The Exhibition System told by protagonists.
What´s new?

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UFI – The Global Association of the Exhibition Industry

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What is UFI?

The world's leading association of trade fair organizers, exhibition centres, professional exhibition associations and exhibition industry partners.

Facts & Figures on UFI

- Founded in 1925 by 20 leading European exhibition companies
- Headquarters in Paris and regional offices in Hong Kong and Kuwait
- UFI´s PIN-Strategy
  - Promote
  - Inform
  - Network

UFI Impact

- ✓ **559 company members** with a presence in **85 countries** (including the 40 largest countries in terms of GDP) and 205 different cities
- ✓ UFI members **Exhibition Centers = 11.5 mn m²**
- ✓ UFI members **Organizers = 3 500 exhibitions per year,** or **34.6 mn m²**
- ✓ **UFI members host and organize 4,500 exhibitions, visited by more than 100 million visitors.**

Trends and developments within the global exhibition industy

2. EXHIBITIONS: Global estimates

The Global Association of the Exhibition Industry

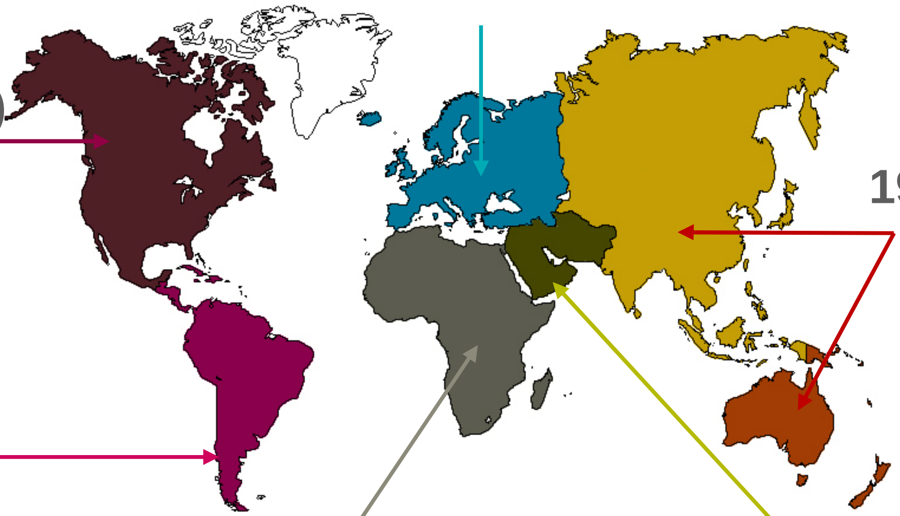
31 400 Exhibitions per year - **109 million net sqm rented**

2.9 million direct exhibiting companies - **260 million visitors**

Regional breakdown

13 700 exhibitions - 53.0 million sqm (49%)
126.3 million visitors – 1.4 million exhibitors

12 500 exhibitions
28.3 million sqm (26%)
67.4 million visitors
750 000 exhibitors



2 770 exhibitions
19.8 million sqm (18%)
47.2 million visitors
520 000 exhibitors

1 200 exhibitions
4.0 million sqm (4%)
9.5 million visitors
110 000 exhibitors

500 exhibitions - 1.0 million sqm (1%)
2.4 million visitors
27 000 exhibitors

700 exhibitions - 2.4 million sqm (2%)
5.7 million visitors
64 000 exhibitors

CURRENT RESULTS:
10 major national markets

	NET SPACE RENTED (Year 2008, in million net sqm)
USA	25,0
China	12,3
Germany	9,3
Italy	6,5
France	5,9
Spain	4,6
Japan	3,3
Russia	3,0
UK	3,0
Brazil	2,5

MAIN GLOBAL RESULTS of the World Map of Venues (2007)

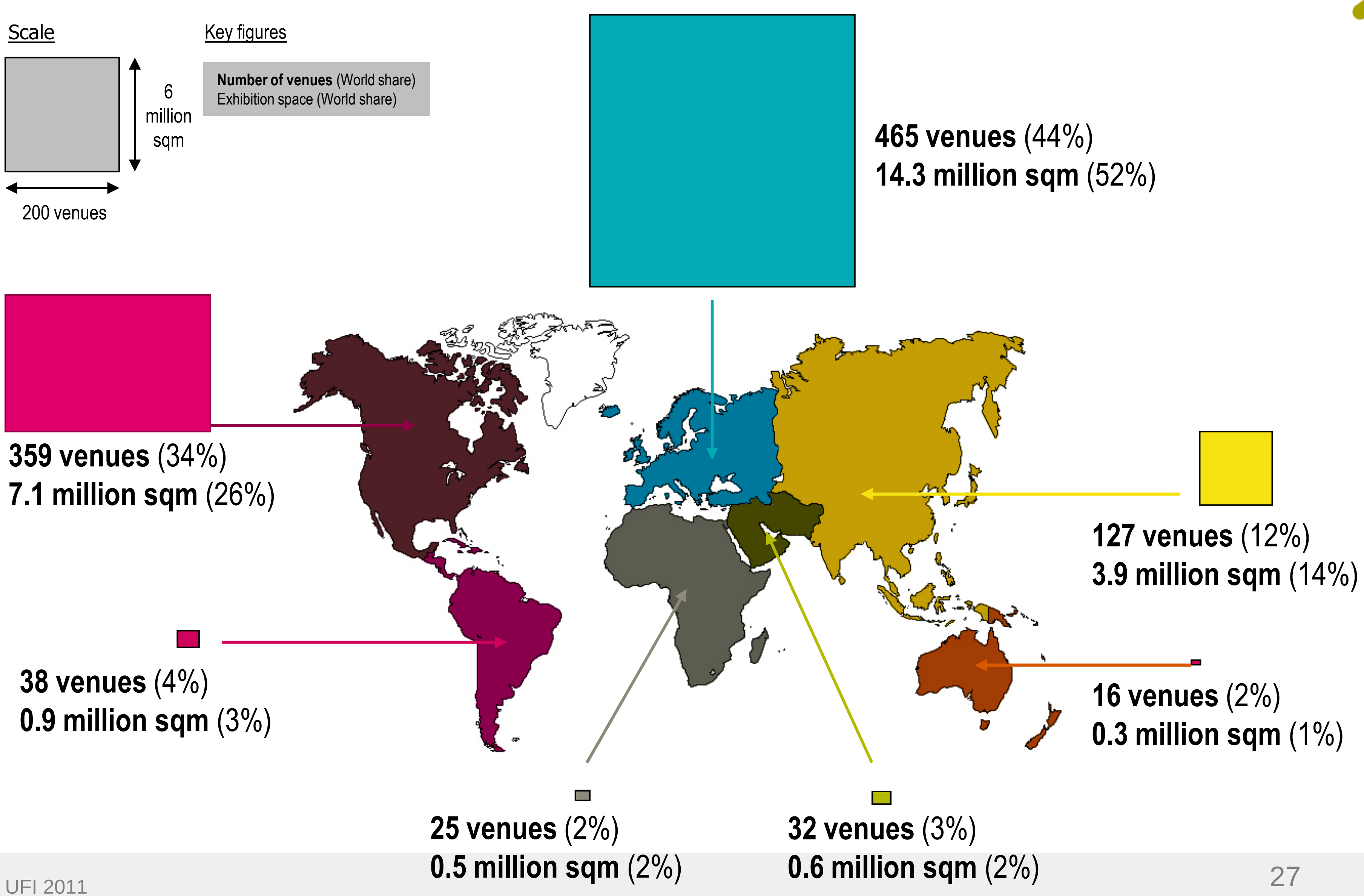
In 2006

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

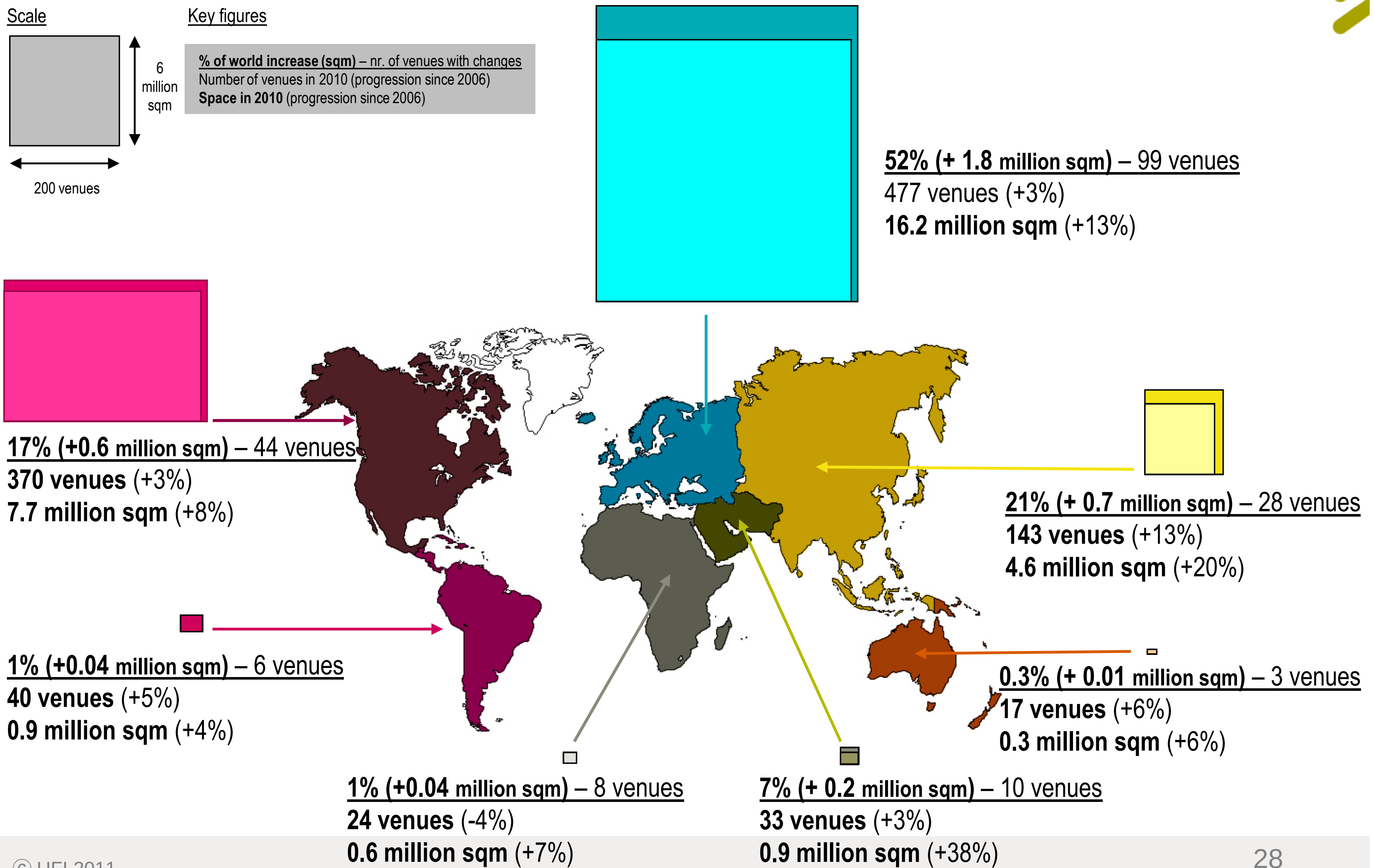
By 2010

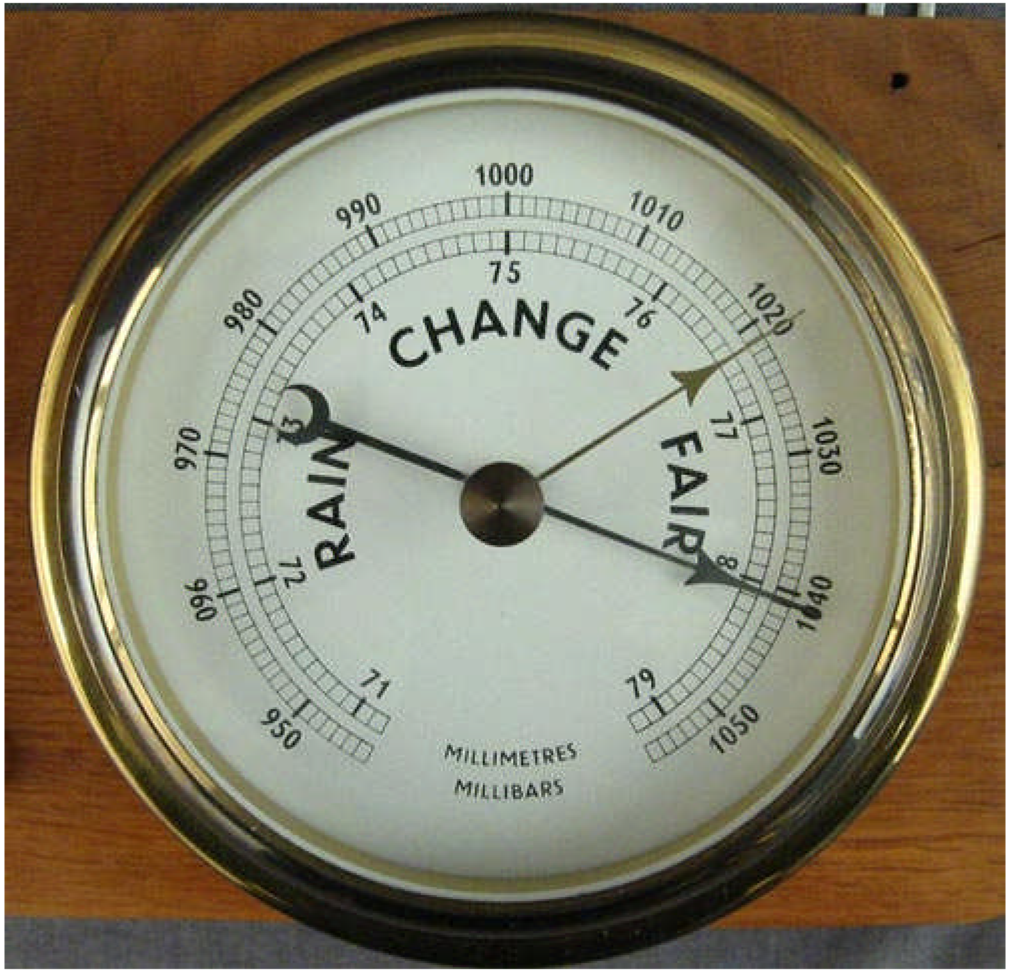
- **1,104 venues**, including:
  14 venues with less than 5,000 sqm in 2006
  30 new venues
  1, closed in 2006, will be reopened
  3, operating in 2006, will be closed
- Total **indoor** exhibition space: **31.1 million sqm (+13%)**

VENUES AND INDOOR EXHIBITION SPACE IN 2006 - Number & Capacity



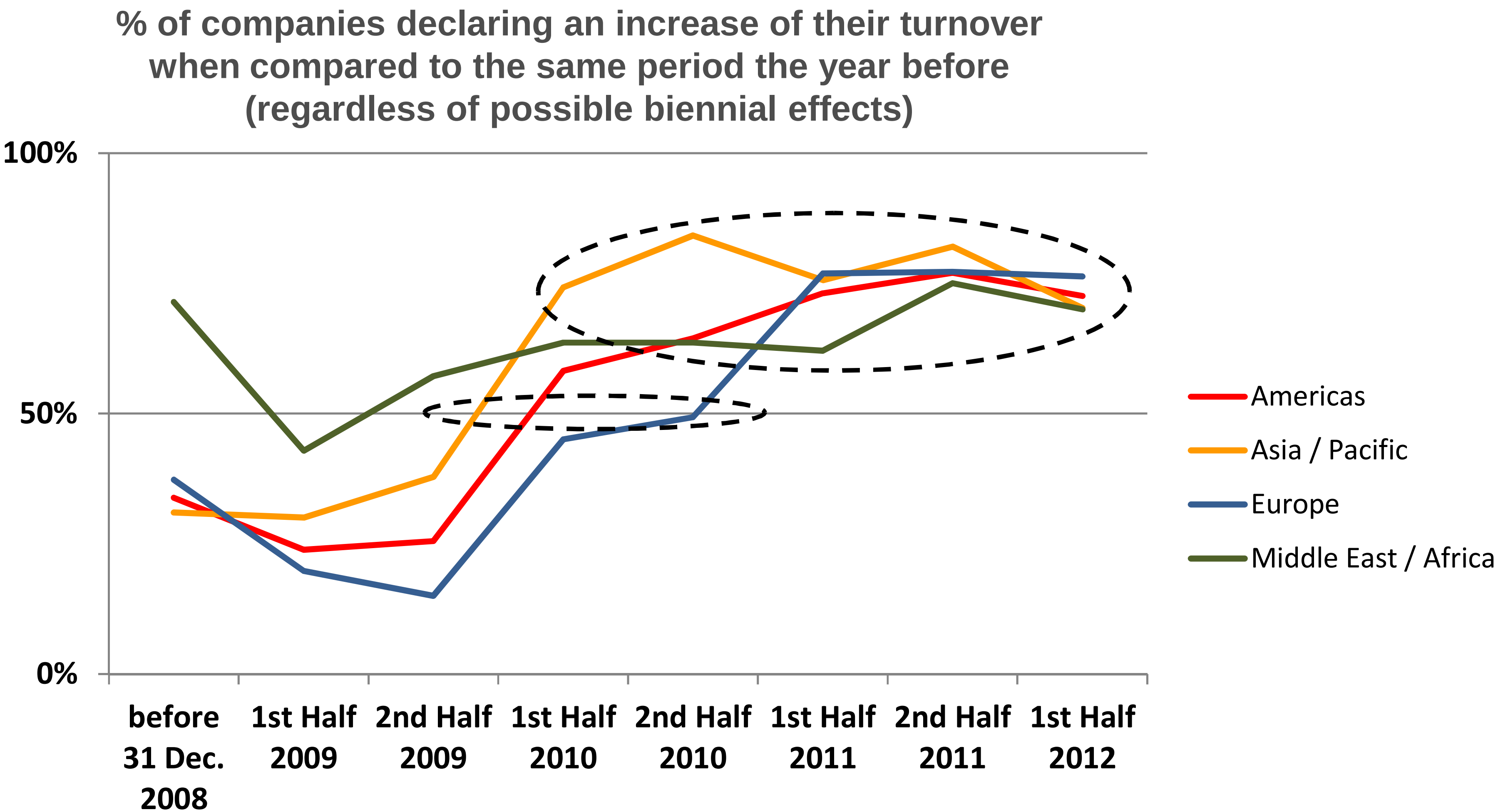
VENUES AND INDOOR EXHIBITION SPACE IN 2010 (and growth since 2006)





UFI exhibition industry barometer

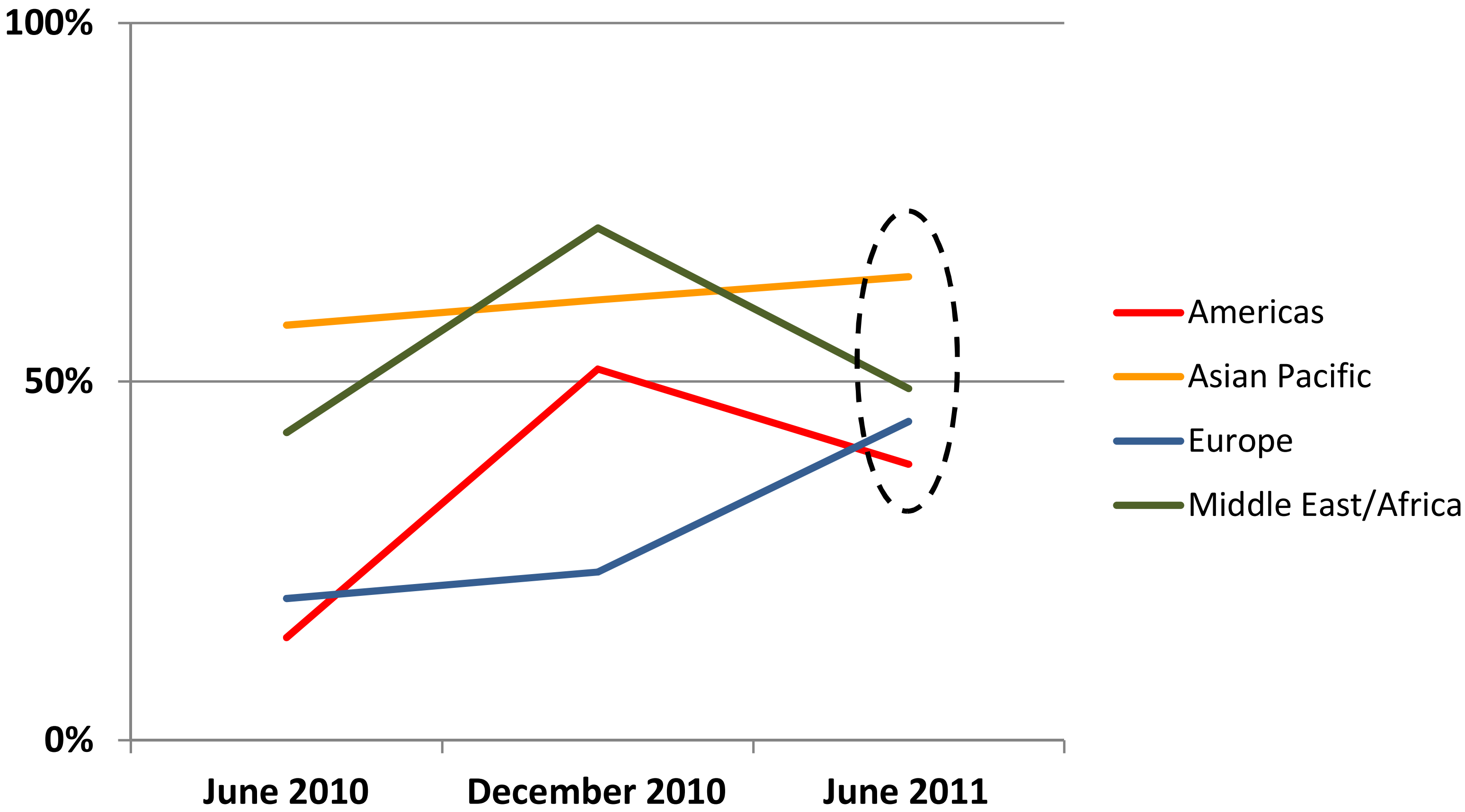
1. Gross Turnover



Confirmation of the return of growth of Gross Turnover for a majority of companies
(since the end of 2009 for AP, early 2010 for AM & end of 2010 for EUR – MEA hardly affected)

3. Perception of the economic crisis

% of companies declaring – in the last 3 surveys - that the impact of the "economic crisis" on their exhibition business is now over

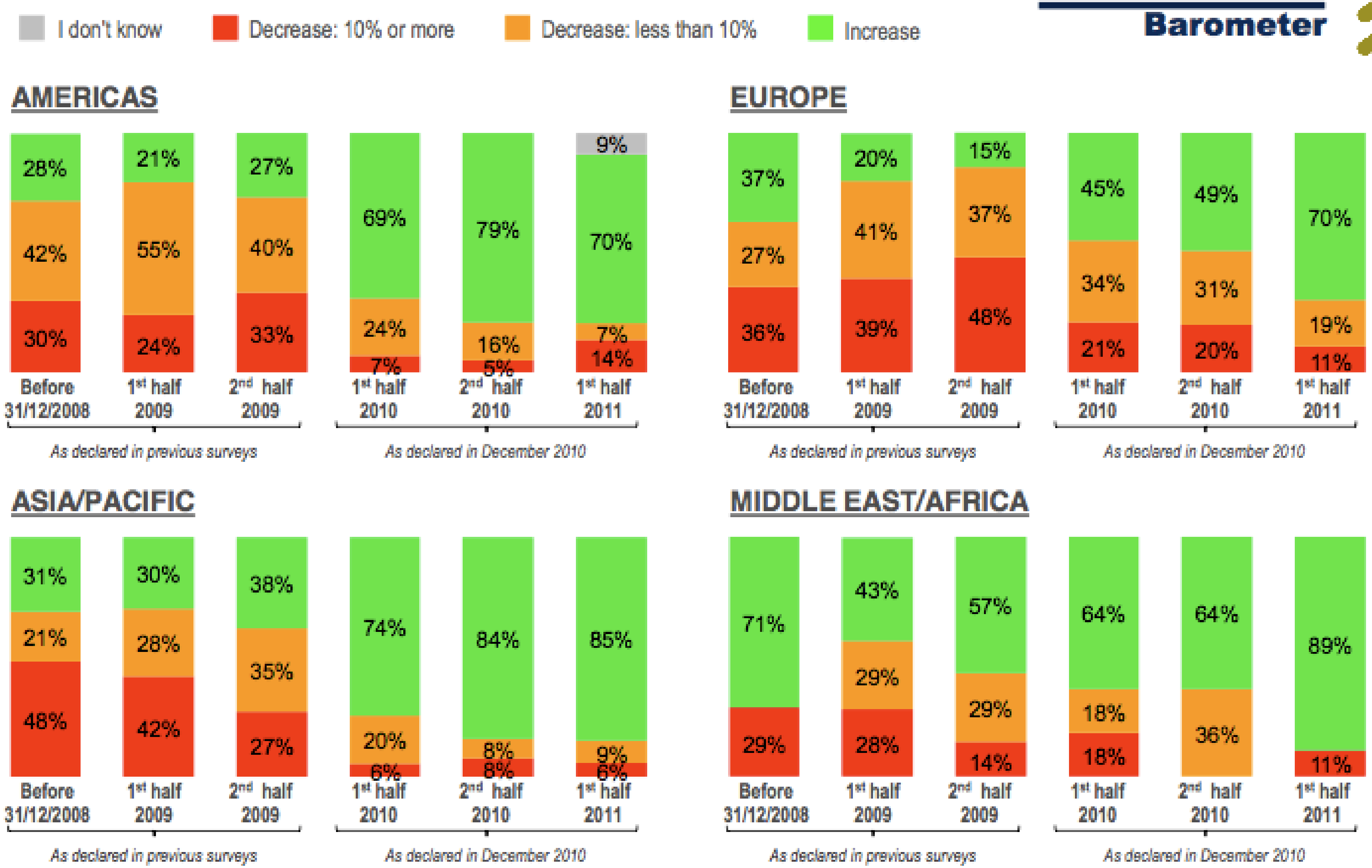


Confidence in the future is still rising in AP (65%). It increases in EUROPE, but there is a "half/half" feeling everywhere except AP.

Note: MEA 49% (71% in Dec. 2010) is a chosen combination of a 29% for RSA and 55% for the rest of MEA.

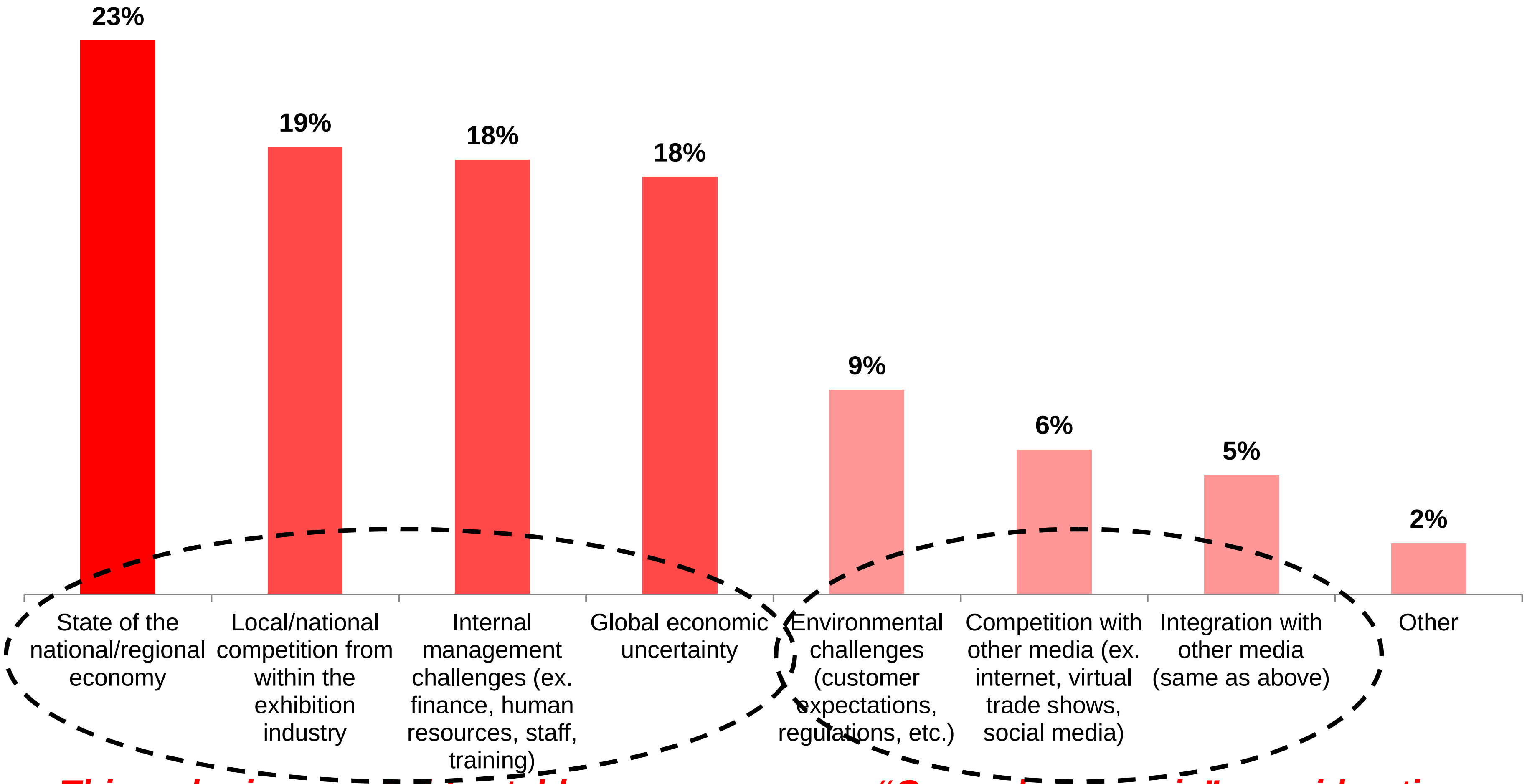
How do you expect your turnover to change when compared to the same period the year before (regardless of possible biennial effects)?

Global Exhibition Barometer



4. Most important business issues

Distribution of all issues selected as the 3 most important ones



This order is remarkably stable across surveys. "General economic" considerations, "local competition" and "internal managements challenges" are at the top of the agenda. Environmental and "other media" issues are not getting much priority…

Areas of change

- Mid-sized national fairs are having difficulties
  - Exhibitors majorly select the biggest international events.
  - Leading shows are prospering.
  - New formats are taking their place.
- IT and other industries where marketing events agencies are strong
  - Own company events are a real-challenge.
  - Non-traditional business events are testing the unimaginative organizer.

Key challenges for exhibitions

- Competition (in some markets) from over-capacity in venues
- Online marketing and product news release
  - Continued uncertainties over balance of internet and face-to-face marketing
  - The industry needs better to communicate how a combination of these is the key to marketing effectiveness.
  - In-house activities and product launches have eaten into traditional events spend.
- Targeting the Facebook generation with real world events.
- Pressures on business travel

New concept had to be developed…

ufi The Global Association of the Exhibition Industry

...a creative relaunch

Thought leadership – a result of the UFI Delphi Study

- “Together with exhibitors, visitors, specialized associations and the media the leading **brand** trade shows can become the place to meet all year long”.
- “But we have to be careful: It is not just content, but valuable content and leadership in new ideas”.
- “The role of trade shows will be changing. Trade shows will more and more act as community integrators, knowledge providers, discussion platforms, social network live grounds, etc.”

From…

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