

EUROPEAN
EXHIBITION
INDUSTRY
ALLIANCE

EEIA / UFI / EMECA

Survey on Investments
into Exhibition
Infrastructure in Europe

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EEIA/UFI/EMECA SURVEY ON INVESTMENTS INTO EXHIBITION INFRASTRUCTURE IN EUROPE

This survey describes recent and upcoming investments into European exhibition venues

...It is based on a questionnaire sent to all venues in Europe, UFI European Members and Members of EMECA

...With 32 participating venues from 16 European countries it covers the current European trends

...The owner structure of participants is more private than public or a mix of public/private



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AIM AND SET UP OF THE QUESTIONNAIRE

AIM:

- > Get a clearer picture about the investment situation of exhibition venues in Europe

SET UP:

- > Division between investments into refurbishments and expansion of fair grounds
- > Find out priority areas
- > Find out most challenging areas
- > All areas relate to infrastructure, e.g. digitization could mean cable channels, smart buildings, digital entrance solutions, etc.
- > Ask about the way investments are financed
- > Questions as to the past and today/future

- > 18 questions
- > Sent out via UFI and EMECA to all European Venue Members in September 2016
- > 32 answers received

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KEY FINDINGS (1/2)

- > No new major venue developments are planned in Europe
- > Instead, investments go into quality of existing spaces and some increases of exhibition space

- > Investments in the past five years: EUR 3,348 billion
- > Investments in the next five years: EUR 1,791 billion
- > Total investments within 10 years: EUR 5,139 billion

- > Investments into refurbishment were higher in the past than they will be in the future, but all participating venues will invest in the future

- > Number of venues will grow in the following size segments: 25,001-100,000 sqm and over 250,000 sqm

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KEY FINDINGS (2/2)

- > Clear change in area of investment from building/venue to digitization
 - > past: energy efficiency, design and architecture leading
 - > future: digitization by far leading

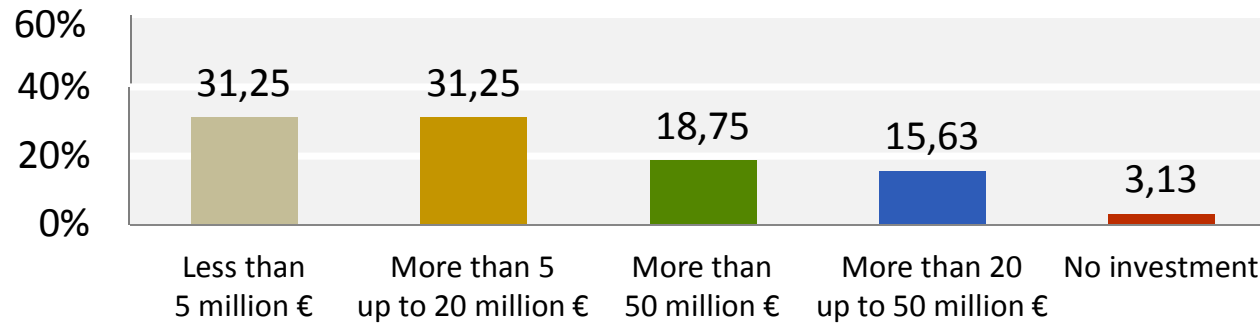
- > Important area
 - > today: digitization, energy efficiency and security leading
 - > in 5 years: digitization increased, energy efficiency and sustainability – security still relatively important

- > Most challenging
 - > today: by far digitization, second security
 - > future: digitization even more challenging

- > 75 % financing by cash flow or bank loan or combination of both

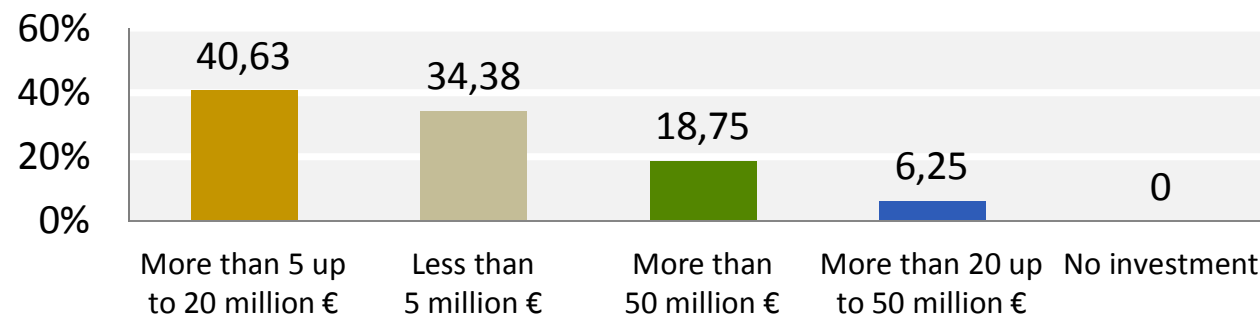
Q2/Q5: HOW MUCH HAVE YOU INVESTED/WILL YOU INVEST INTO REFURBISHING/MODERNISING (EXCLUDING MAINTENANCE) YOUR VENUE INFRASTRUCTURE IN...

THE
PAST
FIVE
YEARS?



→ Past investment ~ EUR 2,616 billion

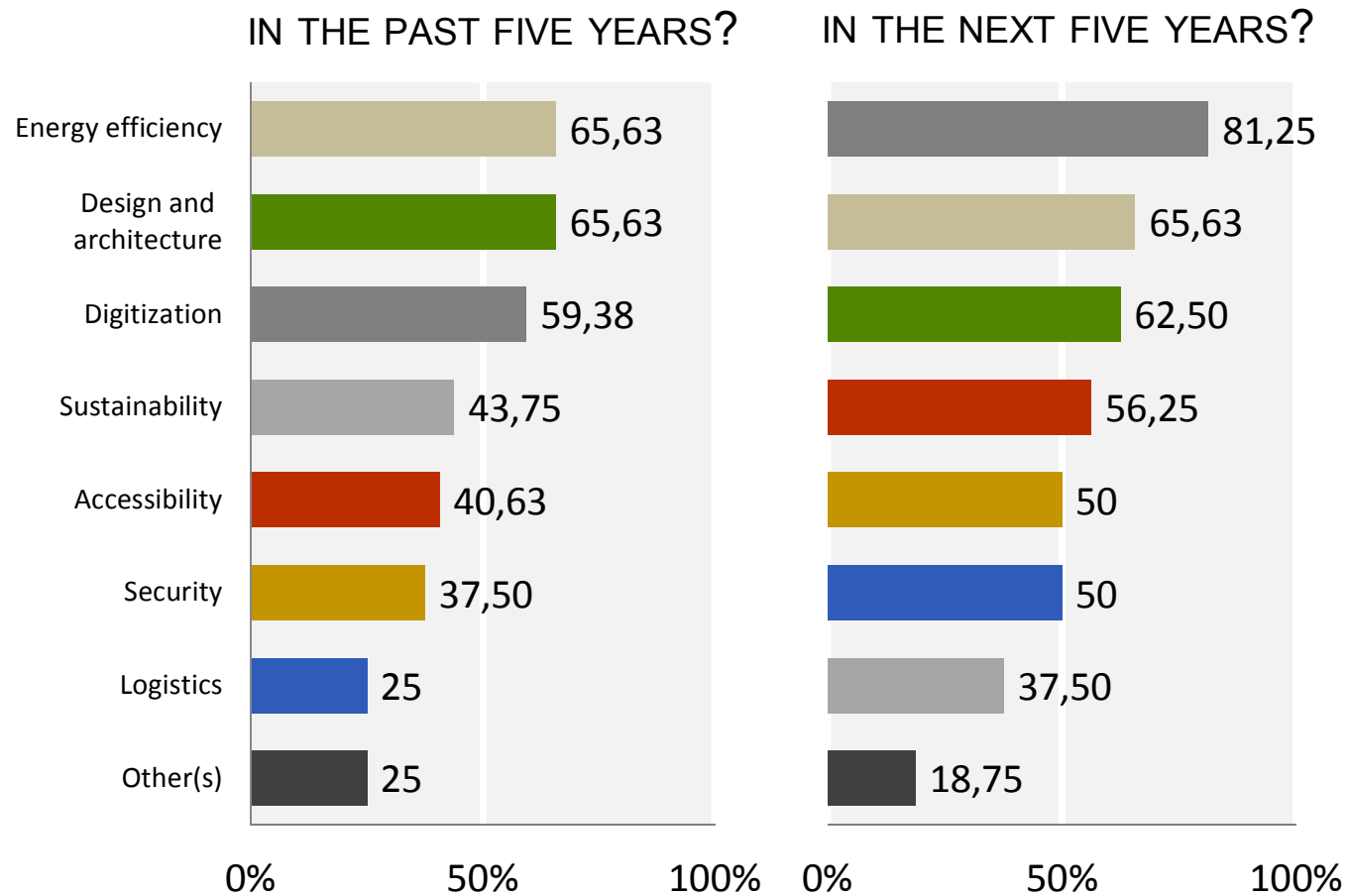
THE
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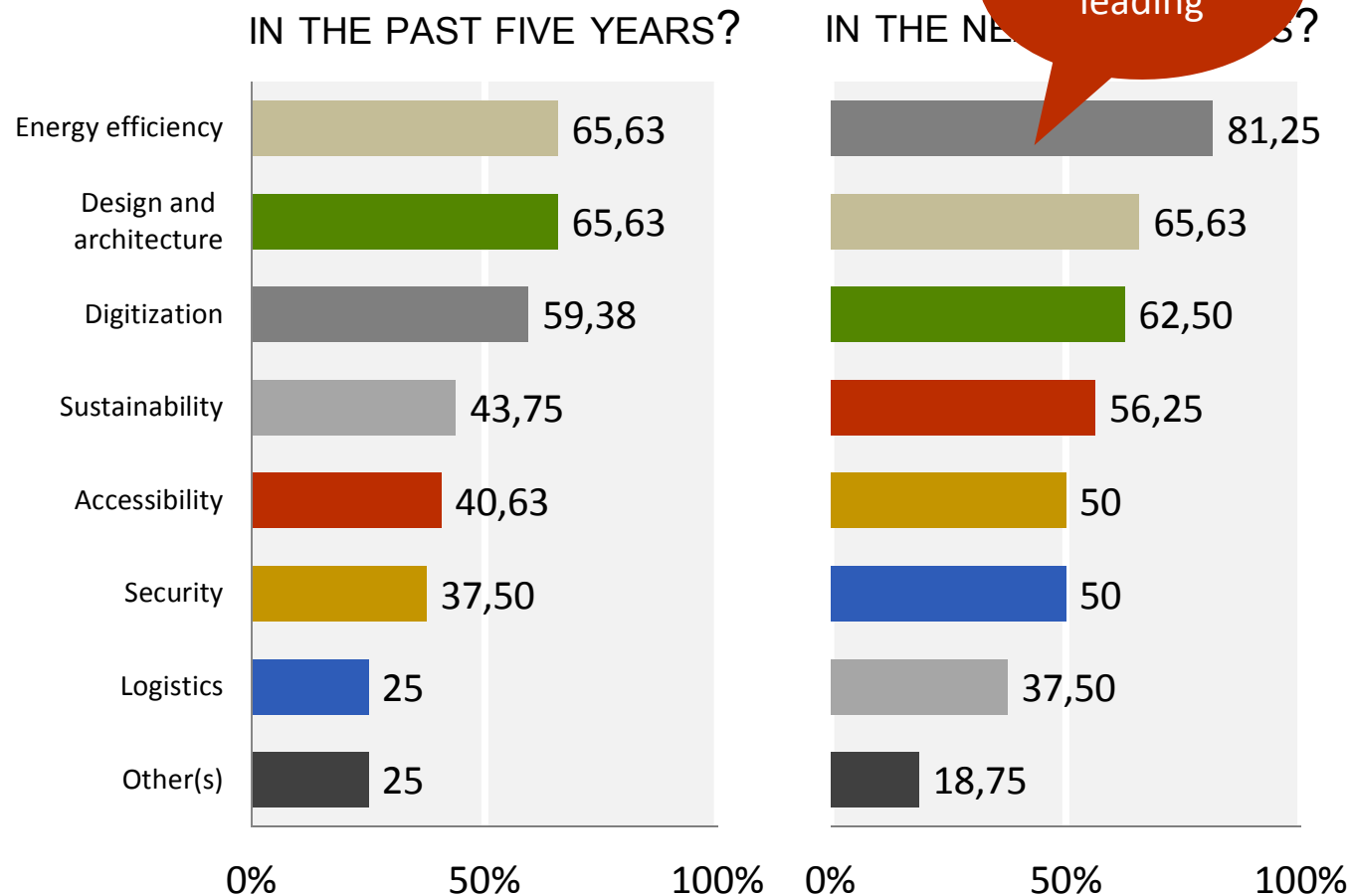
→ Future investment ~ EUR 1,060 billion

→ Total investment ~ EUR 3,676 billion

Q3/Q6: INVESTMENTS IN WHICH AREA

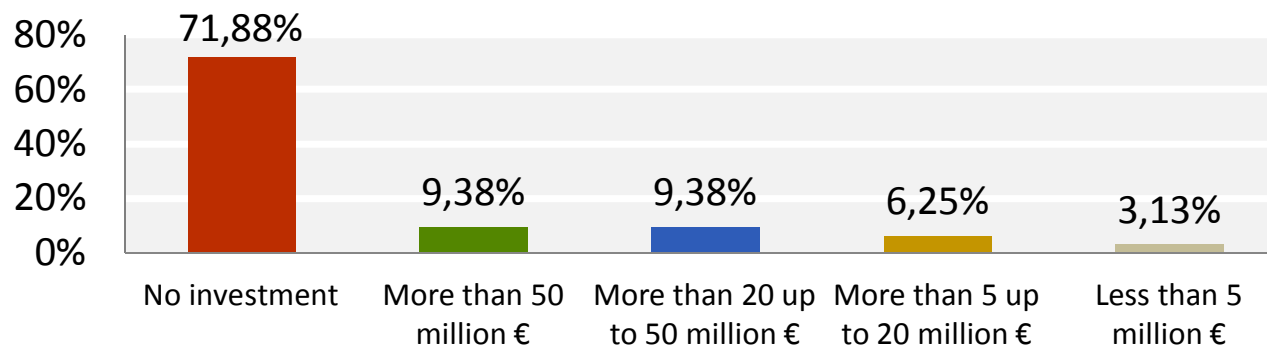


Q3/Q6: INVESTMENTS IN WHICH AREA



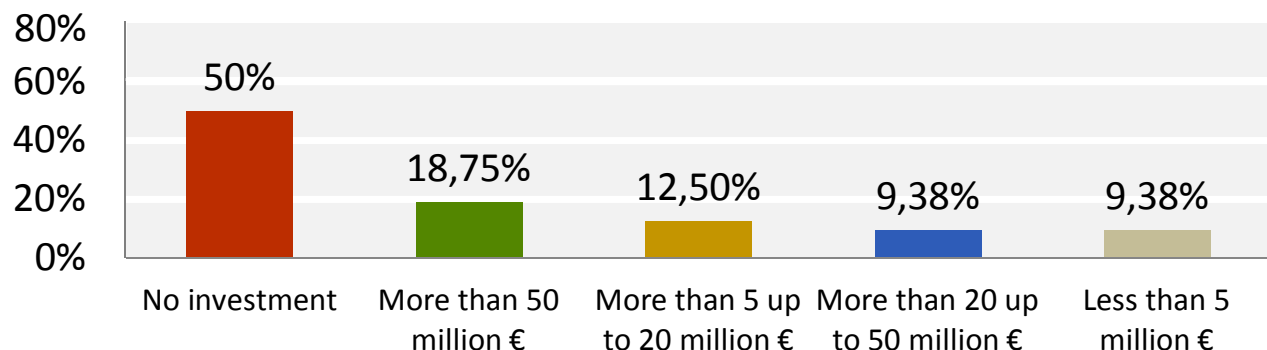
Q4/Q7: HOW MUCH HAVE YOU INVESTED/WILL YOU INVEST INTO THE EXPANSION OF INDOOR EXHIBITION SPACE OF YOUR VENUE INFRASTRUCTURE IN...

THE
PAST
FIVE
YEARS?



→ Past investment ~ EUR 732 million

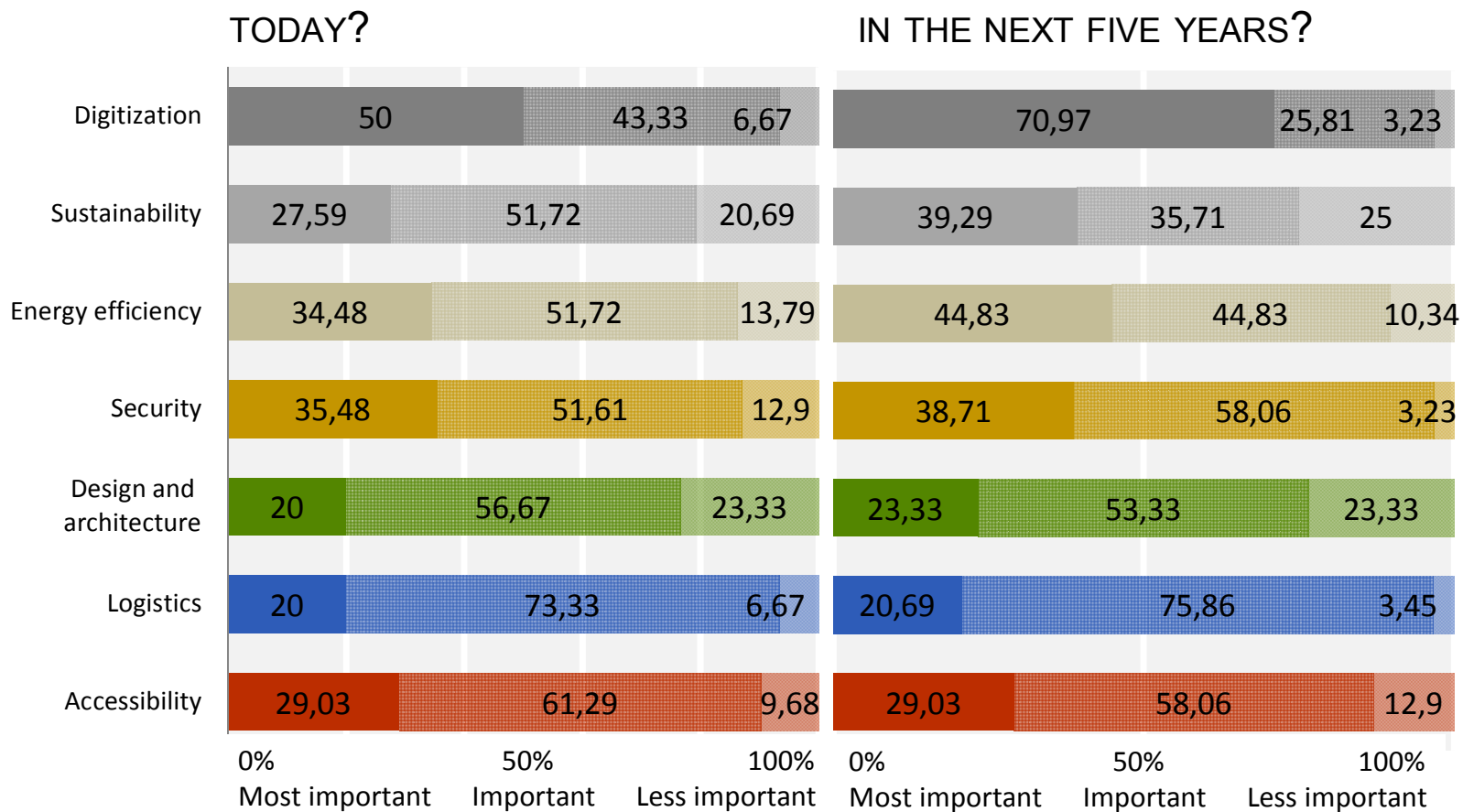
THE
NEXT
FIVE
YEARS?



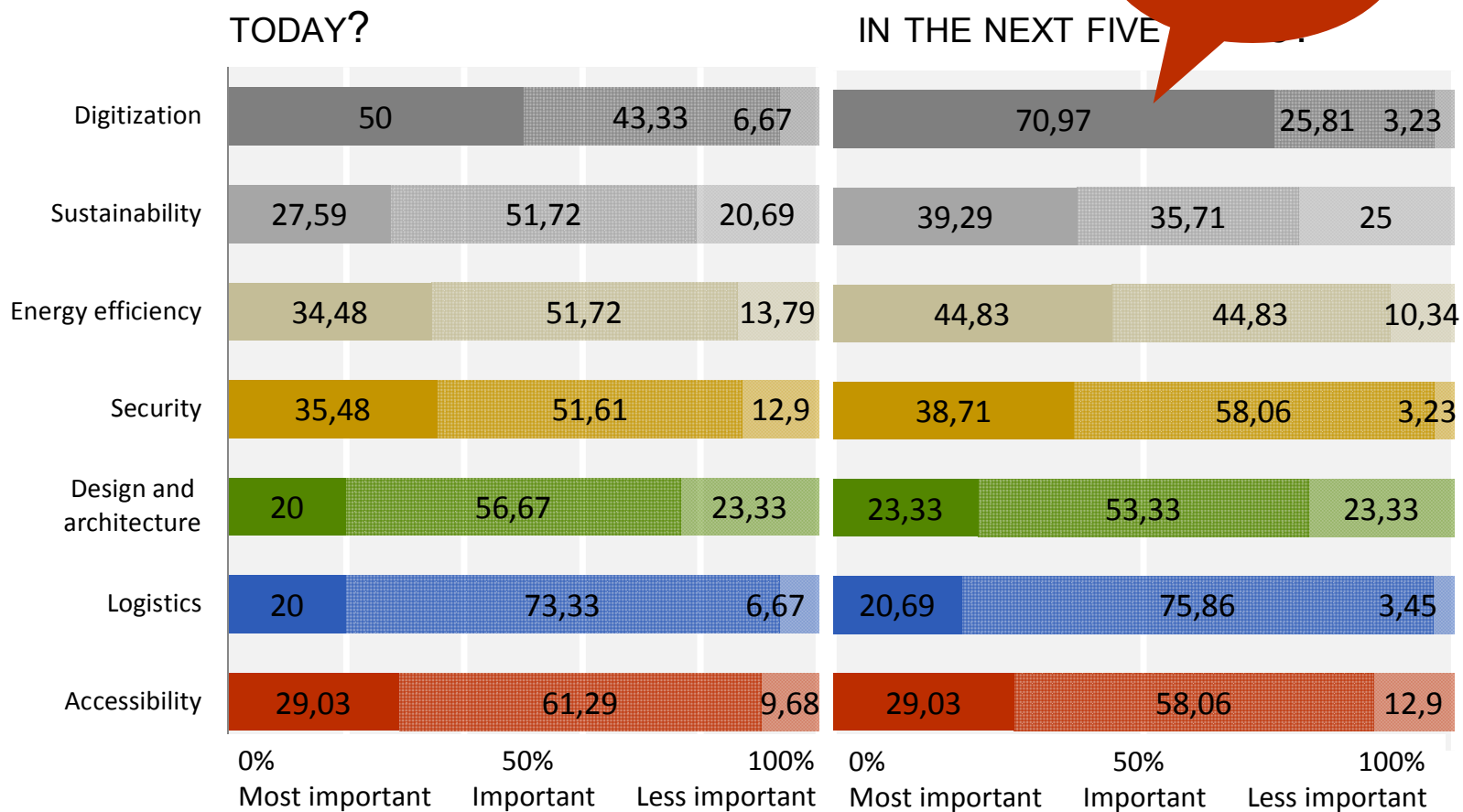
→ Future investment ~ EUR 731 million

→ Total investment ~ EUR 1,463 billion

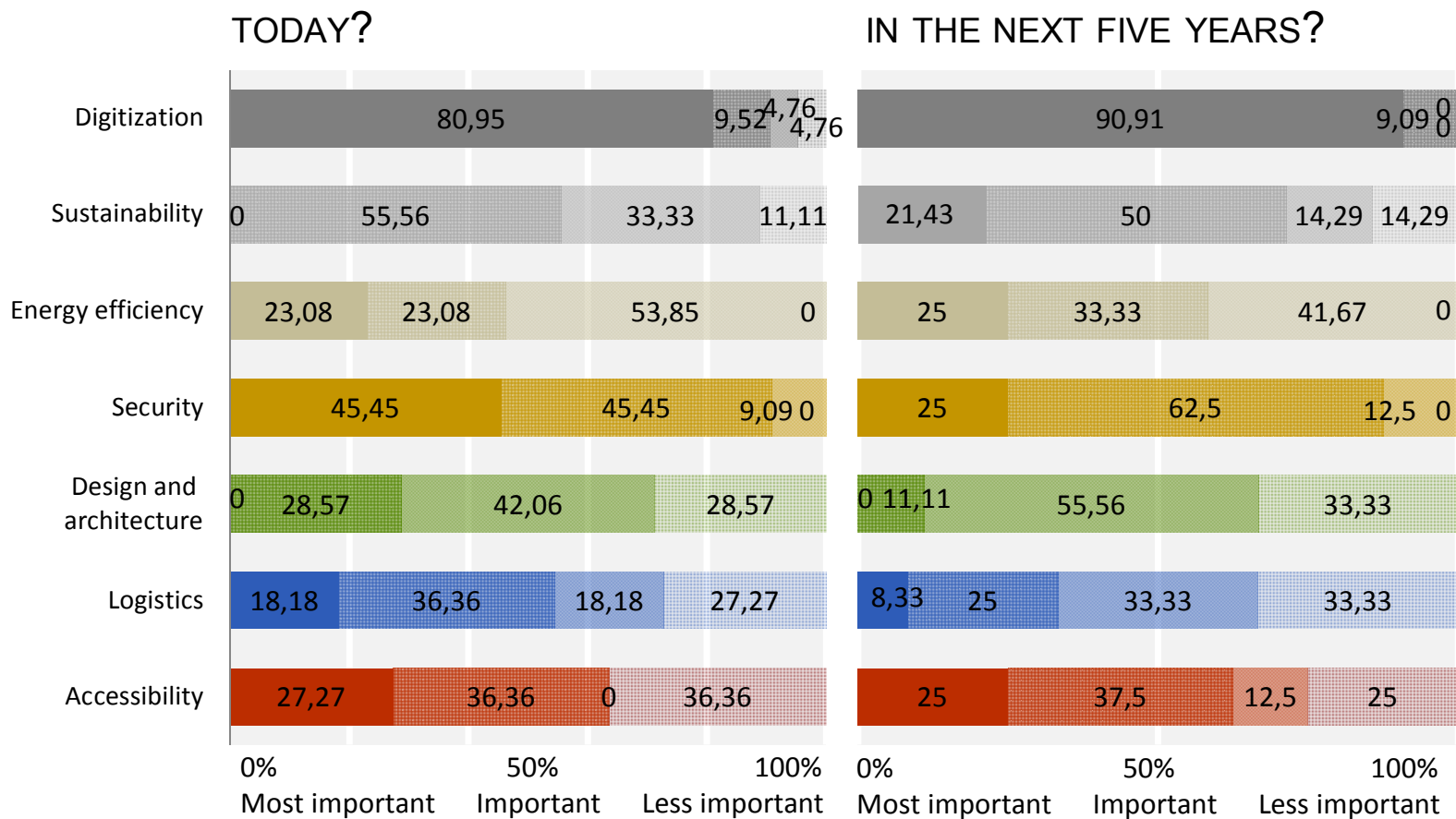
Q8/9: WHAT IS THE MOST IMPORTANT AREA FOR YOU...



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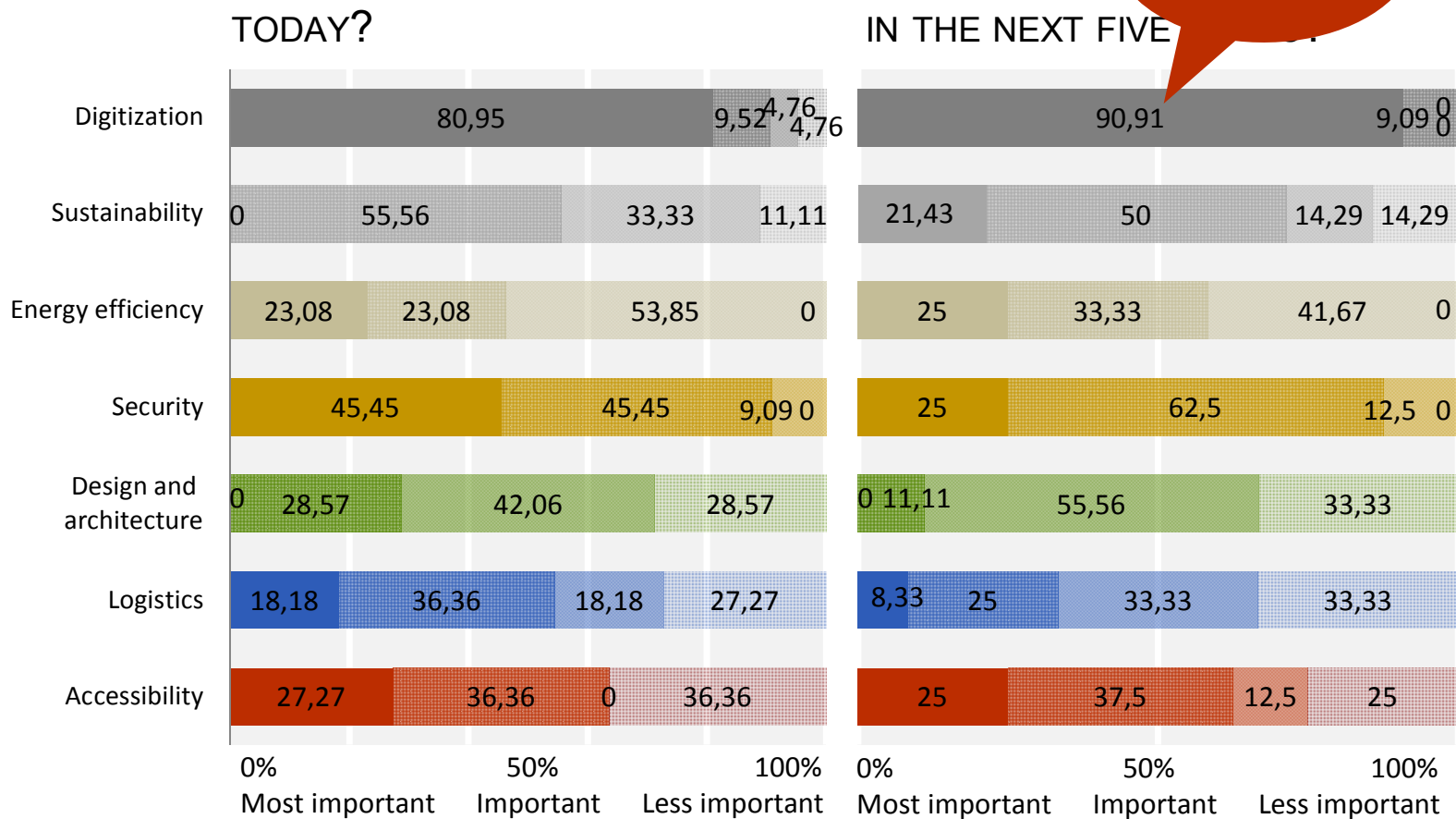


Q10/11: WHAT IS THE MOST CHALLENGING AREA FOR YOU...

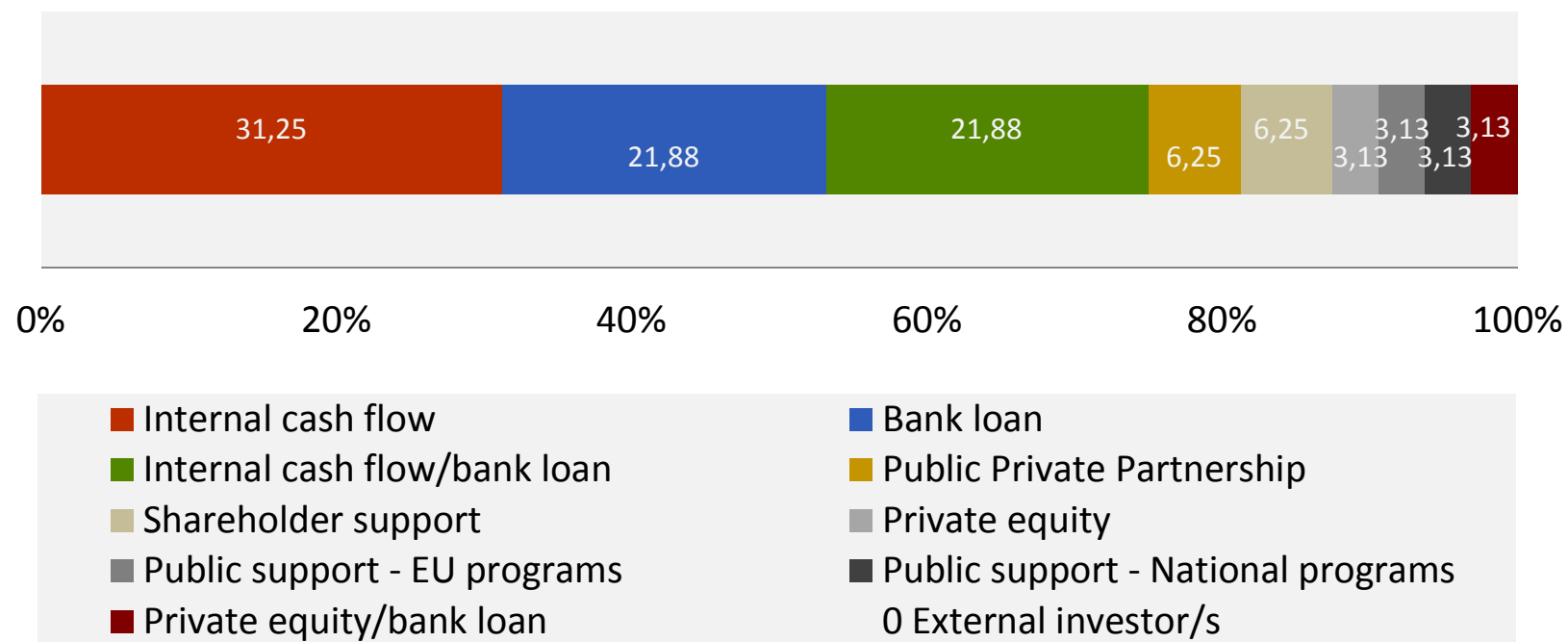


Q10/11: WHAT IS THE MOST CHALLENGING AREA FOR YOU...

Digitization
leading

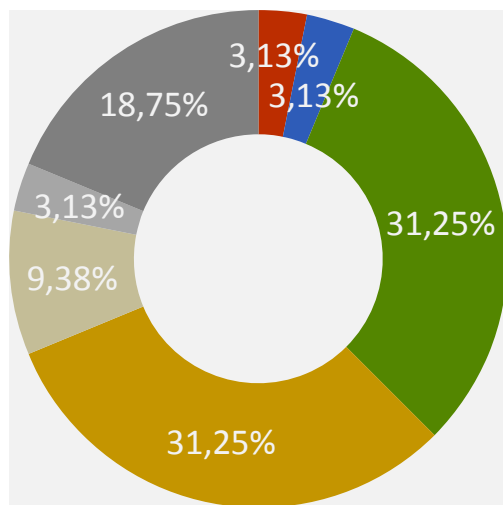


Q14: HOW DO YOU FINANCE YOUR INVESTMENTS?

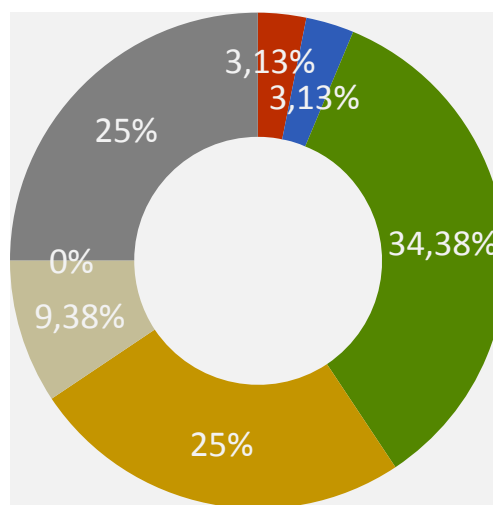


Q15/Q16: INDOOR EXHIBITION SPACE

HOW LARGE
IS YOUR VENUE?



HOW LARGE WILL YOUR
VENUE BE IN FIVE YEARS?



- Less than 10 000 sqm
- 10 001 - 25 000 sqm
- 25 001 - 100 000 sqm
- 100 001 - 150 000 sqm
- 150 001 - 200 000 sqm
- 200 001 - 250 000 sqm
- Over 250 000 sqm



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THANK YOU!

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