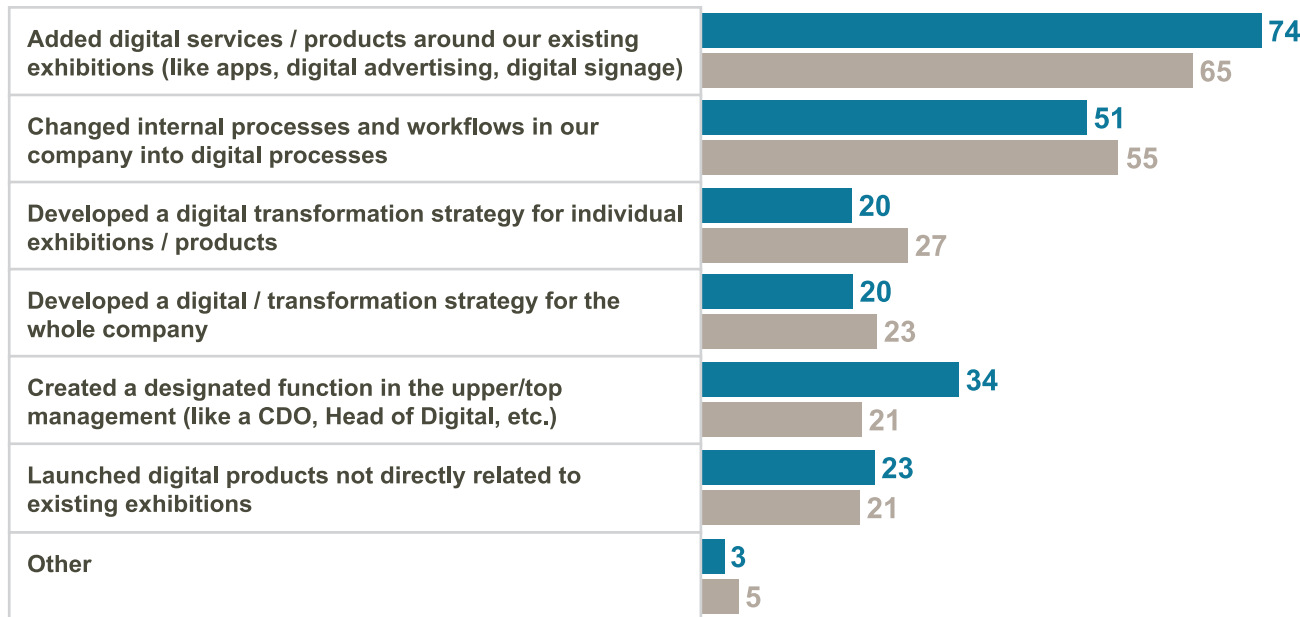
Detailed results for other countries in Europe (36 answers)

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

Europe
Global

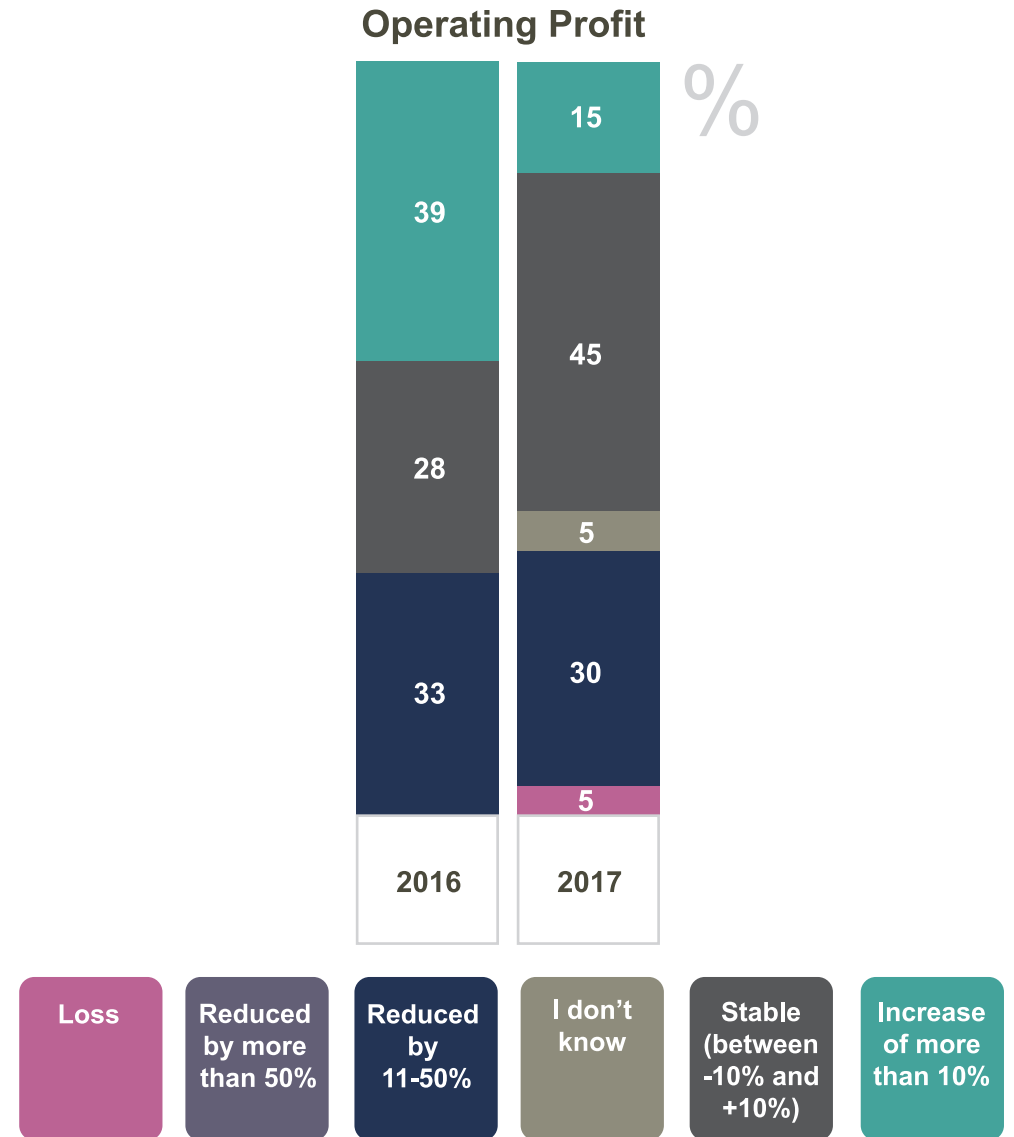
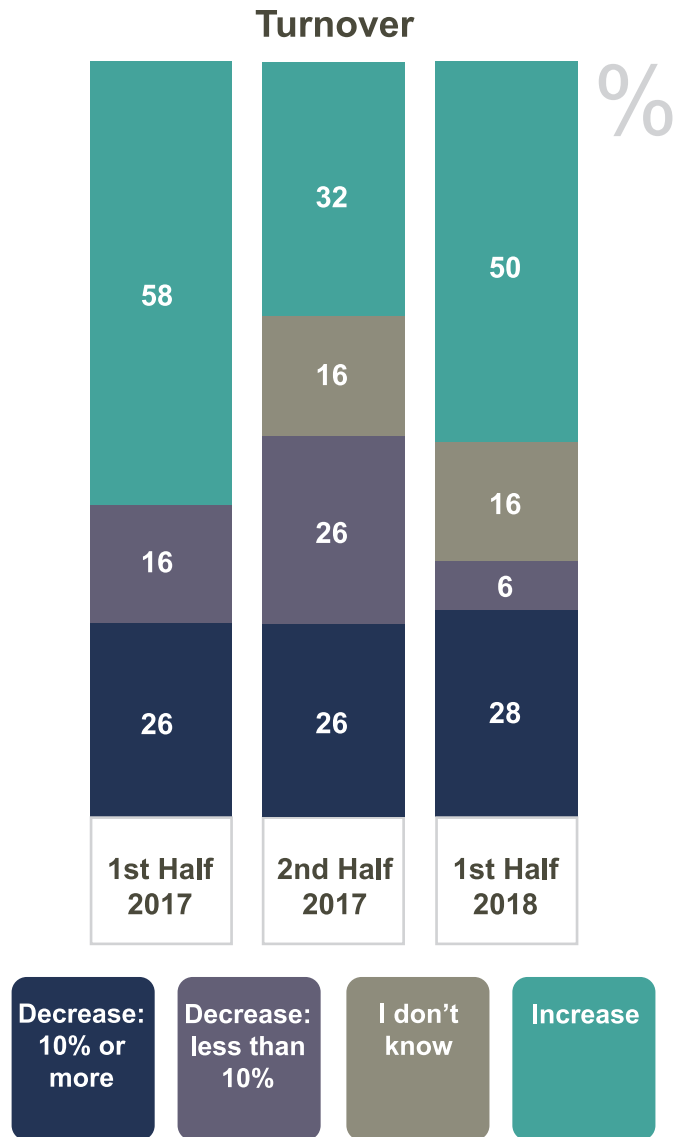


Digitisation: implementation in Europe and globally





Financial expectations of South African exhibition companies compared to previous years

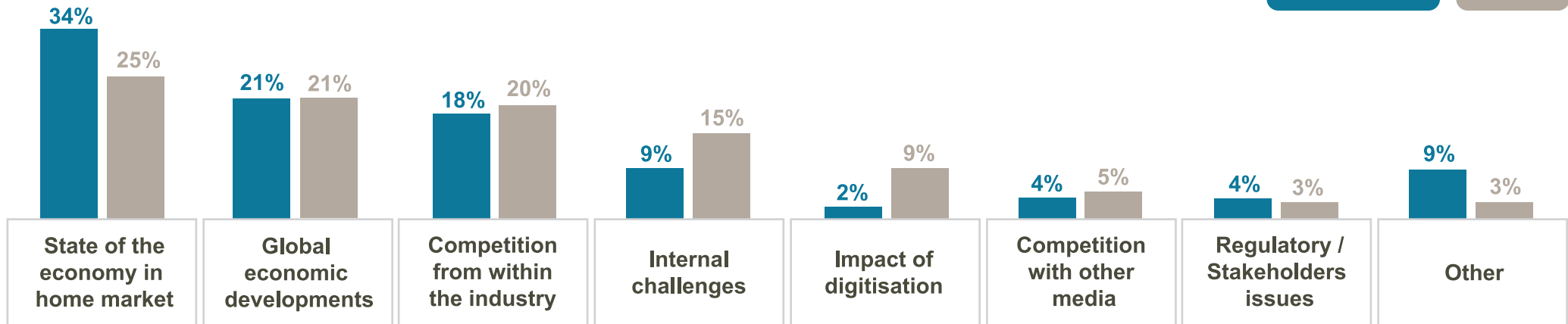


Detailed results for South Africa (22 answers)

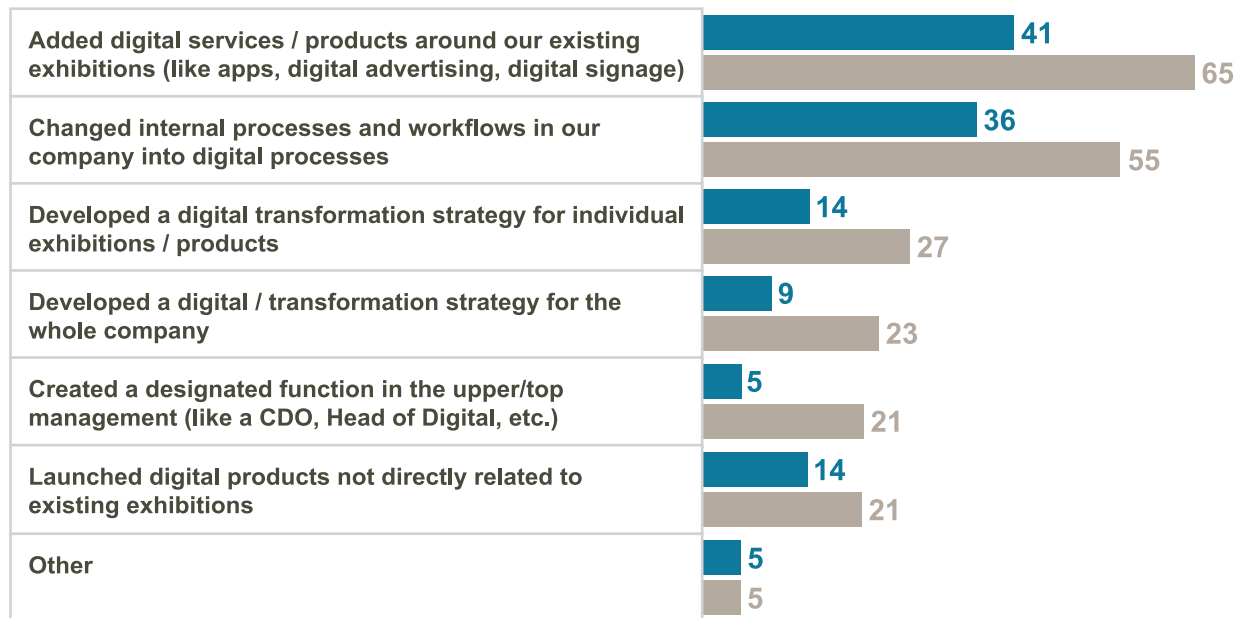


Most important business issues in the exhibition industry in South Africa and globally

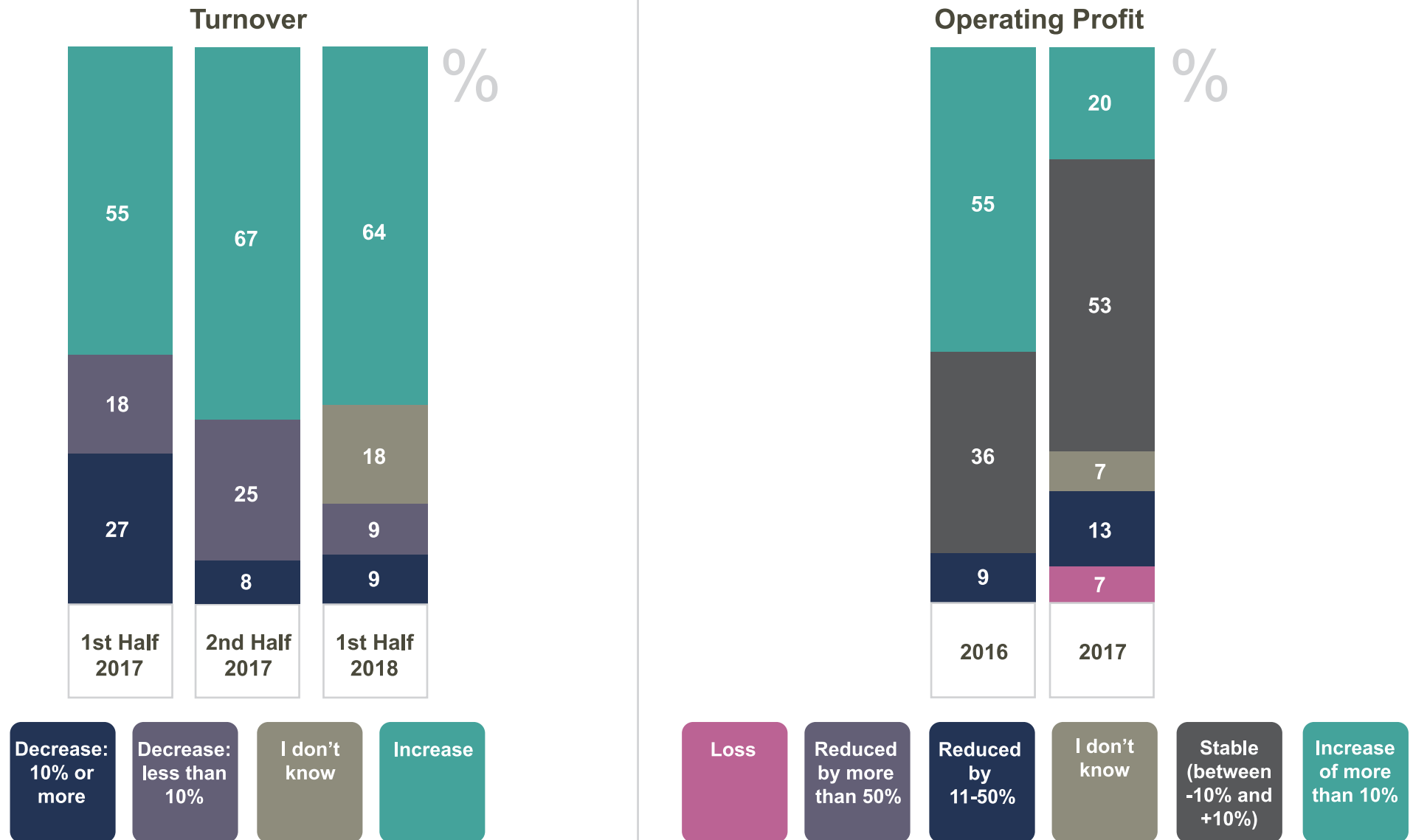
South Africa Global



Digitisation: implementation in South Africa and globally



Financial expectations of Middle East exhibition companies compared to previous years

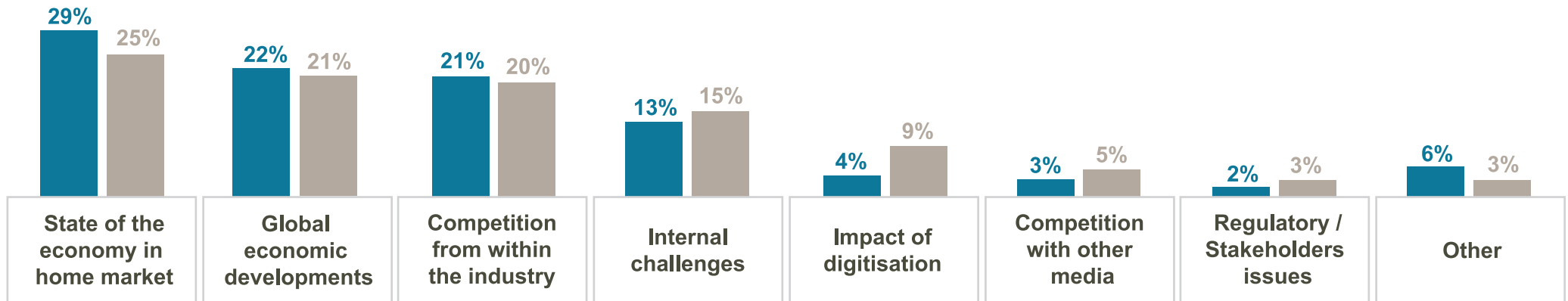


Detailed results the Middle East (18 answers)

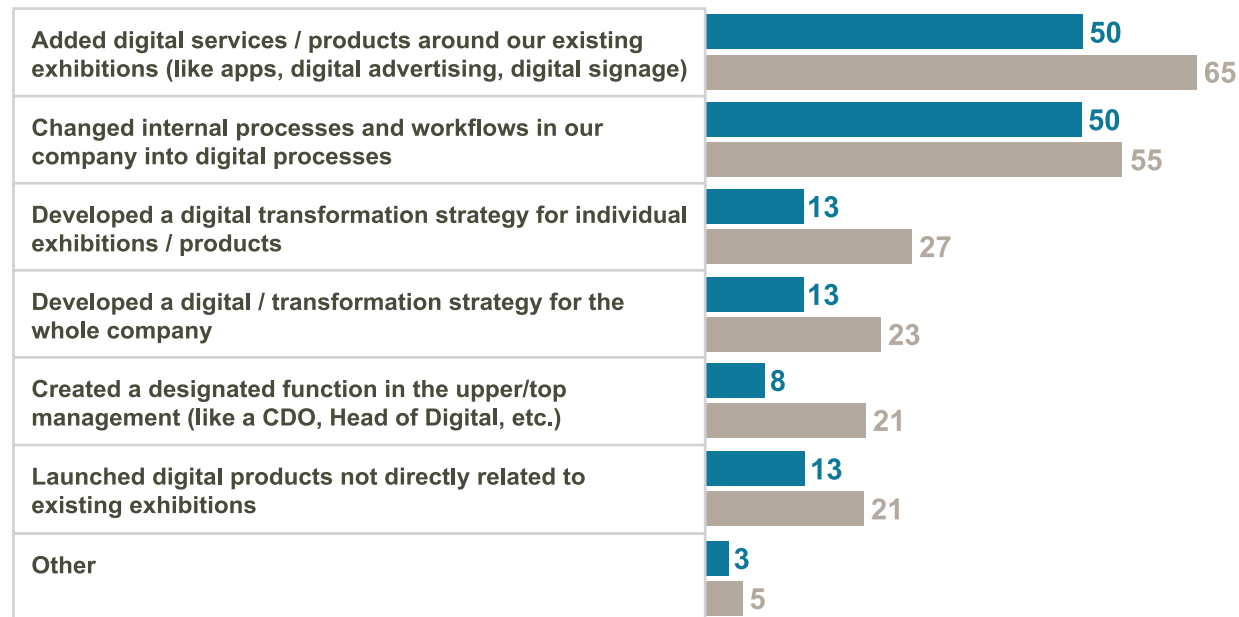
Most important business issues in the exhibition industry in the Middle East and globally

Middle East

Global



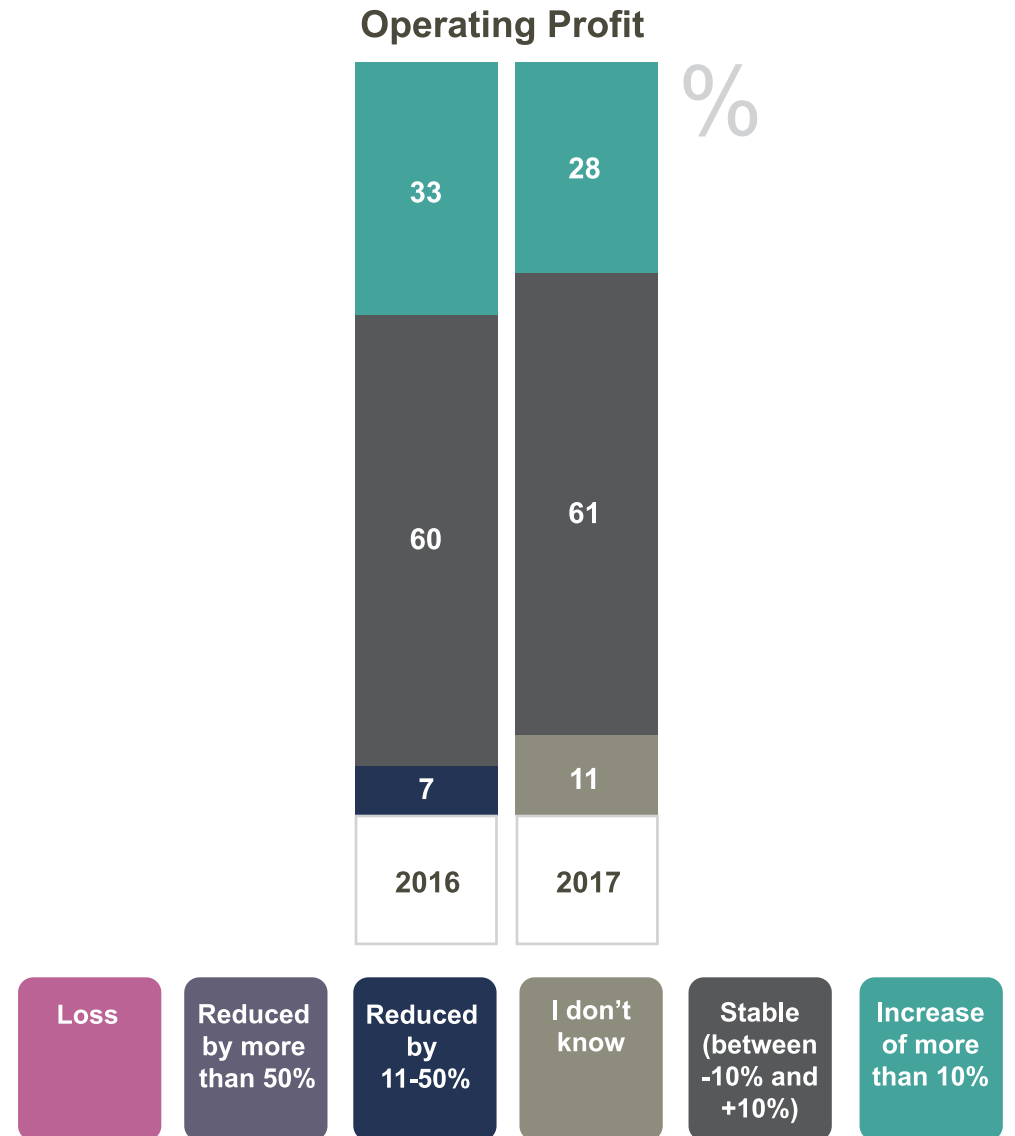
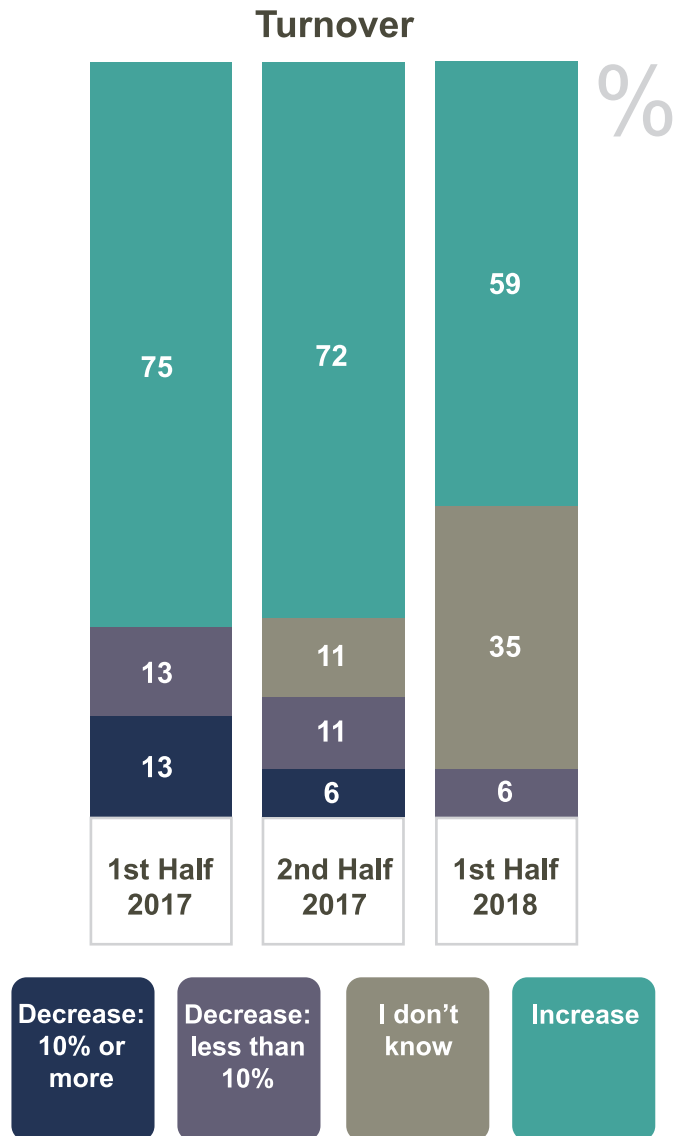
Digitisation: implementation in the Middle East and globally



Detailed results for China (21 answers)



Financial expectations of Chinese exhibition companies compared to previous years



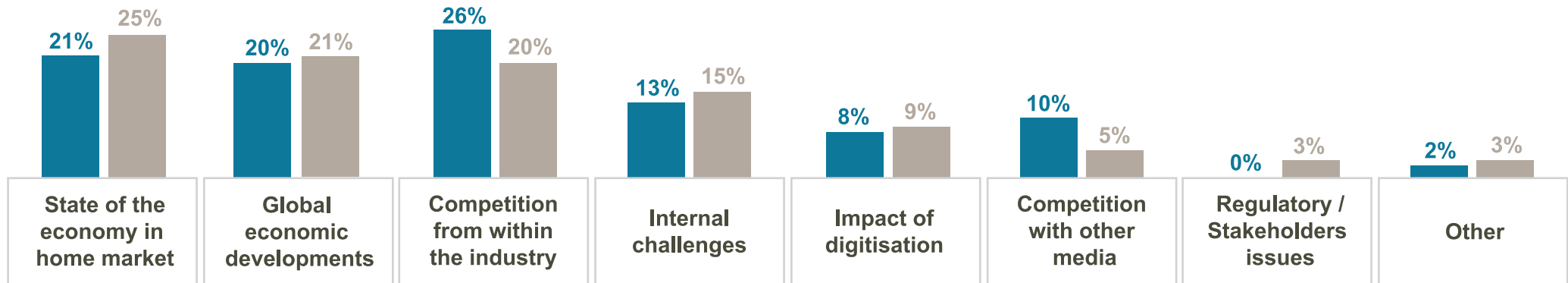
Detailed results for China (21 answers)



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

China

Global



Digitisation: implementation in China and globally

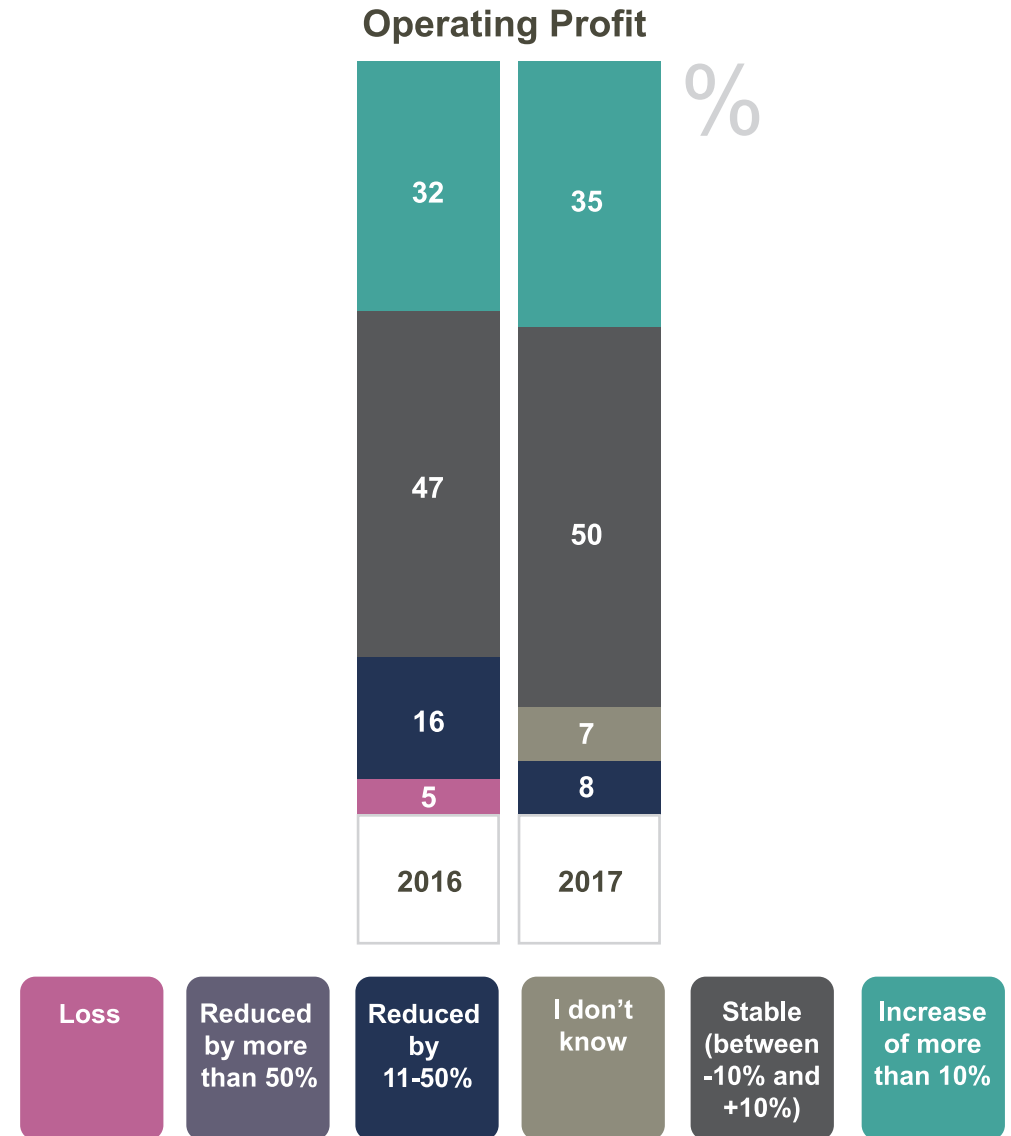
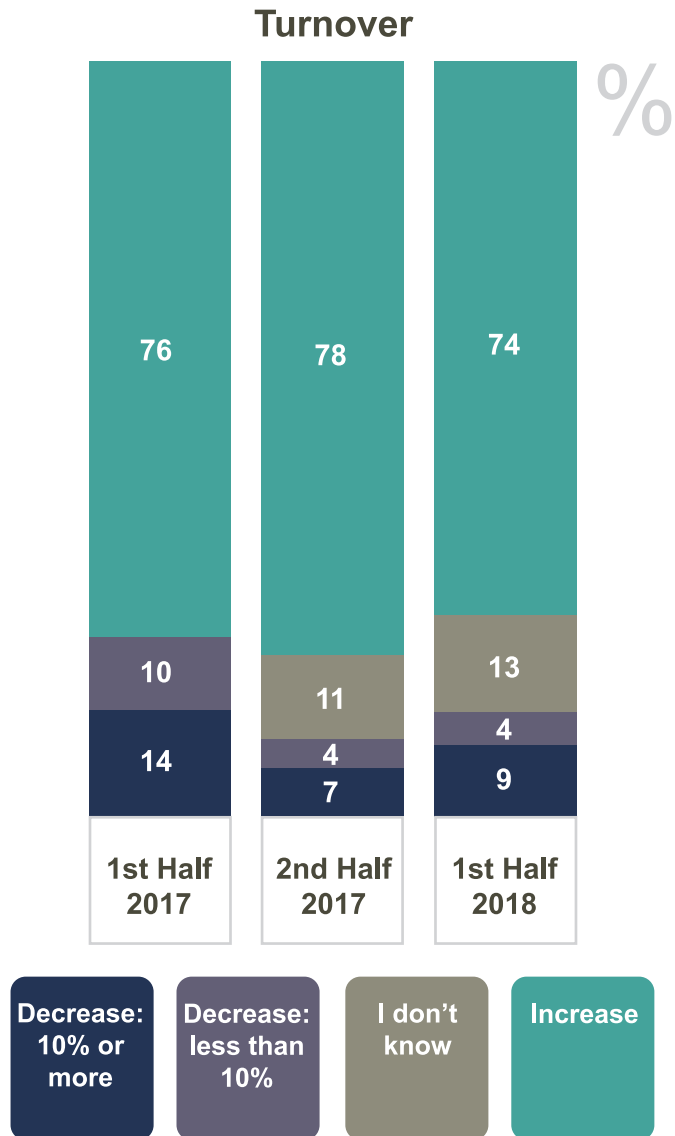


Top answer globally

Detailed results for India (37 answers)



Financial expectations of Indian exhibition companies compared to previous years



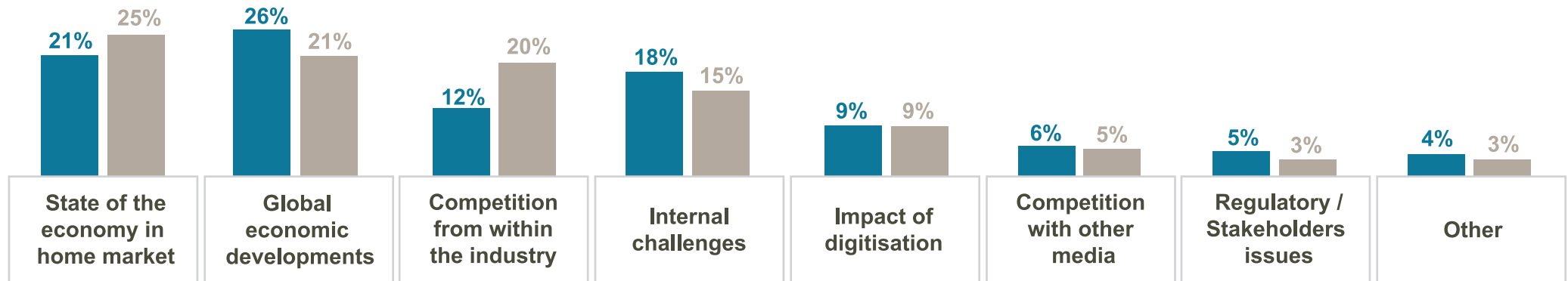
Detailed results for India (37 answers)



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

India

Global



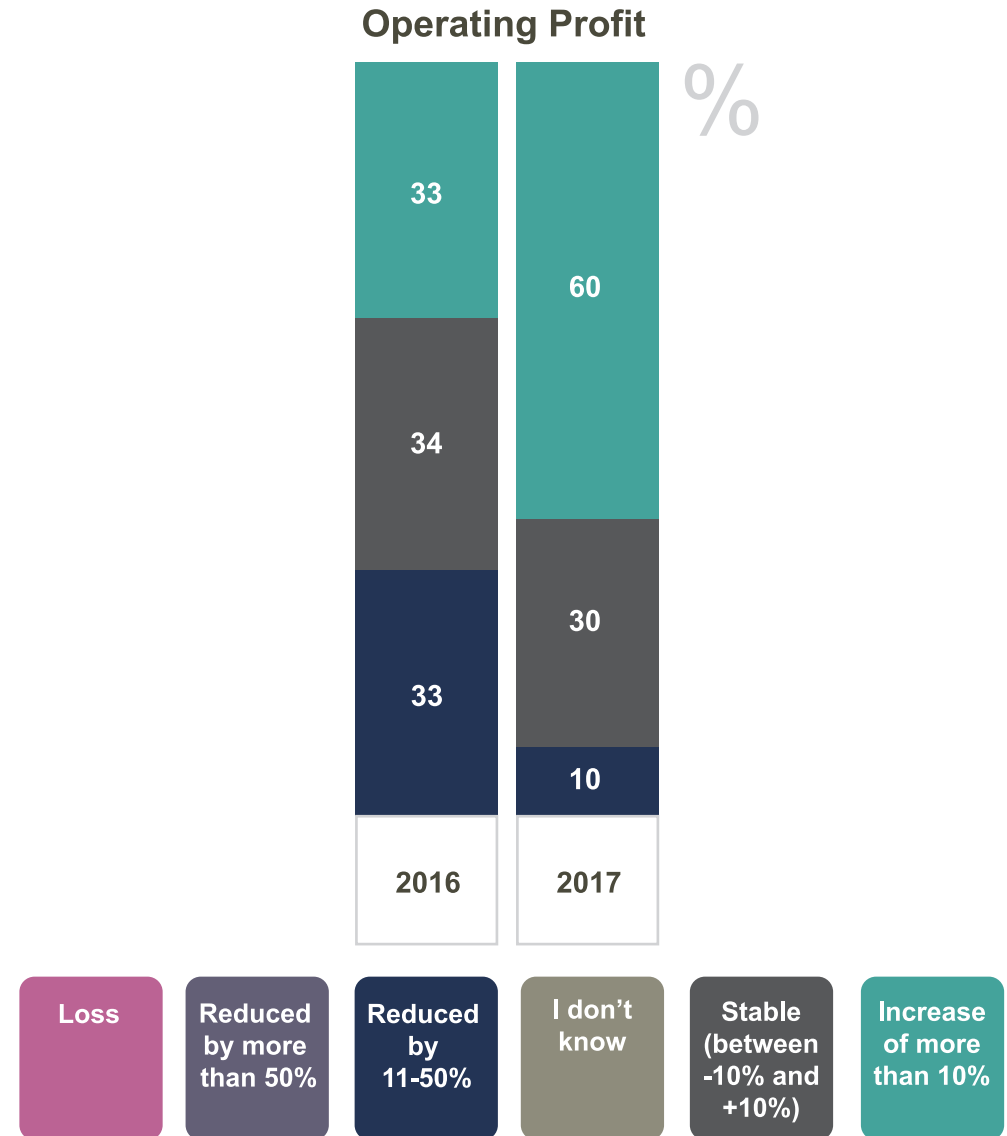
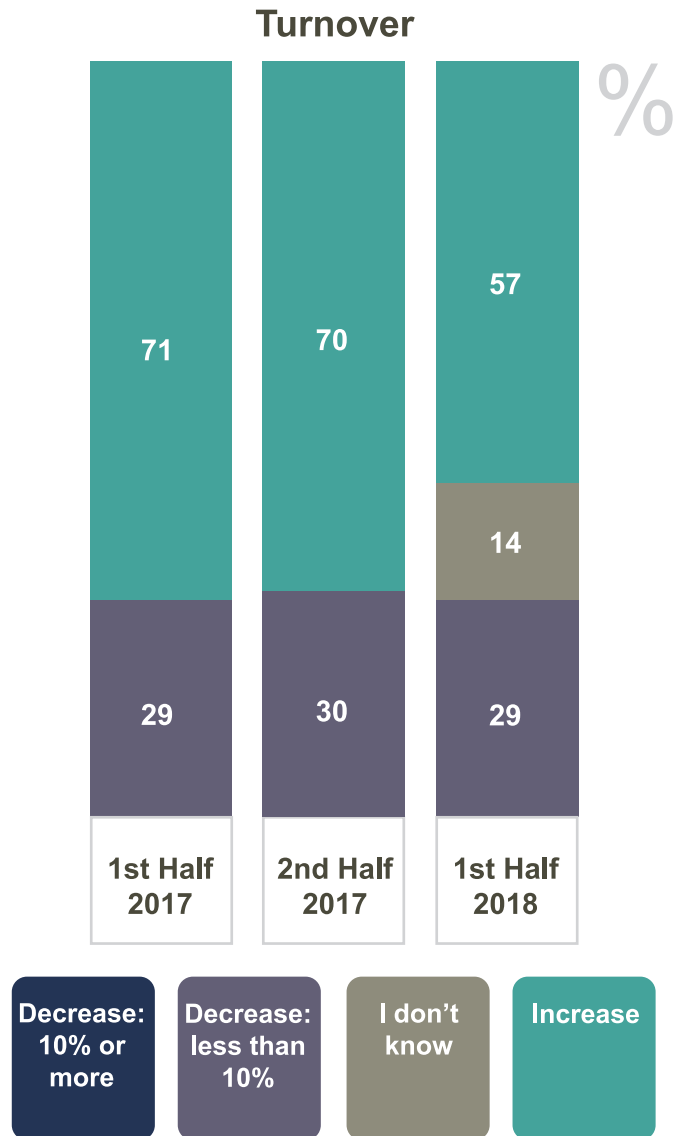
Digitisation: implementation in India and globally



Detailed results for Thailand (11 answers)



Financial expectations of Thai exhibition companies compared to previous years

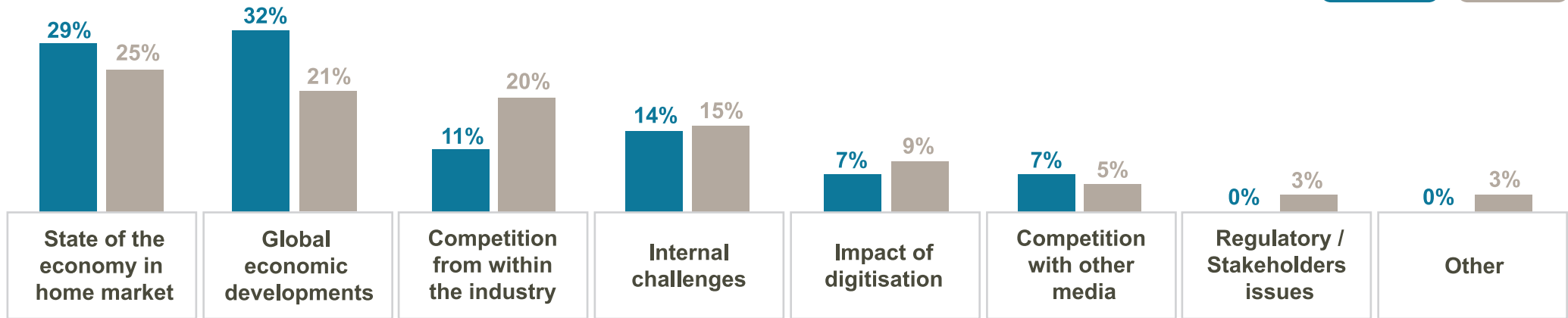


Detailed results for Thailand (11 answers)

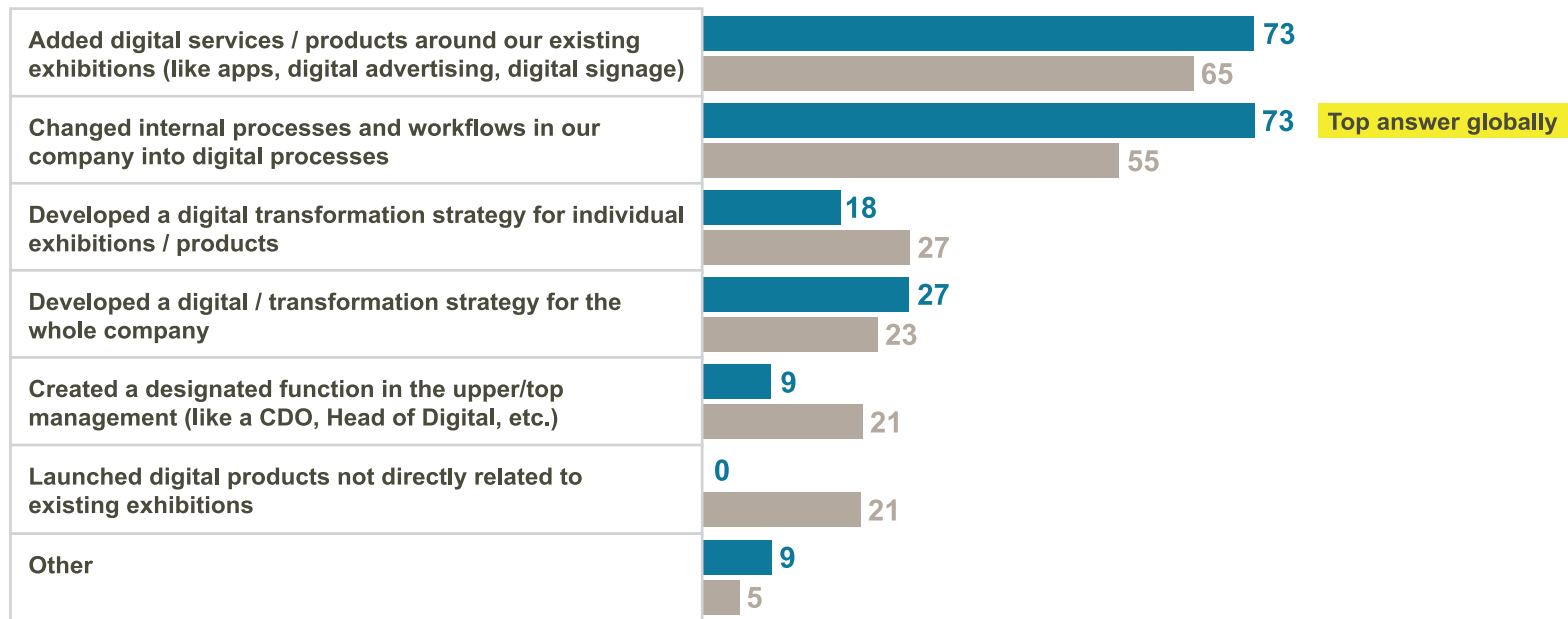


Most important business issues in the exhibition industry in Thailand and globally

Thailand Global

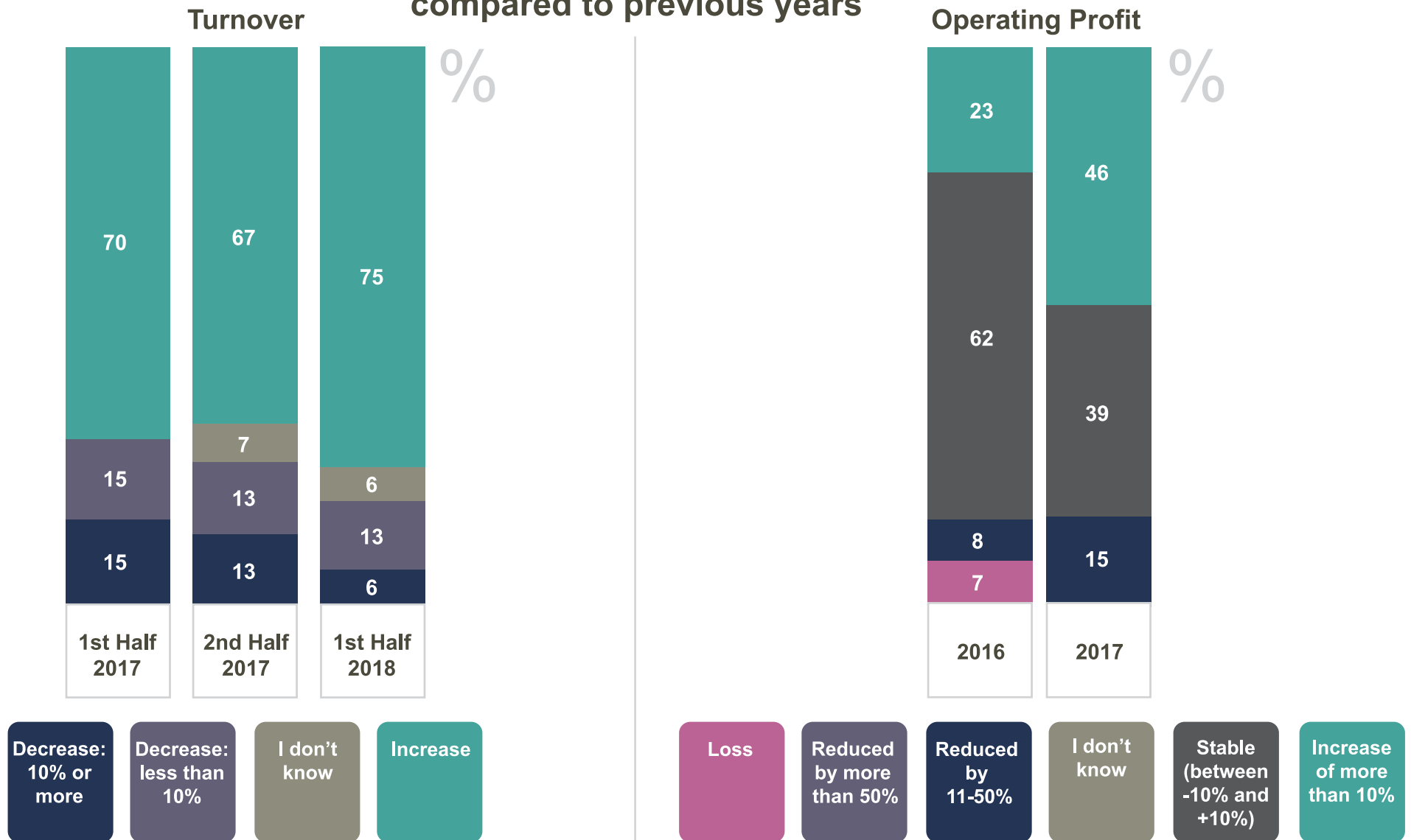


Digitisation: implementation in Thailand and globally



Detailed results for other countries in Asia – Pacific (17 answers)

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

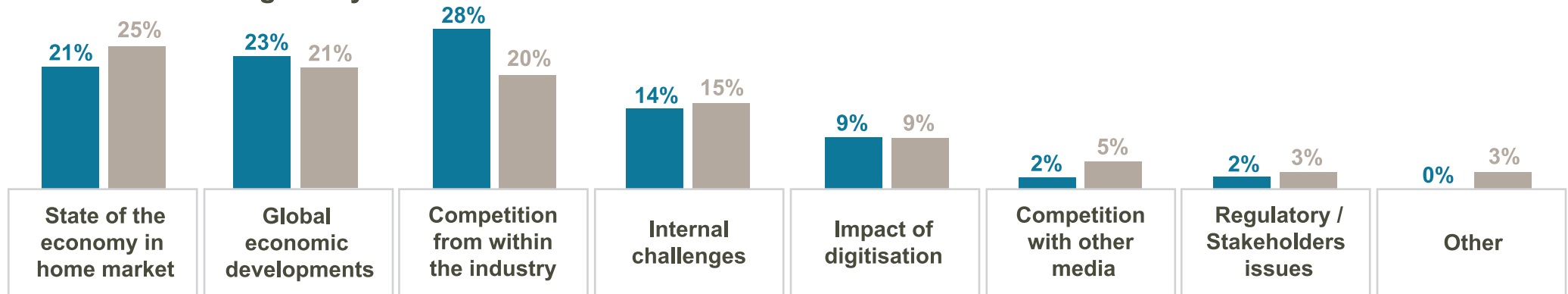


Detailed results for other countries in Asia – Pacific (17 answers)

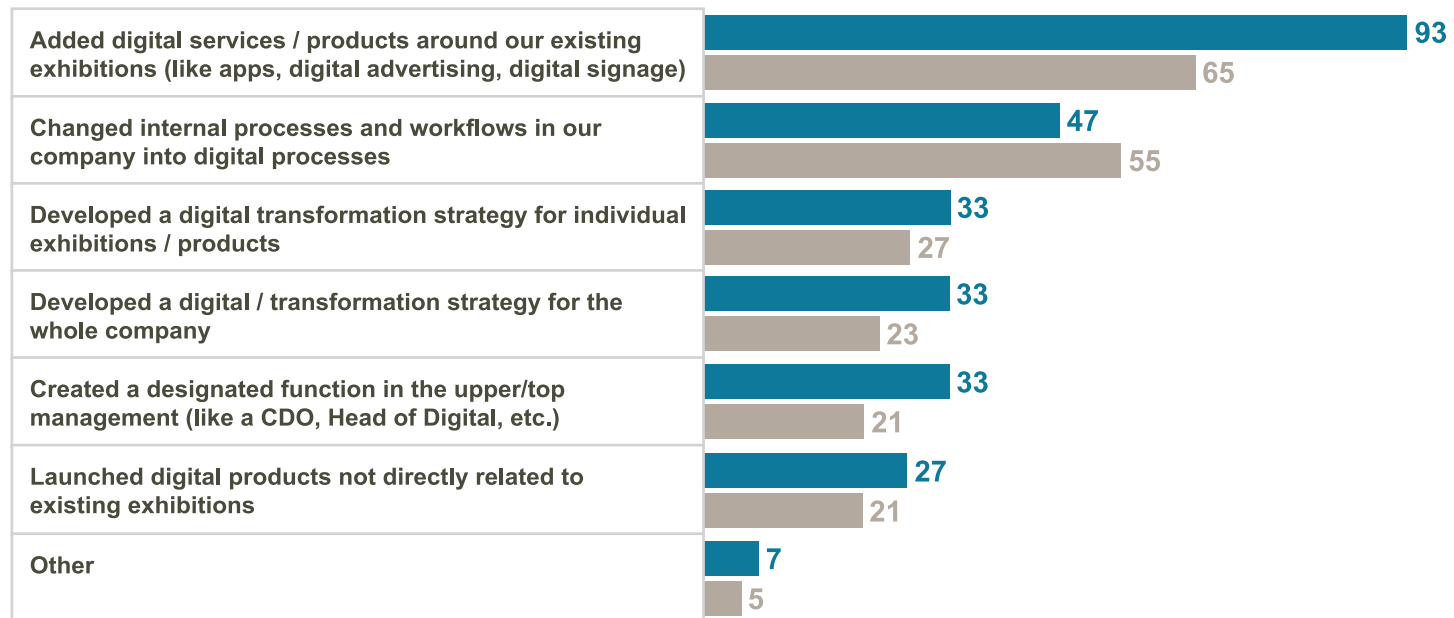
Most important business issues in the exhibition industry for other countries in Asia – Pacific and globally

Asia - Pacific

Global



Digitisation: implementation in Asia - Pacific and globally



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. The 19th survey, conducted in June 2017, was answered by 257 companies from 56 countries. The results are detailed for 14 geographical zones, including 10 major national markets. Survey results reveal very positive trends at different levels:

- Regarding **turnover** for the two halves of 2017 and the first half of 2018, at least 74% of respondents in Asia - Pacific and Europe declared an increase for these periods. In the Americas and the Middle East - Africa, the results were a bit less positive: on average for the three semesters, 66% of respondents in the Americas reported increases in turnover and 58% of respondents in Middle East - Africa. The reported turnover across these regions was, however, not always stable as the Americas reported a peak for the second half of 2017 and the Middle East - Africa reported a drop in the second half of 2017;
- In terms of **operating profit**, most regions maintained a good level of performance in 2016, even though it was generally lower than the level recorded in 2015. Moreover, profits for 2017 appear to be on the rise in all regions, except in the Middle East and Africa.
- When asked about their **top business issues**, the “state of the national/ regional economy” was considered most important, with 25% of all respondents naming this as a top business issue, and also most major exhibition markets. “Competition from within the industry” was considered a top business issue by 21% of survey respondents. Companies indicated that “global economic development” was less important than it had been in previous surveys, with 20% of respondents naming this as a top issue. Regarding additional top issues, “Internal Challenges” and “Impact of digitisation” take the next places.

- Finally, a majority of companies have responded to the accelerating **process of digitisation in the exhibition industry**. The two actions most frequently undertaken were “Added digital services/products around existing exhibitions (i.e.: apps, digital advertising, digital signage) and “Changed internal processes and workflows in our company into digital processes” with respectively 65% and 55% of respondents having implemented these actions.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!

THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN DECEMBER 2017 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 257 (in 56 countries)

North America	30	Europe	75	Middle East	18
Canada	3	Austria	1	Iran	8
Mexico	12	Belgium	1	Jordan	1
USA	15	Croatia	1	Kuwait	1
		Czech Republic	1	Lebanon	1
		France	2	Oman	2
Central & South America	22	Georgia	1	Qatar	1
Argentina	3	Germany	15	Saudi Arabia	2
Bolivia	1	Greece	1	UAE	1
Brazil	11	Hungary	2	United Arab Emirates	1
Chile	1	Italy	6		
Colombia	3	Luxembourg	1	Asia - Pacific	86
Cuba	2	Netherlands	2	Australia	4
El Salvador	1	Poland	2	China	21
		Portugal	2	India	37
		Romania	1	Japan	2
Africa	26	Russian Federation	13	Malaysia	1
Egypt	1	Slovenia	1	New Zealand	1
Libya	1	Spain	1	Philippines	1
South Africa	22	Sweden	4	Singapore	5
Sudan	1	Turkey	4	South Korea	3
Morocco	1	Ukraine	2	Thailand	11
		United Kingdom	11		

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