



## German Trade Fair Industry | Review 2009



## **German Trade Fair Industry | Review 2009**

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Trade Fair Industry

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Outlook



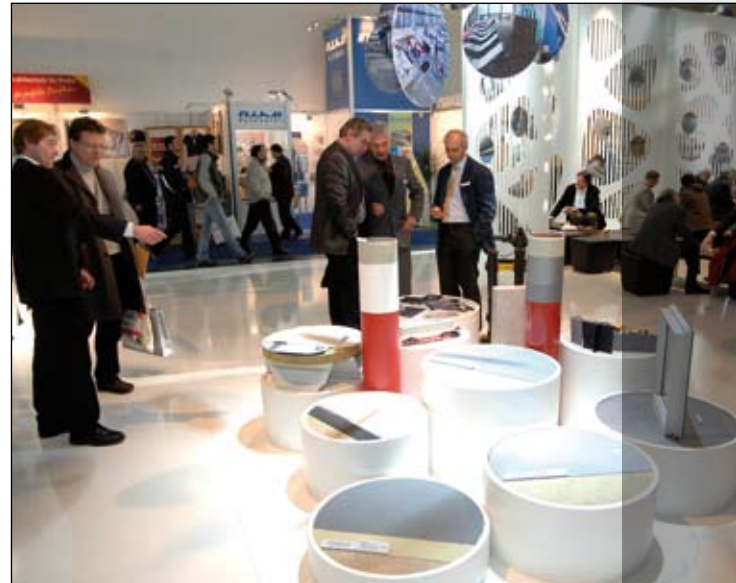


## Outlook

To date the German trade fair industry has survived the economic and financial crisis in reasonably good shape. Once again the exhibiting industry clearly understands that participation in trade fairs leads to long-term benefits and that this marketing instrument must be put to long-term use.

Long-term use also means that the adjustments to use of this instrument are gradual, possibly making them all the more sustainable. For this reason there should be a careful analysis of the current decline in exhibitor and visitor numbers. Certainly, a downturn in trade fair industry figures was to be expected. The question however is whether there will be a substantial recovery in 2010, to be followed by significant growth in industrial turnover. If this recovery does not take place then it may result in a significant delay in trade fair participation rising again. However, it may also be a sign of an overall decline in the use of this marketing instrument.

**Integrating social media** ■ The continuing rise in the amounts the industry invests in online media while their overall communication budgets remain the same may indeed affect the trade fair industry, not necessarily through exhibitors not participating, but by less stand space being rented. Thus the question as to how younger people in particular obtain their information is extremely relevant. If more and more B2B communications initially take place over the internet, e.g. via social media, it is important that trade fair organisers “collect” their customers there and establish trade fairs as centres for genuine communication. This may involve disseminating more information about the categories of exhibitors and visitors expected to attend.





**Trade fairs must become forums for the future** ■ Furthermore, trade fairs must offer more than the status quo in terms of technology and design. They must be the “forums for the future” of their respective industries, and transcend the latest mass-produced product. Comprehensive presentations, offering a vision of a sector’s mid-term future, are currently the exception rather than the rule, but they are what draw the expert’s attention and trigger the senses of both trade visitors and press.



On the whole one can say that B2B communications are gravitating towards B2C communications, and the emphasis is on targeting the senses. The focus here is less on beating the drum, but rather on getting an imaginative message across to the customer that sticks in the mind.

Translated into trade fair terms, it means the task of communicating at trade fairs represents more than drawing attention to visitors by the design of booths.

The focus must also be on invitations, addressing visitors at exhibition grounds, the way staff present themselves on the stand, and communication after the fair, in short exercising all forms of communication, something that in practice is still a long way off.

**Developing standards for sustainability** ■ The question as to whether and to what degree economic processes are sustainable has taken on considerable importance, not only in terms of a responsibility towards society but also as a means of setting oneself apart from competitors. The German trade fair industry took up this point more than 15 years ago and, with the backing of trade fair organisers and the industries involved, agreement was reached that companies taking part in trade fairs would do so in an environmentally friendly way. This avoided individual companies exploiting certain aspects of their eco-friendly



activities to their competitive advantage. This is also AUMA's current aim: for the concept of sustainability to be recognised as one the basics underpinning the entire industry with its highly complex structures, and not simply individual participants or processes.

Sustainability in the trade fair industry comes in many forms: for example exhibition hall construction, trade fair organisation, the flow of traffic generated by a trade fair, energy consumption, stand construction or organisation of supporting events. For this reason, in cooperation with everyone involved in the trade fair industry and in agreement with the Ministry of the Environment, AUMA plans to provide a platform to discuss sustainable concepts for organising trade fairs and for participating at trade fairs.



### **German trade fair organisers maintain their commitment abroad ■**

Despite the global recession German trade fair organisers carried out their programme of trade fairs abroad practically according to plan. Compared with 2008 the number of trade fairs held fell by only 4 %. In view of the number of programme cancellations which organisers from abroad made this was a good result.

On the one hand it shows that in recent years German trade fairs have established standards of quality for their events abroad, making them relatively immune to economic setbacks.



On the other, unlike their competitors German organisers are reaping the benefits of long-term thinking and actions. This year the economies of emerging countries in particular have already shown significant signs of an upturn, and in the mid-term anyone operating on this stage also has good chances of gaining additional market shares.



# Trade fairs in Germany







## Trade fairs in Germany

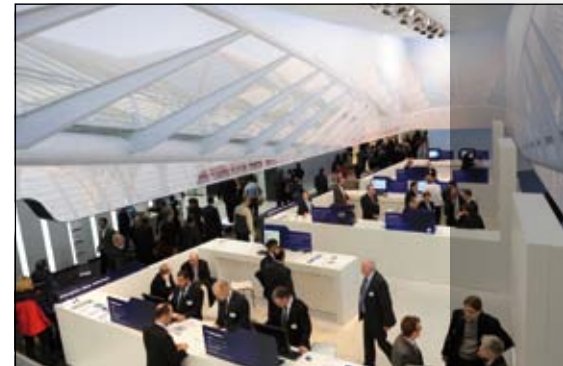
### Overview

The boom years of the trade fair industry in 2007 and 2008 came to an abrupt end in 2009. The recession which began in late 2008 had a delayed, but serious impact on the trade fair industry. The slump in world trade hit international trade fairs in Germany hard.

**2009 review** ■ For the first time since 2004 all the statistics for national and international trade fairs in Germany showed a decline. In comparison with corresponding events in previous years, on average exhibitor attendance at the 135 trade fairs which took place fell by 4.3 %. In 2008 there had still been a 1.9 % rise. It is particularly worth noting that the level of domestic participation prevented even higher losses. This dropped by 3.5 %, whereas exhibitor numbers from abroad fell by 5 %. This is where the slump in world trade left its mark. Faced with a decline in exports many foreign companies, especially from other continents, were already beginning to plan their trade fair attendance more cautiously in autumn 2008.

The amount of rented stand space fell by 6.0 %, exceeding the drop in exhibitor attendance. The exhibitors who continued to take part in trade fairs also spent less, for example on the size of their stands. By taking part, and despite having less to spend on communications, these exhibitors demonstrated good foresight. In times of recession even a small stand fulfils its purpose, thereby showing customers that a company wants to stay in touch and develop joint new strategies in a difficult situation. Those who do not attend forego this opportunity.

Compared with corresponding events in previous years visitor attendance fell by 8.4 %. Individual international consumer exhibitions were affected most, particularly those representing the automotive sector.



However, depending on the sector, trade fairs for capital goods also experienced significant losses. The long-term structural problems of a number of consumer goods shows also left their mark.

Overall, the gap between the results of individual trade fairs continued to widen. Whereas some trade fairs shrank in size by 20 % or more, others grew by the same margin, even in these times of crisis, in particular those representing renewable energies.

### Trade Fairs in Germany 2009



The 135 international / national events in comparison to the respective previous events



A glance at trade fairs by individual category also reveals significant variations. Thus, the 70 trade fairs for capital goods which took place averaged only a 2.1 % loss in exhibitors, and the 1.4 % decline in participation from abroad was better than the statistical average. Across the board the amount of stand space rented out fell by 3.5 %. At 7.9 % the drop in visitor attendance was rather more significant. Faced with uncertainty over the duration of the recession, this was a reflection of companies withholding investment and thus not visiting trade fairs in order to obtain information.

The 39 consumer goods events for trade visitors which took place averaged 7.1 % less exhibitors, with the number of exhibitors from abroad disproportionately in decline (-7.5 %). At -8.1 % there was a significant drop in the amount of stand space, although in this case the recession was only partially to blame. Instead, in some consumer goods sectors changes in purchasing behaviour and trading structures have sparked a trend towards smaller trade fairs. Despite relatively stable consumer demand the decline in visitor attendance at consumer goods trade fairs was quite pronounced (-6.1 %).

The highest drop in visitor attendance was experienced by consumer goods exhibitions for the general public (-9.2 %). In particular, trade fairs for high-quality, durable products such as cars or boats were affected. The amount of stand space at the 19 trade fairs in this category fell significantly, while exhibitor numbers remained relatively stable (-4.5 %). At the seven service-oriented trade fairs which took place exhibitor attendance fell by close to 5 %, due almost entirely to lower numbers



from abroad, particularly in the tourism sector. The amount of stand space went down accordingly, by about 4 %. Visitor numbers fell even more sharply (-9 %). Once again, the impact was felt mainly in the tourism sector.

The 135 international trade fairs which took place in 2009 were attended by 154,155 exhibitors, of whom 72,285 came from Germany and 81,870 from abroad. These companies rented stand space covering 5,781,738 m<sup>2</sup>. 8,916,693 visitors attended these events. Furthermore, the 151 regional events and highly specialised smaller trade fairs for which AUMA keeps records reported a figure of 47,470 exhibitors who rented 1,339,499 m<sup>2</sup> of stand space. Visitor attendance here was 5,754,925. Thus, statistics for the 286 AUMA-registered events were as follows: 202,000 exhibitors, 14.7 million visitors and 7.1 million m<sup>2</sup> of rented space.

Compared with 2008, German trade fair organisers' turnover fell considerably in 2009, from EUR 2.9 billion to around EUR 2.5 billion. However, these figures cannot be attributed entirely to a badly performing economy. Over 50 % of this decline was the result of significantly less trade fairs taking place in 2009. The trade fair calendar in 2010 is similar to 2008, so that regardless of how well the economy fares turnover will once again rise sharply.

In 2009 the downturn in the trade fair industry was by no means confined to Germany. On the contrary, numerous countries ranging from the US, Spain to Russia and the United Arab Emirates experienced a much greater decline. Thus in relative terms German trade fairs have gained ground. However, this advantage will only have a long-term impact if in the short term participation from abroad returns to its previous levels. If this can be accomplished then German trade fairs will be able to emerge from the recession in better shape than before.

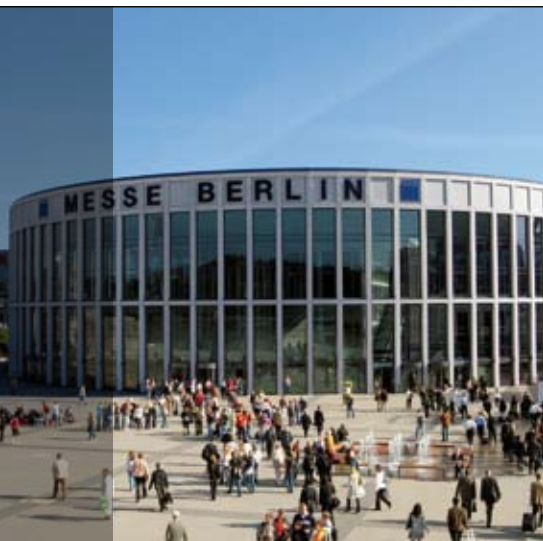
**Trade Fairs in Germany 2009**



**The 135 international / national events in comparison to the respective previous events**

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	135	-4.3%	-3.5%	-5.0%	-8.4%	-6.0%
Investment goods trade fairs	70	-2.1%	-2.7%	-1.4%	-7.9%	-3.5%
Consumer goods fairs directed to trade visitors	39	-7.1%	-6.1%	-7.5%	-6.1%	-8.1%
Consumer goods fairs directed to the public	19	-4.5%	-3.3%	-6.5%	-9.2%	-9.5%
Trade fairs presenting services	7	-4.9%	-0.5%	-7.2%	-9.0%	-3.9%





*Messe Berlin*

Not least against the backdrop of global recession there is an ongoing discussion as to how both the leading international trade fairs and second-tier national trade fairs in Germany will develop. In general one can say that even some of the leading trade fairs suffered a decline in exhibitor and visitor attendance, and that some of the second-tier events fared comparatively well. Any arguments maintaining that although these secondary trade fairs fulfil a function they will indeed decline may well be premature. In order for these trade fairs to achieve long-term success they must clearly focus on certain audiences which do not simply mirror those of a leading industry event. Trade fairs which target individual industries, regions and audiences will have a future in this market, regardless of their size.

Some years ago, several publishers of magazines targeting the general public entered the German trade fair market. They met with varying degrees of success. A number of consumer exhibitions were founded. However, after taking place once or twice a number of exhibitions were then cancelled, either because the venue or other conditions were unfavourable. As a result, efforts were made to set up joint ventures with established organisers and their trade fairs, doubtless the right move in order to focus the qualities of both parties.

**Forecast for 2010** ■ During the first months of 2010 the figures for international trade fairs have remained relatively stable. Except in individual cases there has been no further marked decline in exhibitor and visitor attendance. Some trade fairs have already recovered from the losses they experienced the year before. However, long-term growth is not yet in sight and the outlook for the remainder of 2010 appears to be the same. The most likely outcome is that all figures will be in the 0 to -2 % frame. Average exhibitor and visitor numbers are unlikely to grow before 2011.

The overall results for 2010 will definitely be a significant improvement on 2009, simply because many more trade fairs are scheduled to take place in 2010. AUMA expects over 170,000 exhibitors and 9.9 million visitors to attend the 157 events taking place this year, and rented stand space to reach 6.9 million m<sup>2</sup>.



## AUMA\_MesseTrend 2010

German exhibitors are cautiously optimistic about their trade fair plans for the next two years. In 2010/2011 20 % of companies intend to take part in more trade fairs than in 2008/2009. 20 % also intend to take part in less.

Exhibitors clearly recognise that if they want to encourage business growth there is no point in reducing face-to-face communication. These are the results of a representative survey commissioned by AUMA and carried out by TNS Emnid, which polled 500 German companies who exhibit at fairs which mainly target trade visitors.

Overall, in 2010/2011 companies intend to attend an average of 5.5 domestic trade fairs, only marginally less than in 2008/2009 (5.7). By contrast, German exhibitors plan to take part in less trade fairs abroad. Over the next two years 14 % of the companies polled intend to take part in more trade fairs, 18 % in less. During the same period the average number of trade fairs they aim to take part in will fall from 3.2 to 2.8. Only a year ago they had planned to take part in more trade fairs. The decline in exports has clearly left its mark.

Over the next two years 14 % of the companies plan to spend a total of EUR 345,000 on taking part in trade fairs, the same amount that was actually spent in 2008/2009. But the amount they had said they would spend fell considerably within the space of a year. In the last survey companies had planned to spend EUR 386,000 in 2009/2010, and when the financial crisis turned into an economic crisis these budgets were promptly reduced.

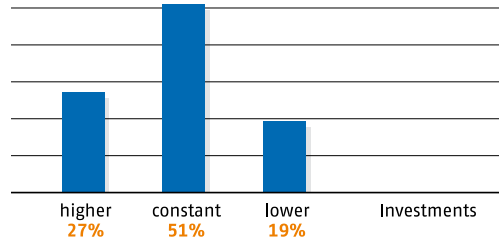
Clearly the worst of the recession is over and we are now looking towards the future. 27 % of the exhibitors polled intend to spend more on trade fairs and only 19 % on less. Smaller companies in particular aim to invest more in trade fairs.



## AUMA\_MesseTrend 2010

### Investments in participations

Compared to 2008/2009, ...% of German exhibition companies\* are planning worldwide in the period 2010/2011:



Trade fair budget per company: 2008 + 2009: 345,200,- €  
2010 + 2011: 345,700,- € **+ 0.1%**

\* representative survey conducted by TNS Emnid commissioned by AUMA among 500 companies, which exhibit at trade visitor-oriented fairs; October 2009; to 100 remaining percent: n.a.

Trade fairs continue to be a highly rated communication instrument. 83 % of the exhibitors consider trade fairs to be important or very important (previously 81 %), with only the companies' own websites rated even higher (90 %). Sales force activities rank next (76 %), followed by direct mailshots (57 %), both of these gaining slightly in importance. Instruments with a less direct influence on business, such as events and sponsorship, have fallen back in the rankings. The share of the trade fair budget spent by B2B exhibitors on communications has risen marginally yet again, reaching 43 %.

From the exhibitors' point of view the mid-term prospects for trade fairs as a marketing instrument have hardly suffered. 68 % of the exhibitors polled see trade fairs being just as important in five years, 14 % think their importance will increase, and 16 % think it will decline.

## Share of EU exhibitors rises

In 2009, due to the global recession, the focus of exhibitor attendance at German trade fair venues shifted towards the EU. In some cases there was a double-digit decline in exhibitors from Eastern Asia, and from Russia as well.

In 2009 participation by exhibitors from larger EU countries contributed to relatively stable trade fair business. Exhibitor numbers from the EU fell by only 2 %. By contrast, compared with corresponding events in previous years, in 2009 the average overall attendance from abroad fell by 5 %. Exhibitor numbers from Italy, the UK and the Netherlands remained relatively stable, while there was actually a slight increase in participation from France. However, there were 7 % less exhibitors from Spain, 16 % less from Greece, clearly reflecting the deep impact of the financial and economic crisis there. Exhibitor numbers from Poland and the Czech Republic, the two most important EU countries in the east, remained practically the same. Measured against overall



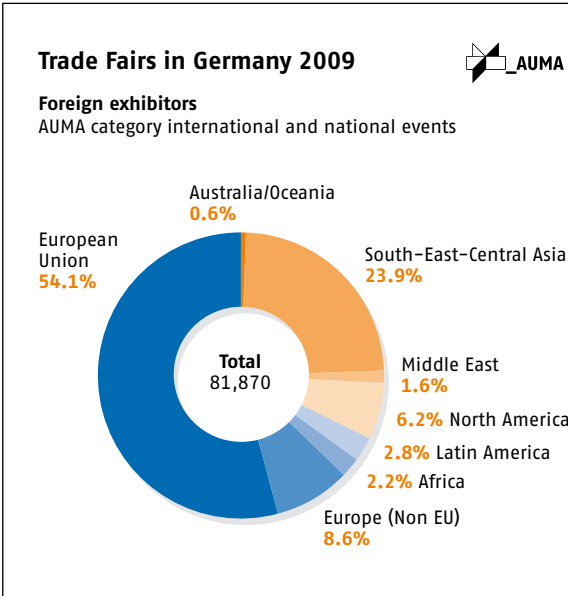
participation by exhibitors from abroad and compared with corresponding events in previous years, the percentage of exhibitors from the EU rose from 53.4 % to the current figure of 54.1 %.

Among non-EU countries in Europe the picture was very diverse. The number of exhibitors from Russia fell to only 700, a drop of 38 %, with numbers from Ukraine falling by almost 20 %. However, despite the recession there was a significant increase in participation from some Balkan countries. In these cases numbers at earlier events were already low. Exhibitor numbers from Bosnia and Herzegovina more than doubled, reaching 32. There was also a substantial rise in numbers from Croatia and Serbia.

On average exhibitor numbers from the Middle East remained practically the same. Israel's presence was the largest and its 473 exhibitors attended 78 trade fairs. It was followed by the United Arab Emirates, whose 300 exhibitors represented only a 5 % drop in attendance.

Compared with corresponding events in previous years, overall participation from the countries of Southern, Eastern and Central Asia was down by about 5 %. There were 4 % less exhibitors from China, 19 % less from Hong Kong even, and 12 % less from Taiwan. Compared with 2009 events, there were 13 % less exhibitors from Japan, 8 % less from Thailand and 14 % less from Malaysia. By contrast, participation from India, Pakistan and Vietnam rose slightly. Exhibitor numbers from countries in Central Asia rose virtually throughout, for example from Kazakhstan, Armenia and Afghanistan. In this region the highest participation was from Georgia (80 exhibitors).

There were 4 % less exhibitors from the USA, whereas there was a slight increase in participation from Canada. Exhibitor numbers from South America rose marginally to almost 2,300. Compared with corresponding events in previous years, there was a moderate drop in participation from Brazil and Argentina, and a slight rise in numbers from Mexico, Colombia and Ecuador.





Exhibitor numbers from African countries rose by 6 %. Figures for countries with large numbers of exhibitors such as Egypt and South Africa remained stable. Numbers from Morocco, Tunisia, Tanzania and Kenya rose by 5 to 10 %.

Exhibitor numbers from Australia fell by 10 %, whereas participation from New Zealand fell only slightly. Companies from Australia attended 62 trade fairs in Germany.

As in recent years, the country with the largest number of exhibitors at international trade fairs in Germany was Italy (10,977 companies), which gained even more ground on second-placed China (7,888, excluding Hong Kong). Next in the rankings were France (5,033), the UK (4,570), the Netherlands (4,453), the USA (4,380) and Spain (3,918). Combined, they represented more than half of all the exhibitors

from abroad. Some more nations were represented by at least 2,000 exhibitors: Austria (3,337), Switzerland (3,108), Taiwan (2,540), India (2,472), Belgium (2,179) and Turkey (2,000).

The country which took part in more trade fairs than any other was Austria, which was represented at 132 out of 135 trade fairs, ahead of Switzerland (130), the Netherlands (129), Italy (128), France and the UK (126 each).



## Trade fairs in Germany in 2009: two million visitors from abroad

In 2009, the share of international visitors which German trade fairs could attract remained practically the same – despite the global recession and a decline in export trade.

On average, attendance by foreign visitors stood at almost 23 %. At 23.6 % and 25 % respectively, only the boom years of 2007 and 2008 had previously recorded better results. These are the findings of a survey which has now been completed, carried out by the Association of the German Trade Fair Industry (AUMA).

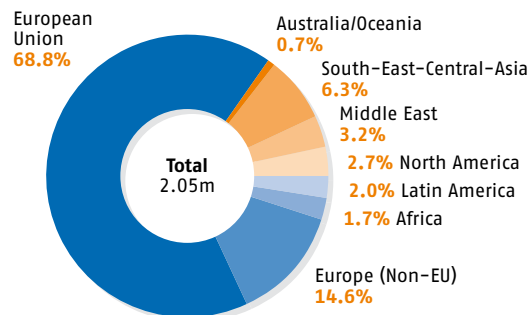
Last year a total of 2.05 million foreign visitors came to Germany, in search of information and to negotiate business at international trade fairs. However, there was a shift towards higher participation from European countries. Thus, 83 % of the visitors were from Europe. In 2008 they had made up 80 %. Probably the main reason for this was temporary cuts aimed at saving costs, particularly those incurred by long-distance trips.

About 1.4 million visitors came from EU member states, 300,000 from European countries which are not part of the EU. The non-European region with the highest number of visitors was Southern, Eastern and Central Asia (130,000), followed by the Middle East (65,000), which for the first time was ranked well ahead of North America (45,000). 40,000 visitors came from South America, 35,000 from Africa, and close to 15,000 from Australia and Oceania.

### Trade Fairs in Germany 2009

#### Foreign visitors

AUMA category international and national events





The non-European country with the highest number of visitors was the USA (45,000), followed by China (30,000) and India (25,000). Among European countries the Netherlands led the visitor rankings with 225,000 visitors, followed by Italy and Austria (140,000 respectively), Switzerland and Belgium (115,000 each), and France (105,000). It should be noted that a substantial part of visitors from neighbouring countries were members of the general public, whereas audiences from abroad consisted almost entirely of trade visitors.

The following places were occupied by the United Kingdom (95,000), Spain (75,000), Poland (65,000), Denmark (55,000), the Czech Republic (45,000), Russia, Turkey, Greece and Sweden (45,000 each).





## No plans to increase hall space

In early 2010 there were 2,757,440 m<sup>2</sup> of hall space at German trade fair venues hosting fairs of international or national importance, 41,700 m<sup>2</sup> (1.3 %) more than on 1 January 2009.

The amount of additional hall space currently being built is relatively small. A year earlier there was actually a slight decrease in the amount of hall space. In 2009 overall investment was down, as it was in 2008. Around EUR 180 million were invested in venues hosting international or national trade fairs, a year-on-year drop of 18 %.

Any money spent was mainly used to redress a previous shortage of hall space. Following the decisions reached by the supervisory bodies, a total of approximately EUR 330 million are due to be invested between 2010 and 2015, in particular in the refurbishment and modernisation of existing space. Currently, no decisions have been taken to increase hall space at trade fair venues of international or national importance.



*Westfalenhallen Dortmund*

## Regional and specialised events

In view of the extent of the economic crisis the figures for regional and highly specialised trade fairs remained relatively stable. One possible reason is that in 2009 many of the more domestically oriented industries such as the skilled trades fared better than sectors focused on export.

A total of 151 regional and specialised trade fairs and exhibitions took place in 2009, which on average reported 1.7 % less visitors compared with corresponding events in previous years (2008: -2.4 %). The number of exhibitors fell by 2.6 % (2008: -2.3 %). Thus exhibitor numbers at these trade fairs remained relatively stable. As was to be





*Messe Düsseldorf*

expected following the industry's widespread cost-cutting the amount of space rented out fell by 4.4 % (2008: -1.6 %). Thus compared with international trade fairs this segment of the market fared better.

In 2009, a total of 47,470 exhibitors took part in regional and specialised trade fairs, occupying stand space totalling 1,339,499 m<sup>2</sup>. The organisers reported 5,754,925 visitors. The statistics included trade fairs and exhibitions listed by AUMA in the regional and specialised event category, which were held by organisers belonging to AUMA. This category may also include events held by other organisers, providing they comply with certain requirements. As of 2010 regional and specialised trade fairs will be listed in separate categories. The AUMA online database and the AUMA Trade Fair Guide for Germany already lists them as such.

Looking at the various types of exhibition, the figures for consumer goods events for the general public remained relatively stable, particularly when considering the decline in recent years at a time when the economy was in quite good shape. On average exhibitor numbers at the 35 events which took place fell by 2.7 % (2008: -5.6 %) and the amount of space rented out dropped by 3.5 % (2008: -6.2 %). At -0.2 % visitor attendance remained practically the same, following a 5.8 % drop the previous year. Clearly new event concepts and intense marketing efforts over recent years have reaped success.

Figures for the 61 consumer events for special sectors like leisure, food, building and travel also remained relatively stable. Visitor attendance fell slightly by 2.6 % (2008: -1.0 %), exhibitor numbers by 1.8 %, while the amount of space rented out dropped by 4.9 % (2008: +0.4 %). In particular there were less large-scale stands, generally common at events of this type.



The recession had a more negative effect on events for trade visitors than on consumer exhibitions. Across the board figures were down by approximately 5 %, exhibitor numbers by 4.1 %, and both the amount of rented space and visitor attendance fell by 5.3 %. Nevertheless this sector fared better than the many international trade fairs which focus on export trade.

## Voluntary auditing of trade fair statistics

In late 2009 FKM, the Society for Voluntary Control of Fair and Exhibition Statistics, made some important decisions for the future and agreed on new, simplified set of rules. Furthermore, in future auditing by FKM is to constitute certification.

The new regulations will come into force by 1 January 2012 at the latest. They have been restructured and streamlined. The methods for calculating exhibitor, space and visitor statistics have become more clearly defined and comply with international standards. Furthermore, future monitoring carried out by the auditors Ernst & Young will constitute certification. Details will be worked out by FKM in the course of 2010.

In 2009 German organisers had auditing carried out on the exhibitor, space and visitor statistics of 236 trade fairs and exhibitions. A total of 67 German trade fair organisers are now members of FKM. Four new members were added in late 2009 and spring of 2010, three trade fair companies are no longer members. There was a decline in the number of foreign trade fairs audited by FKM, due to the situation in the trade fair industry in Russia. The three guest members from abroad, the Verona Trade Fair Company, the Hong Kong Trade Development Council and the Moscow trade fair company MVK, had 19 trade fairs audited.

Essentially, every FKM audit takes basic data on exhibitors who have their own stands, rented stand space and visitor attendance into account, in each case differentiating data according to domestic and foreign origin.



*FKM's annual review contains audited exhibitor, space and visitor statistics, plus visitor breakdowns; and is published annually in June*

For exhibitors taking part in trade fairs FKM's visitor structure analyses are even more important than the basic data, as they make it possible to pinpoint the groups they can specifically target at these events. Standard surveys for trade visitors and the general public are available at close to three-quarters of the events audited. These provide information on visitors' origins, branches of industry, influence on decisions and the duration of their attendance.

For businesses exhibiting at trade fairs these analyses are an important instrument for planning their participation, and a means of monitoring success. Visitor surveys provide criteria for selecting trade fairs over other marketing instruments.

**Transparency of trade fairs worldwide** ■ In collaboration with other European auditing companies FKM has published the brochure entitled Euro Fair Statistics, which contains audited statistics of close to 2,200 events held in 2008. The following 20 countries participated: Austria, Croatia, the Czech Republic, Denmark, Finland, France, Germany, Hungary, Italy, Moldova, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Spain, Sweden and Ukraine.

This is the first time this brochure, which is available only as a PDF file, has been compiled by the UFI – The Global Association of the Exhibition Industry. The task was previously undertaken by FKM.

For more information ► [www.fkm.de](http://www.fkm.de)



## Marginal decline in congress business among AUMA members

In 2009, mainly as a result of the recession, business in supporting events at trade fair venues declined slightly.

There were close to 6,000 B2B events accompanying trade fairs, 13 % less than in 2008. Participant numbers fell accordingly. At close to 600,000 the figure was about 5 % less than the previous year, due most probably to the poor economy and the relatively low number of trade fairs scheduled in 2009. There was a slight decline in the number of independent B2B events. However, visitor attendance rose to over 1.6 million, an increase of around 14 %, mainly due to congress business taking place in cycles.

In 2010 the congress divisions at trade fair venues expect business in B2B events to mainly remain either steady or to marginally increase. No-one expects a significant decline in B2B business in 2010.

However, to a large extent congress hall space at trade fair venues is also used for other purposes, such as cultural, society, political and sporting events. In 2009 they numbered more than 1,500. Visitor numbers rose from 4.1 million in 2008 to over 6.5 million in 2009, due in particular to certain arenas holding special events.

Most congress departments at the trade fair venues do not confine their business operations to renting out space. Almost all of them also organise special events, technical services and catering, half of them offer a registration service for participants. In general, providing this service for congress delegates has become the norm.



Around three-quarters of the companies operating congress centres at trade venues assist with hotel arrangements. Demand for this service remains stable. The organisers of congresses and other events obviously put less emphasis on contracting work to their own service providers, relying increasingly instead on offers of services tailored for the individual congress center.

## Stand construction sector – gradually the dark clouds are lifting ...

... for those stand construction companies and event agencies who are members of the Association for Direct Business Communication (FAMAB). In 2009 business in this sector was subdued. In Germany there were less trade fairs at international level than usual and hardly any major sporting events to stimulate business. Additionally, the economic situation caused uncertainty among major customers. All in all, companies invested less in direct and personal communications, yet another reason for FAMAB to focus on sustainable concepts.



By their very nature, trade fair participation, marketing events, brand presentations and live communication are sustainable. They have a long-term impact on their respective audiences, provide opportunities to convey a message and are practically without equal as far as promoting one's image and improving sales are concerned. These were the benefits customers needed to be convinced of whenever they reflected on what to do with the limited communications budgets at their disposal. One of the mainstays of the sustainability offensive was a quality charter which service providers in the stand construction, marketing event and trade fair design sectors have set out over the last 24 months.

2009 ADAM award winners:  
*Resopal, interzum, Köln*





The charter contains guidelines which show customers how direct business communications can be the driving force behind a company's success. However, these are all practical solutions. What is currently missing is scientific proof of the long-term effect of communications. For this reason FAMAB is in talks with several universities and the aim is to solve this problem through research projects.

However, the focus of the association and its members is also on sustainability with regard to ecology, the economy and social responsibility. A number of companies have succeeded in proving their expertise in handling every available resource by compiling sustainability reports.

But all these outstanding efforts cannot disguise the difficult economic situation. Thus, as expected, the situation in 2009 was less than good. This was clearly due to the recession. Because most stand construction companies are hardly affected by years in which fewer trade fairs take place, as the majority have diversified their business portfolio. Through involvement in other direct business communications they are normally capable of balancing the deficit.

As a result of the recession it is estimated that overall turnover of companies in 2009 was down by around EUR 1.8 billion, close to a double-digit decline, although this varied depending on which part of the sector companies worked in and on their customers' marketing behaviour.

It is estimated that companies in this sector carried out around 57,000 projects at trade fairs, a decline of 5.2 %. Clearly companies exhibiting at trade fairs saved on stand construction, for example by repeating the same trade fair concepts. They also reduced the size of their stands in order to save costs. In 2009 this resulted in stand construction covering an area of only 5.8 million m<sup>2</sup> at international trade fairs in Germany, close to 6 % less than at corresponding events in previous years.



*Messe Essen*



*2009 ADAM award winners:  
Mercedes-Benz, IAA – utility  
vehicles, Hannover*

Companies spent less money on taking part in trade fairs abroad than on events at home, so that FAMAB members were able to realise more projects in Germany (84 % versus 79 % in 2008). As expected, contracts completed abroad made up 16.3 % of turnover, as opposed to 19 % in 2008.

**Expectations for 2010** ■ Expectations for 2010 can be described as mixed. More trade fairs will be taking place in Germany in 2010, offering better prospects for the stand construction sector. However, only companies active in special sectors of the market will benefit. For example “K”, the plastics trade fair, only provides work for companies whose customers deal in plastics processing.



# Lobbying and legal aspects







## Lobbying and legal aspects

### Product piracy and brand theft at trade fairs

Trade fairs offer every visitor an opportunity to compare the products and services of various exhibitors and to gain an overview of the market. They help to make the market more transparent. However, these events are frequently where those who copy and fake others' products are to be found.

10 years ago, AUMA and its members began drawing attention to product piracy, supporting forceful steps to combat those responsible. German trade fair companies continue their fight against brand theft and product piracy. Their awareness campaign has been worthwhile. While the problem still exists at trade fair venues in Germany, counter measures have improved and situations are resolved quickly and in some cases without legal enforcement. AUMA's information sheets on fake products at trade fairs both in Germany and abroad, which are published on its website, are still valid and are frequently read. The associations representing exhibitors at trade fairs can also offer advice.

For more information ► [www.auma.de](http://www.auma.de)  
English / Downloads & Publications /  
Legal advice & definitions





*Hamburg Messe*

## Energy industry law

During the negotiations on the third package of internal market energy laws the European Parliament proposed an exemption for so-called industrial sites, comparable to the German regulations governing site networks.

The regulations governing site networks exempted trade fair companies from the majority of obligations stipulated by the German energy industry law. However, the European Commission rejected the proposal as being too far-reaching. Consequently, AUMA has pressed the issue both at European level and with the Federal Ministry of Economics, in the hope of agreeing a broad exemption for companies whose energy supplies to third parties represent only a by-product, as with trade fair companies for example. Following talks with the Federal Ministry of Economics and Technology AUMA was given reassurances that the wide scope that EU law offers regarding implementation of the package of internal market energy laws where site networks are concerned will be exploited to the full to minimise the bureaucratic burden on site network operators.

## Unofficial exhibitor directories

In 2009, a company based in Mexico by the name of "Commercial Online Manuals" or "Expo Guide" once again dominated the headlines. At various trade fairs they continued to request exhibitors to check the validity of their company information for inclusion in the "Expo Guide" and to complete or update it using an enclosed application form.

However, this is an expensive internet-based directory service. The small print in the application form states that a directory entry over a period of three years costs an annual fee of EUR 1,181.

Several exhibitors concerned have contacted AUMA for advice on what steps to take. On its website, under Downloads & Publications / Legal advice & definitions, AUMA has drawn up a form addressed to Expo

*Messe Hannover*

Guide which exhibitors concerned can, as a precautionary measure, use to renounce and call into question any mistakenly given declaration to have their names listed. AUMA's advice not to pay any invoices received from such companies has proved correct. In the meantime this company from Mexico has engaged a debt collecting agency in Cyprus to put pressure on customers unwilling to pay.

## **AUMA supports sustainability in the trade fair industry**

Following the failure of the Copenhagen climate summit, private industry around the world has made efforts to set a good example and forge ahead without government support, in an effort to coordinate and document the sustainability of their own economic activities.

In the meantime the Global Association of the Exhibition Industry (UFI) has tabled the issue and set up a sustainability commission. AUMA attended the focus meeting in Munich in April 2009 and presented the current efforts of trade fair venues in Germany to estab-





lish basic rules on sustainability. The brochure on environmental topics published by AUMA in 1994 continues to promote a high standard for trade fairs and exhibitions in Germany, so that trade fair venues in Germany can confidently enter into the discussion on sustainability at international level as well.

Efforts by the International Organization for Standardization (ISO) to develop a standard for voluntary certification of sustainable events have led to intense discussions within various working committees and among those concerned. Two years have been timetabled to prepare the ISO standard. AUMA is on the international ISO committee and on the DIN working committee of the German Standards Institute (DIN).

At European level the issue of sustainability is dealt with by the EMAS III Regulation which has also introduced an eco-management scheme. In Germany the regulation is implemented by the eco-management audit law (UAG), providing that the organisations which voluntarily take part are monitored by state-certified auditors. Sustainability has also become an issue at government level. The Parliamentary Committee on Sustainable Development will discuss the German government's sustainability concepts.



## Round Table in Brussels

In late January the tenth AUMA Round Table took place at the DIHK in Brussels, attended by the representatives of German trade fair companies responsible for EU matters. Among the items was a paper by Counsellor Elfried Bierbrauer, responsible for trade policies, transatlantic relations and South American affairs at the Permanent Representation of the Federal Republic of Germany in Brussels.

In particular she talked about the latest developments regarding the free trade agreement with South Korea, which was drawn up in October 2009. A number of obstacles still remain before it comes into force. She also stressed that various other bilateral free trade agreements are being negotiated. Besides Ms. Bierbrauer, Renate Nikolay, member of the Commission Staff of Catherine Ashton, the Union's High Representative on Foreign Affairs, emphasised that for the time being the issue of promoting foreign trade remained the responsibility of individual states. The setting up of a European office for foreign affairs was the principal task that now lay ahead. Leaving consular activities aside, it remained to be seen what responsibilities this office would take over and whether in the mid-term it would take the place of national representations abroad.

Alexander Lau, Head of the Department for Foreign Trade at the DIHK and AUMA's representative in Brussels, presented the results of the DIHK company survey entitled "Going International 2009 – the experiences of and prospects for the German economy concerning foreign trade". Information was also given on the current situation and prospects regarding EU funding for trade fairs. The EU programmes supporting participation in trade







fairs and matchmaking events and seminars at trade fairs are regional programmes which promote cooperation with non-EU countries. In the case of industry-specific development programmes participation in trade fairs may be part of a larger project and be eligible for support.

Jörg Kronenwerth, General Secretary of the European Major Exhibition Centres Association (EMECA), explained the EMECA's involvement in the AL Invest EU development programme which supports trade fair participation. As part of this programme EMECA is responsible for coordinating and organising the participation of South American companies at trade fairs in Europe.

Other topics included China's prospective laws for licensing trade fairs and an ISO standard on the sustainability of event management which is also to apply to trade fairs.



Institute of the  
German Trade  
Fair Industry





## Institute of the German Trade Fair Industry

### Vocational training and advanced training

AUMA gives full backing to the vocational training and advanced training courses of public and private sector sponsors. Supporting conferences for career starters in the events industry has also become a key issue. Furthermore, AUMA has launched a pilot project, a trade fair training course for new enterprises.

**Training courses for vocational teachers** ■ On 26 and 27 November 2009 42 teachers attended a two-day course in Berlin for training events specialists which was organised by AUMA. The aim of this course is to provide teachers with concrete instruments and concepts for use in everyday teaching and to throw light on new developments regarding legal, taxation and insurance issues in the events industry.

Leading speakers and experts with practical experience in this field accompany this course. For teachers this course provides a platform for advanced training, exchanging views and meeting colleagues. AUMA has been organising this approved advanced training course for the last nine years. This is the only course offering specific job training for vocational teachers from around Germany.

**Conferences for newcomers to the events industry** ■ In recent years a fair number of large and small events specialising in different areas have taken place, enabling newcomers to the events industry to learn about organising, planning, holding and evaluating events. AUMA has supported several of these events, for example by offering lectures, seminars and sponsorship deals.



*Koelnmesse*

**University courses teaching trade fair related subjects** ■ Based on research carried out by AUMA, 45 universities and technical colleges in Germany offer in-depth courses dealing with trade fair related subjects. The courses and contact details of the relevant universities are listed on the AUMA website, where professors and lecturers can also find surveys, statistics and presentation material for direct use in teaching events. Furthermore, in 2009 members of AUMA introduced trade fair topics to lecture theatres, with numerous papers and seminars at universities and various institutions offering advanced training.

**Trade fair courses for new enterprises** ■ AUMA is planning a qualification drive that targets business startups and new SMEs with little or no trade fair experience, aimed particularly at those participating in trade fair supporting programmes.

The principal aim is to help young entrepreneurs incorporate trade fair presentations into their overall marketing concept and to plan their participation as thoroughly and successfully as possible to ensure long-term gains. Representing a pilot project, three courses were organised in spring 2010.



*Leipziger Messe*



## Seminar Alliance of German Trade Fairs

Founded by eight German trade fair companies, the Seminar Alliance of German Trade Fairs within AUMA entered its third year of business in 2010. AUMA has sponsored this initiative from the very beginning. The industry publishers m + a and the Association for Direct Business Communication (FAMAB) are associated partners. Messe Frankfurt coordinates the organisation of the seminars.

The Seminar Alliance and its thirteen members (Messe Berlin, Messe Düsseldorf, Messe Essen, Messe Frankfurt, Hamburg Messe, Messe Karlsruhe, koelnmesse, Leipziger Messe, Messe München, Nürnberg Messe, Landesmesse Stuttgart, MCH Messe Schweiz and Reed Exhibitions Messe Wien) offer courses on trade fair topics to executives from the events industry in locations around Germany. The courses are the same, regardless of the venue. Exhibitors attend courses at the city hosting trade fairs nearest to where they live. Last year 202 exhibitors took part in 20 training seminars.

**expobusiness congress** ■ Taking as its slogan “made by exhibitors for exhibitors” the expobusiness congress of the Seminar Alliance of German Trade Fairs within AUMA took place at Messe Frankfurt on 6 and 7 July 2009. 155 delegates took part, most of them representing companies who exhibit at trade fairs.

The congress was organised by the publishers m + a and Akademie Messe Frankfurt. The focus of the lectures and workshops was on reports documenting exhibitors’ experiences at trade fairs and on concepts for achieving greater success at trade fairs.

This year the Seminar Alliance of German Trade Fairs within AUMA held the expobusiness congress at NürnbergMesse on 8 and 9 September 2010. AUMA acted as patron and once again the congress was organised by m + a Verlag and Akademie Messe Frankfurt.



*Messe Stuttgart*

*AUMA acts as patron*



## Research

Commissioned by AUMA, the Munich-based ifo Institute conducted a survey on the overall economic impact of trade fairs in Germany which was presented in autumn 2009.



*Messe München*

According to the survey, every year trade fairs boost German economic output by EUR 23.5 billion. They also ensure 226,000 full-time jobs. Furthermore, trade fairs generate EUR 3.8 billion in taxes at federal, state and municipal level. Thus, besides fulfilling their main purpose of providing a marketplace and transparency for supply and demand in individual sectors, trade fairs also have a considerable overall economic impact.

The most important indicator reflecting the overall economic impact is spending by exhibitors from Germany and abroad at German trade fairs. From 2005 to 2008 this amounted to EUR 7.8 billion for an average trade fair year. At around 31%, stand construction, transport and other stand related services make up the largest part of spending, followed by stand rental and ancillary costs (close to 21 %), staff (more than 16 %), accommodation and catering (close to 13 %), and travel costs (about 10 %). Spending on national and international trade fairs comprises EUR 6.4 billion of exhibitors' overall investment (EUR 7.8 billion). It also means that this category of trade fair has a substantial regional and overall economic impact, in particular because accommodation and travel costs are above average. Conversely, it means that regional trade fairs, which frequently attract local exhibitors, have a lower economic impact on the local region.

Figures for visitors are similar: Money spent by visitors attending national and international trade fairs comprises EUR 2.9 billion of overall visitor spending (EUR 3.8 billion), as they often travel long distances and frequently stay for one night or more, particularly if they are guests from abroad. At 23 % accommodation makes up the largest part of visitor spending, followed closely by travel costs (22.5 %) and cater-



ing (about 21 %). At EUR 7.8 billion and EUR 3.8 billion respectively, direct exhibitor and visitor spending totalled approximately EUR 12 billion, including investments by trade fair venues, which from 2005 to 2008 represented an average in excess of EUR 400 million.

Direct spending by exhibitors, visitors and trade fair venues impacts almost all sectors of the German economy. Income as a result of this effect, a large part of which is spent again, must also be taken into account. Thus according to calculations by the ifo Institute the result is a boost in output double that of direct spending, a total of EUR 23.5 billion. The impact on the employment market is that 226,000 people have full-time jobs as a result of trade fairs, nearly half of whom (117,000) work in the services sector. However, commerce, transport, the news industry (52,000 jobs) and manufacturing (47,000) also benefit considerably from trade fairs held in Germany.

During the survey the ifo Institute drew mainly on research examining the regional economic impact on individual cities hosting trade fairs, which ifo had carried out in previous years using almost identical methods. The survey was based on questionnaires given to 15,500 exhibitors and 71,000 visitors. This made it possible to outline typical spending behaviour by exhibitors and visitors which was projected onto trade fairs for which no questionnaires were available. Based on this data, spending by exhibitors and visitors was calculated first. ifo then determined the overall economic impact using an integrational macro-economic model, a so-called input-output analysis.

The AUMA Trade Fair Transparency Working Group acted as advisors to the project. The group consists of representatives from the market research divisions of organisers and trade fair experts from industrial enterprises and associations.

*Trade fairs boost economic output by EUR 23.5 billion*



*NürnbergMesse*

## German Trade Fair Library



*Visitors can prepare their visit by  
conducting research online*

As a public institution the German Trade Fair Library in Berlin offers services to everyone looking for information on trade fair related topics. Students, teaching staff and those directly involved with trade fairs receive help in their search for relevant publications and answers to questions concerning trade fairs. In close proximity to the specialist departments of AUMA and with staff to assist on hand, it offers visitors an opportunity to exchange information in a direct and uncomplicated manner.

The German Trade Fair Library, which AUMA set up as a special library in 1997 and which has been expanding ever since, now has more than 7,200 titles in stock. In 2008 it became part of the Institute of the German Trade Fair Industry. Its principal users are students, undergraduates, researchers undertaking PhDs, and lecturers whose focus is on trade fairs and congresses. Advisers, journalists and employees with event organisers and trade fair service providers also visit the library and make research inquiries. In 2009 there were approximately 280 visits to the library and around 600 research requests, which compared with 2008 represented a further increase in the library's use.

Due to the fact that the library aims at ensuring that visitors can make use of all publications at the library, borrowing options are extremely limited. However, it is possible to satisfy many external requests through the use of an external copying service, for which a charge is made. Visitors may research information in the library catalogue over the internet, making it easy to use the titles stocked. Users can save time by preparing their visit online, enabling them to gain an overview of literature on their subject.

Since 2005 it has been possible to search for titles in English, using English keywords, providing that users access the catalogue via the English-language pages of the AUMA website.

For more information ► [www.auma.de](http://www.auma.de) / English / Trade Fair Library



Trade fairs  
abroad





## Trade fairs abroad

### The competitive situation around the world

With the economies of almost every major country and the volume of global trade in decline, the impact on the trade fair industry has been severe. However there are clear signs of recovery. German organisers continue to focus on expansion abroad, as in the mid-term higher growth rates are expected than in Germany. Equally, and irrespective of the current recession, more and more small and medium-sized enterprises in Germany see better growth prospects abroad. This also puts additional demands on the federal government's efforts to promote exports, particularly in the context of the foreign trade fair programme.

For this reason AUMA conducts a particularly in-depth analysis of those trade fairs abroad which compete with international events in Germany. In 2009, for the first time since 2004 AUMA carried out a survey among all the organisers of international trade fairs in Germany requesting information on their most important competitors abroad. Worldwide more than 360 events competing closely with German trade fairs were identified, 130 of which German organisers had not yet focused on five years ago.

In developed markets, the trade fairs which German trade fairs regard as relatively strong competitors are in the USA (73 trade fairs), Italy (57), France (56) and the UK (28). China (26 trade fairs) is already ranked fifth among major competing nations, ahead of Spain (19). Approximately two-thirds of the competing trade fairs take place in Europe, the majority in countries of the EU. One in five competing trade fairs take place in the USA, one in seven in Asia.





The trade fairs abroad which German organisers frequently name as competitors are events for the food industry, the automotive industry, the building engineering and building machinery industry, for food and packaging machines, and for the energy industry.



*The second largest exhibition grounds in the USA: Orange County Convention Center, Orlando*

The majority of events competing with German trade fairs in the agriculture, food and catering, automotive, building engineering, medical systems, transport, boats, wood processing, art, advertising and marketing sectors are in Europe. In the hardware, camera, music, dental medicine and electrical engineering sectors most of the events competing with German trade fairs are held in the USA, whereas most of the competitors exhibiting textile manufacturing machines take place in Asia.

Despite serious international competition international trade fairs in Germany continue to be in the lead. In 2008, an average trade fair abroad competing with an average international trade fair in Germany reported 81 % of the net space, 69 % of exhibitors, and 87 % of the visitor attendance of its German counterpart. In this context it should be noted that in Germany 150 international trade fairs take place every year, whereas the above-mentioned

competitors abroad represent a relatively small group of leading events in their respective countries. Accordingly, the average statistics for an imaginary trade fair abroad competing with a German trade fair are as follows: net space totalling 37,300 m<sup>2</sup>, 1,025 exhibitors and 58,700 visitors.

**Double-digit rate of decline in the USA** ■ In 2009 the trade fair industry in the USA suffered more losses. In 2008 figures released by the Index of the Center for Exhibition Industry Research (CEIR) showed a negative trend for the first time since 2002, which subsequently continued in 2009. CEIR described the situation as a historic tribute which the recession had demanded of the USA's trade fair industry.



In 2009, according to the CEIR Index the trade fair industry contracted by 12.5 %, four times more than the previously highest decline in 2008. Compared with figures for the fourth quarter of 2008, in the same quarter of 2009 the net display area fell by 12.3 %, exhibitor numbers by 5.8 % and visitor attendance by 4.1 %. Organisers' turnover figures fell by more than 13 %. Around 5,000 exhibitions for trade visitors and the general public take place in the USA every year.

In 2009, the largest US trade fair organiser, Nielsen Business Media, reported a 25 % drop in turnover, EUR 125.6 million, compared with EUR 171.8 million in 2008.

**Marginal recovery in Italy** ■ Due to the recession Italy's trade fair industry also suffered losses. The Italian trade fair association AEFI conducted a survey of 33 of its trade fair organisers to find out how business had developed in the second and third quarters of 2009, enabling a year-on-year comparison with 2008. In both cases more than one in three of the organisers reported a drop in exhibitors. Equally, more than one in three reported stagnating figures. Only one in four reported an increase in exhibitor numbers. 42 % of the members polled rented out less space than in the same period in 2008. About one in three rented out the same amount of space. Only about one in five of the organisers rented out more space. Exhibitors from Italy in particular either rented less stand space or did not take part at all. Whereas in the second quarter of 2009 43 % of those organisers polled reported a drop in visitor attendance, in the third quarter there were already signs of a slight recovery. Only 10 % of those polled still reported less visitor numbers. By contrast 50 % already reported an increase in visitor attendance. Italian customers in particular returned to visit domestic trade fairs in greater numbers. Italian trade fair organisers are cautiously optimistic that there will be no further losses.



*Fiera Milano*



*Fira Barcelona*

Turnover figures in 2009 also reflected the economic climate. Fiera Milano reported a turnover of EUR 297.1 million (2008: EUR 306.5 million). Veronafiere reported EUR 82 million (2008: EUR 88 million), Rimini EUR 78.5 million (2008: EUR 97.3 million).

Figures from the European Major Exhibition Centres Association (EMECA) in Spain painted a very gloomy picture. Exhibitor numbers here dropped by 20 % and more.

By contrast Fira Barcelona, Spain's second largest trade fair company, reported only a relatively moderate drop in turnover, EUR 116.1 million at the end of 2009, compared with EUR 121.2 million in 2008.

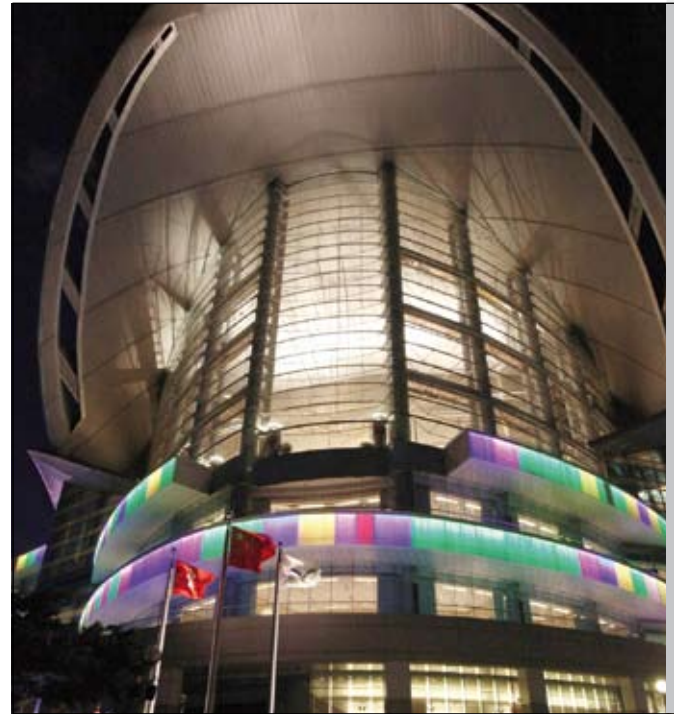
**Moderate decrease in France** ■ Due to the recession, in 2009 the three largest trade fair organisers and companies operating exhibition grounds also suffered losses. GL Events reported a turnover of EUR 581.4 million (2008: EUR 605.7 million). Their business activities include trade fair and congress centres, organising trade fairs and congresses, stand construction, other trade fair and marketing services, and holding and outfitting sporting and large-scale events. VIPARIS also reported a drop in turnover. In 2009 renting out exhibition space and providing services for guest organisers amounted to only EUR 285.3 million (2008: EUR 300.4 million). Comexposium reported a turnover of EUR 195 million (2008: EUR 226 million). The company was founded in 2008 along with VIPARIS after the exhibition business of the Paris Chamber of Industry and Commerce (CCIP) merged with that of the real estate group Unibail-Rodamco.

**UK trade fairs rent out less space** ■ Over the last five years the UK trade fair industry has suffered a decline in space rentals. According to figures released by the UK trade fair association AEO, in 2009 the amount of space rented out equalled 2.8 million m<sup>2</sup>, compared with 3.2 million m<sup>2</sup> in 2008. It is feared this trend will continue in 2010.



Nor were Reed Exhibitions, the world's largest organiser of trade fairs, spared the effects of the recession. They reported a 10 % drop in turnover in 2009. Due also to the weak pound turnover last year equalled EUR 720.1 million. At EUR 324.5 million United Business Media's turnover in the events sector was only marginally less than in 2008 (EUR 324.6 million). dmg world media's losses were more severe. In 2009 their turnover was only EUR 192.4 million (2008: EUR 226.2 million). Bucking the trend, the turnover of the ITE Group rose to EUR 128.3 million (2008: EUR 123.3 million). Informa published separate trade fair figures for the first time since the takeover by IIR Exhibitions. Their turnover totalled EUR 100.8 million in 2009.

**Capacity increases in China** ■ Despite the financial crisis China's trade fair industry figures remained relatively stable, although they fell short of the record results in 2007. These are the findings of the Annual Report on the China Exhibition Industry in 2009, published by CCPIT, the China Council for the Promotion of International Trade. Due not least to a number of state measures it was possible to avoid even heavier losses. Over the last five years trade fair business has remained stable at the three leading trade fair venues, Shanghai, Beijing and Guangzhou. Following a prolonged period of growth, characterised by trade fair topics overlapping at events and strong competition, the market has settled down. From 2005 to 2009 the number of trade fairs held at these three venues dropped from 950 to 837. One of the factors influencing this trend has been the emergence of trade fairs in "second-tier" cities where many new trade fairs have been organised, in many cases only as a test. This often has a serious impact on smaller, not yet firmly established events at leading trade fair venues.



*Hong Kong Convention  
and Exhibition Centre*

Following the period between 2001 and 2005 when a large number of exhibition grounds were built, a second even larger building boom appears to be on the horizon. Numerous cities throughout China are planning to build exhibition grounds of unprecedented size. In



Guangzhou, for example, construction has begun of the International Commodity Exhibition and Trade City, covering 1.5 million m<sup>2</sup> and five times larger than the China Import & Export Fair Complex, China's largest exhibition grounds to date, which are also in Guangzhou. Chongqing is planning to build the Western China International Convention & Exhibition Center, which initially will cover an area of 300,000 m<sup>2</sup>, and eventually 900,000 m<sup>2</sup>. The CCPIT has already voiced concerns that trade fair business may not be able to keep up with the construction of new grounds.

## Supporting German exhibitors abroad

Compared with 2008 the overall figures for the programme are down. Out of the 285 trade fair representations originally planned, 231 took place, 15 less than in 2008. Due to cost-cutting measures six previously planned joint representations were downsized to information stands. Overall there were 21 German Pavilions for companies less to take part in.

A drop in the number of pavilions featuring company stands led to an overall decline in participants and space occupied by the 2009 programme. However, the decline in these two principal areas was disproportionate. Compared with the previous year's figures, at an average German Pavilion featuring company participation exhibitor numbers and the amount of space occupied were down. Overall 6,200 exhibitors (-19 %) took part in the programme. The 231 participations occupied an area covering 121,493 m<sup>2</sup> (-27 %).

*Moscow and Shanghai – the main venues of the foreign trade fair programme*

**German Pavilions online** ■ The internet portal [www.german-pavilion.com](http://www.german-pavilion.com), which links to the individual pages of joint representations, in particular makes it easier to get in touch with the companies involved with the German Pavilion. In 2009, this feature of the foreign trade fair programme provided access to close to 180 representations. Companies exhibiting at trade fairs embraced this measure supporting the programme on an even greater scale and by the end of 2009 the number of page views reached more than 20 million.





**Special supporting programmes – Renewable Energies + Energy Efficiency** ■ Since 2003, as part of its Renewable Energies supporting programme, the Federal Ministry of Economics and Technology has supported small and medium-sized enterprises at selected trade fairs abroad. Energy Efficiency was added in 2008.

Every year the special programmes cover 20 to 25 trade fairs worldwide. Renewable energies and energy efficiency must feature significantly in the products listed in the classification of the trade fairs in question. 22 representations were organised at trade fairs in 2009, with 24 planned for 2010.

Since 2007 AUMA has suggested numerous relevant trade fairs from around the world for inclusion in these programmes. Once a year a working group under the patronage of the Federal Ministry of Economics and Technology assesses the events and selects exhibitions.

**2010 foreign trade fair programme** ■ The foreign trade fair programme lists more than 220 German Pavilions in 2010, for which EUR 40 million have been put at their disposal. The People's Republic of China (excluding the special administrative region of Hong Kong) reclaimed its previously held title as the most important country within this programme. The 2010 programme lists 48 German Pavilions in China. Previously the top spot was briefly held by Russia (currently 44 representations), followed by the United Arab Emirates and the USA.

16 trade fair participations are planned for India, reflecting this country's importance as a regional market. In 2010, for the first time, 25 trade fairs have been included in the programme.





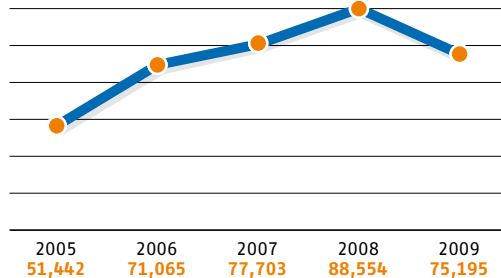
## Trade fairs abroad held by German organisers

The worldwide recession has also affected German organisers' trade fairs abroad, whose concepts reflect the standards of leading international events. For the first time in many years their numbers fell. Last year there were 211, compared with 220 in 2008.

The organisers rented out more than 1.8 million m<sup>2</sup> (2008: 2.3 million m<sup>2</sup>), 8 % less than at corresponding events in previous years. Exhibitor numbers fell too. In 2009 around 75,200 companies exhibited their products and services, as against 88,500 in 2008, compared to corresponding events in previous years, the drop was around 4 %. Due to the introduction of several new consumer exhibitions visitor attendance rose to over 5.5 million, compared with 4.9 million in 2008.

### Trade Fairs Abroad by German Organisers\*

Number of exhibitors



\* AUMA members

Intertextile Shanghai Apparel Fabrics reported the highest number of exhibitors. Trade fairs attended by more than 2,000 exhibitors included Automechanika Shanghai (2,404) and China International Hardware Show Powered by PRACTICAL WORLD (2,016). The highest figures for visitor attendance were reported at three motor shows. More than 950,000 visitors attended the Seoul Motor Show, around 600,000 came to see Auto Shanghai and over 410,000 were at the Chengdu Motor Show. The Abu Dhabi International Book Fair (195,000), Plastindia in New Delhi (130,000) and CeBIT Bilisim Eurasia (126,000) also attracted large numbers of visitors.

Approximately half of the 1.8 million m<sup>2</sup> of space was rented out by German trade fair companies in China. There were close to 33,000 exhibitors at 67 trade fairs, and visitor attendance exceeded 2.3 million, so that despite losses and in the wake of record figures in 2008, 2009 was the second most successful year for trade fair business in China to date. There were less fixtures on the trade fair calendar in



2009 and a number of scheduled trade fairs did not take place. Compared with corresponding events in previous years, and unlike in most other countries, exhibitor and visitor numbers continued to increase, although the growth rate was not as high as in previous years. Exhibitor numbers rose by 3 % and visitor attendance by 10 %.

According to figures released by the Russian trade fair association RUEF, the Russian trade fair market was among the hardest hit by the recession, reporting losses of between 20 and 30 %. In 2009 the figures for rented space, exhibitor and visitor attendance reported by German organisers in Russia fell too, although not as sharply.

More than 12,500 companies (16 % less than at corresponding events in previous years) exhibited their products and services at 31 trade fairs, occupying approximately 300,000 million m<sup>2</sup> (-23 %). Last year visitor attendance totalled 390,000 (-13 %). In India the positive trend of recent years continued throughout 2009. The number of trade fairs held increased to 24, from 22 in 2008. Boosted by Plastindia, India's largest German trade fair which is held every three years, over 4,300 exhibitors rented space totalling more than 95,000 m<sup>2</sup>. Visitor attendance was close to 200,000. Mumbai has become the main venue for German trade fairs in India. 15 events took place here in 2009.

Last year, in the United Arab Emirates, more companies exhibited at German trade fairs than ever before. A total of 5,500 companies rented more than 90,000 m<sup>2</sup> of space at 17 trade fairs.

In 2010, 18 members of AUMA intend to hold 237 trade fairs around the world, significantly more than in 2009.

The countries primarily targeted by German trade fair organisers are China (78 trade fairs) and Russia (35). In India the strong upwards trend continues (30, previously 24). 14 trade fairs each are to take place in the United Arab Emirates and Turkey, and 11 in Brazil. In terms of cities, Shanghai (37 trade fairs), Moscow (28) and Beijing (19) top the list.



In order to emphasise the quality of German trade fairs abroad, in consultation with the working group set up for its members working abroad, AUMA has created a seal of approval denoting “German Trade Fair Quality Abroad (GTQ)”. This group enables event organisers to exchange experiences and opinions on a regular basis.

## EXPO 2010 in Shanghai



EXPO 2010 in Shanghai, which takes place from 1 May to 31 October 2010, is the largest world exhibition to date. Under the theme heading of “better city, better life” the focus is on concepts to meet the challenges of 21st century urban life.

The German Pavilion is presenting ideas and projects from Germany on the topic of “balancity”. Located close by the Lupu bridge and next to the pavilions of France, Poland and Switzerland, it expects up to 45,000 visitors daily and around 8 million over the entire course of the fair. EXPO’s organisers anticipate overall attendance to exceed 70 million visitors.

Headed by General Commissioner Dietmar Schmitz, the Department of Trade Fair Policies / Participation at EXPO of the Federal Ministry of Economics and Technology (BMWi) oversees Germany’s participation at the event.

Managed by Dirk van der Coelen, Koelnmesse International is the company responsible for organisation, while ARGE Deutscher Pavillon EXPO 2010 Shanghai is responsible for the concept, planning and realisation. Milla & Partner from Stuttgart is responsible for exhibition and media design, Schmidhuber + Kaindl from Munich for the architecture and overall planning. The German building enterprise Nüssli from Roth near Nuremberg is responsible for project management and realisation.

Located in a former city-centre industrial zone, the EXPO grounds in Shanghai cover an area of 5.3 square kilometres. The area on which the German Pavilion is built is about 6,000 m<sup>2</sup> in size. 450 staff members



are on hand to assist visitors, among them a core team of 10 members of Koelnmesse International, more than 250 hosts and hostesses and a further 200 workers in the German restaurant.

The 20-metre high German Pavilion is a sculpture in space, with four large display units representing the “balancity” concept of maintaining the balance of the various aspects of a city. The suspended display areas with a walk-in landscape beneath create constantly changing

*The German Pavilion at EXPO in Shanghai, to date the largest German Pavilion at a world exhibition outside Germany*



impressions of the inside and outside, of light, shadows, a city and landscapes. “balancity” advocates “living in a city that maintains a balance between what is new and what remains, innovation and tradition, the community and the individual, work and leisure”.

For more information

► [www.auma.de](http://www.auma.de) / English /  
German Trade Fair Quality Abroad



Marketing,  
media and  
events







## Marketing, media and events

### Marketing for trade fairs made in Germany

AUMA supports the marketing efforts abroad by German trade fair organisers with print media, advertising and poster motifs, as well as with a promotional film entitled “Trade Fairs Made in Germany”.

**Advertising and poster motifs** ■ A worldwide poster and advertising series under the heading of “Trade Fairs Made in Germany” is augmenting international marketing efforts by German trade fair organisers. The motifs are available with captions in four languages: German, English, Spanish and Chinese. All motifs emphasise the international appeal of German trade fairs as global market places. The advertisements are placed in catalogues and publications by German trade fair organisers and by German chambers of commerce abroad, for example. In particular in foreign countries, the poster series is used by opinion-formers and at the information stands of the Federal Ministry of Economics, as part of the trade fair programme abroad.

**An overview of trade fair data** ■ The brochure entitled “Trade Fairs Made in Germany” contains the dates and statistics of international trade fairs, and offers good reasons for taking part in trade fairs in Germany. It is divided into several categories, making it easy to find trade fairs, and has tips on how to use AUMA’s internet database. 115,000 copies of this brochure are circulated in German, English, Spanish and French. Furthermore, in collaboration with chambers of commerce abroad and other partners, more than 40,000 copies are printed in Arabic, Chinese, Greek, Korean, Persian, Portuguese (for Brazil), and in Russian. There is also a Japanese online database at [www.fairs-germany.jp](http://www.fairs-germany.jp), and an additional information flyer is also available.

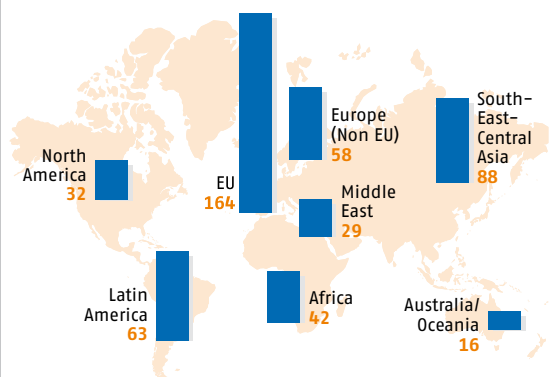


*Dates and statistics of international trade fairs in Germany, available in eleven languages*

Close to 500 opinion-formers in more than 130 countries disseminate these brochures, among them German embassies, German chambers of commerce abroad and local offices representing German trade fairs abroad, and provide information to interested audiences, for example at events. Furthermore, anyone interested may obtain the brochure on any of the 250 information stands representing the Federal Government's official foreign trade fair programme.

### Trade Fairs in Germany 2009

Information offices abroad



**Promotional film - “Trade Fairs Made in Germany”** ■ This film impressively highlights the strong aspects of trade fairs as a marketing instrument and the specific quality and efficiency which German trade fairs have to offer. Germany is shown as a place for business with an innovative, professional and international outlook.

The DVD clip can be listened to in 9 languages: Chinese, English, French, German, Japanese, Russian, Spanish, as well as European and Brazilian versions of Portuguese.

The film is available mainly from information agencies for German trade fairs abroad, and is also used at presentations in Germany.

**German Trade Fair Quality Abroad – GTQ** ■ Besides promoting Germany as an international venue for trade fairs AUMA also advertises the trade fairs held by German organisers abroad. AUMA released a series of promotional measures to accompany the publication of the calendar entitled “German Trade Fair Quality Abroad “. The focus was on placing advertisements. The calendar provides an overview of next year's trade fairs abroad held by German organisers.



## Promoting participation in trade fairs

Among the various options companies have for marketing their products trade fairs are firmly established. However, they must compete with other marketing instruments and increasingly make the public aware of the qualities they possess. AUMA has undertaken a number of measures to highlight these specific qualities.

With new parts now added, the promotional campaign proclaiming “Your success is only fair”, launched in spring 2007, was continued in 2009. In particular it targets small and medium-sized companies, with the aim of motivating those who do not exhibit at trade fairs to take part in them. PR and communications agencies are also specifically addressed. The campaign highlights trade fairs as a marketing instrument using key terms such as success, computer, compass, telescope and barometer. There are neither photos nor other images among the motifs used, which attract attention solely using phonetics as a stylistic device.

The campaign consisted mainly of posters on ICE trains which were designed in cooperation with trade fair organisers, and a supplementary information brochure available on trains. TV news tickers, brief clips ahead of news programmes, videotext content on news channel N24 with weekly trade fair news and the dates of national and international trade fairs in Germany were also broadcast. This was accompanied by banner advertising on the internet and an AdWords campaign. The campaign’s website, [www.erfolgmessen.de](http://www.erfolgmessen.de), provides information on calculating trade fair benefits and basic information on taking part.

A broadly targeted direct marketing campaign provided PR and communications agencies with information on trade fairs as a marketing instrument. The benefits as well as preconceptions regarding trade fairs were discussed in meetings with agencies. In particular information on the effectiveness of trade fairs and the latest research results were much in demand.



*Advertising trade fairs as a marketing instrument*

*The CD-ROM presents an overview of all aspects of trade fair participation: checklists, tools and the Trade Fair Benefit Check*



**CD-ROM „Messe fit. Ready for Trade Fairs“** ■ This guide for companies exhibiting at trade fairs provides comprehensive answers to questions on trade fair participation and the advantages Germany holds as a trade fair venue. It introduces all aspects of taking part in trade fairs and offers exhibitors important planning aids.

The CD contains the Trade Fair Benefit Check, an interactive tool for calculating the effectiveness of trade fair participation, as well as a digital version of the brochures entitled Successful Participation in Trade Fairs, Part I (basics) and Part 2 (a special feature on trade fairs abroad). Users can also link to AUMA's internet database where they can put together their own trade fair calendar. Since its first release in 2003 more than 35,000 copies of the CD-ROM, which is updated annually, have been distributed.

## Online activities

Whether you want to take a quick glance for information or download an entire survey, the AUMA website has trade fair industry data to satisfy everyone's needs, newsletters, press releases, an events calendar and trade fair statistics.

Last year AUMA restructured and updated its website at [www.auma.de](http://www.auma.de). Now all newsletters can be subscribed to over the website and can be downloaded there. AUMA publications are now concentrated under the menu item Downloads & Publications. A new service under the menu heading "German trade fairs abroad" has information on trade fairs abroad held by AUMA members.





Overall the website registered 3.5 million page views last year and 650,000 visits using the new pixel counting method. Two-thirds of visits focused on the new trade fair database, available in four languages. It provides information on dates, services, exhibitor and attendance figures at trade fairs in Germany and abroad, helping interested exhibitors and visitors with their decision-making on whether to attend. AUMA compiles and publicises extensive data on over 5,000 events in Germany and abroad as well as on individual countries and regions. In addition to trade fair information the database contains around 5,000 addresses of event organisers, service providers, public authorities, trade fair organisations and auditing bodies in Germany and abroad.



**Checklists round off the range of internet services for exhibitors** ■ In addition to trade fair data the AUMA website also offers tips on preparing for trade fairs at home and abroad. In particular exhibitors can find out about programmes offered by the German government and Federal States promoting participation in trade fairs. Checklists and online guides make it easy to start up in the world of trade fairs. The Trade Fair Benefit Check program can be downloaded online. This helps exhibitors to evaluate their participation in a trade fair and to identify areas of potential cost-saving, if necessary.

In an effort to promote trade fair participation abroad AUMA highlights individual countries on the website, in particular emerging markets in Asia, the Middle East, but also new EU members, as well as Germany's principal export partners such as France and the UK. In 2009 information on the trade fair markets in the USA, France, Russia and the Benelux countries was either entirely new or updated. Last year the web pages of the 35 online trade fair markets were visited more than 12,000 times.





**Database information available in four languages** ■ All the information on AUMA's trade fair database is also available in English, French, and Spanish. Foreign users can prepare in detail ahead of their visit to a fair, either as an exhibitor or visitor. In 2009 AUMA updated the French version of the AUMA website, which now contains the database, the Trade Fair Benefit Check and a brief overview.

## PR work

Three newsletters published by AUMA provide up-to-the-minute information on its activities, on the latest industry news, research and training courses, as well as issues concerning the EU. AUMA's numerous publications inform the public of the specific qualities of trade fairs, the benefits of participation, thus helping to shape a positive image of trade fairs and of Germany as a venue for events.

Over the course of the year AUMA published 22 press releases providing information on developments in the trade fair industry and new publications. Numerous trade publications and dailies published reports and interviews with representatives of AUMA. Thus several of the trade publications conducted interviews with AUMA Chairman Hans-Joachim Boekstegers and AUMA Managing Director Dr. Peter Neven. A number of national dailies regularly publish a monthly feature on trade fairs dealing with industry topics at numerous events.

AUMA held three press conferences enabling the press to meet directly with the association's chief executives. The 2008 Annual Review was presented on 27 May along with an initial forecast for the trade industry in 2009. At the autumn press conference on 11 November the topics were the release of AUMA\_MesseTrend 2010 and first results of the trade fair industry in 2009.

*The redesigned layout of the  
AUMA newsletter*



## AUMA\_MesseTreff 2009 – meeting of trade fair representatives

Protecting resources was not only the subject of the keynote delivered at the AUMA meeting of trade fair representatives in 2009. Additionally, each guest folded his own recyclable cardboard chair, perhaps an unusual activity at the industry's annual general meeting, but one which put the importance of taking individual responsibility into perspective.

Around 400 representatives of trade fair companies, the trade fair service, exhibitors and visitors from industry, and members of politics and the media accepted AUMA's invitation to attend this industry event on 26 May 2009 on the premises of a former substation in Berlin. Guests included Hartmut Schauerte, Under-Secretary at the Federal Ministry of Economics.

Opening the annual general meeting of the trade fair industry, AUMA Chairman Hans-Joachim Boekstegers said that, in the wake of good business in 2007 and 2008, as a marketing instrument trade fairs would be able to take an economic downturn in their stride. Despite a drop in exhibitor and visitor numbers the role and appeal of trade fairs was beyond question. Even if the main worry was the current state of economic affairs, attention should focus on long-term protection of ecological resources. In this context he reminded the audience that AUMA had already supported laying down standards for sustainable trade fairs in the mid-nineties.

In Germany the term "sustainability" was first coined in 1713, said Klaus Liedtke, the long-standing editor-in-chief of National Geographic Germany in his keynote address. Hans Carl von Carlowitz invented the word, noting "one should never fell more trees than one can grow". Despite this being knowledge for so long, Liedtke said that long-term protection of resources was a concept barely known outside the logging industry, whereas exploitation indeed was. In the time period from 1944 to 2044 the world population will have quadrupled, energy consumption will have increased sixteen-fold, and global tem-



*"One should never fell more trees than one can grow" – the term "sustainability" was first coined in 1713, said Klaus Liedtke in his keynote address at the AUMA meeting of trade fair representatives*



*Guests at the meeting sat on recyclable cardboard chairs which they had folded themselves. AUMA donated them to the "KinderLeben" children's hospice in Hamburg*



peratures will have risen by two to three degrees. How will people obtain food and satisfy their basic needs? It has always been said that the earth can sustain all our needs, but it would take three planets to do so if everyone consumed resources to the same degree as the USA.

However, he noted that there were alternatives to reducing the exploitation of resources. Examples were the manufacturing of products from either renewable raw materials or recyclable materials, and where energy production was concerned a changeover to renewable energies. Quoting the American architect and philosopher R. Buckminster Fuller he said “the fossil fuel deposits of our Spaceship Earth correspond to our automobile’s storage battery which must be conserved to turn over our main engine’s self-starter. Thereafter, our ‘main engine’ must operate exclusively on our vast daily energy income from the powers of wind, tide, water and direct sun radiation energy.”

## Participation in international congresses

**UFI Congress in Zagreb** ■ Taking as its slogan “Back to the future”, the Global Association of the Exhibition Industry (UFI) held its annual congress in Zagreb from 28 to 31 October 2009. 350 members of the trade fair industry took part. Two topics dominated the agenda, the recovery from global recession and the need for future developments in the trade fair industry.



*John Shaw, Comexposium, Paris,  
hands over the reins of UFI  
to Manfred Wutzlhofer,  
Messe München*

After an overview of the economic situation worldwide presented by economics expert Dominic Swords, Jochen Witt explained economic developments in individual parts of the world and their impact on the trade fair industry. He noted that there was economic growth in the USA, but that this did not yet reflect a sustained recovery and was simply the result of state-driven stimulus programmes. By contrast, China’s economy continued to grow due to huge exports, although its domestic market lagged considerably behind. He said that depending on the industry and region, business would take three years to return to normal. Speaking on the topic of “sustainable service as a key to corporate success” Werner Dornscheidt, CEO Messe Düsseldorf,



explained the efforts of his company to attract customers and retain them in the long term. Vince Everts, CEO of Yubby.com, put forward concrete suggestions on how the events industry could incorporate Web 2.0 in its marketing strategies.

Representatives of the North American trade fair associations SISO, CEIR, and IAEE and the South American association AFIDA delivered speeches on the second day of the fair. All of them focused on social marketing and the under-forties age group of the population. Managing Director Dr. Peter Neven and division heads Marco Spinger and Harald Kötter represented AUMA at the congress. Manfred Wutzlhofer, formerly CEO Messe München, took over as president of UFI at the end of October 2009. He in turn will be succeeded by Eric Everard, CEO and co-owner of the Belgian organiser Artexis, at the end of 2010. The congress ended with former UFI president Cliff Wallace, CEO of the Hong Kong Convention and Exhibition Centre, receiving the UFI's Golden Award. The next UFI Congress will take place from 10 to 13 November 2010 in Singapore.



**Meeting of CEFCO in Xi'an** ■ From 14 to 16 January 2010 more than 640 trade fair specialists gathered in the ancient imperial city of Xi'an to attend the 6th China Expo Forum for International Cooperation (CEFCO). Representatives from abroad included members of UFI, the US trade fair associations IAEE and SISO, as well as members of AUMA, who once again voiced their support for the congress organised by the China Council for the Promotion of International Trade (CCPIT). A number of trade fair organisers from Germany, the US and the UK also attended the forum. In his address at the opening event the president of the UFI Manfred Wutzlhofer underlined CEFCO's role as the leading congress for the trade fair industry in China.

*China Expo Forum: a meeting of trade fair experts (from left to right): Edward Liu (Singapore), Lewis Shomer (USA), Supawan Teerarat (Thailand), Liu Haiying (China), Marco Spinger (AUMA), Walter M.S. Yeh (Taiwan)*



*The directory  
of trade fairs abroad  
held by German organisers.  
Published once a year,  
the following year's issue  
appears in autumn 2010.*

At the congress Marco Springer, AUMA Head of Global Markets, talked about Asia's significant role as a very important growth region for German trade fair organisers and for Germany as a venue for trade fairs. Other speech topics included the impact of the recession and the current signs of recovery, the situation in the trade fair industry in Asia, Asia's expansion in terms of it becoming a region for trade fairs, and the effects this has on the trade fair industry worldwide. The next CEFCO Forum takes place in 2011 in Hangzhou, the capital of the province of Zhejiang.

**International trade fair seminar in Bremen** ■ Taking as its slogan "Achieving goals together" the International Trade Fair Seminar took place on 22 and 23 June 2009 in Bremen, attended by around 140 representatives of trade fair organisers from Germany, Austria and Switzerland. The event was co-organised by IDFA, the association representing German medium-sized exhibition venues and the Austrian and Swiss trade fair associations. Three AUMA representatives took part as guests.

## AUMA media for international customers

### Information on the trade fair industry and AUMA

#### ■ AUMA Review – the Trade Fair Industry

An overview of trade fair involvement by German businesses and of the work carried out by AUMA as the association representing the trade fair industry. Published annually in German (in June) and English (in August).

#### ■ AUMA Statement – The Trade Fair Industry

Facts, functions, outlook. Third revised edition, June 2007.





### ■ Portrait: AUMA – Serving the trade fair industry

Information on AUMA's responsibilities, its organisation and members. Published in 2010 in German and English.

### ■ Promotional film – “Trade fairs Made in Germany”

A promotional film highlighting the strong aspects of trade fairs as a marketing instrument and the specific qualities and effectiveness of German trade fairs. The DVD is 2 minutes and 30 seconds long and offers a choice of languages: Chinese, English, French, German, Japanese, Portuguese, Russian and Spanish.

### ■ AUMA Online

Information available from AUMA on the internet: a global trade fair database in four languages, information on planning trade fairs, development programmes, industry statistics, vocational training and advanced training, research, and the German Trade Fair Library. Available at ► [www.auma-messen.de](http://www.auma-messen.de).

### ■ The AUMA Trade Fair Guide for Germany

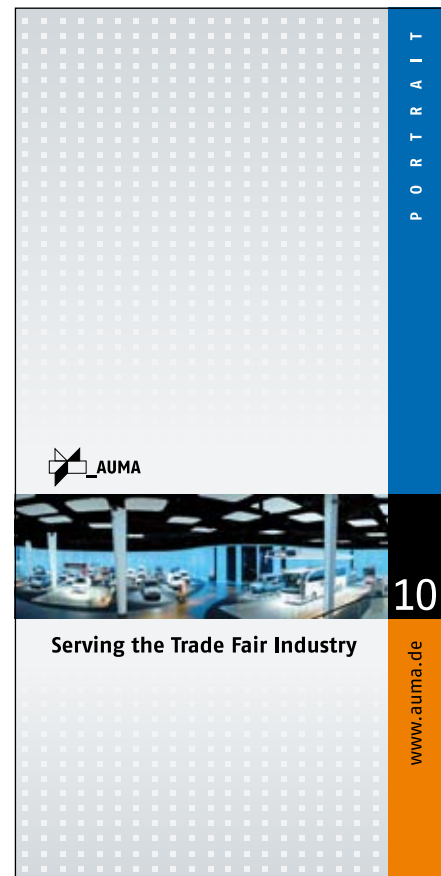
430 profiles of trade fairs by category: international, national, specialised and regional trade fairs. Trade fair register by industry, dates and venue. Published annually in autumn in German.

### ■ Trade Fairs Made in Germany, 2010/2011

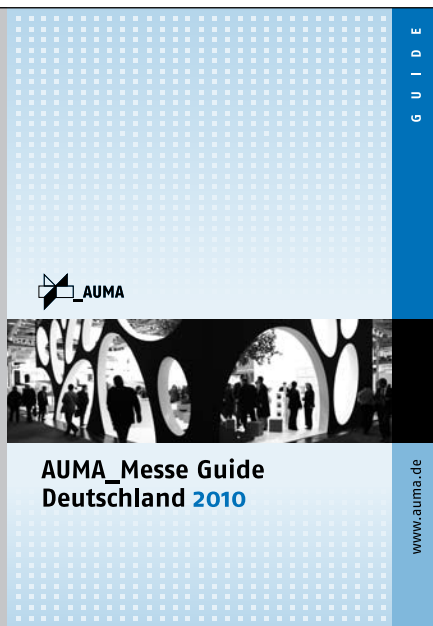
International trade fairs in Germany, with dates, main products, statistics and a subject index. Published annually in spring in Arabic, Chinese, German, English, French, Greek, Korean, Persian, Portuguese, Russian and Spanish

### ■ German Trade Fair Quality Abroad

A list of trade fairs abroad held by German organisers. The names, dates and organisers of approximately 220 trade fairs around the world. Published annually in November in German and English.







### Information on preparing for trade fairs

#### ■ Messe fit. Ready for Trade Fairs

This CD-ROM presents all aspects of taking part in trade fairs and offers exhibitors important tips on how to plan successful participation in trade fairs. The third, fully revised version contains the Trade Fair Benefit Check and instructional videos on how to use the software. Version 3.2 in German and English, released in December 2009.

#### ■ Trade Fair Benefit Check

Software for exhibitors, for planning, calculating and evaluating trade fair participation. Available free of charge in four languages: English, French, German and Spanish. Contains instructional videos on how to use the software. Version 2.3, released in 2010. Available only on the internet at ► [www.auma.de](http://www.auma.de).

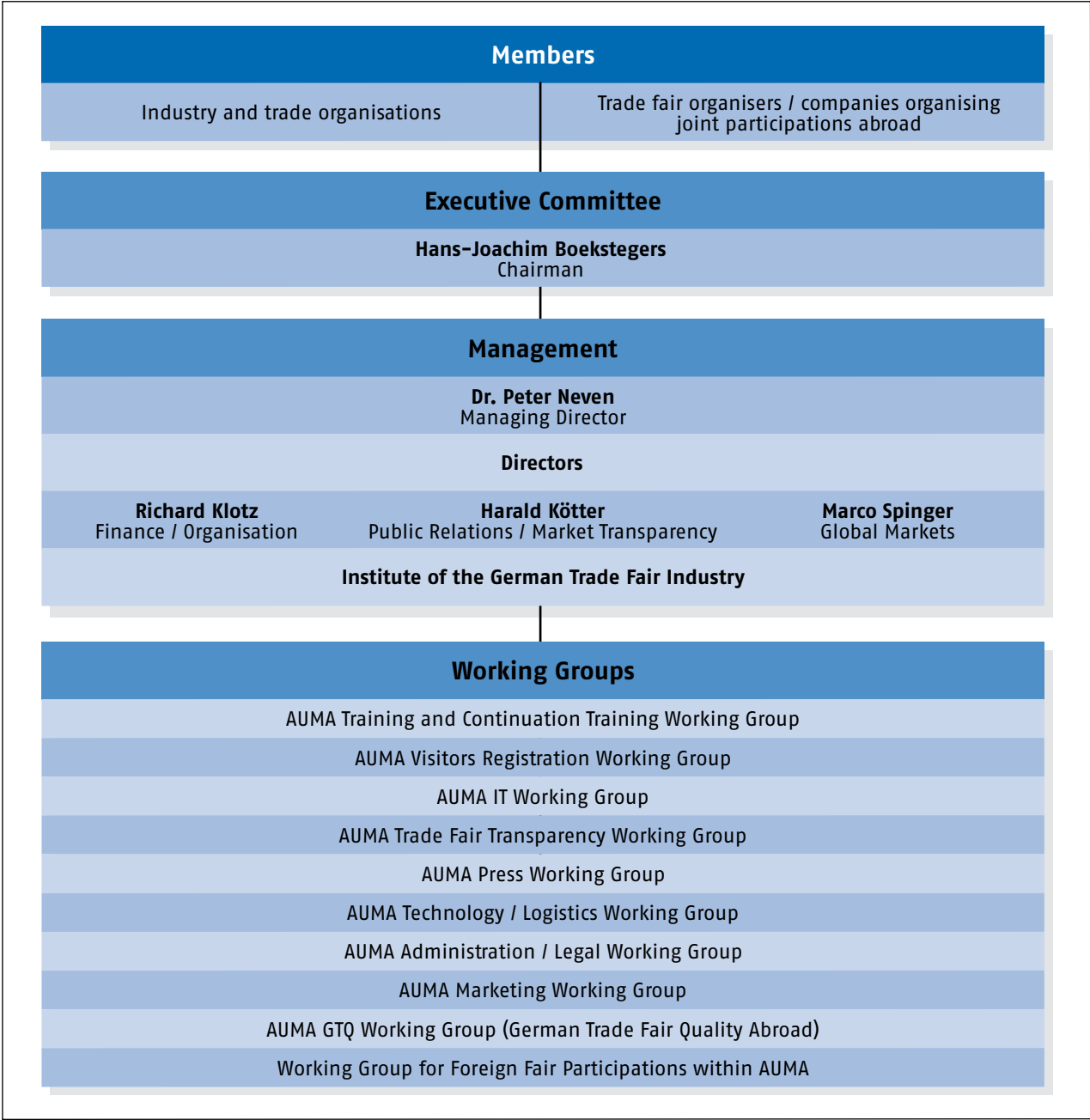
Other AUMA publications are available at

► [www.auma.de](http://www.auma.de) / English / Downloads & Publications



# Organisation





## Members

### Industry and trade organisations

- Association for Direct Business Communication (FAMAB), Rheda-Wiedenbrueck
- Association of German Chambers of Industry and Commerce (DIHK), Berlin
- Association of German Dental Manufacturers (VDDI), Cologne
- Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg
- Association of the German Tool Manufacturers (FWI), Remscheid
- Association of the Steel and Metal Processing Industry (WSM), Duesseldorf
- Caravaning Informations GmbH (CIG), Frankfurt / Main
- Central Committee for German Agriculture, Berlin
- Confederation of the German Textile and Fashion Industry, Berlin
- Didacta Verband – Education Commerce Lobby, Darmstadt
- European Association of Event Centres (EVVO), Bad Homburg
- Federal Association of German Galleries and Editions (BVDG), Berlin
- Federation of German Food and Drink Industries (BVE), Berlin
- Federation of German Heating Industry (BDH), Cologne
- Federation of German Industries (BDI), Berlin
- Federation of German Wholesale and Foreign Trade (BGA), Berlin
- Federation of the Manufacturers of High-grade Consumer Goods (IVSH), Solingen
- General Association of the German Locks and Fitting Industry (FVSB), Velbert
- German Aerospace Industries Association (BDI), Berlin
- German Airport Technology & Equipment e.V. (GATE), Taunusstein
- German Association for Information Technology, Telecommunications and New Media (BITKOM), Berlin
- German Association for Water, Wastewater and Waste (DWA), Hennef
- German Boat and Shipbuilders Association (DBSV), Hamburg
- German Chemical Industry Association (VCI), Berlin
- German Confederation of Skilled Crafts (ZdH), Berlin
- German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt / Main
- German Electrical and Electronics Manufacturers Association (ZVEI), Frankfurt/Main
- German Engineering Federation (VDMA), Frankfurt / Main
- German Federation of the Wood and Plastics Processing Industries (HDH), Bad Honnef
- German Hotels and Restaurants Association (DEHOGA), Berlin
- German Industry Association for Coin-operated Amusement and Vending Machines (VDAM), Berlin
- German Industry Association for Optical, Medical and Mechatronical Technologies (SPECTARIS), Berlin
- German Machine Tool Builders' Association (VDW), Frankfurt / Main
- German Retail Trade Association (HDE), Berlin
- German Shipbuilding and Ocean Industries Association (VSM), Hamburg
- German Sweets e.V., Bonn
- German Winegrowers' Association (DWW), Bonn
- IELA – International Exhibition Logistics Association – German Chapter, Braunschweig
- National Association of German Commercial Agencies and Distribution (CDH), Berlin
- Steel Information Centre, Duesseldorf

### Trade fair organisers / companies organising joint participations abroad

- asfc atelier scherer fair consulting GmbH, Fuerth
- Balland Messe-Service GmbH, Cologne
- DEGA-EXPOTeam GmbH & Co. KG, Obersoercherling
- Deutsche Messe AG, Hanover
- expotec GmbH – Agency for Marketing & Communications, Berlin
- FAMA – Special Association for Fairs and Exhibitions, Erfurt
- Frankfurt Book Fair, Frankfurt / Main
- GDG-Association of Major German Exhibition Organisers, Hanover
- GHM – Gesellschaft fuer Handwerksmessen mbH, Munich
- Hamburg Messe und Congress GmbH, Hamburg
- Hannover-Messe International GmbH, Hanover
- IDFA – Pool of German Trade Fair Organisations and Exhibition Cities, Essen
- IFWexpo Heidelberg GmbH, Heidelberg
- IGEDO Company GmbH & Co. KG, Duesseldorf
- IMAG – Internationaler Messe- und Ausstellungsdiens GmbH, Munich
- INTER EXPO CONSULT GmbH, Berlin
- Karlsruher Messe- und Kongress-GmbH, Karlsruhe
- Koelnmesse GmbH, Cologne
- Koelnmesse International GmbH, Cologne
- Landesmesse Stuttgart GmbH, Stuttgart
- Leipziger Messe GmbH, Leipzig
- Leipziger Messe International GmbH, Leipzig
- Mack Brooks Exhibitions Ltd., St. Albans Herts (UK)
- MCO – Marketing Communication Organisation GmbH, Duesseldorf
- Mesago Messe Frankfurt GmbH, Stuttgart
- Messe Berlin GmbH, Berlin
- Messe Duesseldorf GmbH, Duesseldorf
- Messe Essen GmbH, Essen
- Messe Frankfurt GmbH, Frankfurt / Main
- Messe Friedrichshafen GmbH, Friedrichshafen
- Messe Muenchen GmbH, Munich
- Messe Offenbach GmbH, Offenbach
- Messe Westfalenhallen Dortmund GmbH, Dortmund
- NuernbergMesse GmbH, Nuremberg
- Reed Exhibitions Deutschland GmbH, Duesseldorf
- Saarmesse GmbH, Saarbruecken
- Spielwarenmesse – International Toy Fair, Nuremberg
- the fair agency gmbh, Munich
- WFB Bremen Economic Development, Bremen

Status: 31st July 2010



# Key indicators of the trade fair industry







## Macro-economic significance

The trade fair industry is one of the leading services sectors of the German economy. It also ranks highly on the international stage. In terms of highest turnover, four of the world's top ten trade fair companies are based in Germany.

### Turnover of Trade Fair Organisers worldwide (more than Euro 100 million)

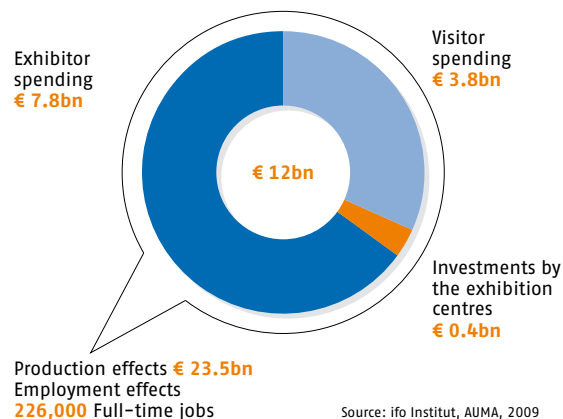
(€ million)

	2009	2008	2007
Reed Exhibitions (GB)	720.1	891.0	842.0
GL events (F)	581.4	605.7	633.5
Messe Frankfurt (D)	423.8	440.2	423.6
United Business Media (GB)	324.5	324.6	245.9
Fiera Milano (I)	297.1	306.5	302.5
VIPARIS (F)	285.3	300.4	
Messe Düsseldorf (D)	255.5	496.0	354.2
Koelnmesse (D)	229.0	191.7	200.6
Deutsche Messe (D)	222.0	241.8	286.0
Messe München (D)	215.2	243.3	299.4
Comexposium (F)	195.0	226.0	
dmg world media (GB)	192.4	226.2	229.6
MCH Group (CH)	190.9	222.2	216.5
Messe Berlin (D)	157.7	199.6	144.4
Jaarbeurs Utrecht (NL)	152.0	145.7	108.5
NEC Birmingham (GB)	139.0	n.a.	201.0
NürnbergMesse (D)	132.7	153.2	125.0
ITE Group (GB)	128.3	123.3	138.9
Nielsen Business Media (USA)	125.6	171.8	170.0
IFEMA Madrid (E)	116.5	186.6	170.6
Fira Barcelona (E)	116.1	121.2	129.6
RAI Amsterdam (NL)	108.2	119.9	133.3
BolognaFiere (I)	105.0	134.0	128.5
Informa (GB)	100.8		

### Trade Fairs in Germany

#### Economic impact based on a multiplier analysis

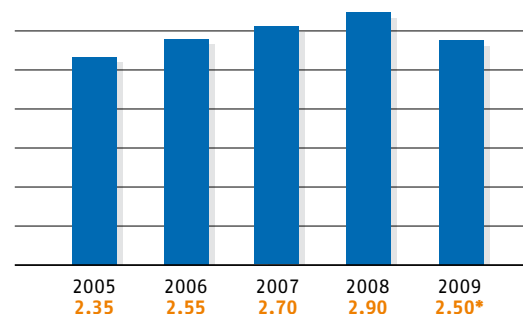
Average trade fair year (period 2005 to 2008)



### Trade Fairs in Germany

#### Turnover of trade fair organisers (€ billion)

Companies organising international and regional events (Turnover incl. trade fairs abroad, congresses and services)



\* preliminary

## International / national trade fairs

Germany is the world's number one venue for organising international trade fairs. Around two-thirds of the world's leading trade fairs for specific sectors are held in Germany.

Compared with 2008 there was a significant decline in figures for 2009. The economic situation was only partly to blame. The fact that relatively few trade fairs took place in 2009 was just as significant.

### Trade Fairs in Germany 2009

The 135 international / national events in comparison to the respective previous events

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	135	-4.3%	-3.5%	-5.0%	-8.4%	-6.0%
Investment goods trade fairs	70	-2.1%	-2.7%	-1.4%	-7.9%	-3.5%
Consumer goods fairs directed to trade visitors	39	-7.1%	-6.1%	-7.5%	-6.1%	-8.1%
Consumer goods fairs directed to the public	19	-4.5%	-3.3%	-6.5%	-9.2%	-9.5%
Trade fairs presenting services	7	-4.9%	-0.5%	-7.2%	-9.0%	-3.9%

### Trade Fairs in Germany 2009

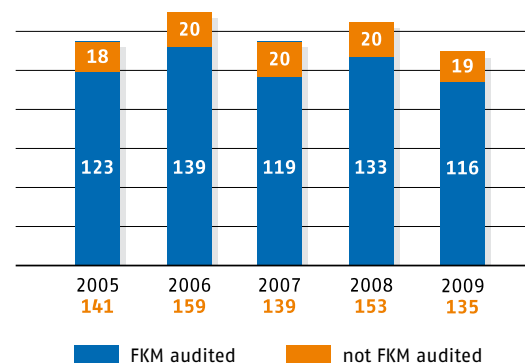
The 135 international / national events in comparison to the respective previous events



### Trade Fairs in Germany

Number of events

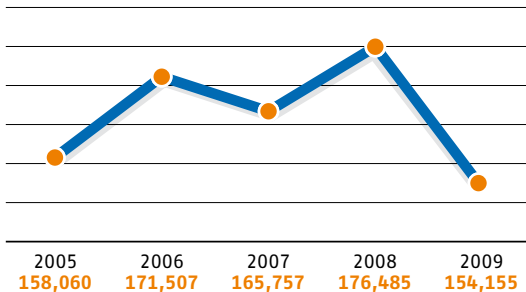
AUMA category international and national events





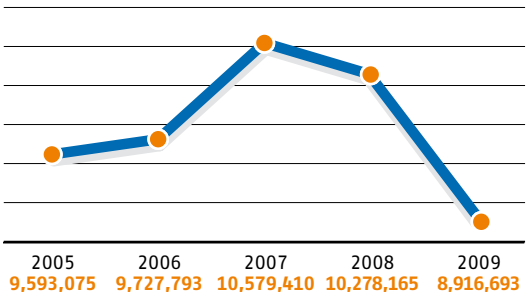
Trade Fairs in Germany

Number of exhibitors  
AUMA category international and national events



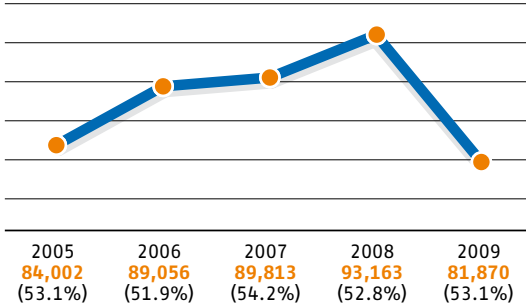
Trade Fairs in Germany

Number of visitors  
AUMA category international and national events



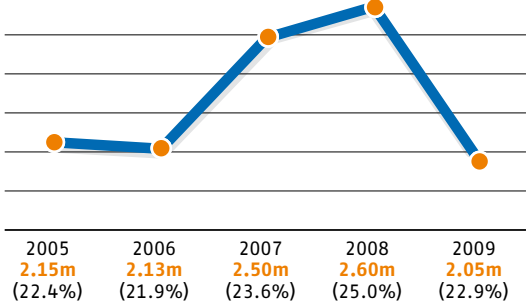
Trade Fairs in Germany

Number of foreign exhibitors  
AUMA category international and national events



Trade Fairs in Germany

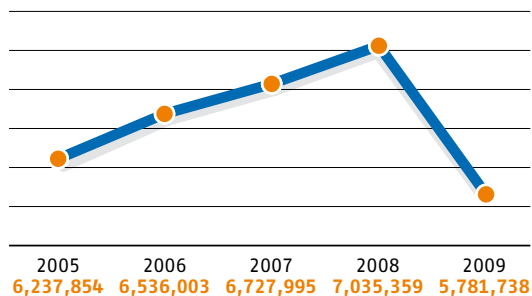
Number of foreign visitors  
AUMA category international and national events



### Trade Fairs in Germany

#### Rented space in sq. m.

AUMA category international and national events



At 22 exhibition grounds in Germany the hall space available for holding international trade fairs and exhibitions totals 2.75 million square metres.

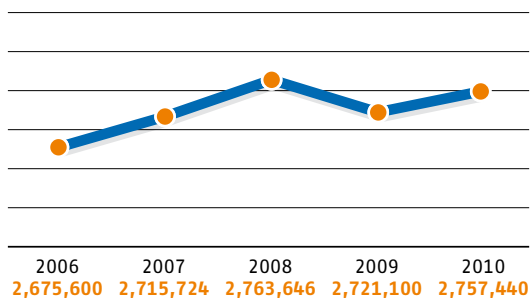
At ten exhibition grounds hall space exceeds 100,000 square metres. At six others hall space exceeds 50,000 square metres.

Over the coming years no significant growth in hall space is expected.

### Trade Fairs in Germany

#### Hall capacities in sq. m.

(each 1st January)



Trade fair centres with at least one event  
according to AUMA category international and national events

### Trade Fairs in Germany 2010

#### Exhibition capacities\*

gross in sq. m.

Location	Halls	Outdoor
Hanover	495 265	58 070
Frankfurt/M.	345 697	95 721
Cologne	284 000	100 000
Düsseldorf	262 704	43 000
Munich (New Exh. Center)	180 000	360 000
Berlin	160 000	100 000
Nuremberg	160 000	50 000
Essen	110 000	20 000
Stuttgart	105 200	40 000
Leipzig	101 200	69 998
Hamburg	86 574	10 000
Friedrichshafen	86 200	15 160
Bad Salzungen	65 195	4 000
Dortmund	59 235	
Karlsruhe (New Exh. Center)	52 000	10 000
Augsburg	48 000	10 000
Bremen	39 000	100 000
Munich (M, O, C.)	30 000	
Saarbrücken	24 600	27 400
Freiburg	21 500	80 000
Offenburg	22 570	37 877
Offenbach	18 500	400

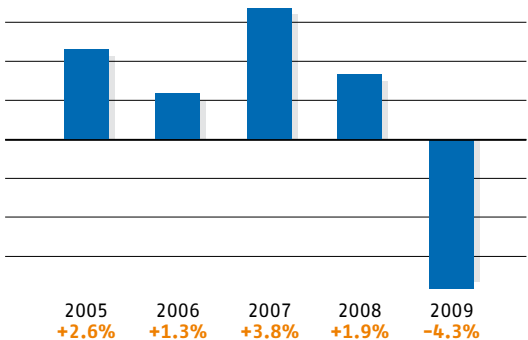
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\* Locations with at least one event  
according to AUMA category international and national events



Trade Fairs in Germany

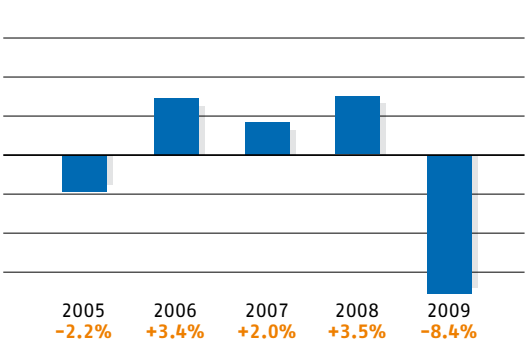
Numbers of exhibitors  
AUMA category international and national events



Development of one year's trade fairs  
in comparison to the respective previous events

Trade Fairs in Germany

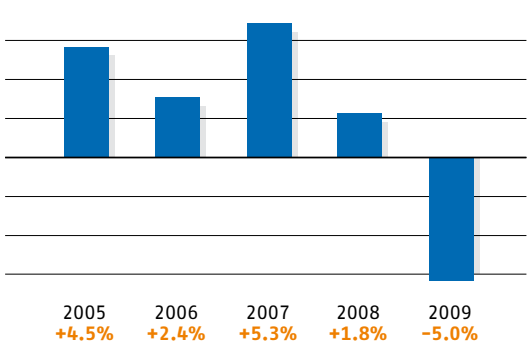
Number of visitors  
AUMA category international and national events



Development of one year's trade fairs  
in comparison to the respective previous events

Trade Fairs in Germany

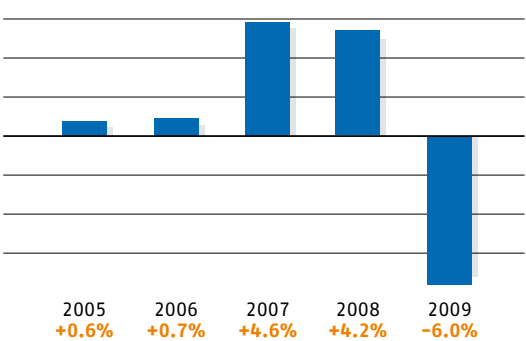
Number of foreign exhibitors  
AUMA category international and national events



Development of one year's trade fairs  
in comparison to the respective previous events

Trade Fairs in Germany

Rented space in sq. m.  
AUMA category international and national events



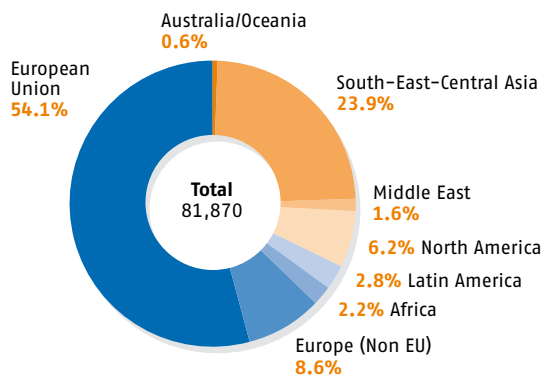
Development of one year's trade fairs  
in comparison to the respective previous events



### Trade Fairs in Germany 2009

#### Foreign exhibitors

AUMA category international and national events



## Regional and specialized events

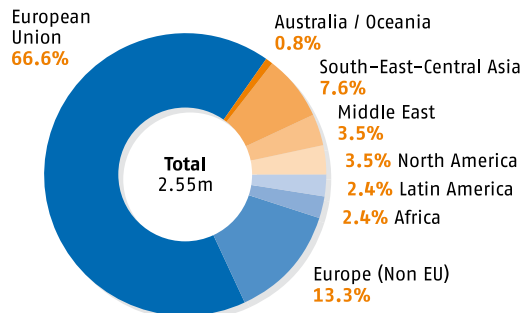
International trade fairs are augmented by a large number of regional trade fairs and consumer exhibitions as well as small events for specialized industries.

Annually around 50,000 exhibitors and 5 to 6 million visitors attend these events.

### Trade Fairs in Germany 2008

#### Foreign visitors

AUMA category international and national events



### Regional and Specialized Trade Fairs and Exhibitions 2009

Development of the 151 events in comparison to the respective previous events

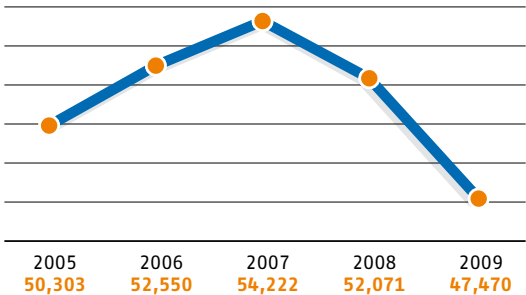
AUMA category regional/special





**Regional and Specialized  
Trade Fairs and Exhibitions**

**Number of exhibitors**  
AUMA category regional/special



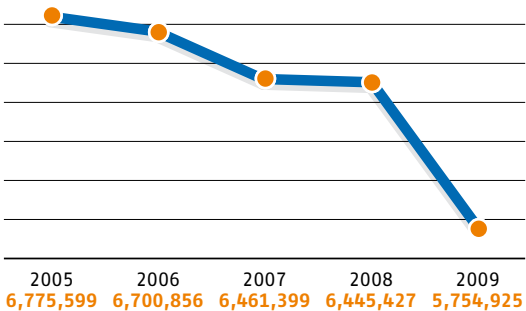
**Trade fairs abroad  
held by German organisers**

Annually, German organisers belonging to AUMA hold approximately 220 trade fairs in important growth regions abroad, in particular in Asia, North and South America and Eastern Europe.

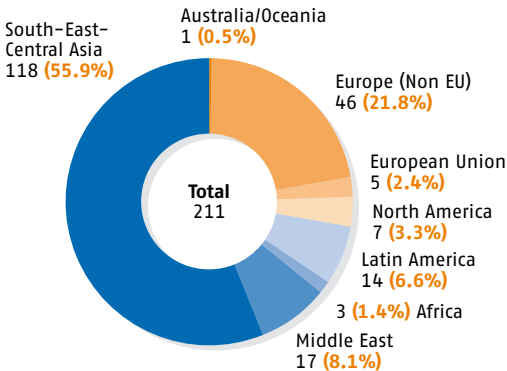
For the most part the tried and tested concepts of leading trade fairs in Germany are applied to selected markets abroad.

**Regional and Specialized  
Trade Fairs and Exhibitions**

**Number of visitors**  
AUMA category regional/special



**Trade Fairs Abroad by  
German Organisers\* 2009**



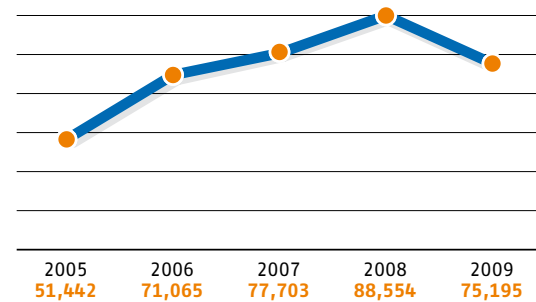
\* AUMA members

Since 2005 the number of trade fairs abroad held by German organisers has risen by more than 25%, but due to the economic situation numbers declined marginally last year.

Exhibitor numbers also fell. Visitor attendance continued to increase.

### Trade Fairs Abroad by German Organisers\*

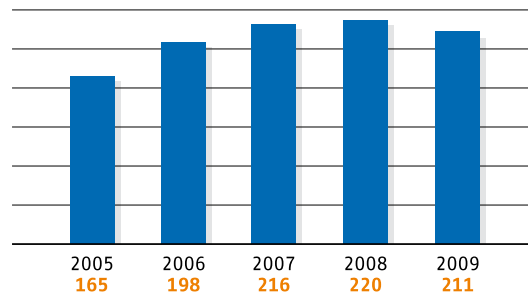
Number of exhibitors



\* AUMA members

### Trade Fairs Abroad by German Organisers\*

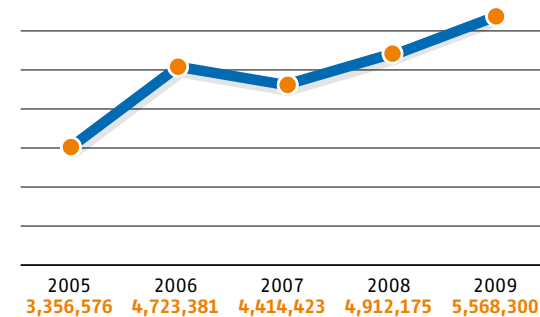
Number of events



\* AUMA members

### Trade Fairs Abroad by German Organisers\*

Number of visitors



\* AUMA members



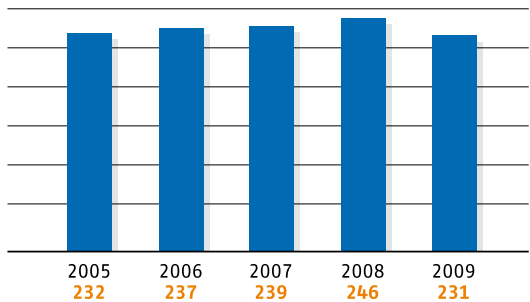
## Foreign trade fair programme

In addition to taking part in events at home German industry also makes widespread use of trade fairs abroad to promote export trade. Particularly for small and medium-sized enterprises the overseas trade fair programme of the Federal Ministry of Economics and Technology represents an important marketing instrument.

In 2009, due to a reduction in the level of support, there was a disproportionate decline in the number and volume of representations at a number of trade fairs.

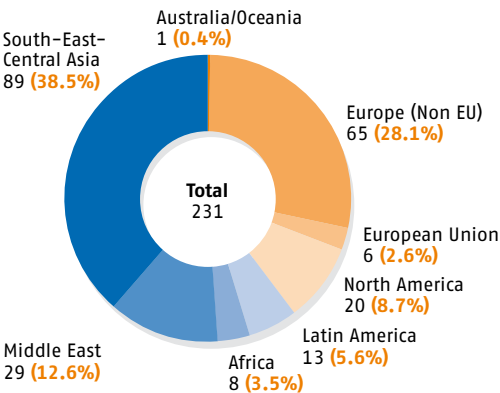
### German Foreign Trade Fair Programme

Number of events  
Participations by the Federal Ministry of Economics and Technology



### German Foreign Trade Fair Programme 2009

Participations by the Federal Ministry of Economics and Technology



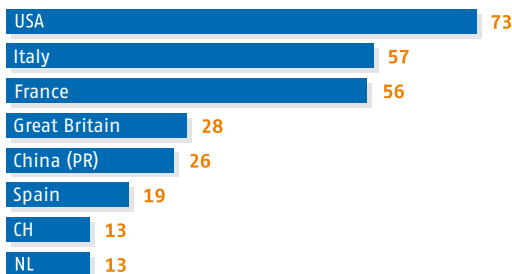
## German trade fairs in the global competition

Three of the world's five largest exhibition grounds are in Germany. Worldwide there are 47 trade fairs where hall space exceeds 100,000 square metres. Twelve of these are not in Europe. Of this number five are in China. 31 of the 35 exhibition grounds occupying more than 100,000 square metres are in Western Europe, four are in Central and Eastern Europe.

The leading trade fairs competing with German events are still in the USA and Western Europe. On average they are still considerably smaller than international trade fairs in Germany.

### Foreign Trade Fairs

Number of competitors to international trade fairs in Germany\*



\* Survey among German organisers from 2009;  
a maximum of three competing events could be specified per trade fair in Germany

### Exhibition Centres Worldwide 2010

Exhibition capacities

gross in sq. m.

Location	Halls
Hanover Exhibition grounds	495 265
Frankfurt/Main Exhibition grounds	345 697
Fiera Milano	345 000
China Import & Export Fair Complex Guangzhou	340 000
Cologne Exhibition grounds	284 000
Düsseldorf Exhibition grounds	263 888
McCormick Place Chicago	248 141
Feria Valencia	230 837
Paris Expo Porte de Versailles	227 380
Crocus Expo IEC Moskau	226 399
Paris-Nord Villepinte	206 000
The NEC Birmingham	201 634
Fira Barcelona Gran Vía	200 000
BolognaFiere	200 000
IFEMA Feria de Madrid, Parque Ferial Juan Carlos I	200 000
Orange County Convention Center Orlando	190 875
Las Vegas Convention Center	184 456
Munich (New Exhibition Center)	180 000
Messezentrum Basel	162 000
Berlin Exhibition grounds	160 000
Nuremberg Exhibition grounds	160 000
IMPACT Muang Thong Thani Bangkok	140 000
VVC Moskau	132 700
Georgia World Congress Center Atlanta	130 112
SNIEC Shanghai	126 500
Veronafiere	122 000
Fiera del Levante Bari	120 000
BVV Brno	119 281
Reliant Park Houston	118 680
Fiera Roma	118 300
Fira Barcelona Montjuic	115 211
Brussels Expo	114 445
MTP Poznan	113 100
Essen Exhibition grounds	110 000
Nanjing International Expo Center	110 000
Eurexpo Lyon	109 000
Rimini Fiera	109 000
Bilbao Exhibition Centre	108 000
New China International Exhibition Center Beijing	106 800
Stuttgart Exhibition grounds	105 200
SZCEC Shenzhen Convention & Exhibition Center	105 000
Geneva Palexpo	102 470
Ernest N. Morial Convention Center New Orleans	102 230
Leipzig Exhibition grounds	101 200
Fiera di Parma	100 000
Singapore Expo	100 000
Jaarbeurs Utrecht	100 000

Status: 1.1.2010

## **Pictures**

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- P. 59: German Pavilion © Yovohagrafie, Deutscher Pavillon
- P. 60: © Exhibition: Milla & Partner / architecture: Schmidhuber + Kaindle
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