



**Associazione Esposizioni e Fiere Italiane**  
Italian Exhibition & Trade Fair Association

**Press**

## **AEFI ECONOMIC OBSERVATORY ON THE TRADE FAIR SECTOR:**

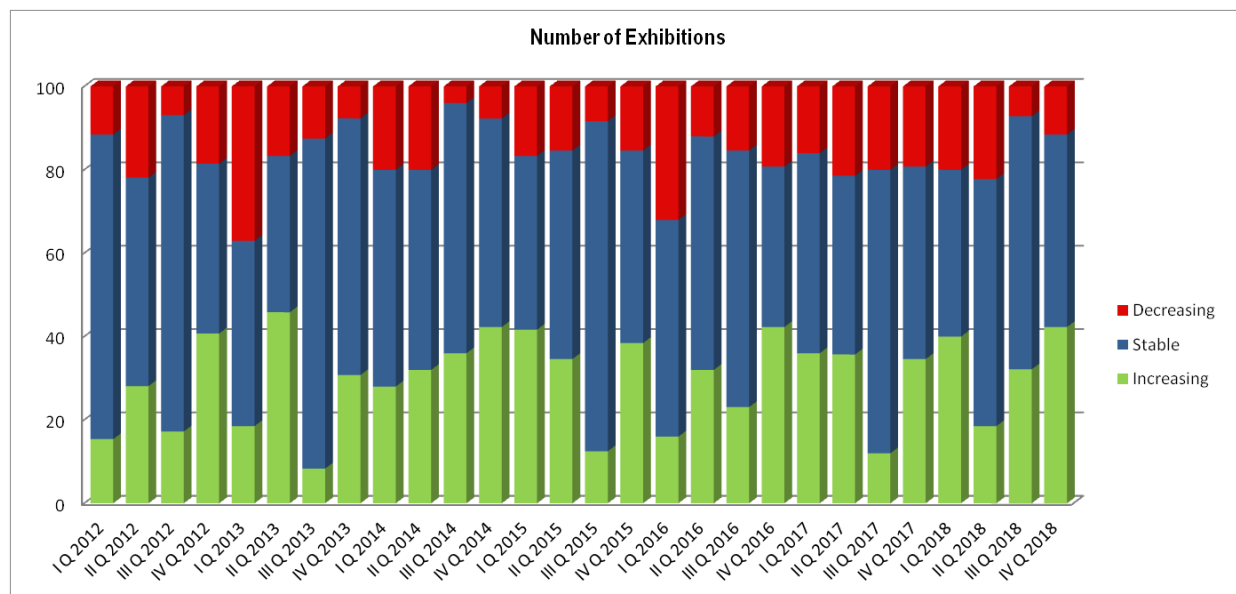
**For Italian exhibition centres, 2018 closes with positive results and optimism for the new year.  
Significant performance from international exhibitions certified in 2018.**

*Rimini, 7 February 2019* - The 39th quarterly survey of trends in the exhibitions sector run by the **Economic Observatory of [AEFI-Associazione Esposizioni e Fiere Italiane](#)** for the period **October-December 2018** shows an overall positive situation - both relative to the previous quarter and in comparison with the same period of the previous year - and confirms the capacity of the trade fairs sector to resist the economic downturn, still unaffected by the general slowdown of the Italian economy.

The qualitative survey, which involved 26 AEFI-member Italian trade fair districts – through the positive and negative balances defined on the basis of responses from members who took part in the analysis(\*) – highlights a good trend for all the indicators considered: number of exhibitions, exhibitors and visitors, and space taken. This positive trend is also reflected in turnover. The resistance of the industry has been reinforced by the optimism of our associates for the first months of 2019.

The **number of exhibitions** started to grow again over the last quarter (42.29% of the districts in the survey hosted more shows and 46.18% recorded a static situation, highlighting the resilience of the system). The total +31% growth is higher than that of the third quarter of 2017, at +15%.

The trend of the total, shown in the graph, highlights the recovered growth which has not only reduced the stationary results, but effectively compensates the slight growth in the number of members who have experienced a downturn in business.



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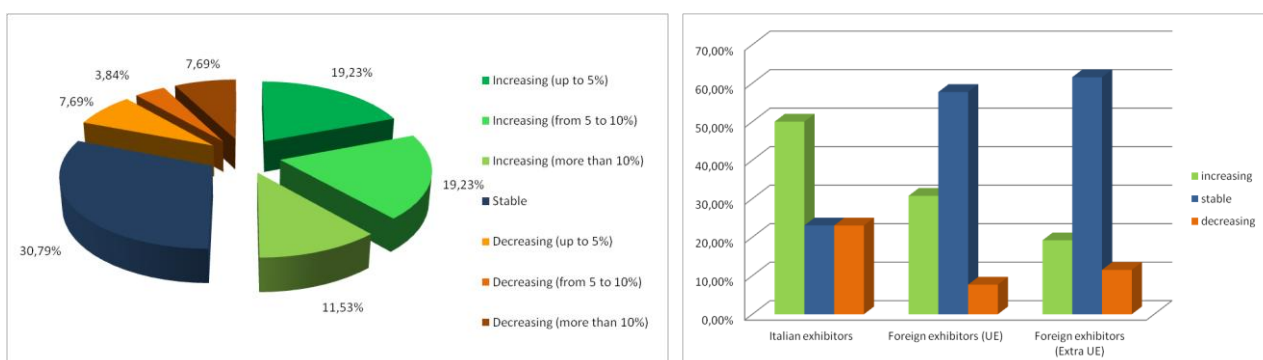


The **number of exhibitors** has increased significantly: half (49.99%) of the 26 members who took part in the survey reported an increase, while 19.22% of them reported a downturn.

The balance of +31% – the difference between those who foresee an increase and those who foresee a decrease – indicates distinctly positive performance, in line with the end of 2017 and slightly increased over the previous quarter (+29%).

An analysis of exhibitor countries shows that both Italians and Europeans are growing their participation (+27% and +23% respectively). The totals for non-EU country exhibitors are still positive, although somewhat less so (+8%).

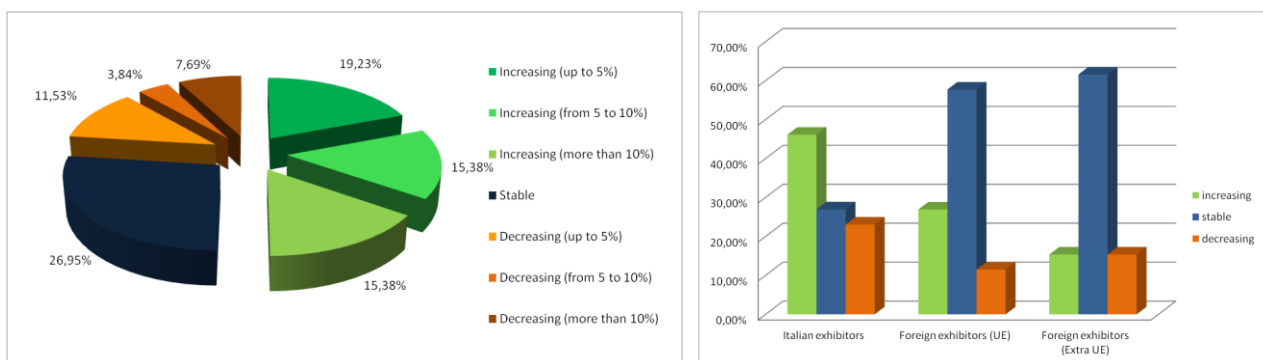
### TOTAL NUMBER OF EXHIBITORS October–December quarter 2018



**Rented exhibition space** is also up, thanks to the increase in the number of both fairs and exhibitors: half of our associates who participated in the survey reported growth. The balance of +27% is lower with respect to the previous quarter, but is definitely positive compared to the same period of the previous year (+19%).

The greatest contribution to the total rented space was made by Italian exhibitors (up +23%), followed by other Europeans at +15%. The area booked by non-EU exhibitors remains unchanged.

### TOTAL RENTED EXHIBITION SPACE October–December quarter 2018



Data regarding the flow of **visitors** – up for 40% of respondents, down for 36% - reflects effectively less encouraging performance than the previous quarter. The total growth of +4% is less than that reported for the end of 2017 (+15%).

If we look at exhibitor countries, Europeans grew particularly strongly at +19% over the last quarter.



**Turnover** is up by +23% for the quarter, due to the % of responding members who reported growth (46.14%) or a downturn (23.06%). This total confirms the good performance we saw the previous quarter (+29%) as well as improvement of the same period of 2017 (zero growth).

**Optimism for the new year.** 38.44% of the districts that took part in the survey foresee an increase in the number of exhibitions, while around 54% predict an increase in exhibitors and space taken. Expectations concerning the number of visitors are also decidedly promising: an increase is predicted by 48% of respondents, with 44% expecting no change. The balance of +40% reinforces this positive sentiment.

The **AEFI Observatory** figures are authoritatively confirmed through comparison with the analysis performed by **ISFCERT, the Certification Institute for Exhibition Industry Statistics**, recognised by ACCREDIA for the trade fairs certified.

If we compare the trend for the last two editions of 75 international Italian exhibitions (57 annual, 14 two-yearly and 4 three-yearly) - out of the total 94 ISFCERT-certified exhibitions held in 2018 - it is clear that the number of visitors is growing, as are visits (i.e. the number of unique daily entrances), the number of exhibitors and total rented space.

In detail: visitors increased by 3.7% in total, with foreign visitor numbers growing by +12.5%; overall, unique daily entrances increased by 4.0% (Italians +1.9%; foreigners +10.8%). The figures also point to an increase in exhibitors of +2.2% (foreigners up 5.8%). Finally, with regard to overall rented space, the professional exhibitions certified in 2018 were up +4.7%.

**METHODOLOGICAL NOTE:** The analysis is qualitative, in that it shows the trends in the sector according to the responses from the AEFI members who took part in the survey.

**The positive and negative balances are not percentages of absolute values, but differences between the percentages of those who responded indicating improved and worsened situations.**

**AEFI - Associazione Esposizioni e Fiere Italiane**, a private non-profit Association, was established in 1983 with the goal of generating synergies between the most important Italian exhibition districts. AEFI would like to be seen as a privileged partner for operators and institutions alike, and its role is to support members through the development of activities and programmes in the sphere of training, marketing, promotion and research, as well as to provide services for trade fairs through the activities of its Committees: Exhibition Hub Technical Committee, Legal-Administrative Committee, Internationalisation Committee and Trade Fairs Network Committee.

On the internationalization front, AEFI supports members thanks to agreements with strategic markets. To date, partnerships have been agreed with Iran, Taiwan, Lebanon, India, Thailand and South Africa, with AmCham, the American Chamber of Commerce in Italy, with CENTREX, the International Exhibition Statistics Union and with EUPIC-EU Project Innovation Center. A memorandum of understanding has been signed with SACE and SIMEST.

AEFI has promoted the foundation of ISFCert, the Certification Institute for Exhibition Industry Statistics which, through rigorous methodologies, enables Italian organisers to present and recognise standardised data, in the name of transparency and reliability.

AEFI represents Italian trade fairs in UFI - Union of International Fairs. Chaired by Giovanni Laezza, AEFI includes 35 member exhibition districts, which organise over 1,000 events a year over an overall exhibition area of 4.2 million square metres. Nearly all international and national trade fairs which take place each year in Italy are held in AEFI-member exhibition districts.

[www.aefi.it](http://www.aefi.it)

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