

UFI Global Exhibition Barometer

ufi The Global Association of the Exhibition Industry

34th Edition

Report based on the results of a survey concluded in January 2025



Global



South Korea



Malaysia



Greece



Southern Africa



Mexico



Myanmar



Thailand



Australia



Argentina



Saudi Arabia



France



Brazil



Panama



Singapore



Italy



Indonesia



US



United Kingdom



Uruguay



Spain



Hong Kong



Asia



India



Peru



Japan



Central & South America



Macau



Colombia



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.

United Nations Sustainable Development Goals – Report on the economic, social & environmental impacts of a number of exhibition industry projects.

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.

The Exhibition Industry in Latin America – The first comprehensive overview by UFI of the exhibition industry Latin America.

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.

Special Industry Topics – A wide ranging selection of bespoke reports into specific industry topics.

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Welcome to the 34th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey concluded in January 2025. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 19 specific markets and regions. The UFI Global Exhibition Barometer was launched in response to the 2008 global financial crisis. Since then, it has tracked industry development through various external shocks (the most recent being the COVID-19 pandemic). As a globally trusted, independently run research project, this latest edition again identifies and lists today’s and tomorrow’s industry challenges.

The Barometer has a truly global reach, with 390 companies participating from 56 countries and regions.

We wish to thank the following associations, whose participation made this global collaboration possible: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, ABEA (Australian Business Events Association) in Australia, ABEOC (Associação Brasileira de Empresas de Eventos) and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil, AEFI (Italian Exhibition & Trade Fair Association) in Italy, AEO (Association of Event Organisers) in the UK, AFE (Spanish Trade Fairs Association) in Spain, AFECA (Asian Federation of Exhibition & Convention Associations) in Asia, AFEP (Asociación de Ferias del Peru) in Peru, AFIDA (Asociación Internacional de Ferias de América) in Central & South America, AIFEC (Asociación Colombiana de la Industria de Ferias, Congresos, Convenciones y Actividades Afines) in Colombia, AKEI (The Association of Korean Exhibition Industry) in South Korea, AMEREF (Asociación Mexicana de Recintos Feriales) and AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, AOCA (Asociación Argentina de Organizadores y Proveedores de Exposiciones, Congresos, Eventos y de Burós de Convenciones) in Argentina, APPCE (Asociación Panameña de Profesionales en Congresos, Exposiciones y Afines) in Panama, AUDOCA (Asociación Uruguaya de Organizadores de Congresos y Afines) in Uruguay, HKECIA (Hong Kong Exhibition and Convention Industry Association) in Hong Kong, IECA/

ASPERAPI (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, MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia, MECA (Myanmar Exhibition and Conference Association) in Myanmar, PEIFE (Professional Events Industry Association Saudi Arabia) and SCEGA (Saudi Conventions & Exhibitions General Authority) in Saudi Arabia, SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, SOKEE (Greek Exhibition Industry Association) in Greece, TEA (Thai Exhibition Association) in Thailand, and UNIMEV (French Meeting Industry Council) in France.

Important remarks

- The number of responses to the current survey (390 total from 56 countries and regions - see the full list at the end of the document) provides strong results capturing and describing major issues and trends as a barometer. However, the nature of the exercise – a survey towards a broad sample of companies from the industry - means that some results cannot claim to necessarily be fully representative. Also, since weighting of answers based on the size of the responding company or its national market is not possible, it shall be noted that some regional or global consolidations, especially quantitative results, are not as accurate as the ones for the detailed markets. Whenever felt required, this is mentioned in the texts that accompany the charts.
- Due to decimal rounding, the percentage values indicated in some charts may not sum up exactly to 100%.

Questions related to this survey can be sent to research@ufi.org

This research can be downloaded for free at www.ufi.org/research



The 34th Barometer surveyed participants' company operations for the second half of 2024 (compared to the year before), qualifying their level of activity as "increased," "normal," "reduced," or "no activity." It also gauged their predicted level of activity for the first half of 2025.

The 34th Barometer also asked organisers and venues to indicate the development in % of exhibition space rented in their home country between 2024 and 2019 (net space for organisers, gross space for venues).

Globally, the level of operations in the second half of 2024 has picked up for 6 companies out of 10 (and even 7 out of 10 in North America, but only 5 out of 10 in Asia-Pacific) compared to the year before.

This trend will continue in the coming year with, on average, a percentage of companies reporting an increased activity ranging from 71% in North America, 62% in Central and South America and in the Middle East and Africa, to 60% in Europe and 42% in Asia-Pacific respectively.

These averages include variations for some countries, and the level of increased activities is:

- Lower than the global averages for both periods in Australia, China, France, Greece and Thailand; in all those countries except China, there is still around 1 company out of 2 reporting an increase in activity. In China, this is the case for 3 companies out of 4, while 6 out of 10 declare the level of operations as normal for the second half of 2024 and 4 out of 10 for the first half of 2025
- Higher than the global averages in Argentina, Colombia, Germany, Italy, Mexico, Spain, South Africa, the UAE, the UK and the USA.

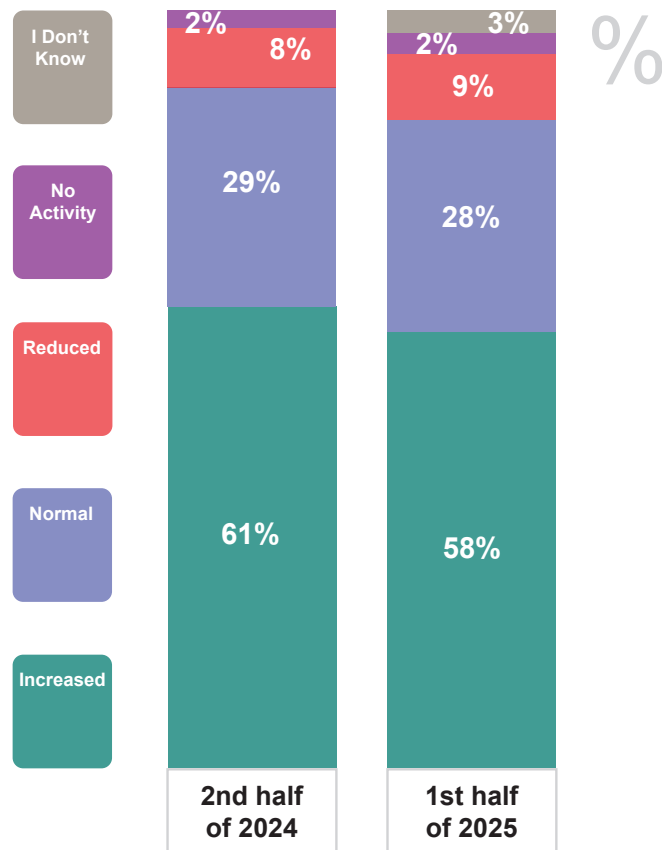
In terms of space rented, results show a global progression of 9% for 2024 compared with 2019. Respondents from all regions declare exceeding their pre-COVID-19 levels, with rates ranging from +2% in Europe to +9% in North America, +11% in the Middle East and Africa, +13% in Central and South America and +14% in Asia-Pacific.

Those global and regional consolidations need to be considered cautiously, as it should be noted that these averages include significant variations at the country level, especially for some of the major global markets:

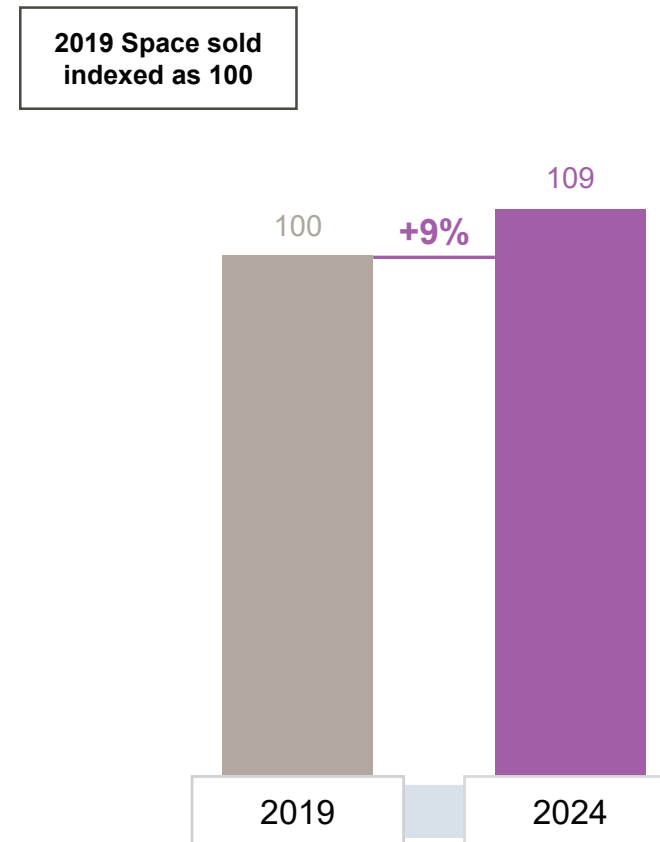
- 5 countries have lower or comparable levels to 2019: Germany (-12%), China (-8%), France (-2%), Australia and the UK (same).
- 9 countries have higher levels than the global average: Mexico and Spain (+13%), Italy (+15%), Saudi Arabia (+17%), Brazil and the UAE (+18%), Malaysia (+22%), Argentina (+34%), and India (+40%).



Situation of the industry operations for the current year, and predictions for the next year



Exhibition space sold in 2024 compared to 2019





The 34th Barometer asked participants for their company's gross turnover for 2024 and their expectations for 2025 compared to the previous year. The survey also aimed to gather insights on the progression of operating profits for 2024 and 2025 compared to the preceding year. It shall be noted that the results do not consider inflation, which varies from one country to another.

The following charts present:

- Revenues from 2024 and projections for 2025 compared to the previous year respectively, on average for all companies.
- The evolution of 2024 and 2025 operating profits compared to the previous year respectively.

Revenues increased by 16% on average in 2024, and this trend is expected to continue. In 2025, revenues are expected to grow again by an average of 18% year on year.

These general trends vary from one country to another:

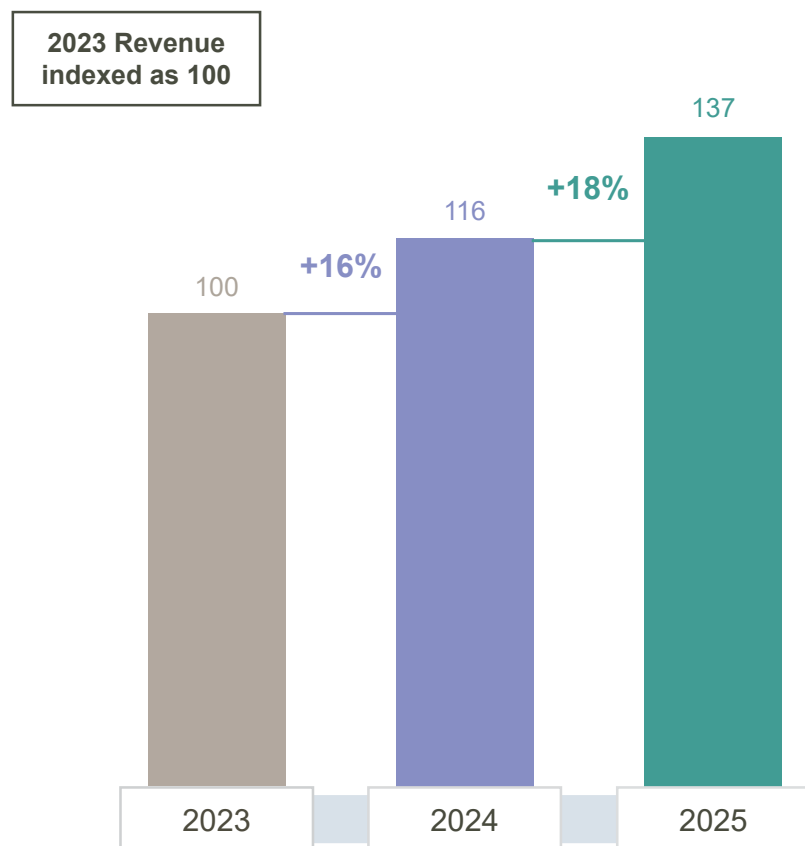
- Revenues from 2024 compared to 2023 increased by more than 20% in Argentina (+49%), Thailand (+30%), Mexico (+24%), Brazil (+23%) and Spain (+21%).
- Revenues from 2025 compared to 2024 are expected to increase by more than 20% in Argentina (+39%), the UK (+37%), Italy (+34%), Greece (+25%) and Colombia (+23%).

In terms of operating profits for 2024, 82% of the companies declare an annual increase of more than 10%, and 11% declare a decrease or a loss. Similar levels are anticipated for the 2025 operating profits, with 77% planning an annual increase of more than 10%, and 14% reporting a decrease or a loss.

In several markets, all respondents declared an increase of their operating profit by more than 10%: Australia (for 2024), France (for 2024), India (for 2025), Italy (for both 2024 and 2025), Mexico (for 2024), Spain (for 2024), South Africa (for 2025), the UAE (for both 2024 and 2025), the UK (for both 2024 and 2025), the USA (for both 2024 and 2025).

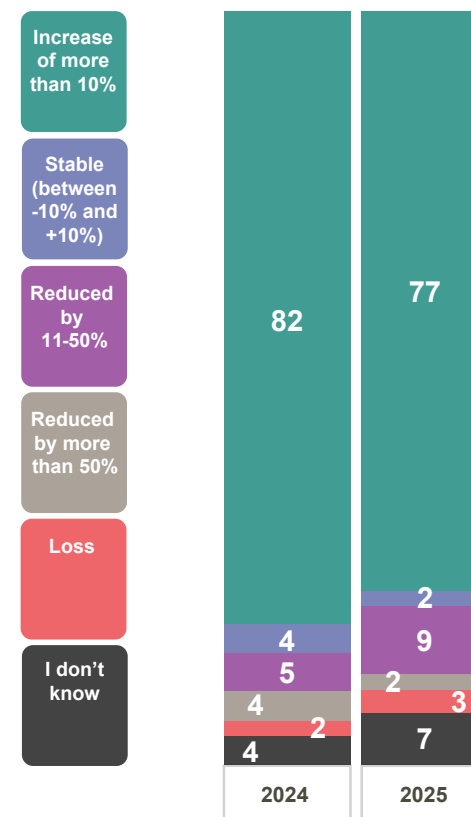


Revenue compared to previous year



Operating profits compared to the previous year

%





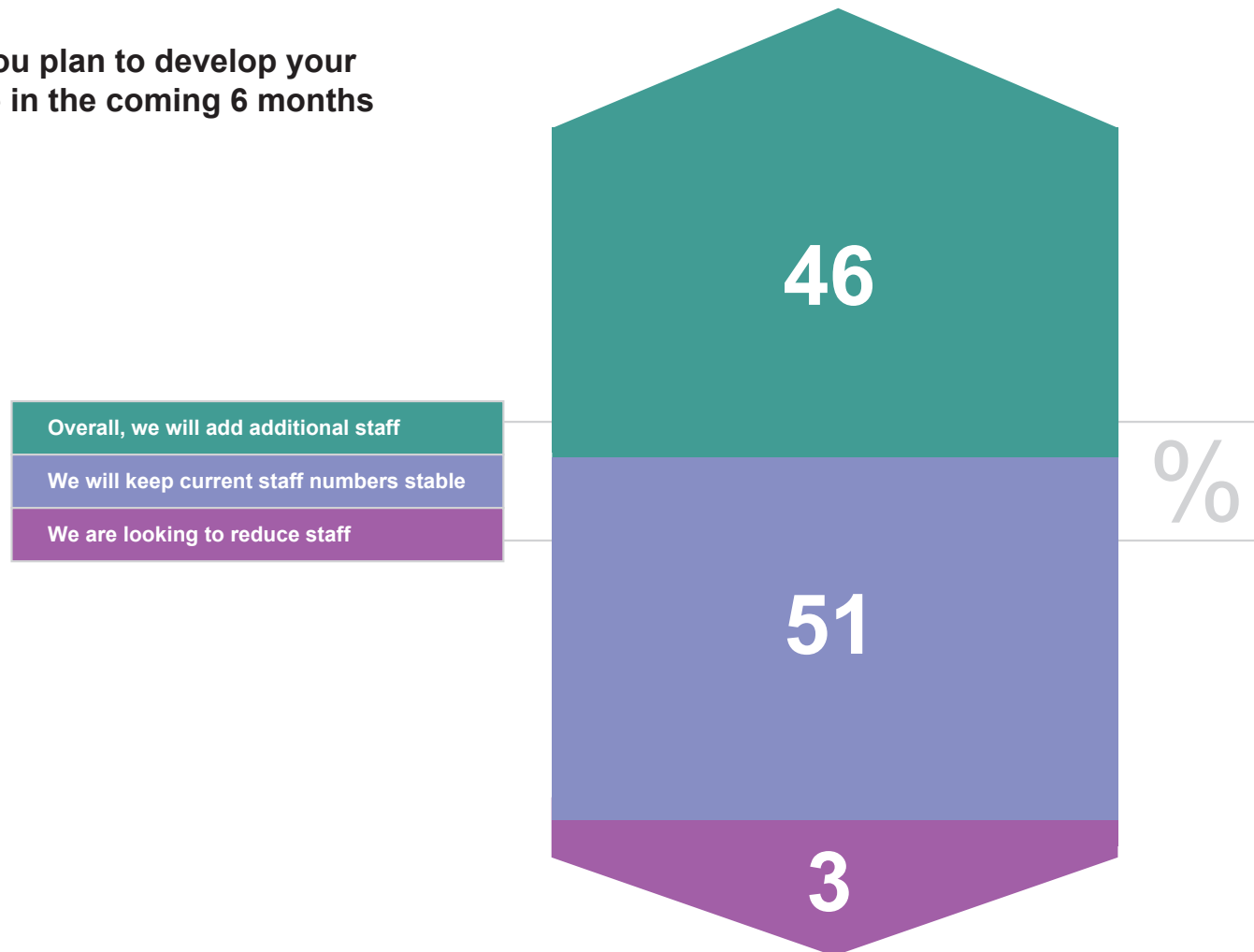
The 34th Barometer asked companies about their plans in terms of workforce development in the coming six months.

Globally, 46% of companies declare that they plan to increase their staff numbers, while another 51% declare that they will keep current staff numbers stable. Those levels follow similar positive ones measured six months ago (48% for both increase and stability).

The highest proportion of companies planning to add staff is identified in Saudi Arabia (100%), the UAE (86%), Malaysia (62%) and the UK (60%).



How do you plan to develop your workforce in the coming 6 months





The 34th Barometer asked companies to select the three most important issues for their business in the short term (12-18 months) and mid-term (3-5 years) from a pre-defined list of ten issues. This list included “Geopolitical challenges” for the third time, while in parallel the “Impact of COVID-19 pandemic on the business” was removed. The following pages present the results and include an analysis of the trend of answers to the short-term question, which has been asked over the last eight years (whereas the mid-term one is new in this edition).

For the short term:

- The most pressing business issues remains “State of the economy in home market” (23% of answers globally – 22% six months ago - and the main issue in all regions, except the Middle East and Africa, where it ranks second).
- “Geopolitical challenges” (16% of answers, compared to 14% six months ago, and the top issue for the Middle East and Africa) and “Global economic developments” (15%, same as six months ago) come in as the second and third most important issues globally.
- “Internal management challenges” (12%), “Competition from within the exhibition industry” (11%), followed by “Impact of digitalisation” and “Sustainability / Climate” (both 7%), and “Regulatory / Stakeholders issues” and “Competition with other media” (both 5%) follow.

An analysis by industry segment (organiser, venue only and service provider) shows no significant differences for this edition, except anticipated differences for “Global economic developments” (17% for organisers, but 14% for venues and 13% for service providers) and “Competition from within the exhibition industry” (10% for both organisers and venues, but 14% for service providers).

The analysis of the trends around top business issues over the 2016 - 2024 period, when combining the previous list into six categories, shows the exact same position as identified six months ago:

- “Global economic developments” and “State of the economy in the home market” are the main issues, with an aggregated 37% of answers.
- “Geopolitical challenges” introduced a year ago, and “Competition from within the exhibition industry” are both in second position, with 14% of answers, respectively. They are followed by “Sustainability / Climate” combined with “Other stakeholders’ issues” (13%).
- “Internal management challenges” stands next, with 11% of answers, half of what it represented in 2022 and 2023.
- “Impact of digitalisation” and “Competition with other media” combined have dropped from 30% or more in 2022 and 2023 to 9% in 2024.

For the mid-term:

There is an interesting change in ranking when comparing the most important issues in the short-term versus mid-term:

- “Global economic developments” is the top mid-term issue with 20% of answers (compared to the short-term issues, where it ranks third with 15% of answers).
- While “Geopolitical challenges” remains the second issue for both mid-term and short-term (with 15% and 16% of answers, respectively), “Sustainability / Climate” jumps to the third position for the mid-term (with almost the same level of 15% as the second one), compared to the seventh position on the short-term (with 7% of answers).

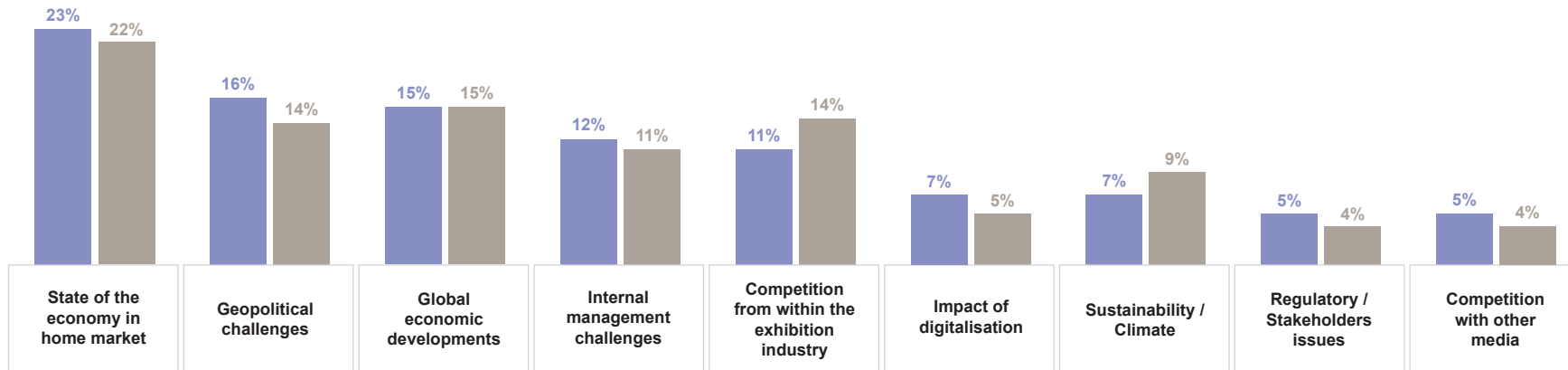
Most Important Business Issues World



Short term (12-18 months)

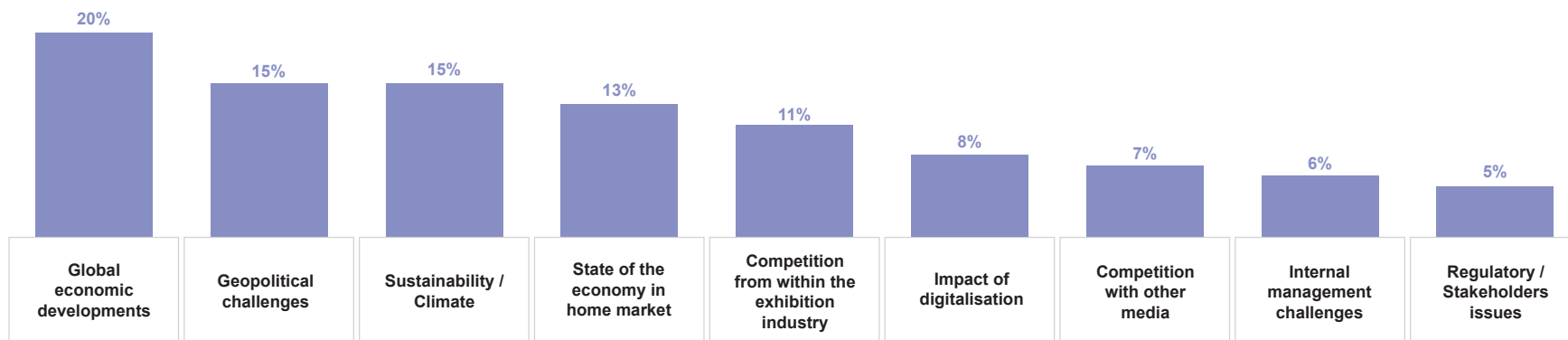
Results from current survey – January 2025

Results from previous survey – June 2024

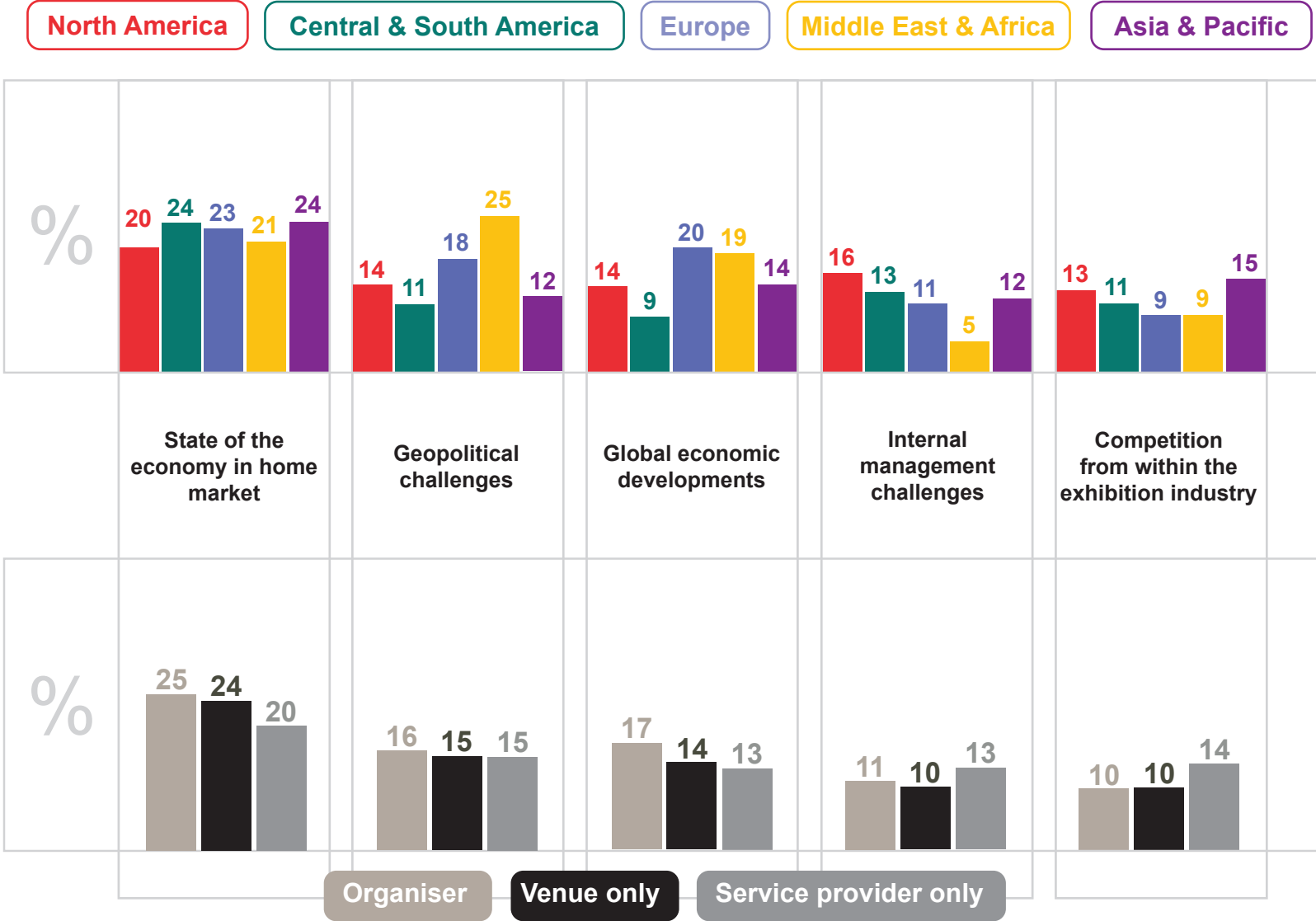


Mid-term (3-5 years)

Results from current survey – January 2025



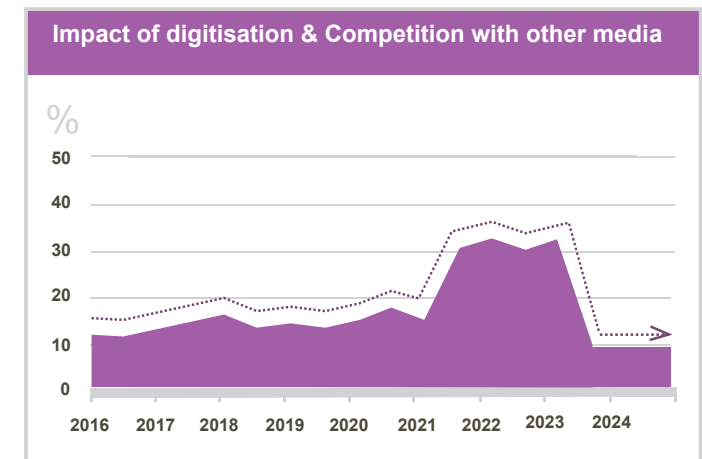
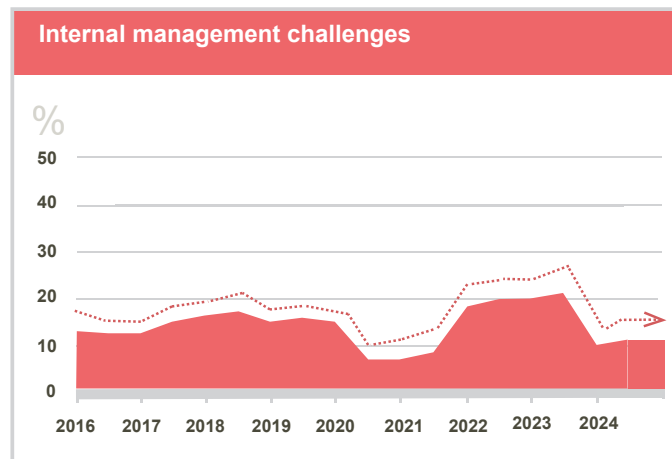
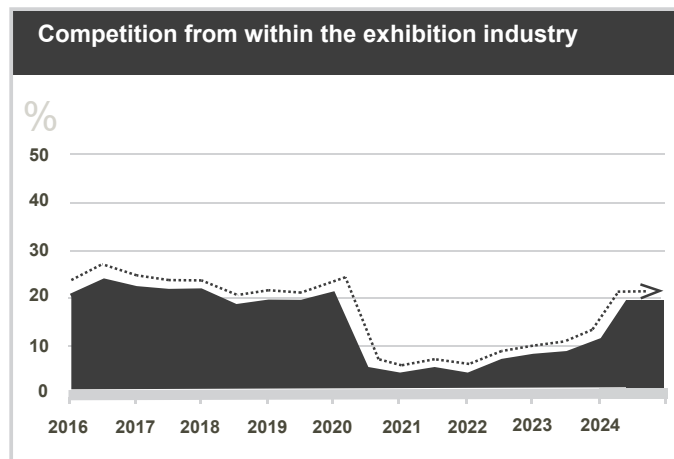
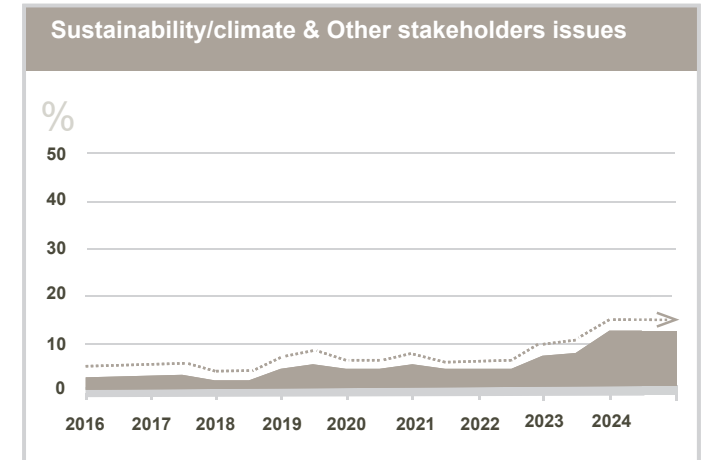
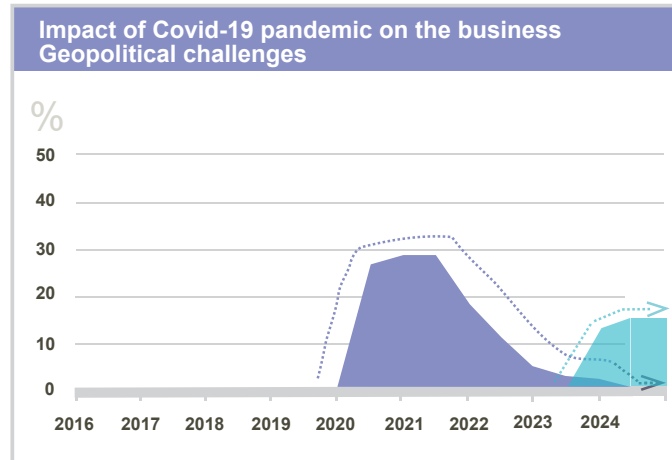
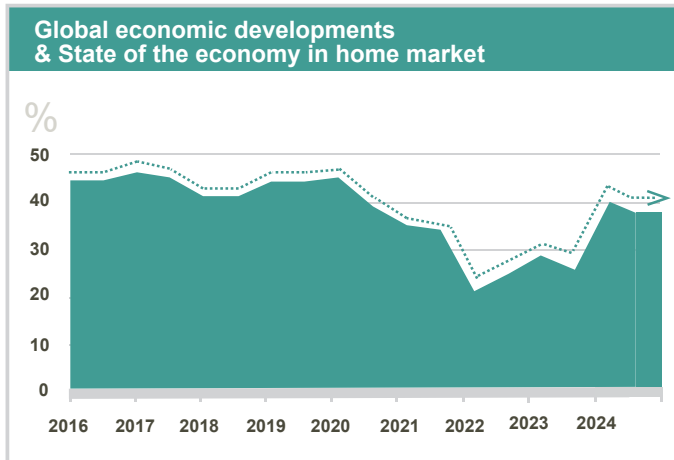
Most important short term issues: detail by region and type of activity for the five top issues identified globally



Most important short term Business Issues World



Most important business issues: 2016 - 2025 trends





The 34th Barometer survey asked a specific question on the impact of generative AI on the exhibition industry to shed light on this emerging digital transformation. The survey aimed to assess the current utilisation of AI across various business functions and gauge future expectations.

Globally, there is an overwhelming consensus that AI will affect the industry, with 92% of companies stating this (+5% compared to mid-2023 when we introduced the question).

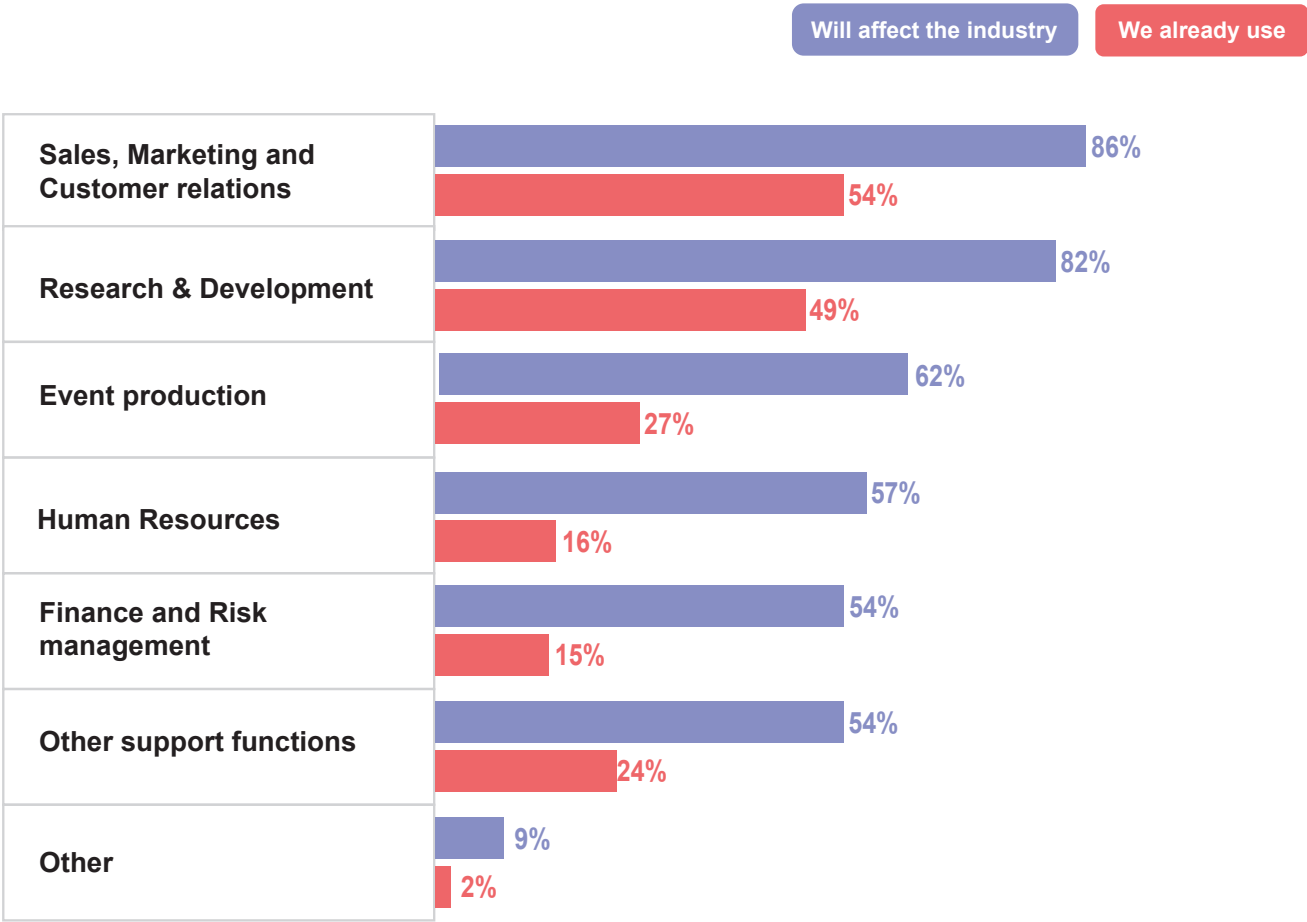
The two main areas expected to be most affected by the development of AI are the same in all regions: “Sales, Marketing and Customer relations” (86% globally) and “Research & Development” (82%). These are precisely the areas where generative AI applications are already mostly used and in all regions (54% and 49% globally, respectively), with a very fast recent rhythm of adoption:

- 54% globally for “Sales, Marketing and Customer relations”: +15% compared to six months ago, and +17% to a year ago.
- 49% globally for “Research & Development”: +11% compared to six months ago, and +14% to a year ago.

Other areas expected to be most affected by the development of AI are all selected by most companies for the time in the 3 successive surveys: “Event production” (62%), “Human Resources” (57%), “Finance and Risk management” and “Other support functions” (both 54%).



Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



Part 2: Detailed results for 5 regions and 19 markets

North America:

Mexico
US

Central & South America:

Argentina
Brazil
Colombia

Europe:

France
Germany
Greece
Italy
Spain
United Kingdom

Middle East & Africa:

Saudi Arabia
UAE
South Africa

Asia-Pacific:

Australia
China
India
Malaysia
Thailand

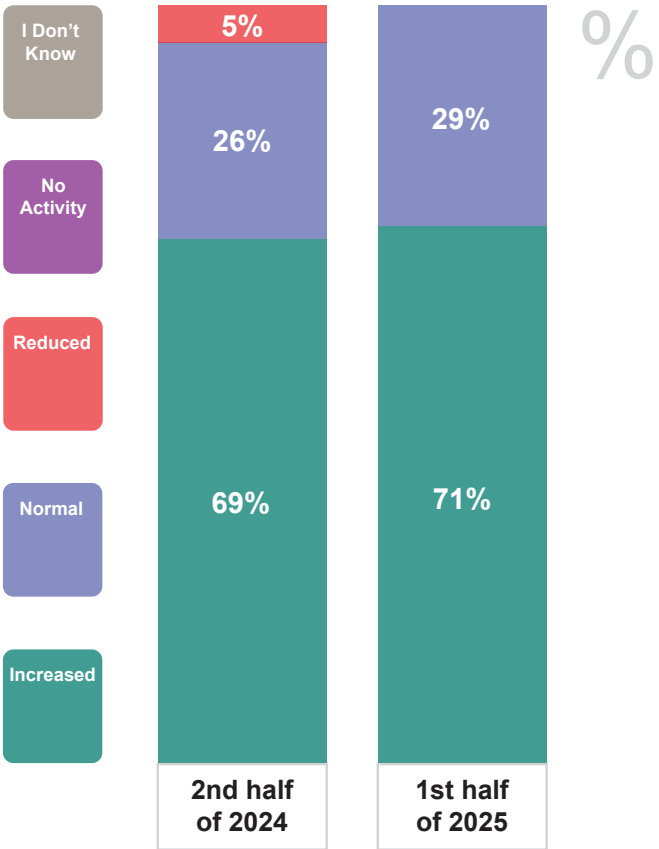
A network diagram consisting of several blue, semi-transparent circular nodes connected by thin, light blue lines. The nodes are arranged in a roughly diagonal line from the top-left to the bottom-right, with some branching connections. The background is a solid dark blue color.

North America

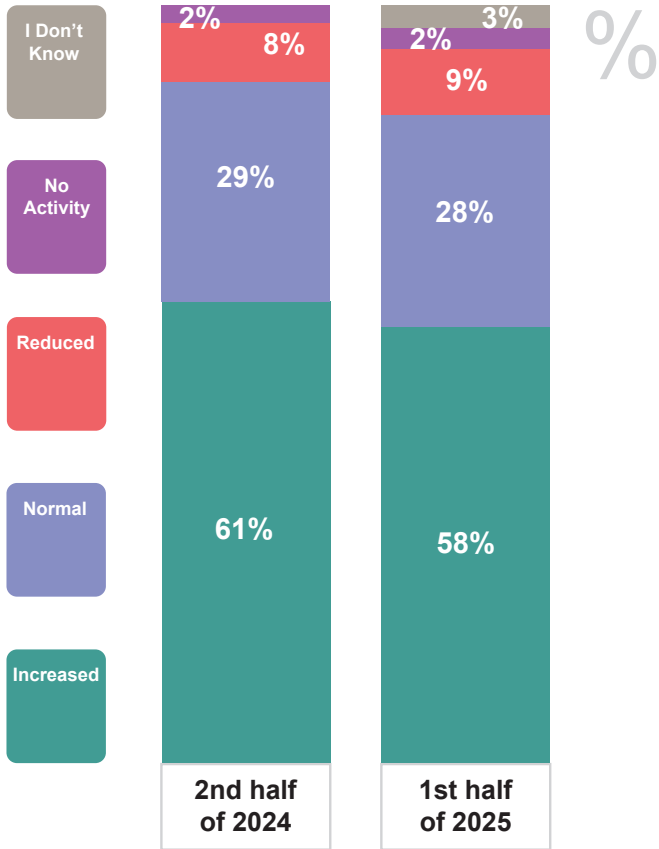


Situation of the industry operations for the current year, and predictions for the next year

North America



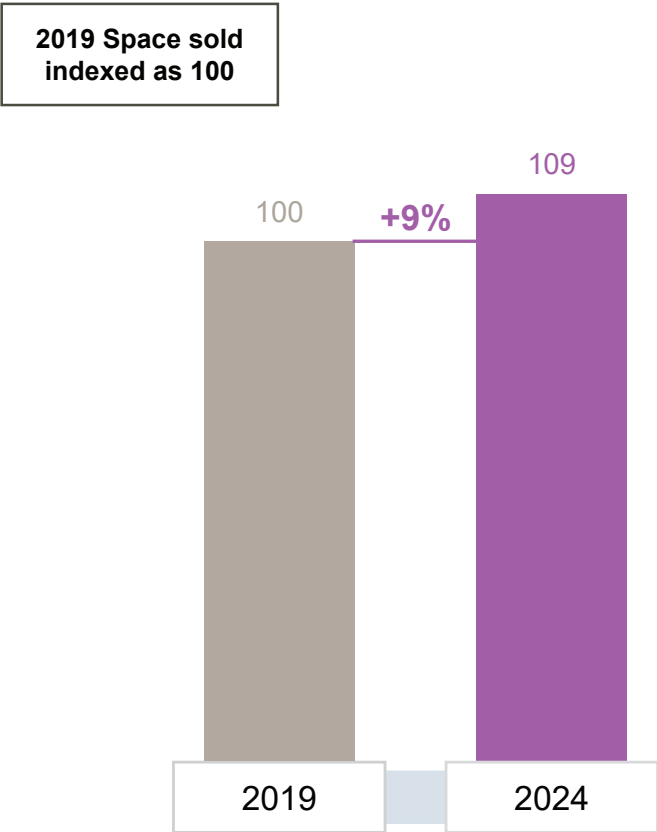
World



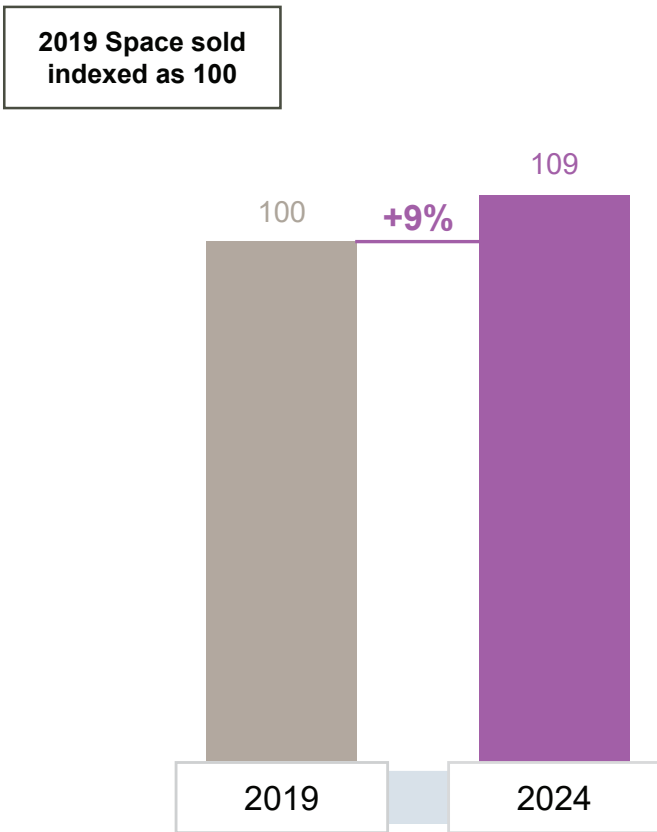


Exhibition space sold in 2024 compared to 2019

North America



World

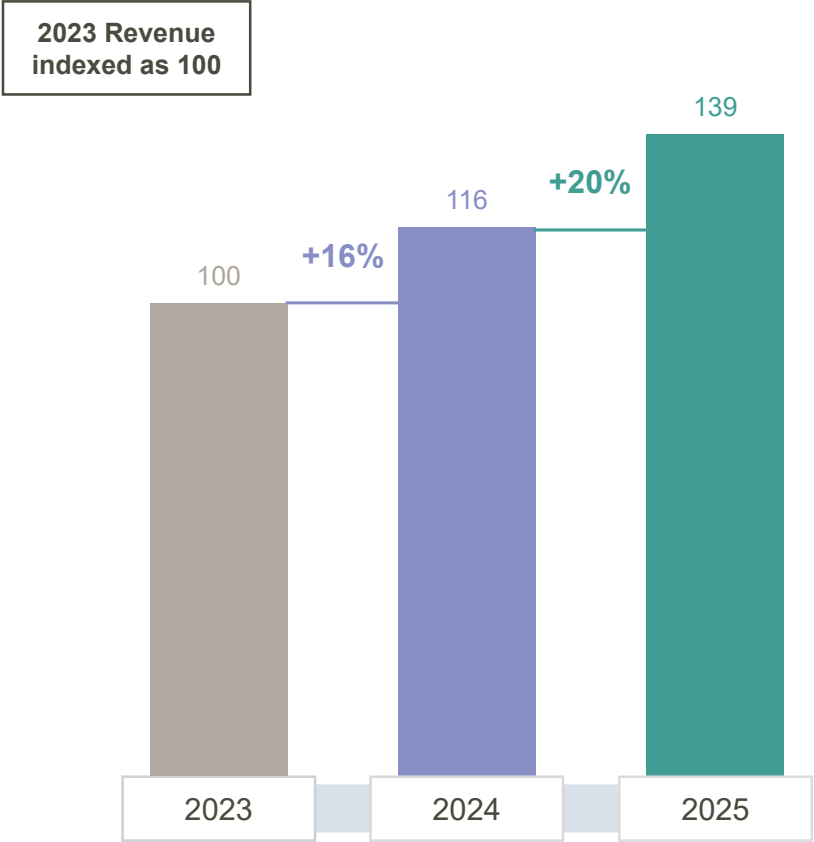


Turnover North America

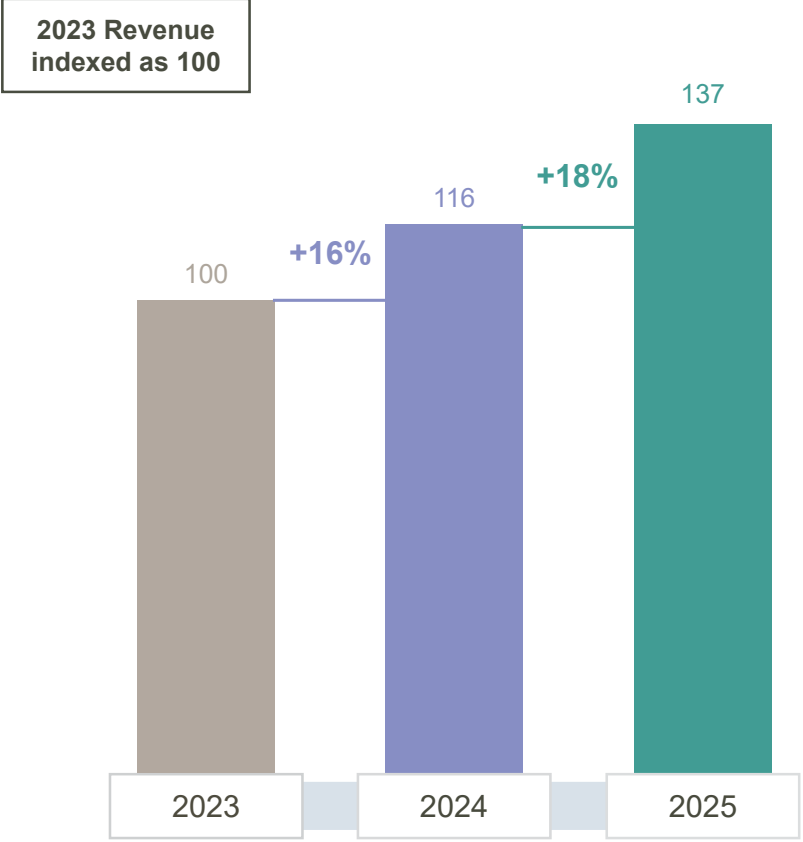


Revenue compared to previous year

North America



World

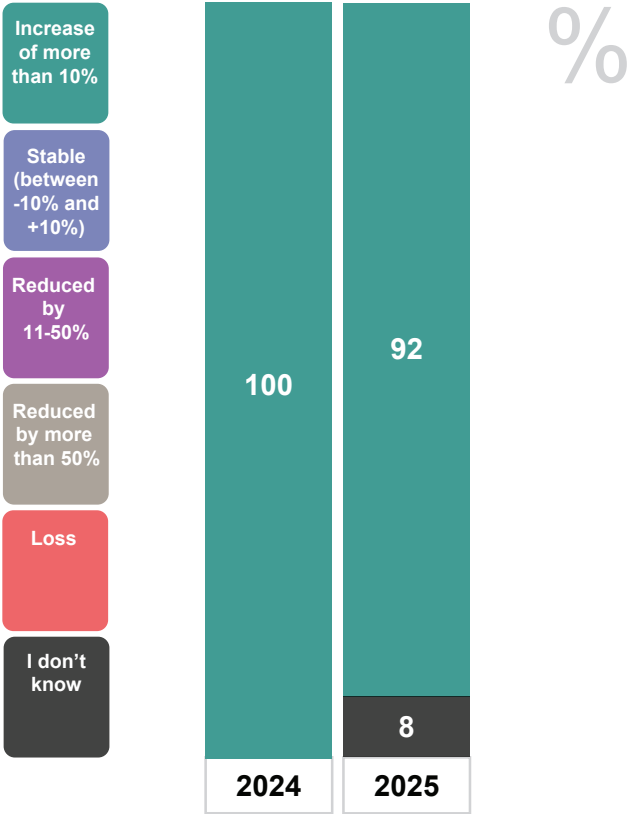


Operating Profits North America

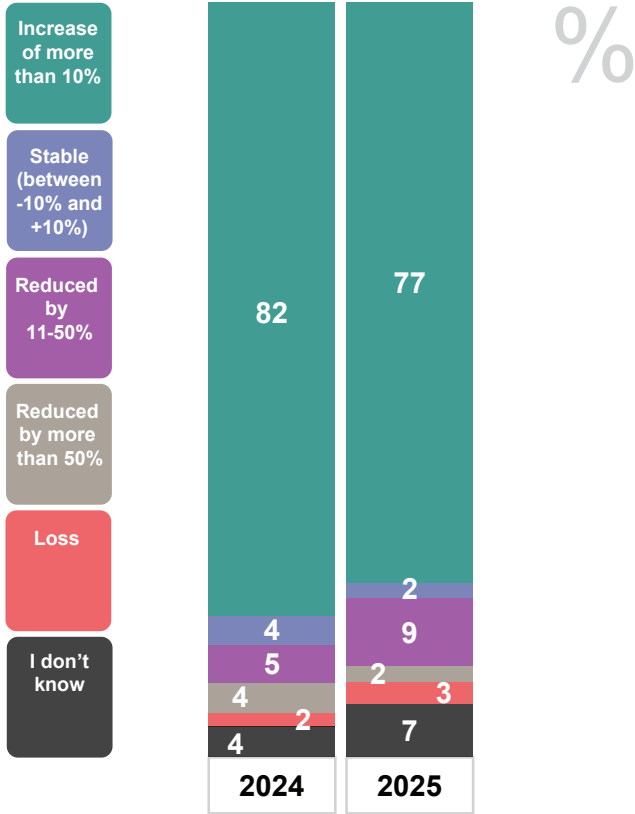


Operating profits compared to previous year

North America



World





How do you plan to develop your workforce in the coming 6 months



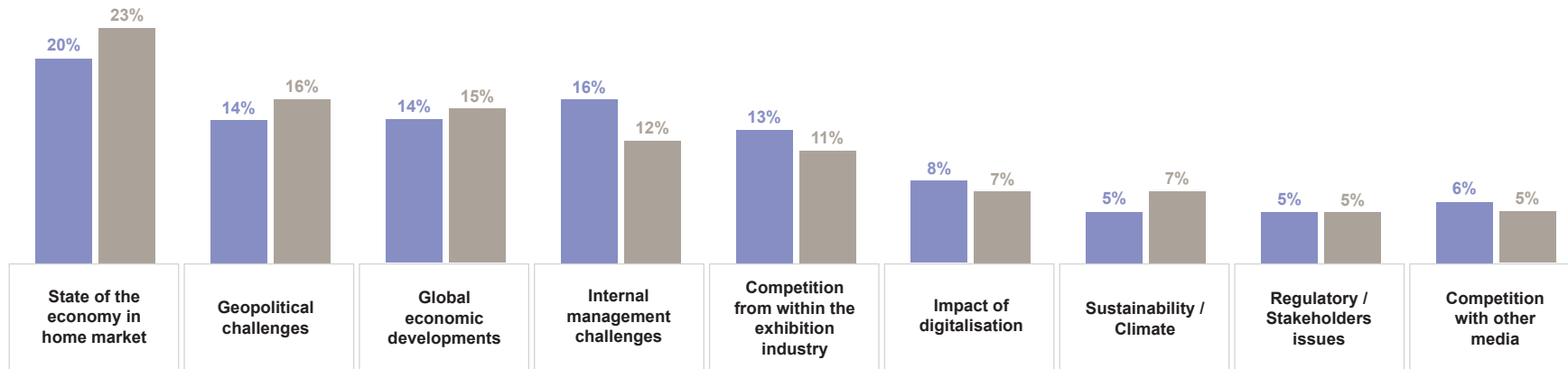
Most Important Business Issues - Key Factors for Business Development - North America



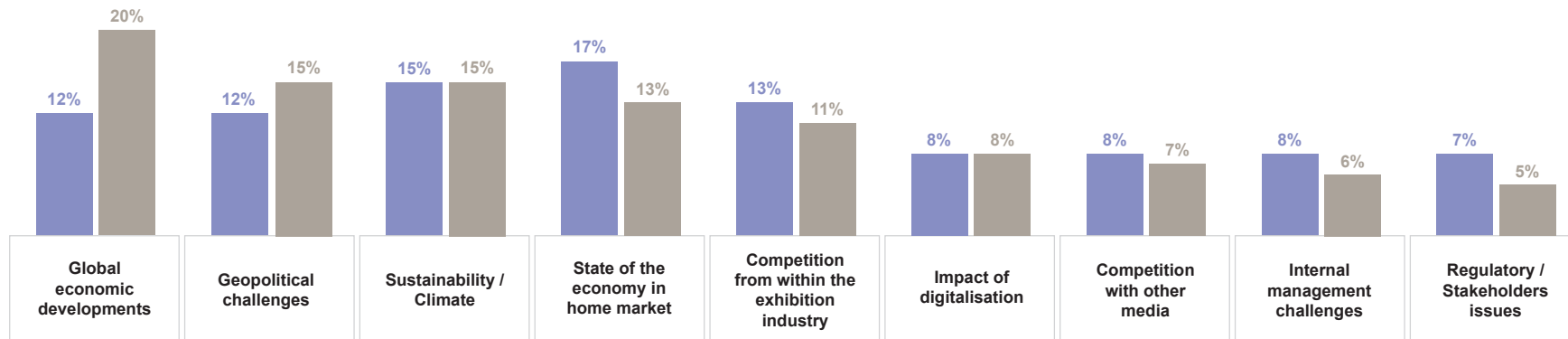
Most important business issues in the exhibition industry

Short term (12-18 months)

North America Global



Mid-term (3-5 years)



Generative AI Applications North America

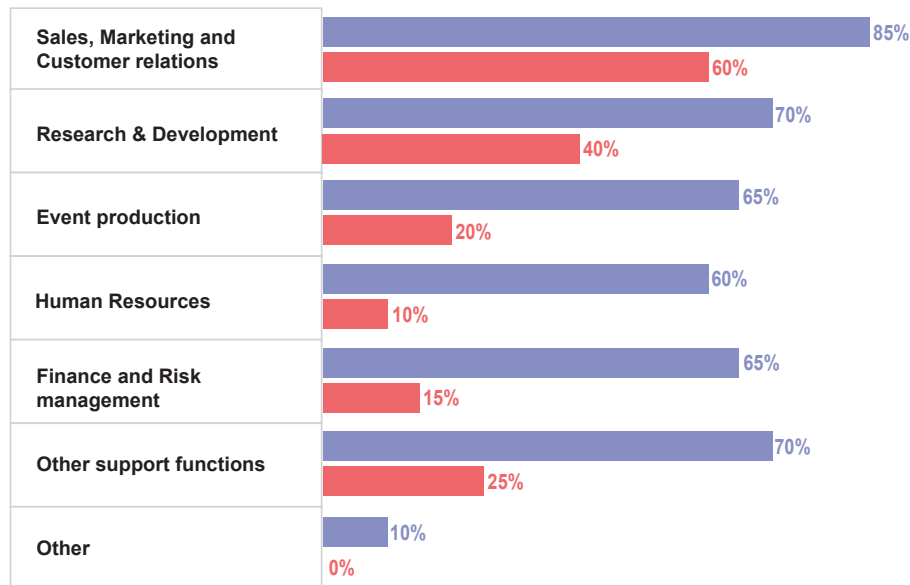


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

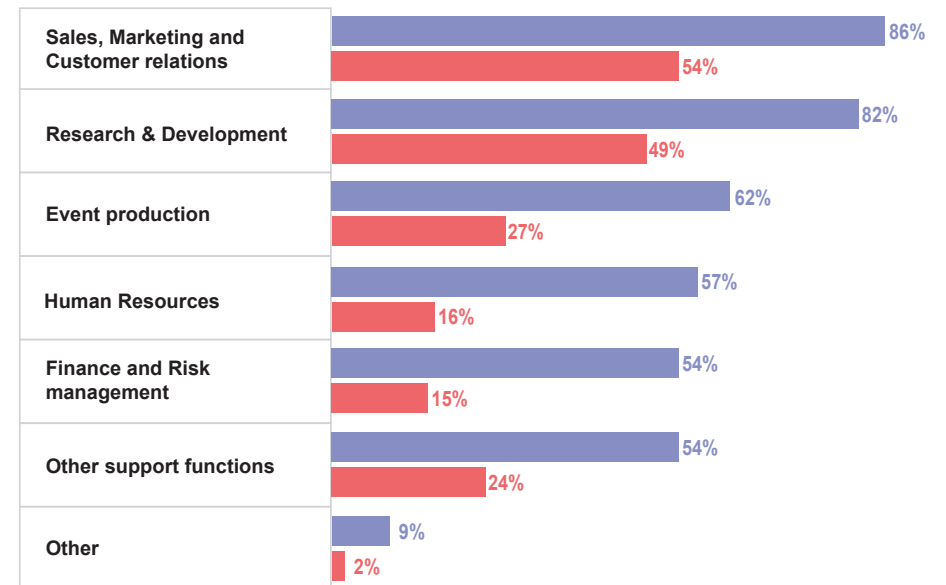
Will affect the industry

We already use

North America



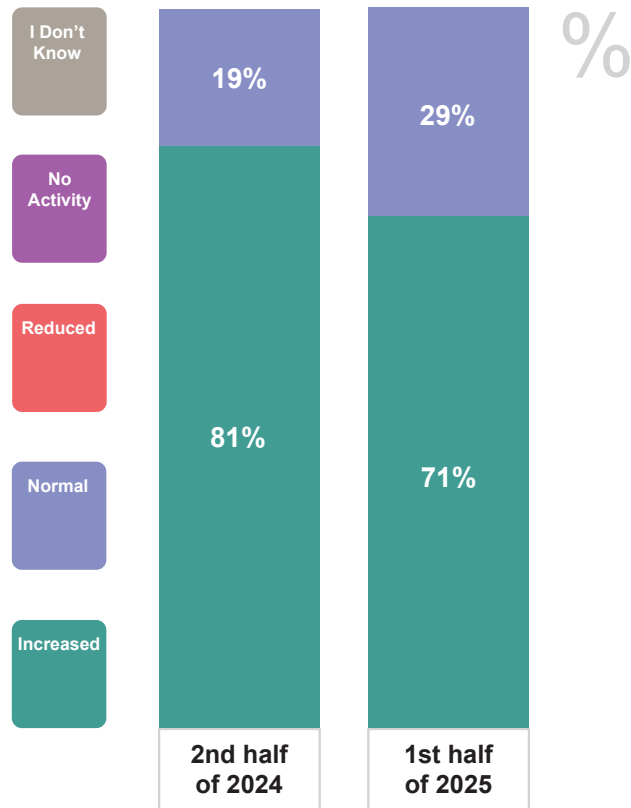
World



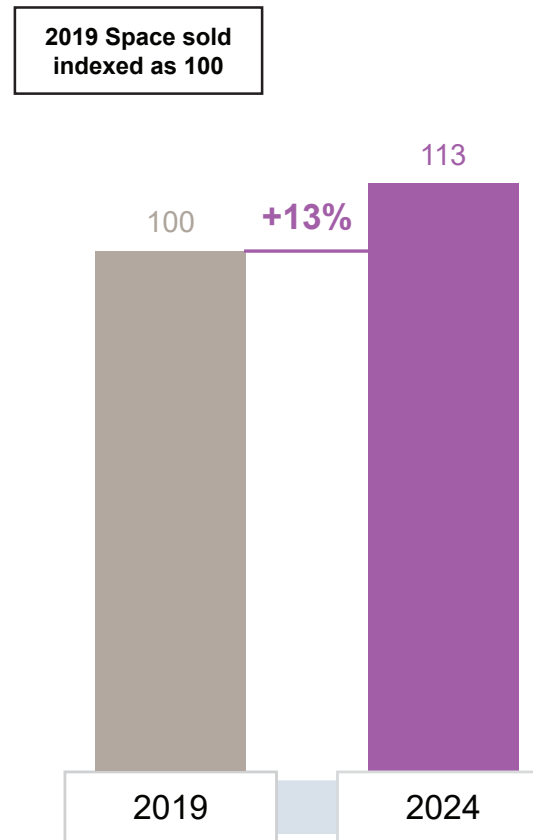
Detailed results for Mexico



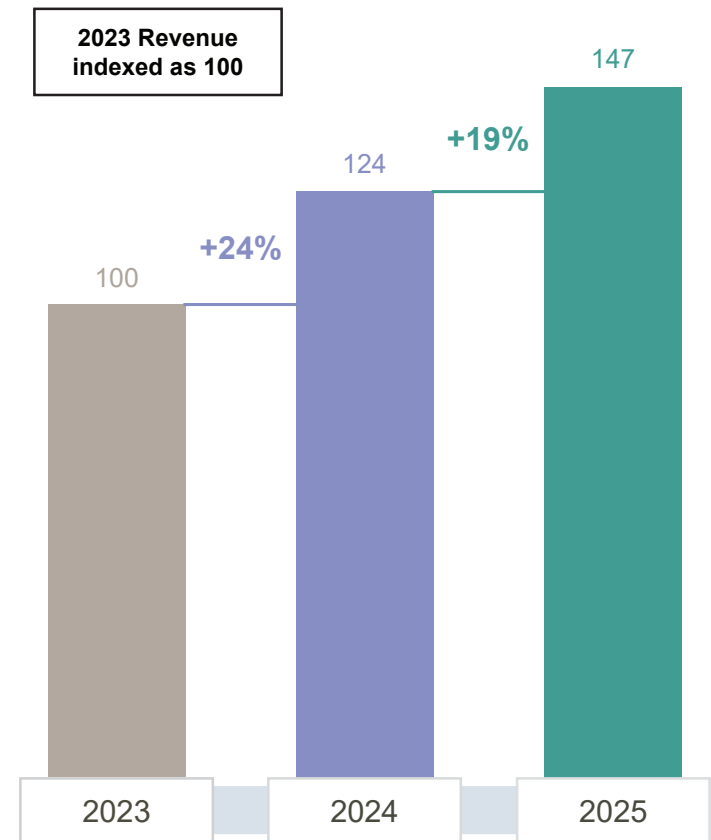
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



Revenue compared to previous year

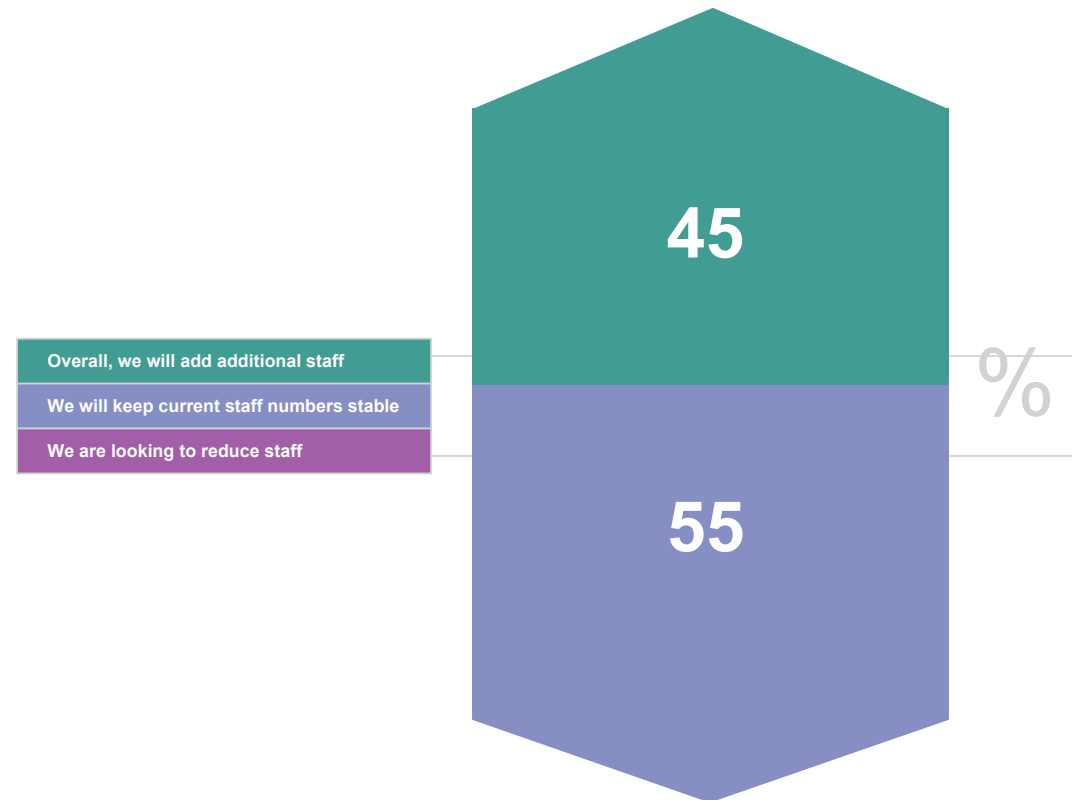




Operating profits compared to the previous year and others

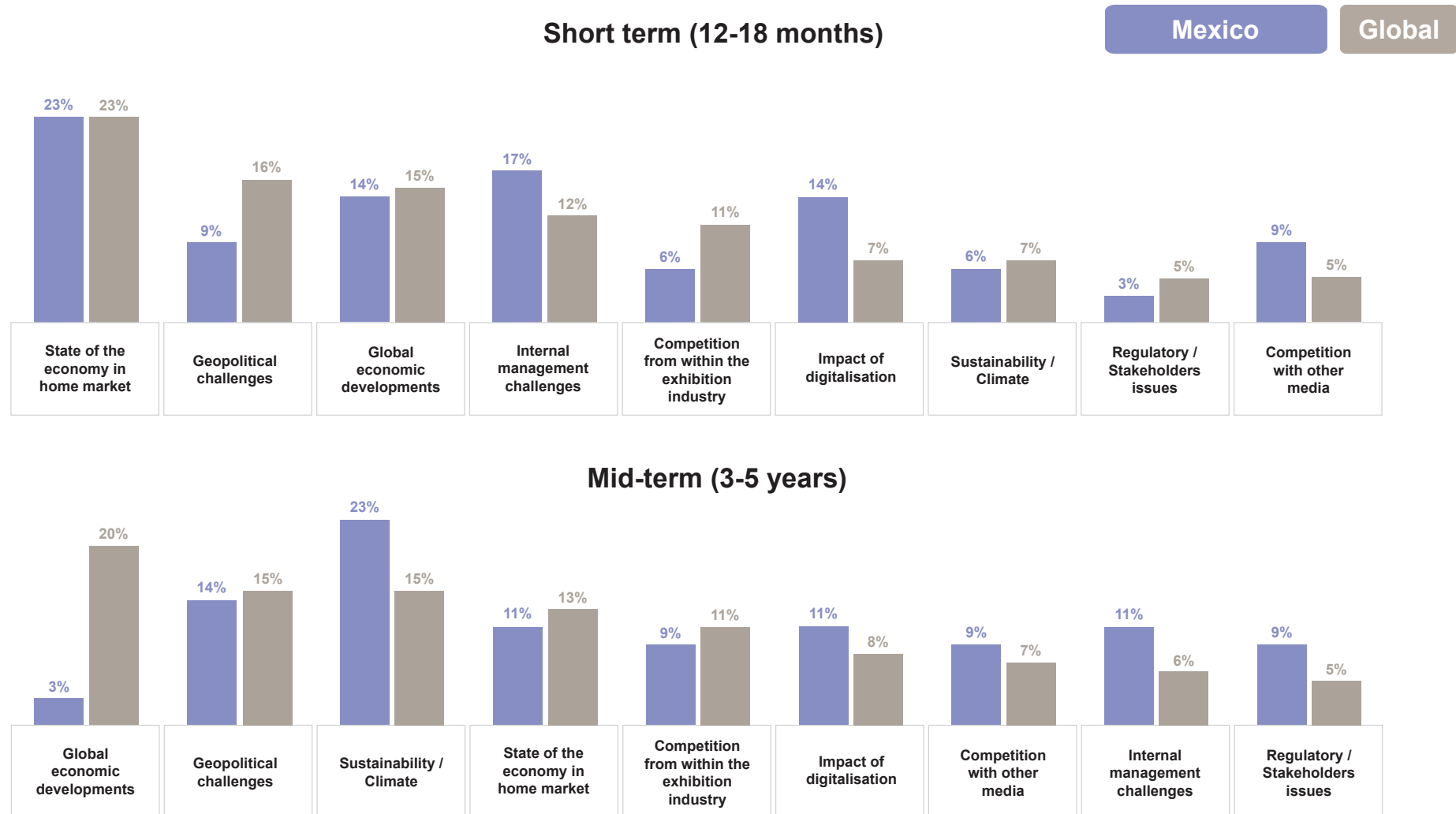


How do you plan to develop your workforce in the coming 6 months



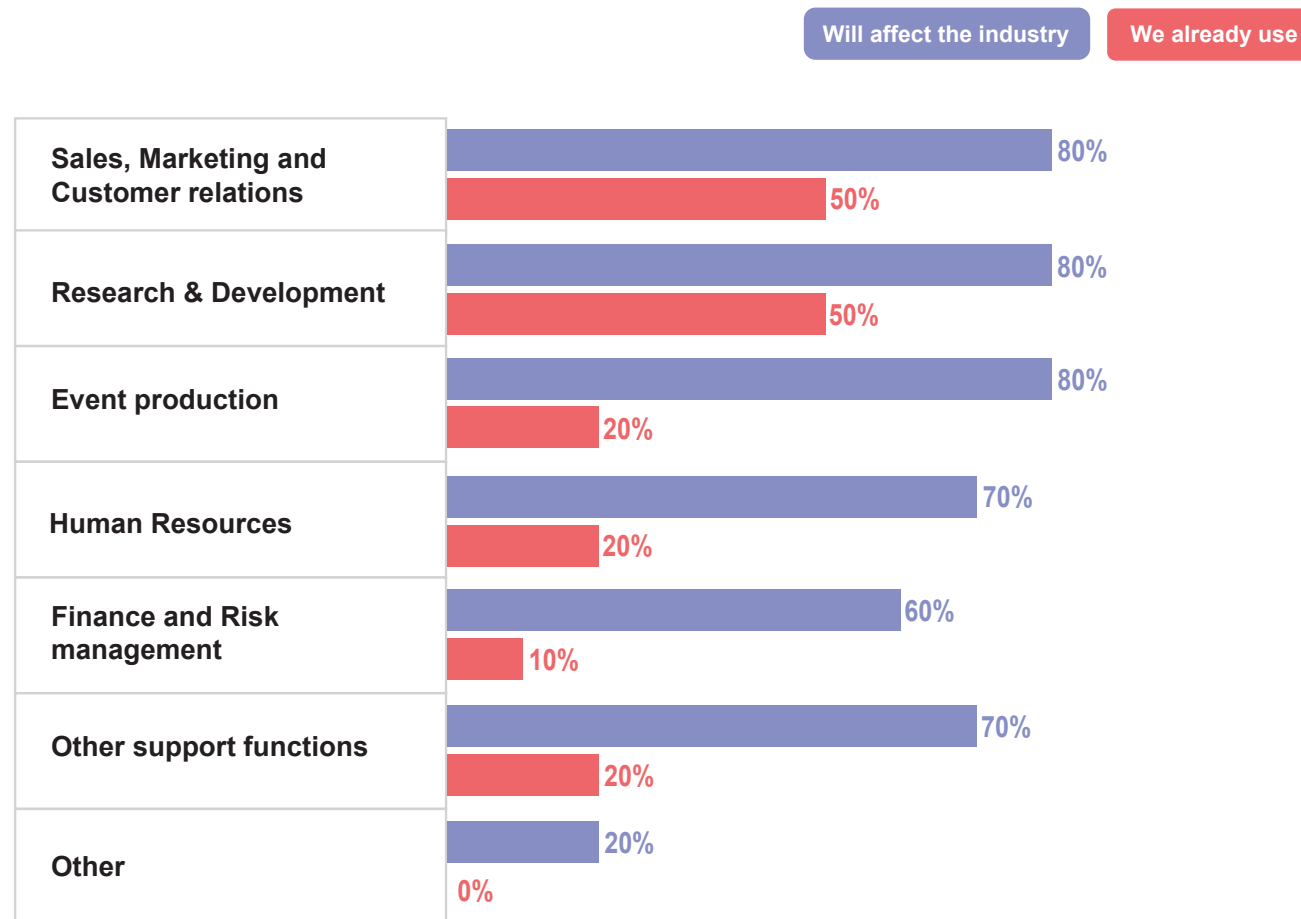


Most important business issues in the exhibition industry right now





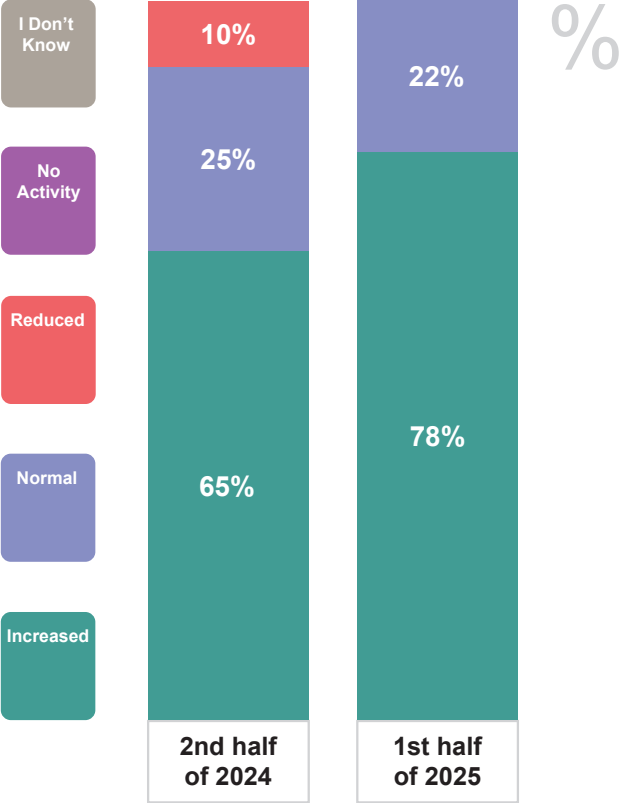
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



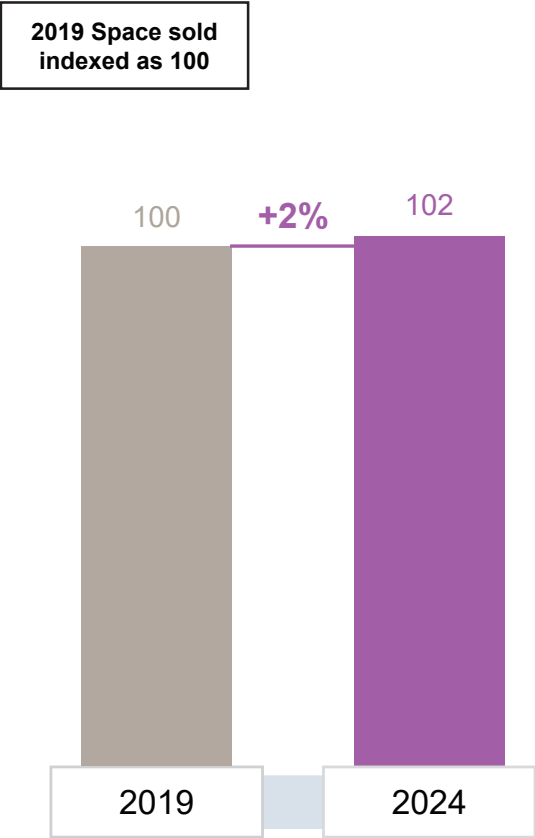
Detailed results for US



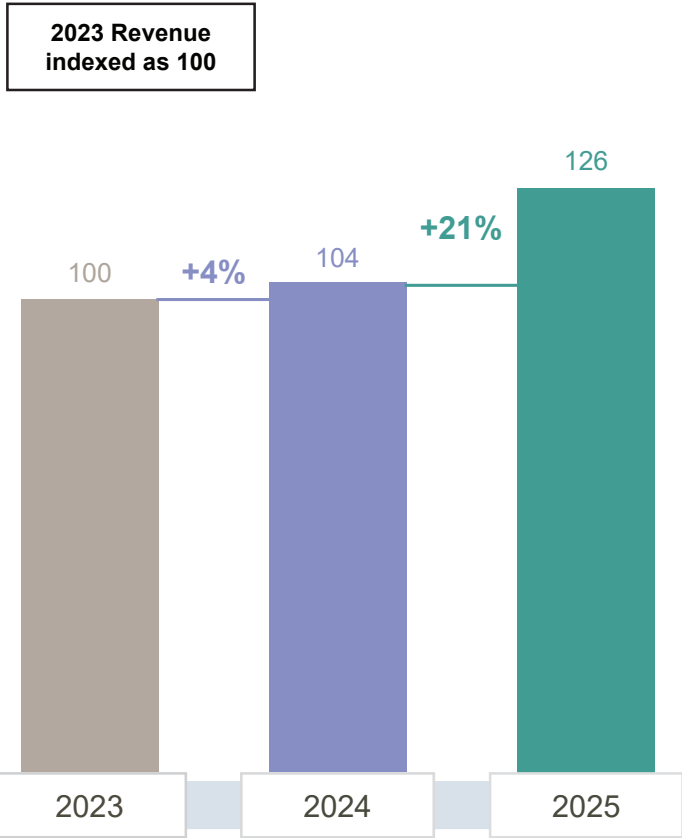
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



Revenue compared to previous year

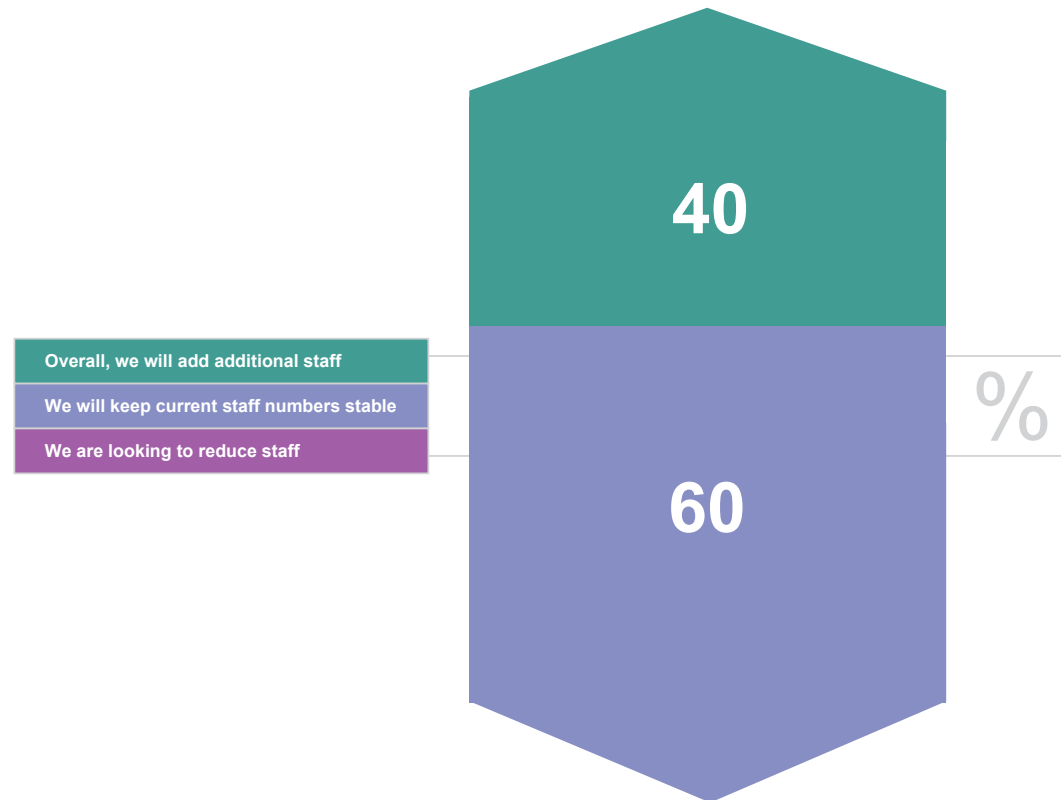




Operating profits compared to the previous year and others

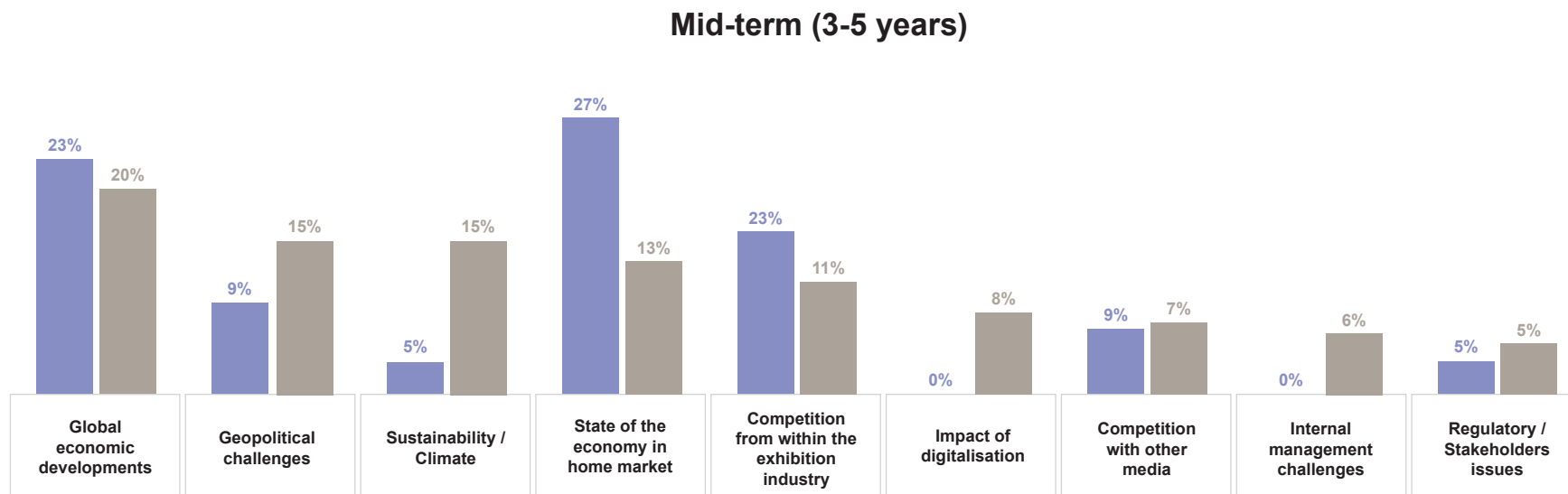
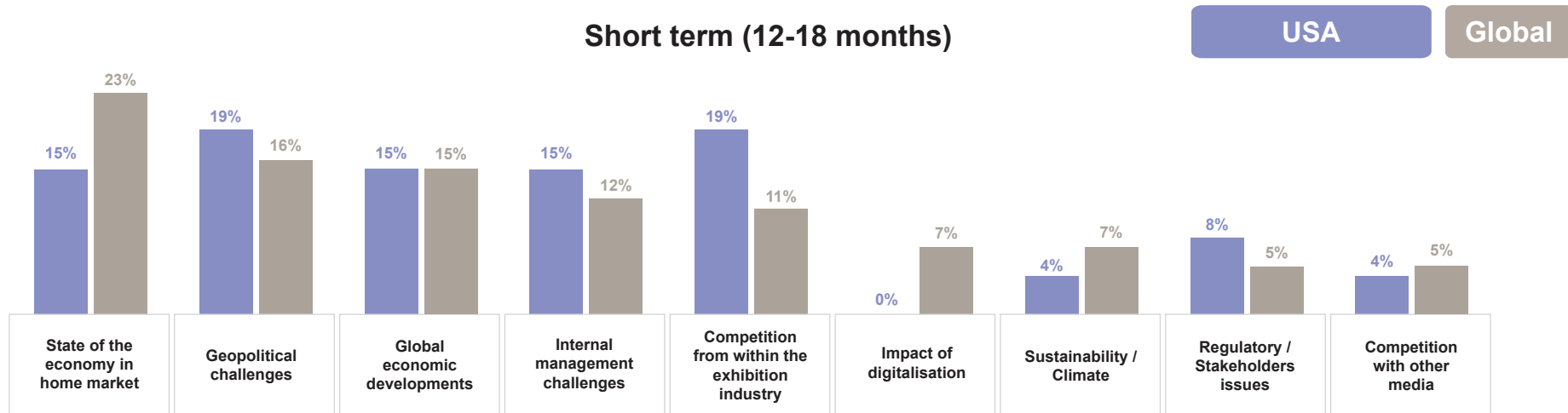


How do you plan to develop your workforce in the coming 6 months



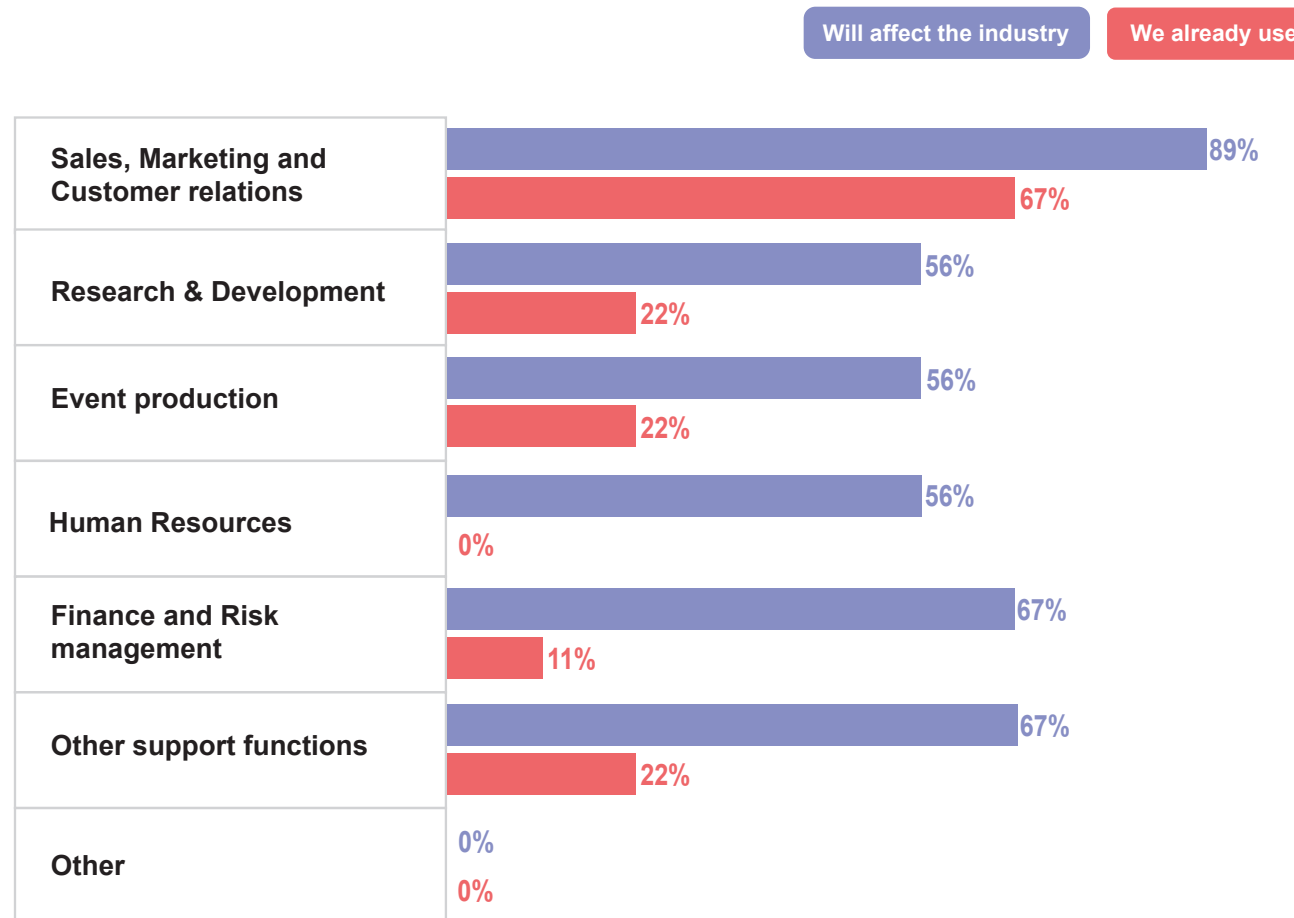


Most important business issues in the exhibition industry right now





Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



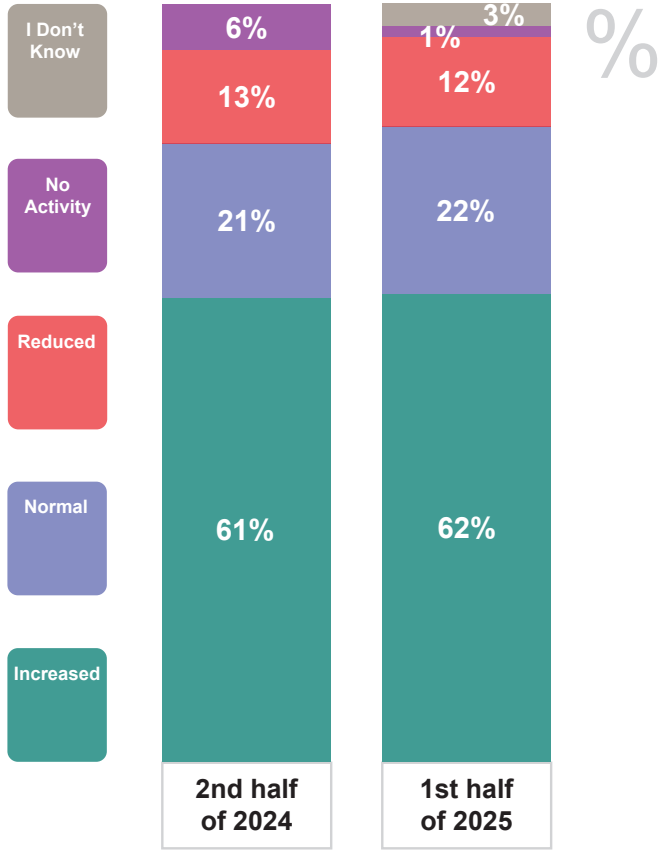


Central & South America



Situation of the industry operations for the current year, and predictions for the next year

Central & South America



World

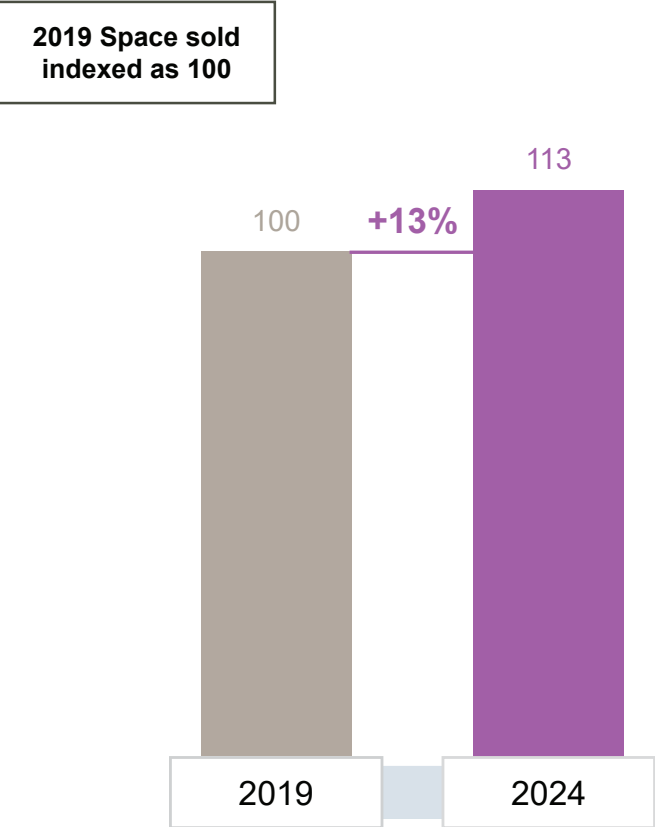


Space Sold Central & South America

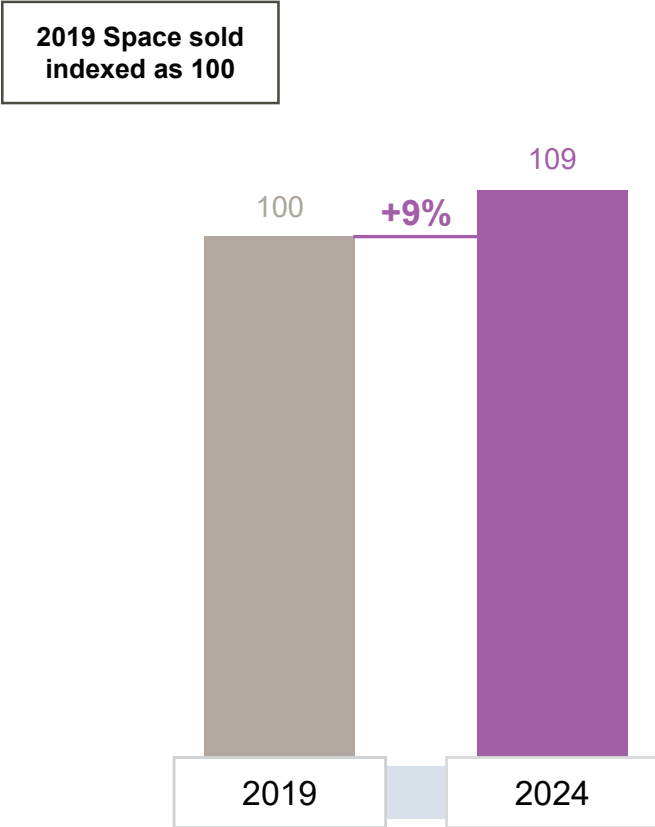


Exhibition space sold in 2024 compared to 2019

Central & South America



World

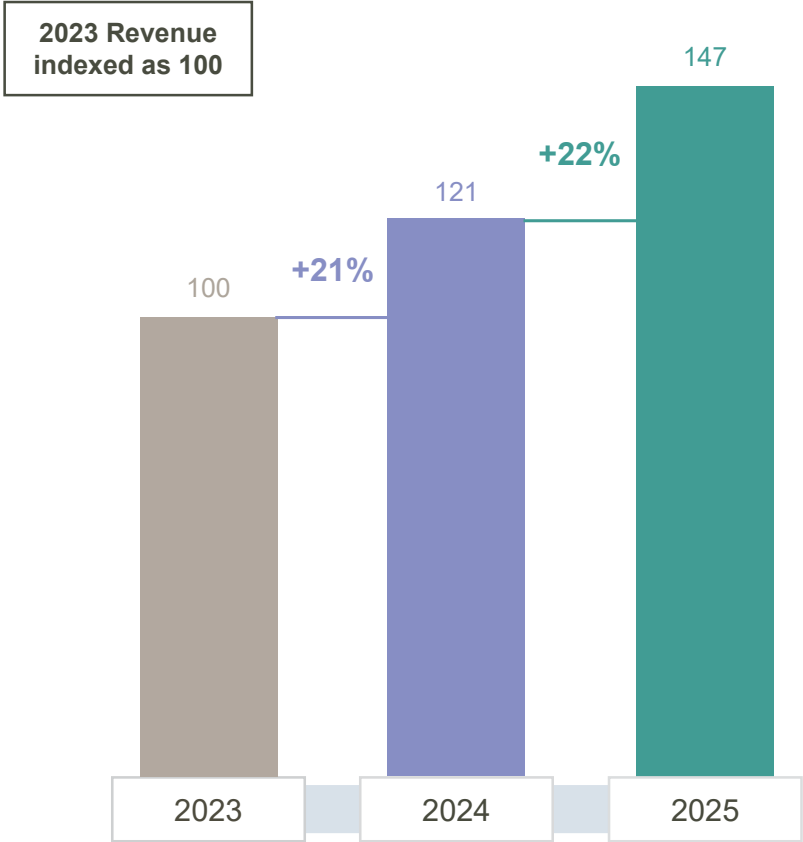


Turnover Central & South America

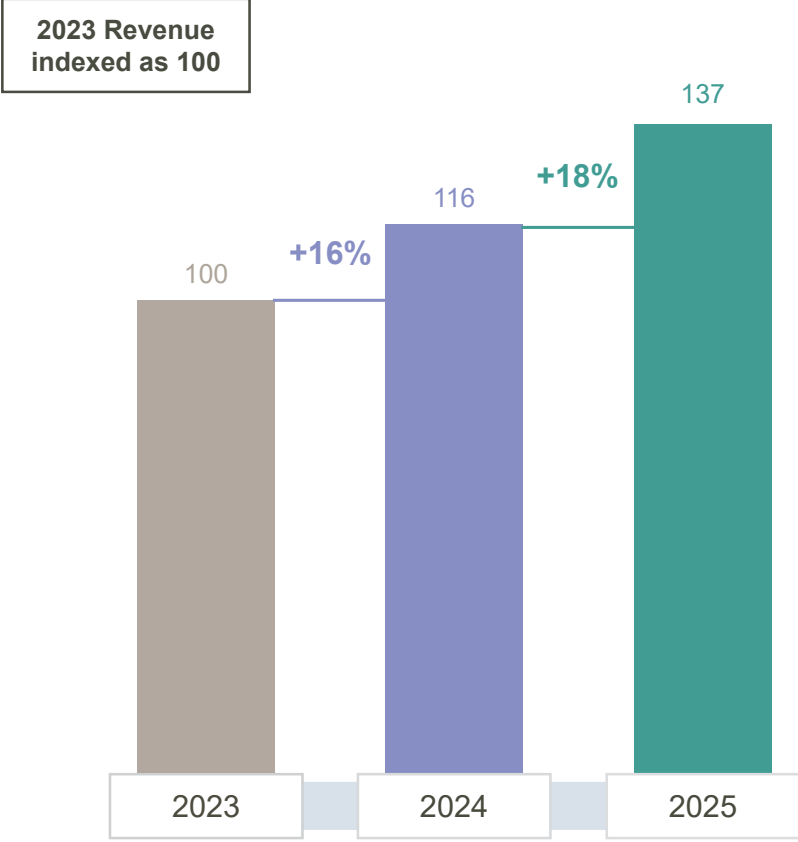


Revenue compared to previous year

Central & South America



World

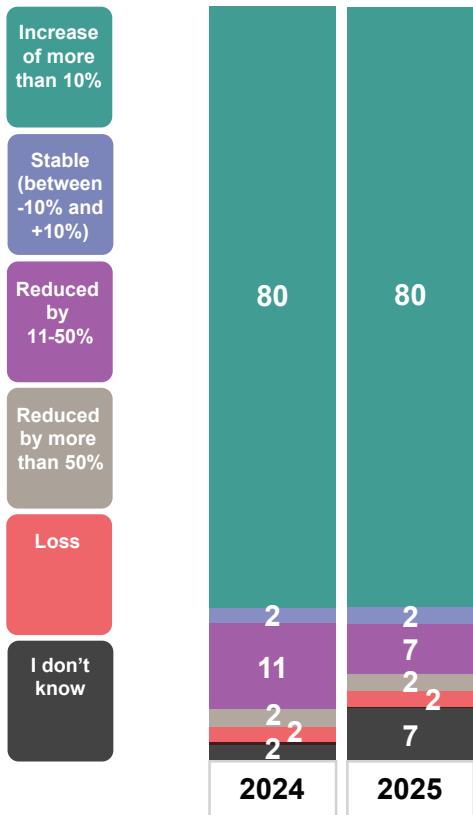


Operating Profits Central & South America

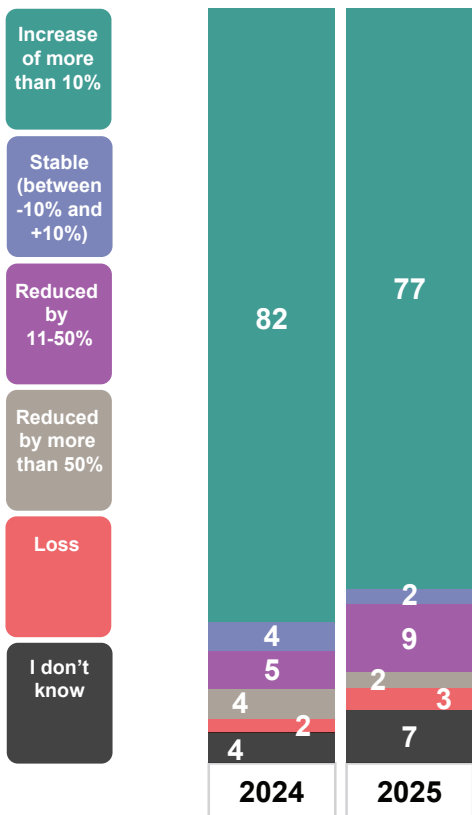


Operating profits compared to previous year

Central & South America

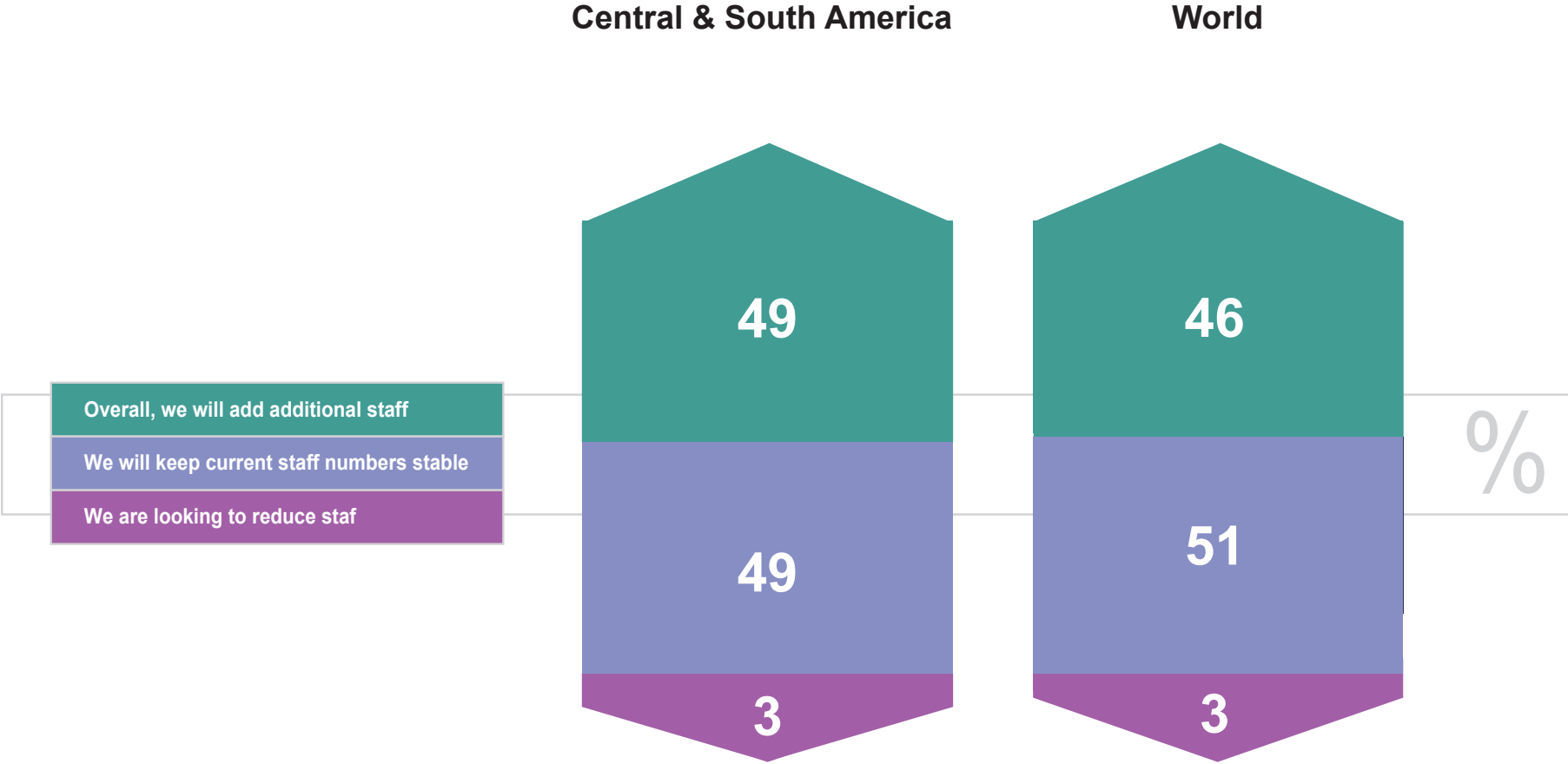


World





How do you plan to develop your workforce in the coming 6 months



Most Important Business Issues - Key Factors for Business Development - Central & South America

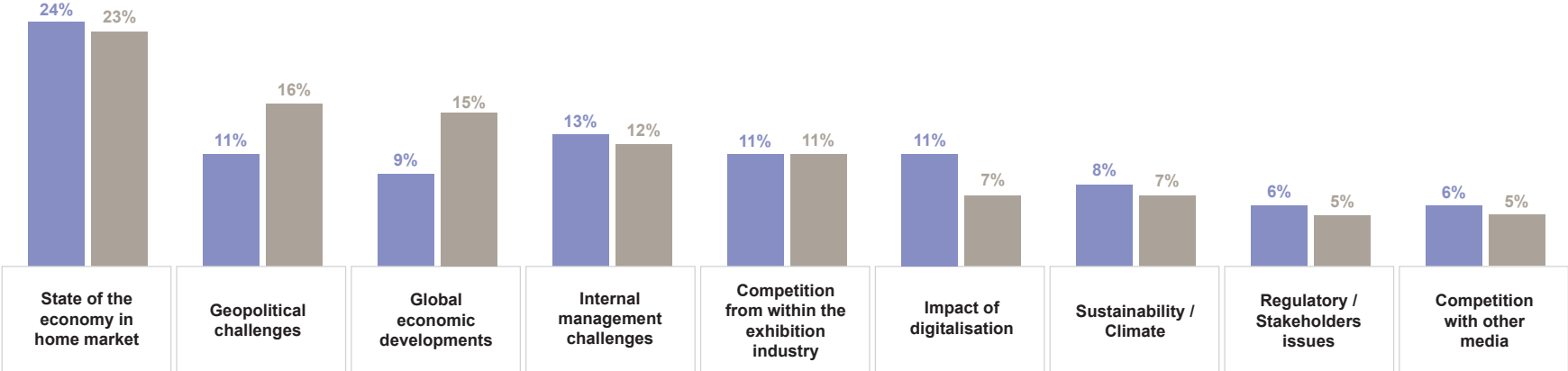


Most important business issues in the exhibition industry right now

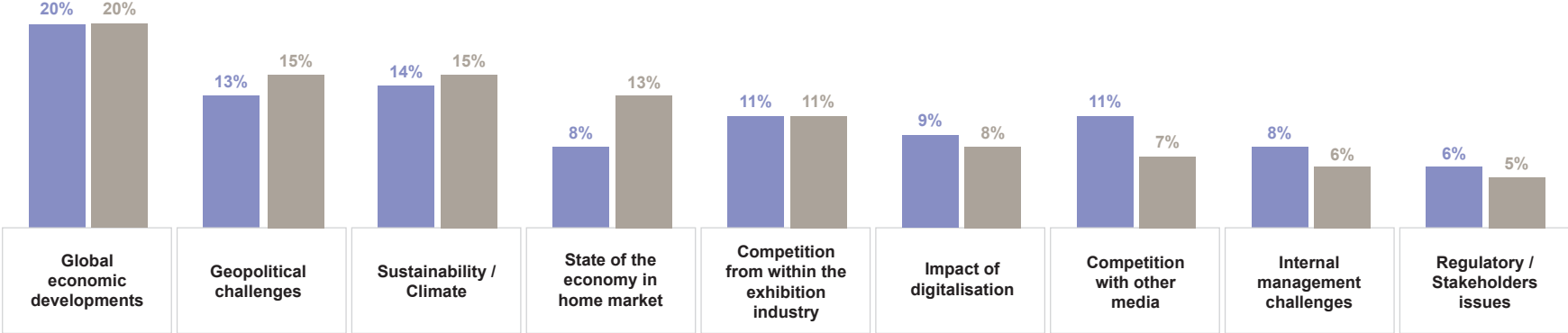
Short term (12-18 months)

Central & South America

Global



Mid-term (3-5 years)



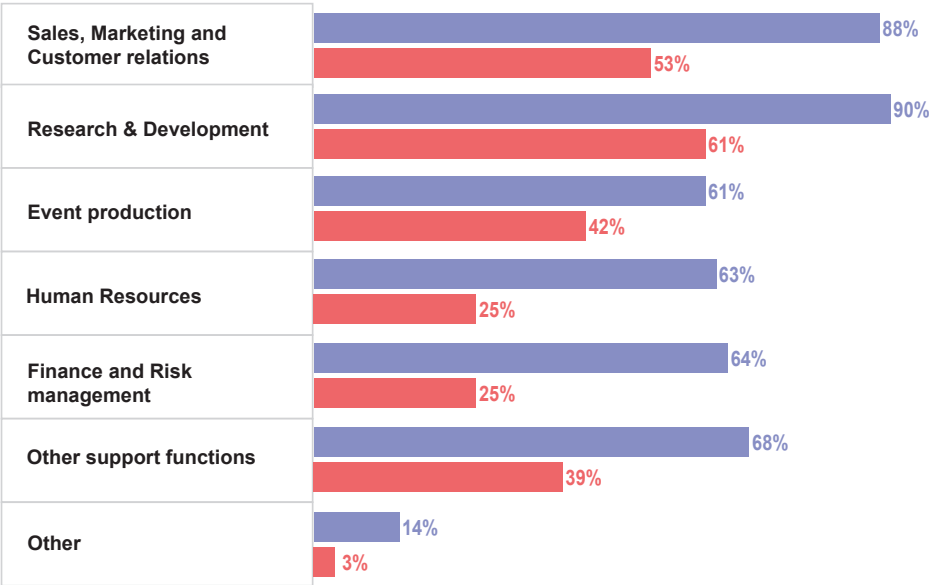
Generative AI Applications Central & South America



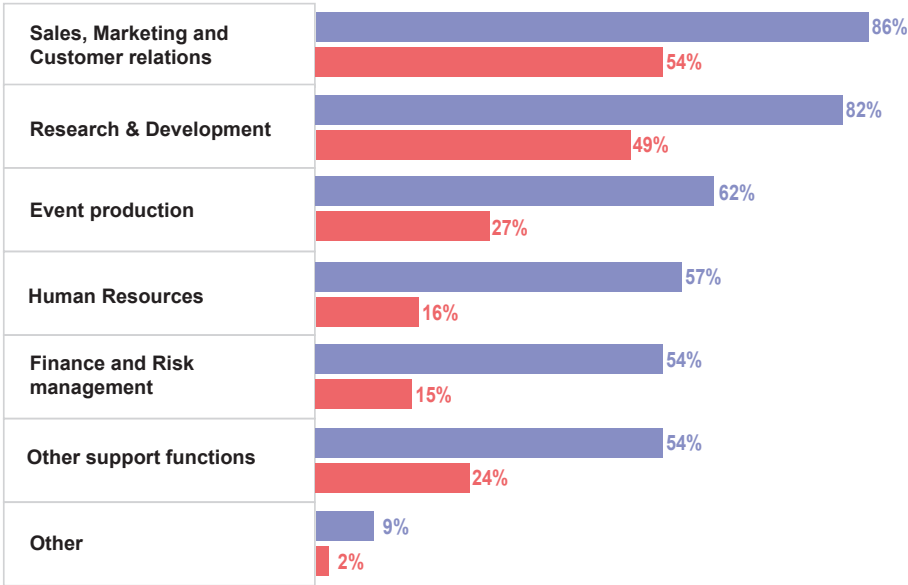
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

Will affect the industry (blue) We already use (red)

Central & South America



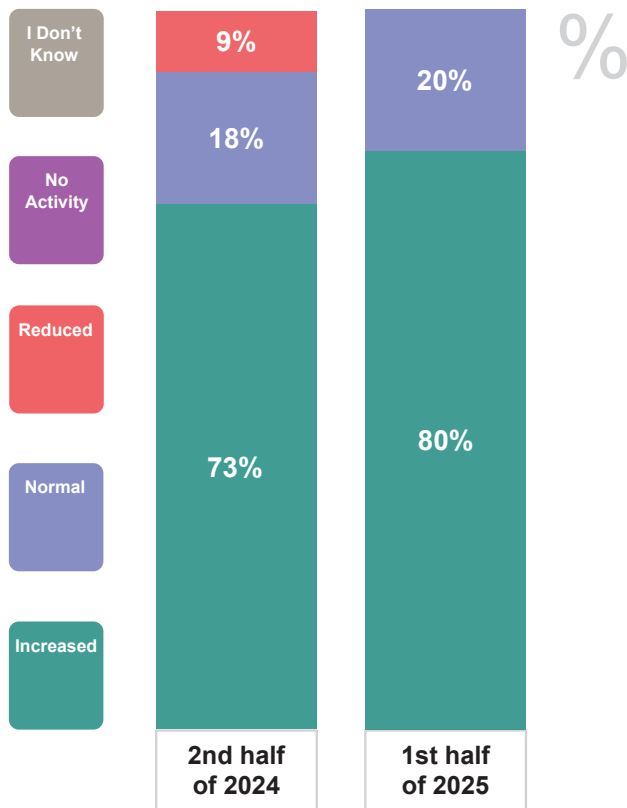
World



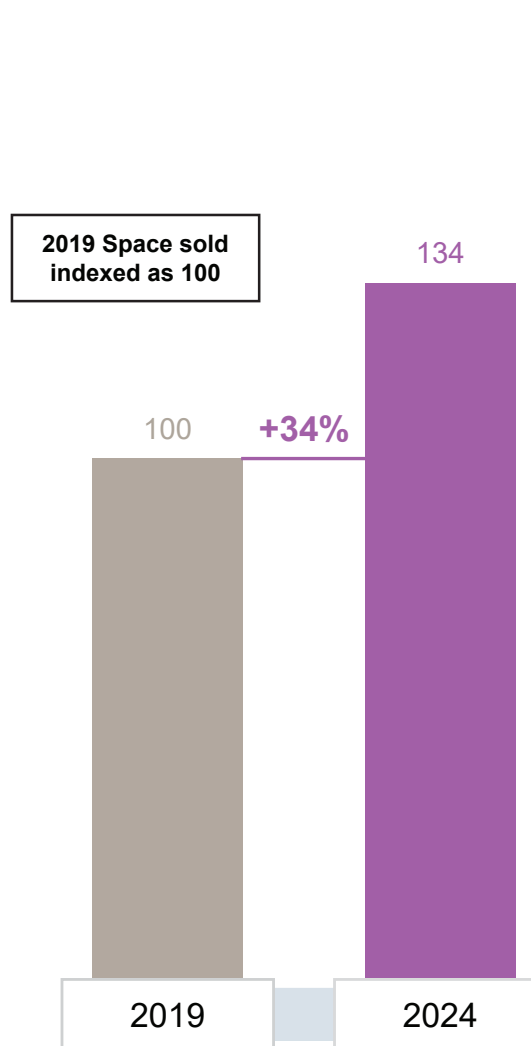
Detailed results for Argentina



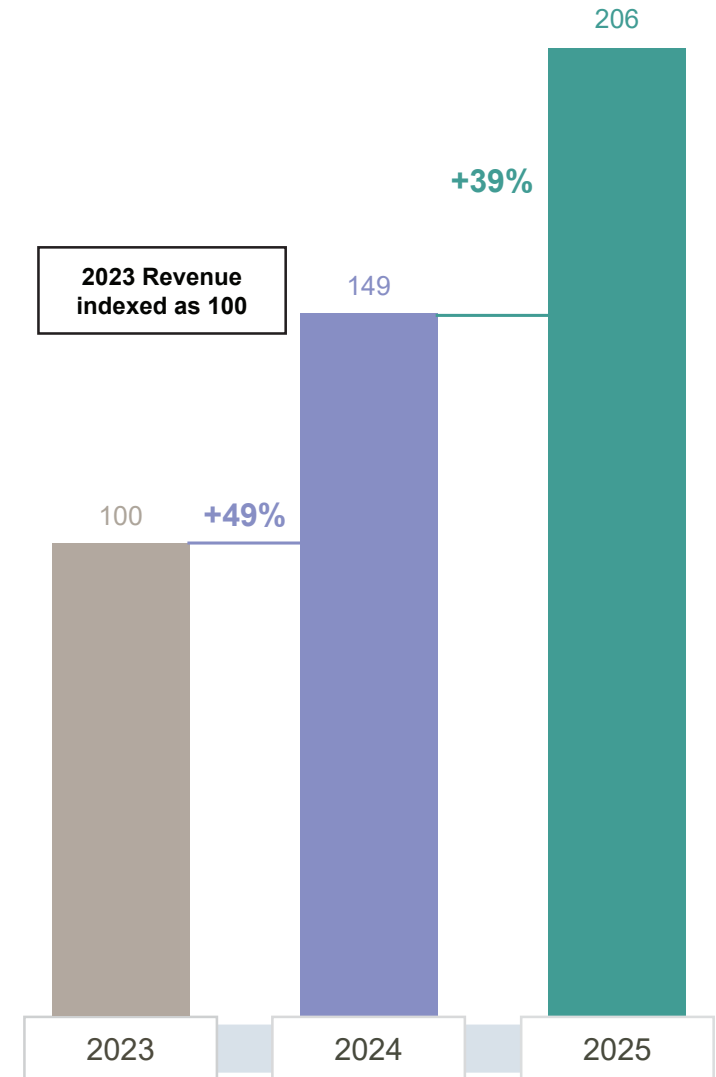
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



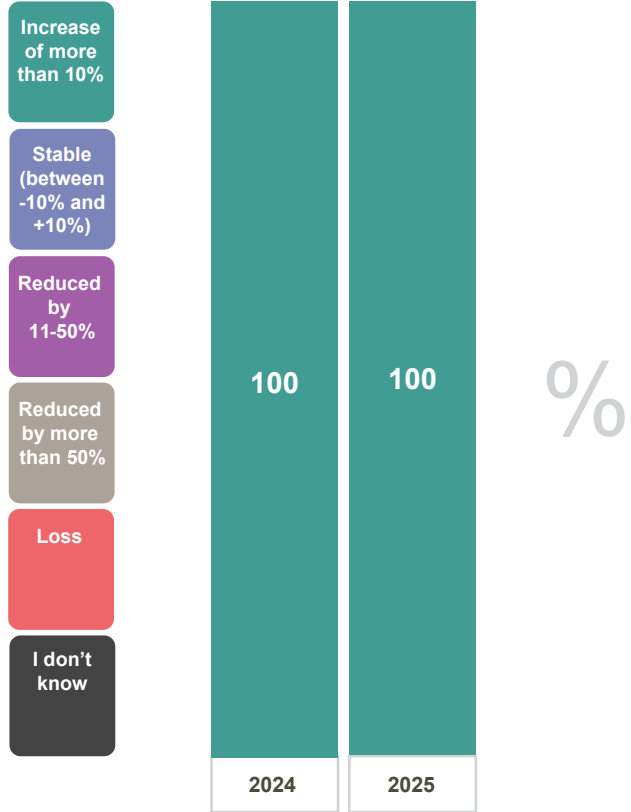
Revenue compared to previous year



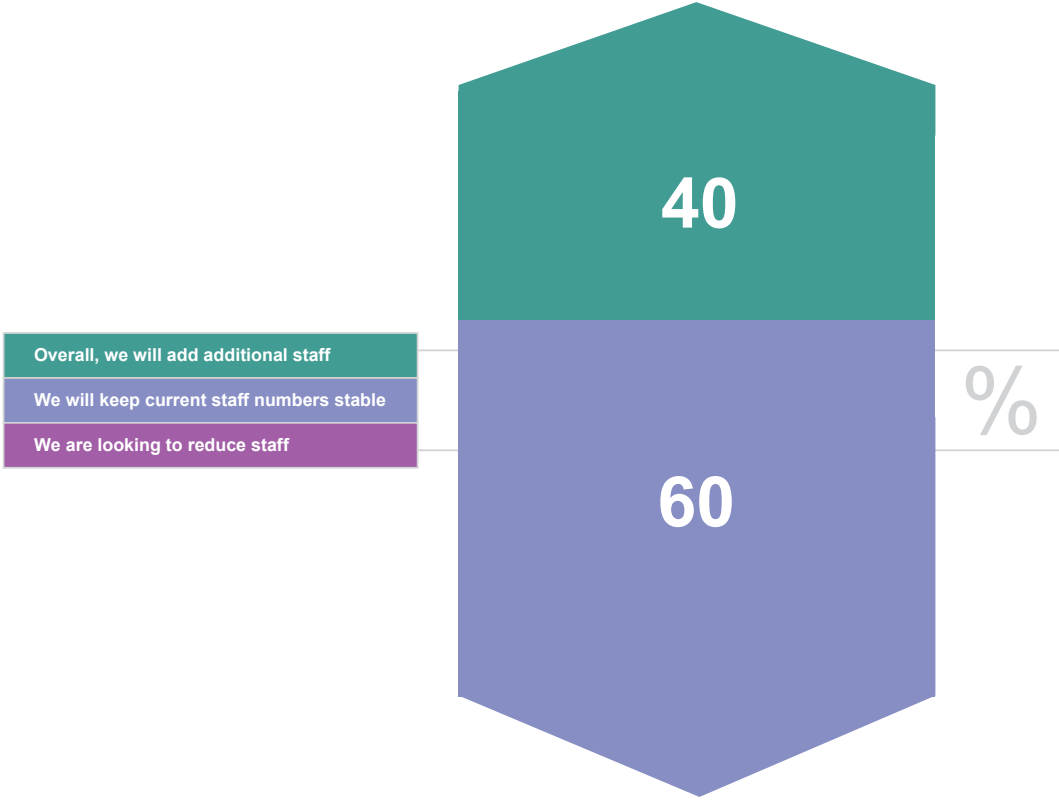
Detailed results for Argentina



Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

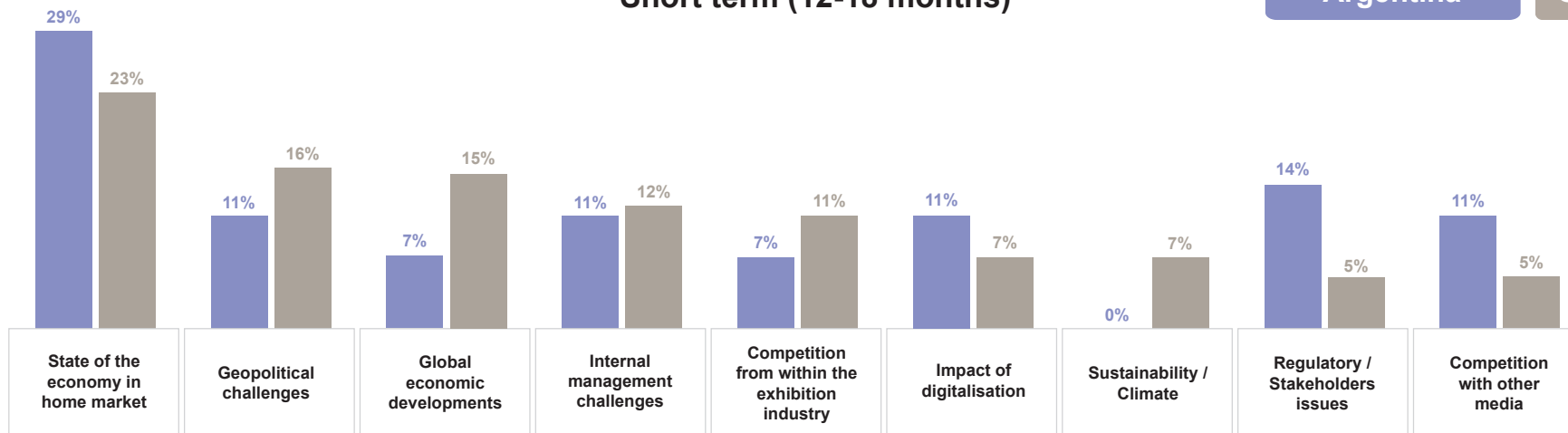




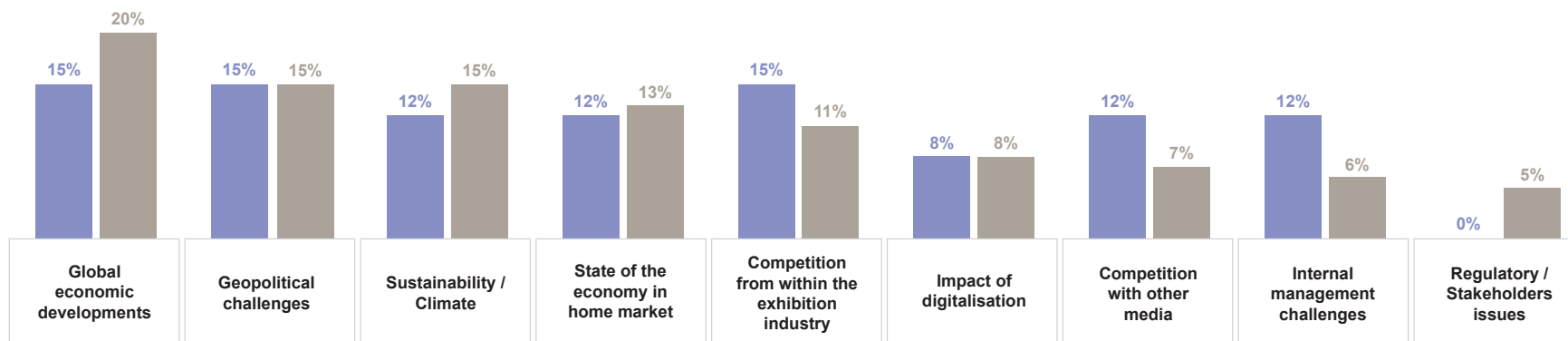
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Argentina Global

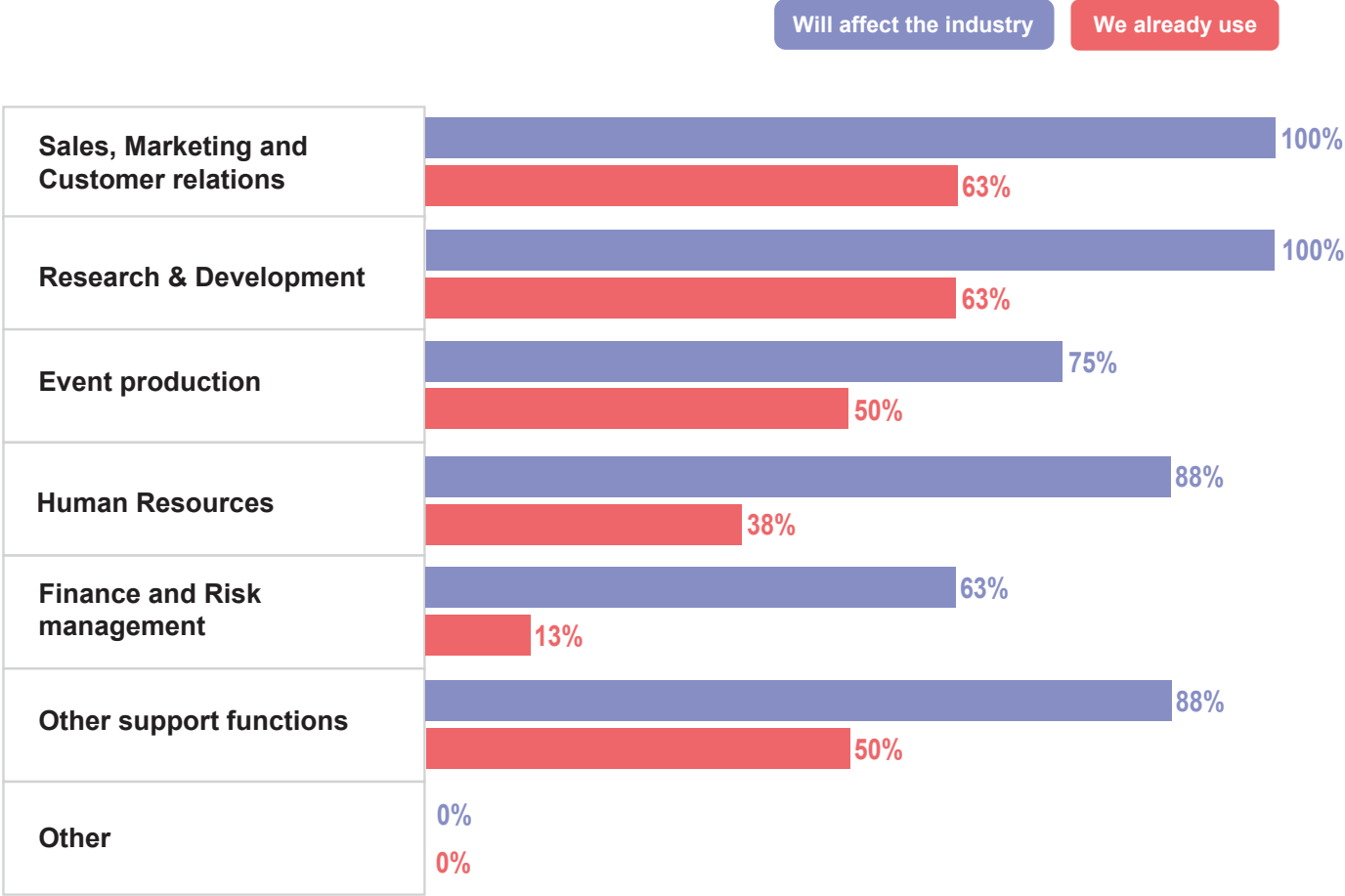


Mid-term (3-5 years)





Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



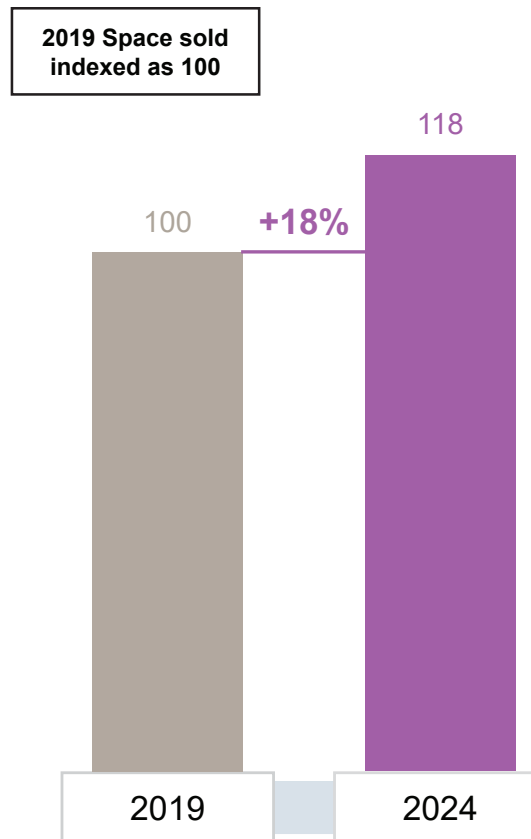
Detailed results for Brazil



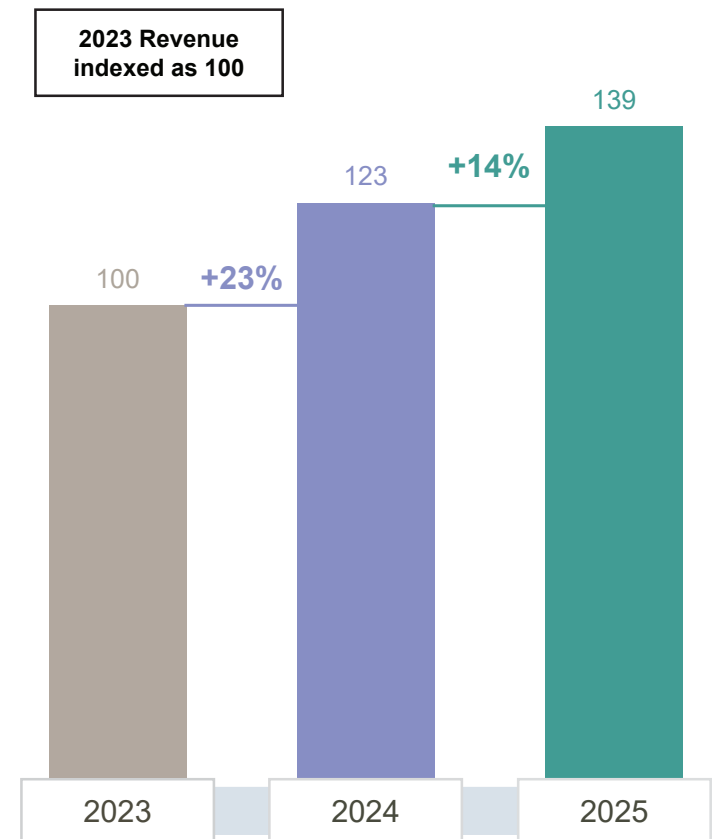
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

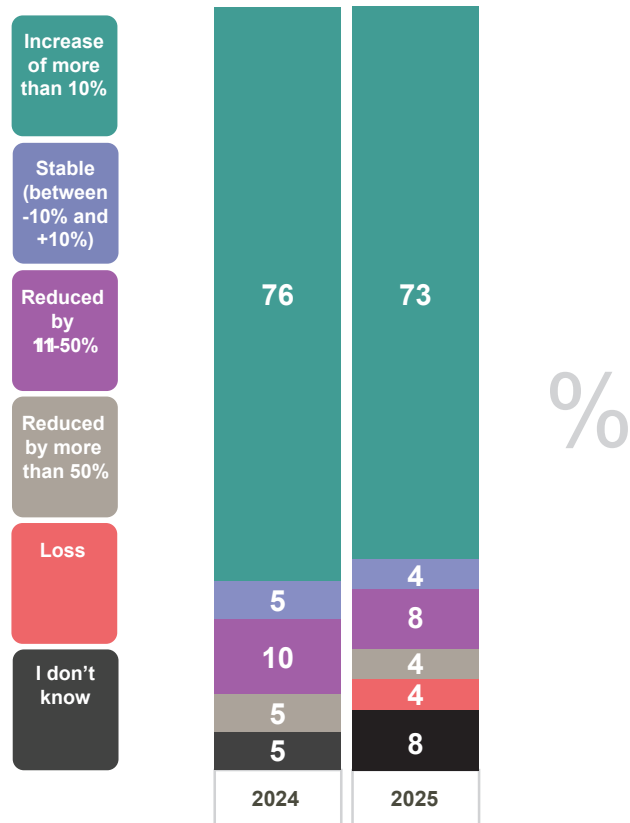


Revenue compared to previous year

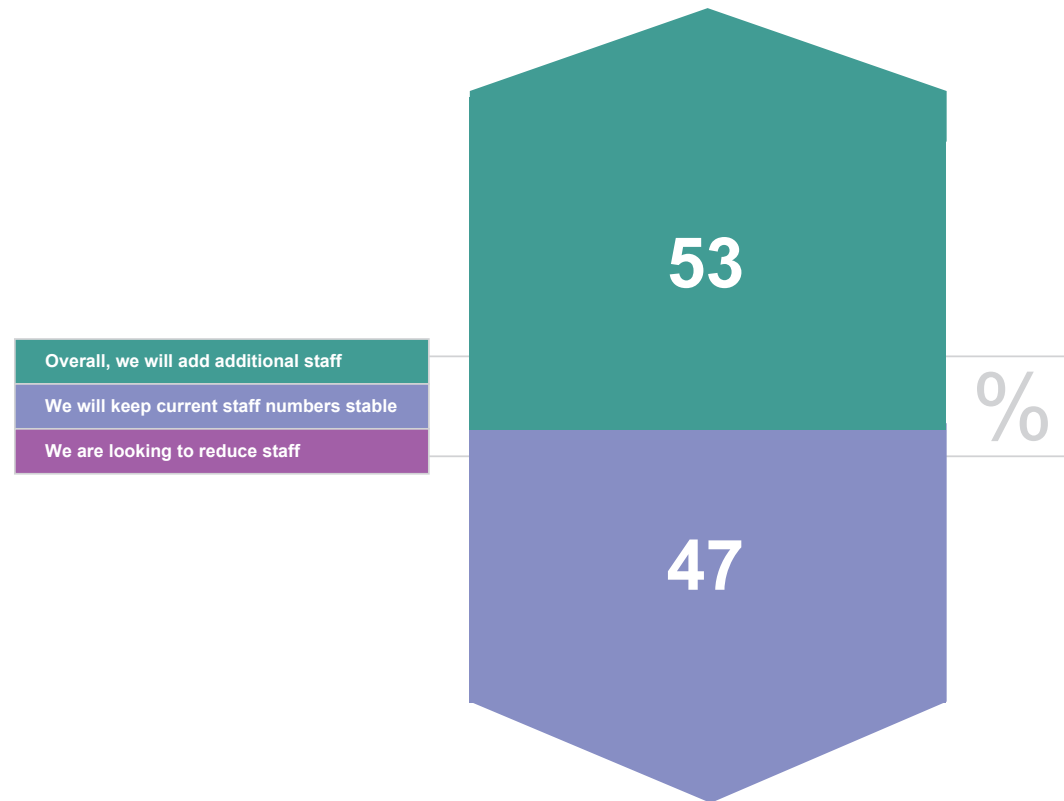




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

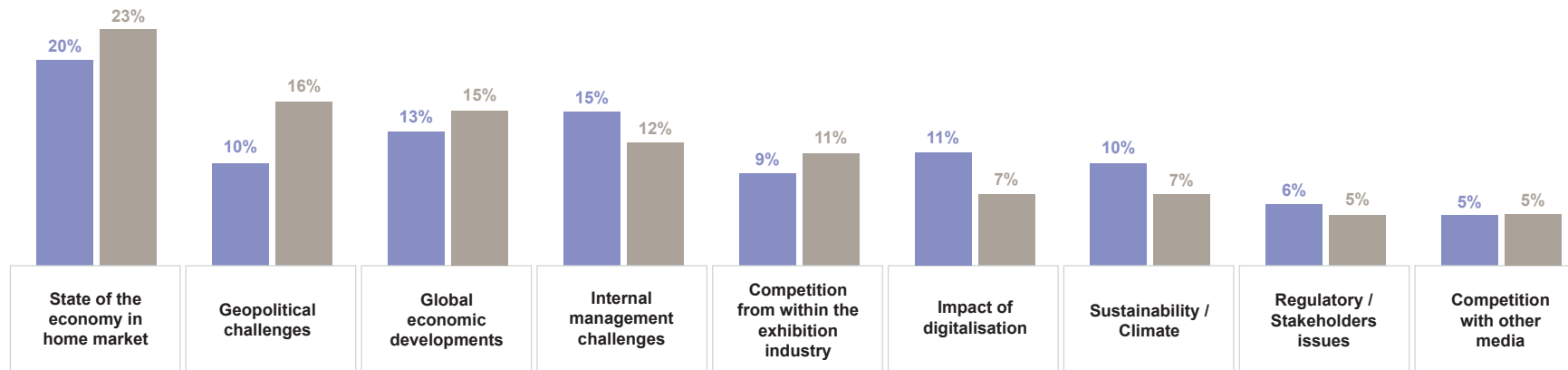




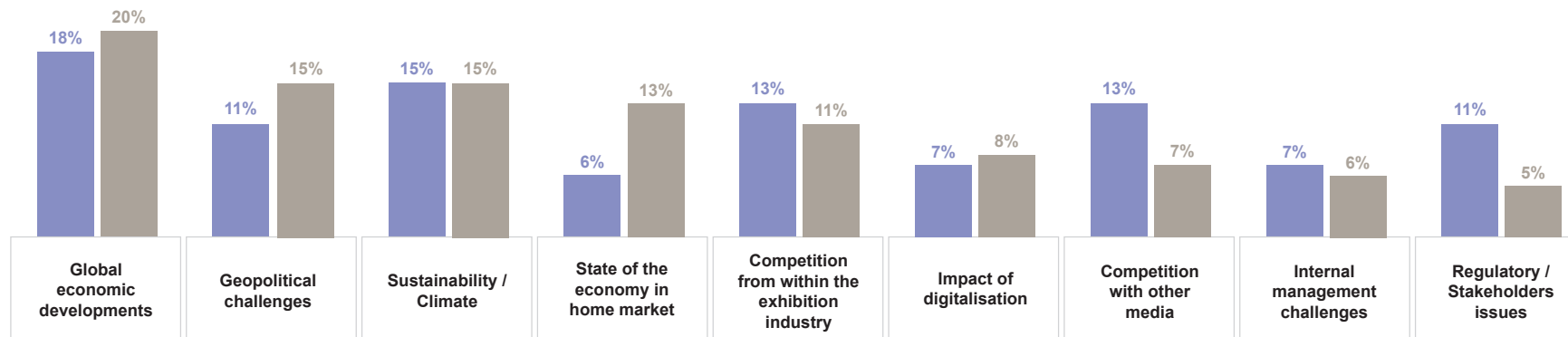
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Brazil **Global**

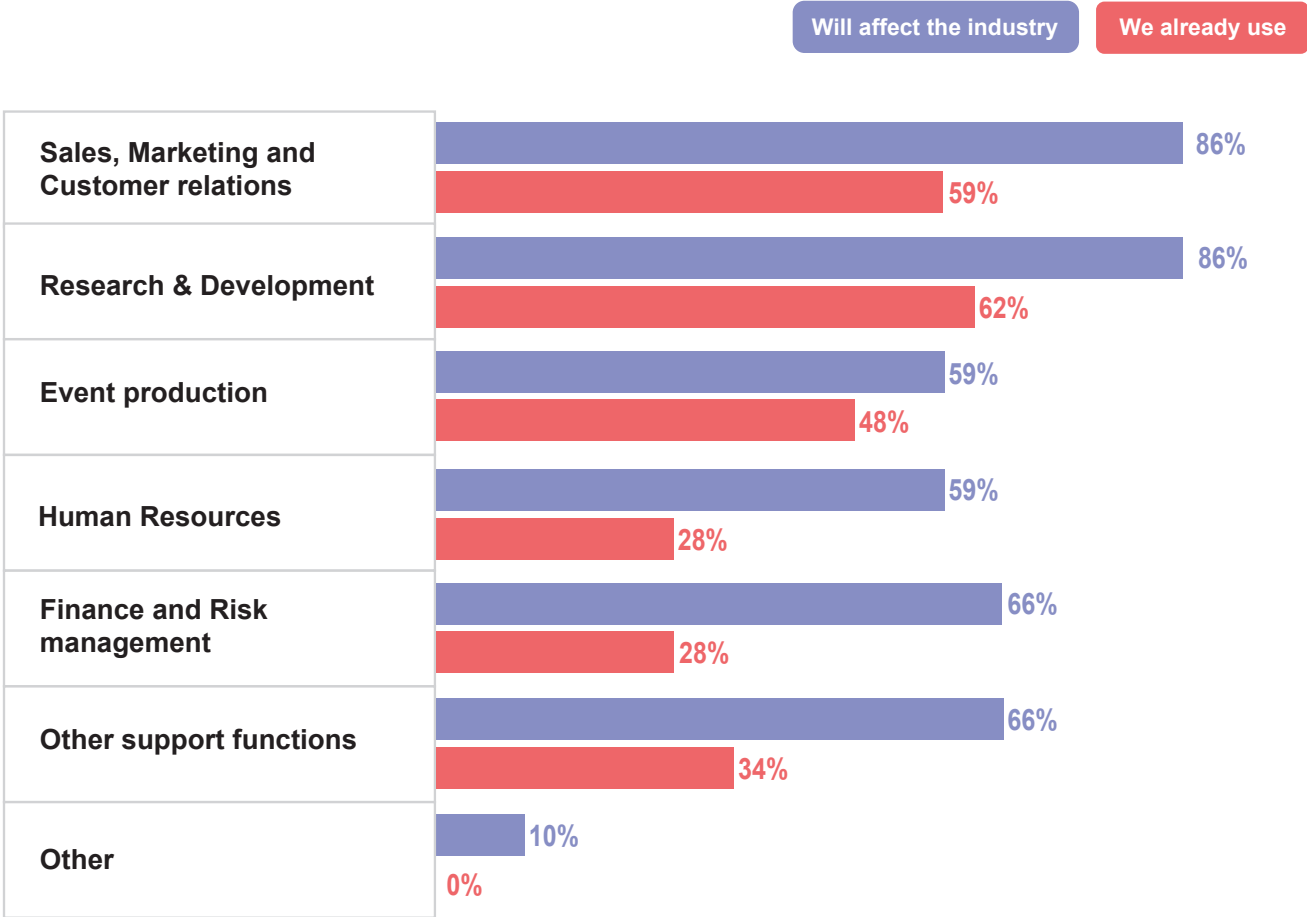


Mid-term (3-5 years)





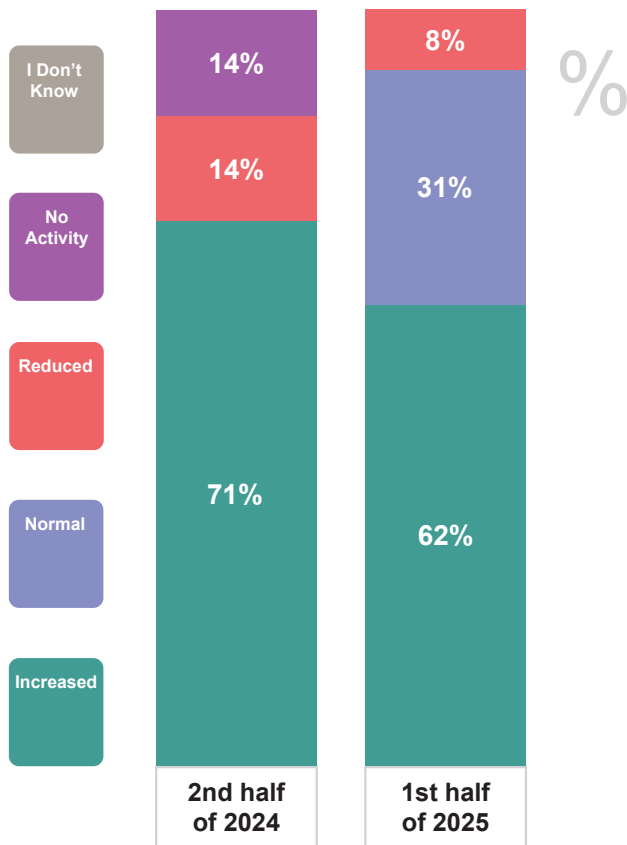
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



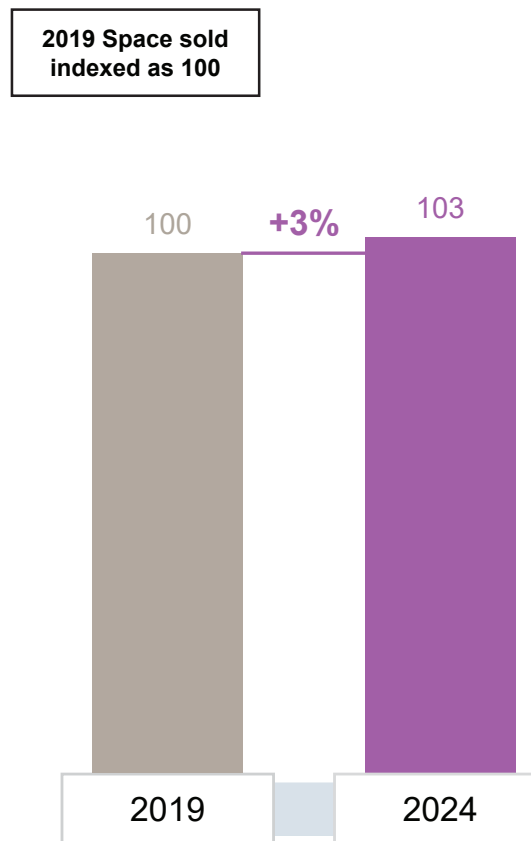
Detailed results for Colombia



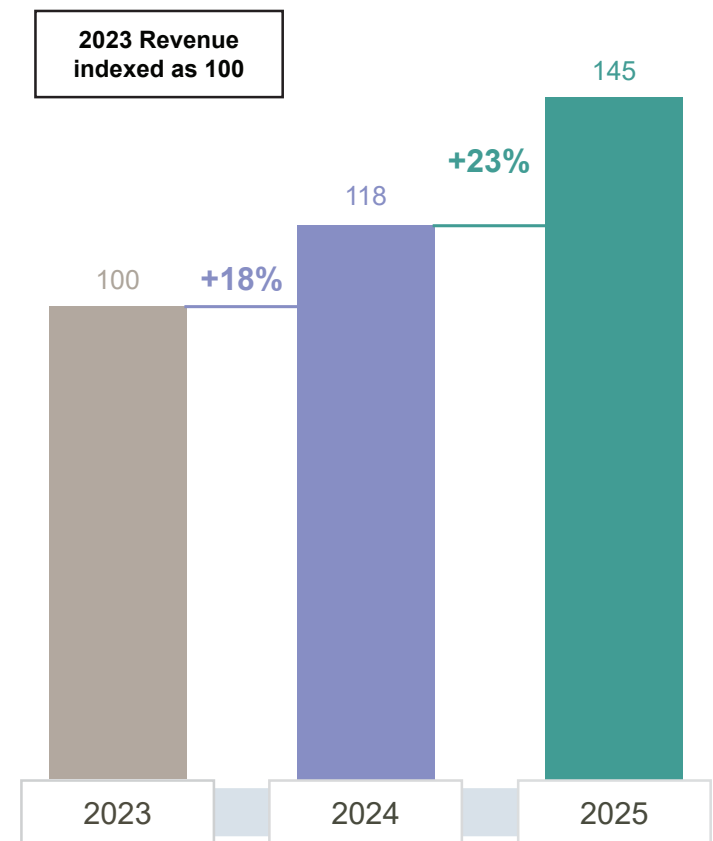
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

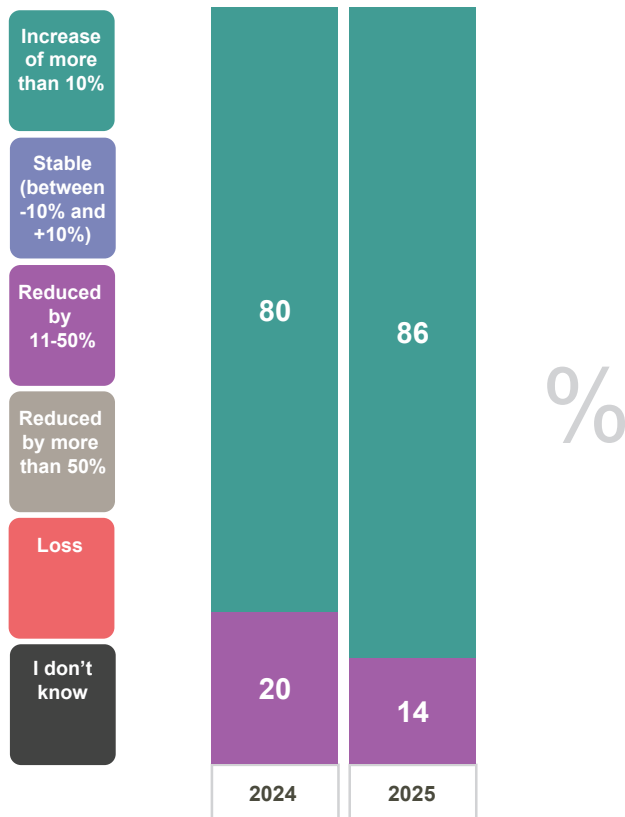


Revenue compared to previous year

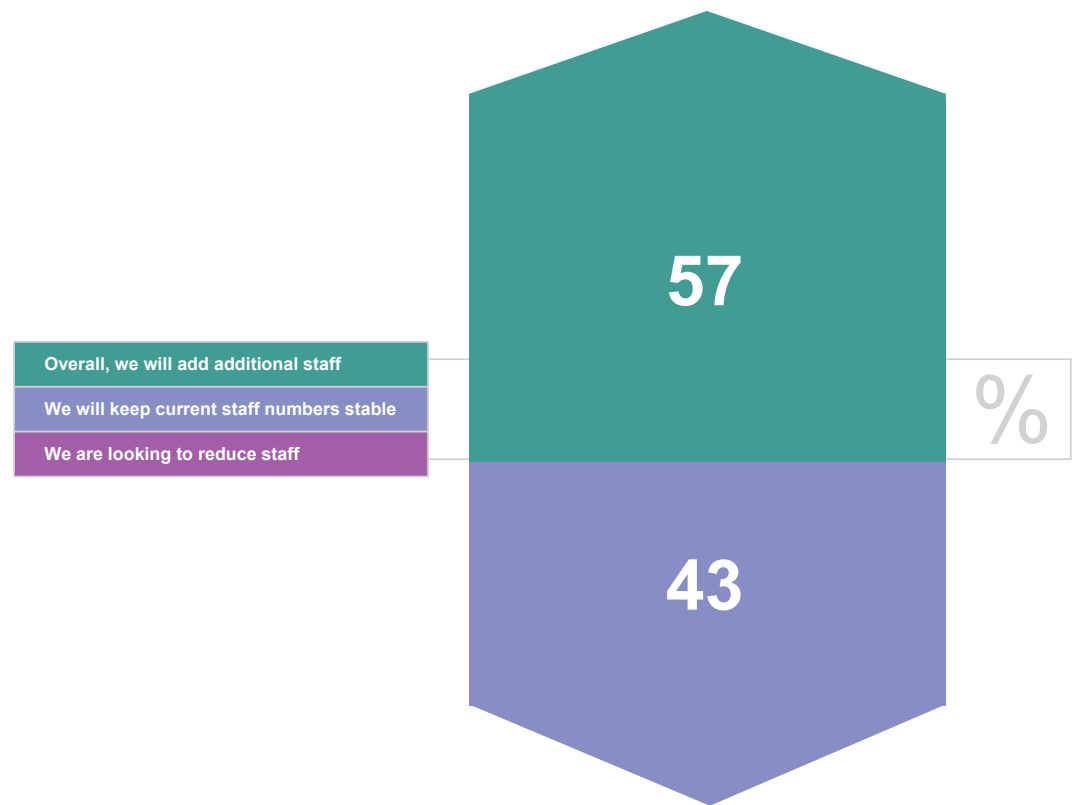




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months



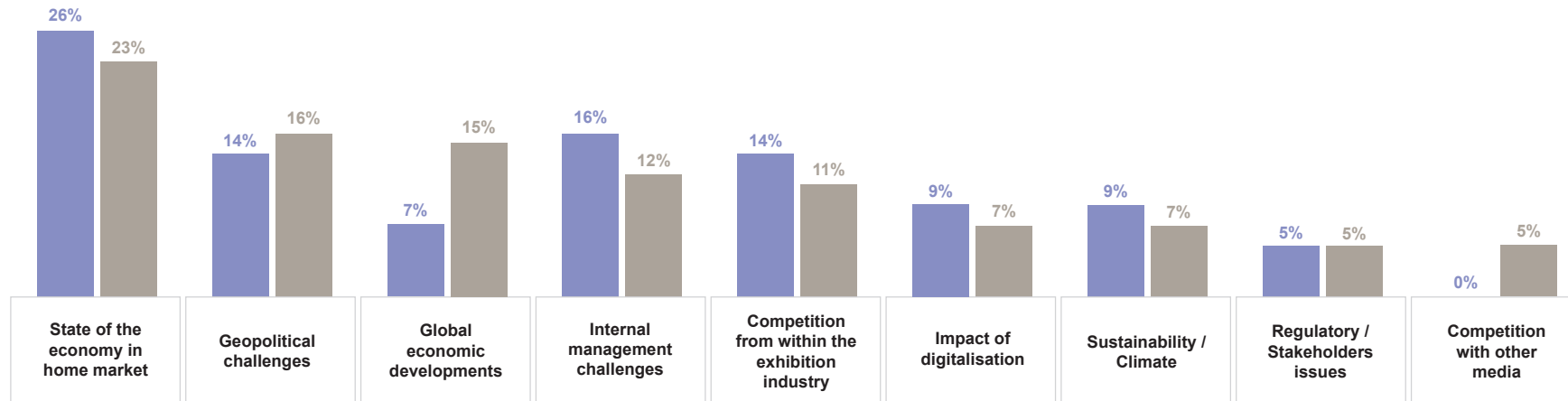


Most important business issues in the exhibition industry right now

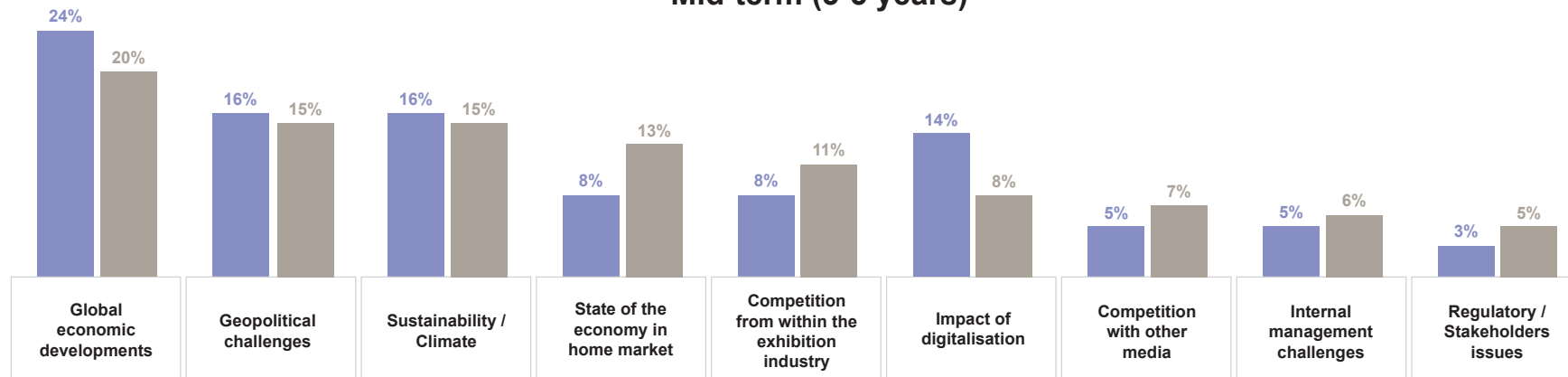
Short term (12-18 months)

Colombia

Global

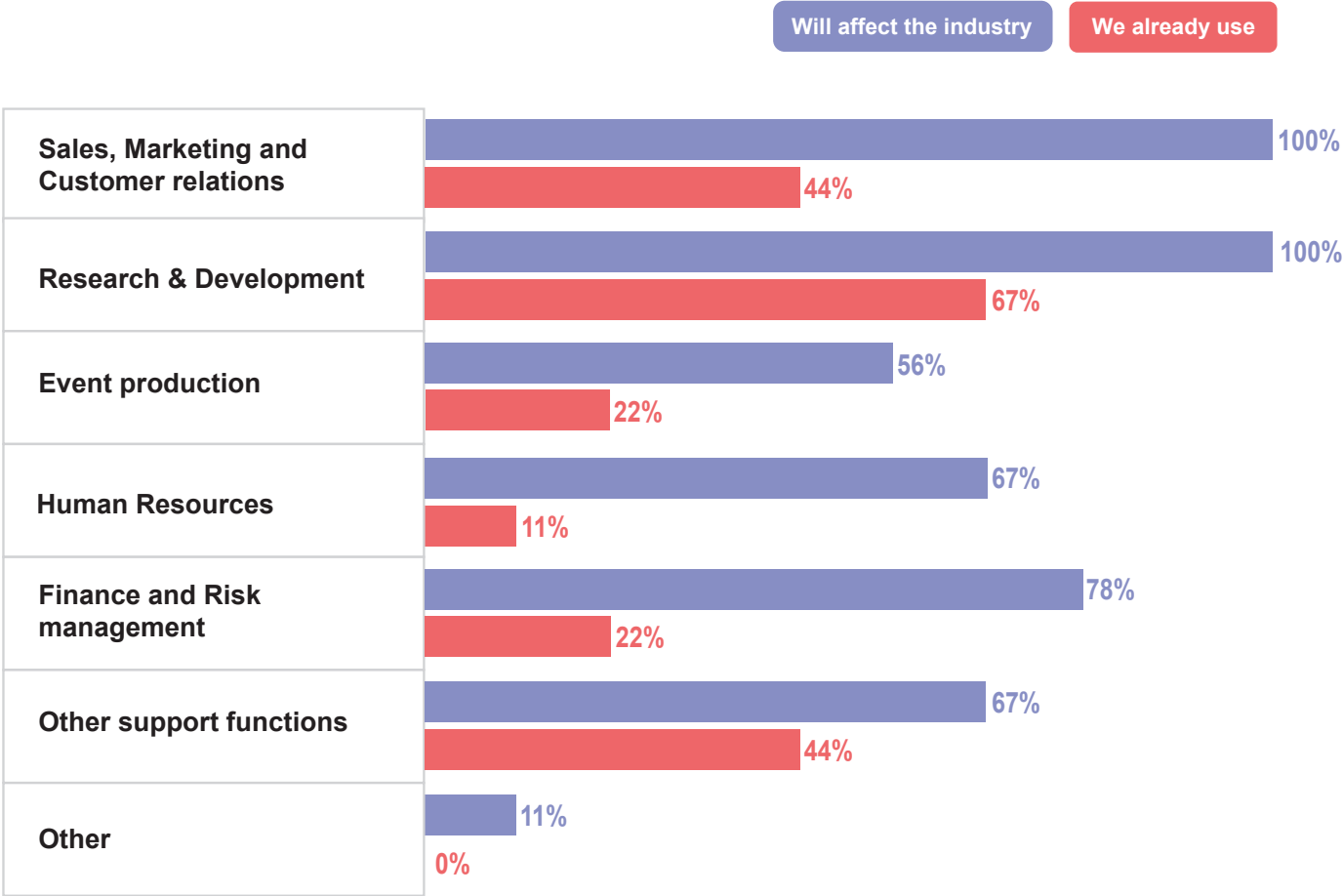


Mid-term (3-5 years)





Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



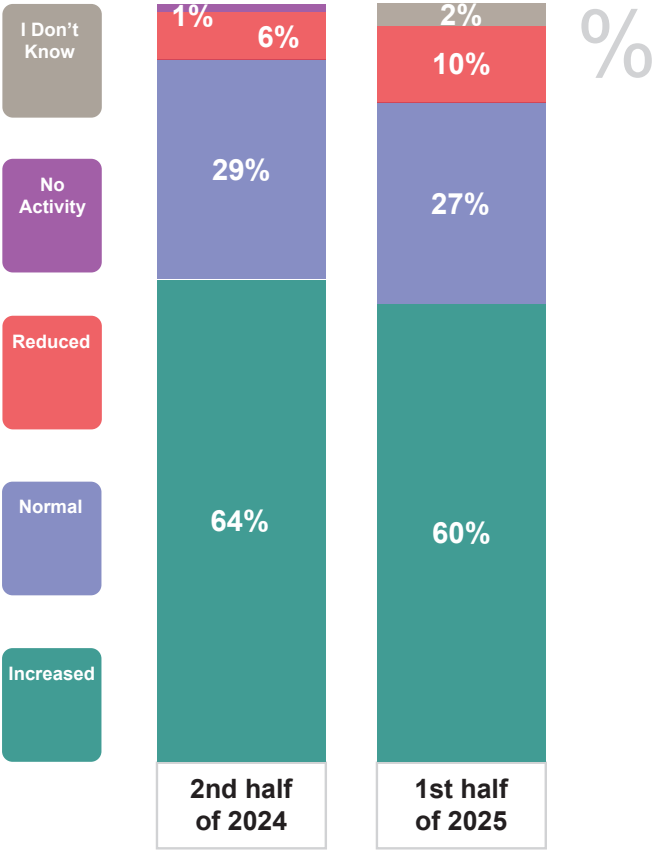


Europe

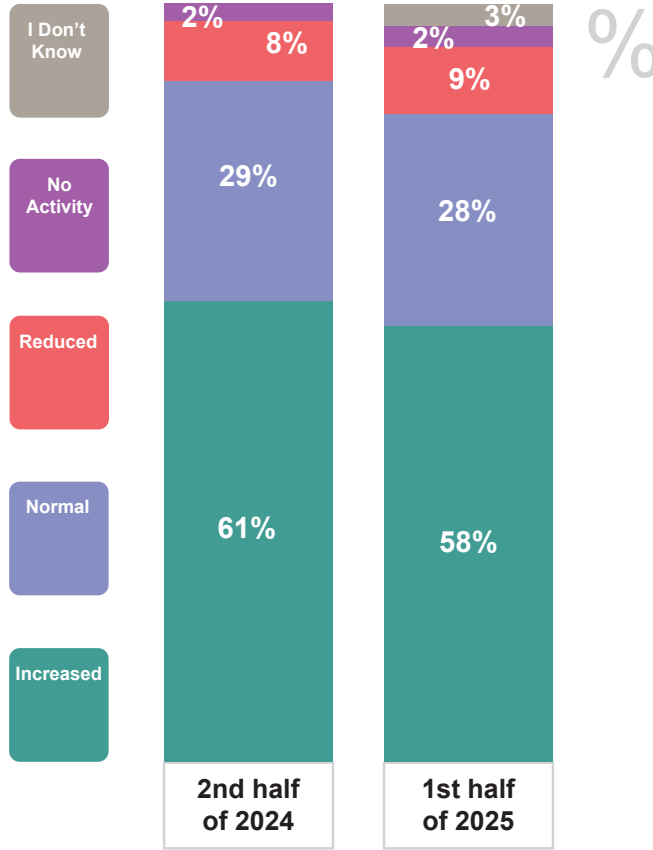


Situation of the industry operations for the current year, and predictions for the next year

Europe



World





Exhibition space sold in 2024 compared to 2019

Europe

2019 Space sold indexed as 100



World

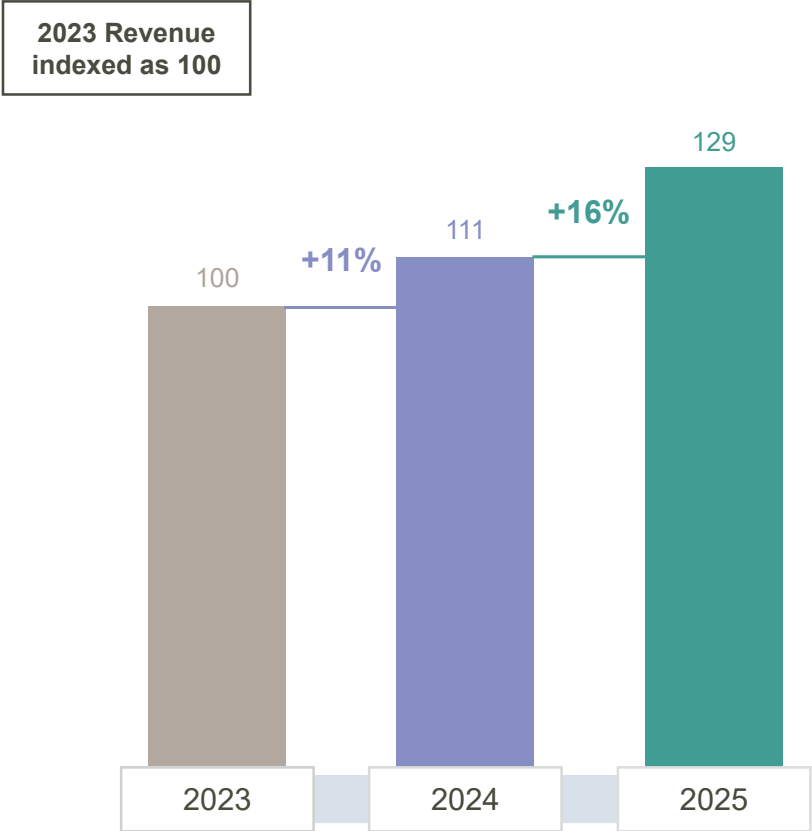
2019 Space sold indexed as 100



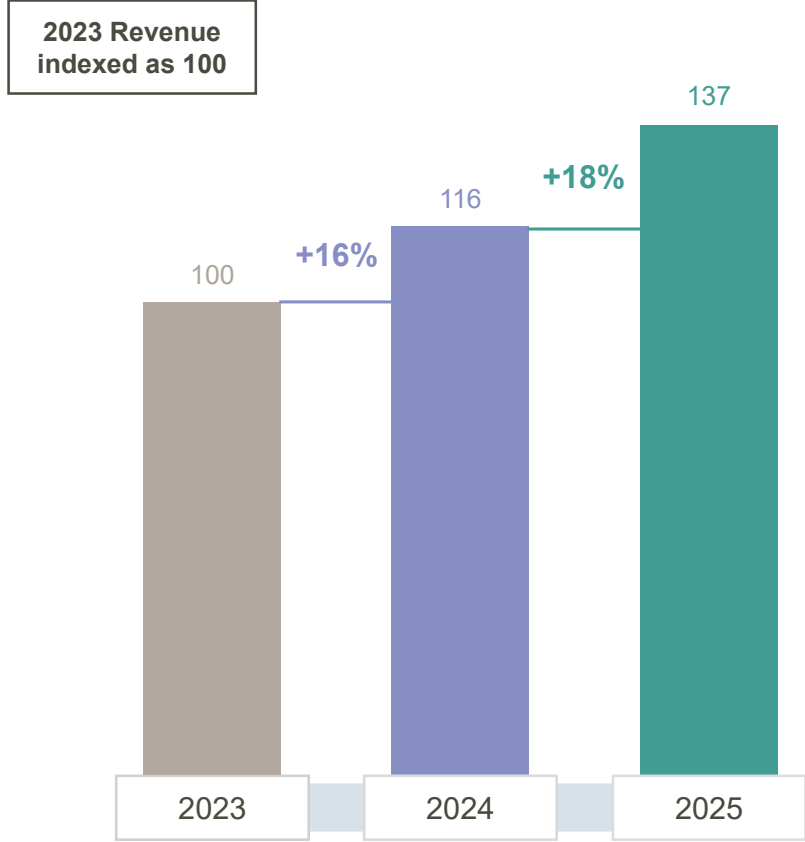


Revenue compared to previous year

Europe



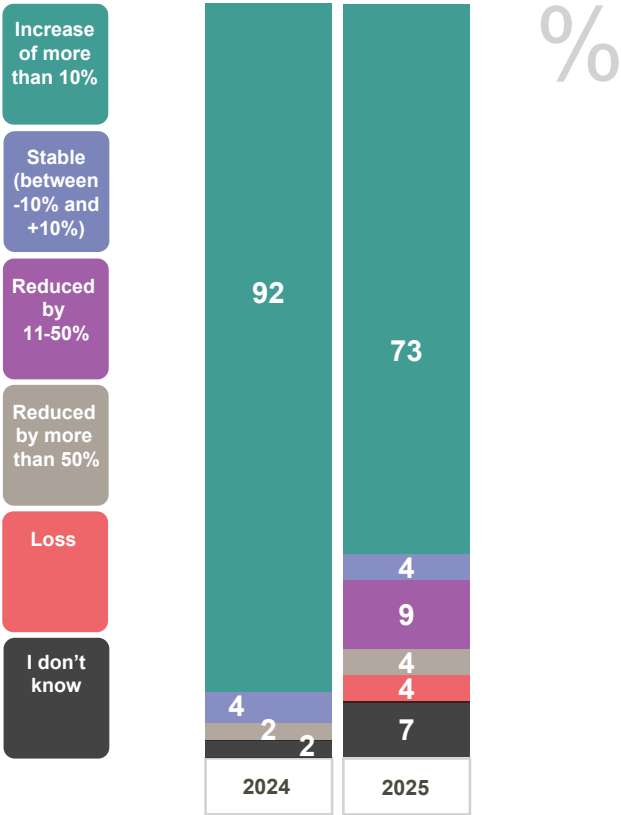
World



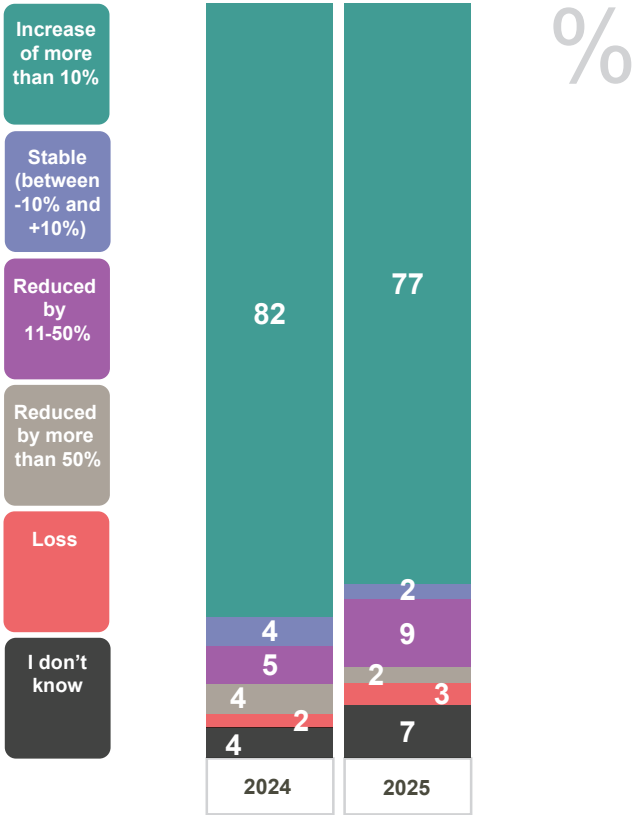


Operating profits compared to previous year

Europe

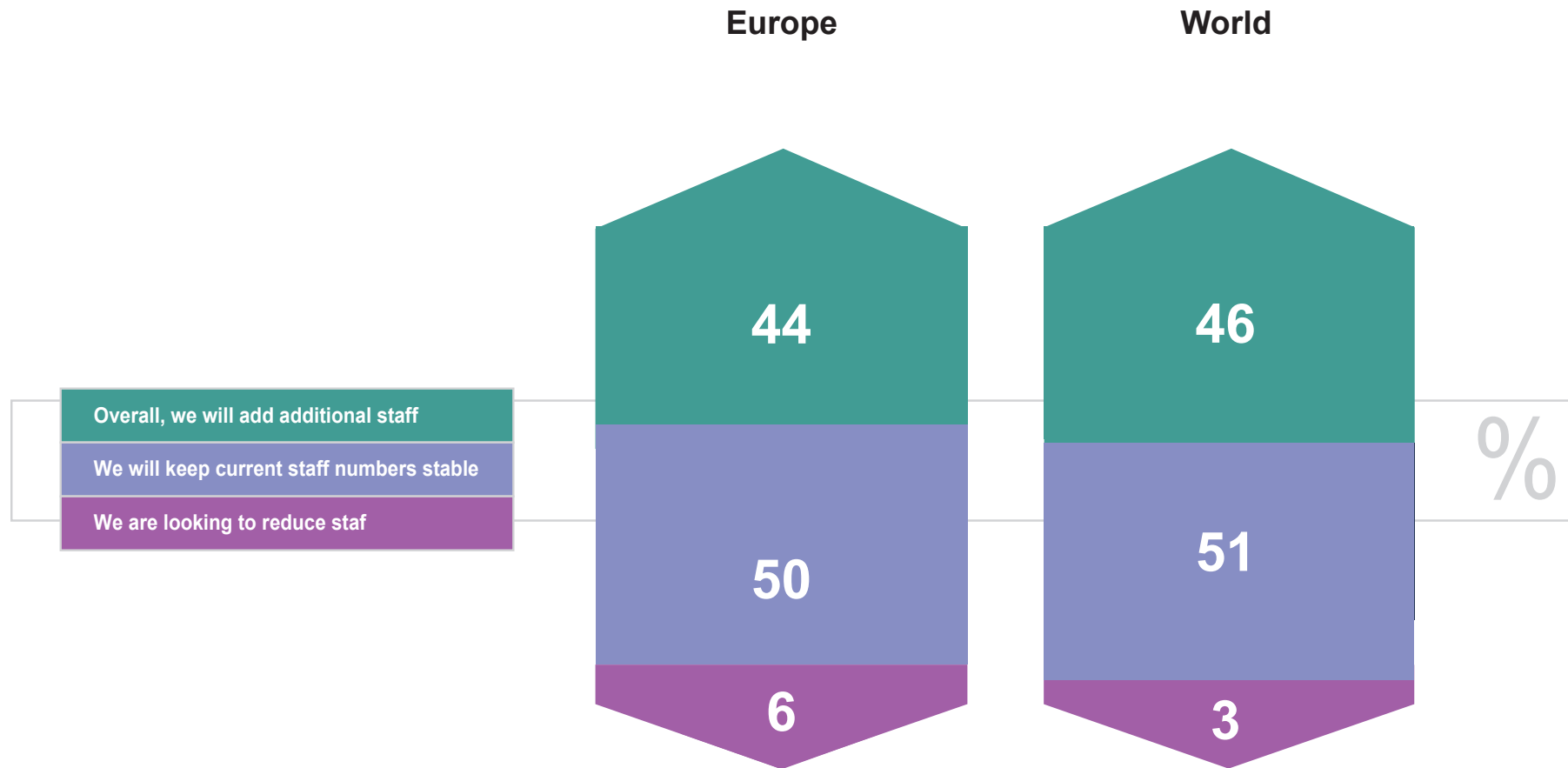


World





How do you plan to develop your workforce in the coming 6 months



Most Important Business Issues - Key Factors for Business Development - Europe

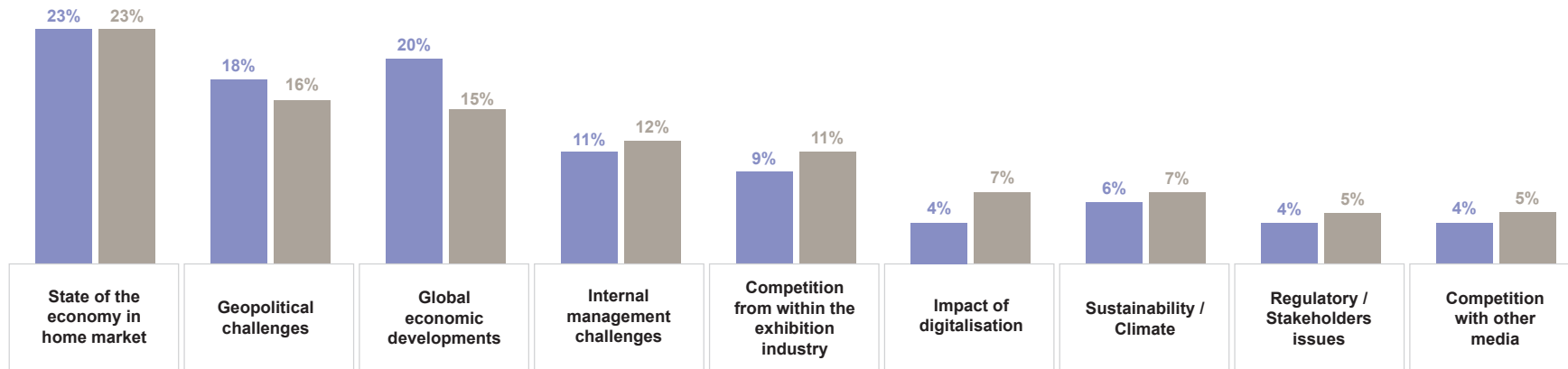


Most important business issues in the exhibition industry right now

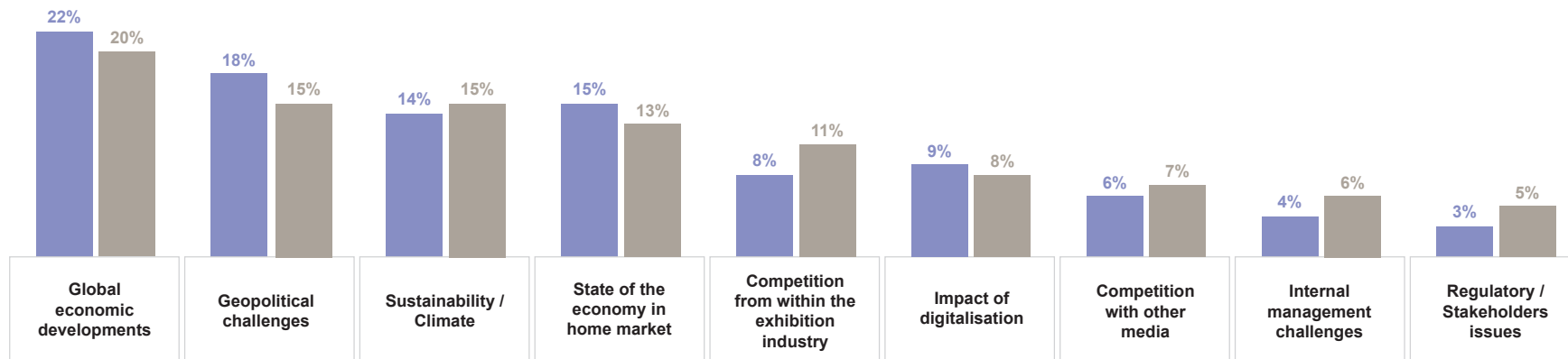
Short term (12-18 months)

Europe

Global



Mid-term (3-5 years)



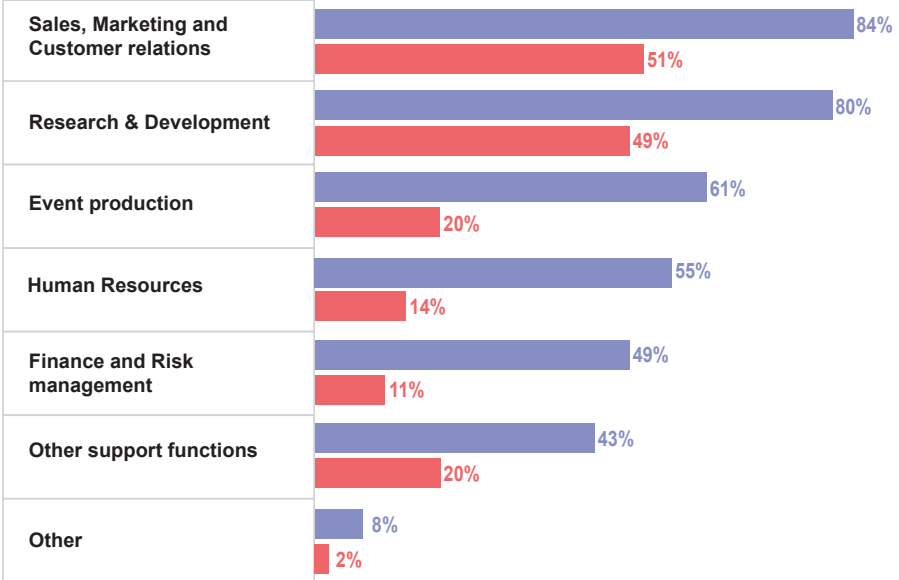


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

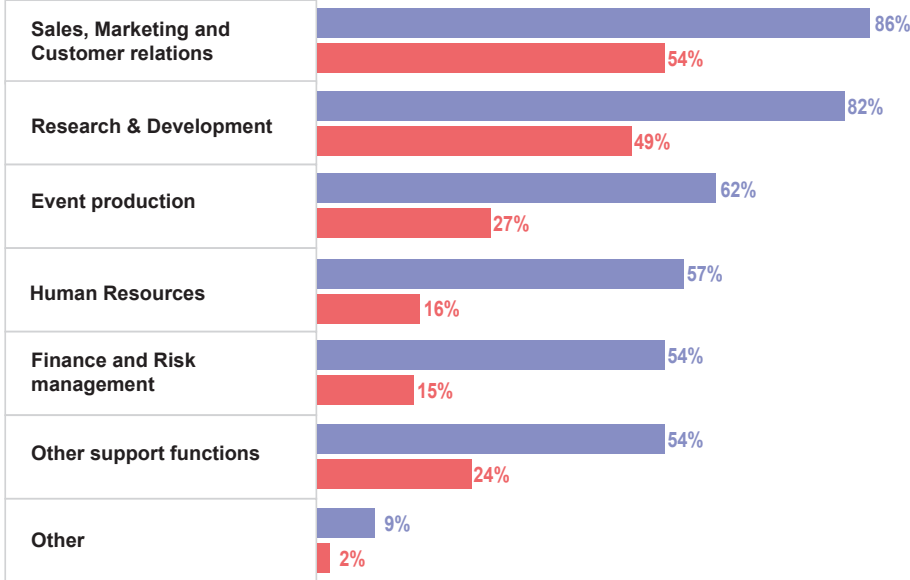
Will affect the industry

We already use

Europe

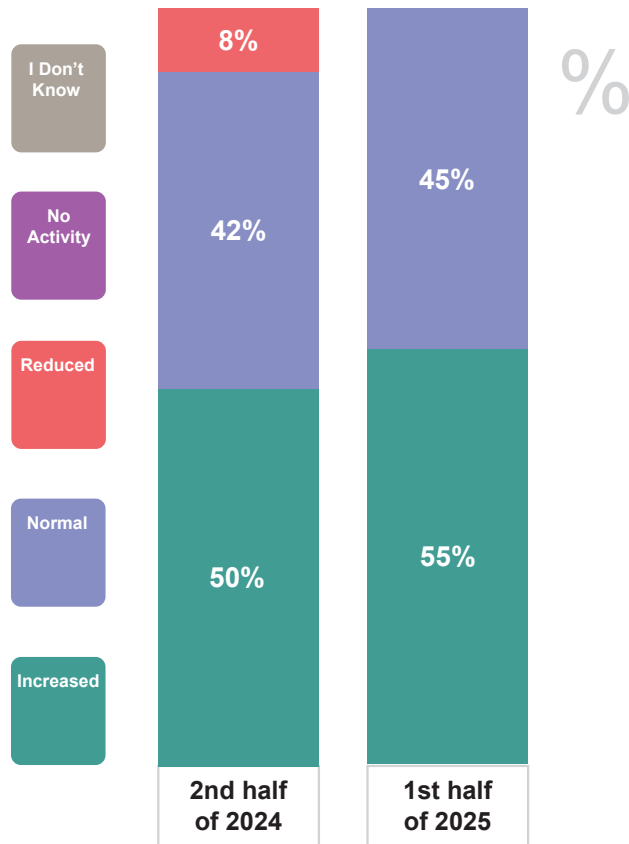


World

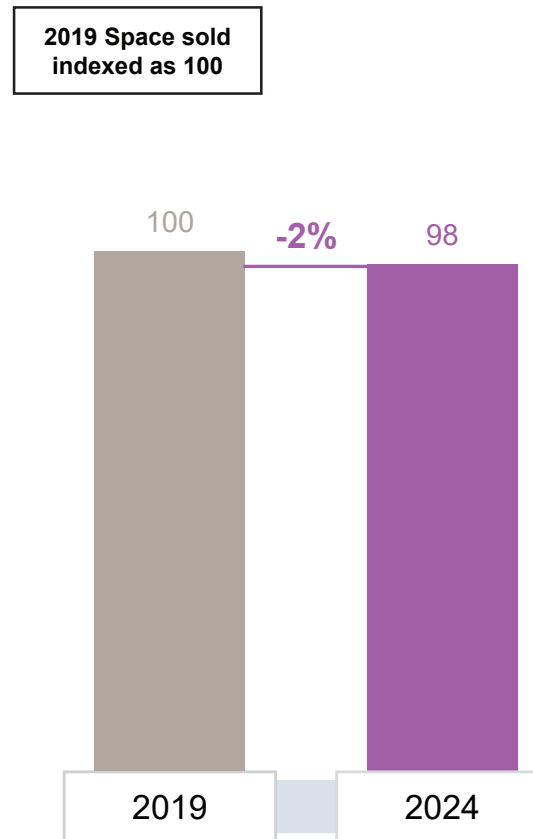




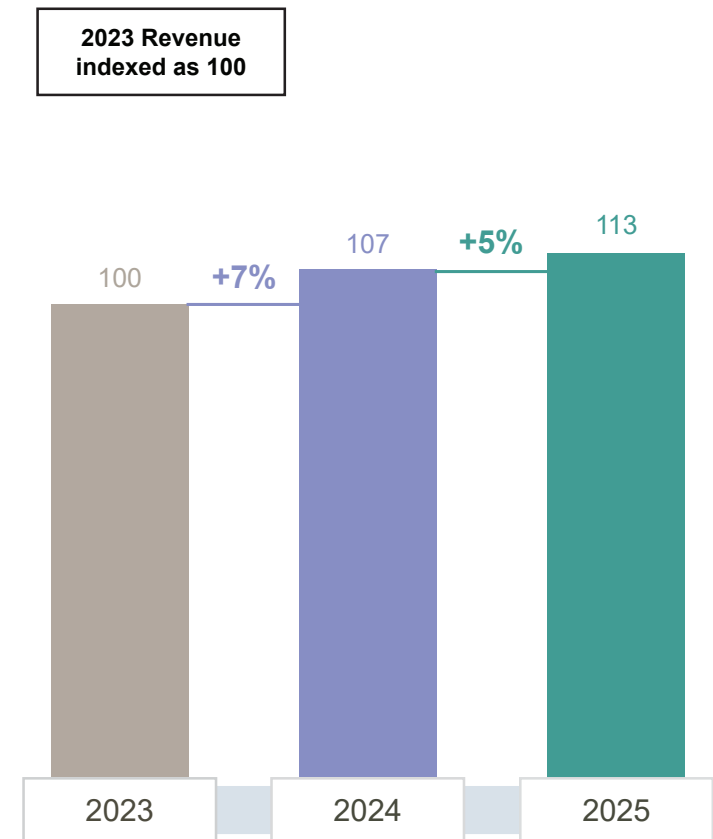
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

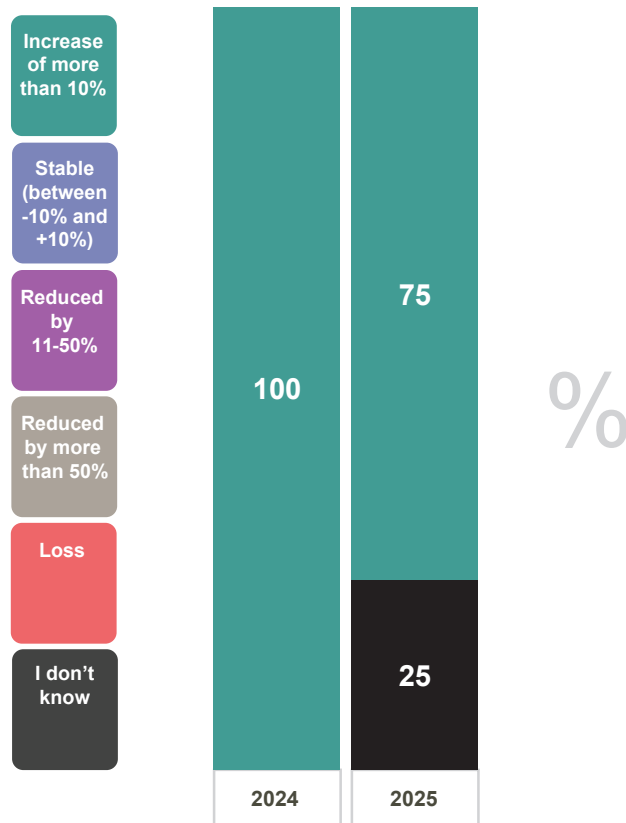


Revenue compared to previous year

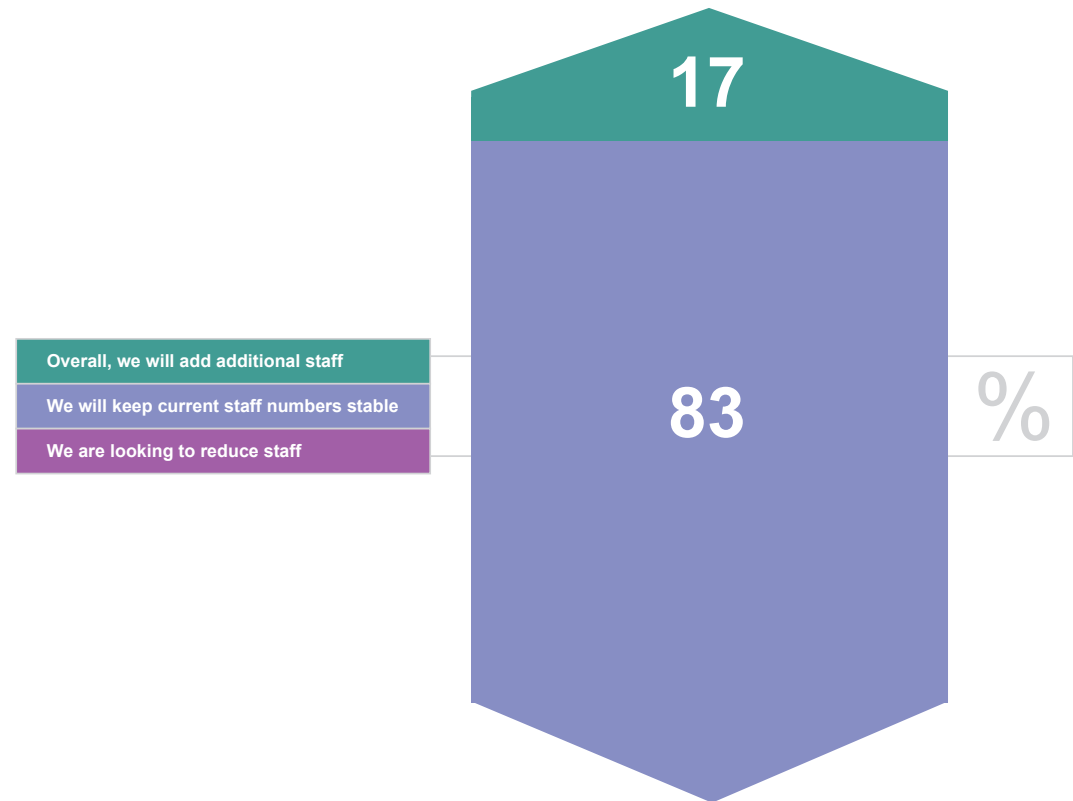




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months



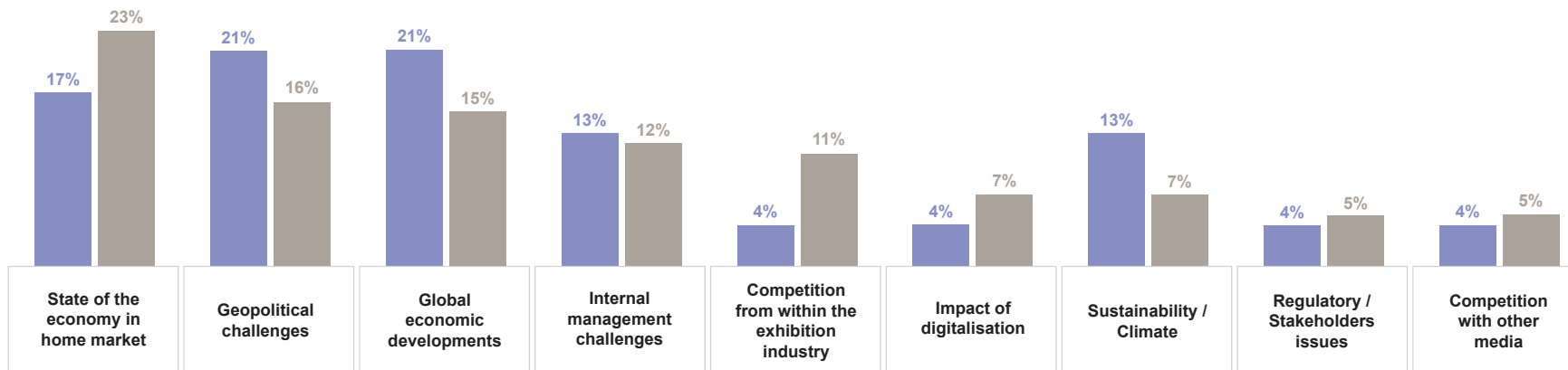


Most important business issues in the exhibition industry right now

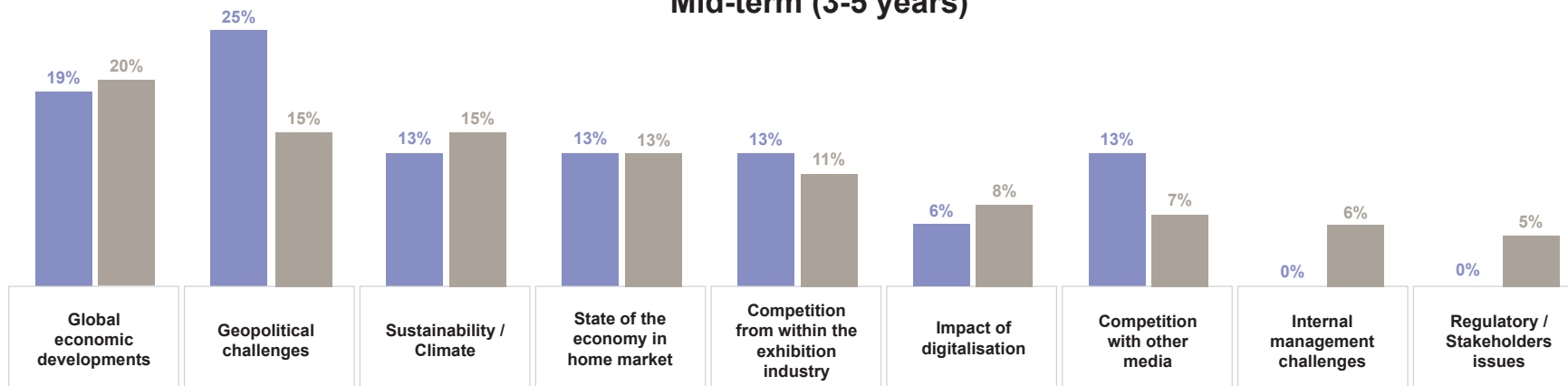
Short term (12-18 months)

France

Global

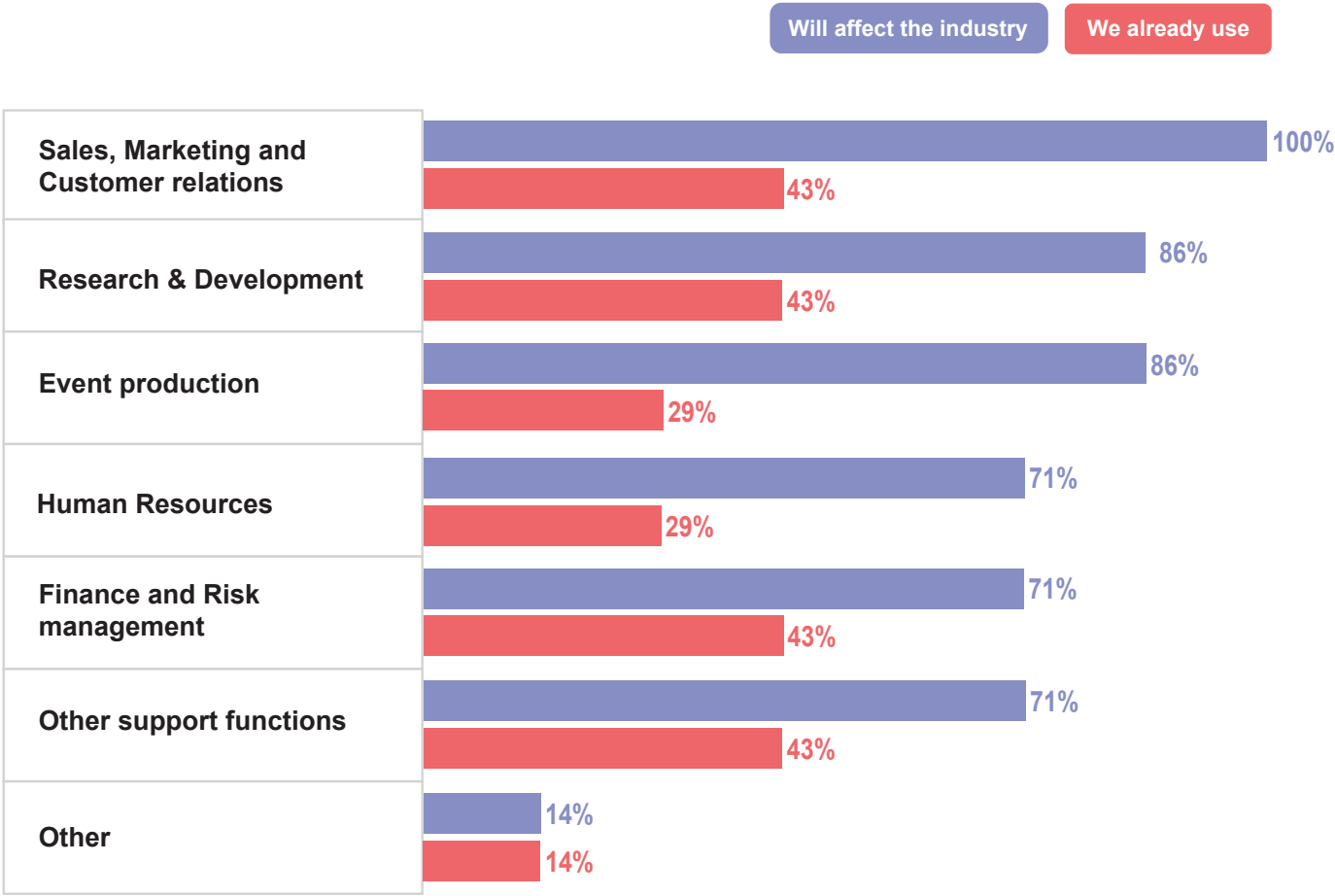


Mid-term (3-5 years)





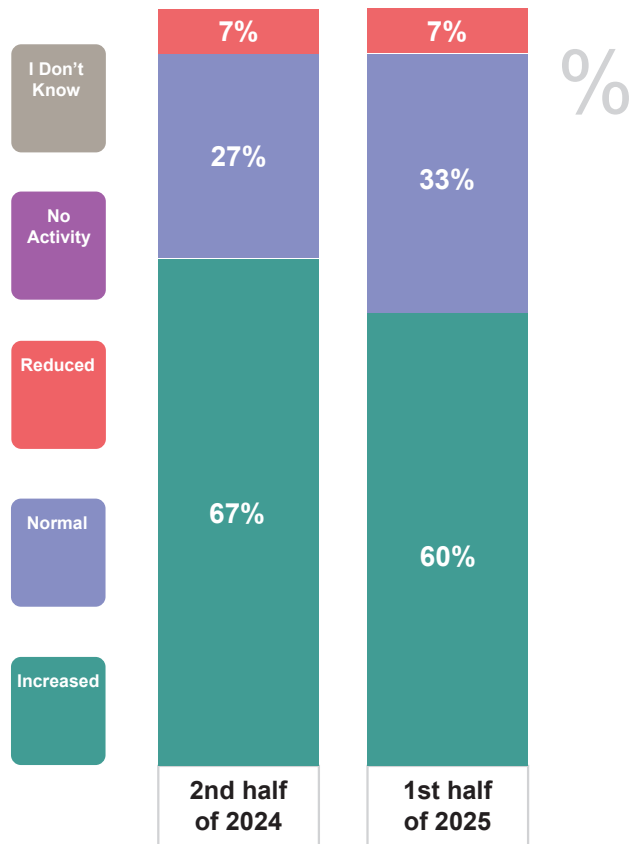
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



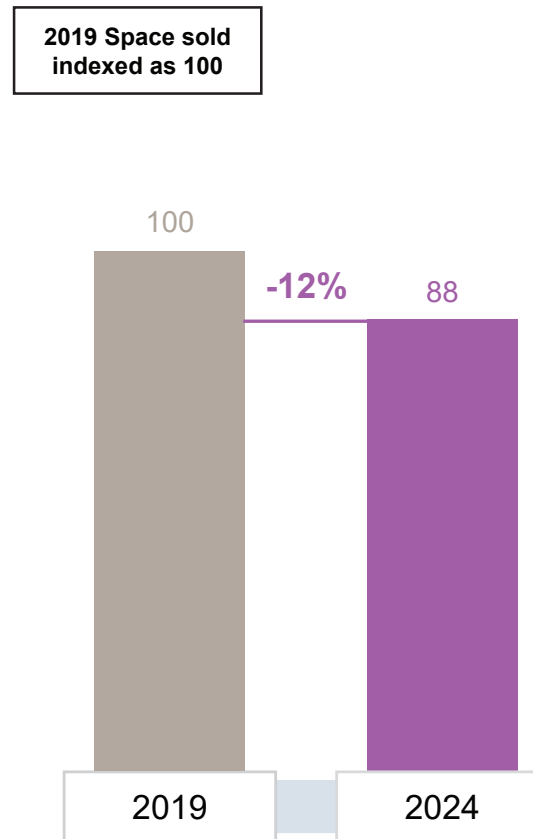
Detailed results for Germany



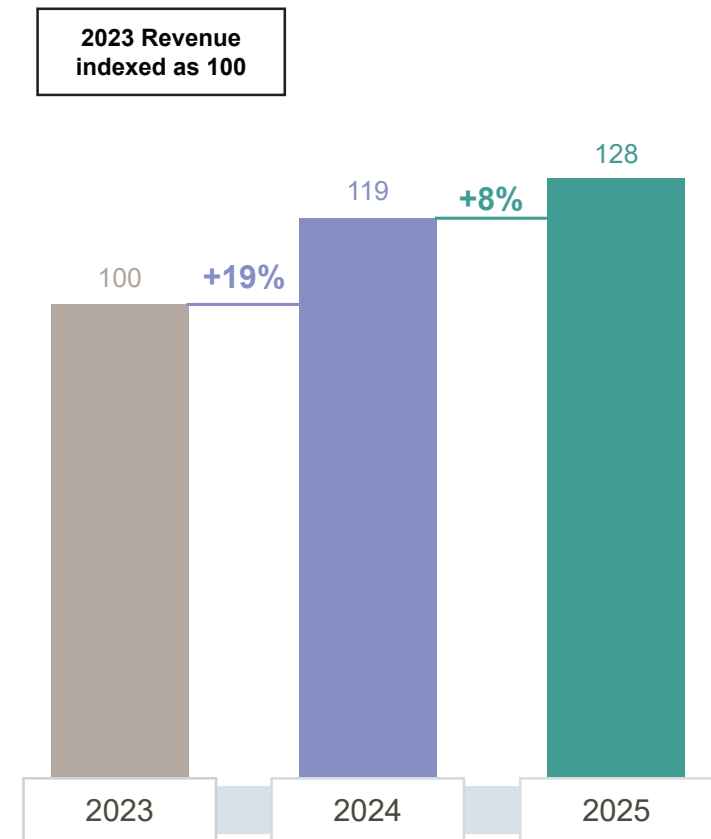
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

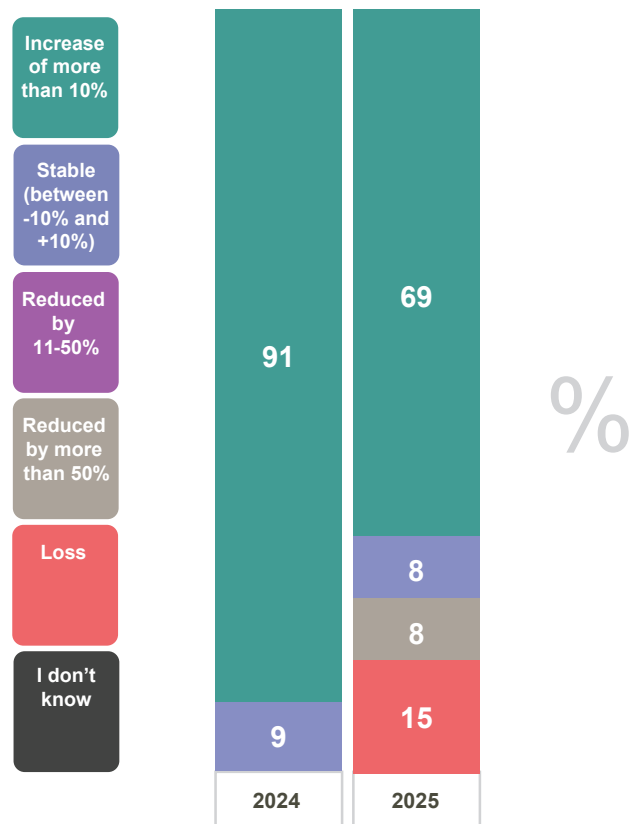


Revenue compared to previous year

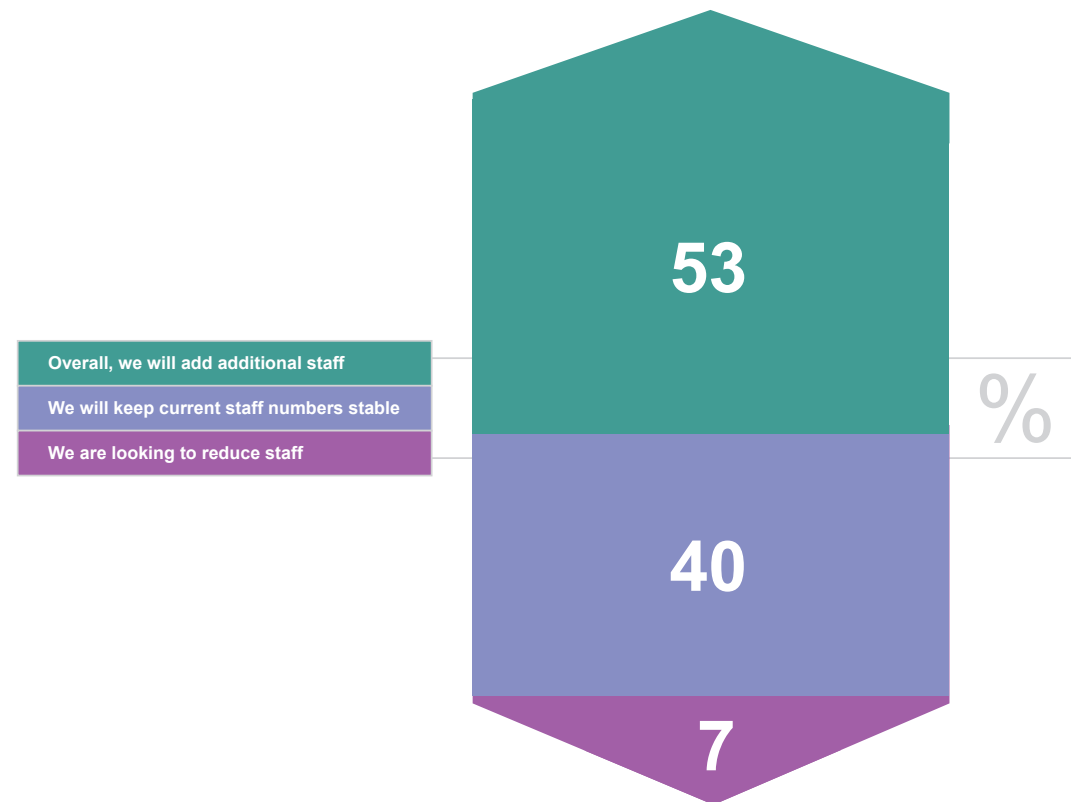




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

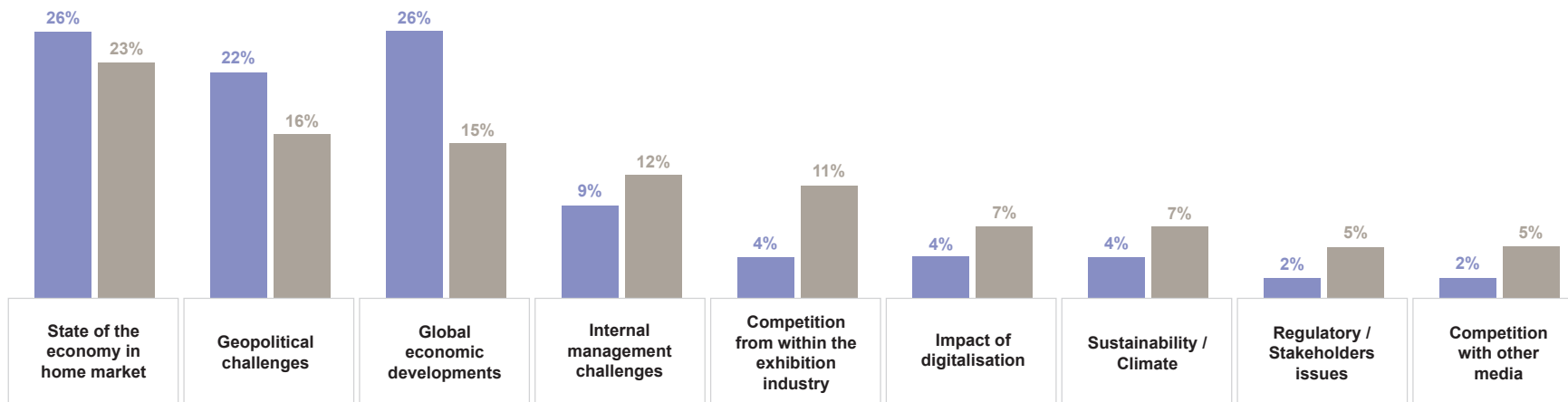




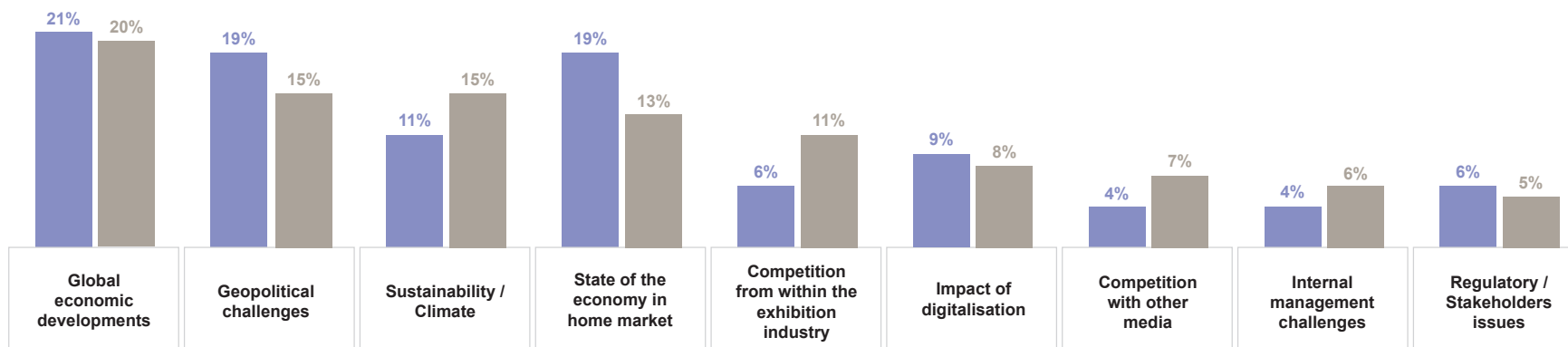
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Germany Global

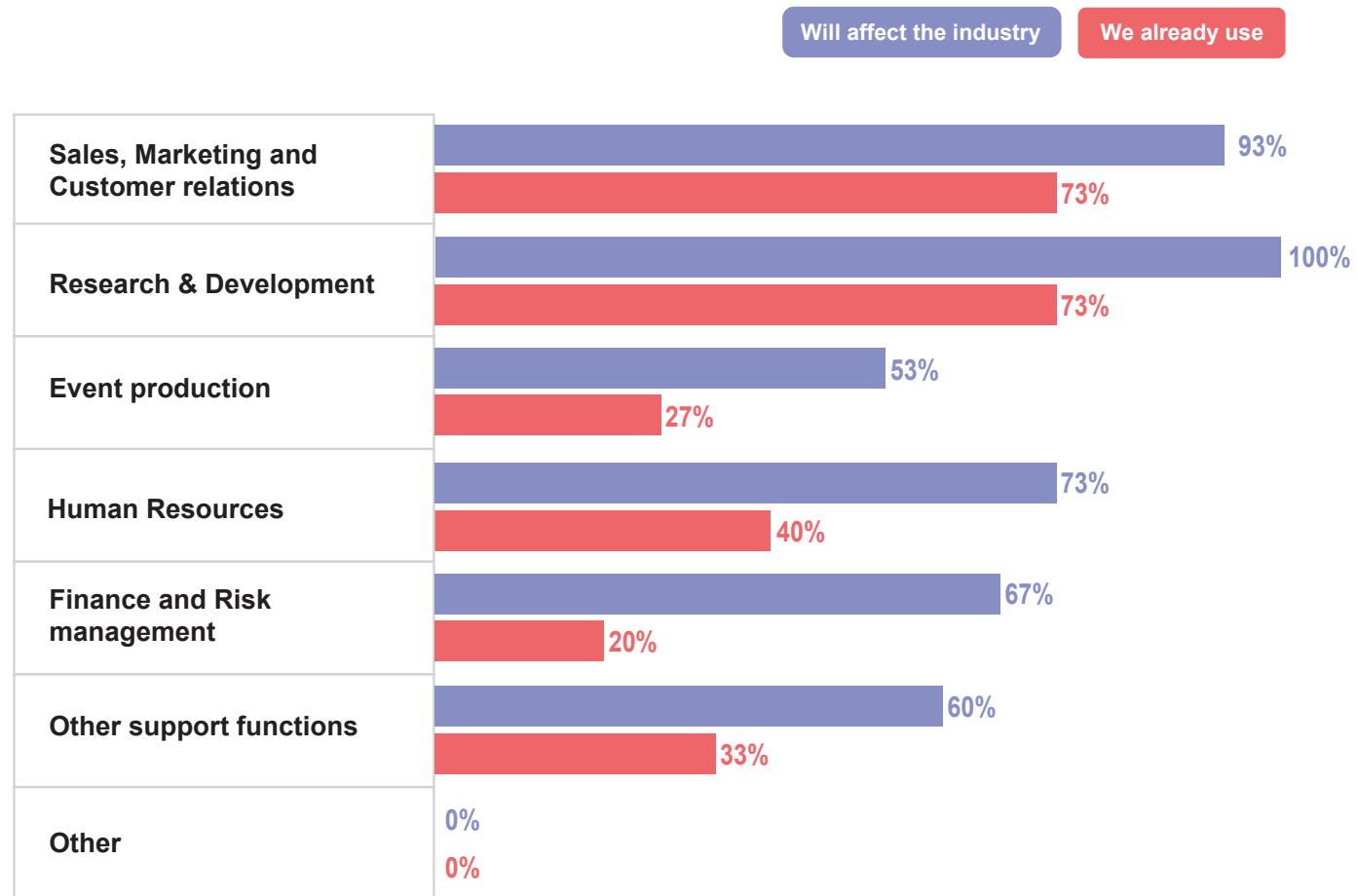


Mid-term (3-5 years)





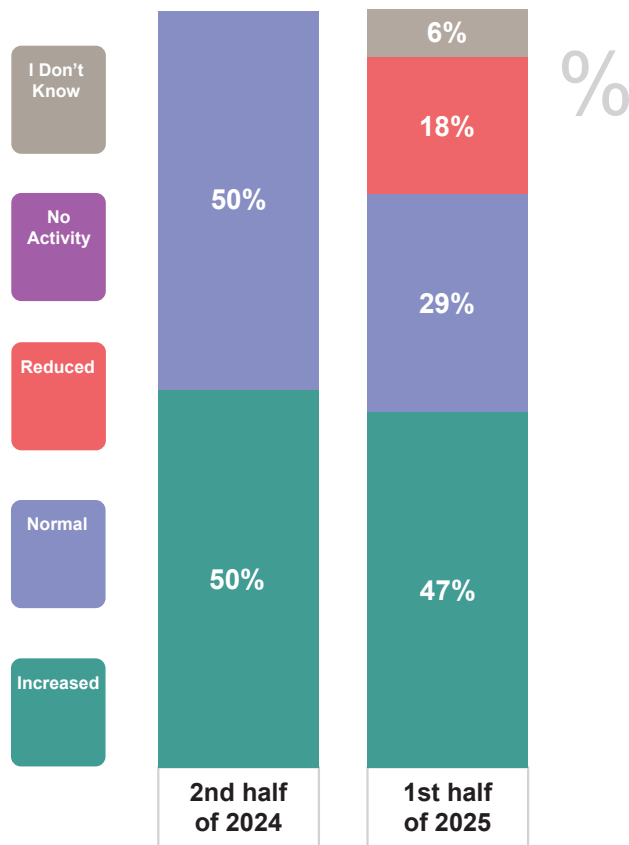
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



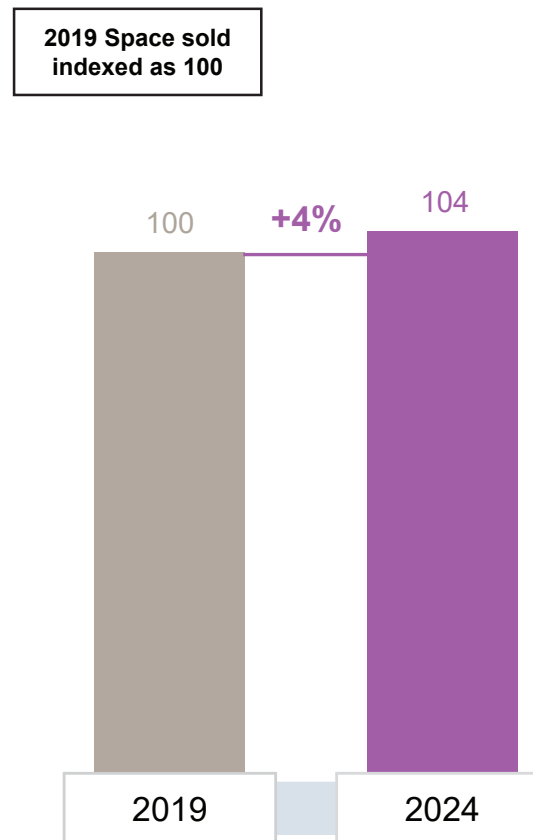
Detailed results for Greece



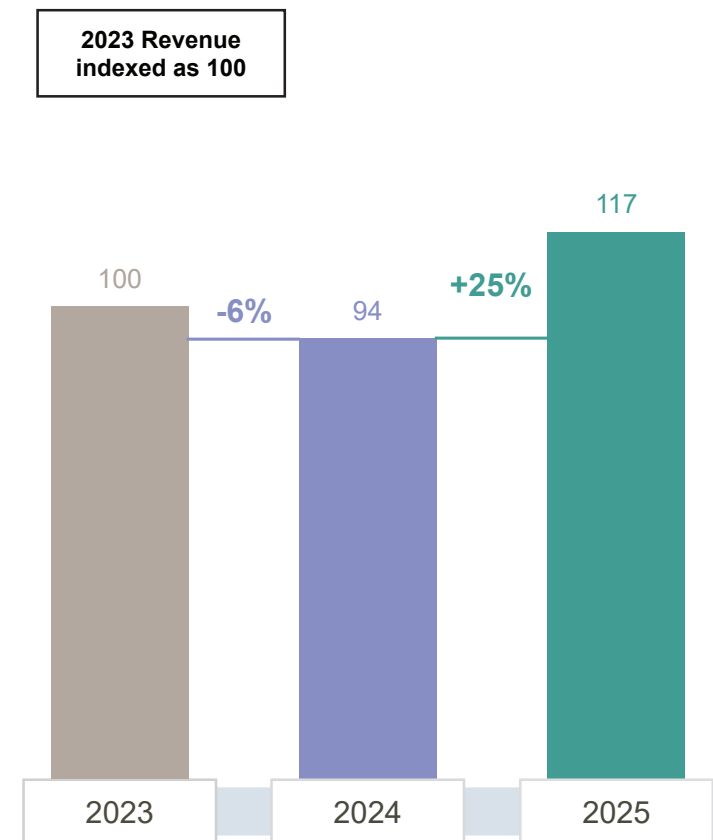
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

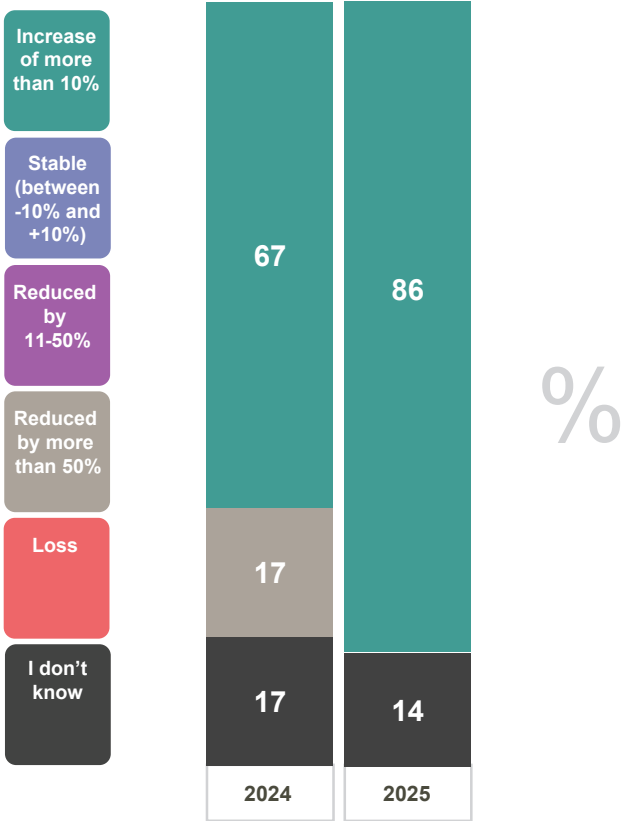


Revenue compared to previous year

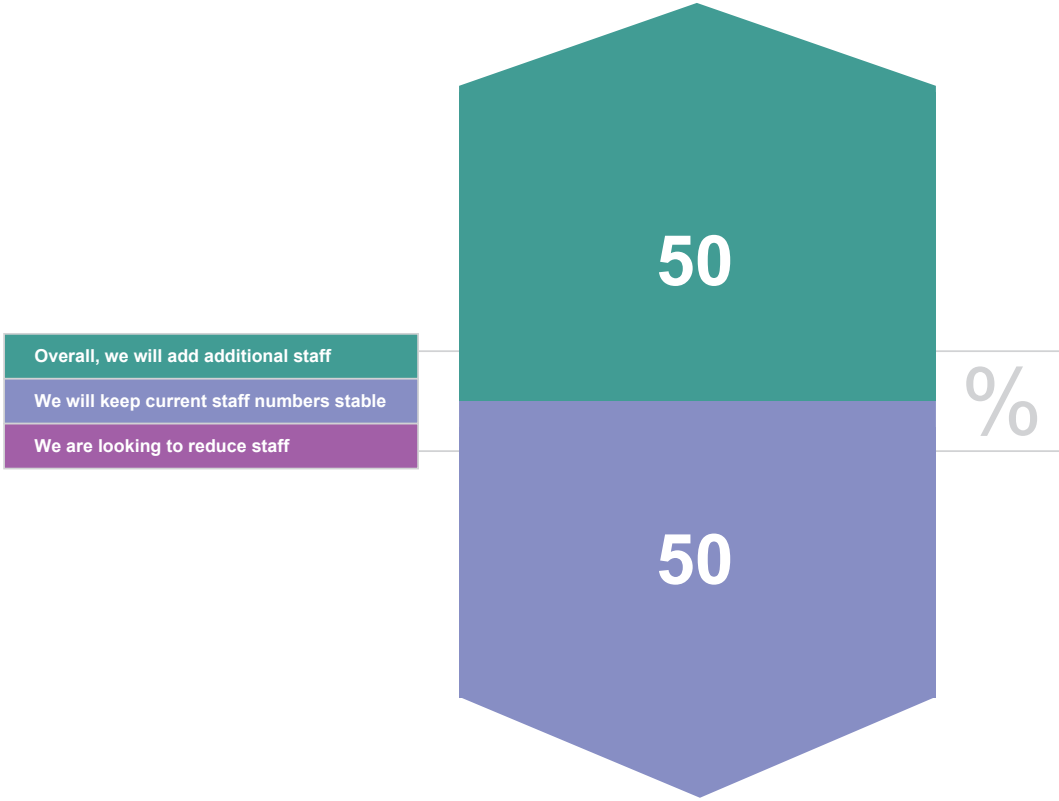




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

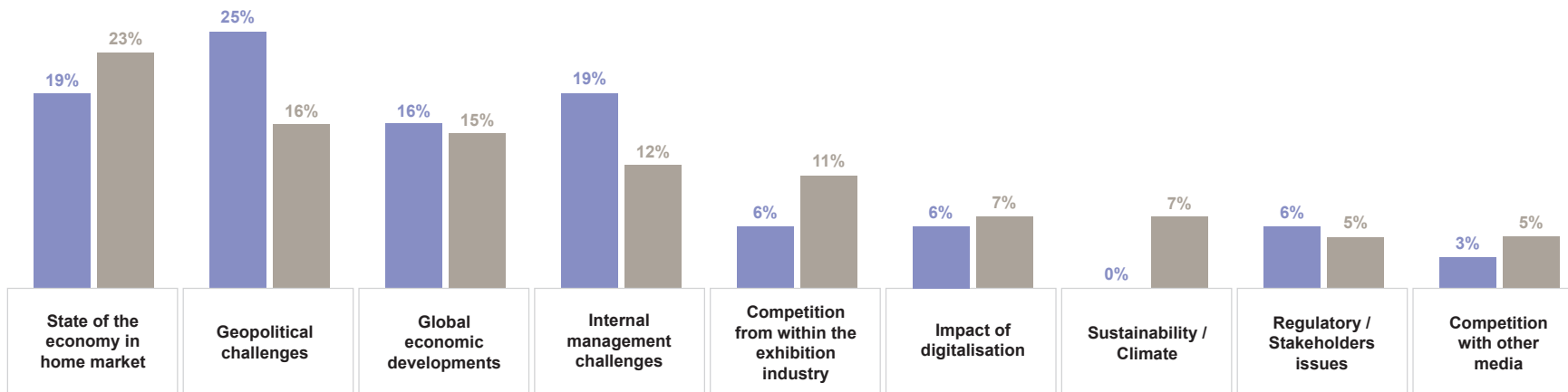




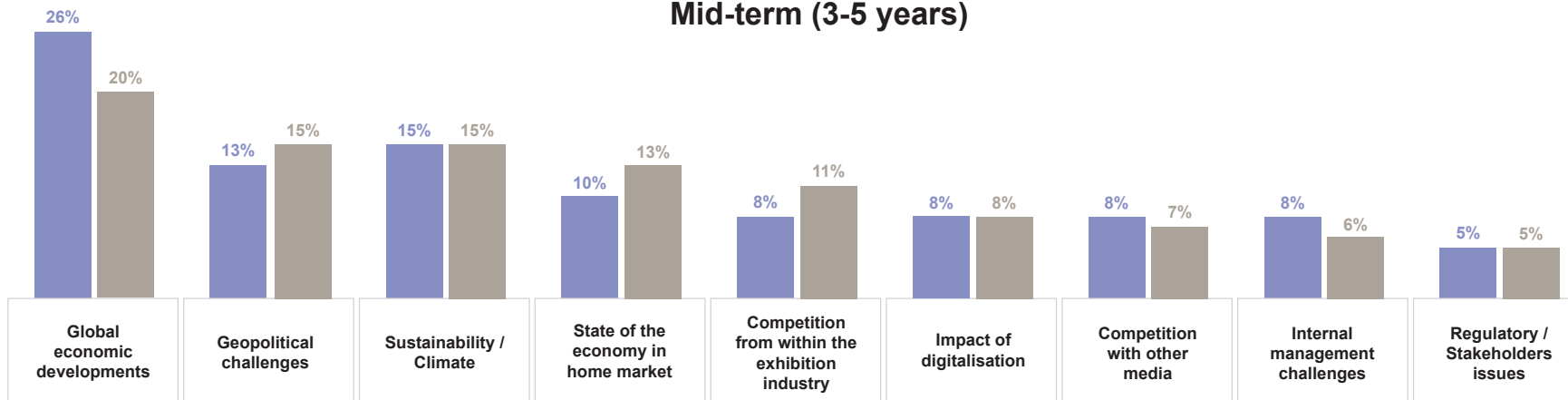
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Greece Global

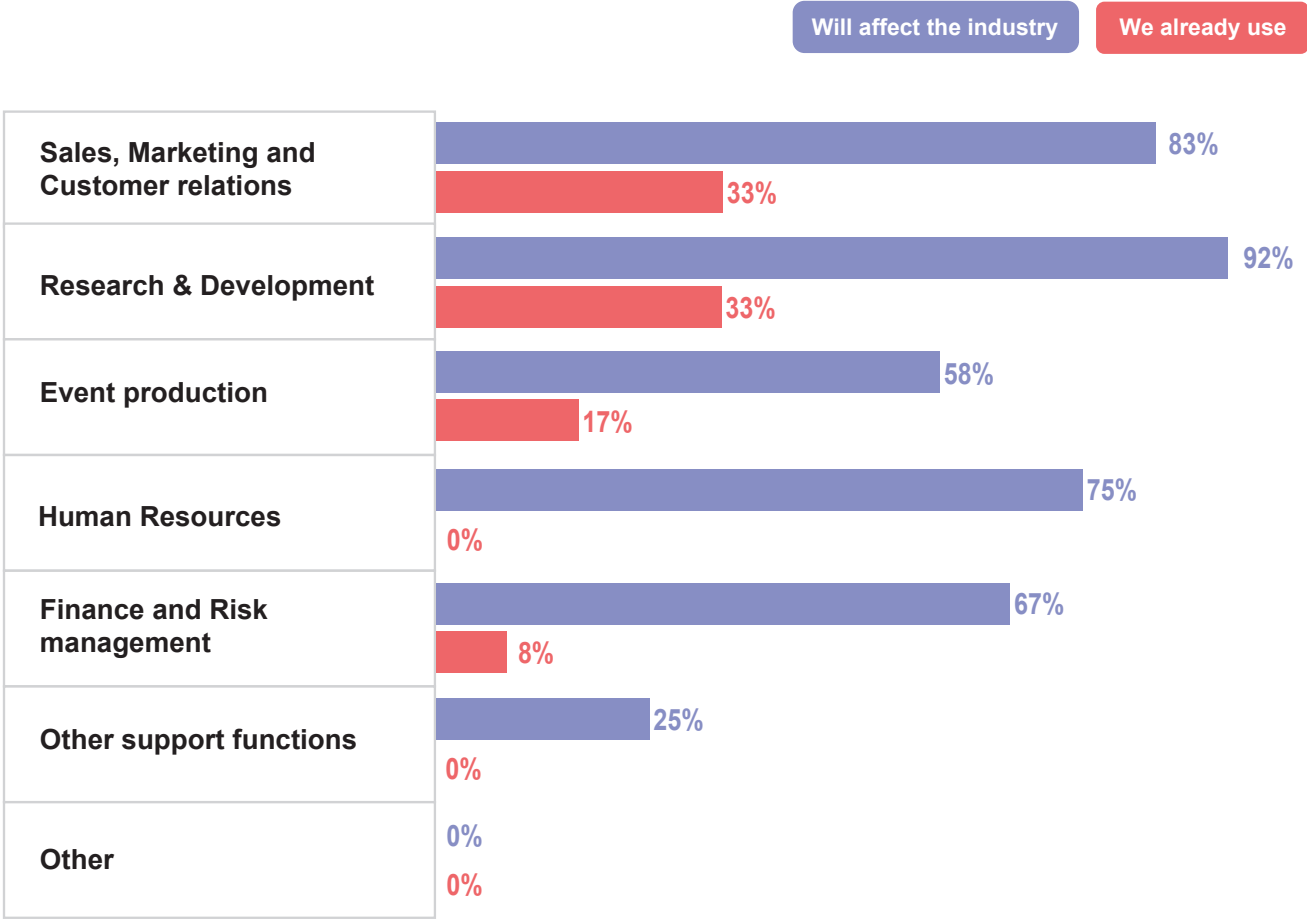


Mid-term (3-5 years)



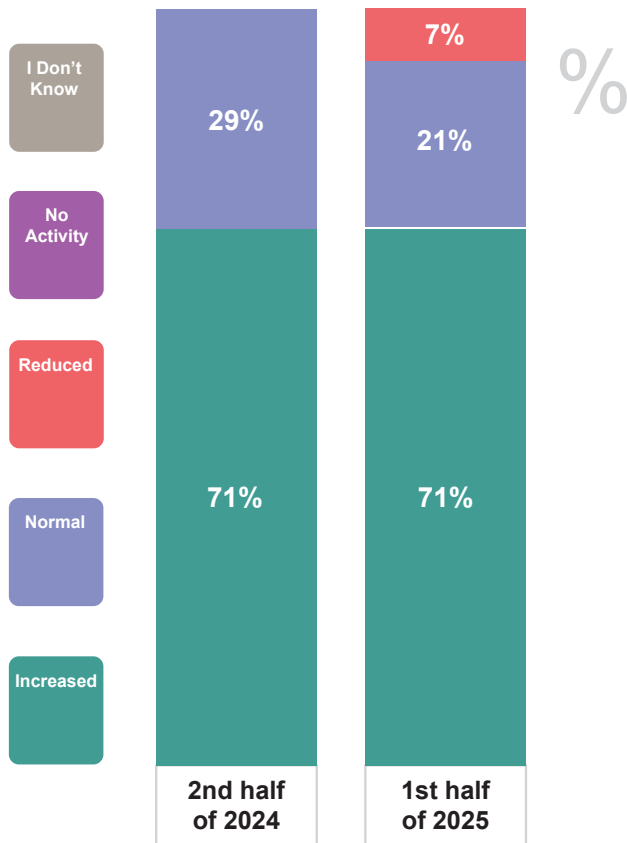


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

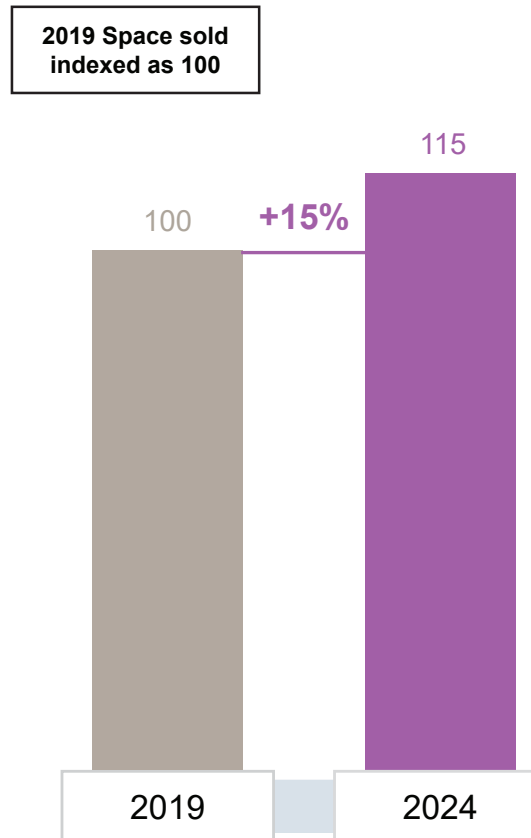




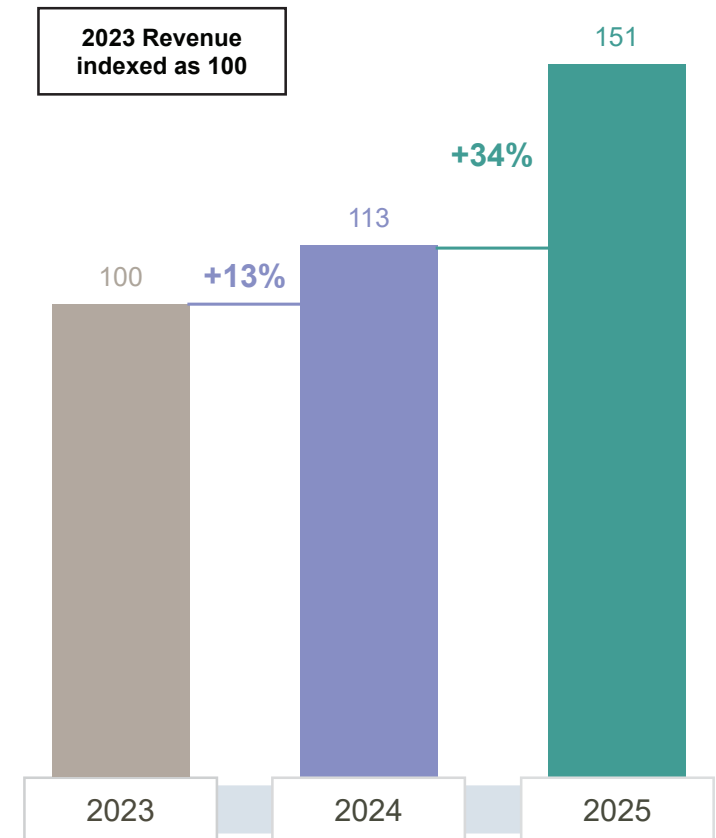
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



Revenue compared to previous year

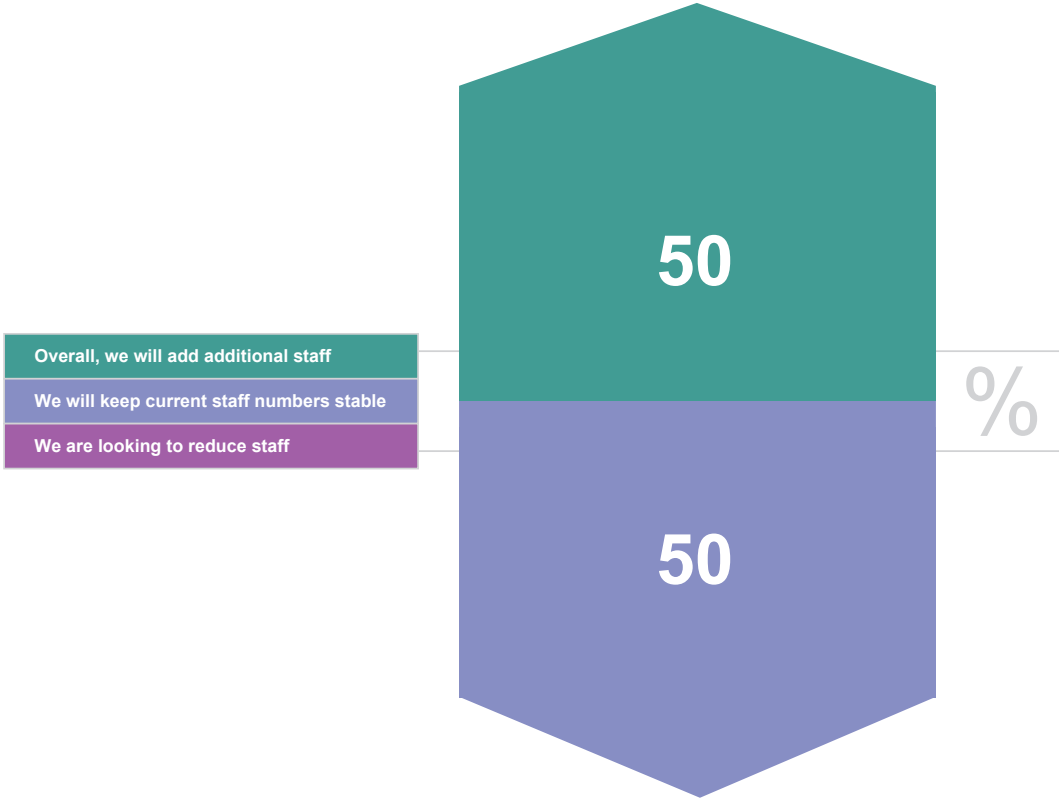




Operating profits compared to the previous year and others

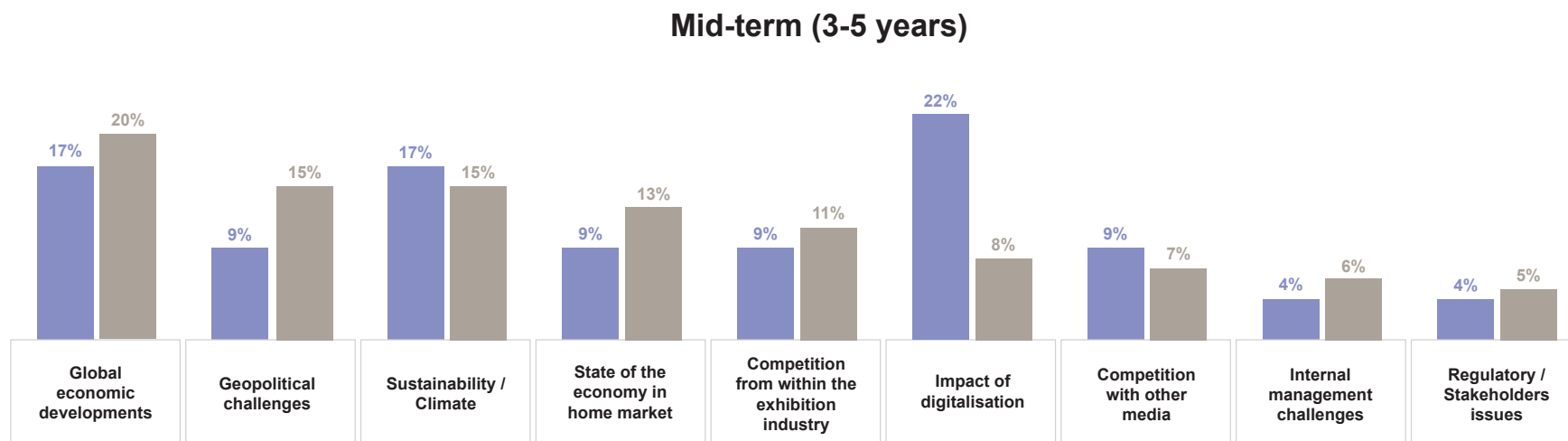
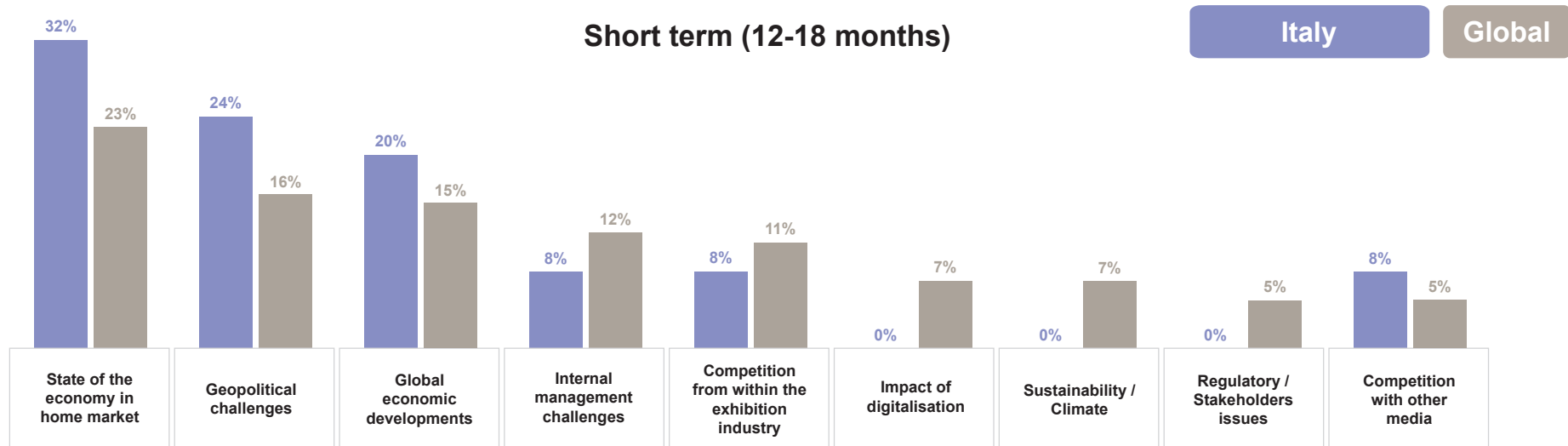


How do you plan to develop your workforce in the coming 6 months



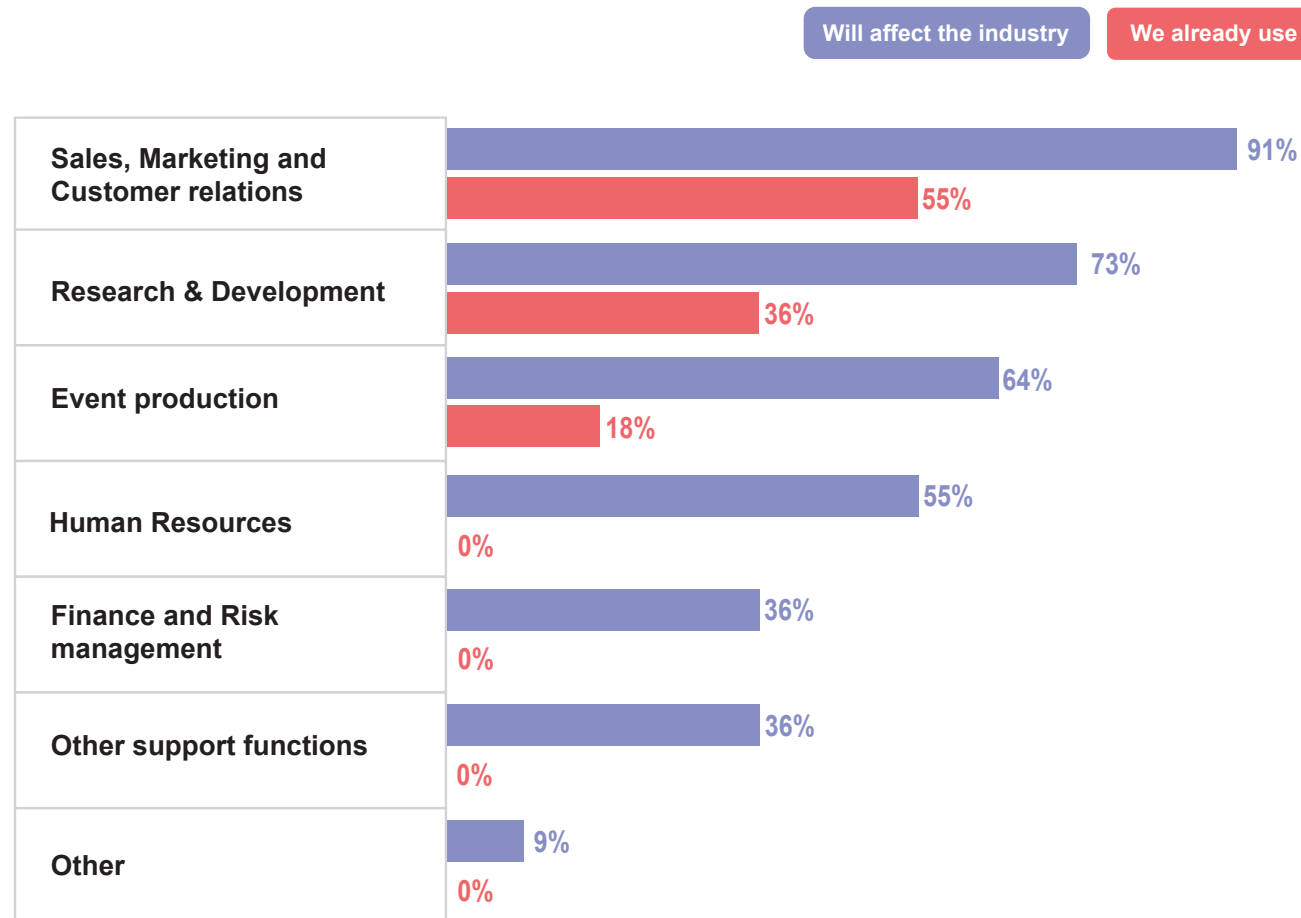


Most important business issues in the exhibition industry right now





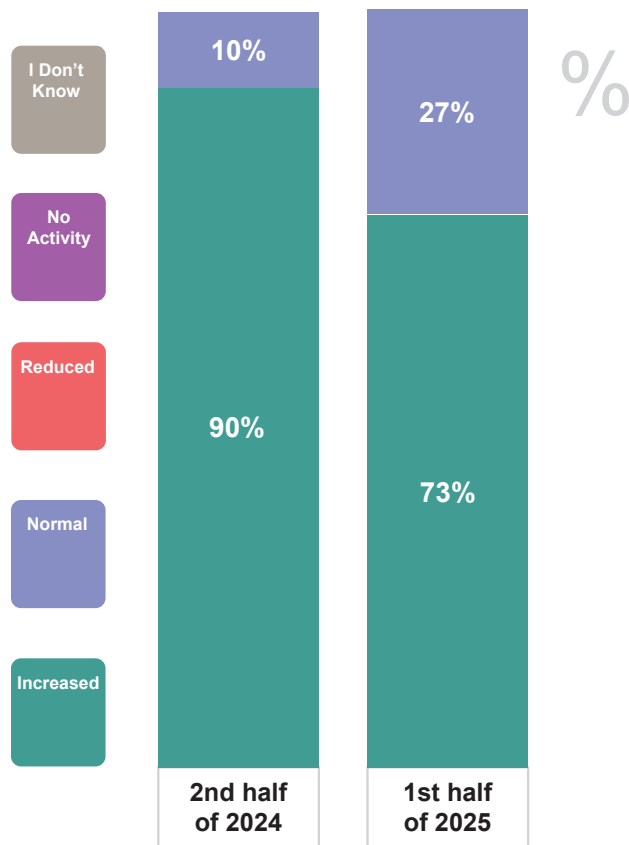
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



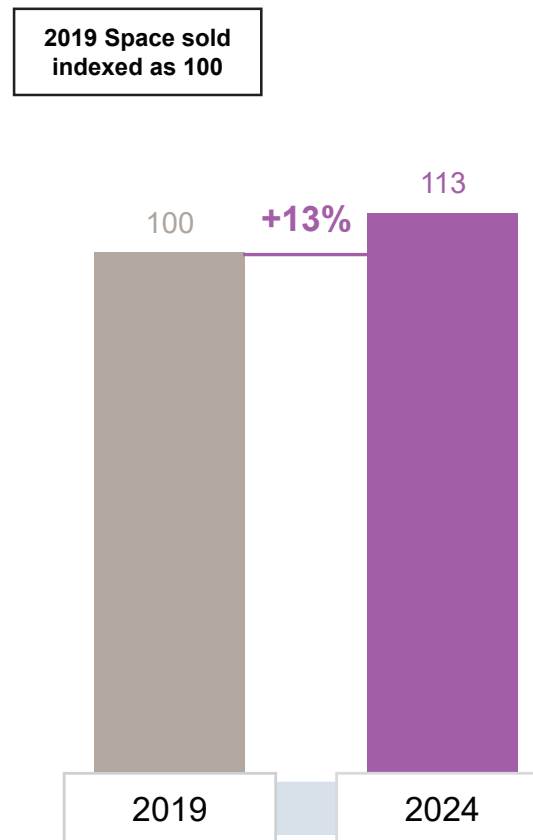
Detailed results for Spain



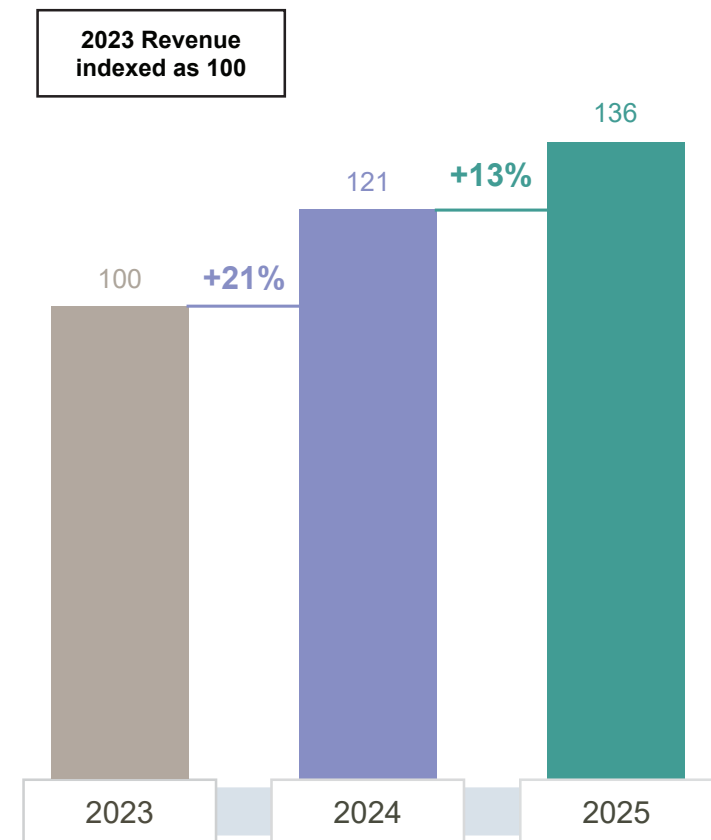
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



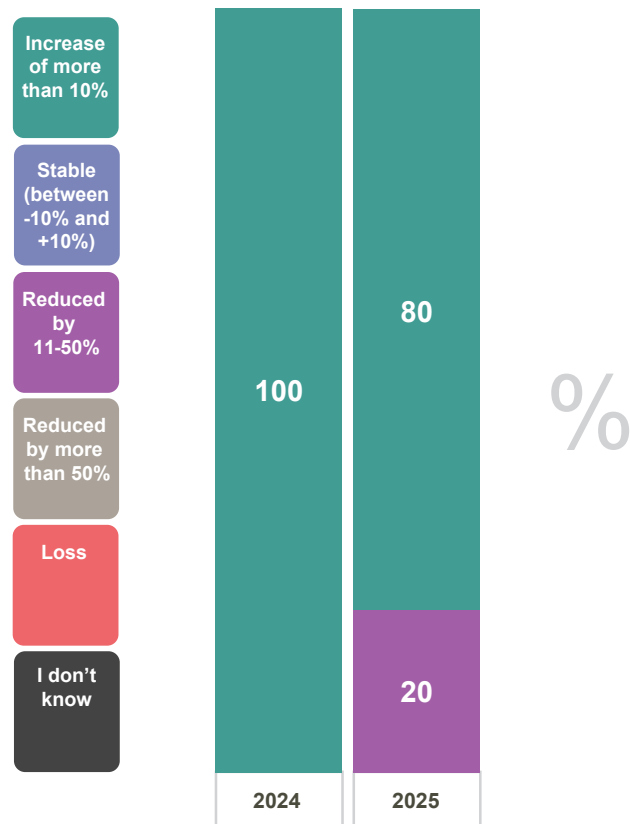
Revenue compared to previous year



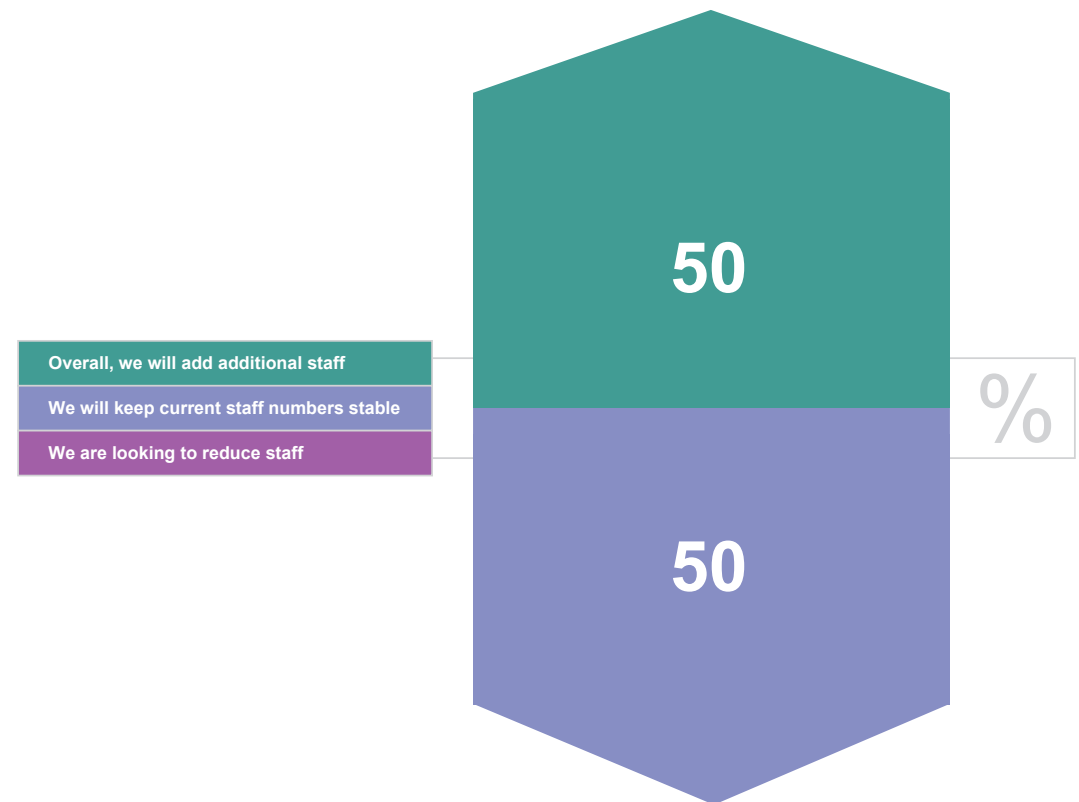
Detailed results for Spain



Operating profits compared to the previous year and others

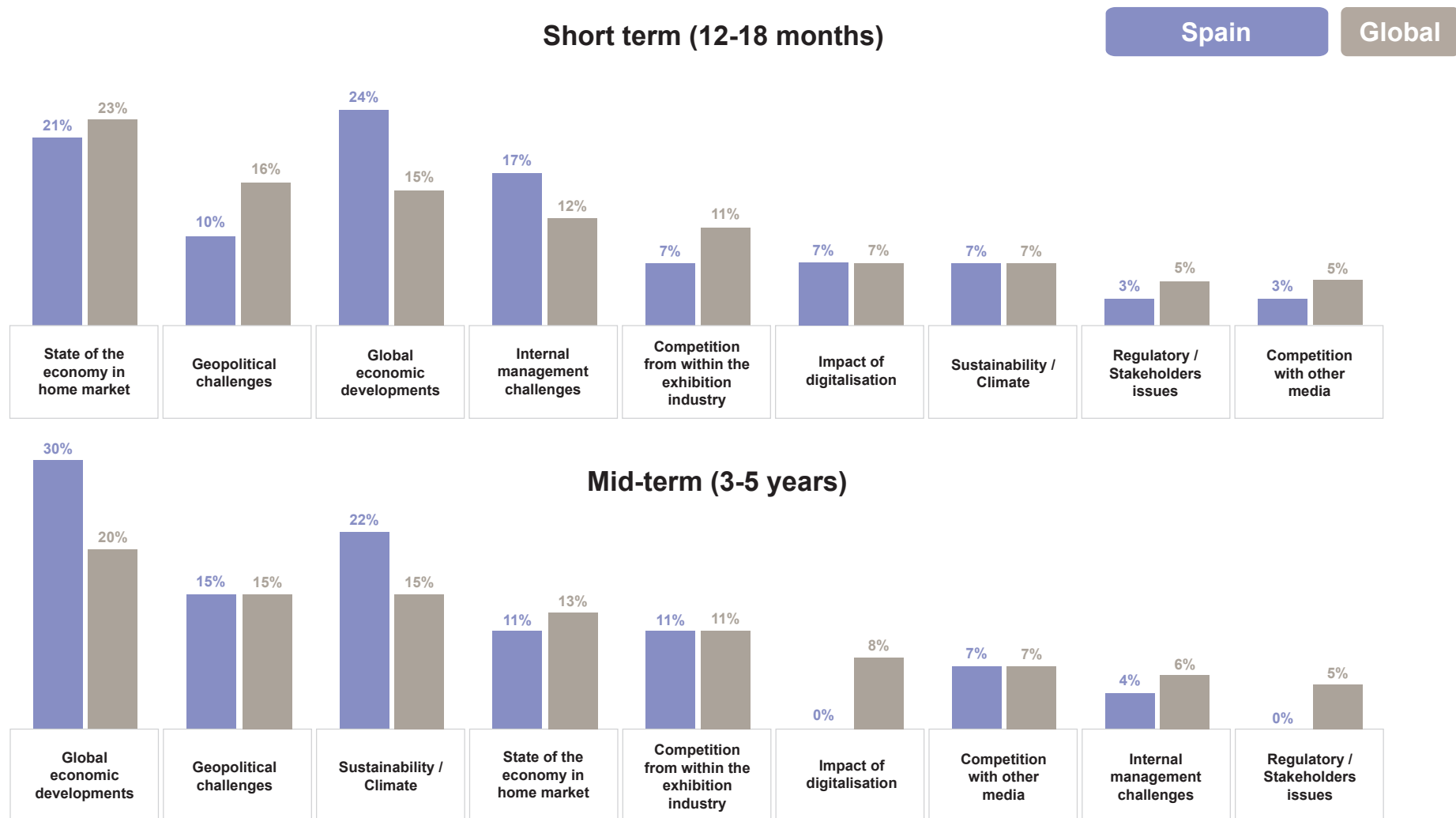


How do you plan to develop your workforce in the coming 6 months



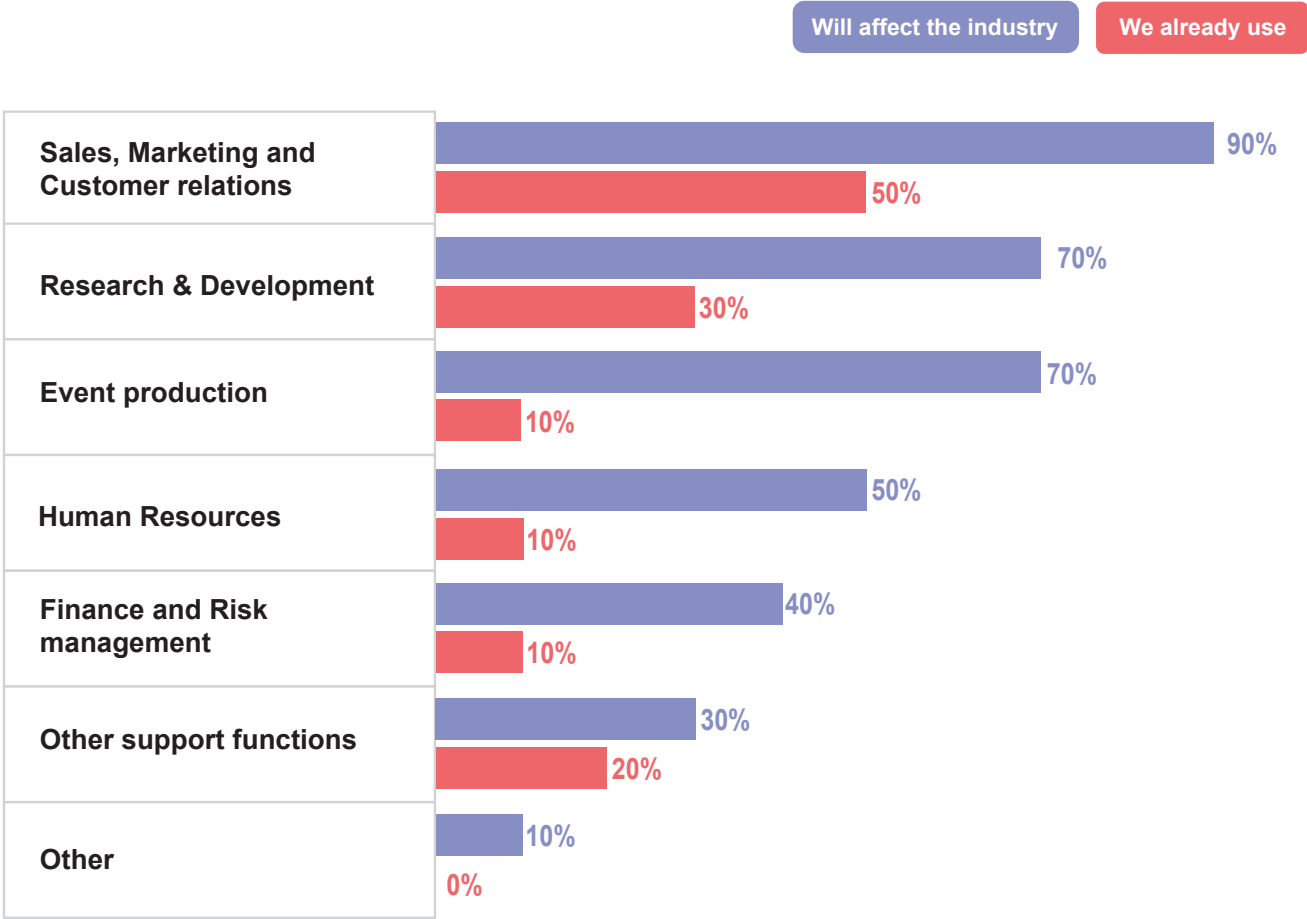


Most important business issues in the exhibition industry right now



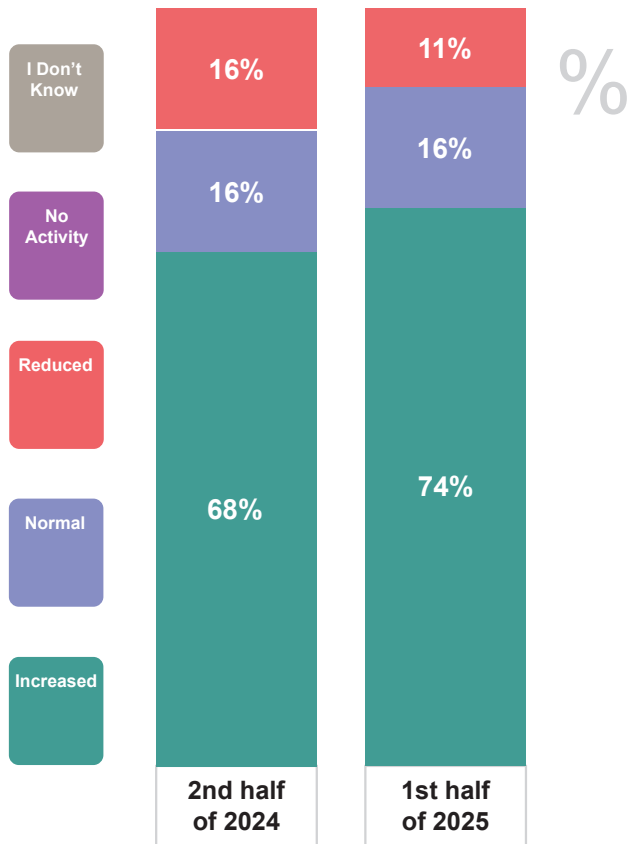


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

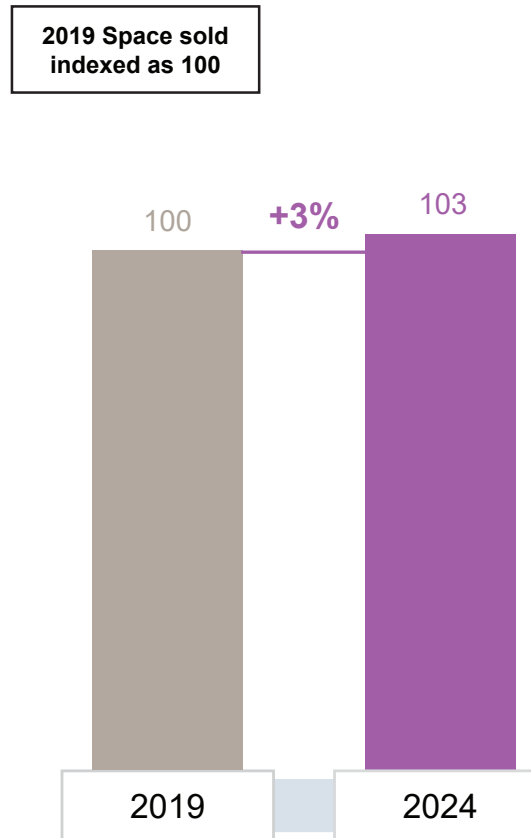




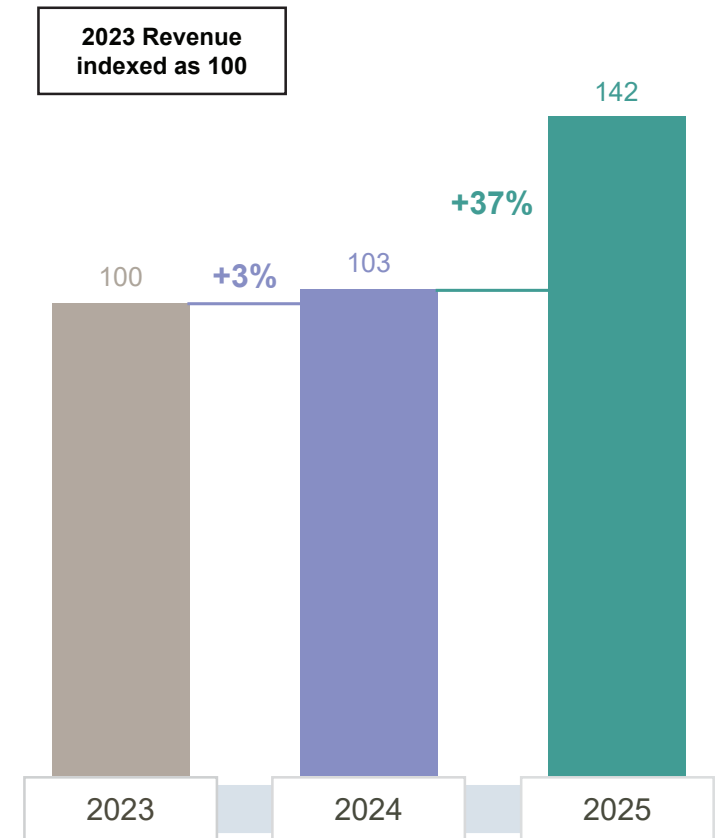
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



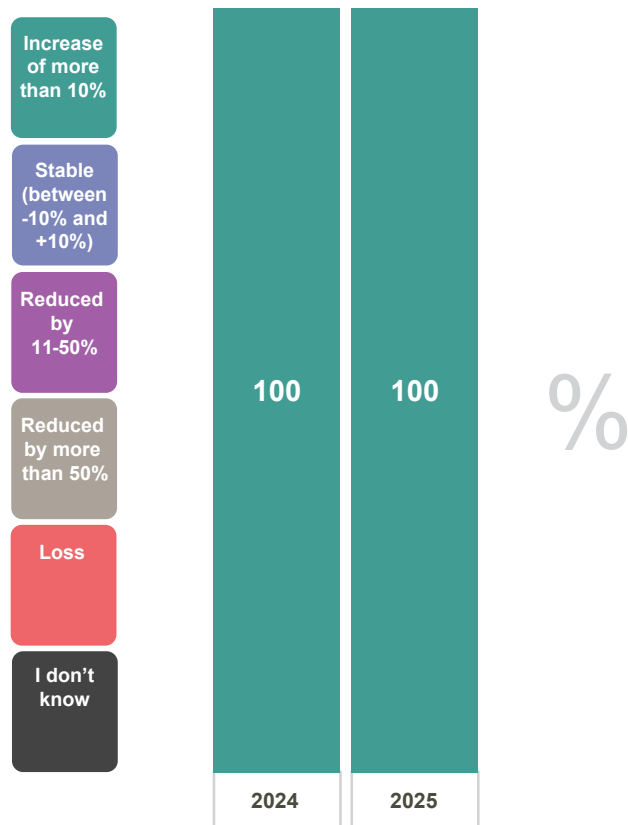
Revenue compared to previous year



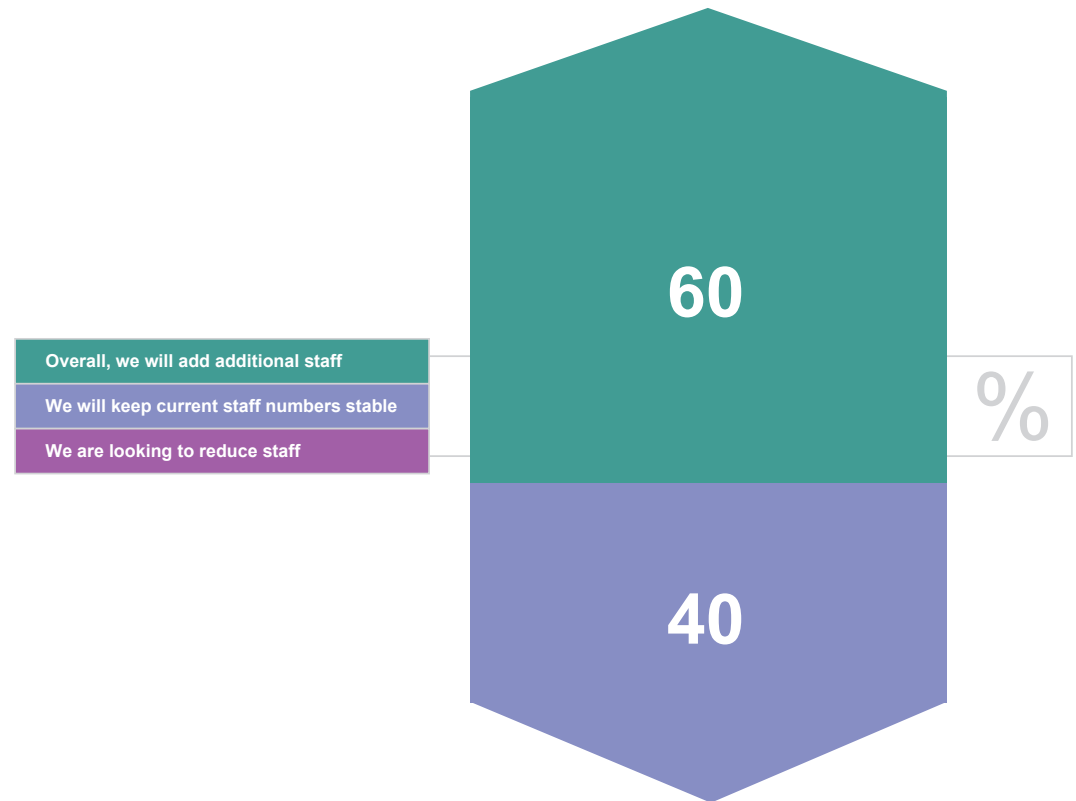
Some biennial aspects impacted the UK results for 2025 revenue compared to 2024. Omitting these would give a figure of +17%, and not +37%.



Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

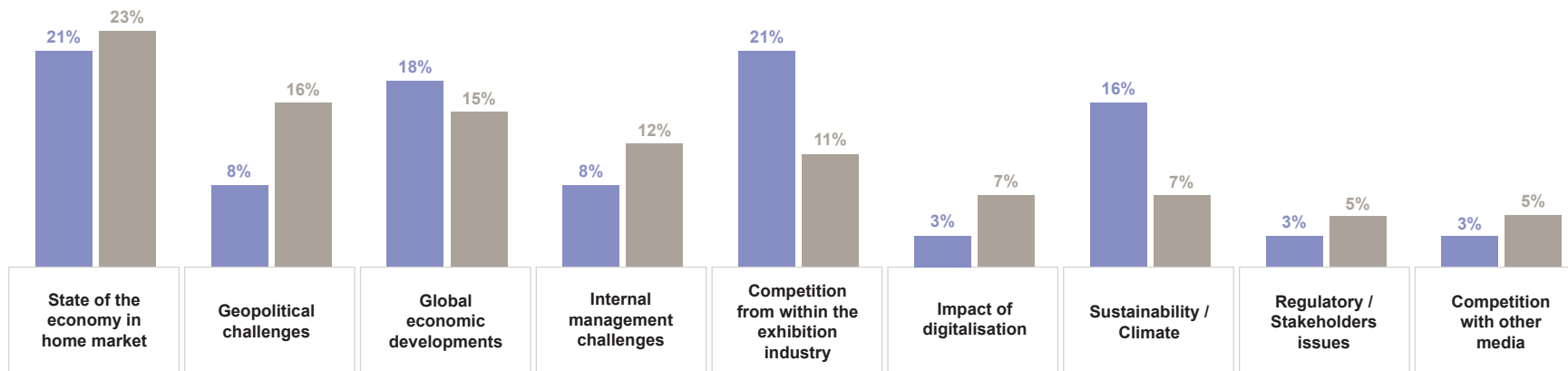




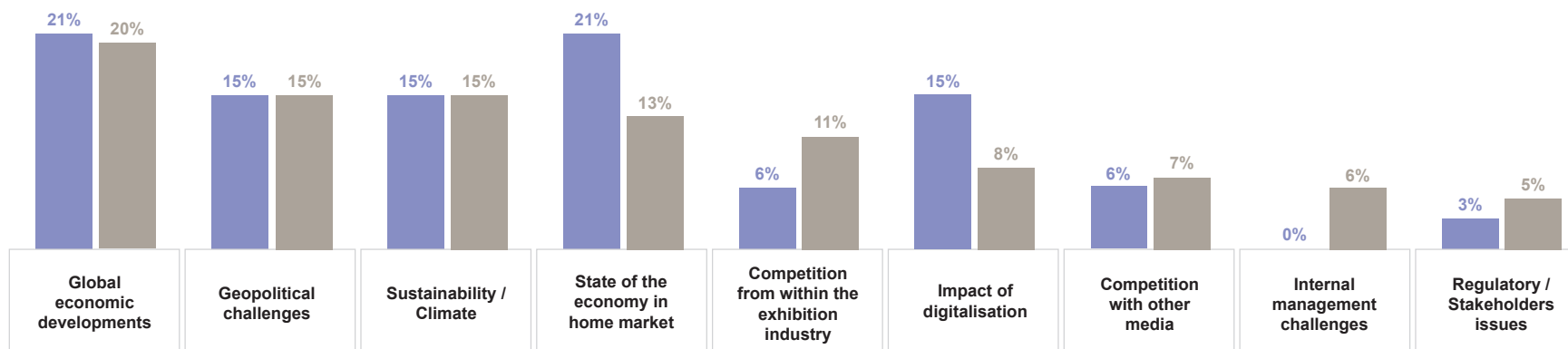
Most important business issues in the exhibition industry right now

Short term (12-18 months)

UK Global

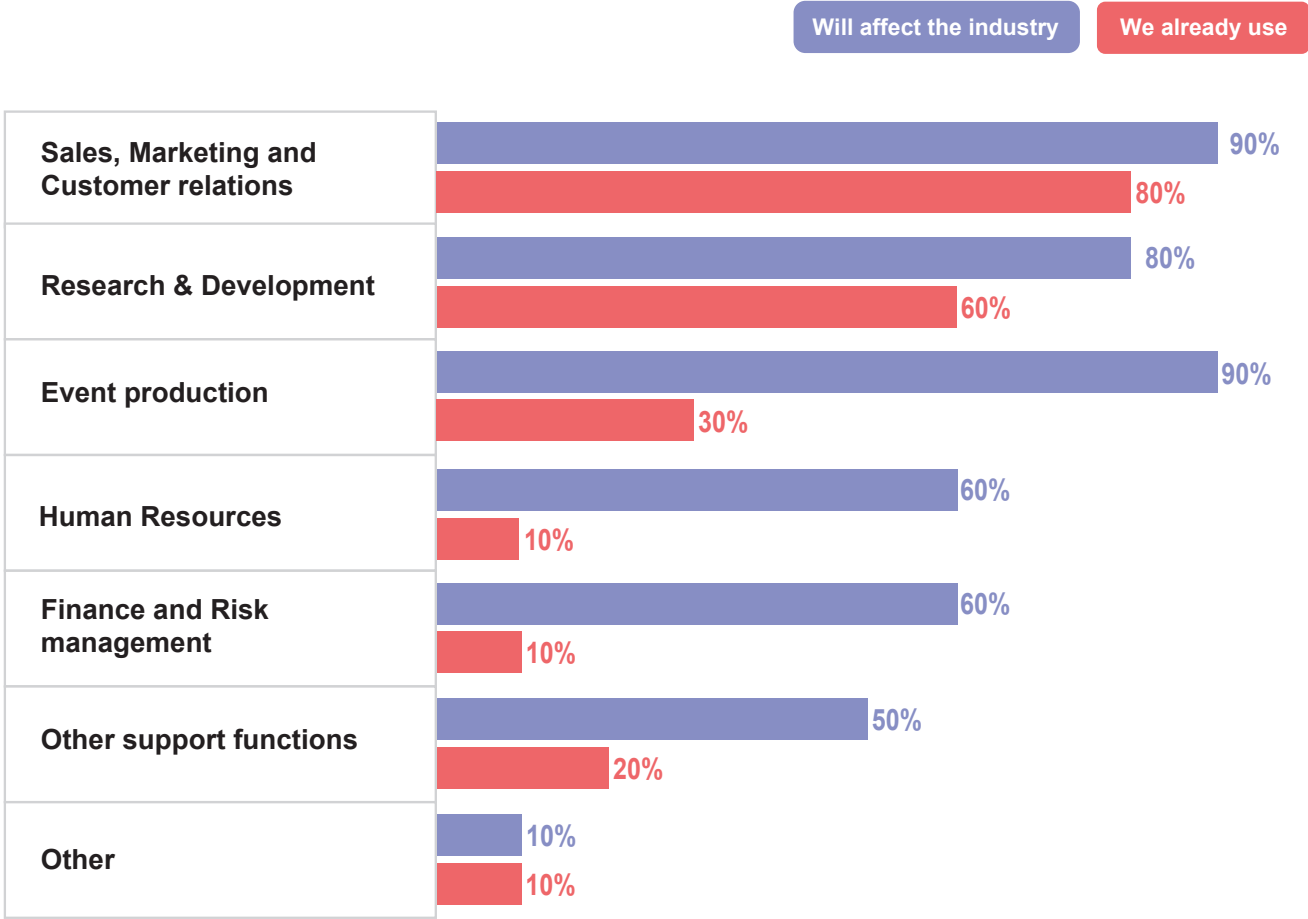


Mid-term (3-5 years)





Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



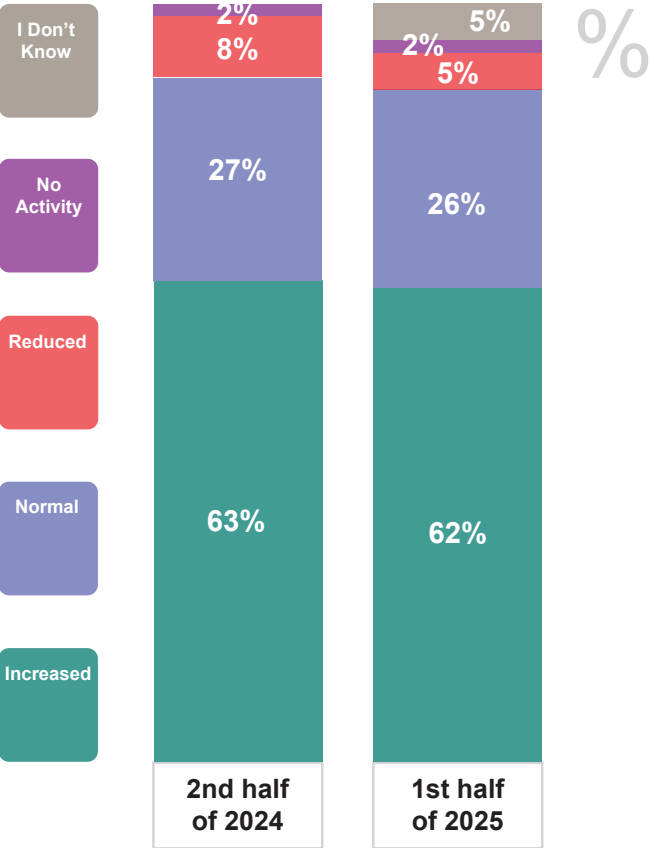
Middle East & Africa



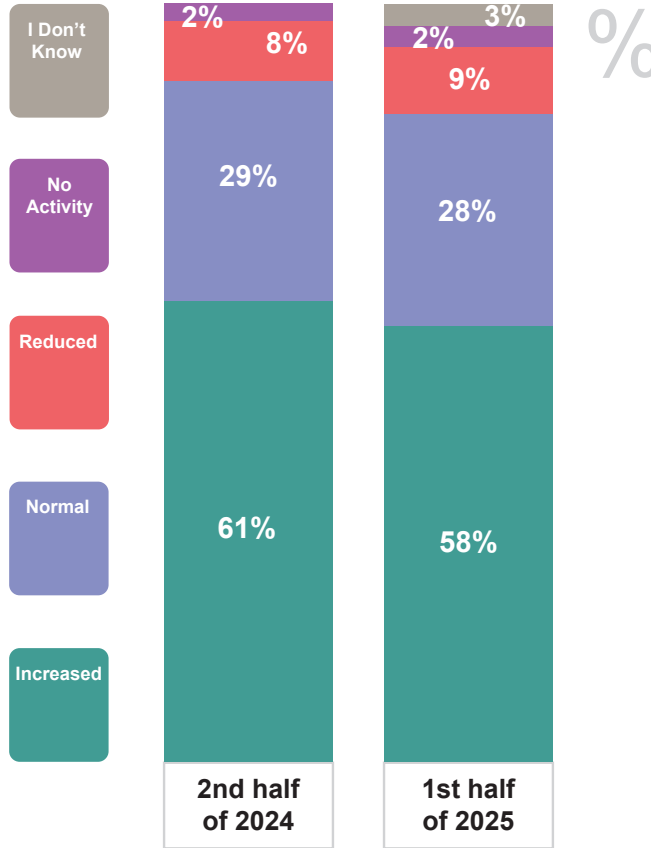


Situation of the industry operations for the current year, and predictions for the next year

Middle East & Africa



World



Space Sold Middle East & Africa



Exhibition space sold in 2024 compared to 2019

Middle East & Africa

2019 Space sold indexed as 100



World

2019 Space sold indexed as 100

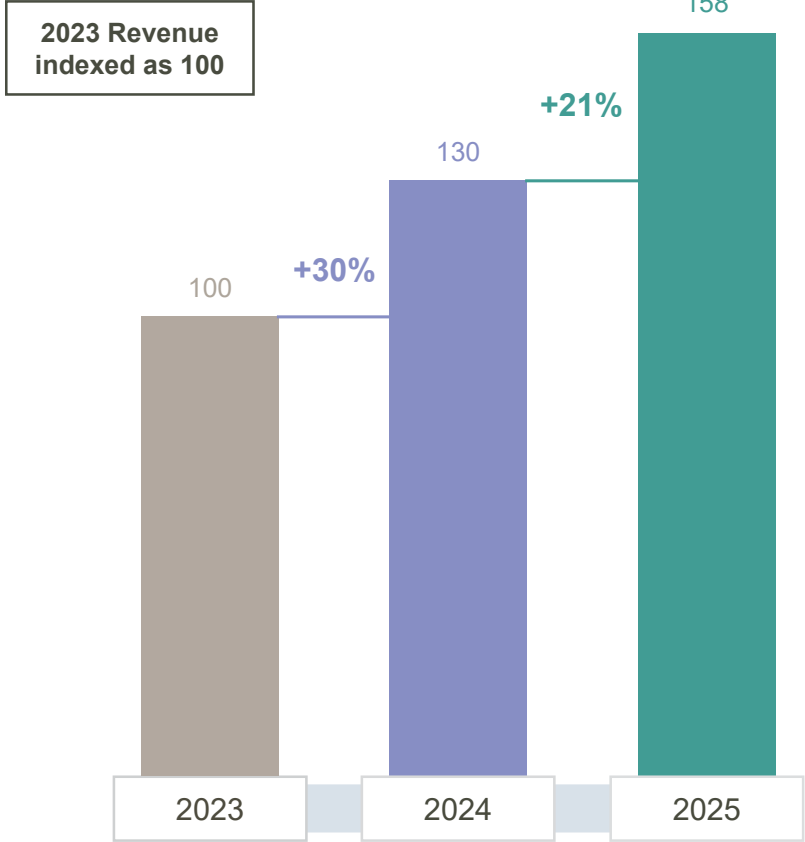


Turnover Middle East & Africa

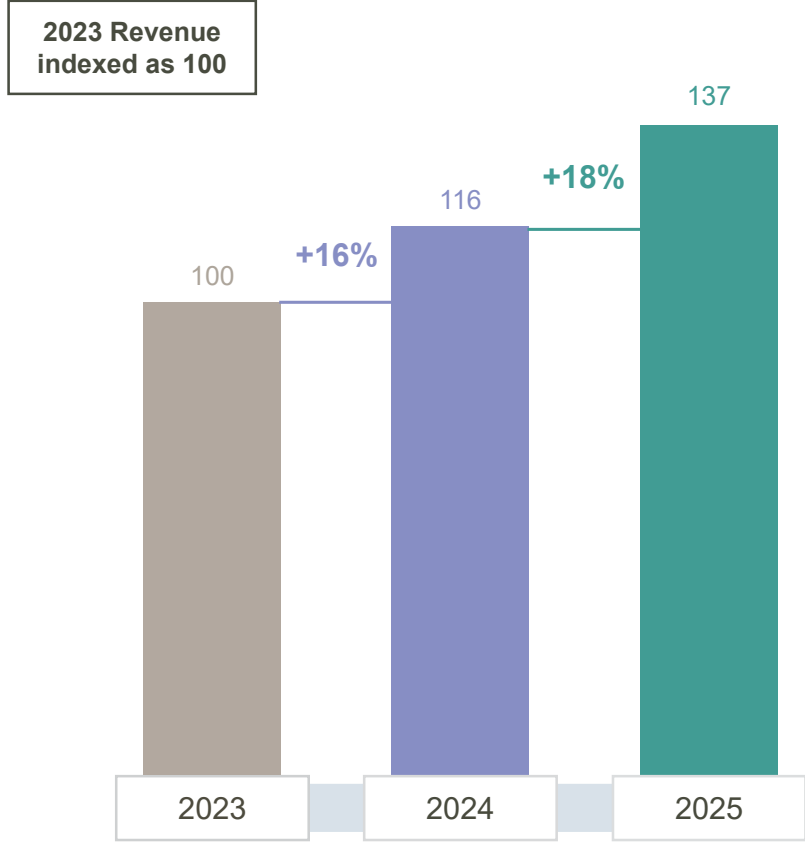


Revenue compared to previous year

Middle East & Africa



World

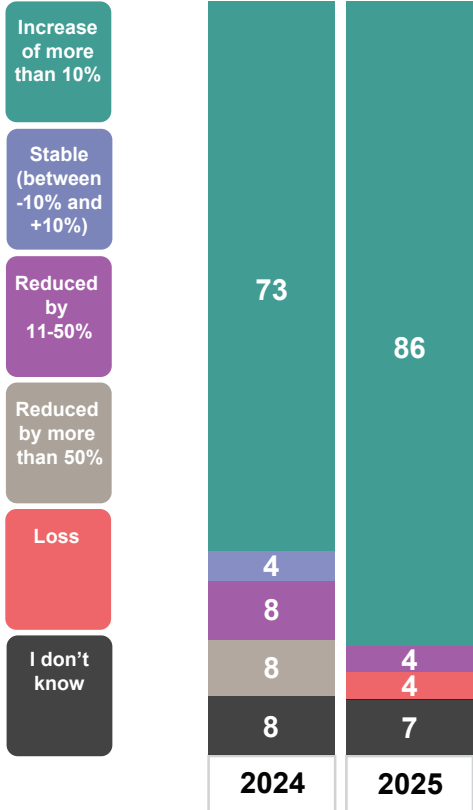


Operating Profits Middle East & Africa

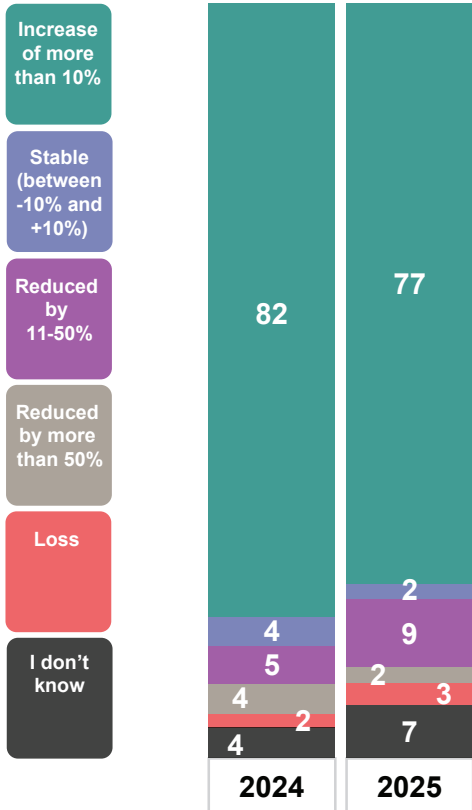


Operating profits compared to previous year

Middle East & Africa



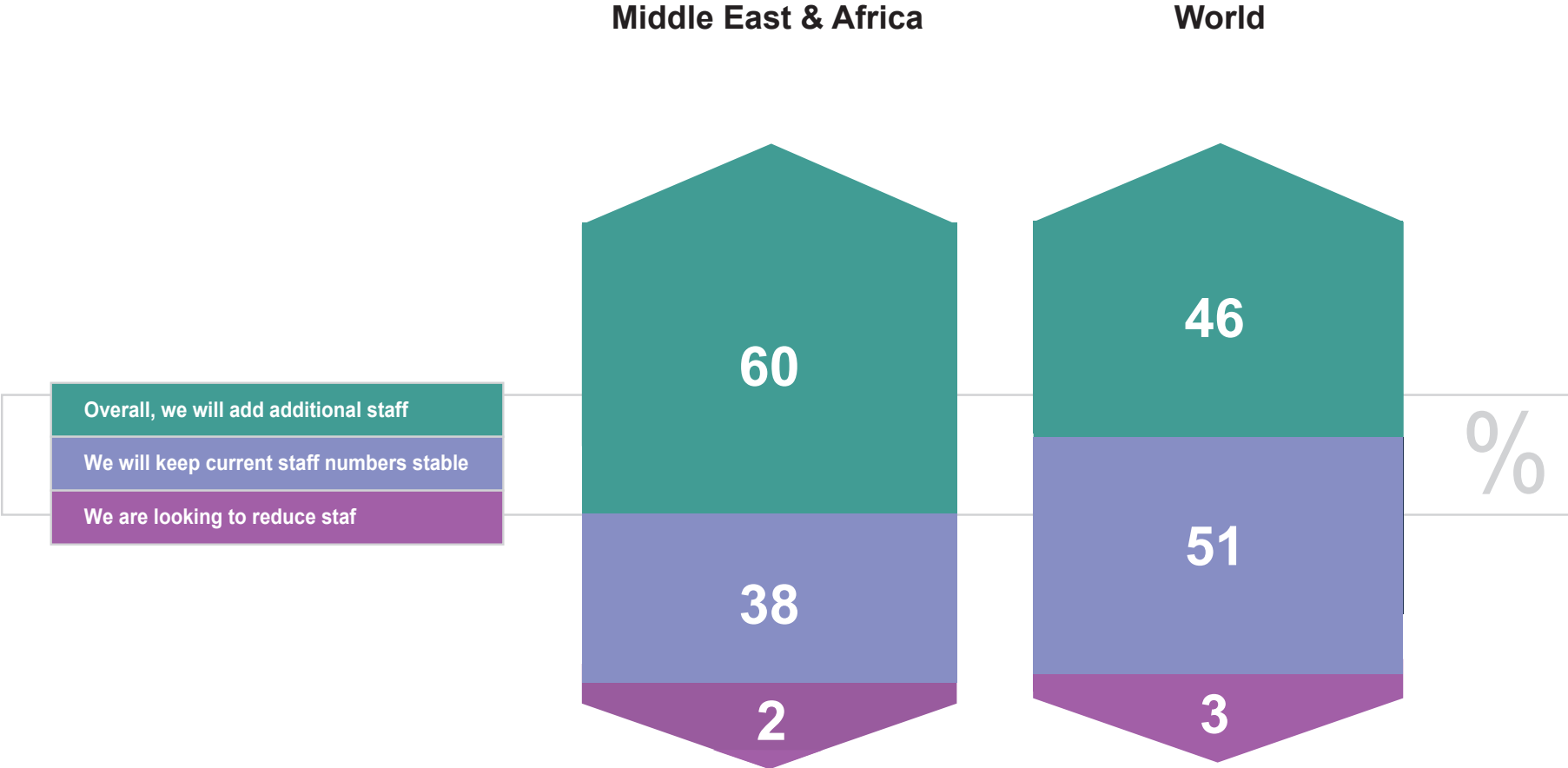
World



%



How do you plan to develop your workforce in the coming 6 months



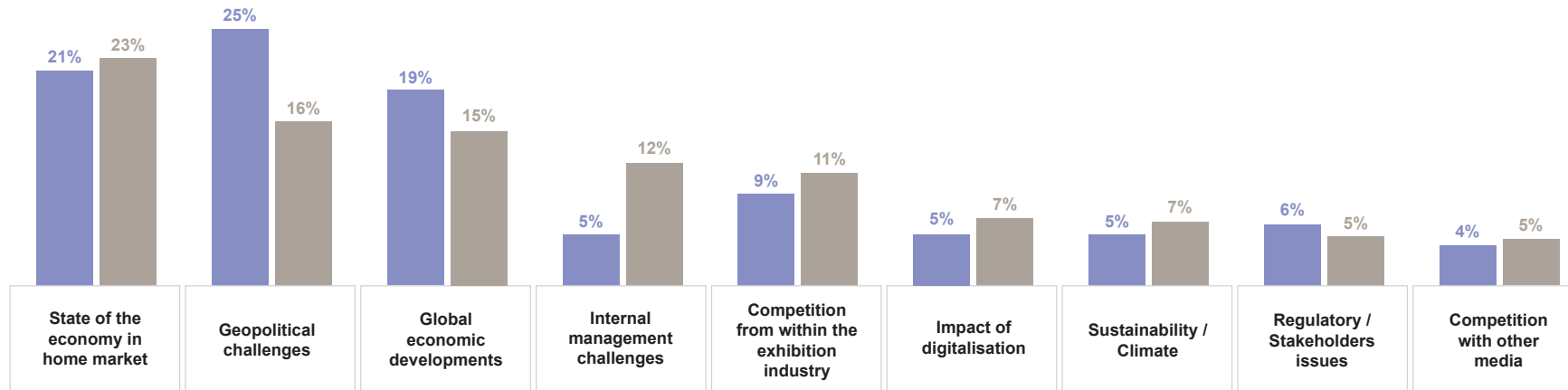
Most Important Business Issues - Key Factors for Business Development - Middle East & Africa



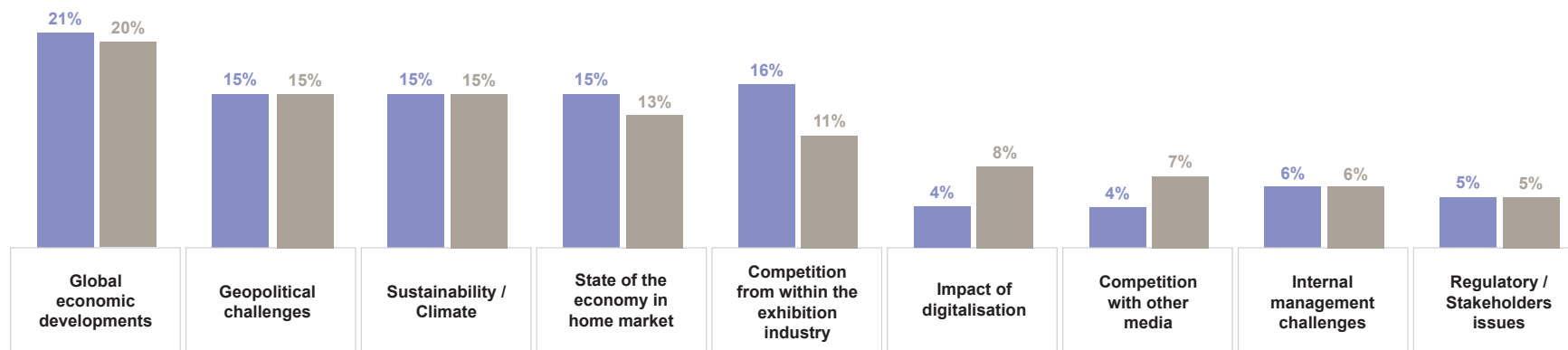
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Middle East & Africa Global



Mid-term (3-5 years)



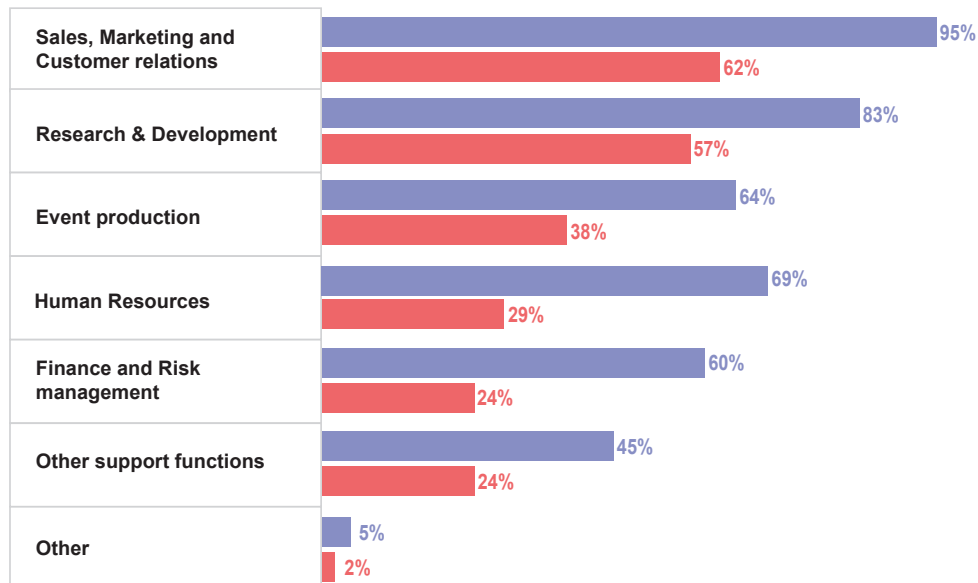


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

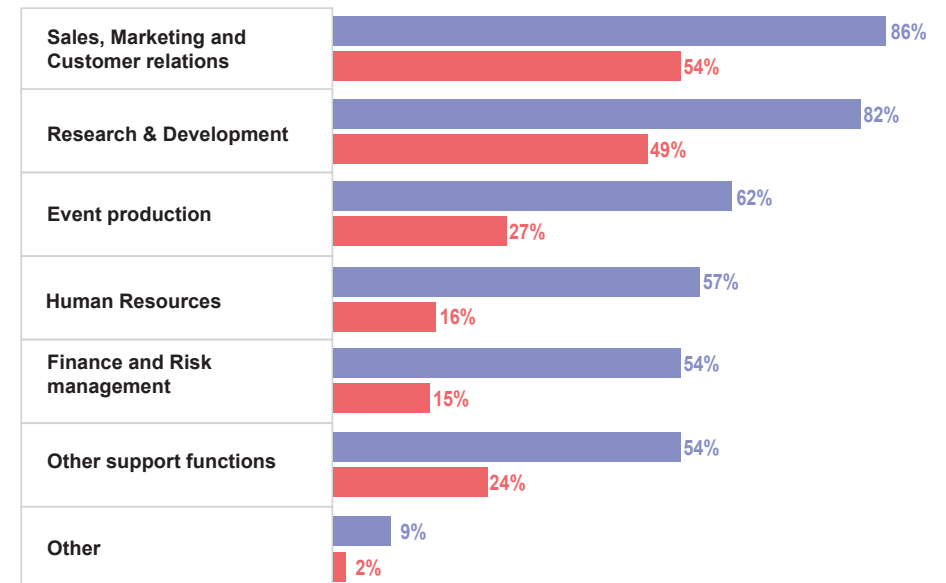
Will affect the industry

We already use

Middle East & Africa

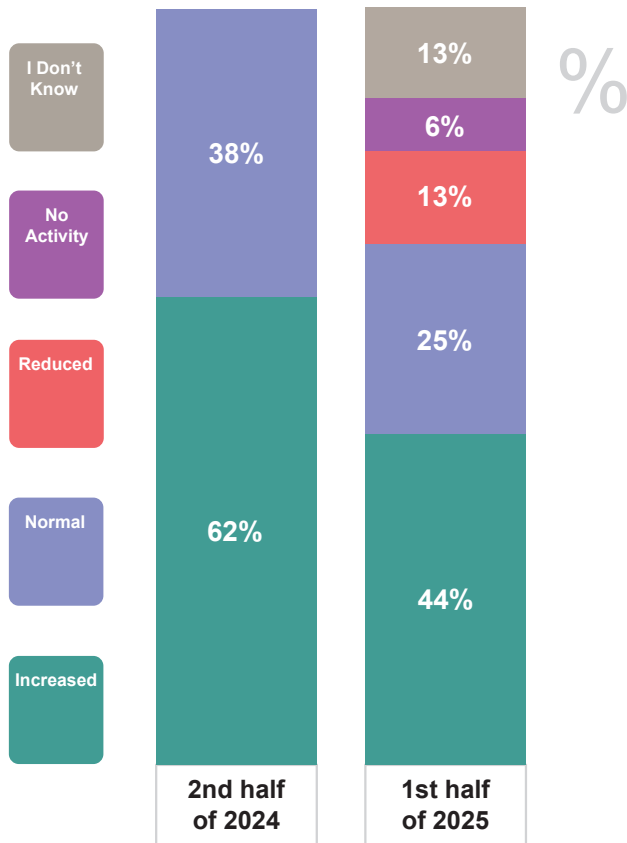


World

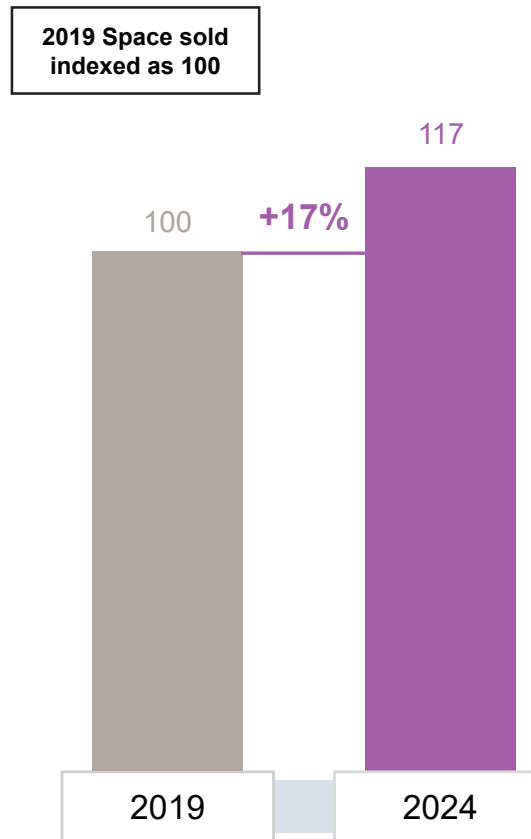




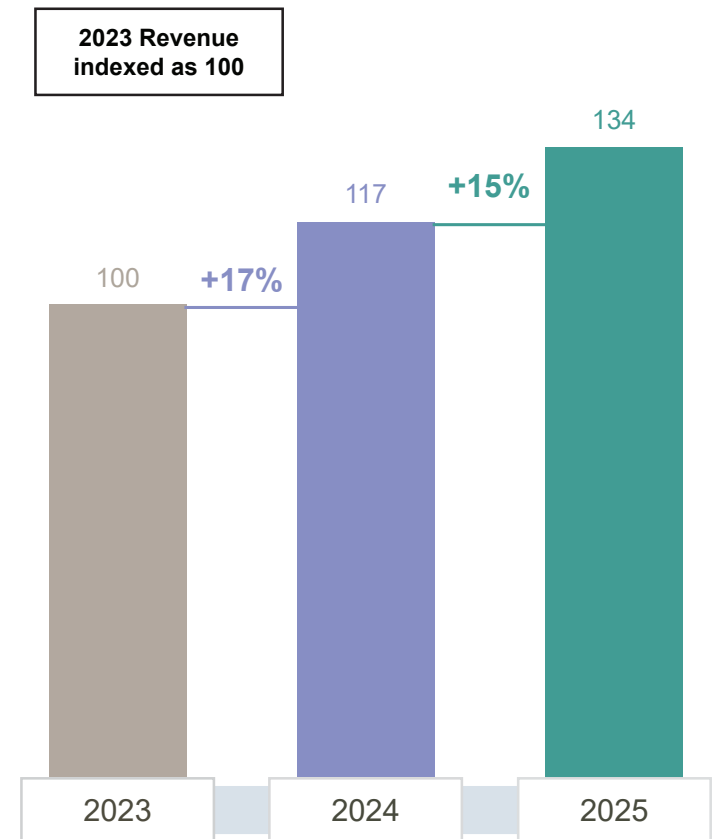
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

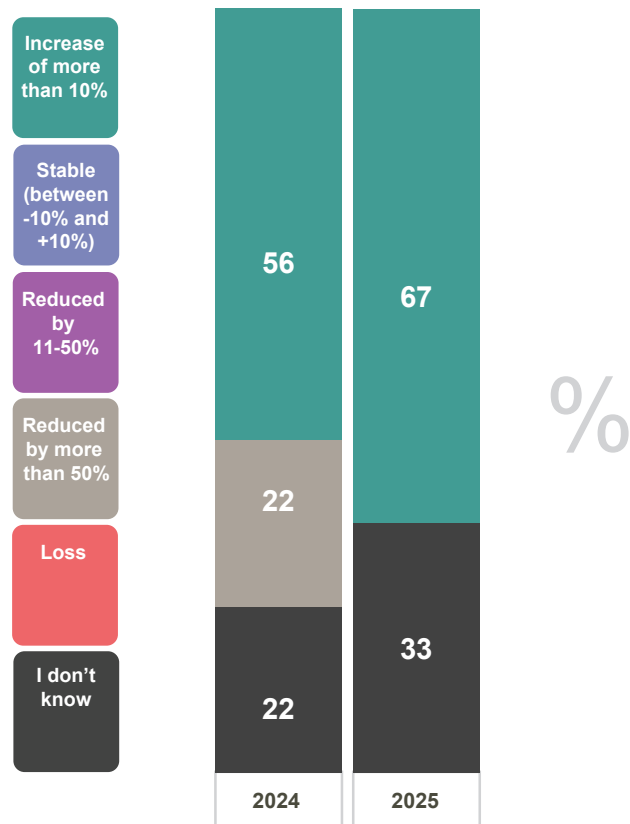


Revenue compared to previous year

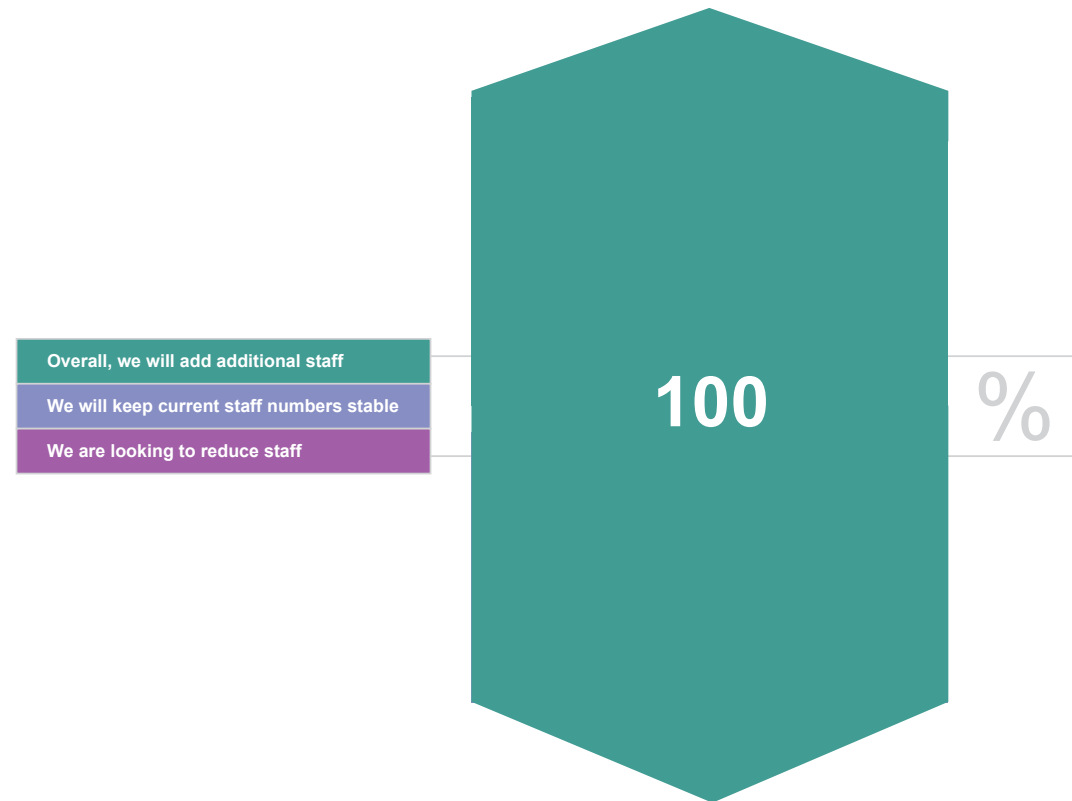




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months



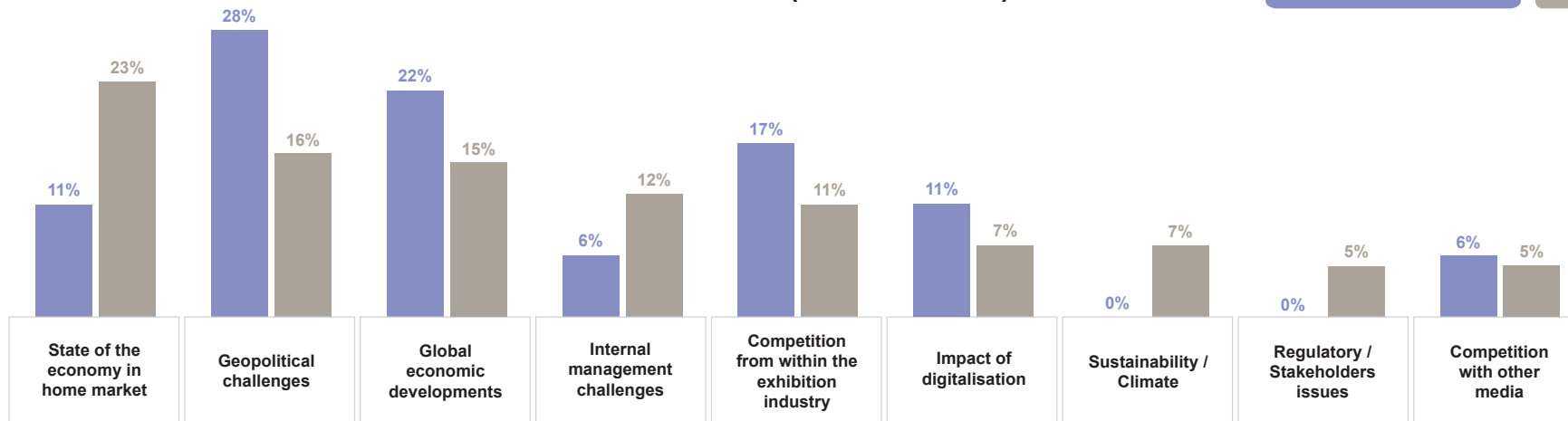


Most important business issues in the exhibition industry right now

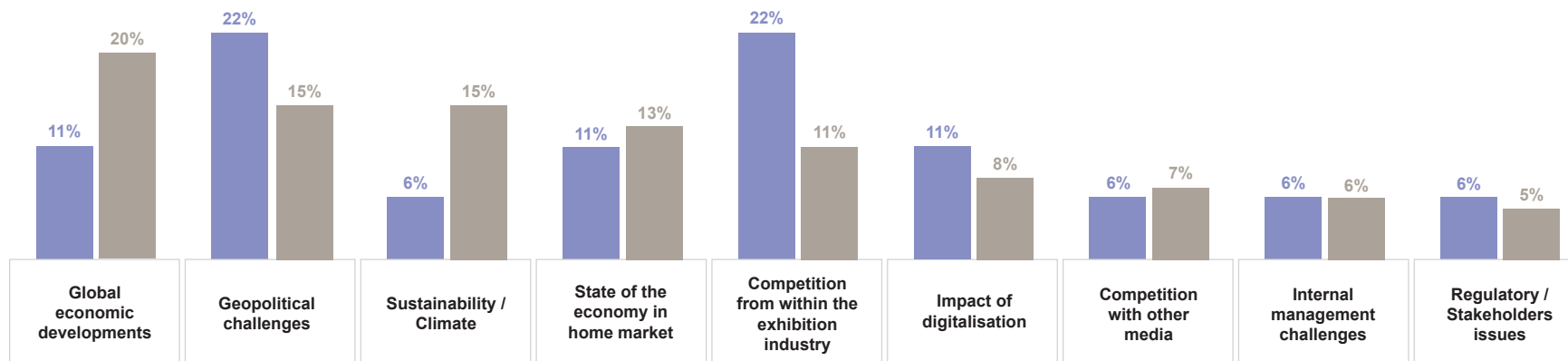
Short term (12-18 months)

Saudi Arabia

Global

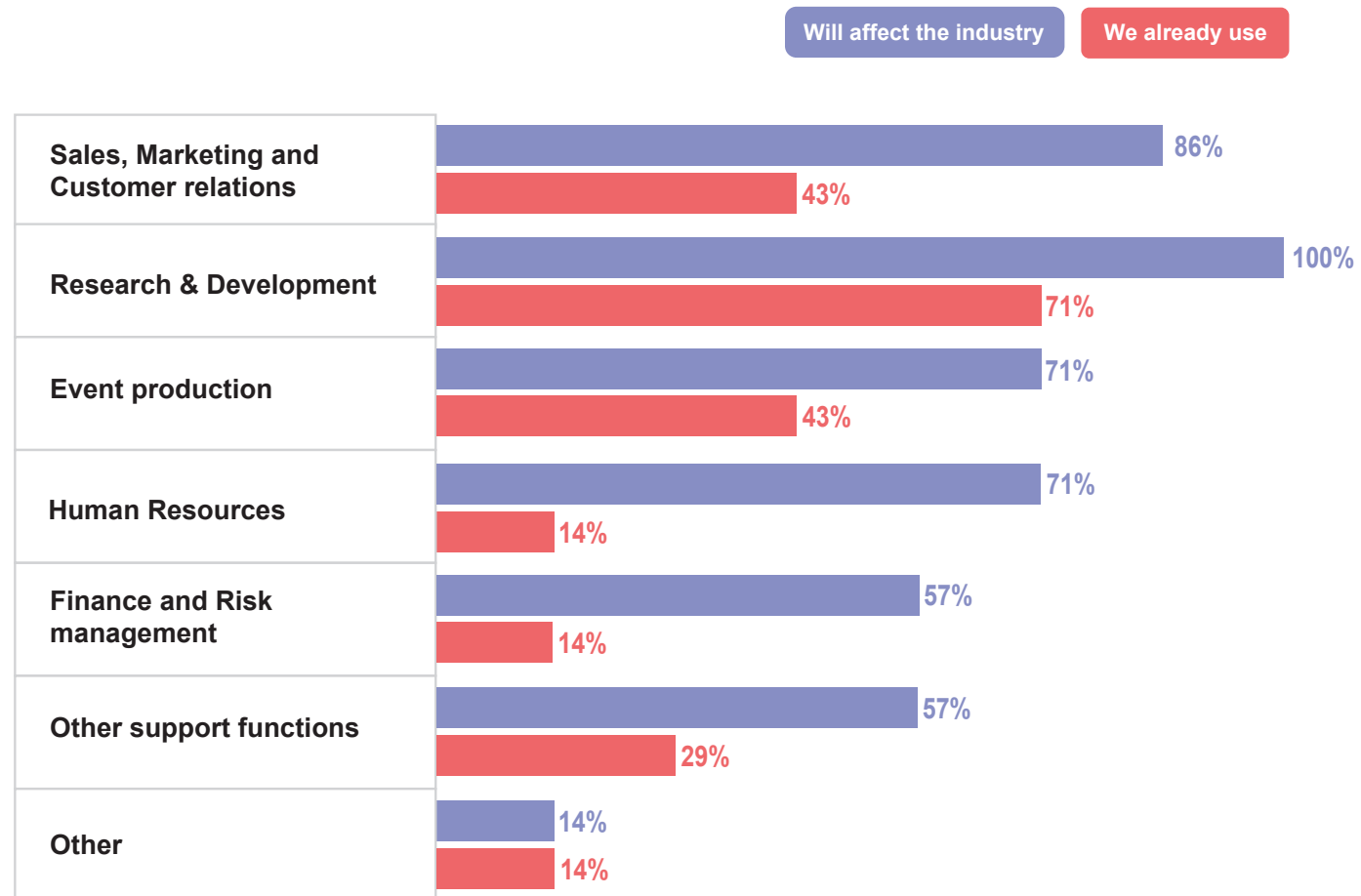


Mid-term (3-5 years)





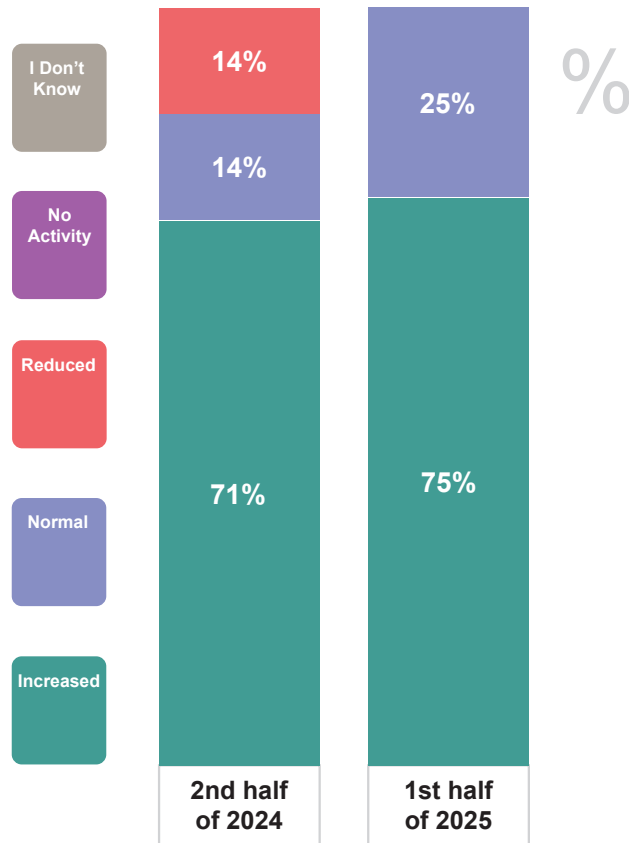
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



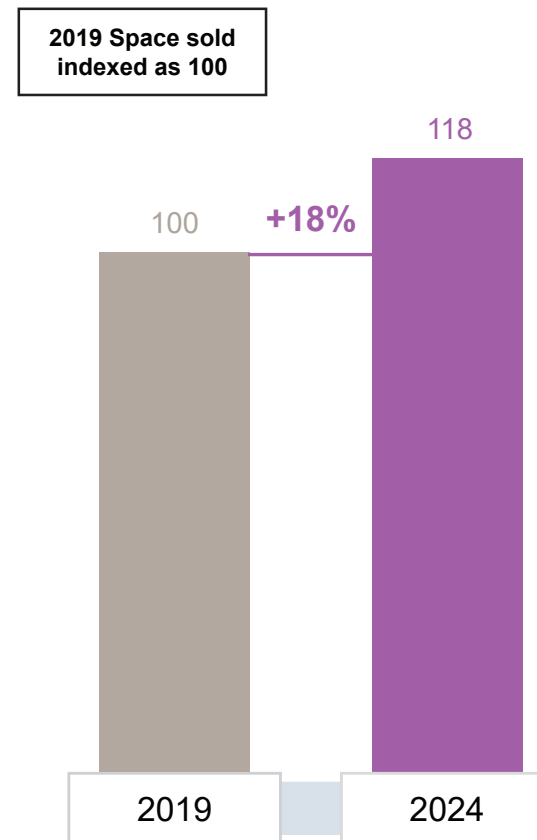
Detailed results for United Arab Emirates



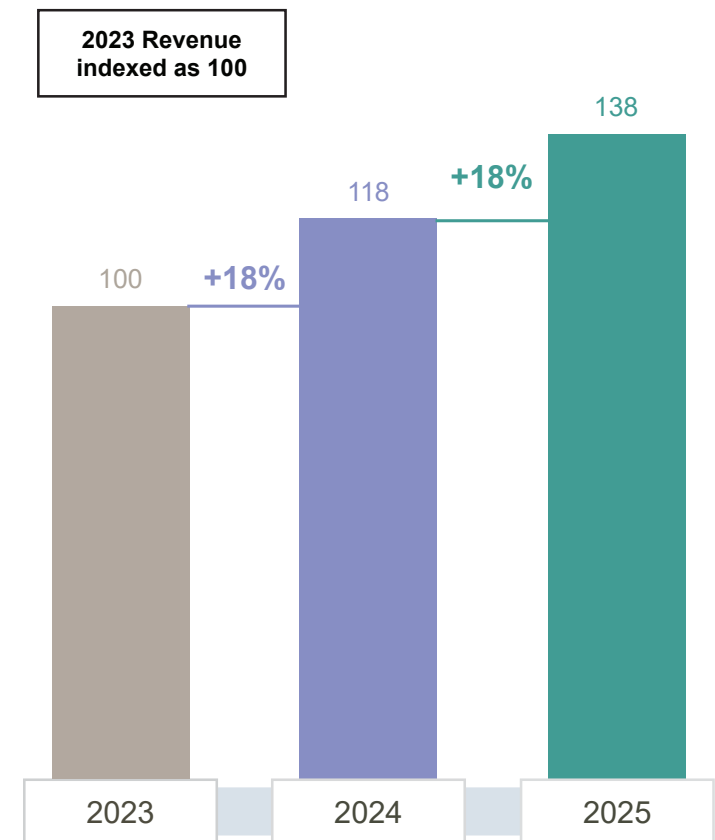
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



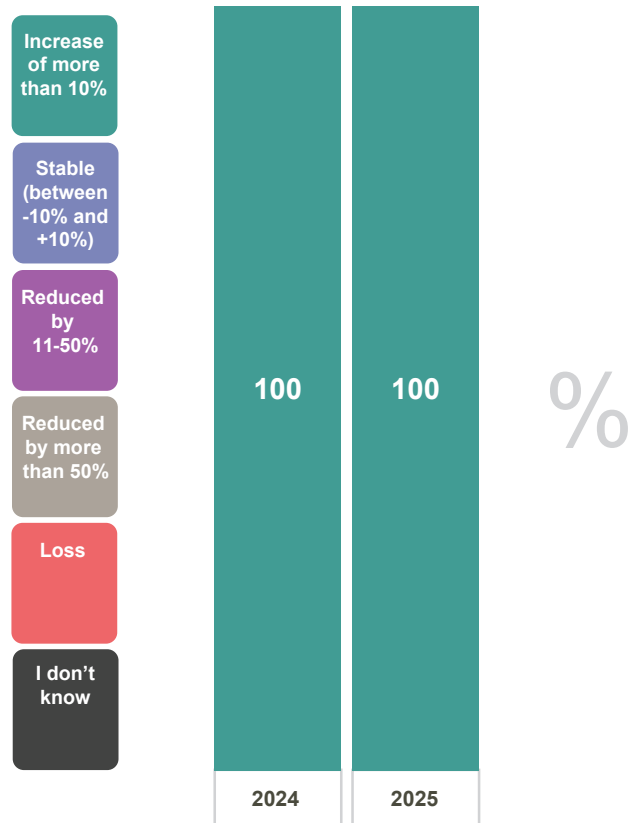
Revenue compared to previous year



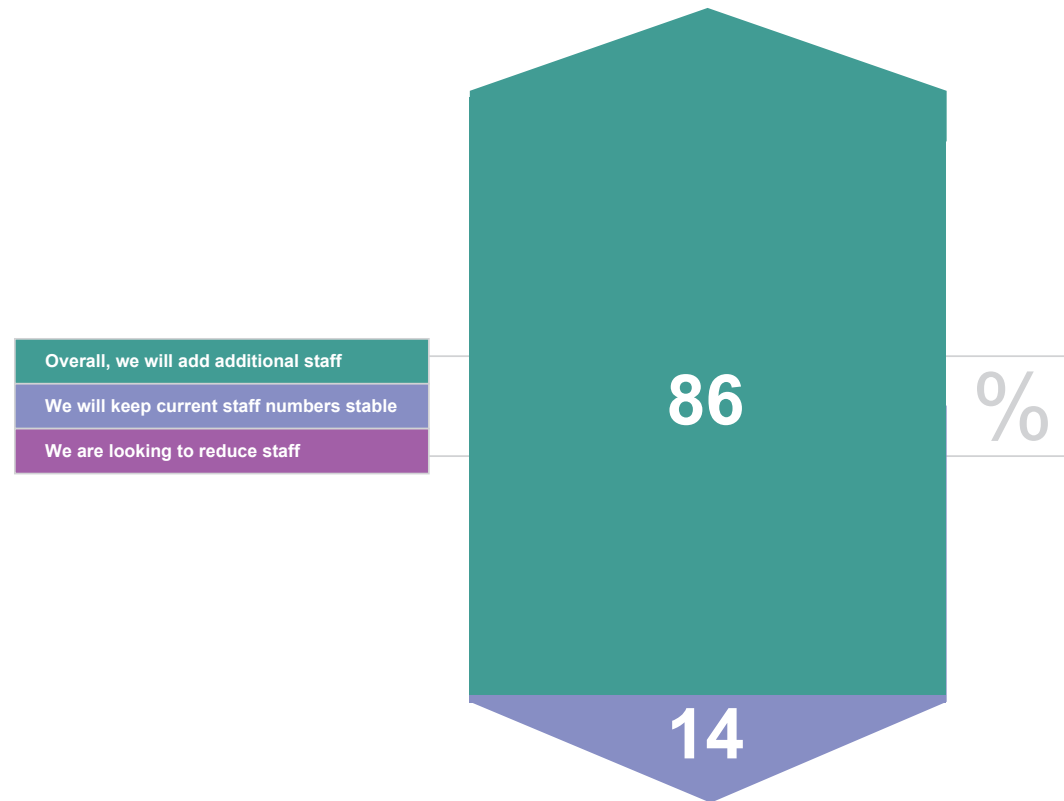
Detailed results for United Arab Emirates



Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months

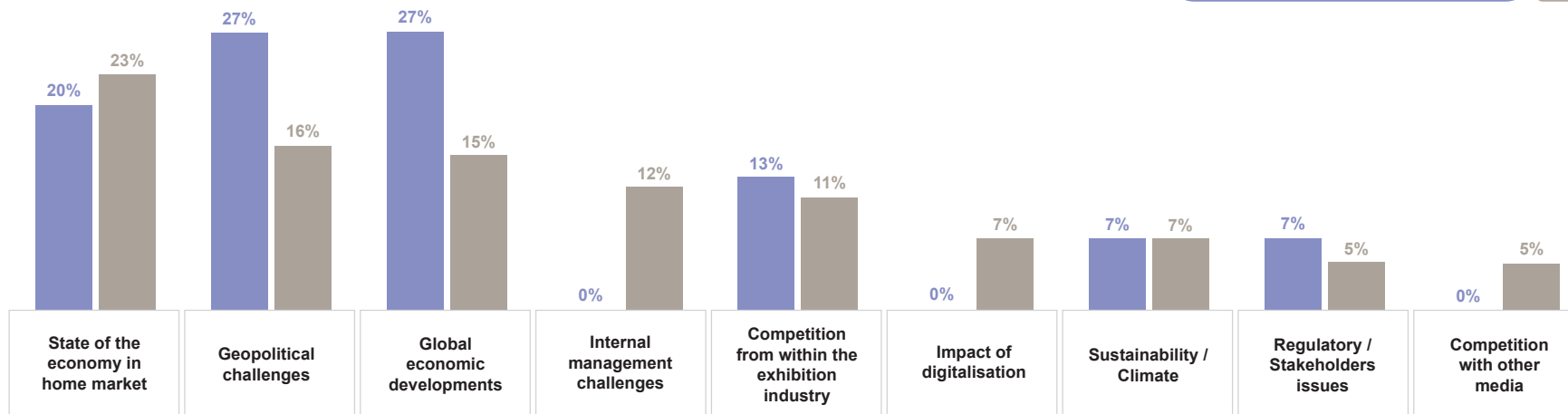




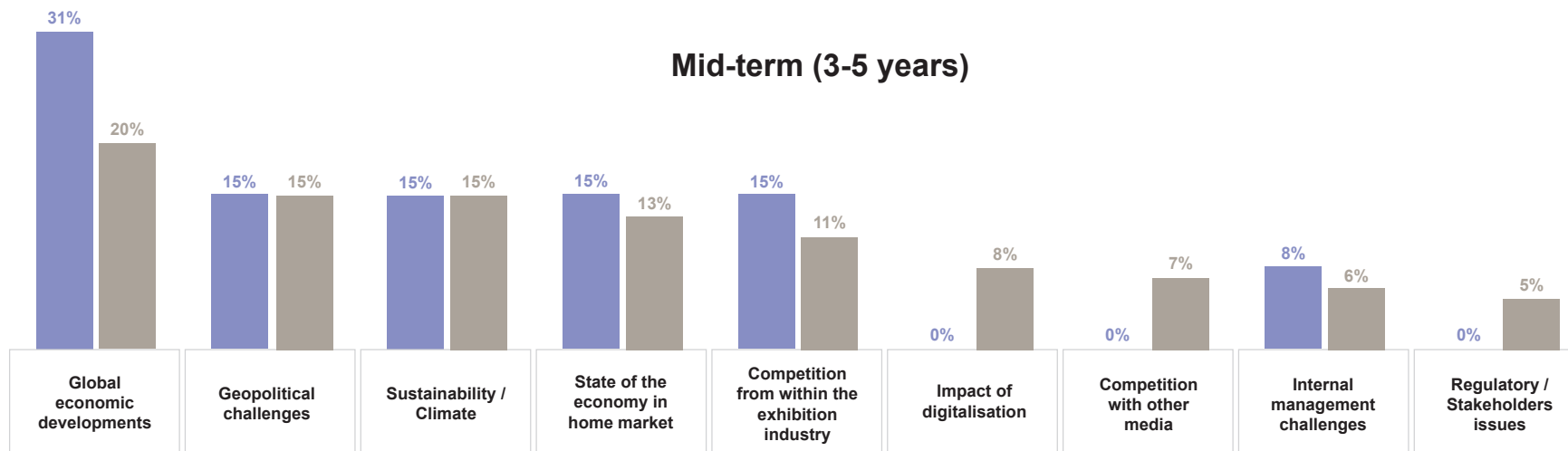
Most important business issues in the exhibition industry right now

Short term (12-18 months)

United Arab Emirates Global

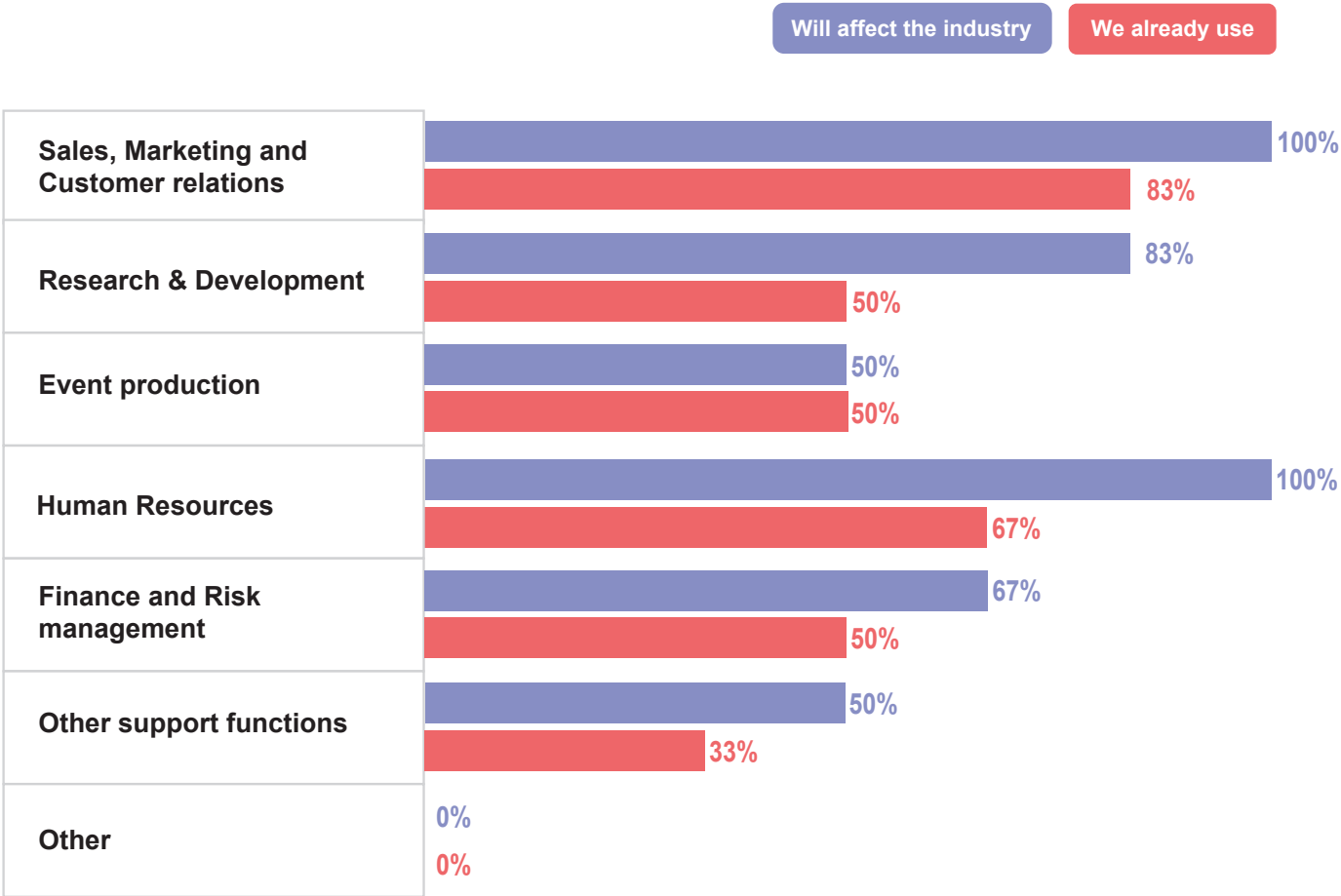


Mid-term (3-5 years)





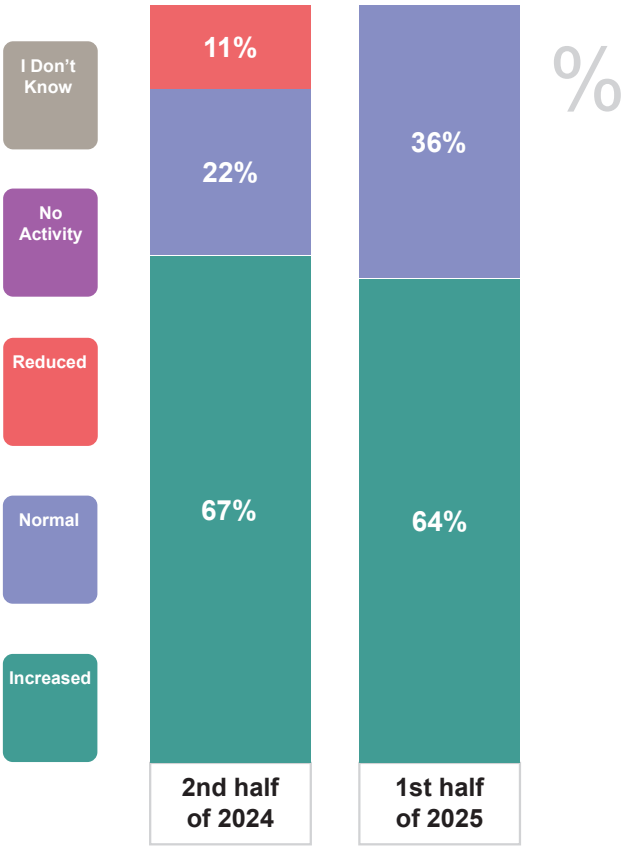
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



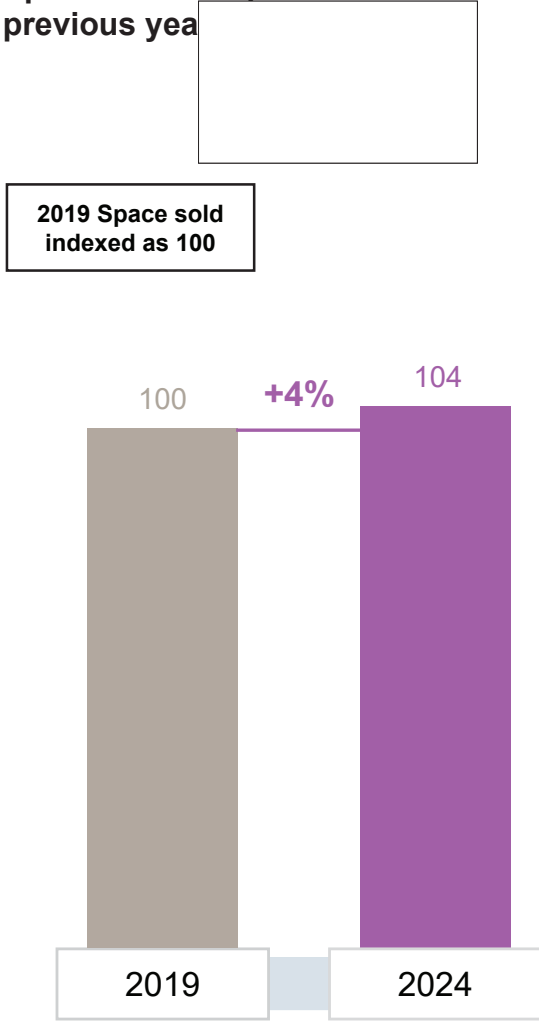
Detailed results for South Africa



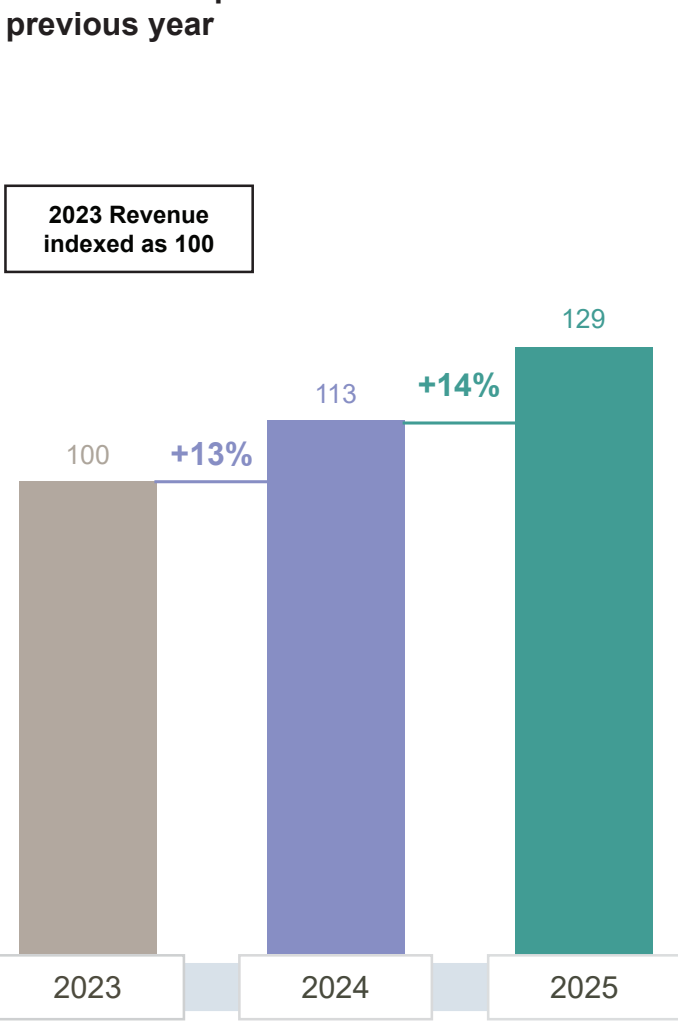
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

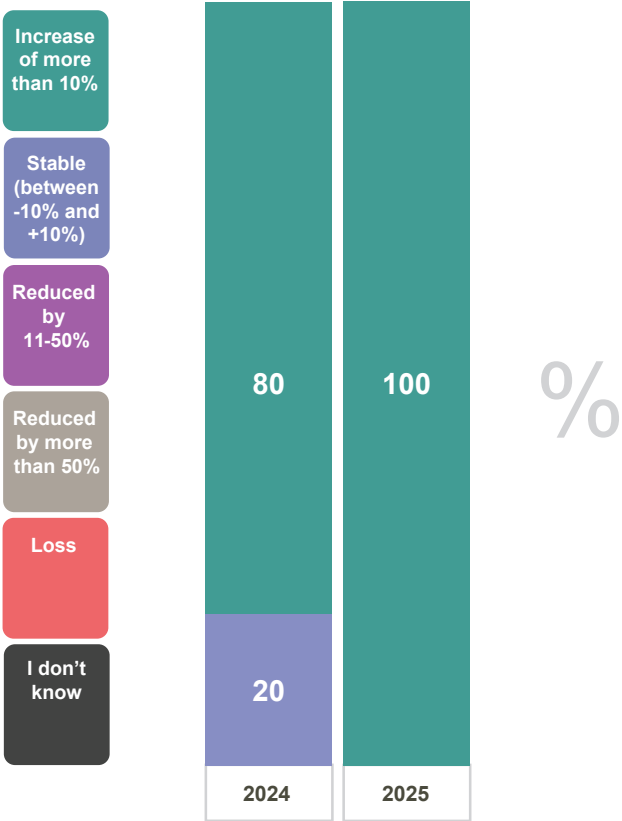


Revenue compared to previous year

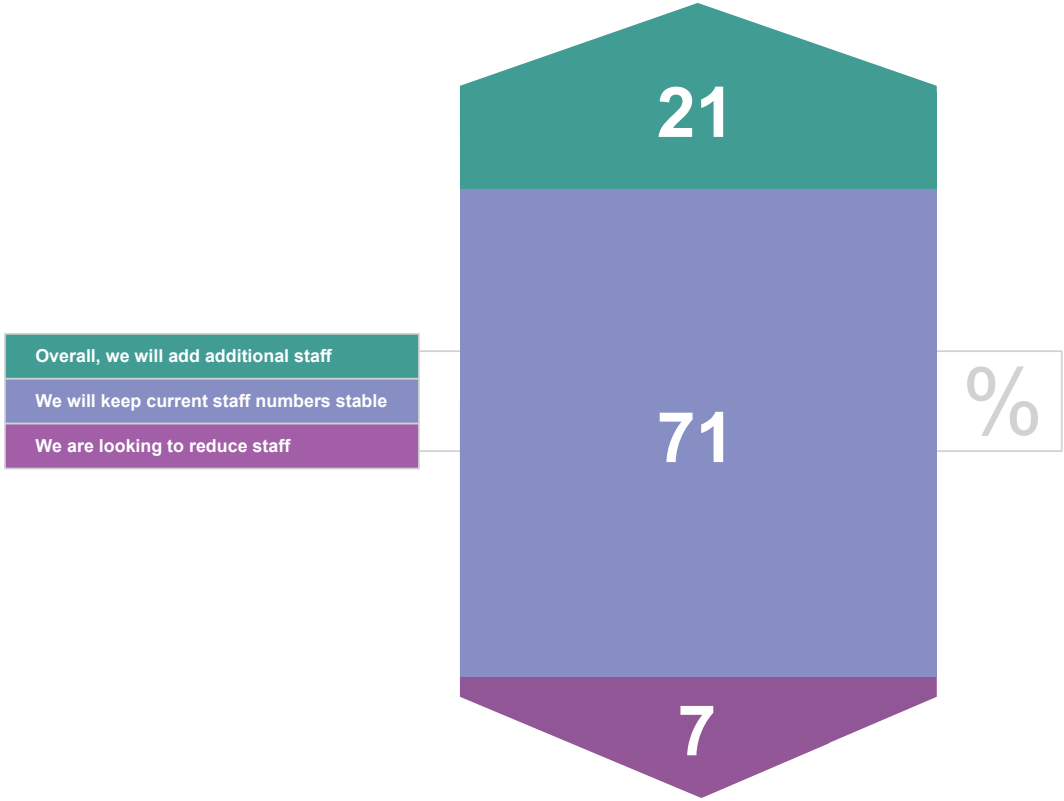




Operating profits compared to the previous year and others



How do you plan to develop your workforce in the coming 6 months



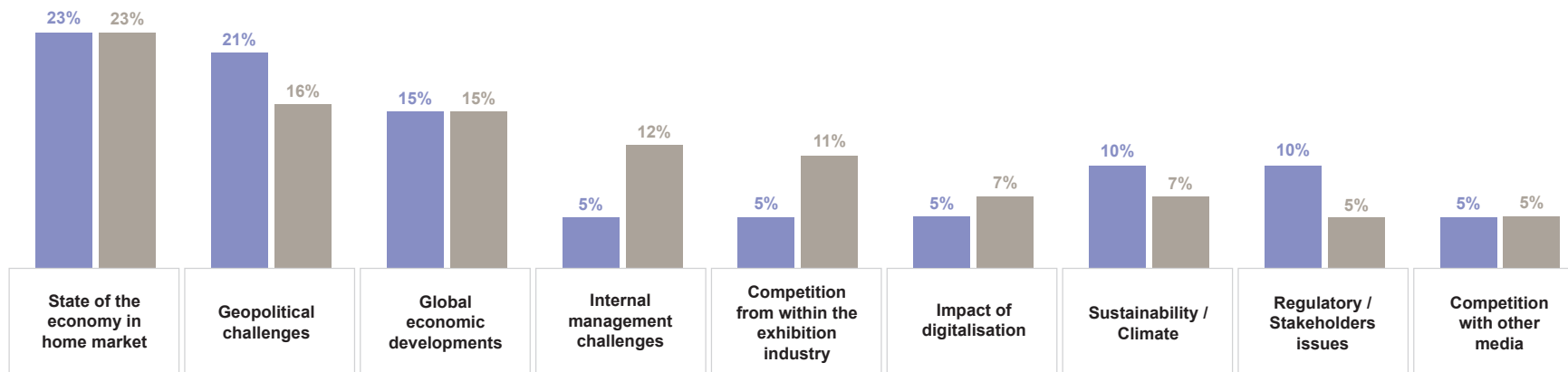


Most important business issues in the exhibition industry right now

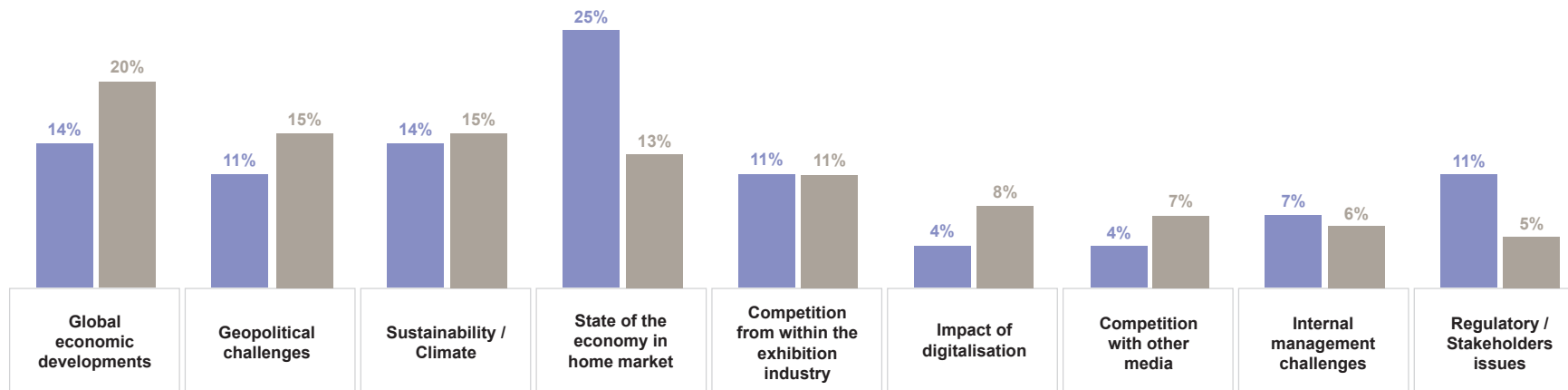
Short term (12-18 months)

South Africa

Global

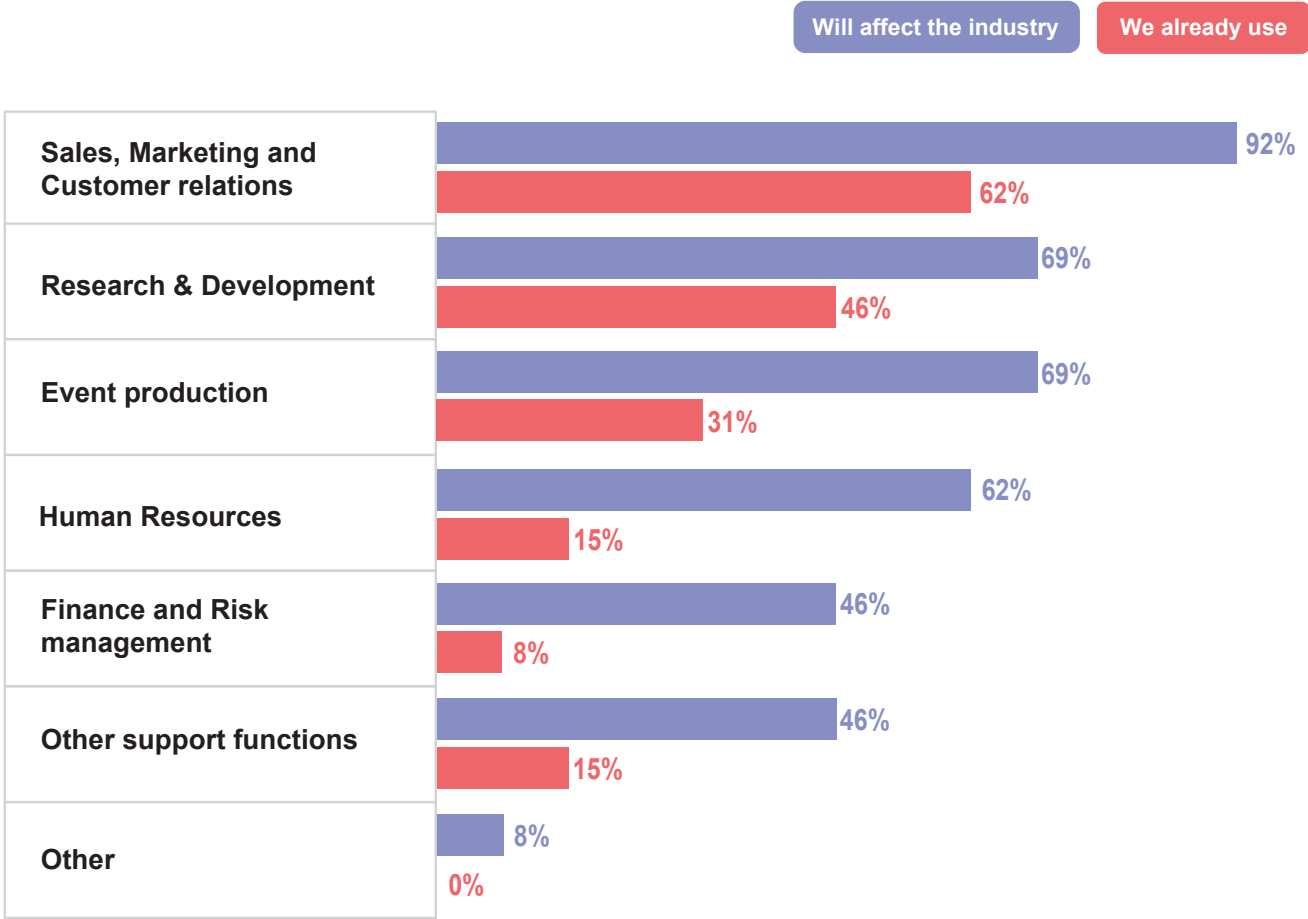


Mid-term (3-5 years)



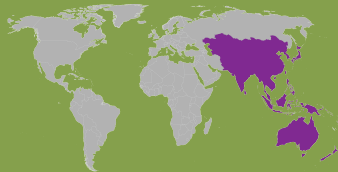


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



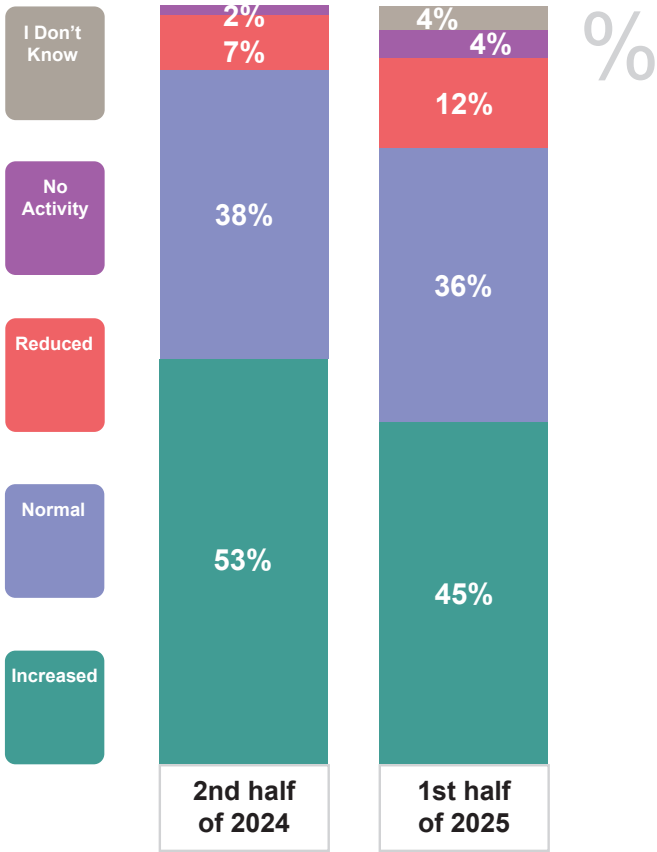
A network diagram consisting of several nodes connected by lines. The nodes are represented as spheres with a metallic, reflective surface. One node in the center is highlighted in a vibrant blue, while the others are a dark grey. The connections are thin, metallic lines. The entire scene is set against a solid, light purple background.

Asia-Pacific

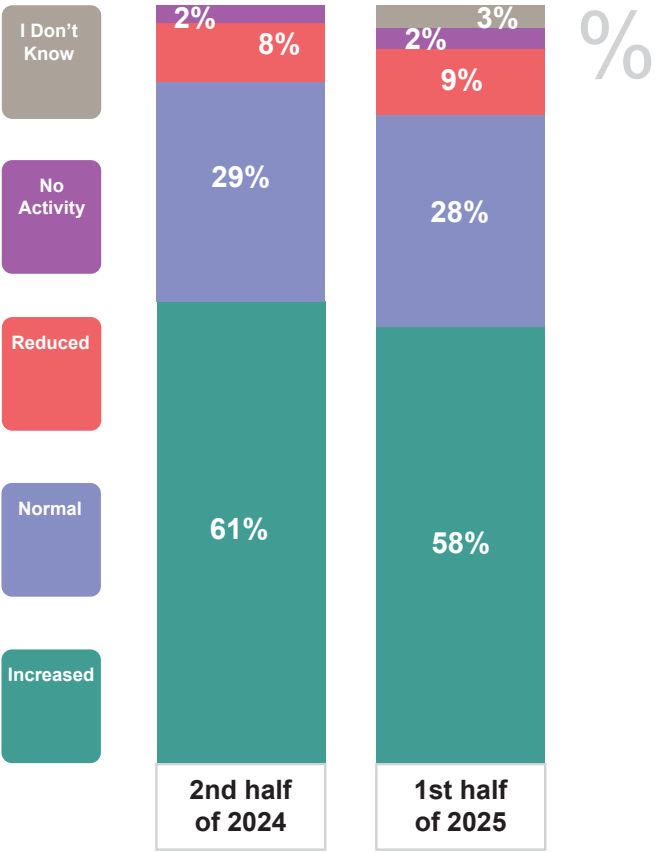


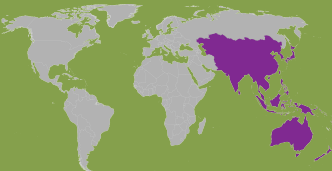
Situation of the industry operations for the current year, and predictions for the next year

Asia-Pacific



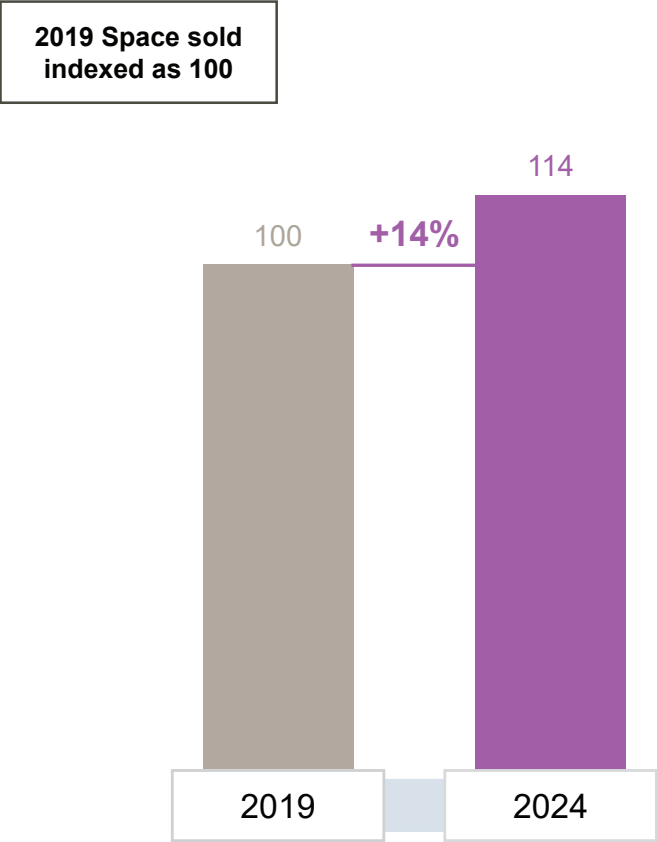
World



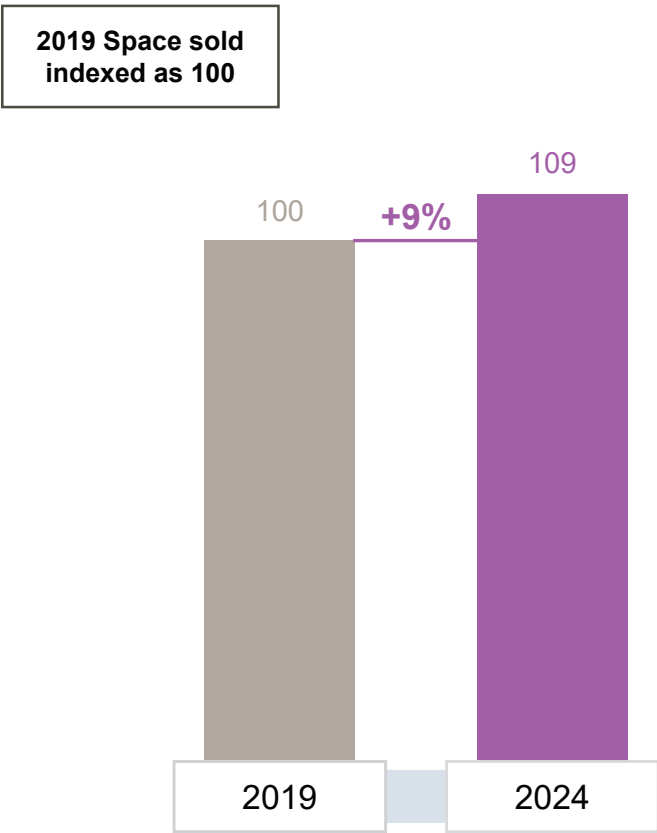


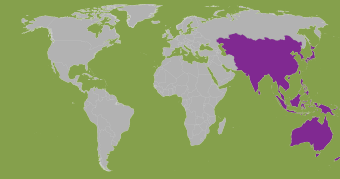
Exhibition space sold in 2024 compared to 2019

Asia-Pacific



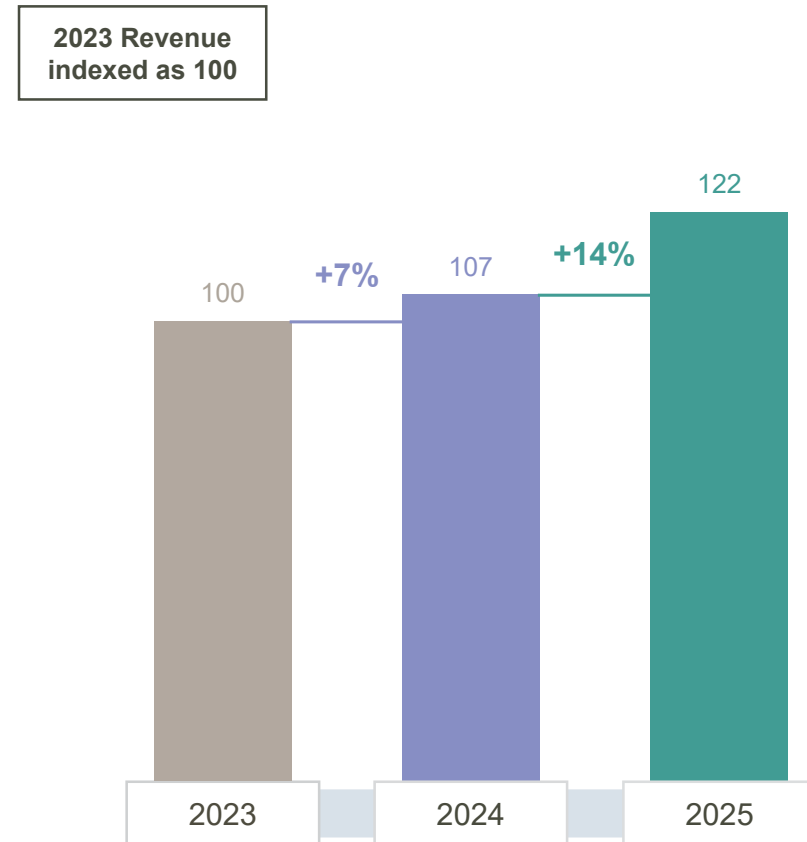
World



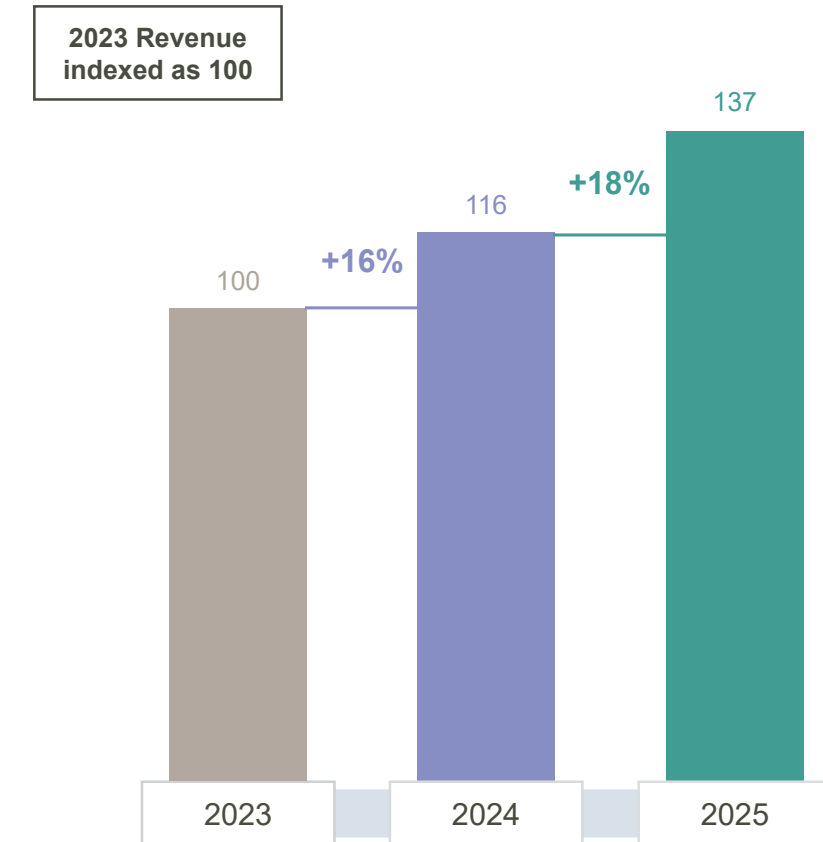


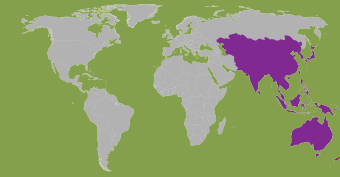
Revenue compared to previous year

Asia-Pacific



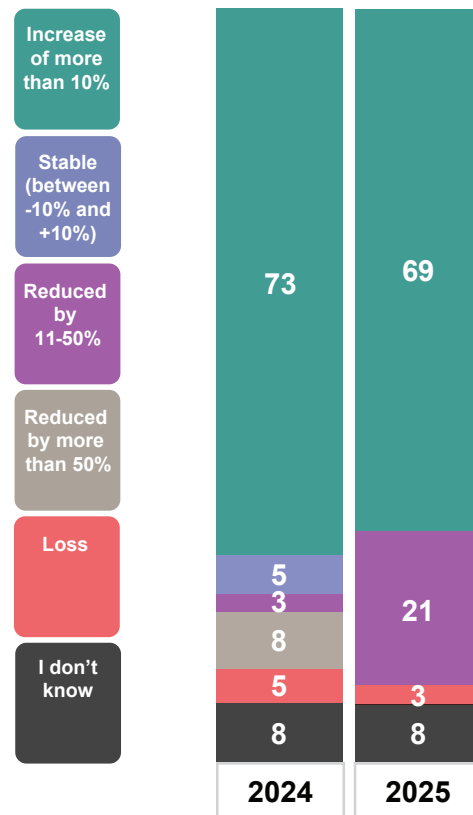
World



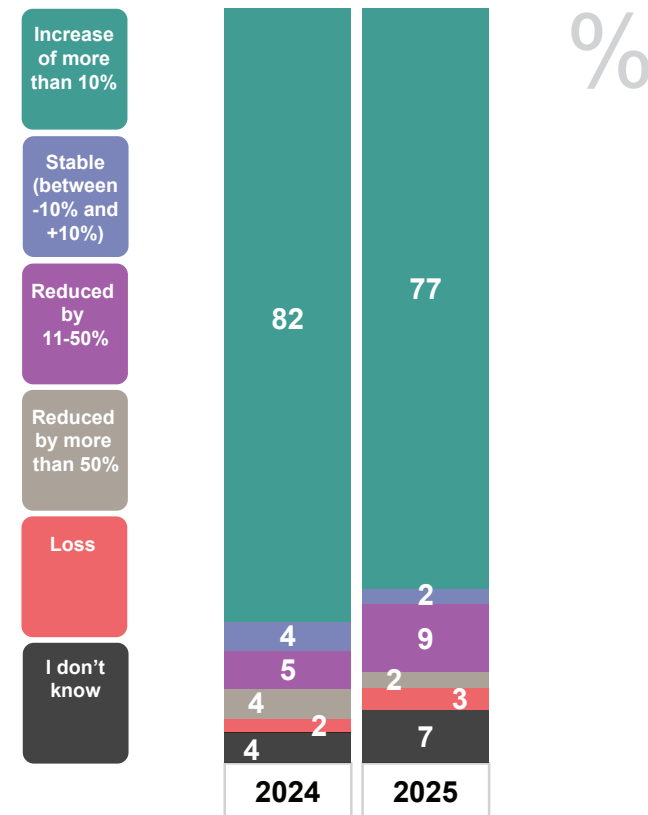


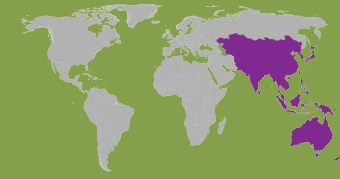
Operating profits compared to previous year

Asia-Pacific

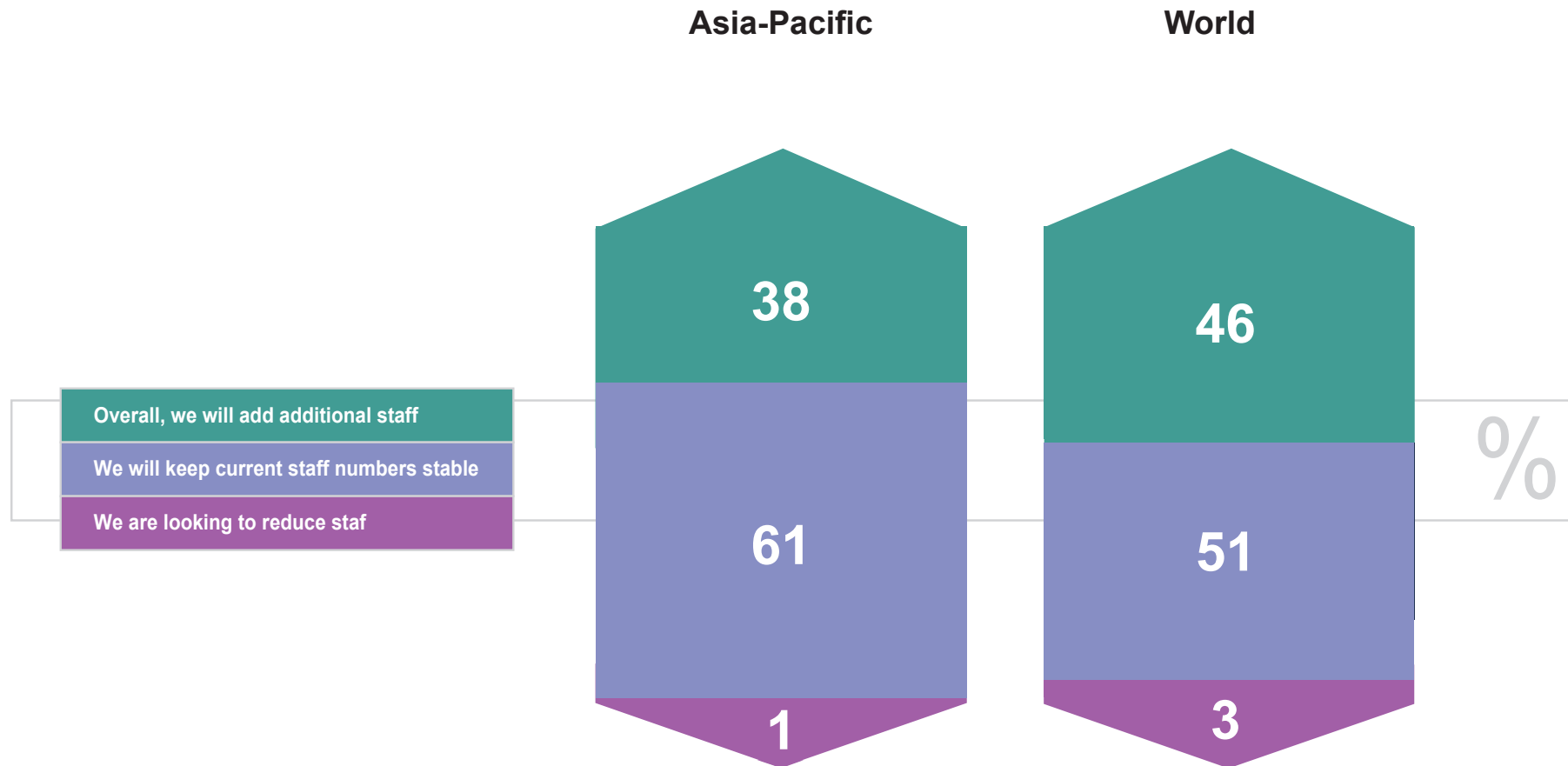


World

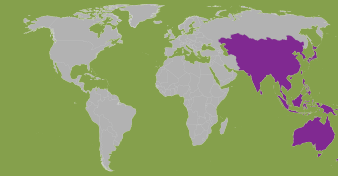




How do you plan to develop your workforce in the coming 6 months



Most Important Business Issues - Key Factors for Business Development - Asia-Pacific

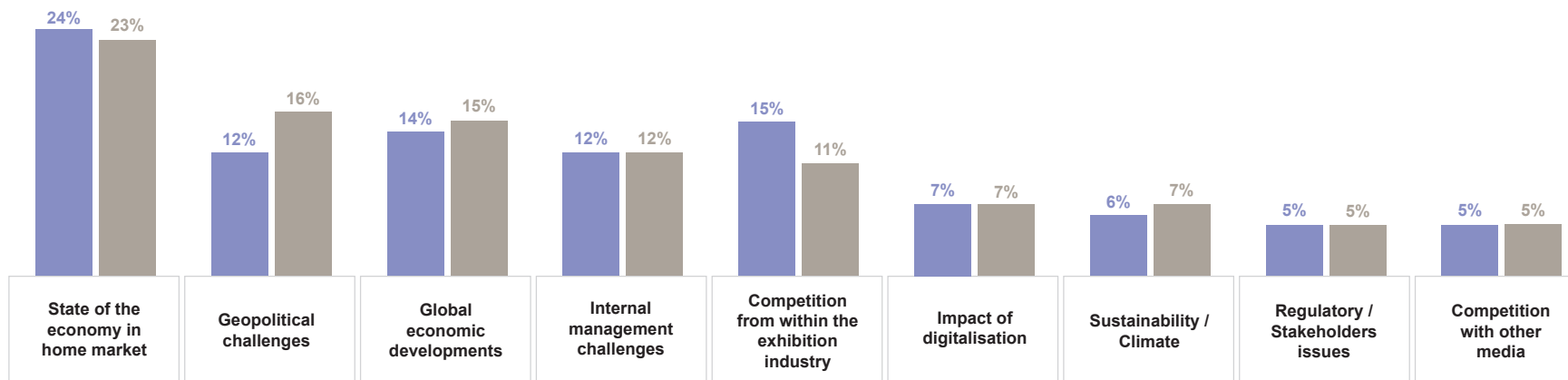


Most important business issues in the exhibition industry right now

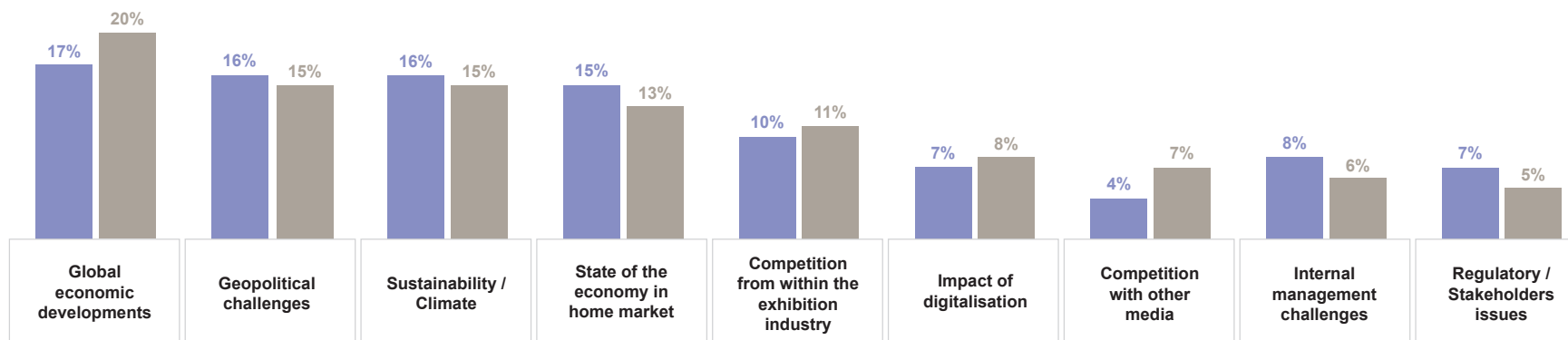
Short term (12-18 months)

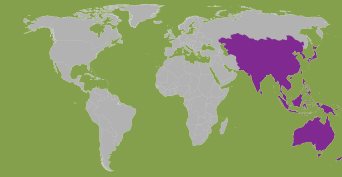
Asia/Pacific

Global



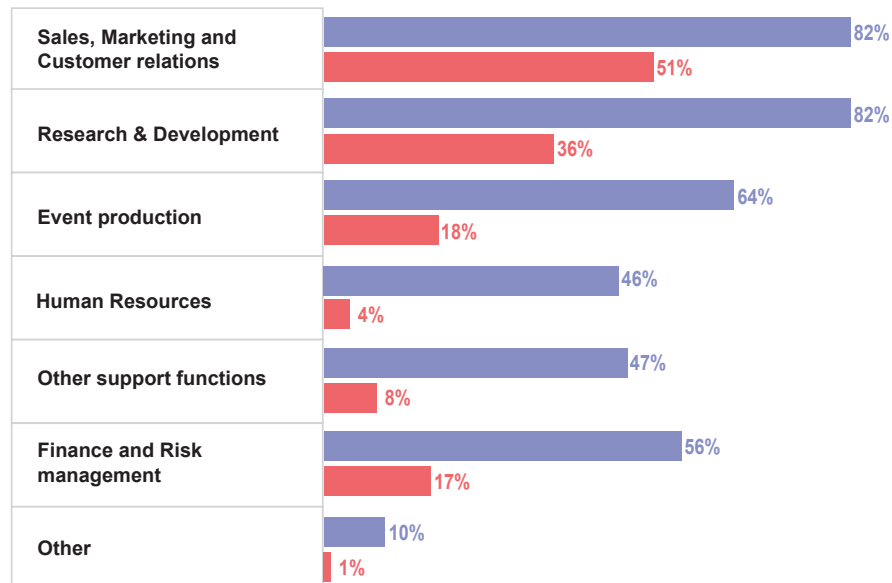
Mid-term (3-5 years)



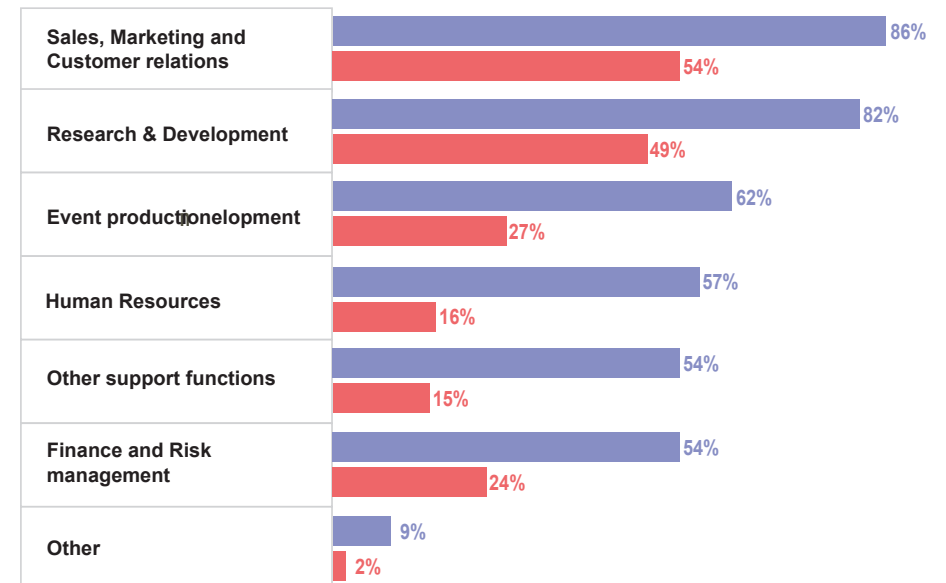


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

Asia/Pacific



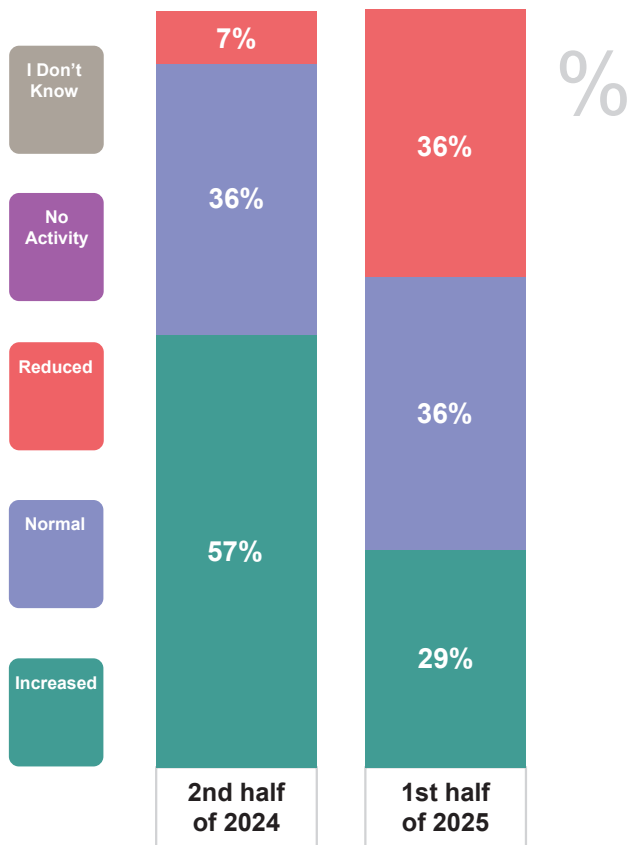
World



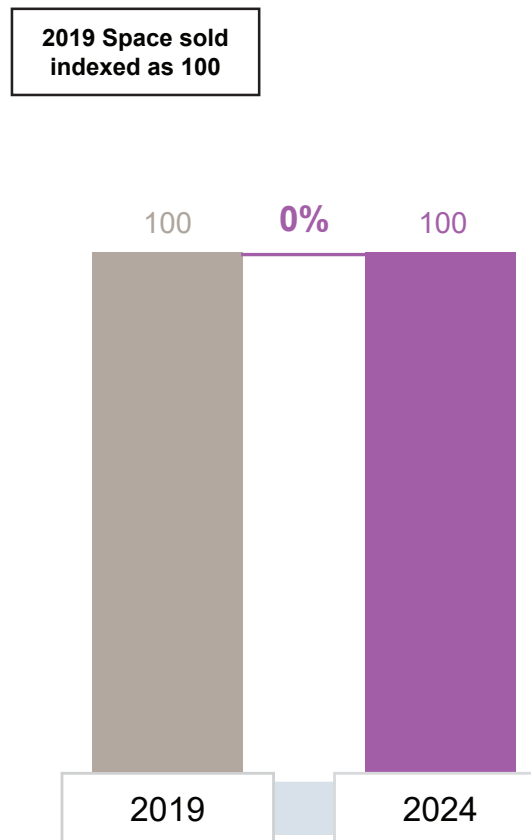
Detailed results for Australia



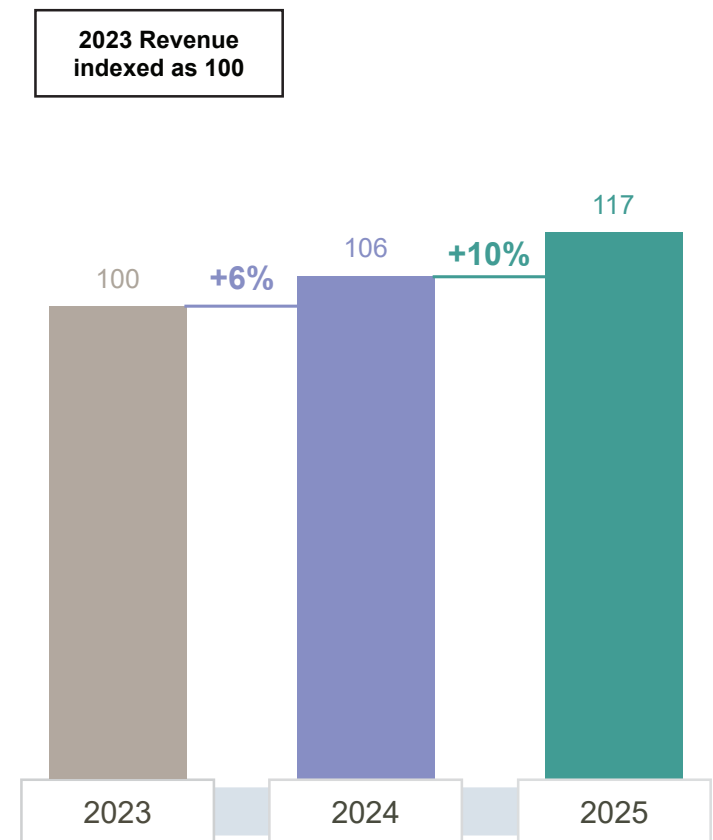
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

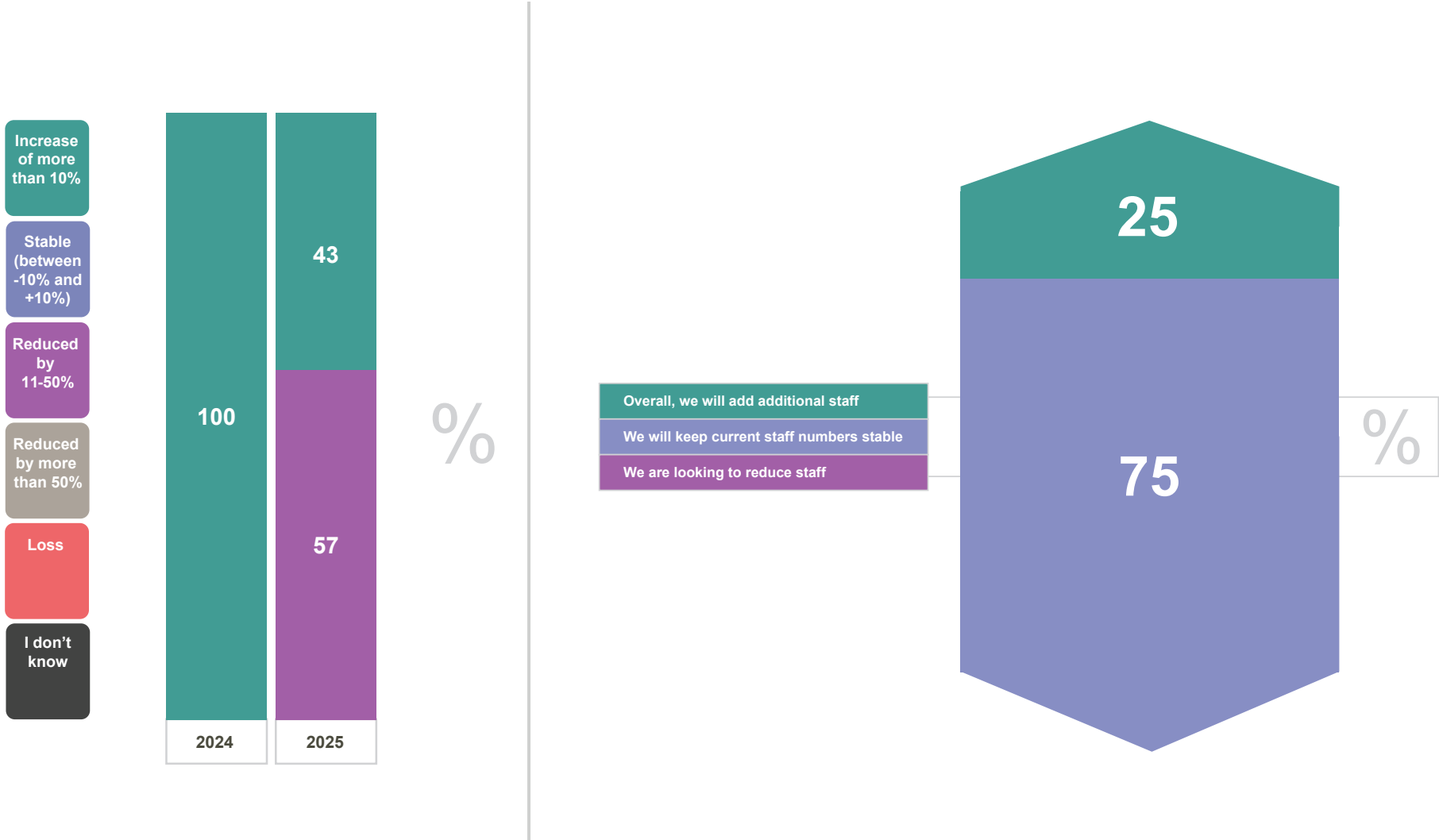


Revenue compared to previous year





How do you plan to develop your workforce in the coming 6 months



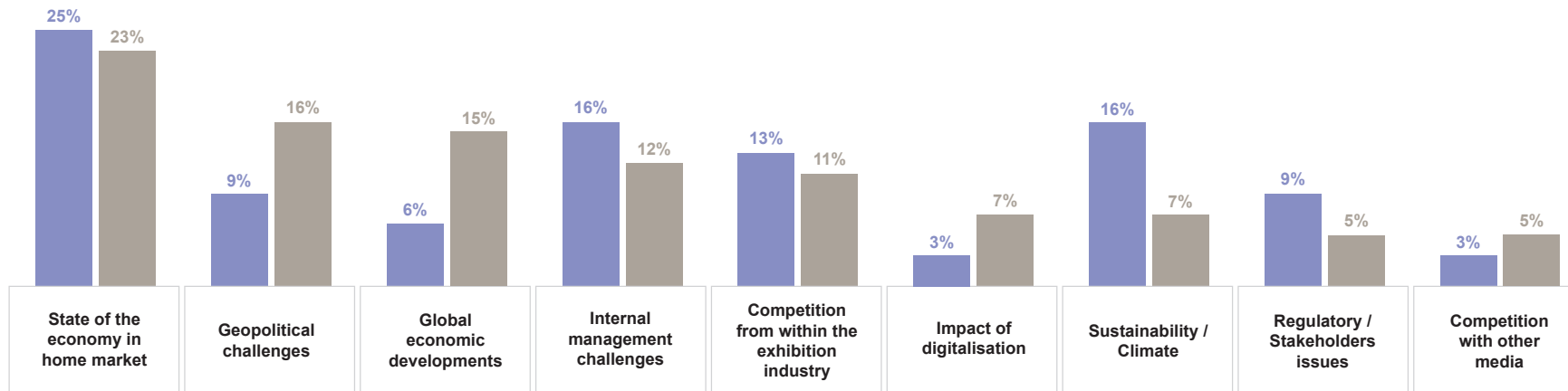


Most important business issues in the exhibition industry right now

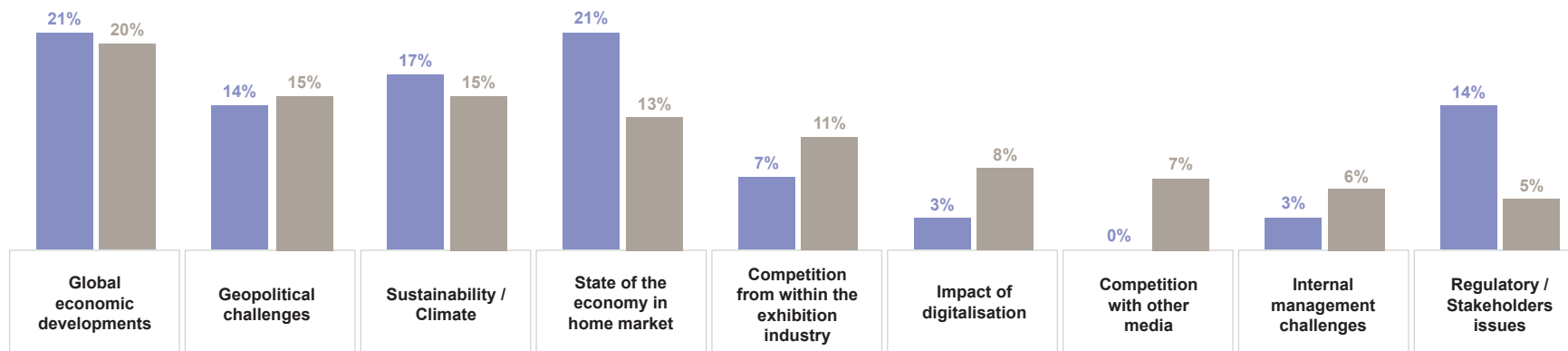
Short term (12-18 months)

Australia

Global

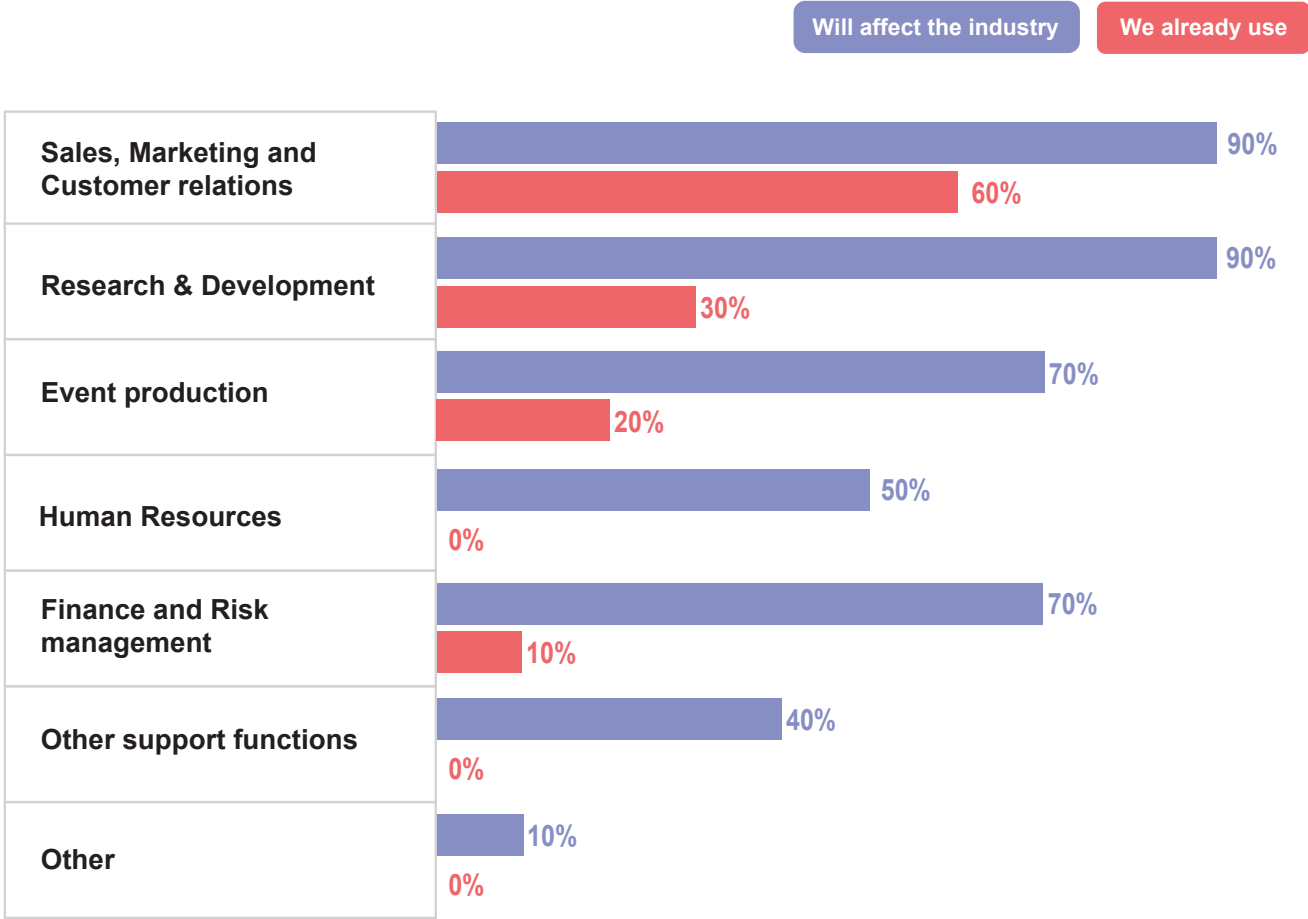


Mid-term (3-5 years)





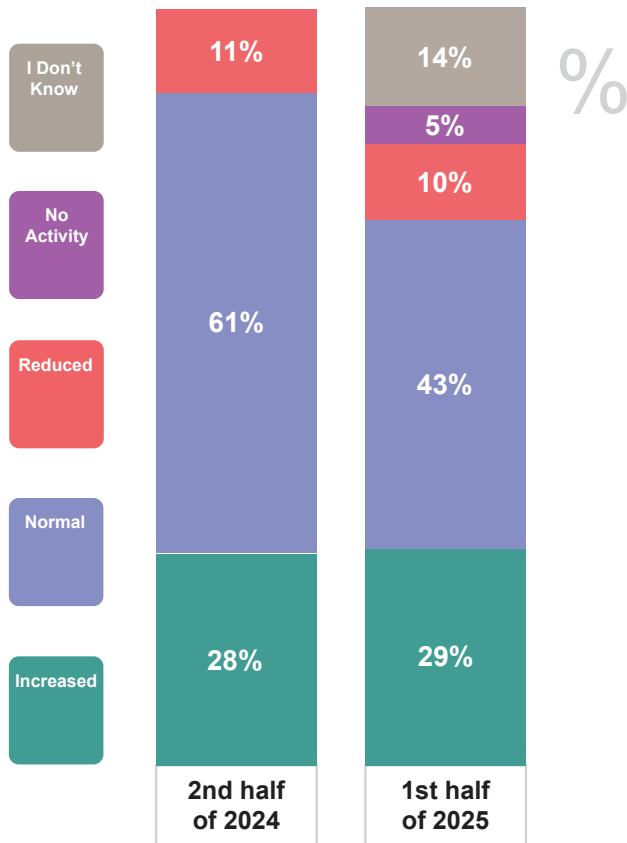
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



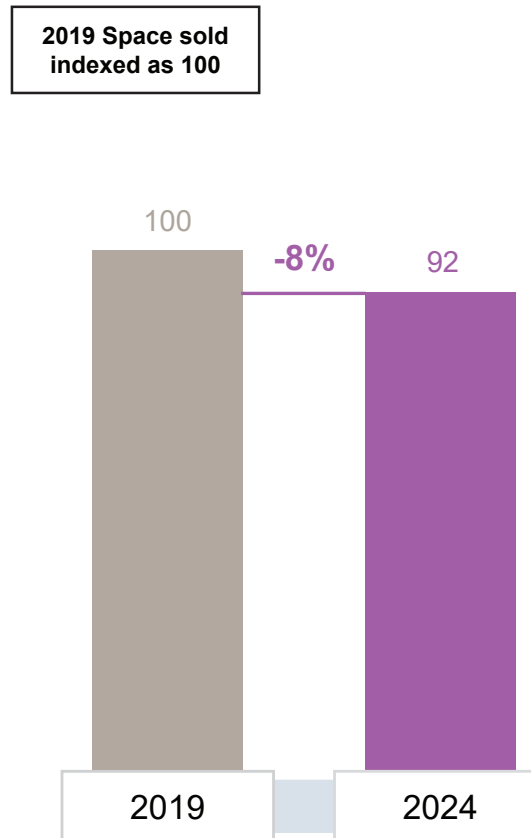
Detailed results for China



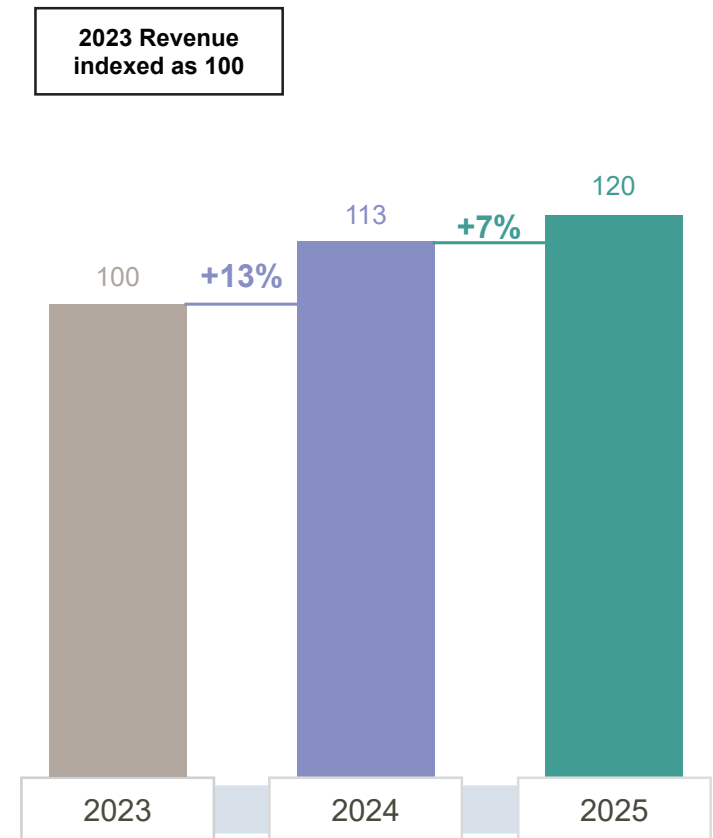
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year



Revenue compared to previous year



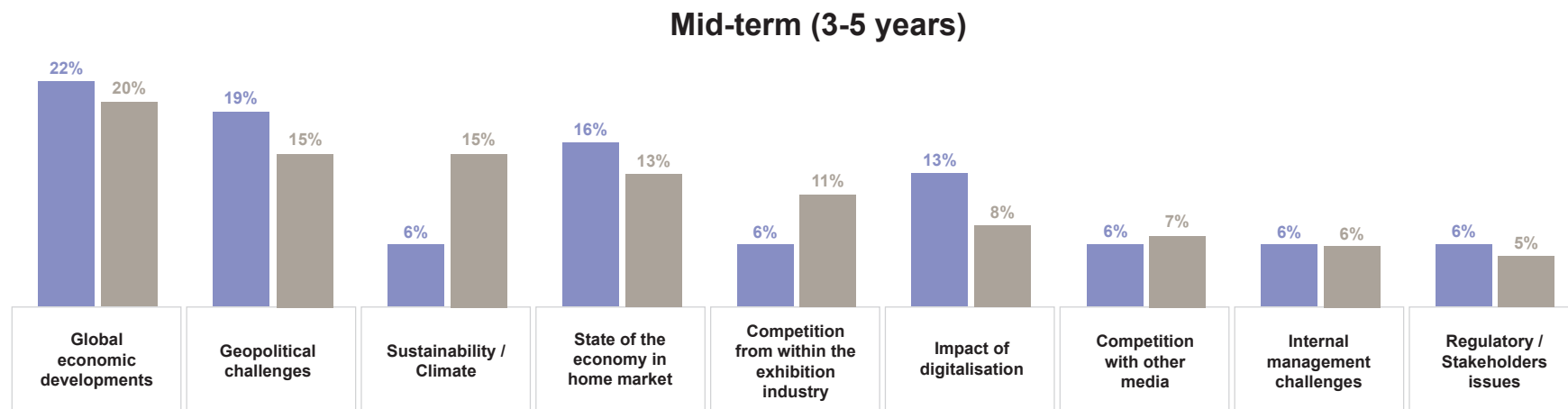
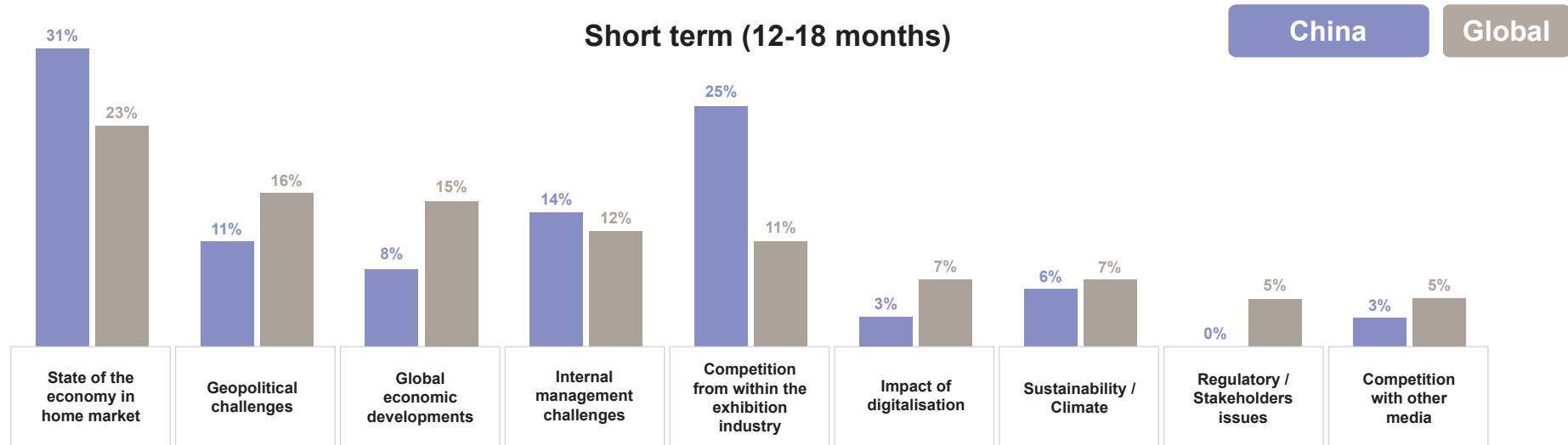


How do you plan to develop your workforce in the coming 6 months



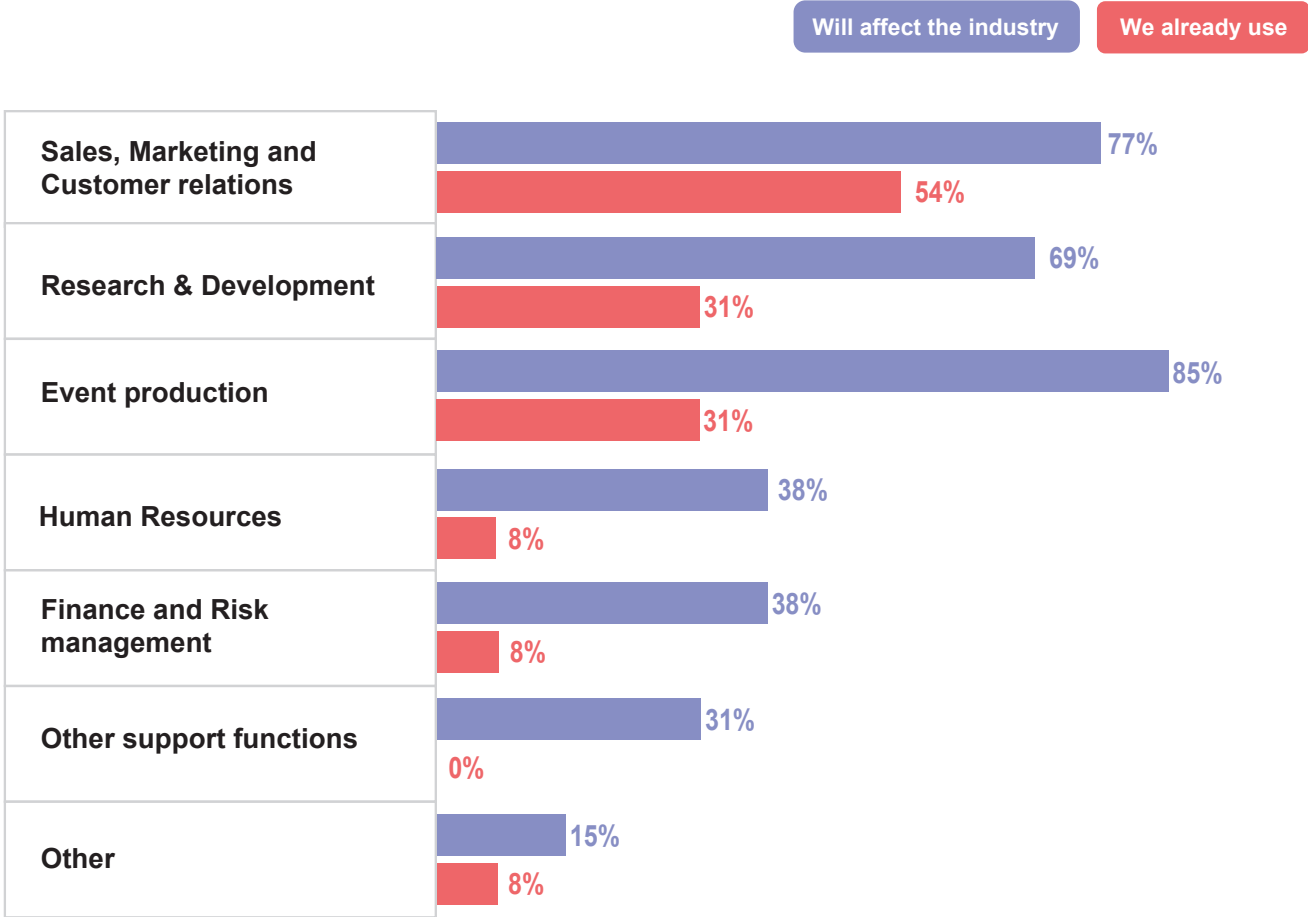


Most important business issues in the exhibition industry right now



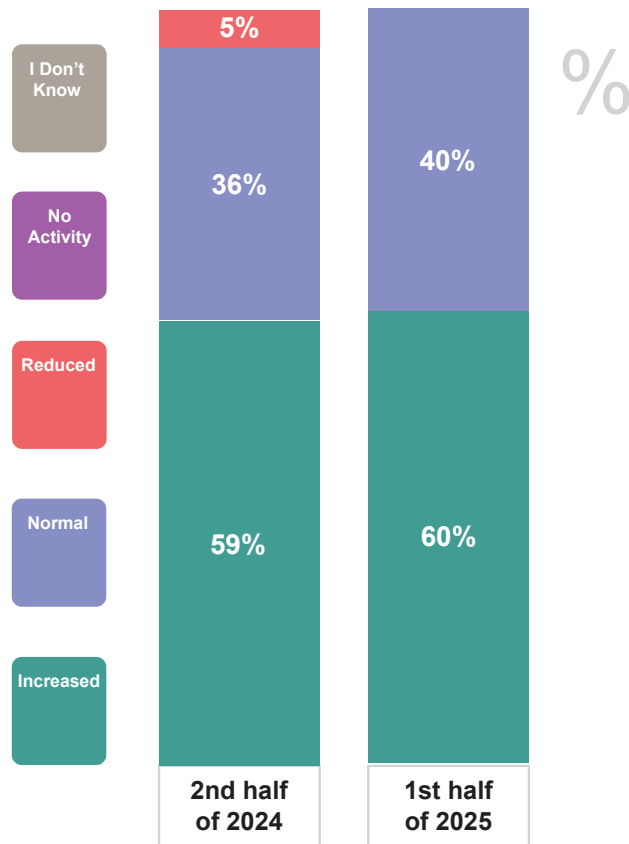


Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others

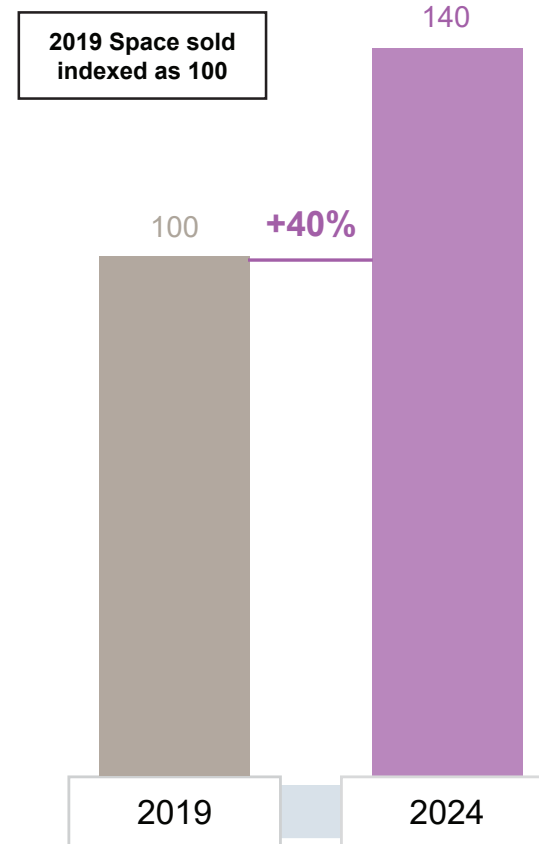




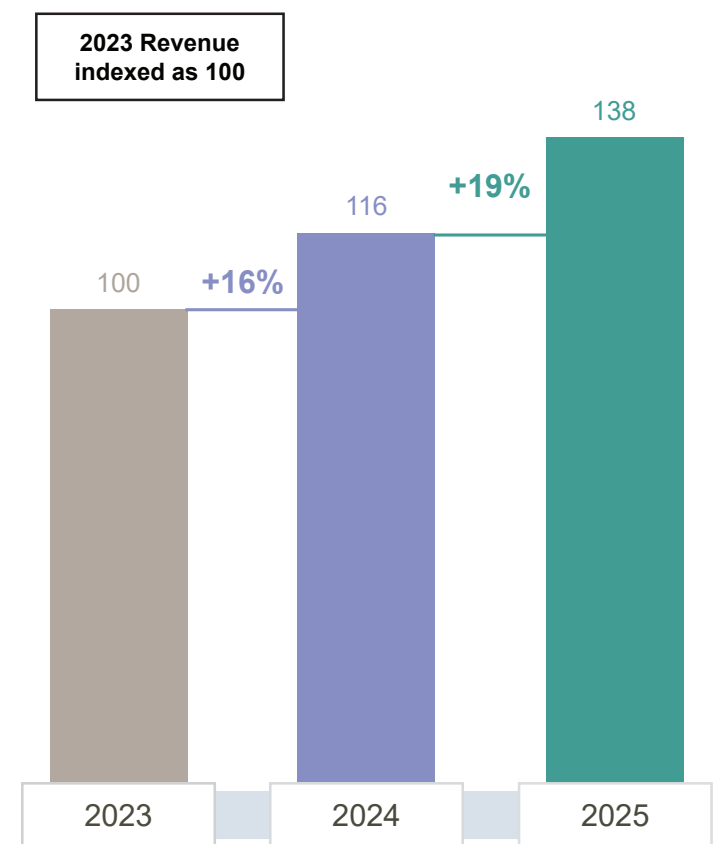
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

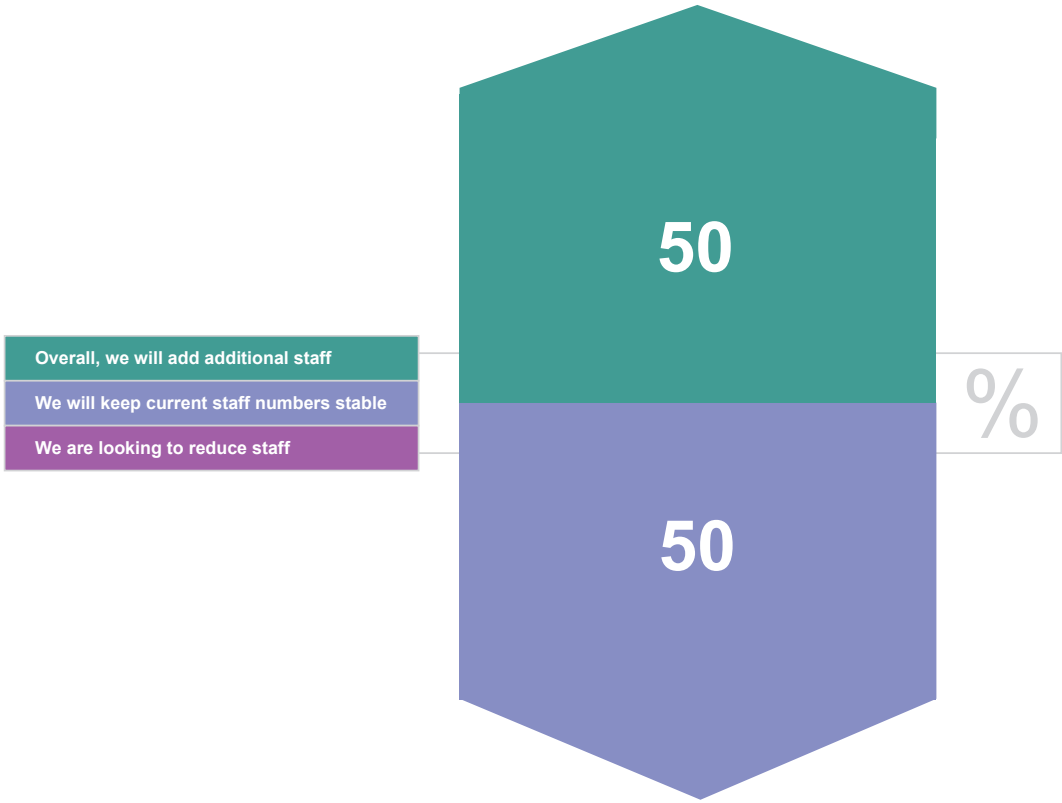


Revenue compared to previous year





How do you plan to develop your workforce in the coming 6 months



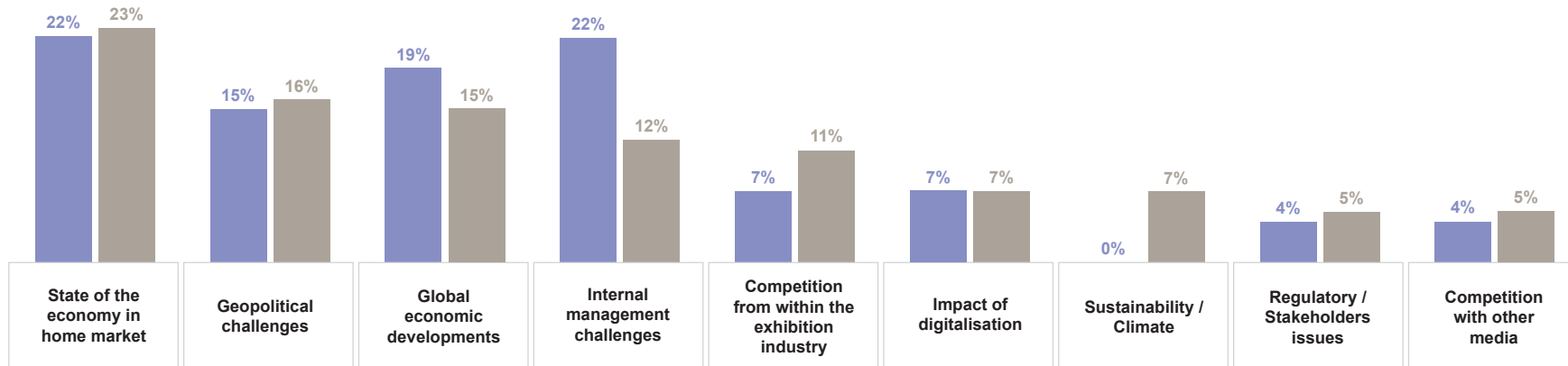


Most important business issues in the exhibition industry right now

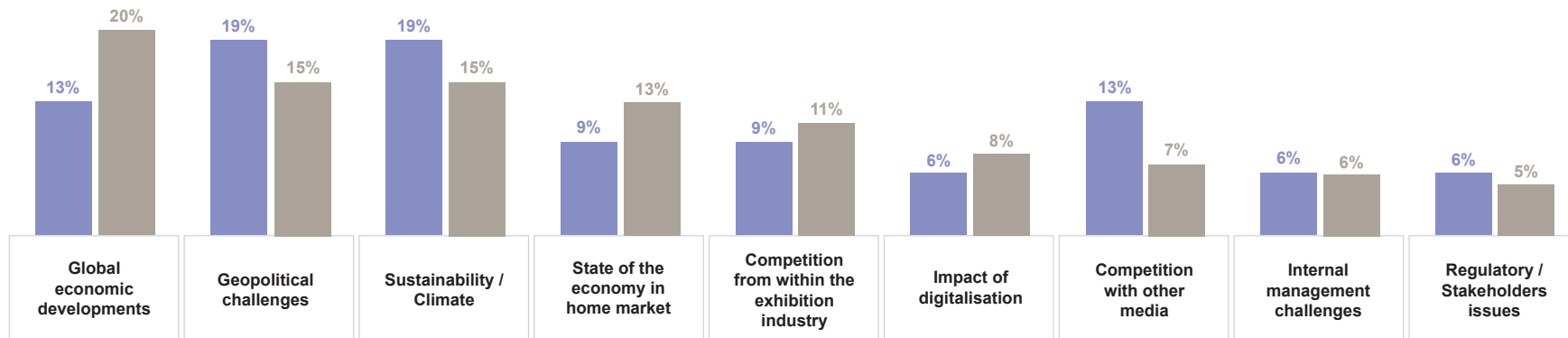
Short term (12-18 months)

India

Global

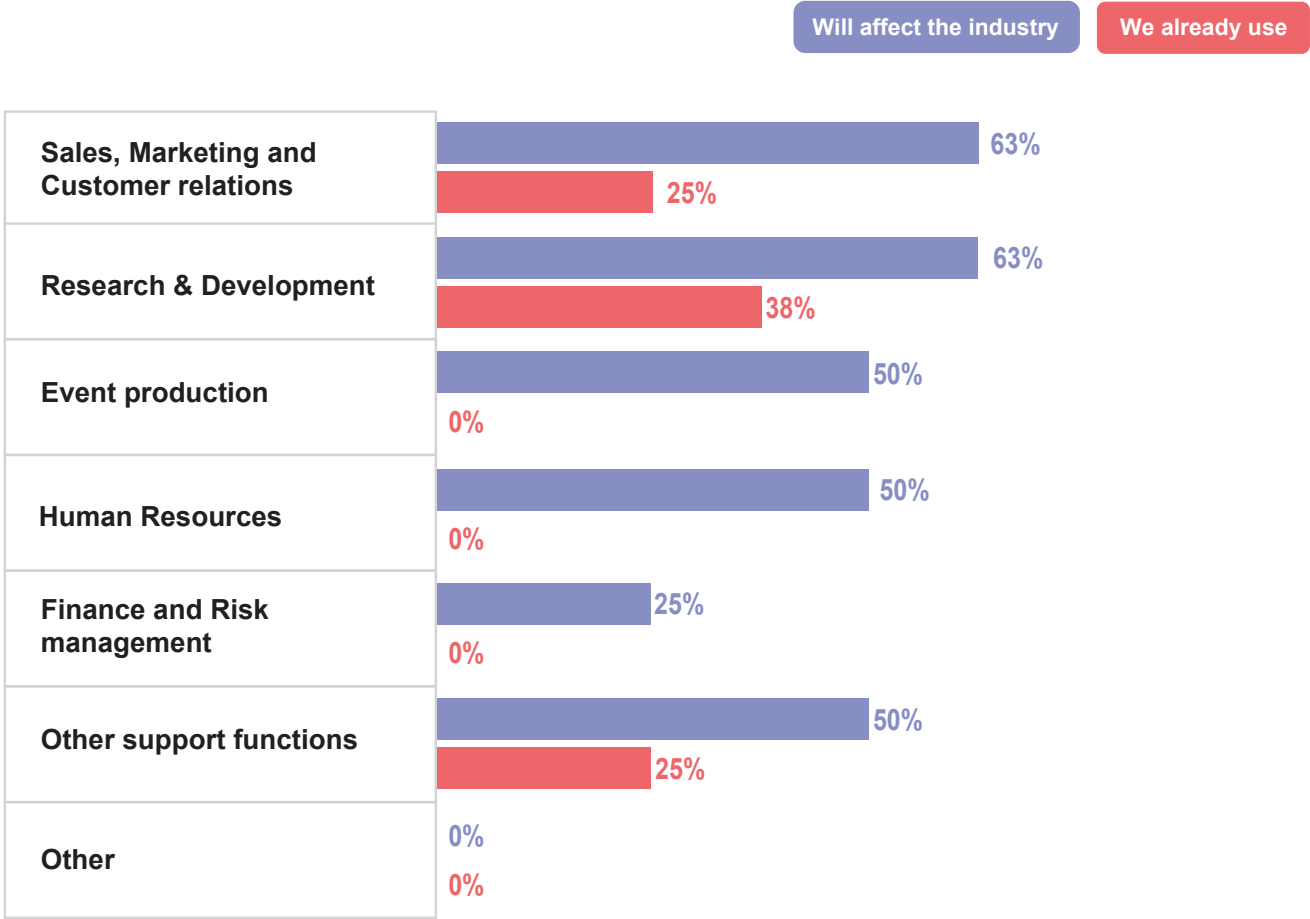


Mid-term (3-5 years)

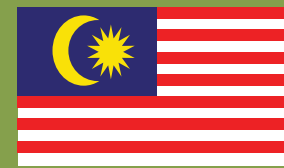




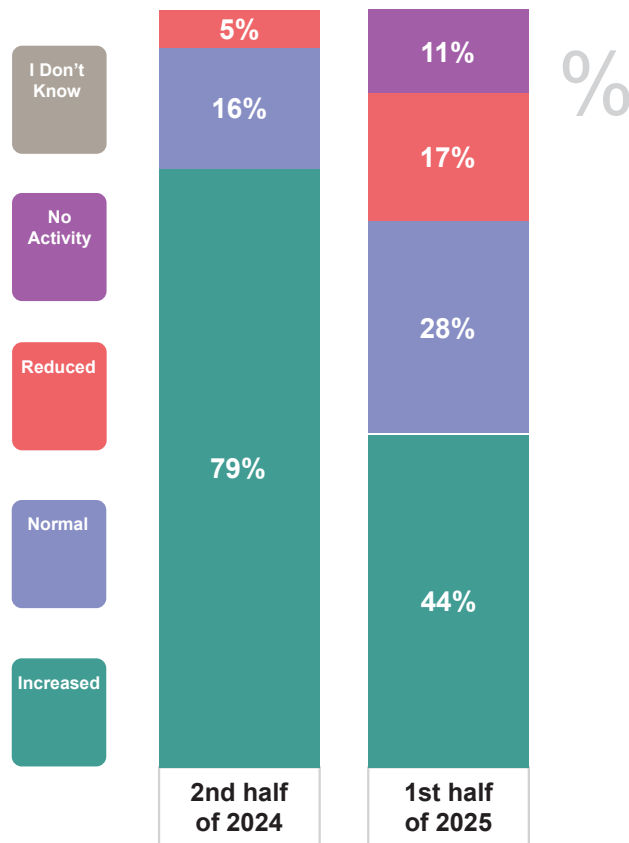
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



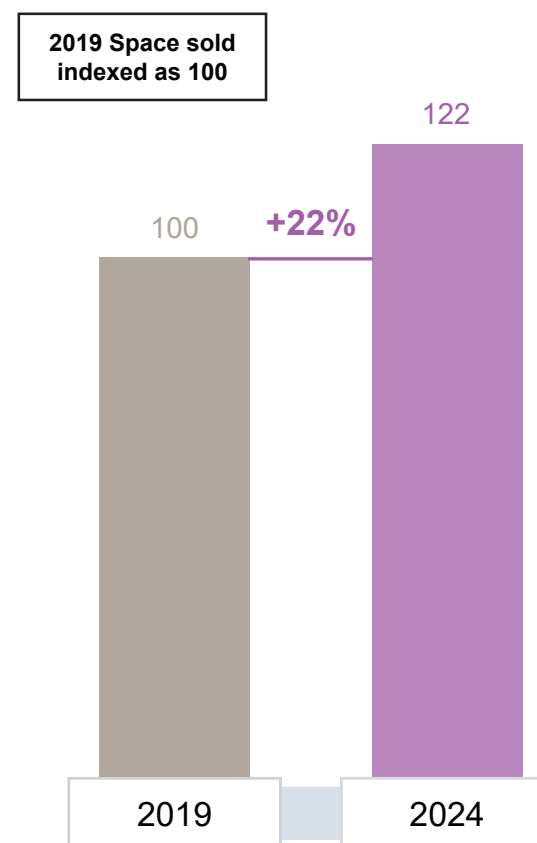
Detailed results for Malaysia



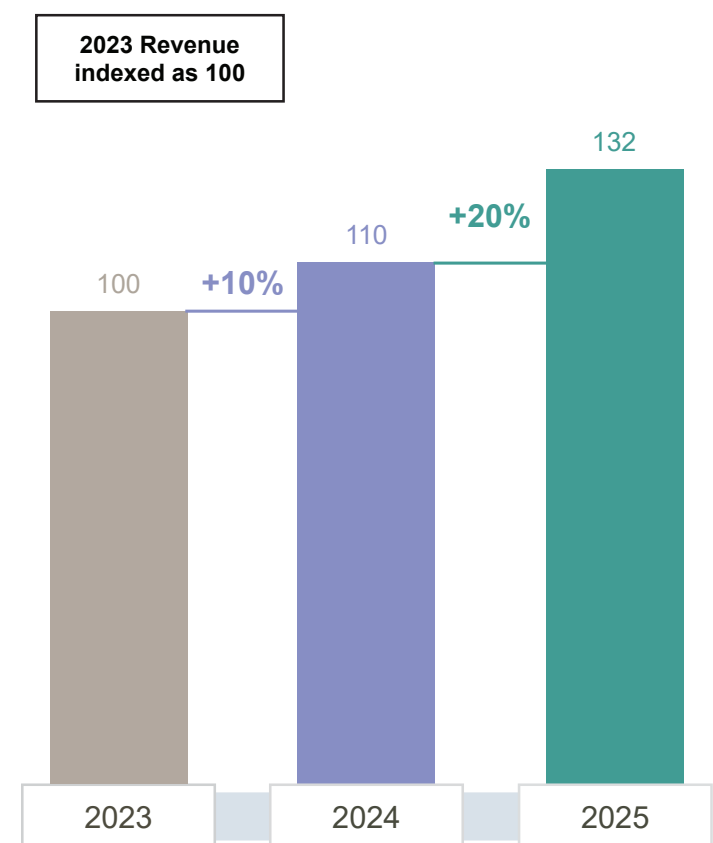
Situation of the industry operations for the current year, and predictions for the next year

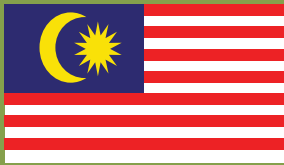


Space sold compared to previous year



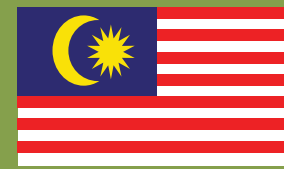
Revenue compared to previous year





How do you plan to develop your workforce in the coming 6 months

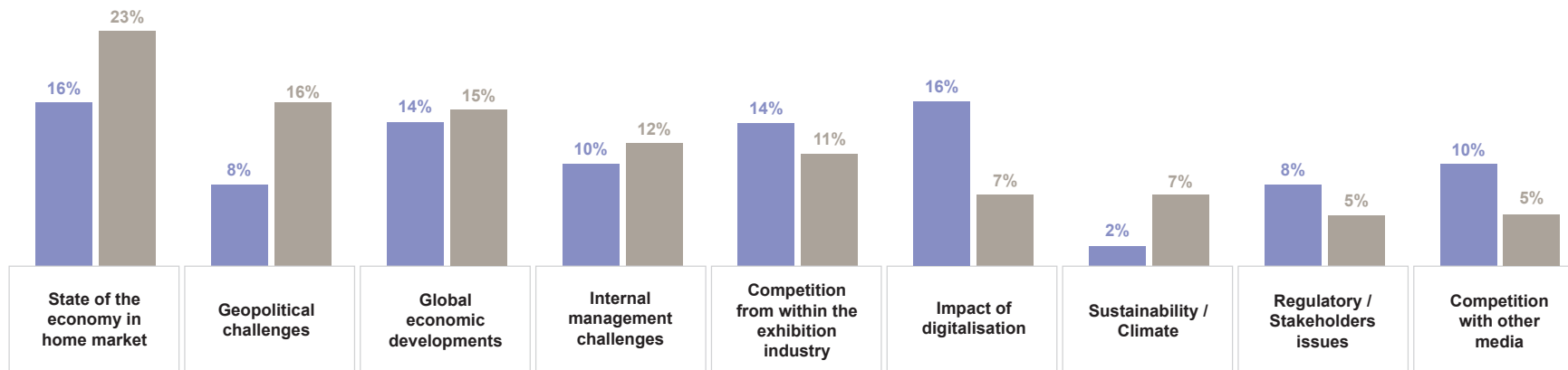




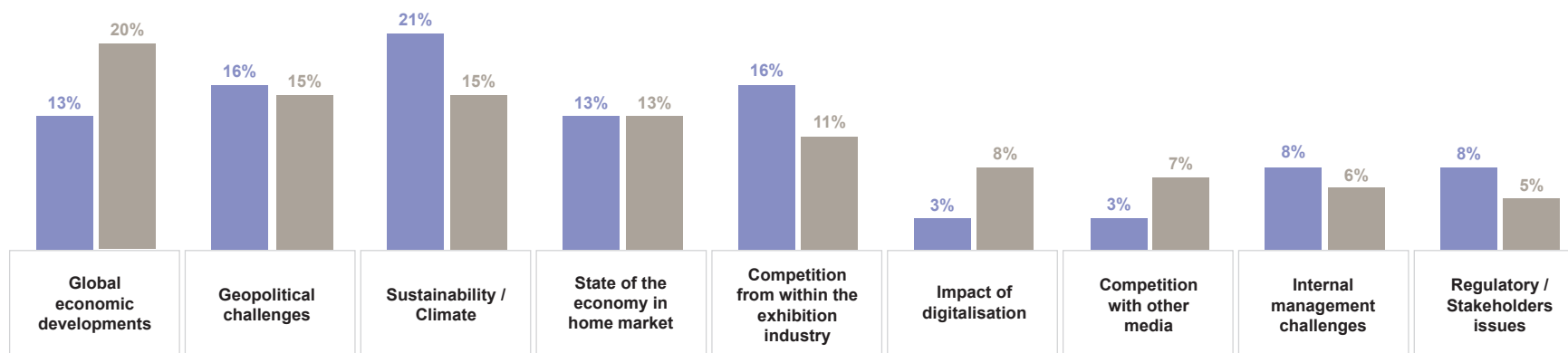
Most important business issues in the exhibition industry right now

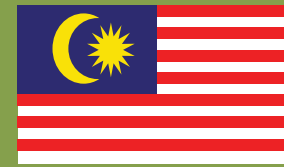
Short term (12-18 months)

Malaysia Global

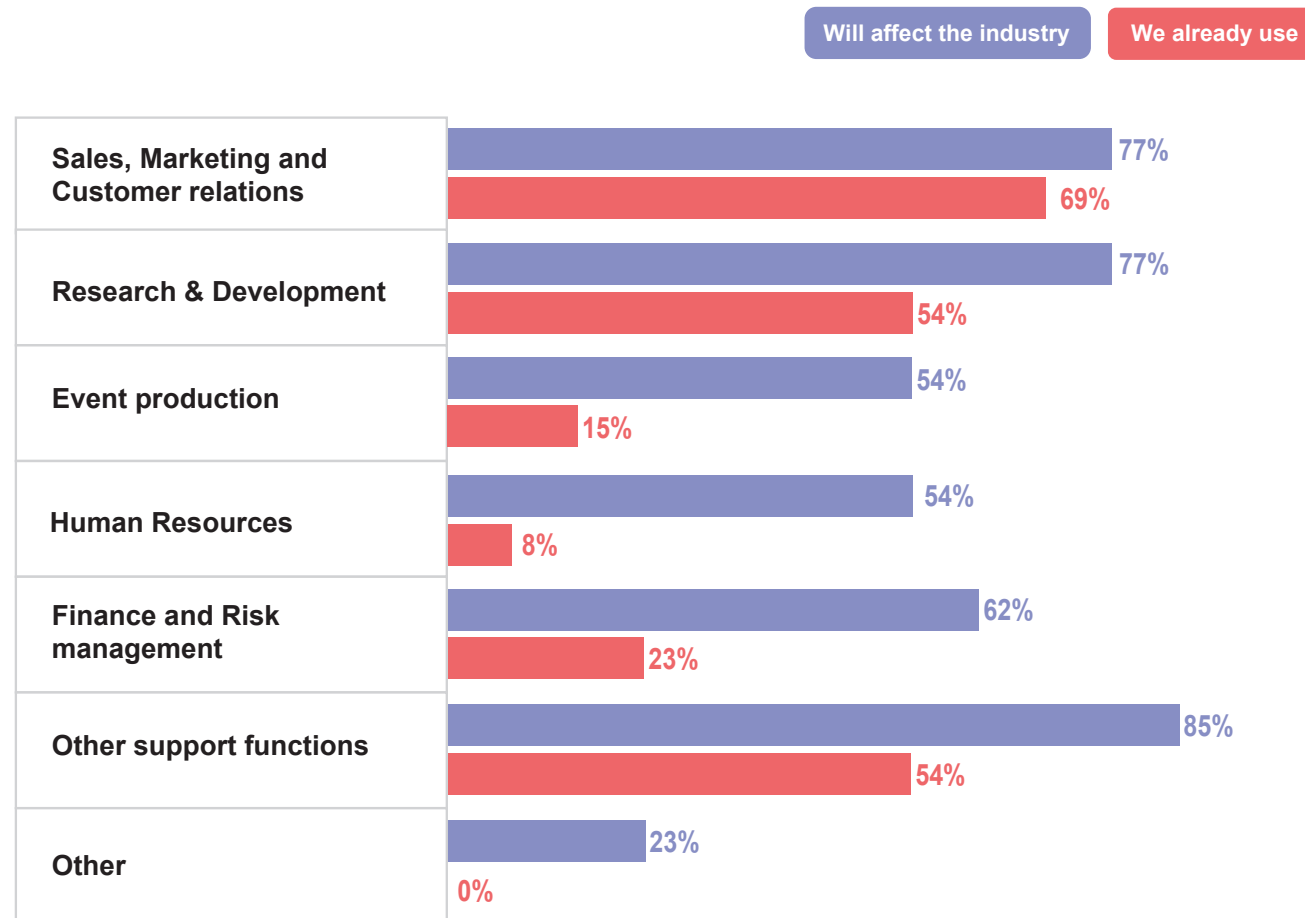


Mid-term (3-5 years)





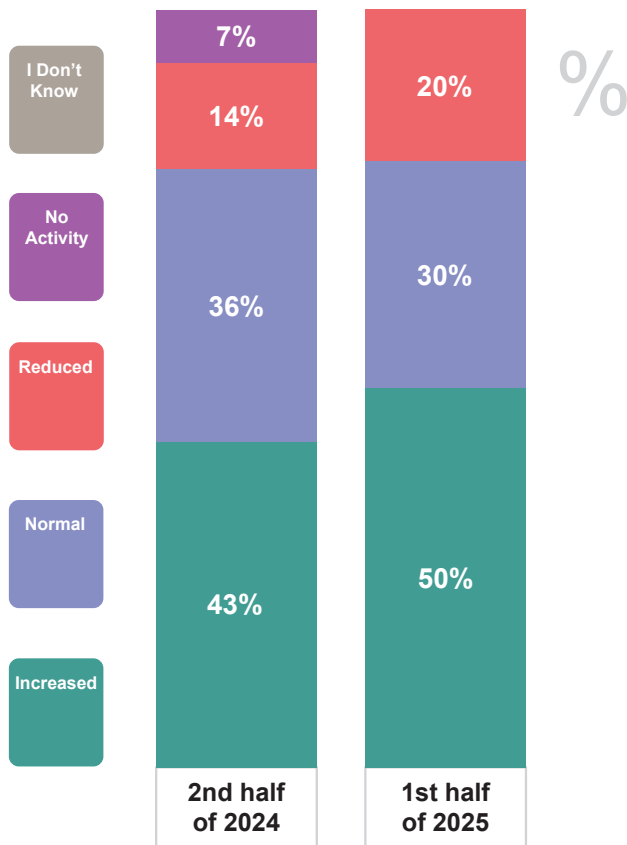
Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



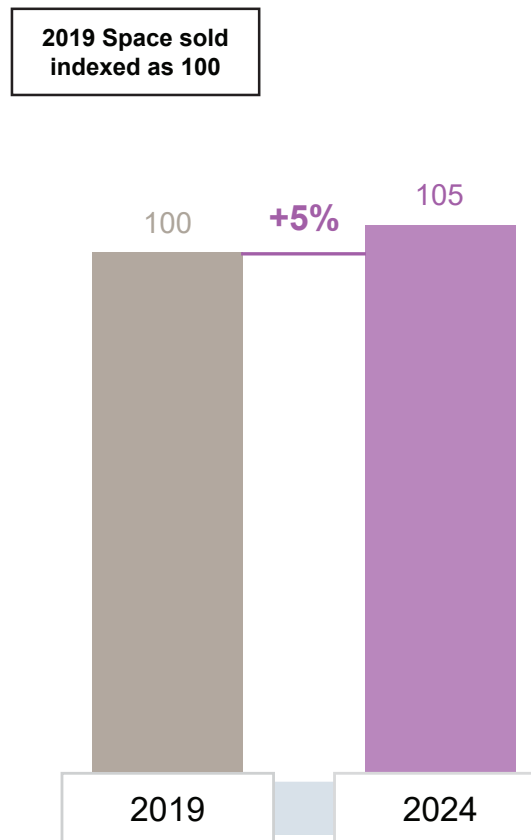
Detailed results for Thailand



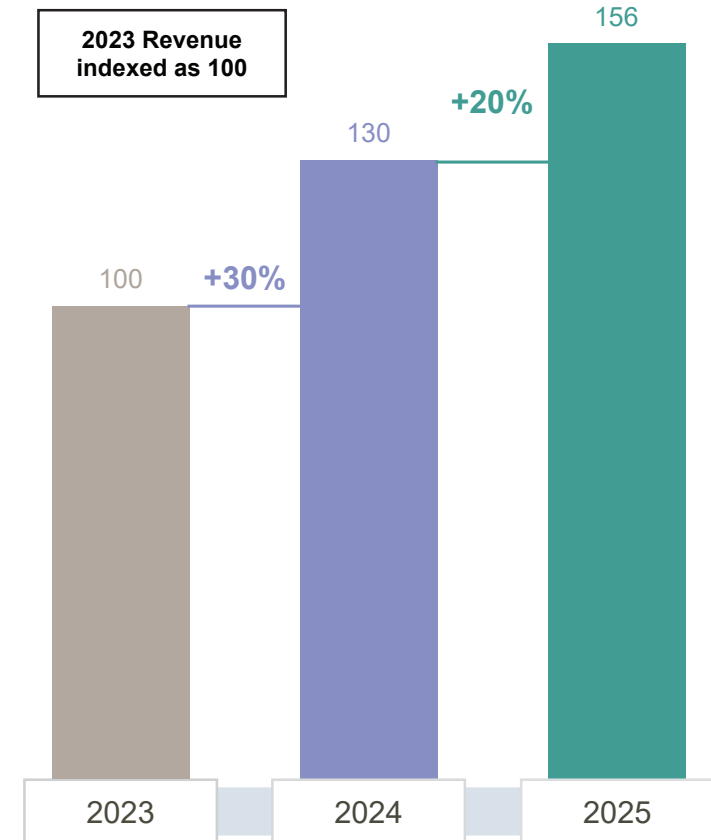
Situation of the industry operations for the current year, and predictions for the next year



Space sold compared to previous year

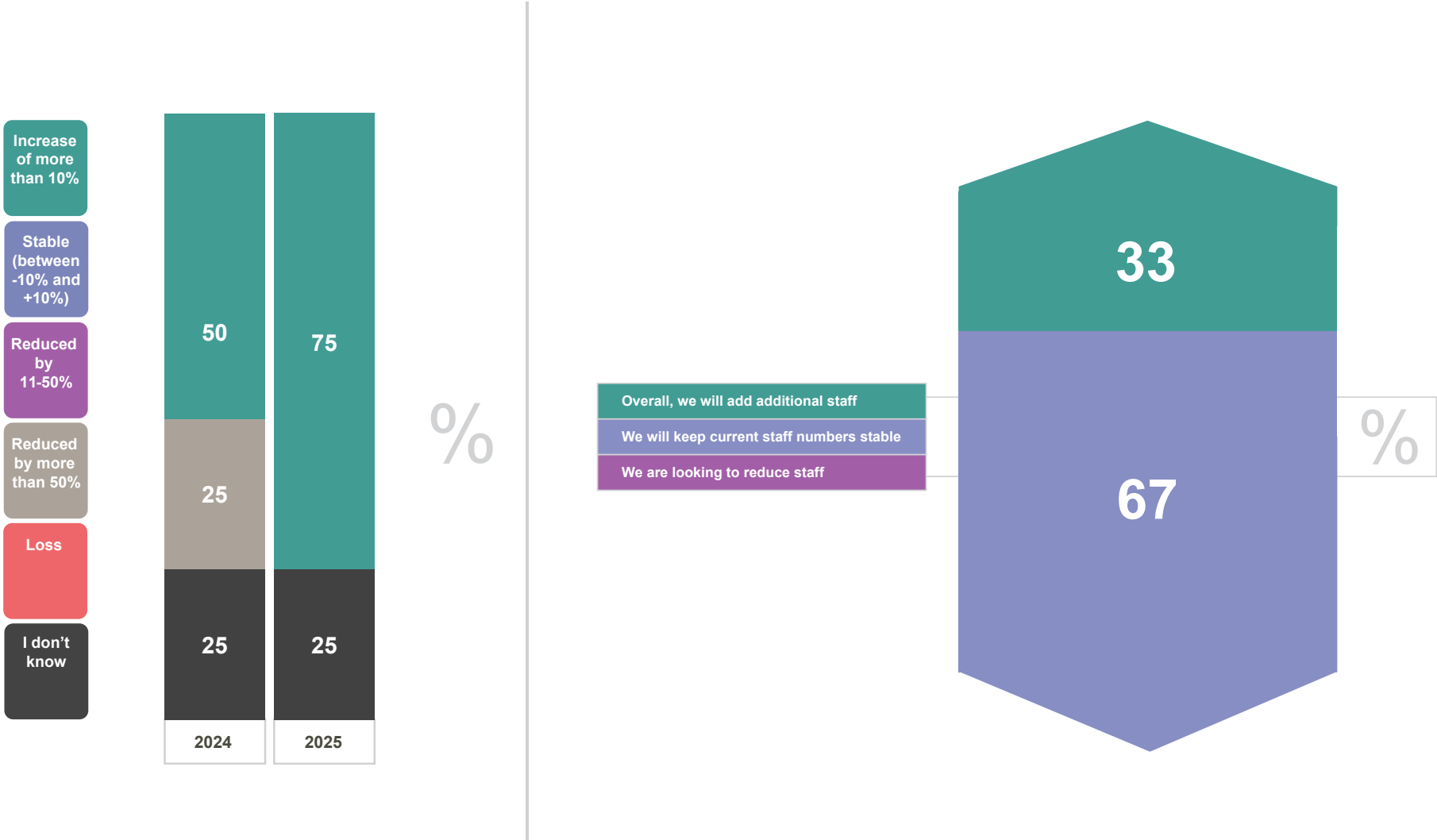


Revenue compared to previous year





How do you plan to develop your workforce in the coming 6 months

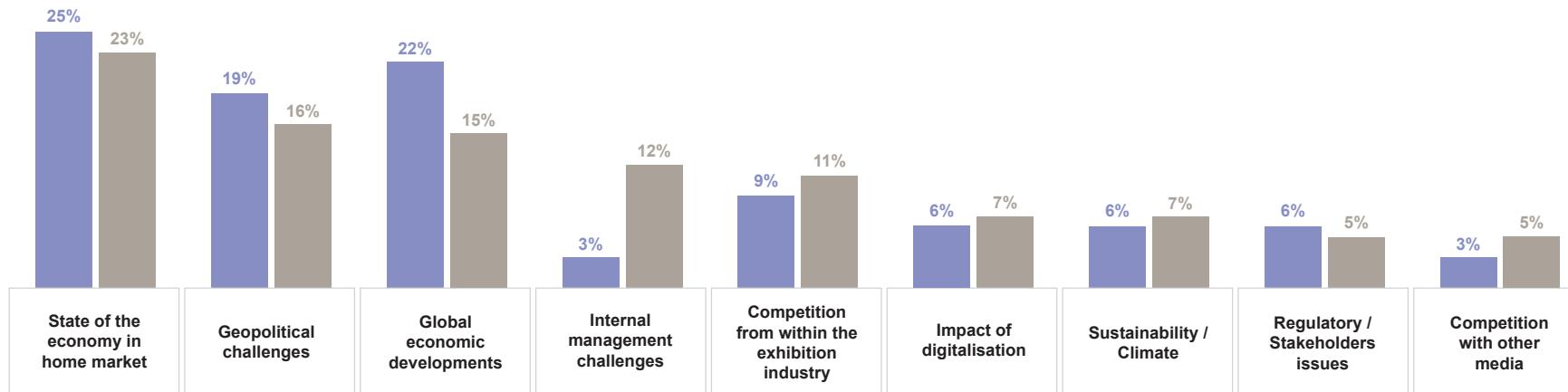




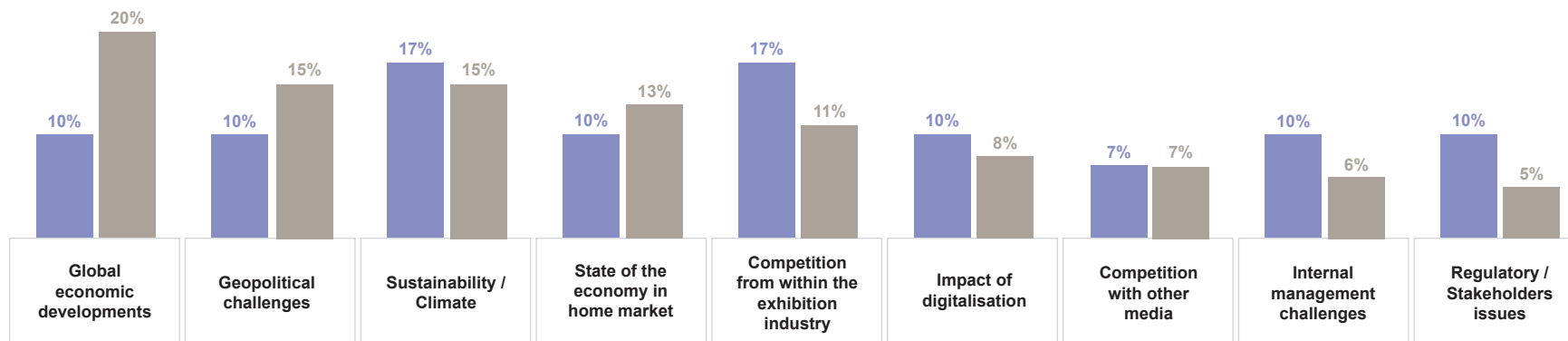
Most important business issues in the exhibition industry right now

Short term (12-18 months)

Thailand Global

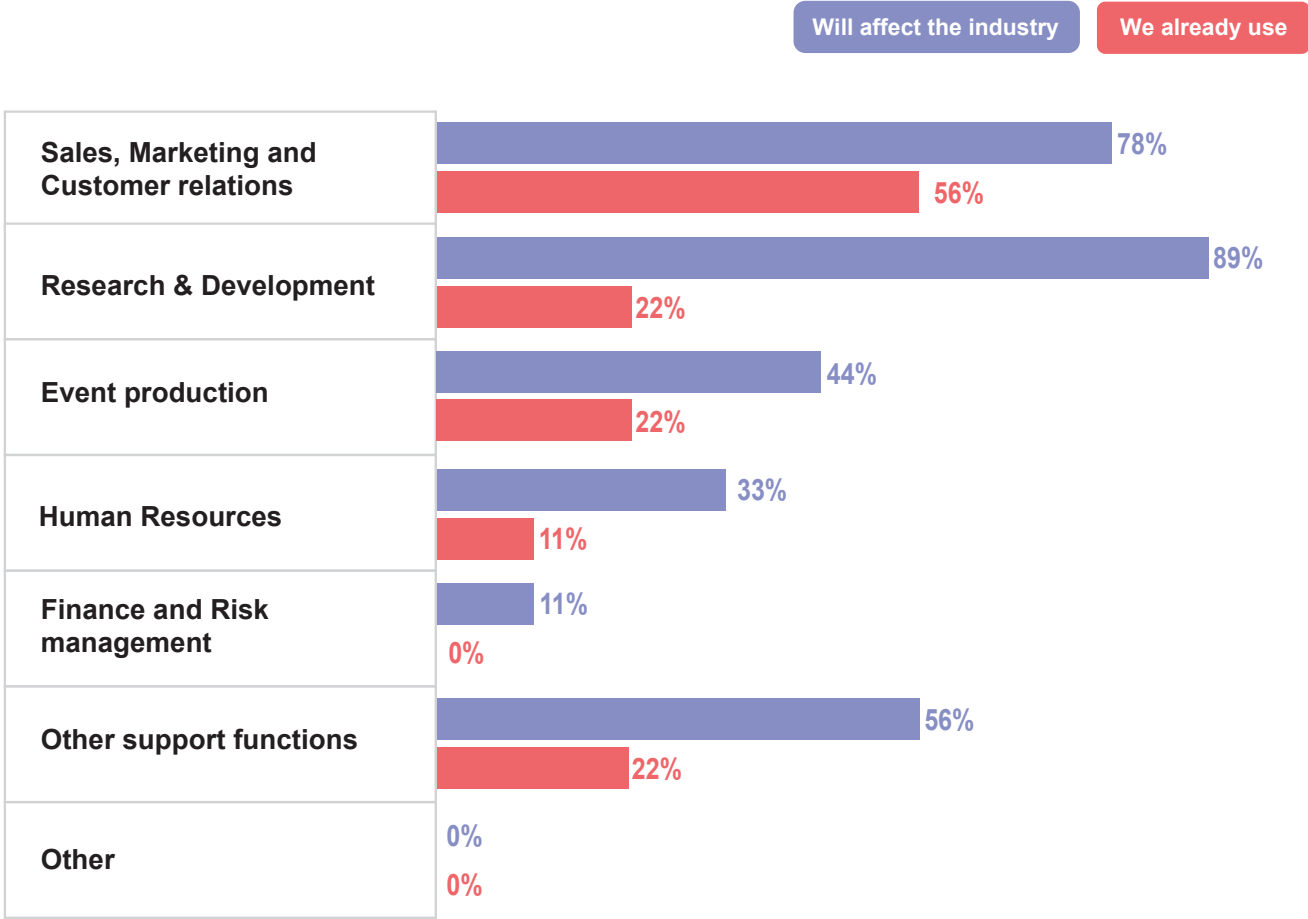


Mid-term (3-5 years)





Potential impact on exhibitions and current use of “generative AI” applications like ChatGPT and others



The Global Barometer survey has been constantly measuring the pulse of the exhibition industry for the past 16 years. This 34th survey was concluded in January 2025. It includes data from 390 companies in 56 countries and regions. The report delivers outlooks and analysis for 19 focus countries and regions. In addition, it analyses 5 aggregated regional zones.

Globally, the **level of operations** in the second half of 2024 has picked up for 6 companies out of 10 (and even 7 out of 10 in North America, but only 5 out of 10 in Asia-Pacific) compared to the year before.

This trend will continue in the coming year with, on average, a percentage of companies reporting an increased activity ranging from 71% in North America, 62% in Central and South America and in the Middle East and Africa, to 60% in Europe and 42% in Asia-Pacific respectively.

In terms of **space rented**, results show a global progression of 9% for 2024 compared with 2019, but with significant variations at the country level, especially for some of the major global markets: while five countries have lower or comparable levels to 2019: Germany (-12%), China (-8%), France (-2%), Australia and the UK (same), nine have higher levels than the global average: Mexico and Spain (+13%), Italy (+15%), Saudi Arabia (+17%), Brazil and the UAE (+18%), Malaysia (+22%), Argentina (+34%), and India (+40%).

Revenues increased by 16% on average in 2024, and this trend is expected to continue. In 2025, revenues are expected to grow again by an average of 18% year on year. These general trends vary from one country to another: revenues from 2024 compared to 2023 increased by more than 20% in Argentina (+49%), Thailand (+30%), Mexico (+24%), Brazil (+23%) and Spain (+21%), and revenues from 2025 compared to 2024 are expected to increase by more than 20% in Argentina (+39%), the UK (+37%), Italy (+34%), Greece (+25%) and Colombia (+23%).

In terms of **operating profits** for 2024, 82% of the companies declare an annual increase of more than 10%, and 11% declare a decrease or a loss. Similar levels are anticipated for the 2025 operating profits, with 77% planning an annual increase of more than 10%, and 14% reporting a decrease or a loss.

Globally, 46% of companies declare that they plan to increase their **staff numbers**, while another 51% declare that they will keep current staff numbers stable. Those levels follow similar positive ones measured six months ago (48% for both increase and stability).

The **most pressing business issue for the short term** remains “State of the economy in home market” (23% of answers globally – 22% six months ago - and the main issue in all regions, except the Middle East and Africa, where it ranks second). “Geopolitical challenges” (16% of answers, compared to 14% six months ago, and the top issue for the Middle East and Africa) and “Global economic developments” (15%, same as six months ago) come in as the second and third most important issues globally. “Internal management challenges” (12%), “Competition from within the exhibition industry” (11%), followed by “Impact of digitalisation” and “Sustainability / Climate” (both 7%), and “Regulatory / Stakeholders issues” and “Competition with other media” (both 5%) follow.

There is an interesting change in ranking when comparing the most important issues in the short-term versus **mid-term**: “Global economic developments” is the top mid-term issue with 20% of answers (compared to the short-term issues, where it ranks third with 15% of answers), and while “Geopolitical challenges” remains the second issue for both mid-term and short-term (with 15% and 16% of answers, respectively), “Sustainability / Climate” jumps to the third position for the mid-term (with almost the same level of 15% as the second one), compared to the seventh position on the short-term (with 7% of answers).

Globally, there is an overwhelming consensus that **AI will affect the industry**, with 92% of companies stating this (+5% compared to mid-2023 when we introduced the question).

The two main areas expected to be most affected by the development of AI are the same in all regions: “Sales, Marketing and Customer relations” (86% globally) and “Research & Development” (82%). These are precisely the areas where generative AI applications are already mostly used and in all regions, with a very fast recent rhythm of adoption: 54% globally for “Sales, Marketing and Customer relations” (+ 15% compared to six months ago, and +17% to a year ago), and 49% globally for “Research & Development” (+ 11% compared to six months ago, and + 14% to a year ago).

Other areas expected to be most affected by the development of AI are all selected by most companies for the time in the 3 successive surveys: “Event production” (62%), “Human Resources” (57%), “Finance and Risk management” and “Other support functions” (both 54%).

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION! THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2025 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 390 (in 56 countries/regions)

North America	36	Europe	127	Middle East & Africa	55
Canada	3	Albania	1	Egypt	3
Mexico	15	Belgium	3	Iraq	3
USA	18	Bulgaria	1	Kenya	1
		Croatia	1	Lebanon	2
Central & South America	68	Finland	1	Morocco	1
Argentina	10	France	12	Oman	1
Bolivia	3	Georgia	1	Qatar	2
Brazil	30	Germany	15	Saudi Arabia	11
Colombia	14	Greece	17	South Africa	16
Costa Rica	2	Ireland	2	Tanzania	1
El Salvador	1	Italy	14	United Arab Emirates	14
Panama	3	Netherlands	3		
Peru	5	Norway	1	Asia-Pacific	104
		Poland	3	Australia	14
		Portugal	4	China	20
		Romania	1	Hong Kong	5
		Slovenia	2	India	16
		Spain	12	Indonesia	3
		Sweden	4	Japan	5
		Switzerland	1	Macau	2
		Türkiye	10	Malaysia	18
		United Kingdom	18	South Korea	5
				Taipei	3
				Thailand	11
				Vietnam	2

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