# UFI Global Exhibition

# Barometer

The Global Association of the Exhibition Industry

**35th Edition**

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

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|---|---|
| Global | |
| Southern Africa | |
| Australia | |
| Brazil | |
| Italy | |
| United Kingdom | |
| Spain | |
| Asia | |
| Peru | |
| Central & South America | |
| Colombia | |
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| Japan | |
| Macau | |
| Malaysia | |
| Myanmar | |
| Saudi Arabia | |
| Singapore | |
| US | |
| Greece | |
| Thailand | |
| France | |

# UFI Research: An Overview

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**World Map of Venues** – Report on trends in venue space and project developments globally.

**Global Exhibition Industry Statistics** – Key data onglobal and regional markets.

**Economic Impact Study** – Report on the value of exhibitions globally and regionally.

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

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**The Trade Fair Industry in Asia** – Annual analysis of market developments for Asia/Pacific by country.

**The Exhibition Industry in MEA** – Overview of the exhibition market in the MEA region.

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

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الهيئة العامة للمعارض والمؤتمرات
SAUDI CONVENTIONS & EXHIBITIONS GENERAL AUTHORITY

*The Saudi Conventions and Exhibitions General Authority (SCEGA) seeks to enable the growth of the sector through the continual development of regulation and legislation that govern and organize the ecosystem of the industry in order to attract quality exhibitions and conferences, develop local exhibitions and conferences, promote the competitive advantages of the Kingdom, and leverage the sector's contribution to the national economy.*

UFI Research is available at [www.ufi.org/research](http://www.ufi.org/research)

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# Introduction

Welcome to the 35th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey concluded in July 2025. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 19 specific markets and regions. In addition, for the first time, it also includes an analysis of replies by type of activity (organiser, venue or service provider/supplier) for all questions, when relevant.

The UFI Global Exhibition Barometer was launched in response to the 2008 global financial crisis. Since then, it has tracked industry development through various external shocks (the most recent being the COVID-19 pandemic). As a globally trusted, independently run research project, this latest edition again identifies and lists today’s and tomorrow’s industry challenges.

The Barometer has a truly global reach, with 386 companies participating from 58 countries and regions.

We wish to thank the following associations, whose participation made this global collaboration possible: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, ABEA (Australian Business Events Association) in Australia, ABEOC (Associao Brasileira de Empresas de Eventos) and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil, AEFI (Italian Exhibition & Trade Fair Association) in Italy, AEO (Association of Event Organisers) in the UK, AFE (Spanish Trade Fairs Association) in Spain, AFECA (Asian Federation of Exhibition & Convention Associations) in Asia, AFEP (Asociacion de Ferias del Peru) in Peru, AFIDA (Asociación Internacional de Ferias de América) in Central & South America, AIFEC (Asociacion Colombiana de la Industria de Ferias, Congresos, Convenciones y Actividades Afines) in Colombia, AKEI (The Association of Korean Exhibition Industry) in South Korea, AMEREF (Asociacion Mexicana de Recintos Feriales) and AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, AOCA (Asociación Argentina de Organizadores y Proveedores de Exposiciones, Congresos, Eventos y de Burós de Convenciones) in Argentina, APPCE (Asociación Panameña de Profesionales en Congresos, Exposiciones y Afines) in Panama, AUDOCA (Asociación Uruguaya de Organizadores de Congresos y Afines) in Uruguay, HKECIA (Hong Kong Exhibition and Convention Industry Association) in Hong Kong, IECA/ASPERAPI (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair & Trade Association) in Macau, MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia, MECA (Myanmar Exhibition and Conference Association) in Myanmar, PEIFE (Professional Events Industry Association Saudi Arabia) and SCEGA (Saudi Conventions & Exhibitions General Authority) in Saudi Arabia, SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, SOKEE (Greek Exhibition Industry Association) in Greece, TEA (Thai Exhibition Association) in Thailand, and UNIMEV (French Meeting Industry Council) in France.

## Important remarks

- The number of responses to the current survey (386 total from 58 countries and regions - see the full list at the end of the document) provides strong results capturing and describing major issues and trends as a barometer. However, the nature of the exercise – a survey towards a broad sample of companies from the industry - means that some results cannot claim to necessarily be fully representative. Also, since weighting of answers based on the size of the responding company or its national market is not possible, it shall be noted that some regional or global consolidations, especially quantitative results, are not as accurate as the ones for the detailed markets. Whenever felt required, this is mentioned in the texts that accompany the charts.
- Due to decimal rounding, the percentage values indicated in some charts may not sum up exactly to 100%.

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

# Rented Space World

New for the 35th Barometer, we surveyed participants' perception of rented space (net for organisers, gross for venues, and not considering biennial effect), for 2025 compared to 2024, for the country where they are based. Four answer options were proposed: "Increase of more than 5%", "Stable (+/- 5%)", "Decrease of more than 5%" and "I'm not sure / I don't know".

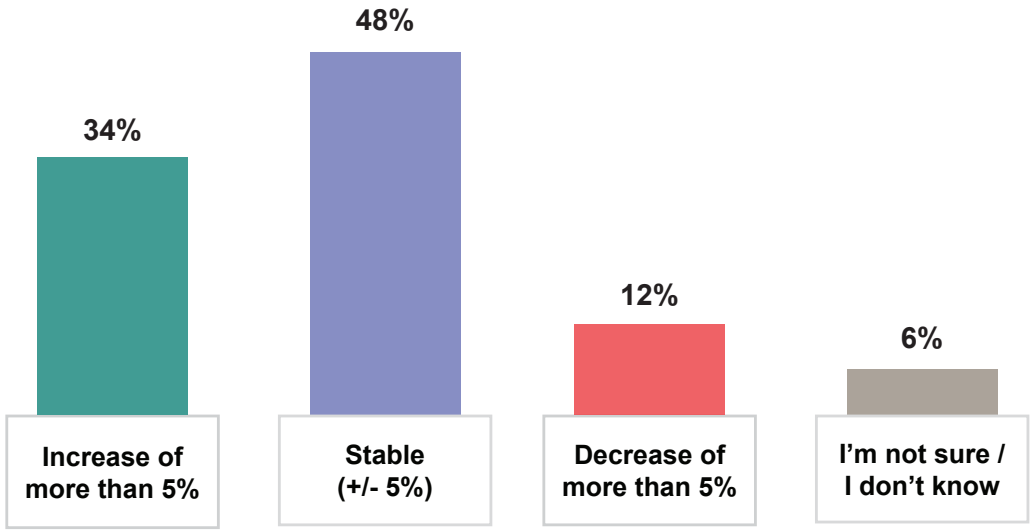
Globally, 34% of respondents expect an increase in activity of more than 5% in their country, while 48% believe it will remain stable (+/-5%). This leaves only 12% expecting a decrease of more than 5%, and 6% are uncertain.

However, detailed results highlight significant differences in most regions:

- In North America, around 6 respondents out of 10 forecast an increase of more than 5% in Mexico, while the same proportion foresees a stable situation (+/- 5%) in the US.
- In Central and South America, around 7 respondents out of 10 forecast an increase of more than 5% in Brazil, while 5 out of 10 in Argentina and 6 out of 10 in Colombia foresee a stable situation.
- In Asia/Pacific, the contrast is even wider. Out of the five markets detailed in the report, there are two where a majority of respondents foresee an increase of activity of more than 5%: India and Malaysia (for respectively 7 and 6 companies out of 10); one with a stable status forecast (Australia, 4 participants out of 10) and two where the majority of respondents plan a decrease of more than 5%: China (55%) and Thailand (40%).

# Rented Space World

## Aggregated Country Forecast 2025 compared to 2024



# Revenues World

The 35th Barometer asked participants for their company's exhibition-related revenues for 2025 compared to the previous year based on different revenue streams: "Renting space (to organiser if venue, to exhibitors if organiser)", "Selling services (to visitors and exhibitors, not including space)", "Selling sponsoring opportunities", and "Receiving subsidies". Five answers were proposed: "Not relevant for my company", "Stable (+/- 5%)", "Increase of more than 5%", "Decrease of more than 5%", and "I don't know / Not available".

**The following charts present:**

- Revenue forecasts on average for all companies, by category.
- The results by type of activity (organiser, venue or service provider/supplier).

Global results indicate that most companies foresee:

- An increase of more than 5% of their revenues in 2025 compared to 2024 for "Renting space" (36% of respondents) and "Selling services" (39%).
- A stable evolution (of +/- 5%) for "Selling sponsoring opportunities" (32% of respondents, while 27% of respondents mention that this revenue stream is not relevant for their company).
- 54% of respondents do not consider "receiving subsidies" relevant to their company. When it is, most anticipate a stable evolution (+/- 5%) of this revenue stream.

Similarly to the previous question related to country revenue forecast, country results to this question indicate significant differences. Countries where most companies anticipate an increase of more than 5% of their 2025 revenues compared to 2024 are:

- Saudi Arabia (80%), the United Arab Emirates (67%), India (62%), Mexico (61%), Argentina (58%) and Colombia (55%) for "Renting space".
- Saudi Arabia (70%), the United Arab Emirates (67%), India (62%), Malaysia (60%), Argentina (58%), Brazil (57%) and Colombia (54%) for "Selling services".

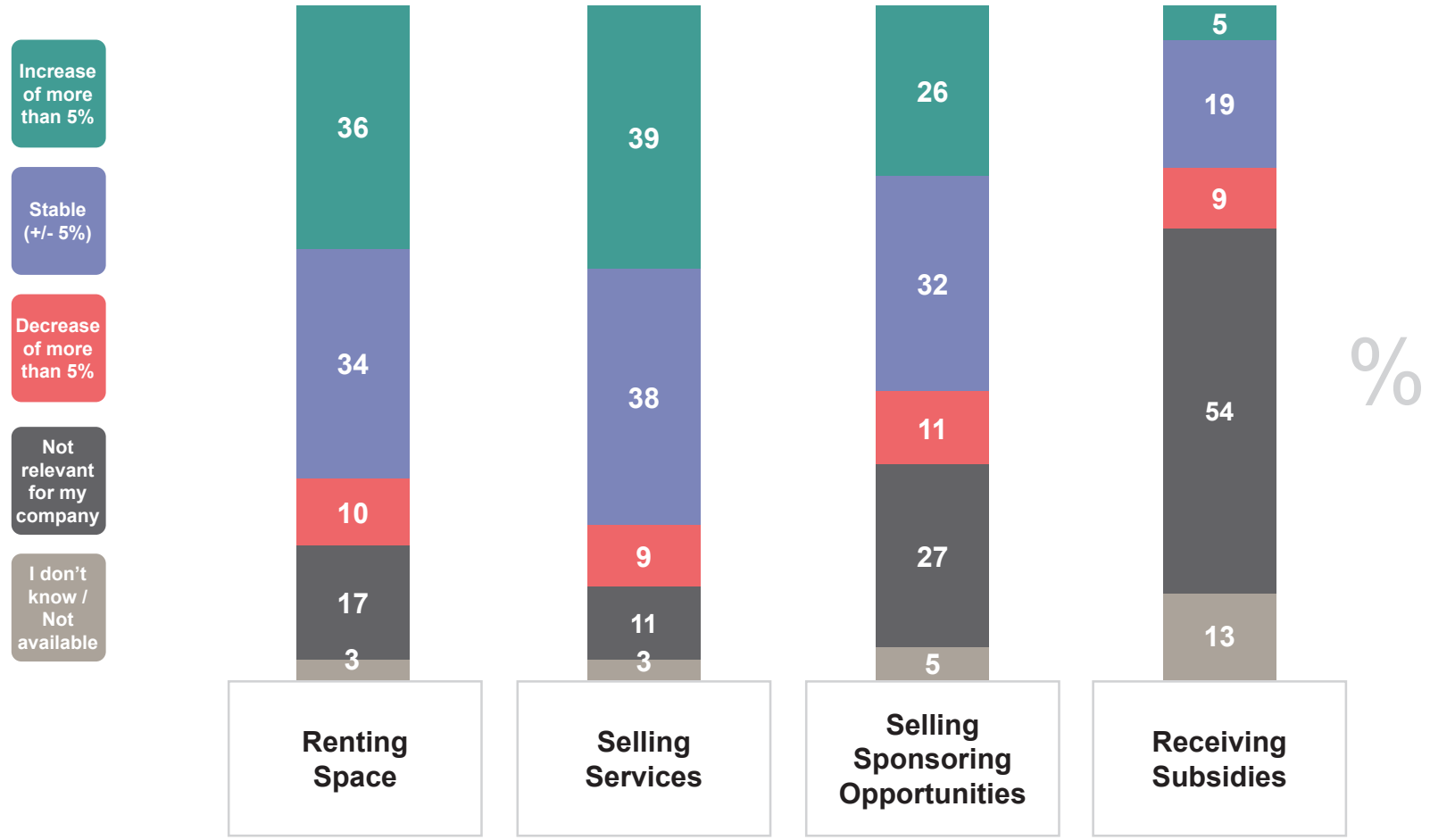
The results by type of activity highlight different forecasts by revenue stream:

- For "Renting space", most organisers (49%) anticipate an increase of more than 5% while most venues or "venues and organisers" anticipate a stable trend (51% for both).
- For "Selling services", most service providers/suppliers (42%) anticipate an increase of more than 5% while most organisers, venues or "venues and organisers" anticipate a stable trend (42%, 44%, 38% respectively).
- For "Selling sponsoring opportunities", most organisers and "organisers and venues" anticipate a stable trend (respectively 39% and 48%), while this revenue channel is "not relevant" for most venues and service providers/suppliers (respectively 55% and 73% of respondents).

For most companies across all segments, "Receiving subsidies" is not relevant. When it is relevant this revenue stream is anticipated to remain stable (+/- 5%) for most companies across all segments.

# Revenues World

## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



# Revenues
# By Type of Activity
# World

## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category

Increase of more than 5%

Stable (+/- 5%)

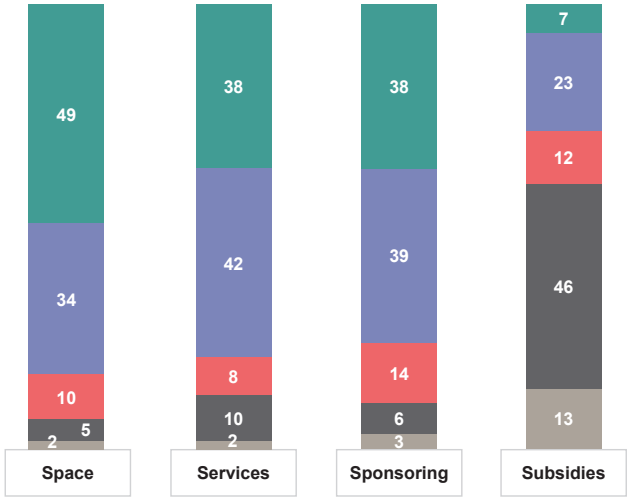
Decrease of more than 5%

Not relevant for my company

I don't know / Not available

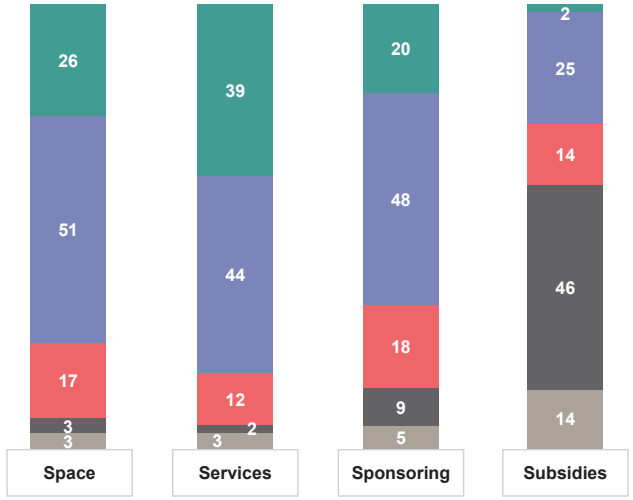
### Organiser only

%



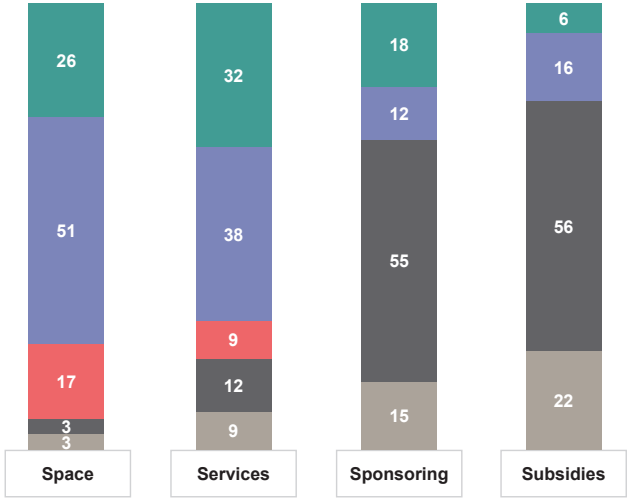

### Venue & Organiser

%



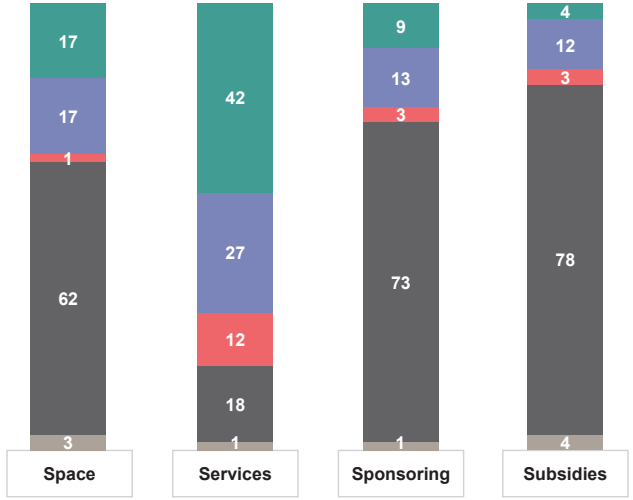

### Venue only

%




### Service Provider / Supplier only

%



# Operating Profit World

The 35th Barometer asked participants how their company's operating profits progressed in 2024 and 2025 compared to the preceding year. Five answer options were proposed: "Increased by more than 10%", "Stable (between -10% and +10%)", "Reduced by 11-50%", "Reduced by more than 50%" and "Loss".

**The following charts present:**

- The evolution of 2024 and 2025 operating profits compared to the previous year respectively.
- The results by type of activity (organiser, venue or service provider/supplier).

In terms of operating profits for 2024, 40% of the companies report an annual increase of more than 10%, and 51% declare a stable result (between -10% and +10%). For 2025, 30% of the companies report an annual increase of more than 10%, and 53% report a stable profit.

Country results show significant differences, and the 5 top markets with the highest proportions of respondents reporting an increase in their operating profit by more than 10% are:

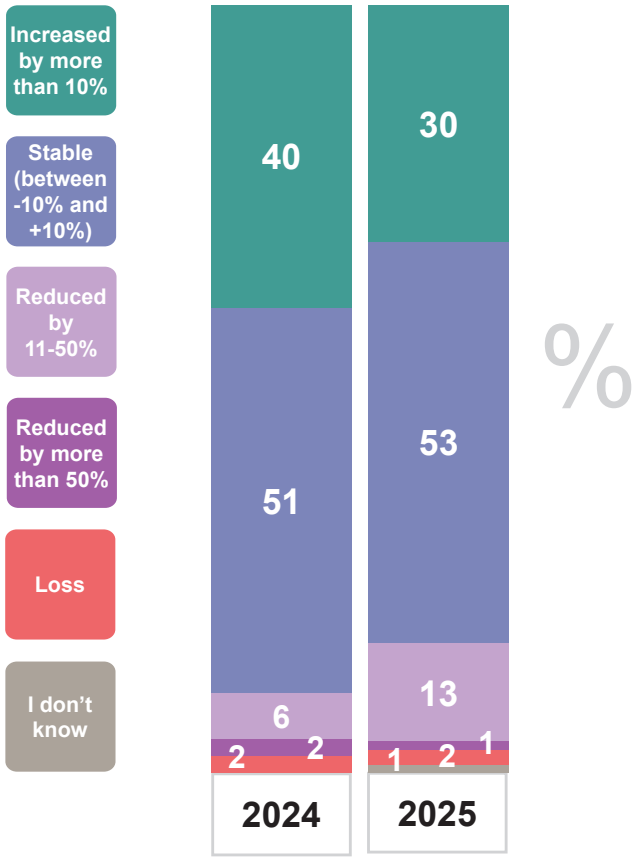
- Mexico (63%), Germany (61%), the UK (53%), the United Arab Emirates and India (both 50%) for 2024.
- And India (64%), the United Arab Emirates (58%), Brazil (43%), Colombia (42%), and Malaysia (40%) for 2025.

Results by type of activity do not show significant differences, and a majority of respondents from all segments (organiser, venue or service provider/supplier) anticipate stable profits (between -10% and +10%) for both 2024 and 2025:

- 50% of organisers, 48% of "venues & organisers", 53% of venues and 53% of service providers/suppliers for 2024
- 53% of organisers, 56% of "venues & organisers", 63% of venues and 47% of service providers/suppliers for 2025.

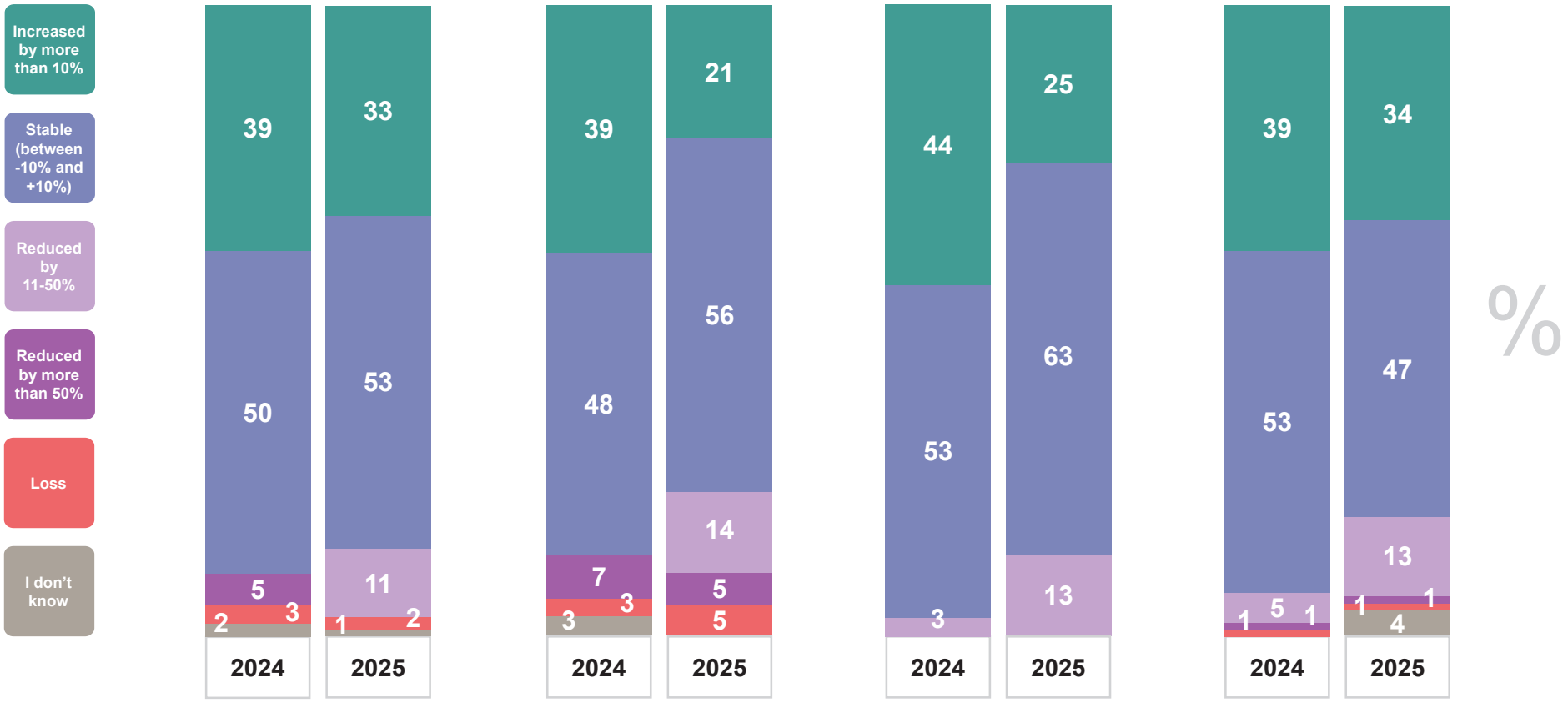
# Operating Profit World

## Operating Profits compared to the previous year



# Operating Profit
# By Type of Activity
# World

## Operating Profits compared to the previous year



# Workforce Development World

The 35th Barometer asked companies about their plans in terms of workforce development in the coming six months.

Globally, 40% of companies declare that they plan to increase their staff numbers, while another 56% declare that they will keep current staff numbers stable.

The highest proportion of companies planning to add staff is identified in Saudi Arabia (80%), Malaysia (70%), Spain (62%), the United Arab Emirates (58%), and India (57%).

At segment level, on average, organisers and service providers/ suppliers are more likely to recruit than venues:

- 43% of both organisers and service providers/suppliers plan to add additional staff, while 54% of organisers and 48% of service providers/suppliers will keep current staff numbers stable.
- 7% of venues plan to add additional staff and 83% to keep current staff numbers stable.

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

# Workforce
# By Type of Activity
# World

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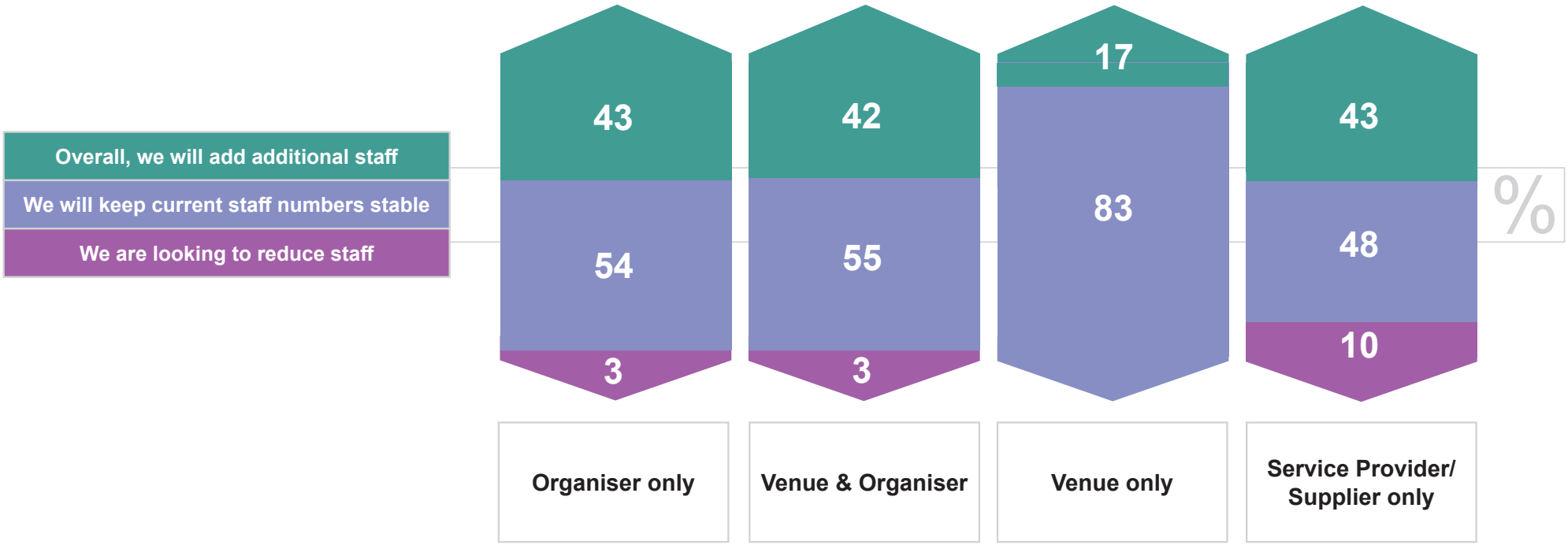
## How do you plan to develop your workforce in the coming 6 months



# Most Important Business Issues World

The 35th Barometer asked companies to select the three most important issues for their business in the short term (12-18 months) and mid-term (3-5 years) from a pre-defined list of ten issues. This list included “Geopolitical challenges” for a second year, while in parallel, the “Impact of COVID-19 pandemic on the business” was removed. The following pages present the results and include an analysis of the trend of answers to the short-term question, which has been asked over more than eight years (whereas the mid-term one is more recent).

**For the short term:**

- The most pressing business issue remains “State of the economy in home market” (19% of answers globally, against 23% six months ago), and it is the main issue in all regions, except the Middle East and Africa, where it ranks second.
- “Geopolitical challenges” (16% of answers, same as six months ago, and the top issue with 18% of answers for the Middle East and Africa) and “Global economic developments” (15%, same as six months ago) come in as the second and third most important issues globally.
- “Internal management challenges” (13%), “Competition from within the exhibition industry” (10%), followed by “Impact of digitalisation”, “Regulatory / Stakeholders issues” (respectively 9% and 7%, both +2% compared to 6 months ago), “Competition with other media” and “Sustainability / Climate” (both 6%) follow.

The analysis of the top 5 global issues by industry segment (organiser, venue and service provider/supplier) shows no differences for the top 2 issues, but the order of the other 3 varies.

The analysis of the trends around top business issues over the 2016 - 2025 period, when combining the previous list into six categories, shows the same positions as six and twelve months ago for the top 2, but changes after:

- “Global economic developments” and “State of the economy in the home market” combined is the main issue, with an aggregated 34% of answers (-4% when compared to six months ago).
- “Geopolitical challenges” remains second, with 16% of answers (same as six months ago)
- “Impact of digitalisation” and “Competition with other media” combined now ranks 3rd, with 15% of answers (+4% compared to six months ago).
- “Internal management challenges” now ranks 4th, with 13% of answers (+1%)
- “Sustainability / Climate” combined with “Other stakeholders’ issues” and “Competition from within the exhibition industry” follow, with 12% and 10% of answers, respectively.

**For the mid-term:**

There are many differences in ranking when comparing the most important issues in the short term versus mid-term:

- The top three issues remain the same, but the first and third have swapped places: “Global economic developments” now is the top mid-term issue with 19% of answers (compared to the short-term issues, where it ranks third with 15%), followed by “Geopolitical challenges” with 15% of answers (compared to 16% for the short term) and “State of the economy in the home market” is third with 12% of answers (compared to the short-term issues, where it ranks first with 19%).
- “Sustainability / Climate” comes to the fourth position for the mid-term (with almost the same level of 12% as the third one), compared to the ninth position on the short term (with only 6% of answers).
- “Competition from within the exhibition industry” (12% of answers), “Impact of digitalisation”, “Competition with other media” and “Internal management challenges” follow (all with 8%), and then “Regulatory stakeholders’ issues” (7%).

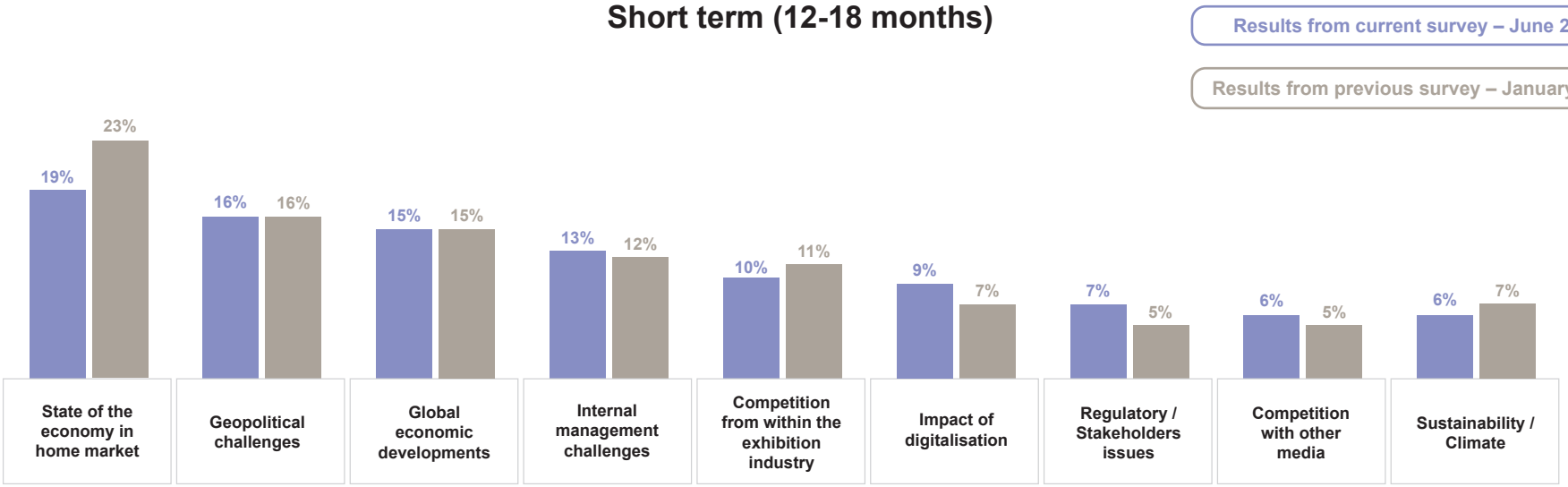
The analysis of the top 5 global issues by industry segment (organiser, venue and service provider/supplier) shows differences:

- Organisers and venues share the same top 2 issues: “Global economic developments” (20% of answers for organisers and 22% for venues) and “Geopolitical challenges” (16% of answers for organisers and 15% for venues).
- But “Sustainability/Climate” is the top priority for “Service providers/suppliers” (15% of answers), followed by “Geopolitical challenges” (13% of answers).

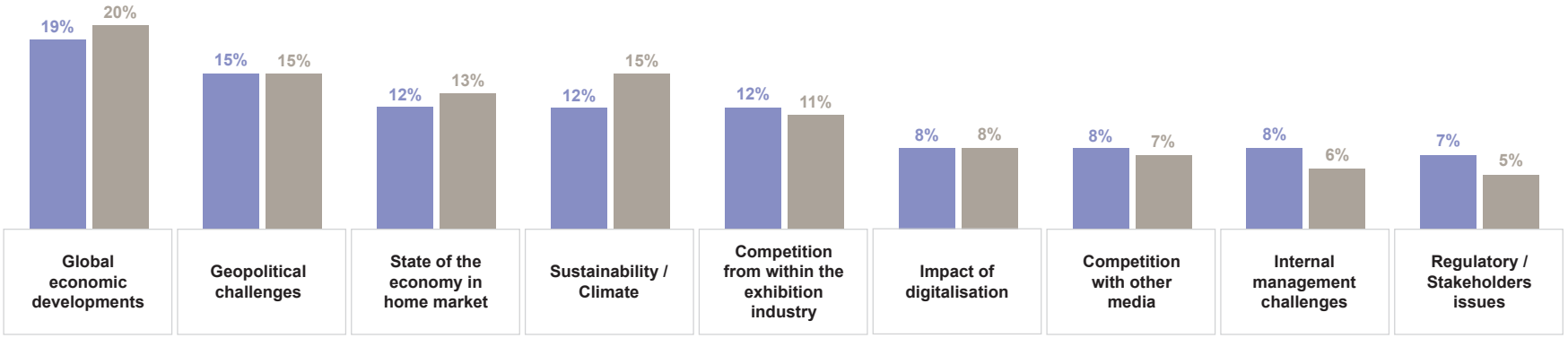
# Most Important Business Issues
# World

The Global Association of the Exhibition Industry

## Short term (12-18 months)



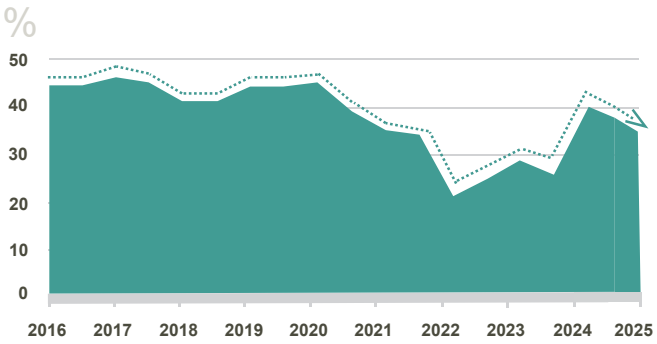

## Mid-term (3-5 years)



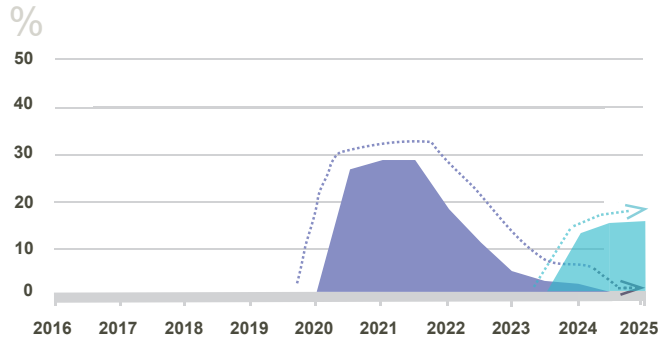
# Most Important Short-Term Business Issues 2016-2025 Trends World

The Global Association of the Exhibition Industry

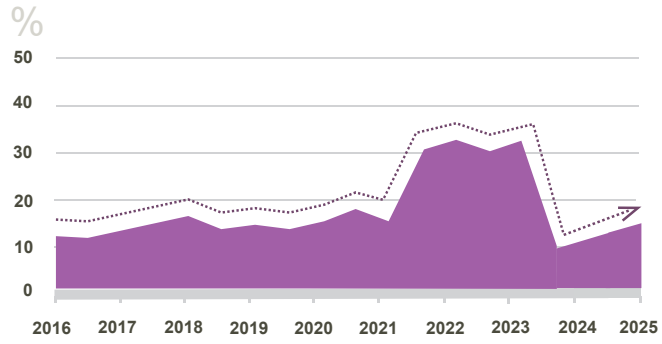
## Global economic developments & State of the economy in home market



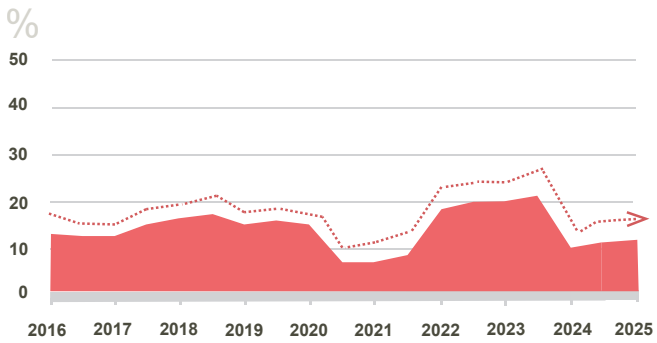

## Impact of Covid-19 pandemic on the business Geopolitical challenges



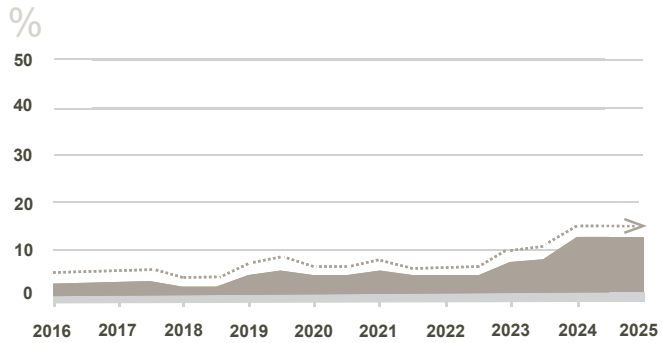

## Impact of digitisation & Competition with other media



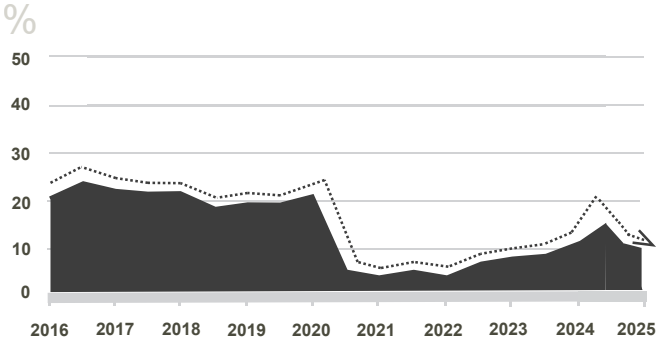

## Internal management challenges




## Sustainability/climate & Other stakeholders issues




## Competition from within the exhibition industry



# Most Important Business Issues By Region and By Type of Activity World

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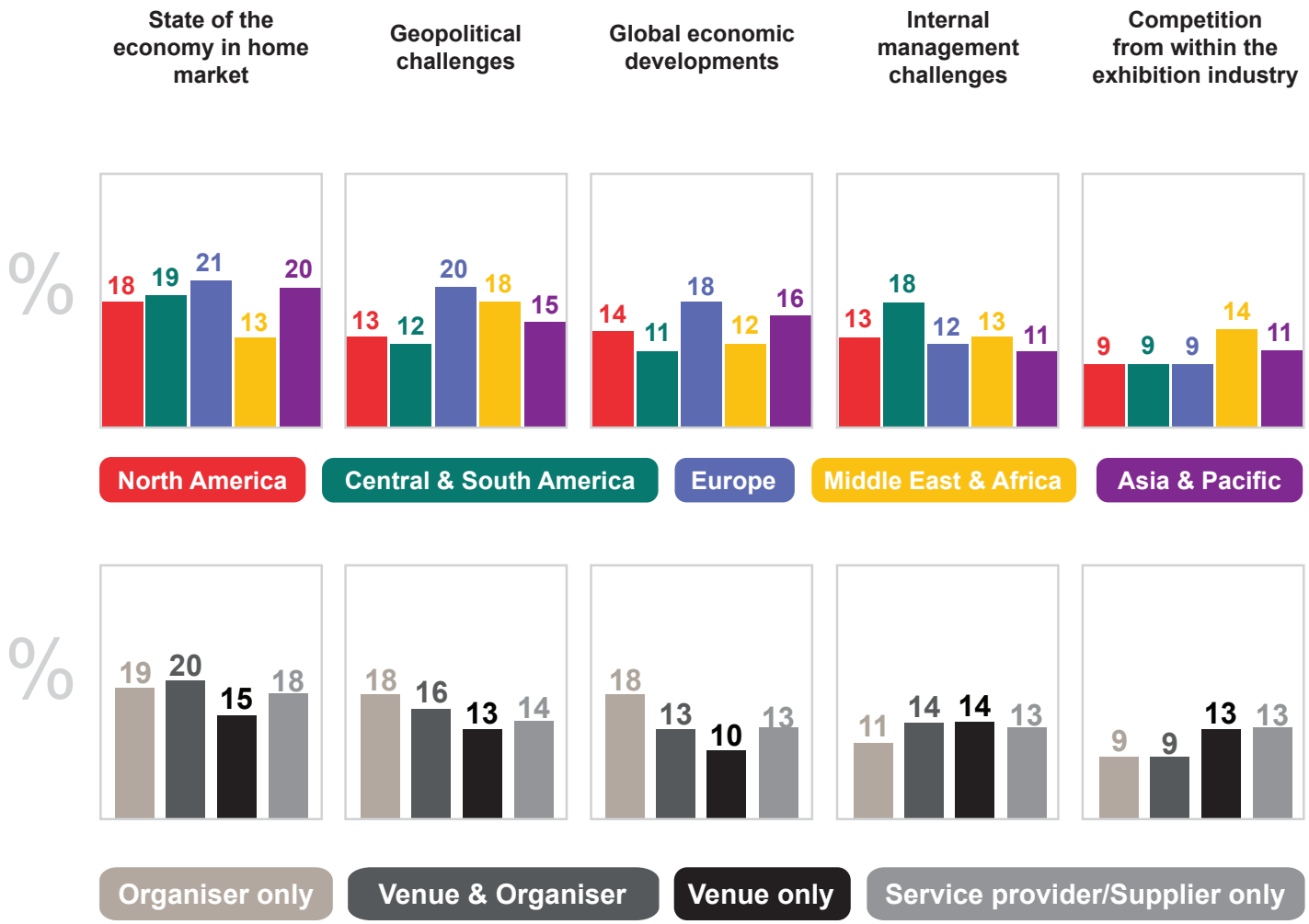
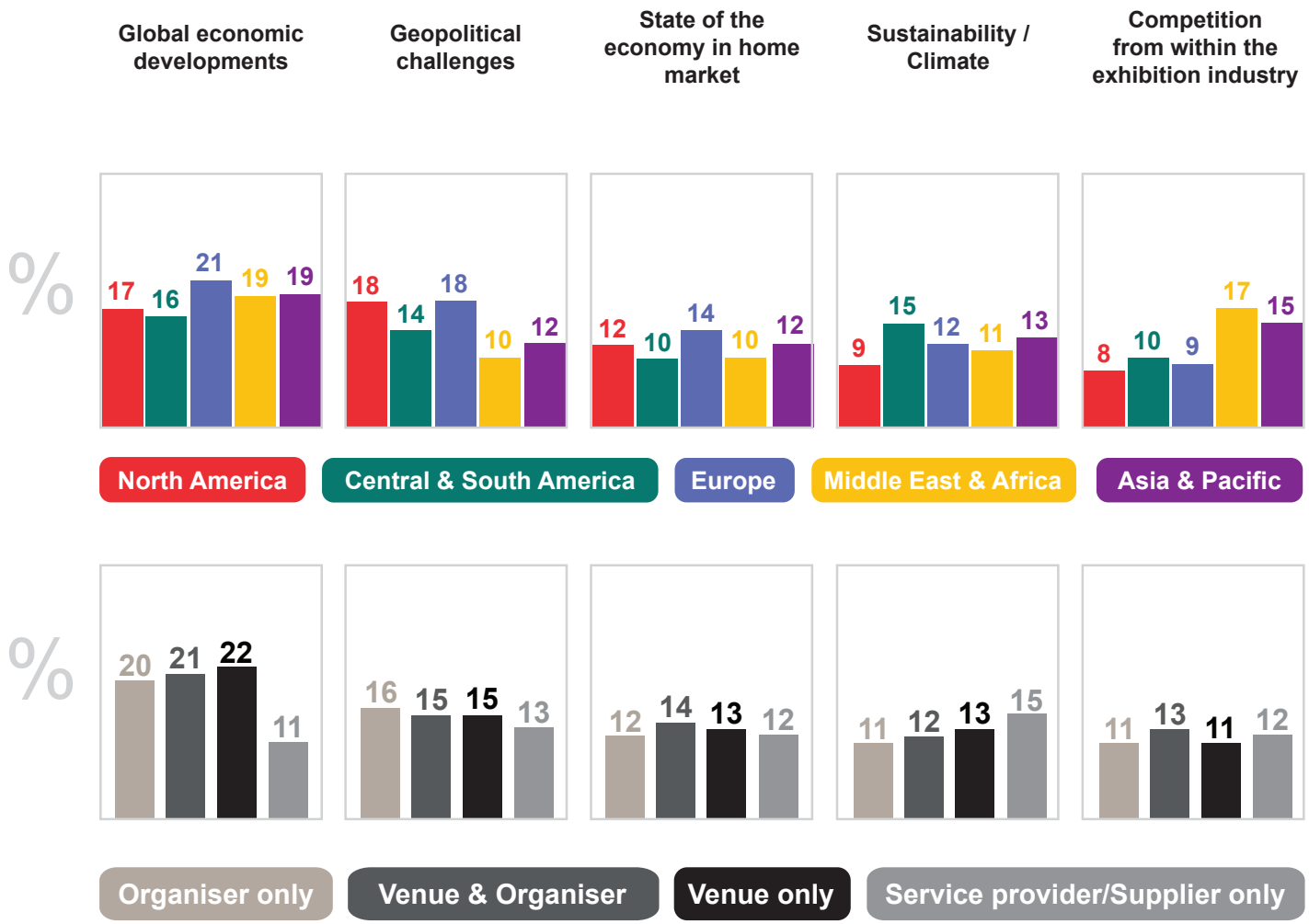
## Short term (12-18 months)



# Most Important Business Issues By Region & By Type of Activity World

The Global Association of the Exhibition Industry

## Mid-term (3-5 years)



# Current Strategic Priorities
# World

Companies were asked to share their current strategic priorities in two specific areas: their range of activities and their geographical exposure.

In all regions, a large majority of companies intend to develop new activities, either in the classic range of exhibition industry activities (venue/organiser/services), outside of the current product portfolios, or in both areas: 78% in Europe, 79% for both Asia-Pacific and the Middle East & Africa, 83% in Central and South America, and 84% in North America.

The analysis by industry segment (organiser, venue and service provider/supplier) shows that:

- Organisers are the ones who primarily plan to develop their activities in line with their current product portfolio (40% of their answers) or consider both developments, also including new activities outside their current product portfolio (22%).
- Service providers/Suppliers are the ones who primarily plan to develop new activities outside their current product portfolio (36%)

In terms of geographic expansion, half of companies report an intention to develop operations in new countries and regions. Half of organisers (51%) report this, while it is higher for service providers/suppliers (62%) and lower for venues (19%).

At the country level, international development is on the agenda of a majority of companies in 10 of the 19 markets analysed: Germany (87%), Colombia (73%), South Africa (71%), the United Arab Emirates (70%), Saudi Arabia (63%), France (56%), Italy (54%), the UK (53%), China (53%) and Mexico (51%).

# Current Strategic Priorities By Region World

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| Key | |
|---|---|
| Develop my activities in line with my current portfolio | Develop new activities and grow existing ones |
| Stay within current scope of activities | Develop new activities outside my current product portfolio |

| North America | |
|---|---|
| 24% | 12% |
| 16% | **47%** |

| Central & South America | |
|---|---|
| 13% | 23% |
| 17% | **46%** |

| Europe | |
|---|---|
| **41%** | 17% |
| 22% | 20% |

| Middle East & Africa | |
|---|---|
| **40%** | 17% |
| 21% | 23% |

| Asia & Pacific | |
|---|---|
| **32%** | 25% |
| 21% | 22% |

# Current Strategic Priorities By Type of Activity World

ufi The Global Association of the Exhibition Industry

## Organiser only

| | |
|---|---|
| Develop my activities in line with my current product portfolio: 40% | Develop new activities and grow existing ones: 22% |
| Stay within current scope of activities: 17% | Develop new activities outside my current product portfolio: 21% |

## Venue & Organiser

| | |
|---|---|
| Develop my activities in line with my current product portfolio: 32% | Develop new activities and grow existing ones: 19% |
| Stay within current scope of activities: 16% | Develop new activities outside my current product portfolio: 33% |

## Venue only

| | |
|---|---|
| Develop my activities in line with my current product portfolio: 24% | Develop new activities and grow existing ones): 15% |
| Stay within current scope of activities: 27% | Develop new activities outside my current product portfolio: 33% |

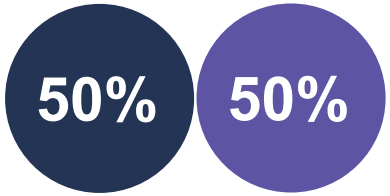
## Service Provider/Supplier only

| | |
|---|---|
| Develop my activities in line with my current product portfolio: 20% | Develop new activities and grow existing ones: 16% |
| Stay within current scope of activities: 28% | Develop new activities outside my current product portfolio: 36% |

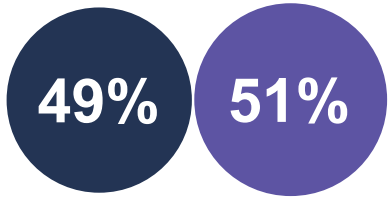
# Current Strategic Priorities By Geographic Exposure World

The Global Association of the Exhibition Industry

## North America



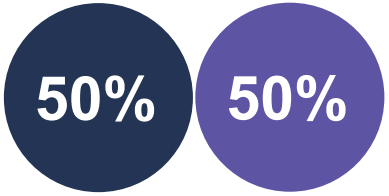

## Central & South America



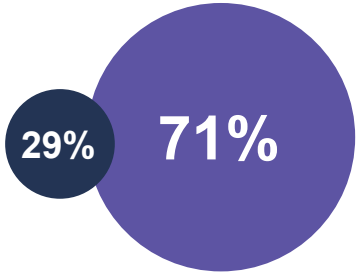

Stay in the same countries as those in which I currently operate

Operate in new countries

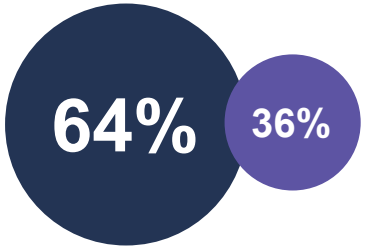
## Europe




## Middle East & Africa




## Asia & Pacific

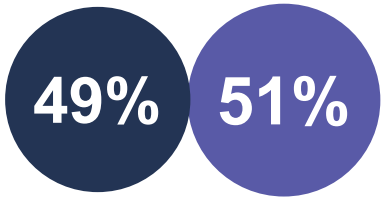


# Current Strategic Priorities
# By Activity Type
# World

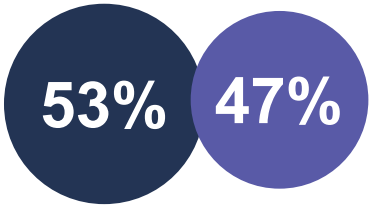
Stay in the same countries as those in which I currently operate

Operate in new countries

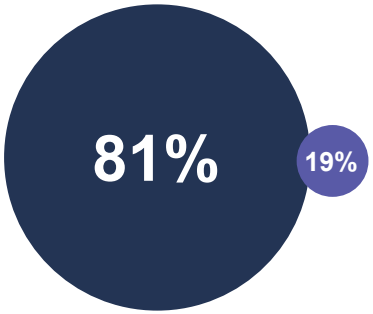
## Organiser Only



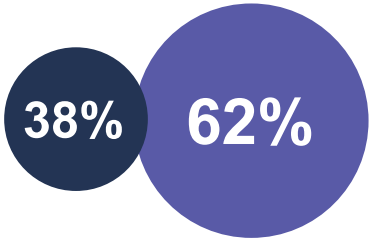

## Venue & Organiser




## Venue only




## Service Provider/Supplier only



# AI Implementation & Maturity World

The 35th Barometer asked participants to assess their current level of AI implementation based on the following answer options: “None or almost none”, “We use standard tools (ChatGPT, Google Gemini, Microsoft Copilot, Midjourney, etc.) on a regular basis”, “We have AI-powered tools integrated into our existing platforms” or “We have implemented our own algorithms trained with our data”.

It also asked for their level of maturity in using AI powered products to improve company and process efficiency, improving customer experience, and generating revenue (“None”, “Researching”, “Testing” or “Implemented”).

Globally, 63% of companies indicate that they currently use standard AI tools (such as ChatGPT, Google Gemini, or similar) in at least some of their business functions. In addition, 17% have AI-powered tools integrated into their existing systems, and 3% have already developed proprietary algorithms trained on internal data. In parallel, 17% of respondents declare having no or almost no use of AI at this stage.

The 5 countries with the highest proportion of respondents who reached either of the last two levels of advancement (implemented their own algorithms trained with company data or AI-powered tools integrated into their platforms) are Thailand (44%), the UK (39%), the United Arab Emirates (38%), the USA (33%) and Saudi Arabia (30%).

At segment level, on average, organisers appear more advanced than service providers/suppliers or venues:

- 12% of organisers, 21% of service providers/suppliers and 34% of venues declare a low or non-existent level of implementation.
- 24% of organisers, 19% of service providers/suppliers and 17% of venues declare already reaching either implementation of their own algorithms trained with company data or AI-powered tools integrated into their platforms.

In terms of their level of maturity, most companies are still researching or testing solutions in the 3 domains surveyed:

- 72% towards “improving company and process efficiency”
- 68% towards “improving customer experience”
- 54% towards “generating revenues using AI-powered products”.

The 5 countries with the highest rates of companies declaring either testing or implementing AI solutions are:

- Thailand (88%), Germany (74%), Malaysia (70%), Brazil (64%) and France (64%) for “improving company and process efficiency”
- China (68%), Argentina (64%), Thailand (63%), the United Arab Emirates (61%) and France (58%) for “improving customer experience”
- Colombia (45%), the United Arab Emirates (39%), Thailand (38%), China (37%) and France (36%) for “generating revenues using AI-powered products”.

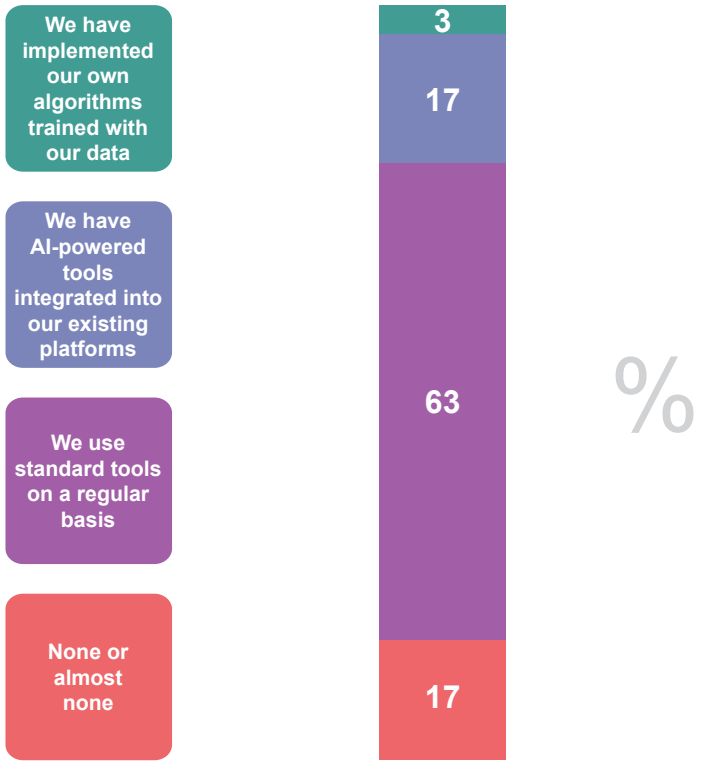
At segment level, the proportion of companies declaring either testing or implementing AI solutions is:

- 61% for service providers/suppliers, 56% for organisers, and 30% for venues towards “improving company and process efficiency”.
- 58% for organisers, 37% for service providers/suppliers and 21% for venues towards “improving customer experience”.
- 28% for organisers, 19% for service providers/suppliers and 0% for venues towards “generating revenues using AI-powered products”.

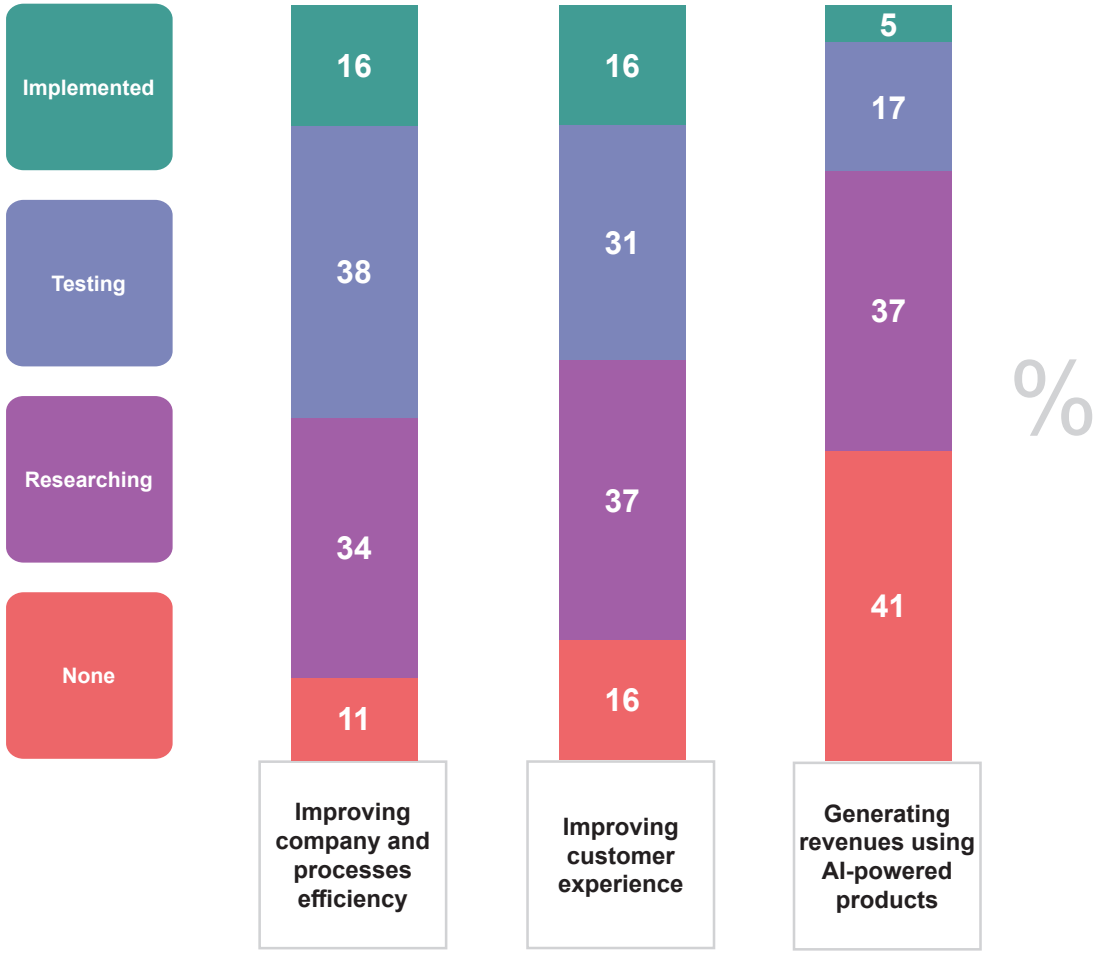
# AI Implementation & Maturity World

The Global Association of the Exhibition Industry

## Level of Implementation

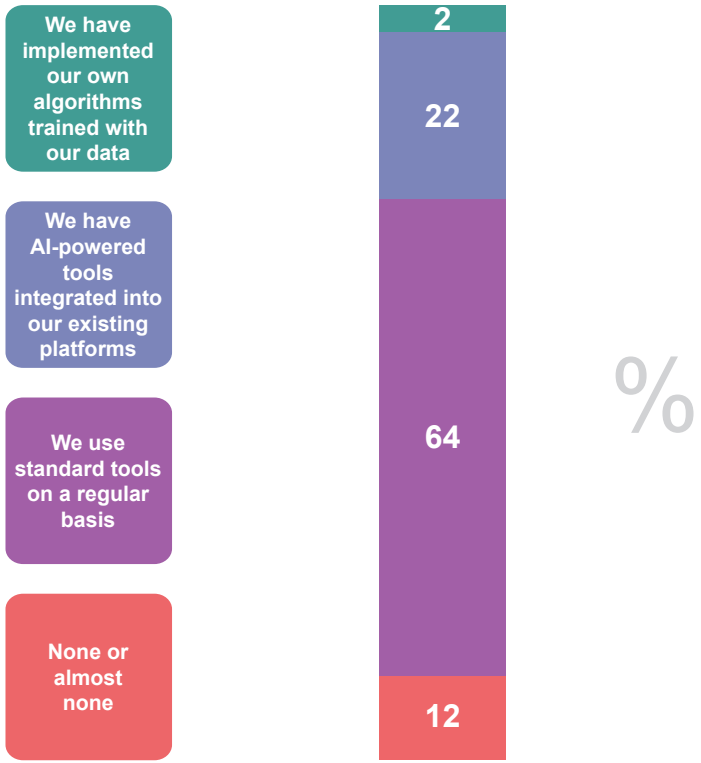



## Level of Maturity

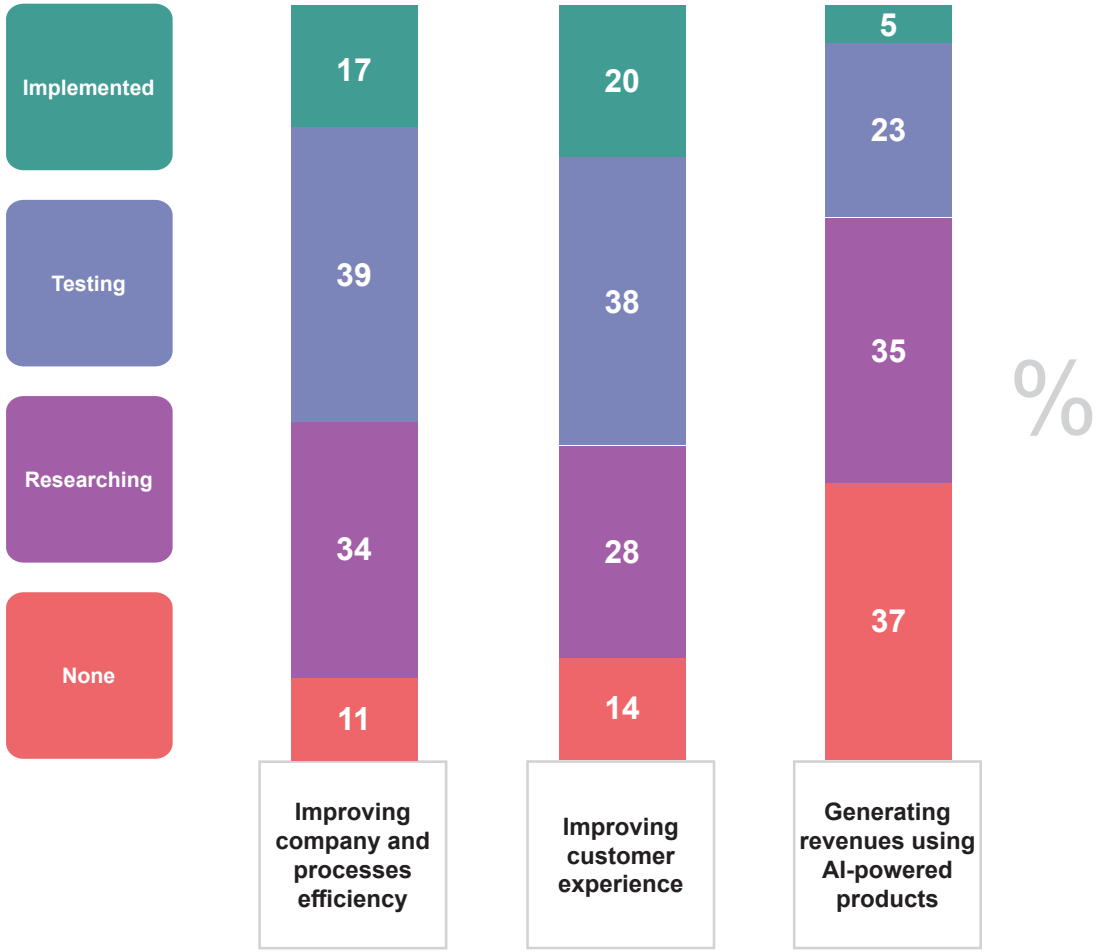


## Organiser Only

### Level of Implementation

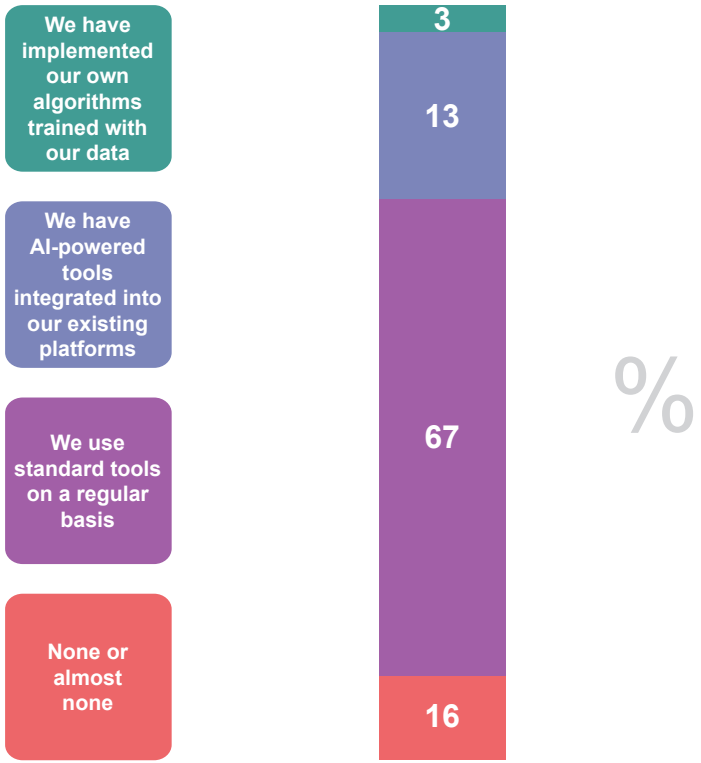



### Level of Maturity

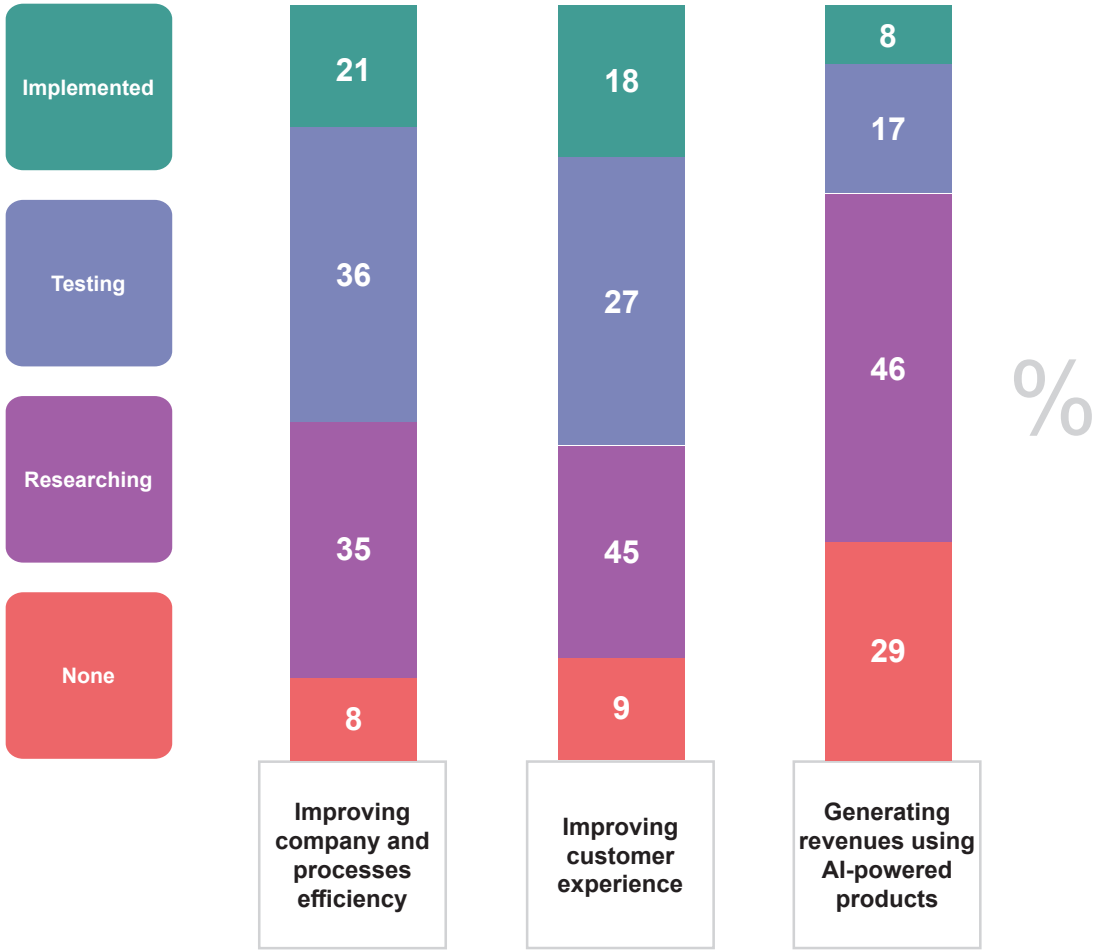


## Venue & Organiser

### Level of Implementation



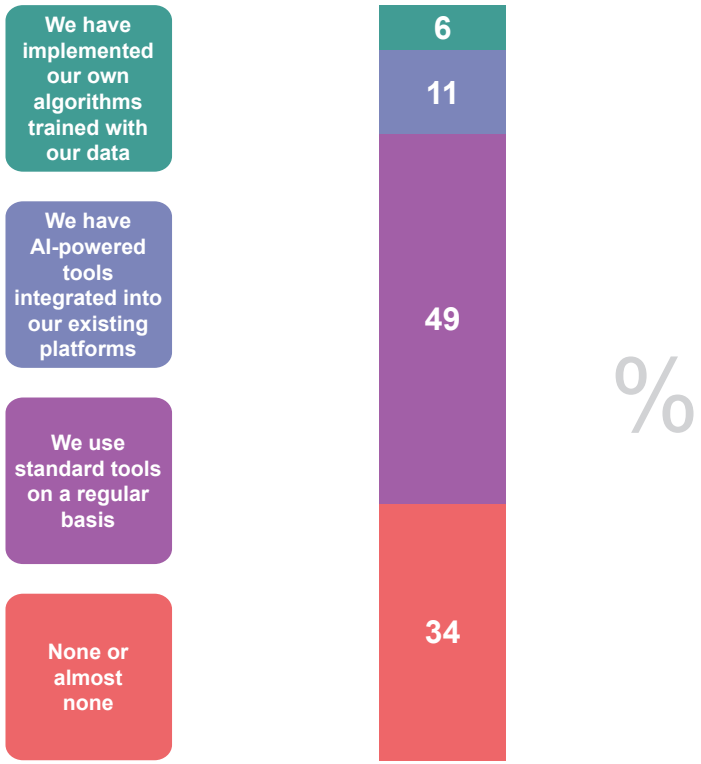

### Level of Maturity



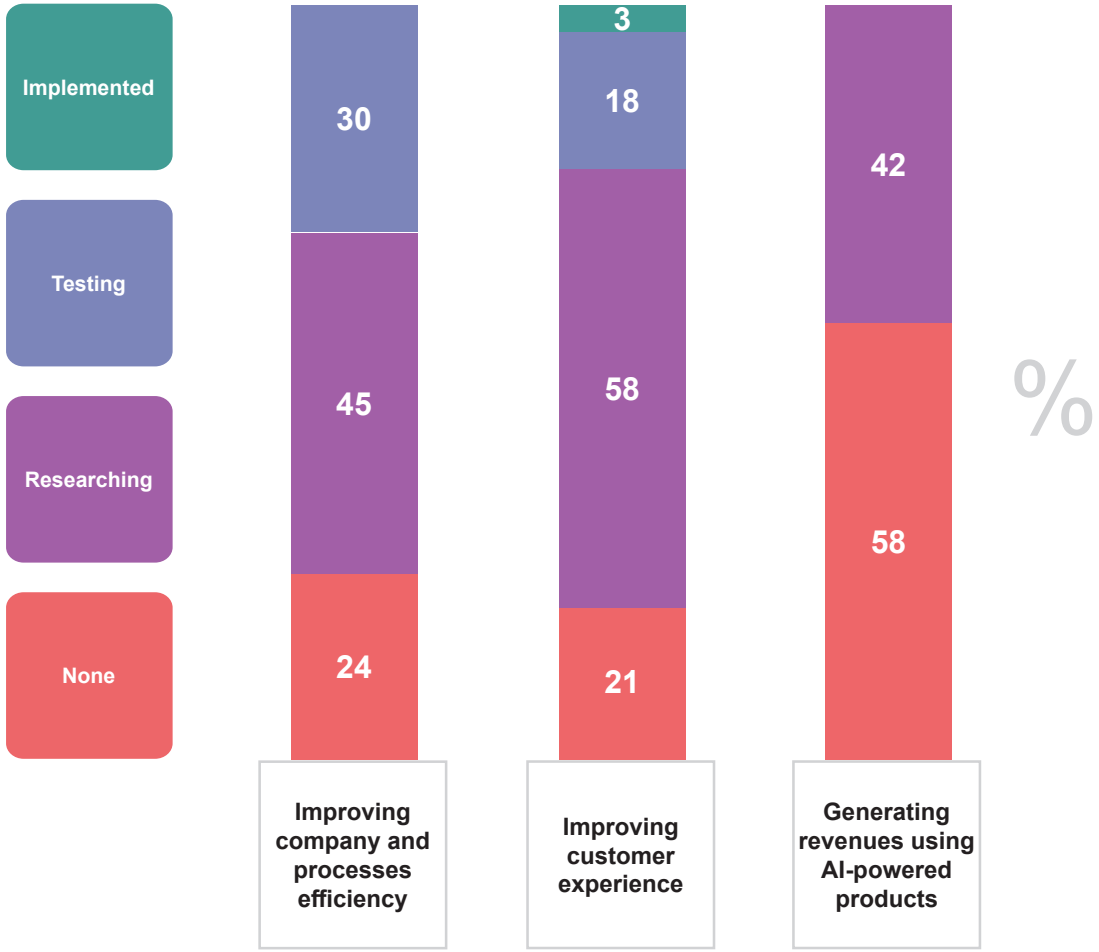
# AI Implementation & Maturity World

## Venue Only

### Level of Implementation



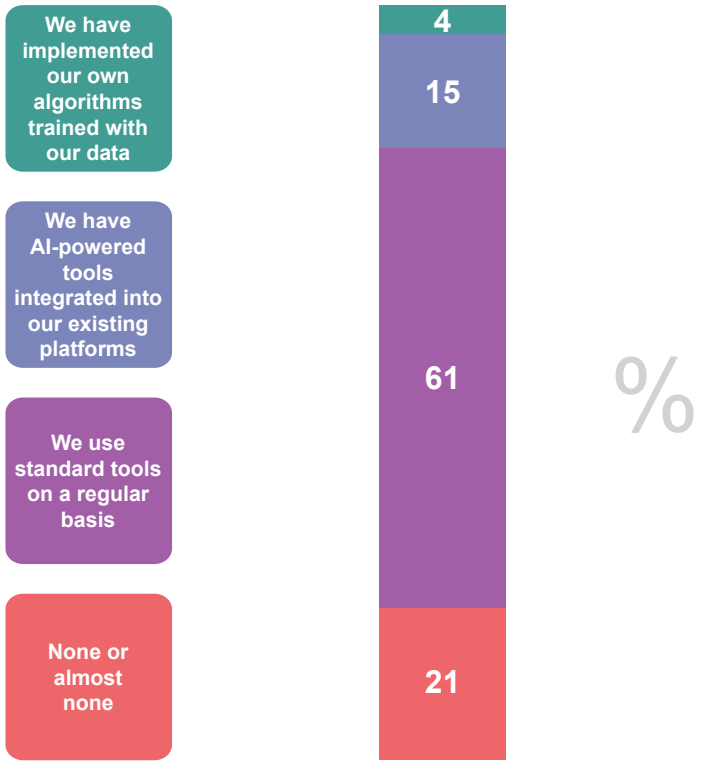

### Level of Maturity



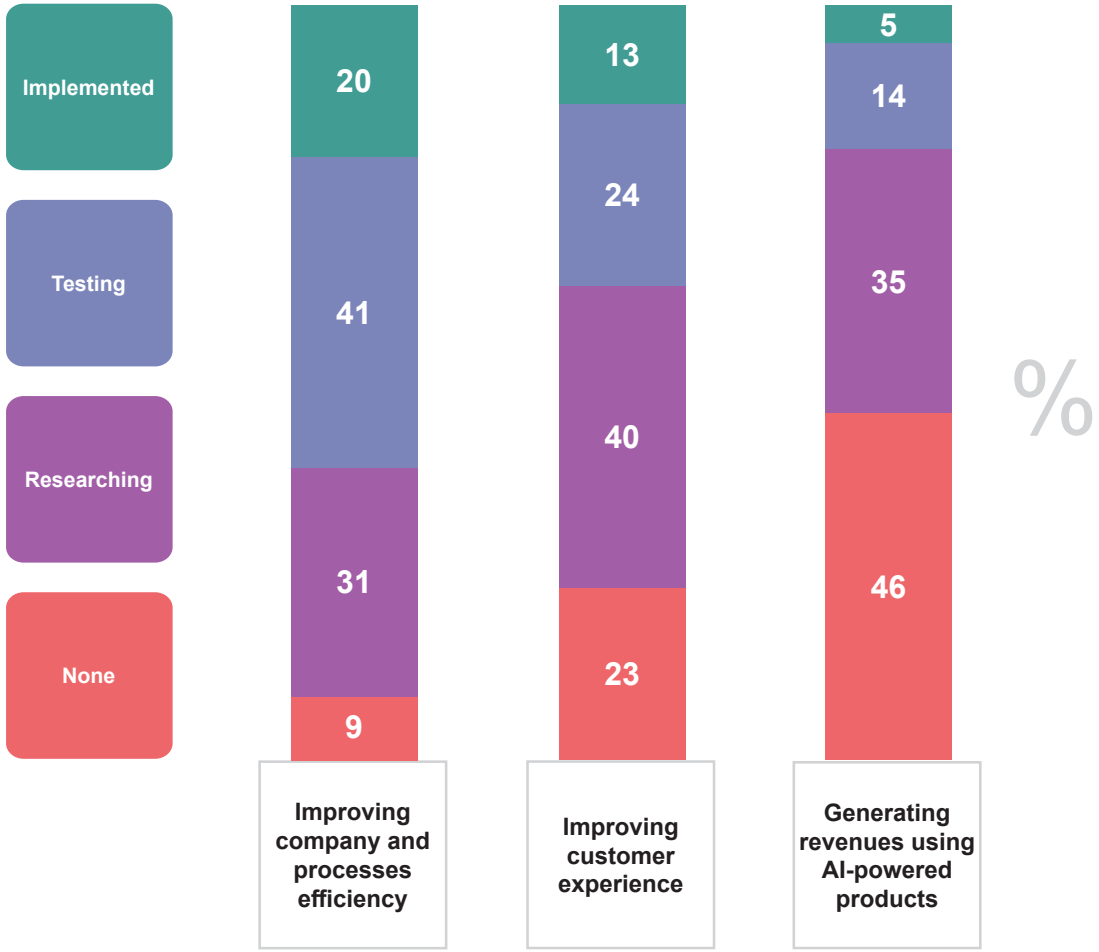
# AI Implementation & Maturity World

## Service Provider/Supplier Only

### Level of Implementation




### Level of Maturity



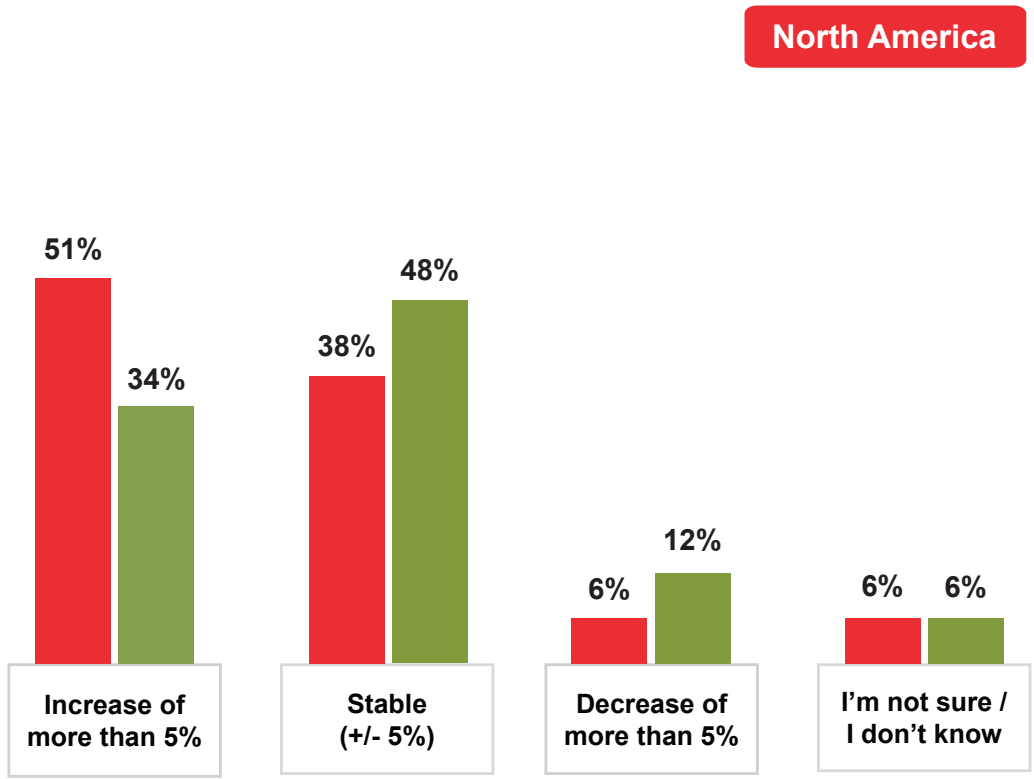
# Part 2:
# Detailed Results for 5 Regions and 19 Markets

| | |
|---|---|
| North America: | Mexico<br>US |
| Central & South America: | Argentina<br>Brazil<br>Colombia |
| Europe: | France<br>Germany<br>Greece<br>Italy<br>Spain<br>United Kingdom |
| Middle East & Africa: | Saudi Arabia<br>UAE<br>South Africa |
| Asia-Pacific: | Australia<br>China<br>India<br>Malaysia<br>Thailand |

# North America

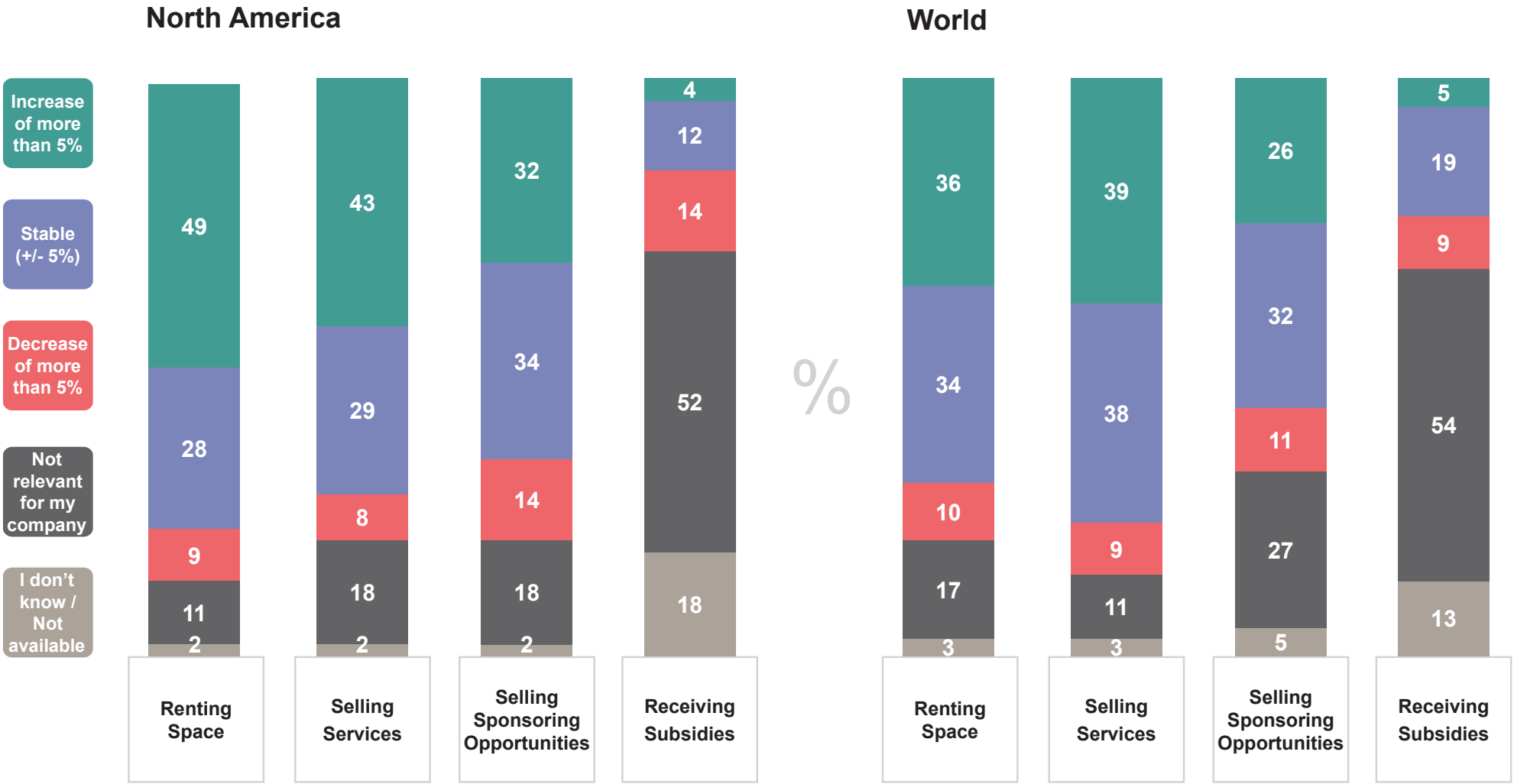
# Rented Space
# North America

## Aggregated Country Forecast
## 2025 compared to 2024



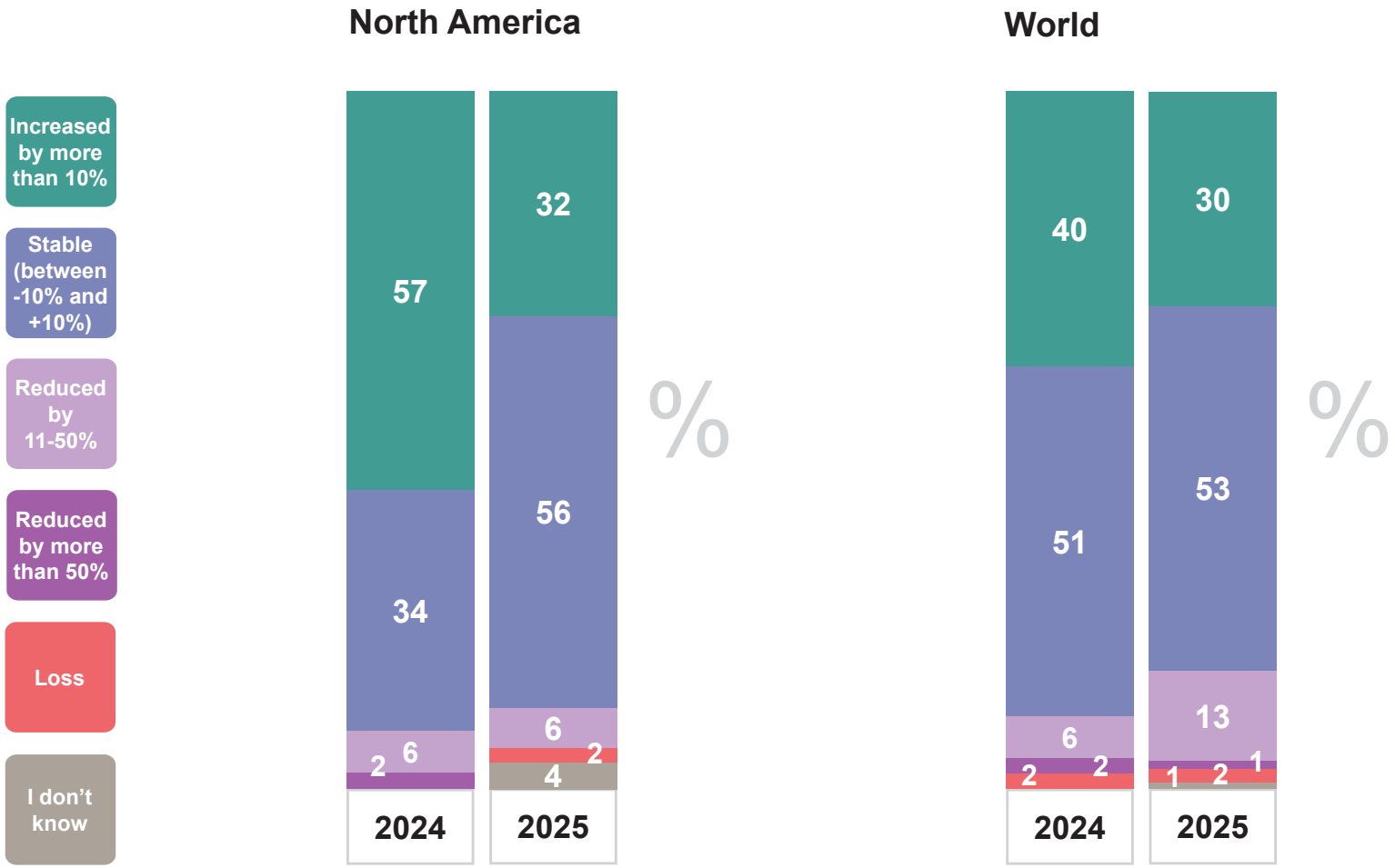
# Revenues
# North America

## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



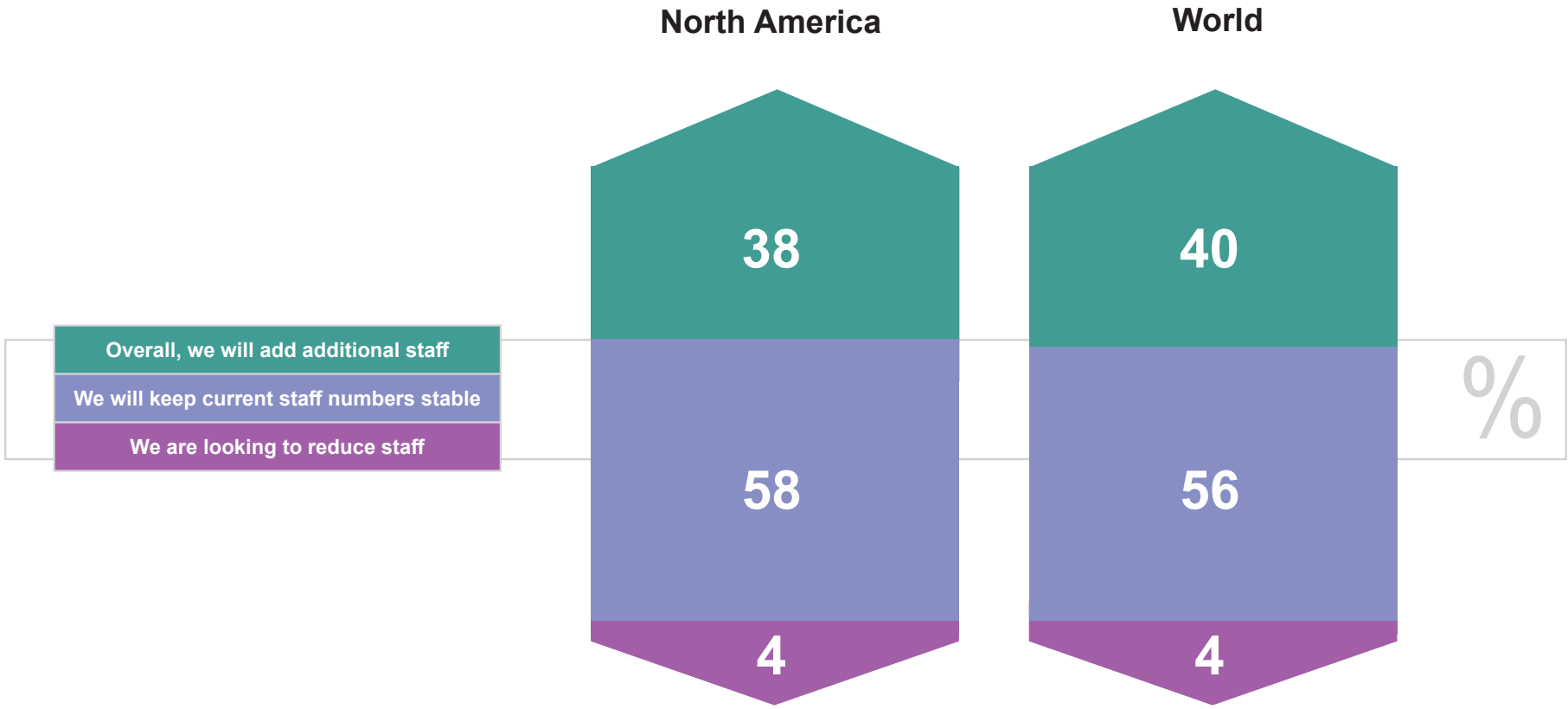
# Operating Profit
# North America

## Operating Profits
## compared to the previous year



# Workforce
# North America

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

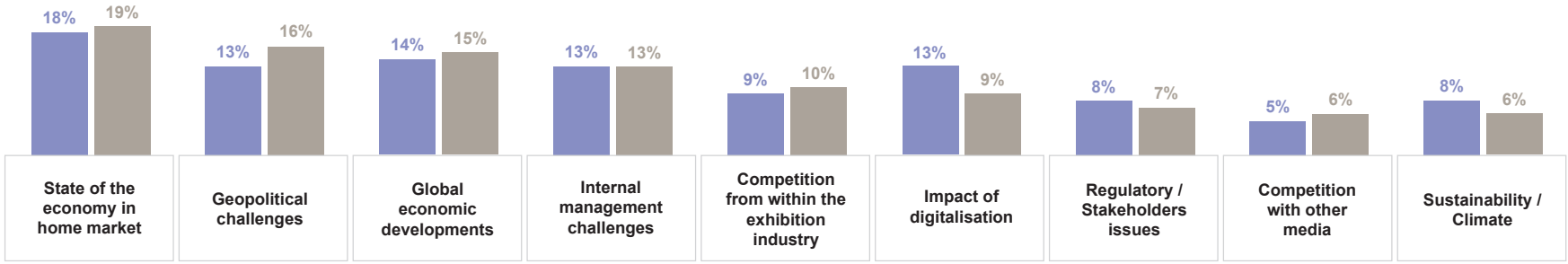


# Most Important Business Issues
# North America

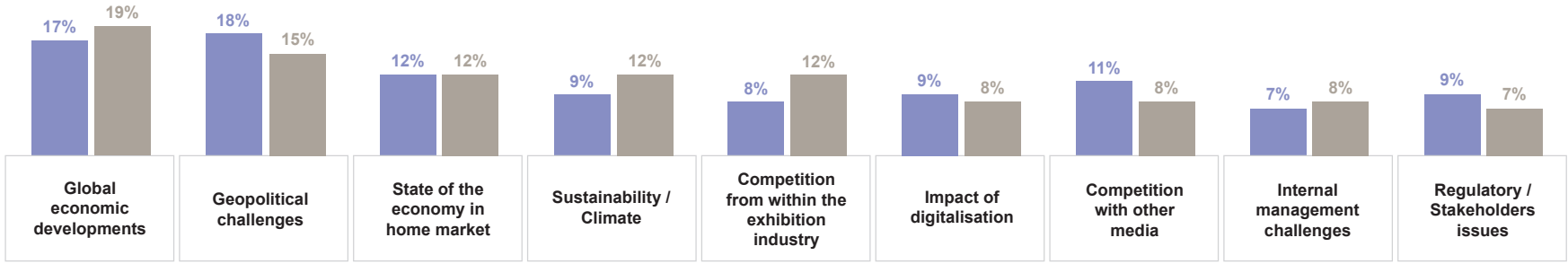
The Global Association of the Exhibition Industry

## Short term (12-18 months)

North America | Global




## Mid-term (3-5 years)



# Current Strategic Priorities
# North America

## Range of Activities

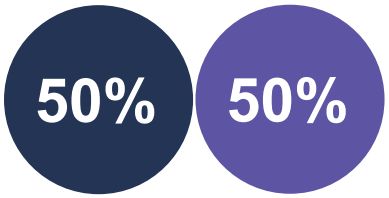
| Key | |
|---|---|
| Develop my activities in line with my current product portfolio | Develop new activities and grow existing ones |
| Stay within current scope of activities | Develop new activities outside my current product portfolio |

| North America | |
|---|---|
| 24% | 12% |
| 16% | 47% |

| World | |
|---|---|
| 32% | 19% |
| 20% | 29% |

## Geographic Exposure

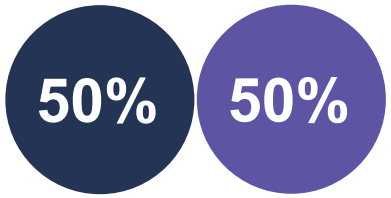
### North America




Stay in the same countries as those in which I currently operate

Operate in new countries

### World

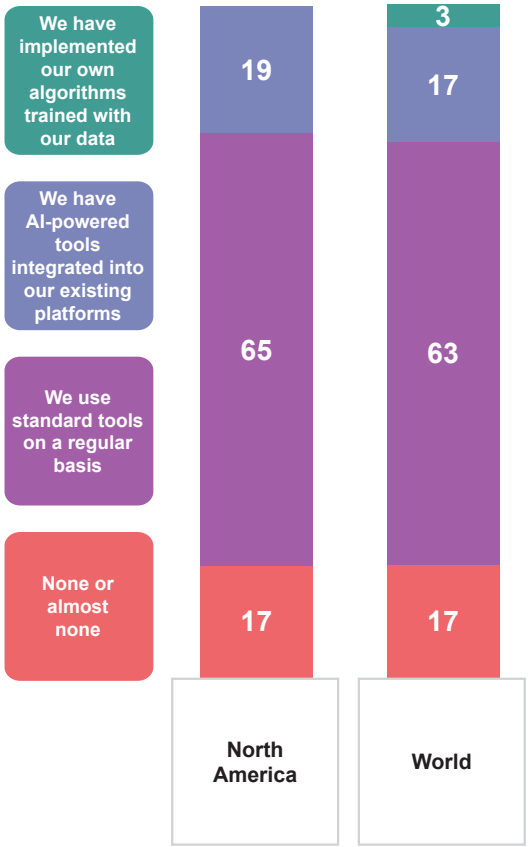



Stay in the same countries as those in which I currently operate

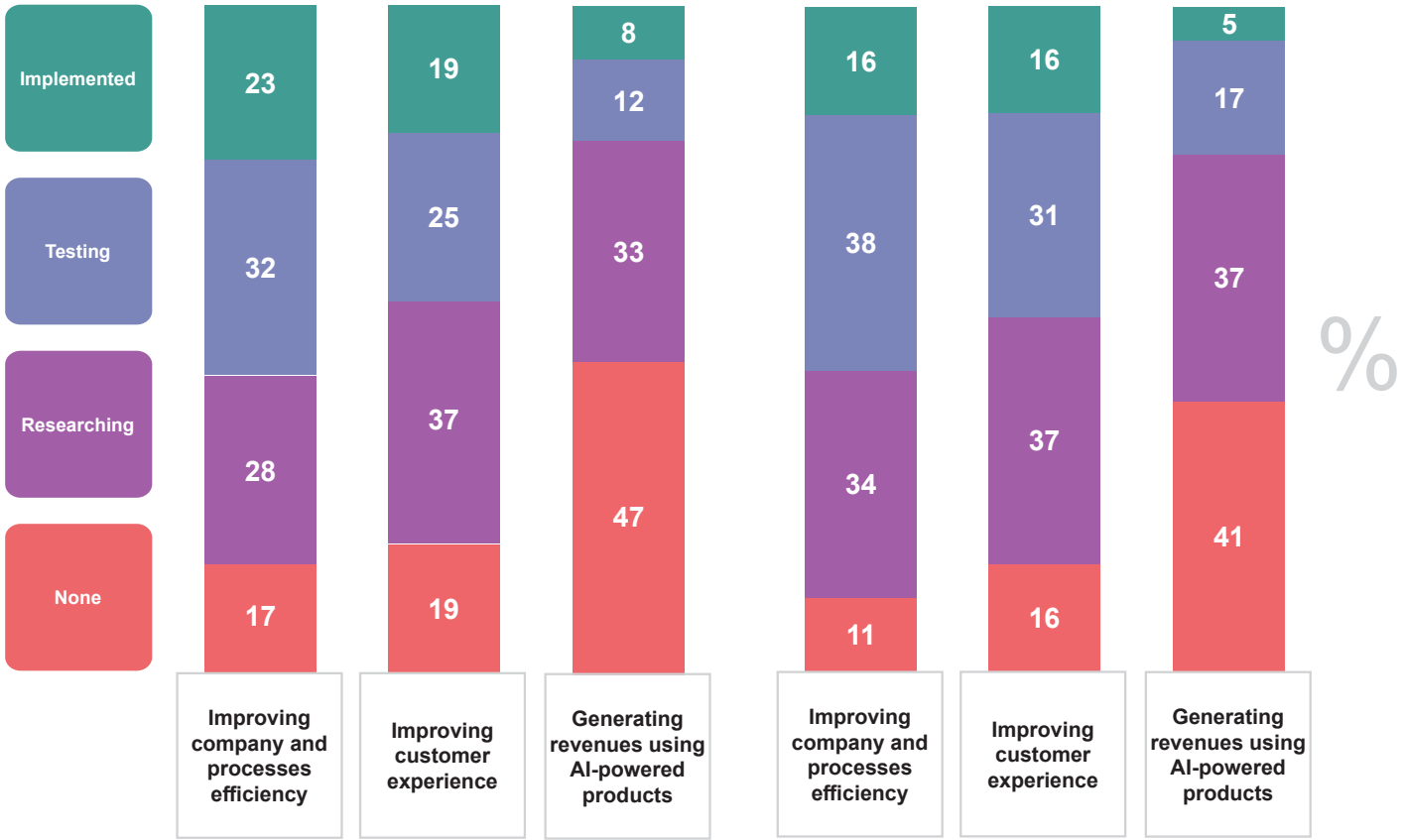
Operate in new countries

# Generative AI Applications
# North America

## Level of Implementation

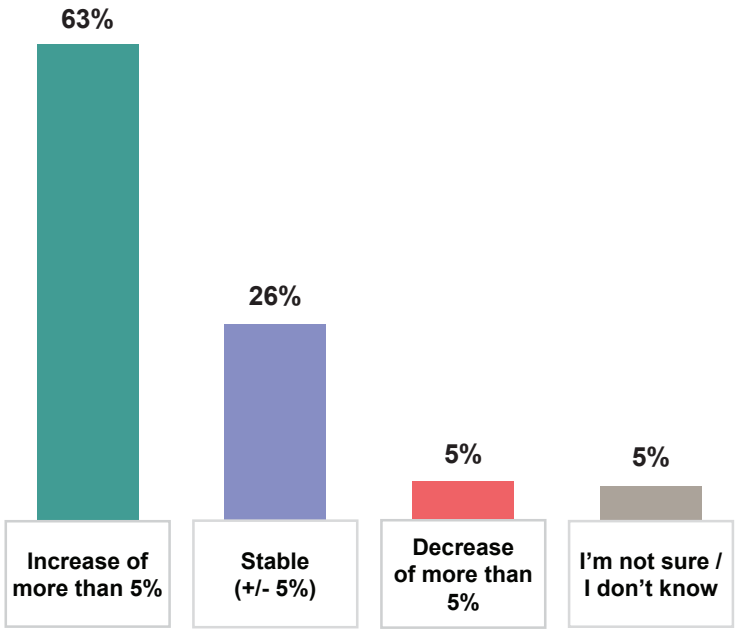



## Level of Maturity

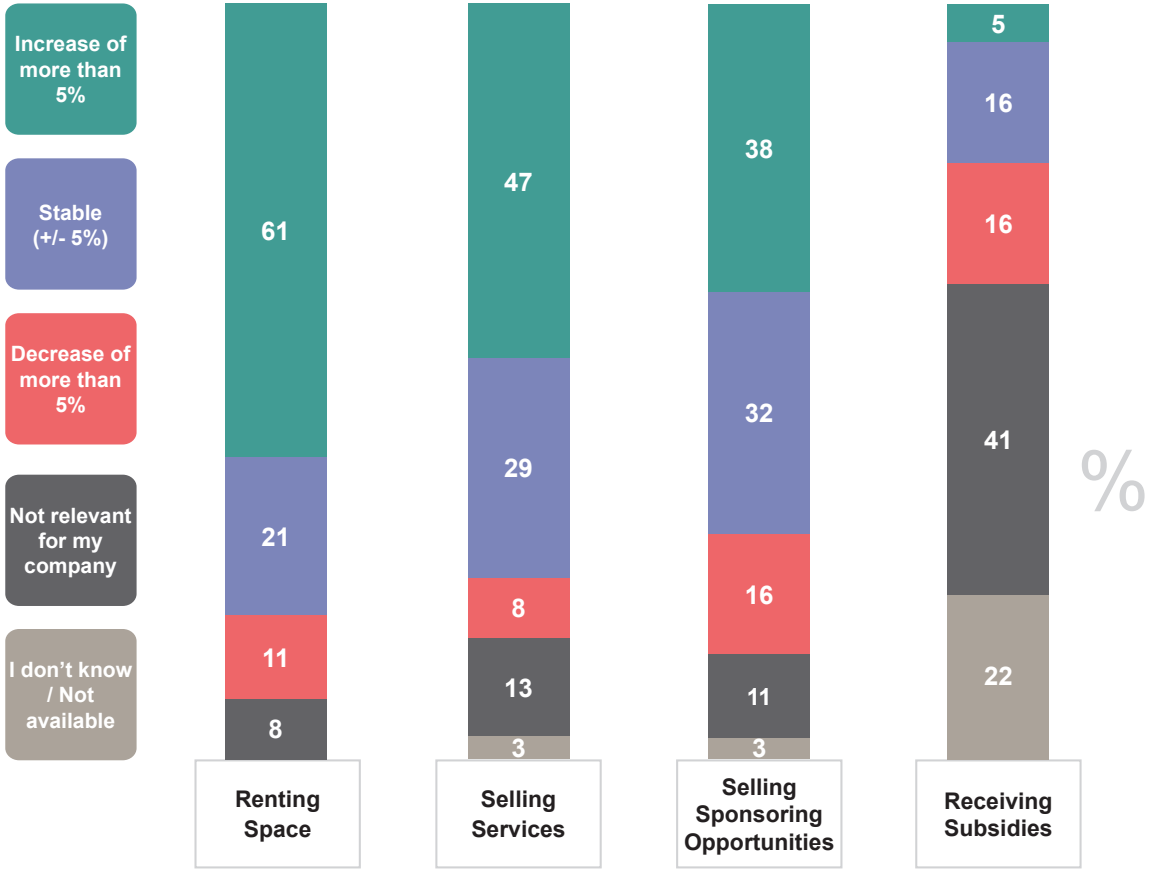


# Detailed results for Mexico

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

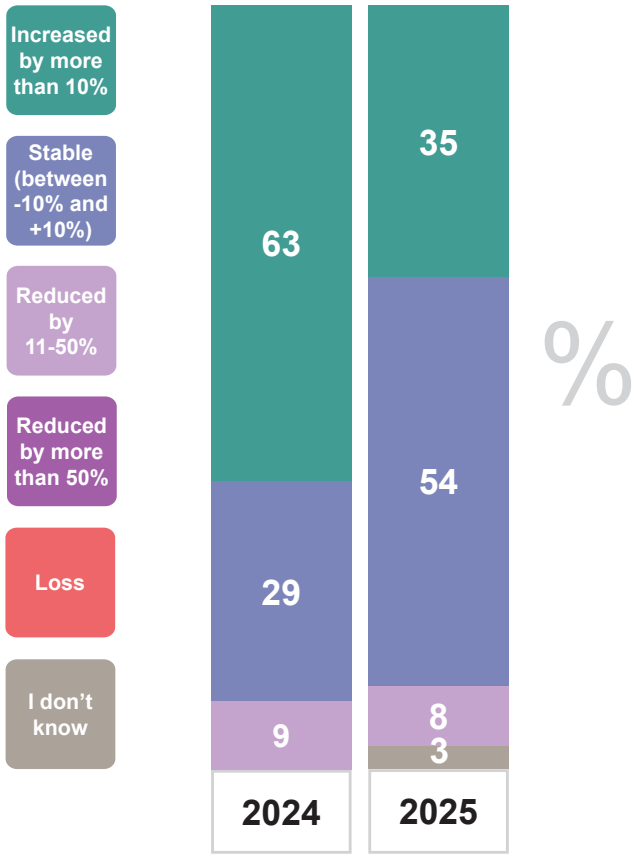




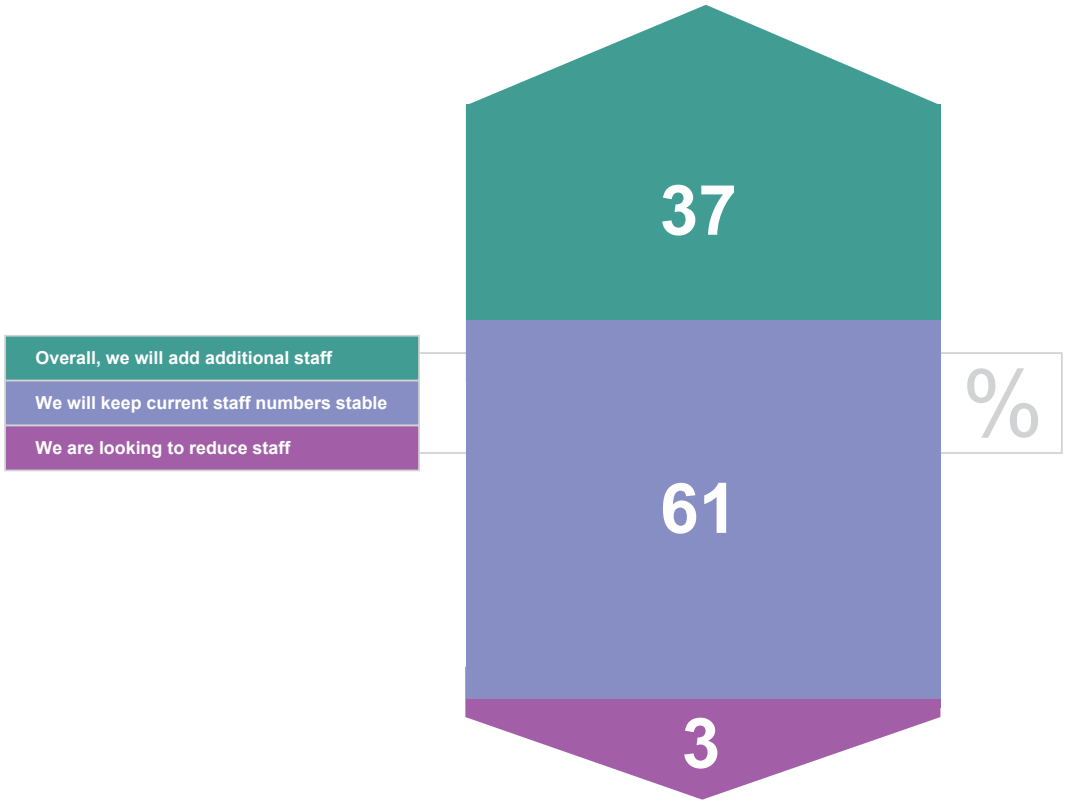

(38 answers in total)

# Detailed results for Mexico

## Operating Profits compared to the previous year




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

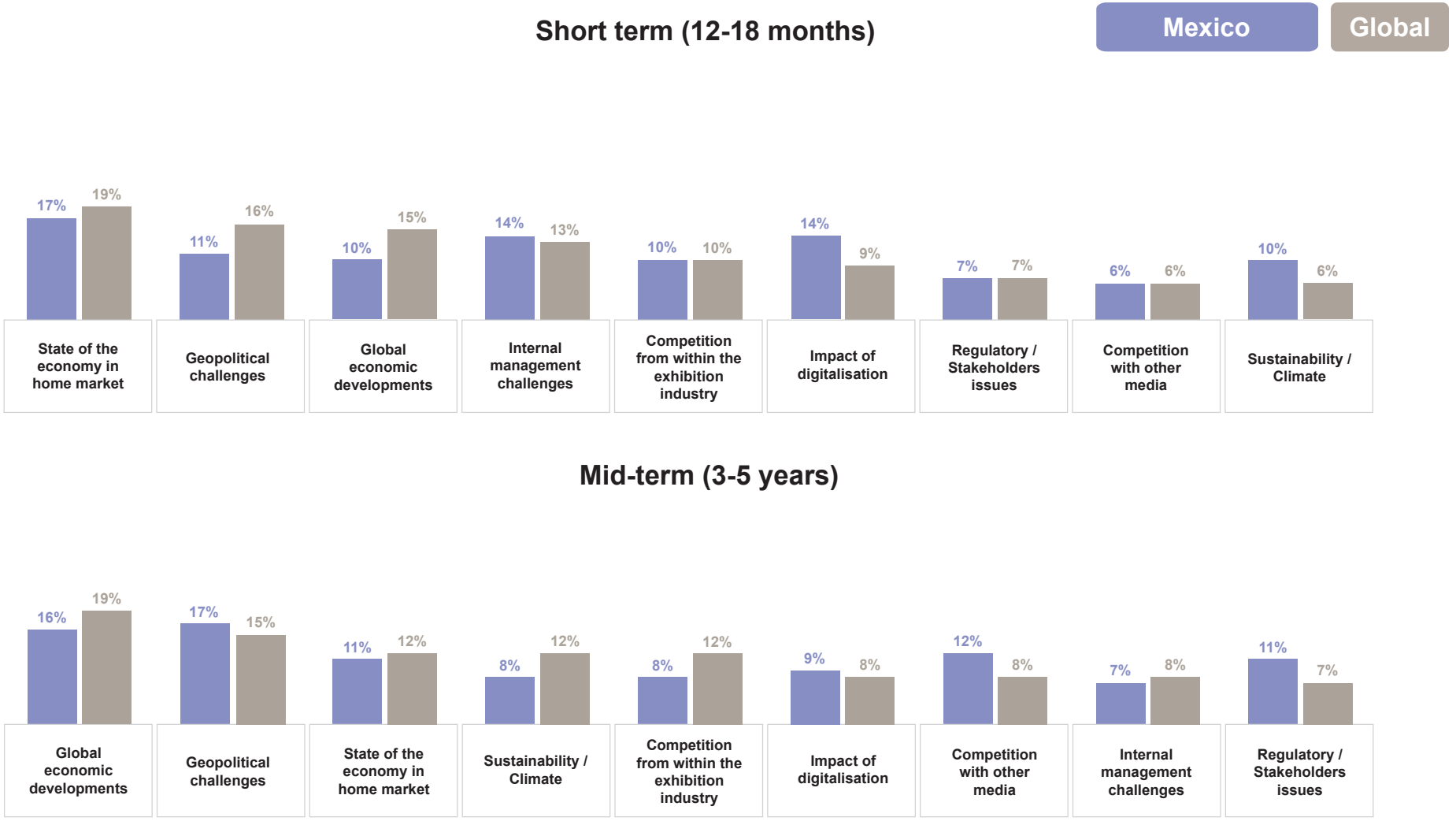





(38 answers in total)

# Detailed results for Mexico

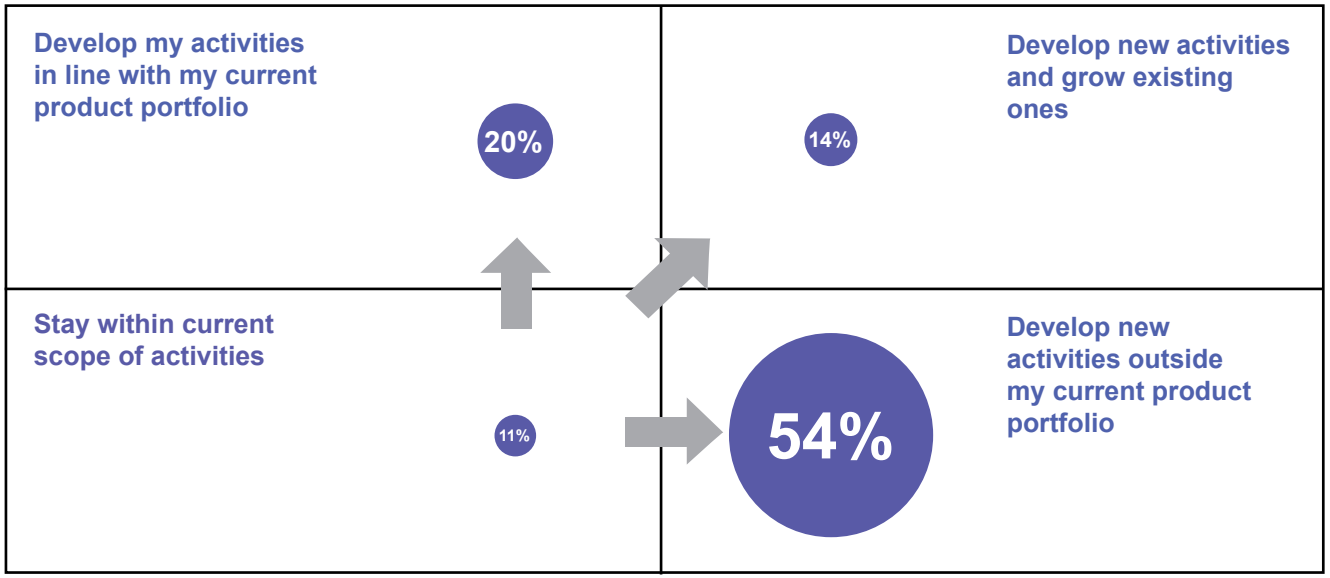
## Most important business issues in the exhibition industry right now



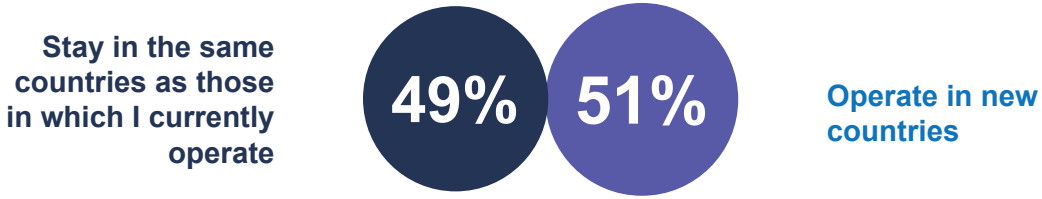
# Detailed results for Mexico

## Current Strategic Priorities Related To:

### Range of Activities



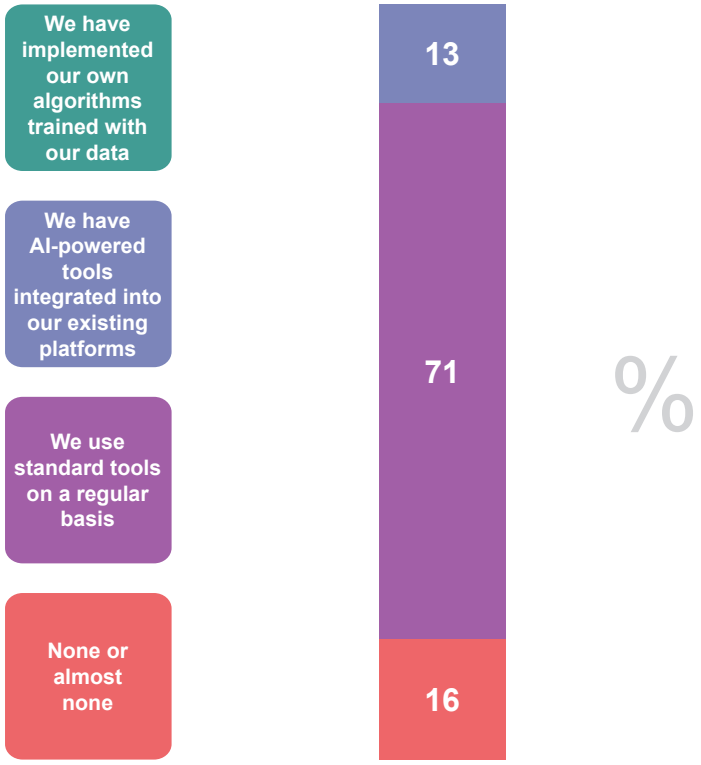

### Geographic Exposure



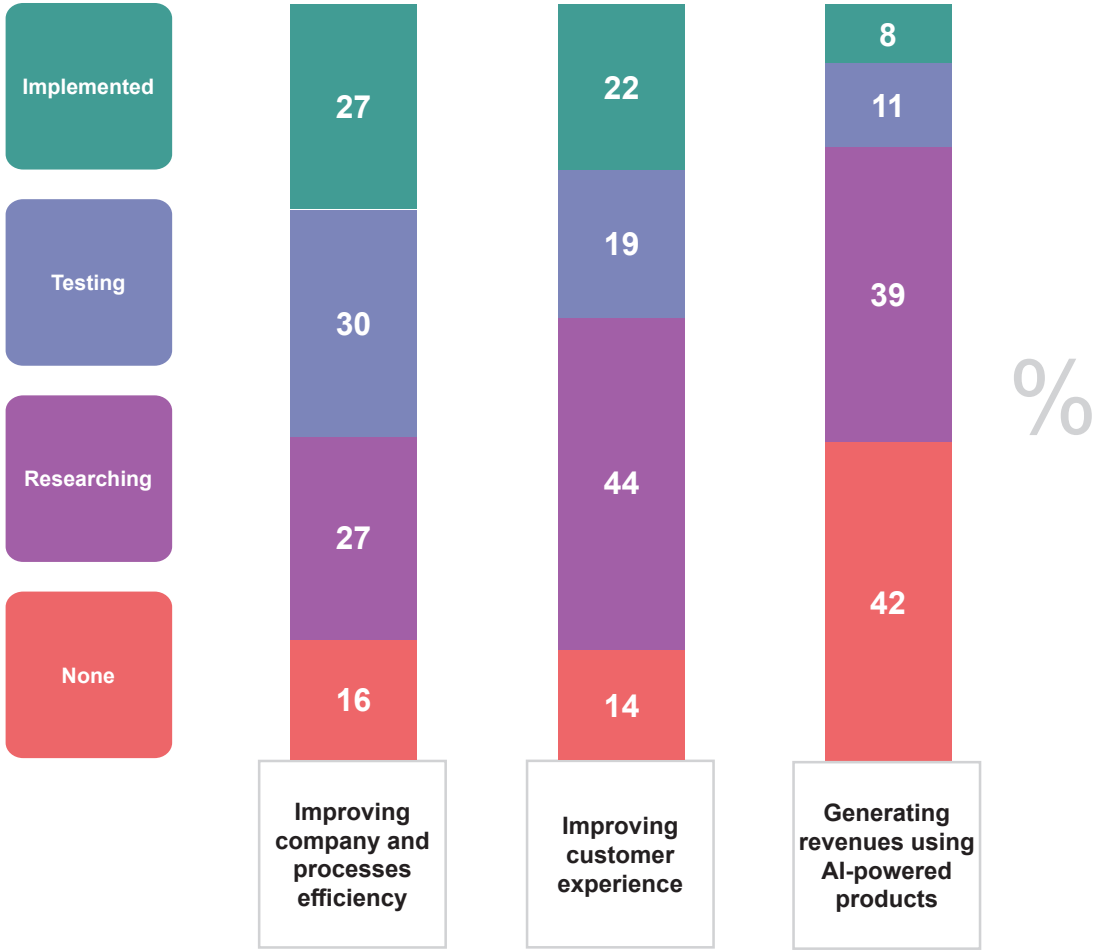
# Detailed results for Mexico

## Generative AI Applications

### Level of Implementation




### Level of Maturity

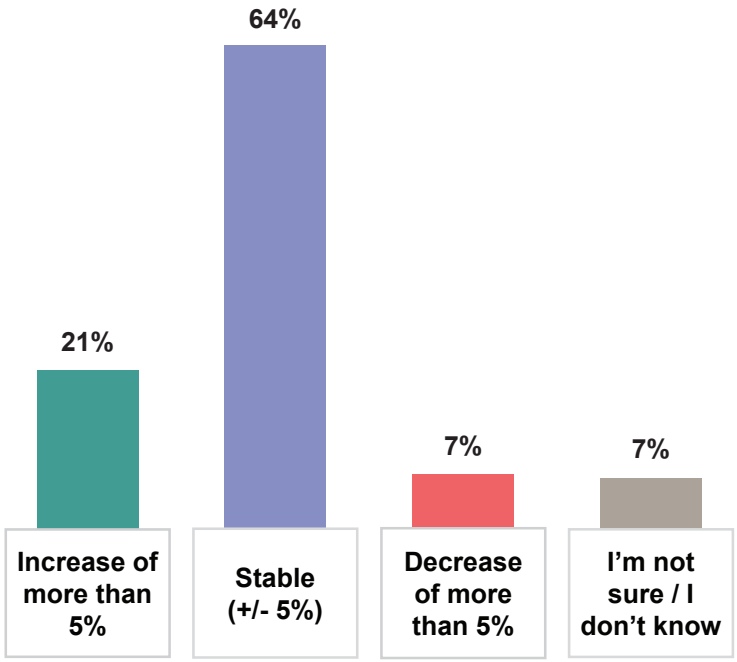




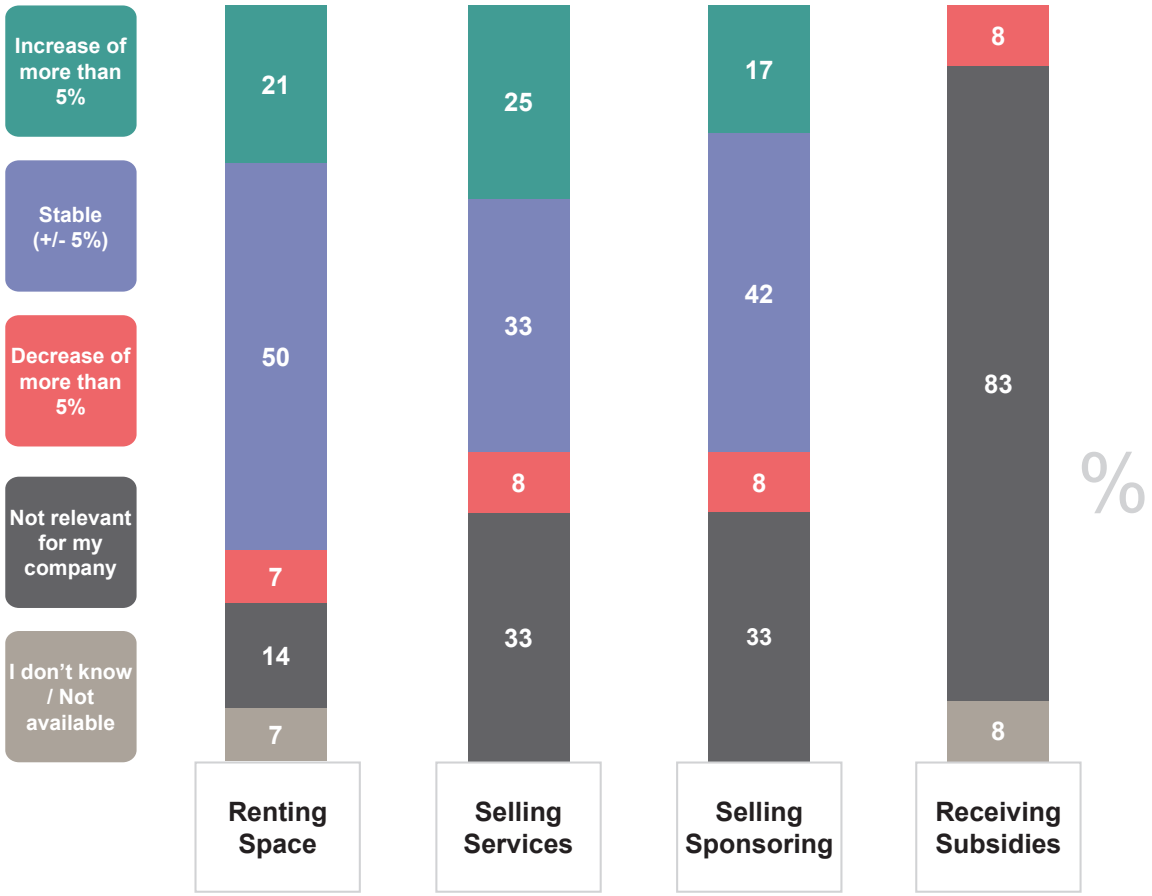

(38 answers in total)

# Detailed results for USA

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

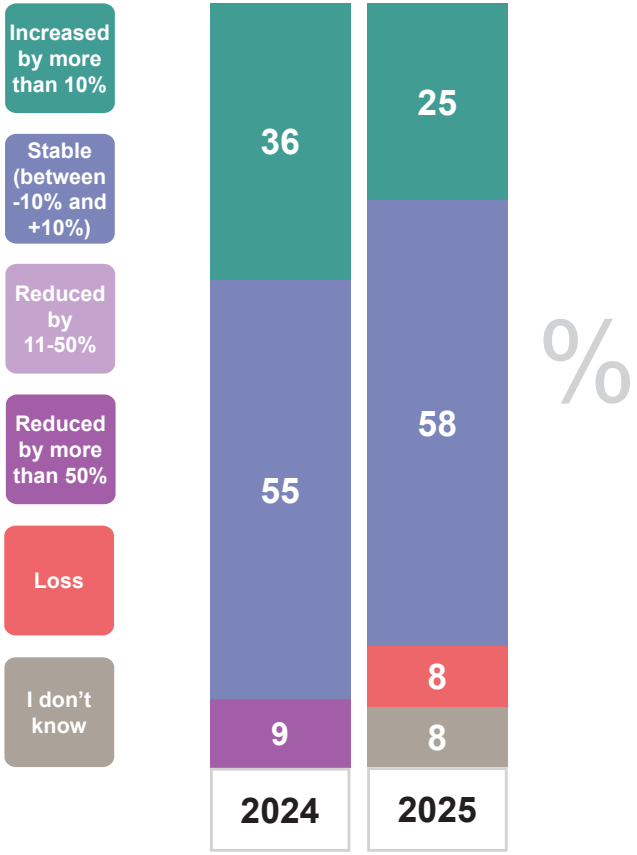




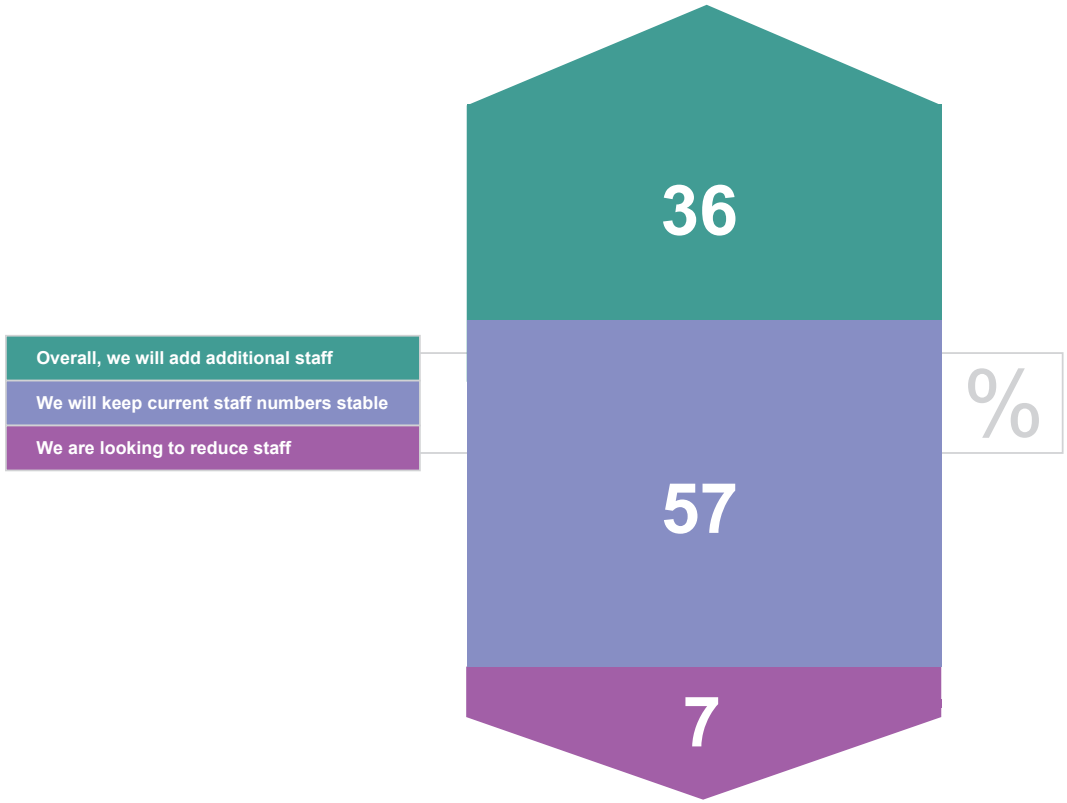

(14 answers in total)

# Detailed results for USA

## Operating Profits compared to the previous year




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

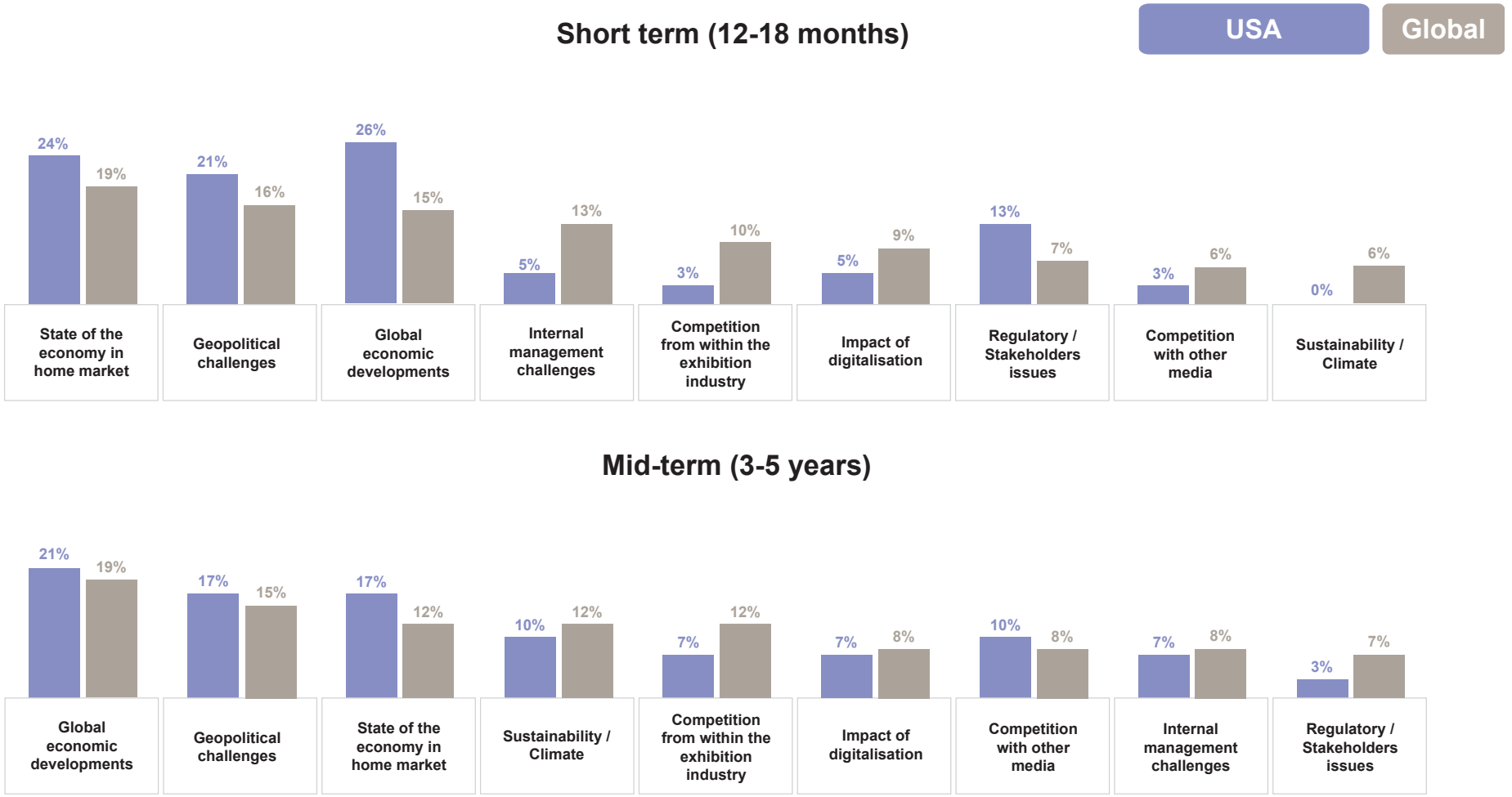





(14 answers in total)

# Detailed results for USA

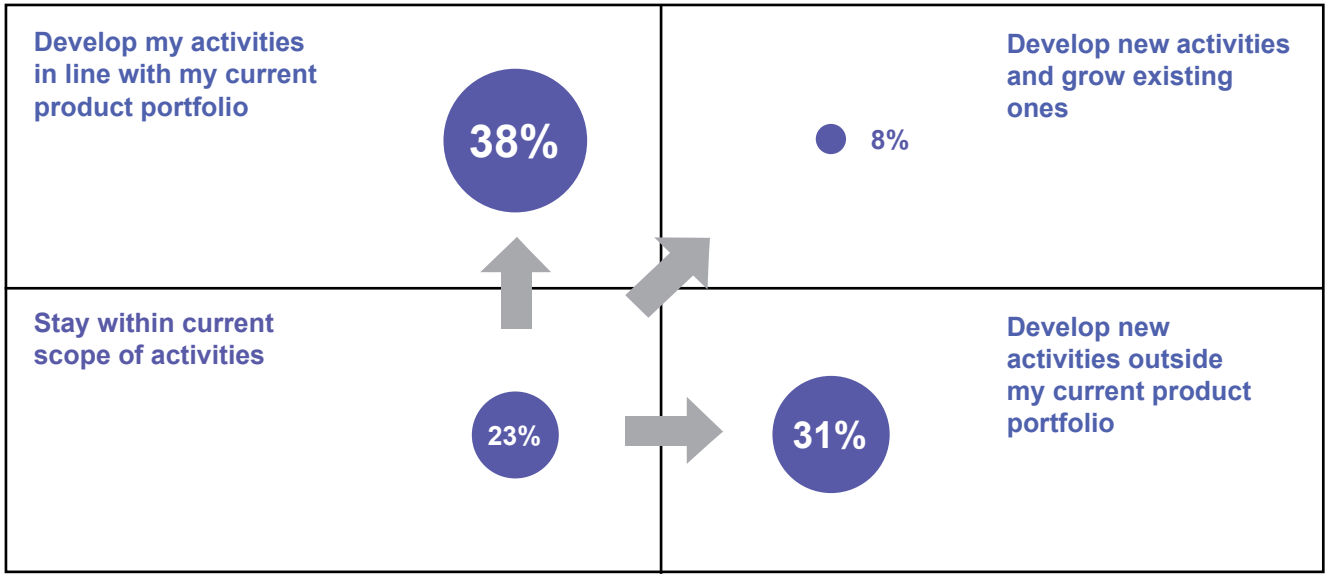
## Most important business issues in the exhibition industry right now



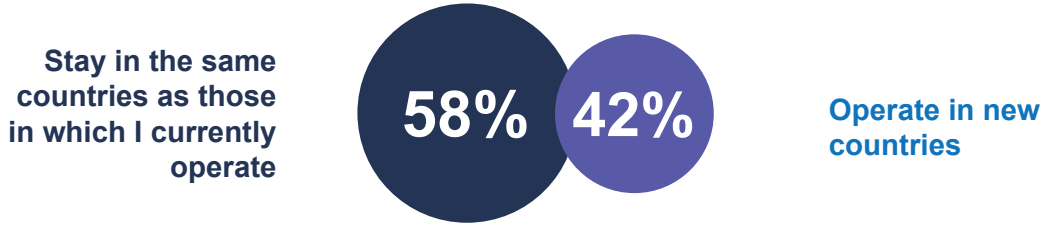
# Detailed results for USA

## Current Strategic Priorities Related To:

### Range of Activities




### Geographic Exposure



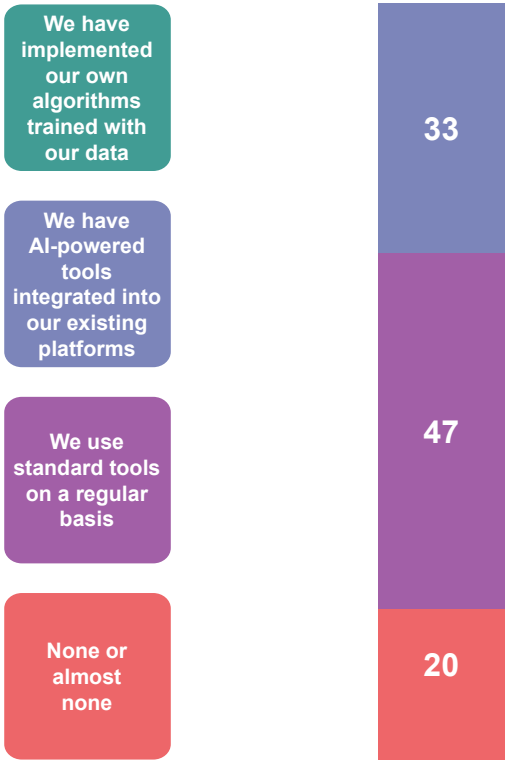



(14 answers in total)

# Detailed results for USA

## Generative AI Applications

### Level of Implementation




### Level of Maturity

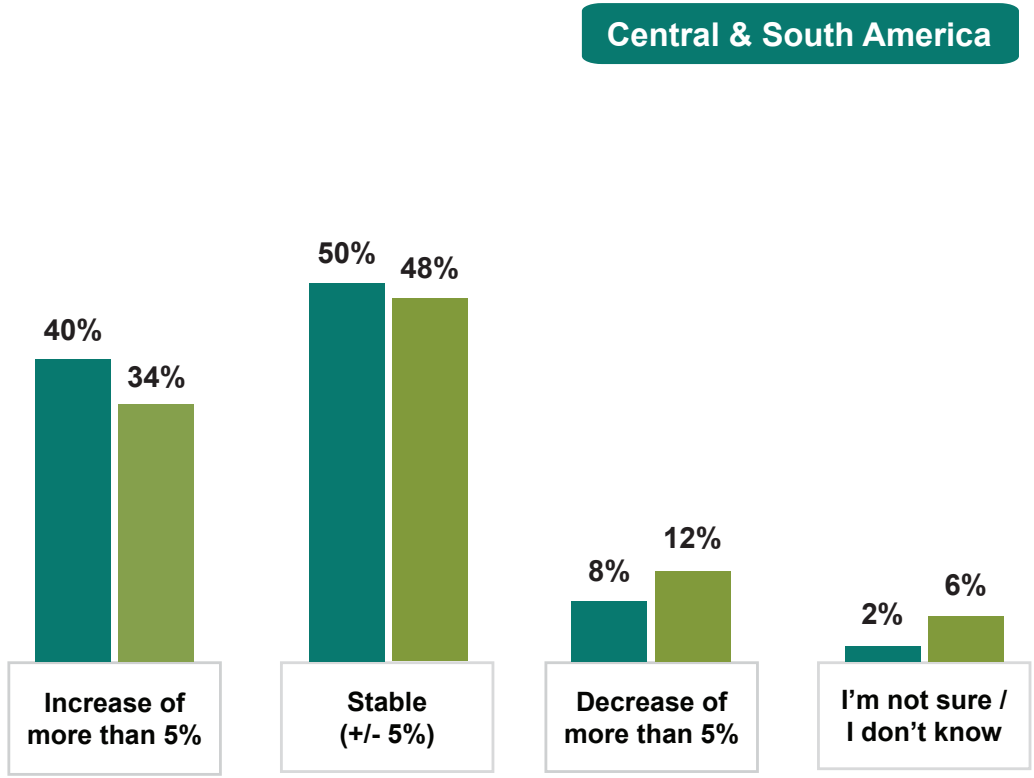
(14 answers in total)

# Central & South America

# Rented Space
# Central & South America

ufi The Global Association of the Exhibition Industry

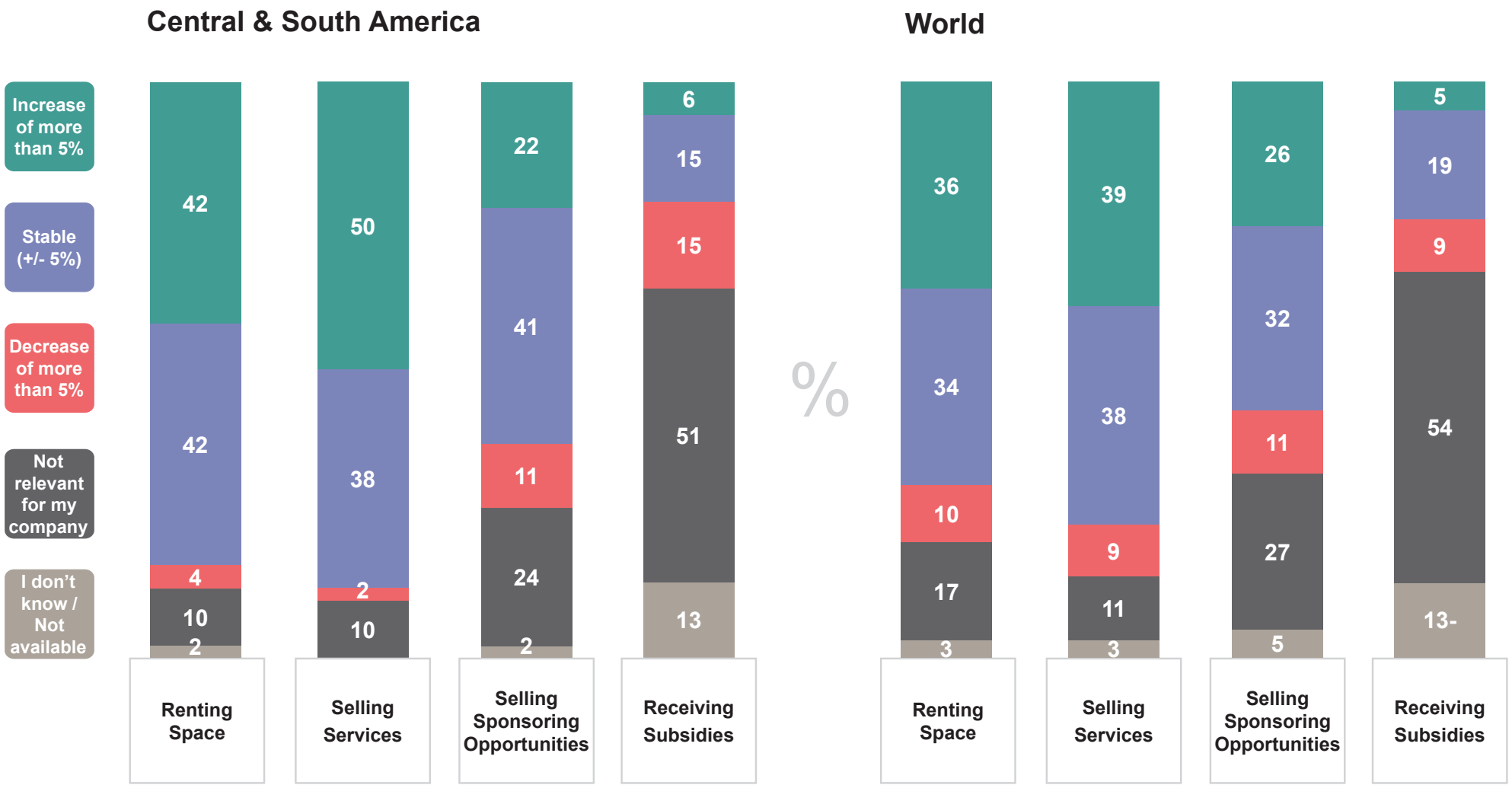
**Aggregated Country Forecast**
**2025 compared to 2024**



# Revenues
# Central & South America

ufi The Global Association of the Exhibition Industry

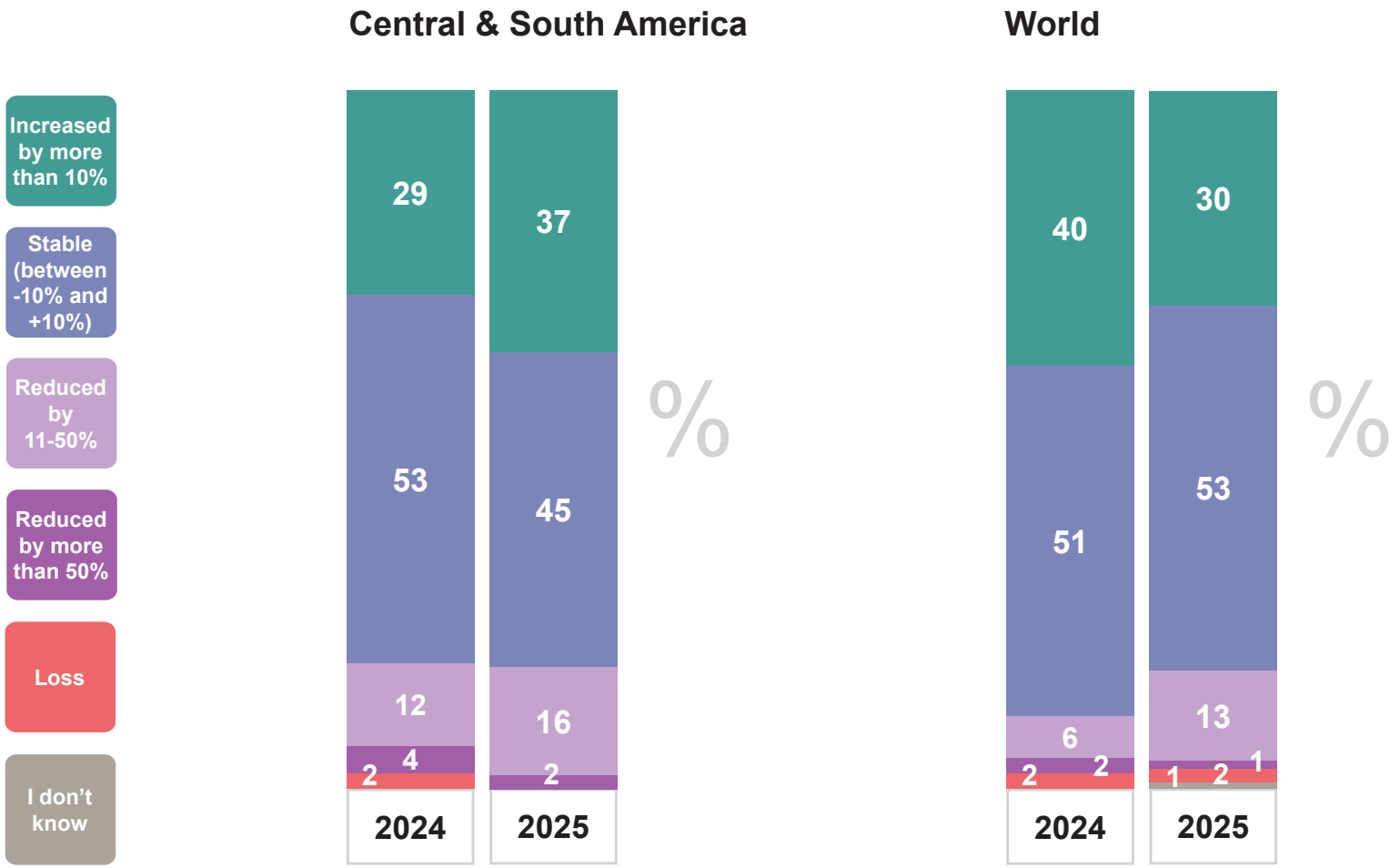
## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



# Operating Profit
# Central & South America

ufi The Global Association of the Exhibition Industry

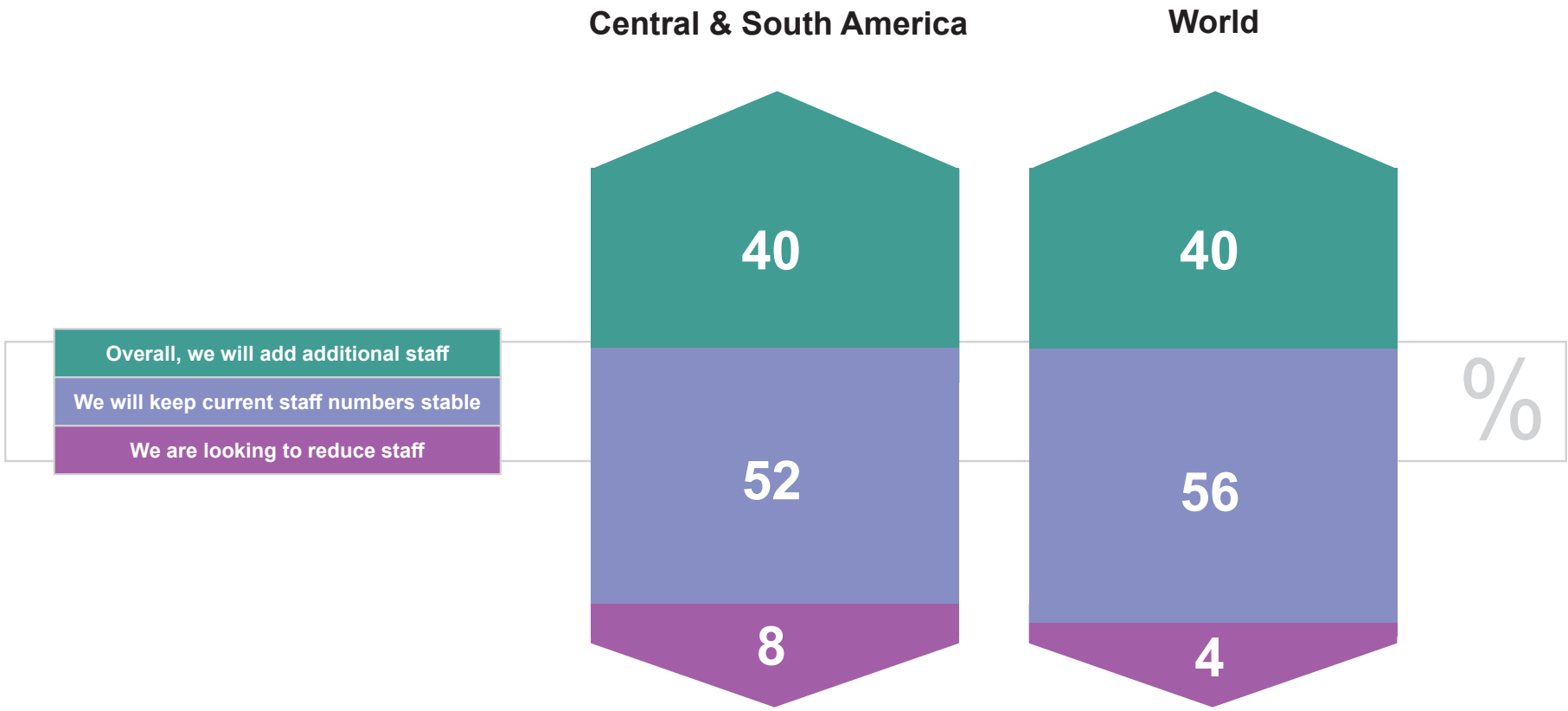
## Operating Profits
## compared to the previous year



# Workforce
# Central & South America

The Global Association of the Exhibition Industry

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

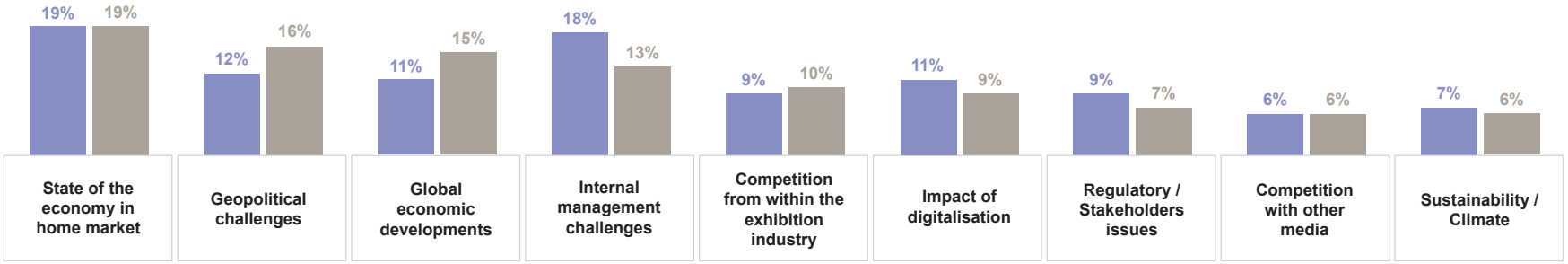


# Most Important Business Issues
# Central & South America

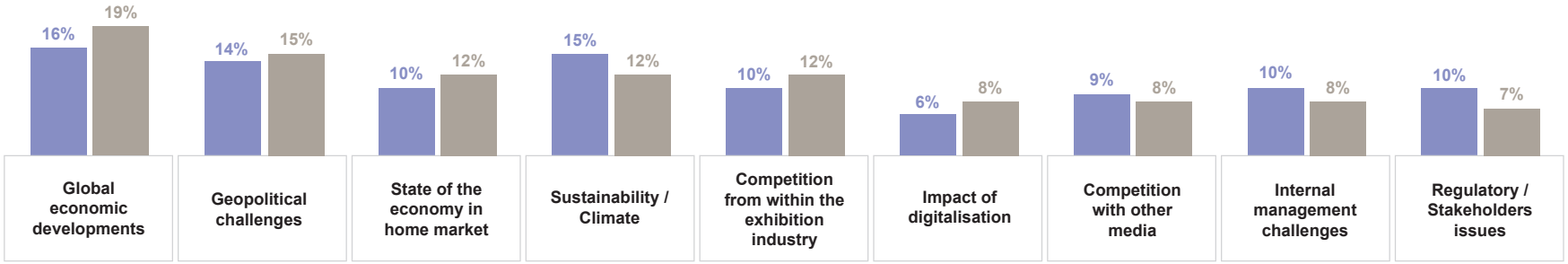
The Global Association of the Exhibition Industry

## Short term (12-18 months)

Central & South America | Global



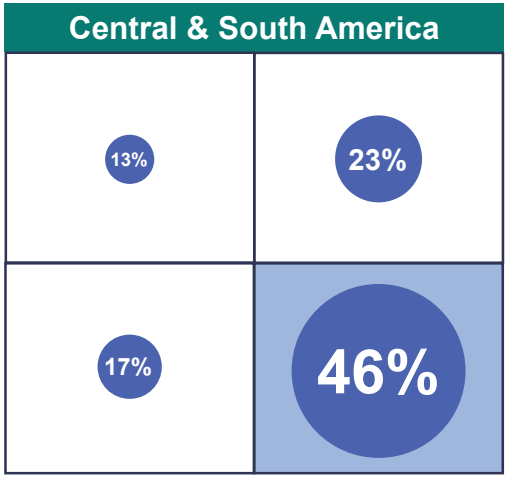

## Mid-term (3-5 years)

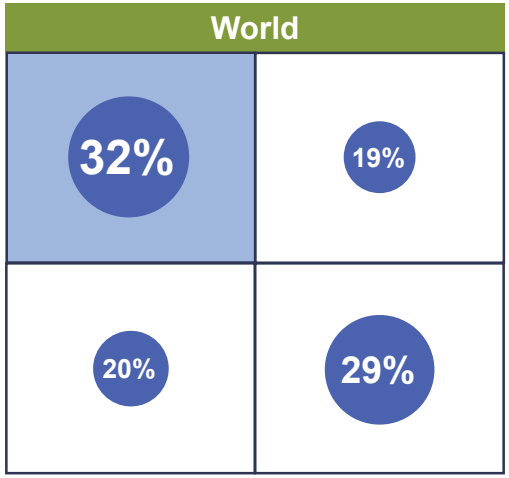


# Current Strategic Priorities
# Central & South America

## Range of Activities

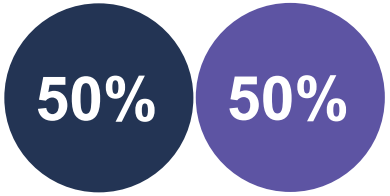
| Key | |
|---|---|
| Develop my activities in line with my current product portfolio | Develop new activities and grow existing ones |
| Stay within current scope of activities | Develop new activities outside my current product portfolio |




## Geographic Exposure

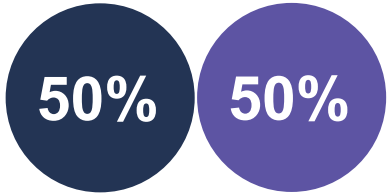
**Central & South America**




**Stay in the same countries as those in which I currently operate**

**Operate in new countries**

**World**



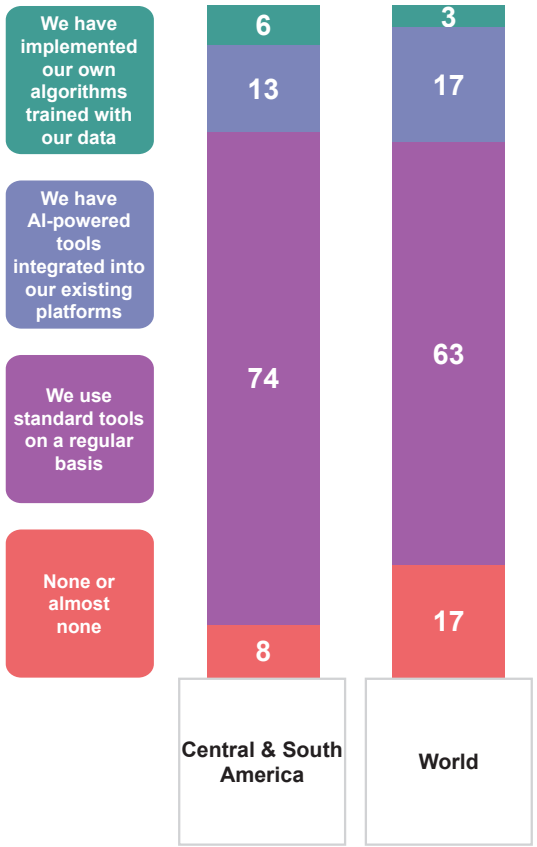

**Stay in the same countries as those in which I currently operate**

**Operate in new countries**

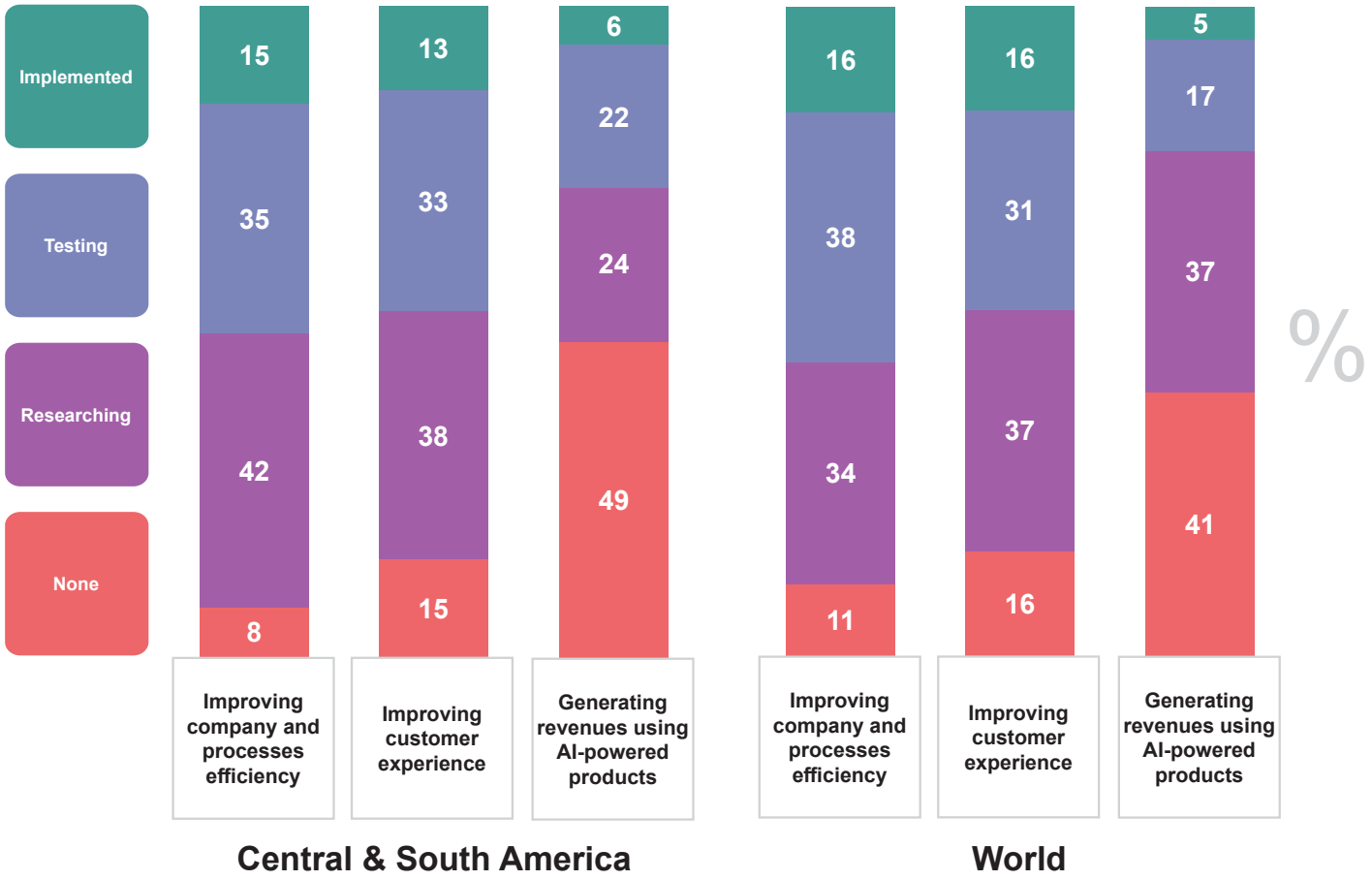
# Generative AI Applications
# Central & South America

ufi The Global Association of the Exhibition Industry

## Level of Implementation

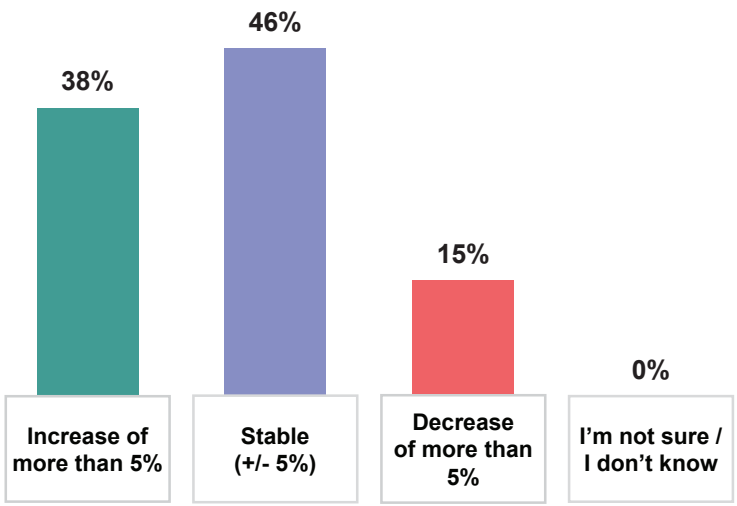



## Level of Maturity

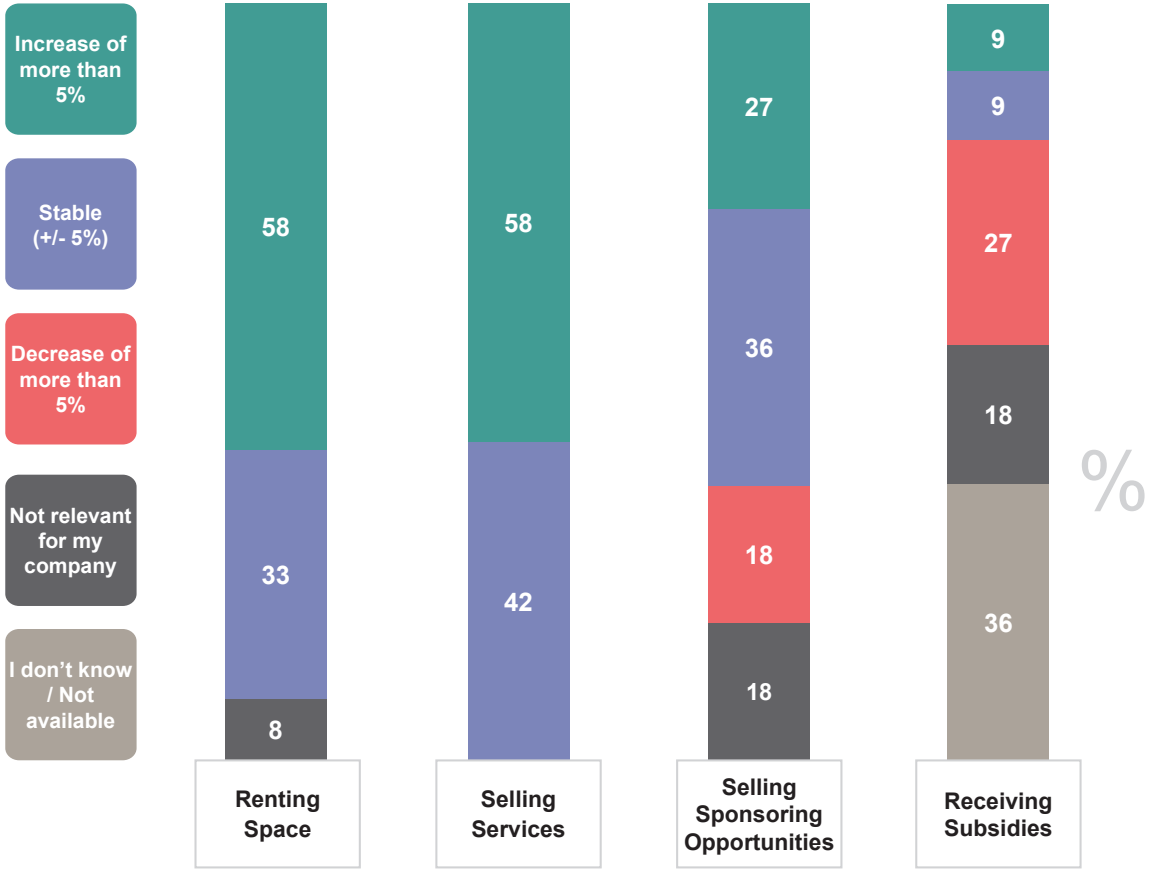


# Detailed results for Argentina

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024



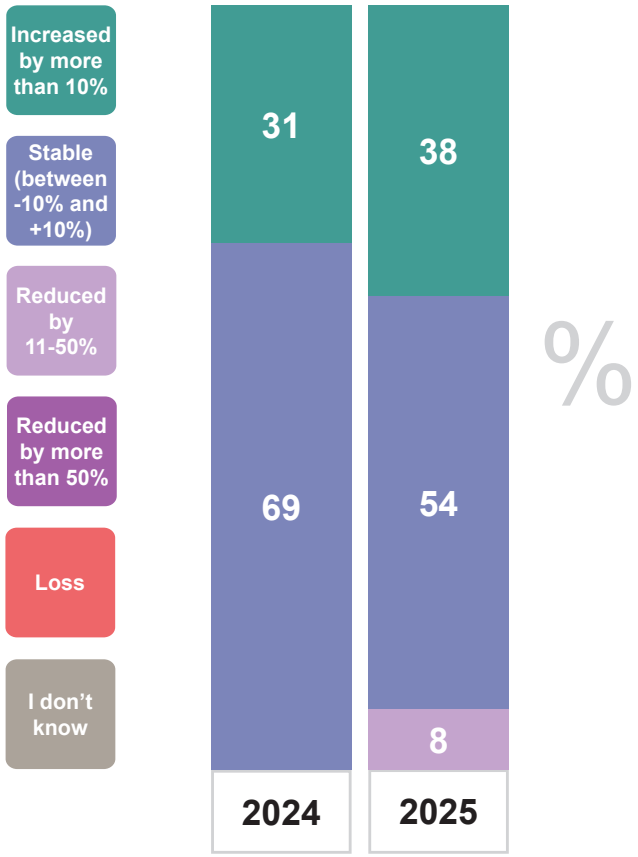

## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category



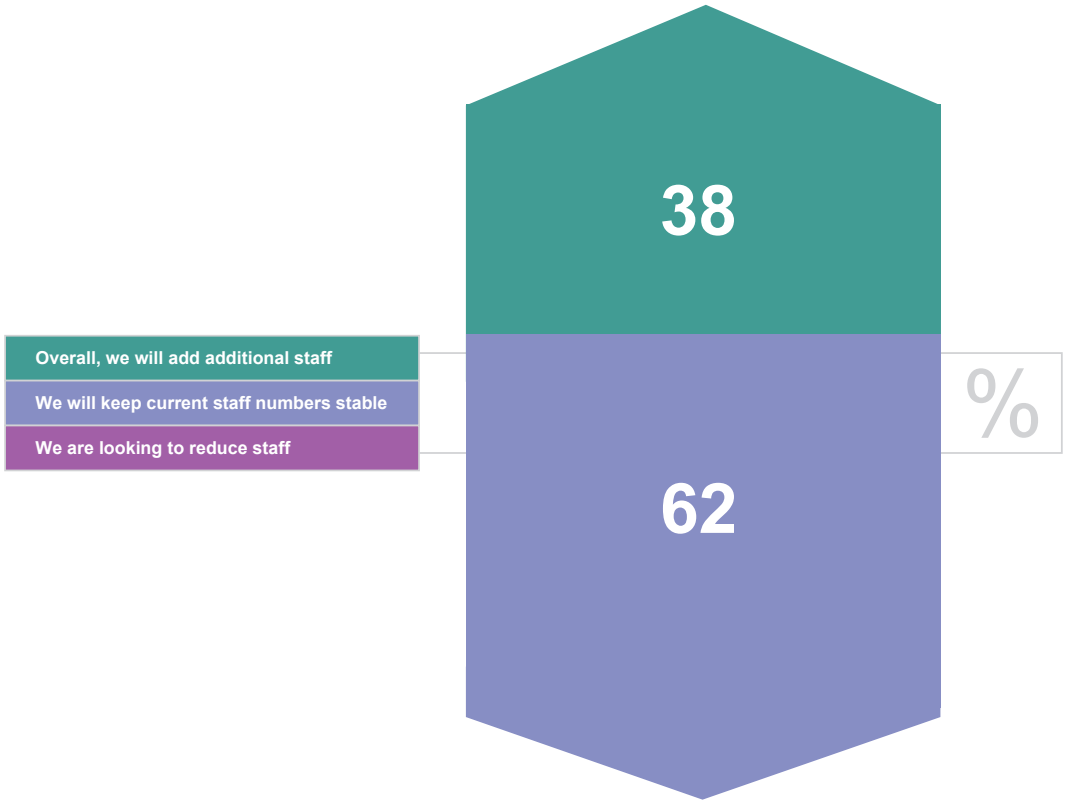

(13 answers in total)

# Detailed results for Argentina

## Operating Profits compared to the previous year




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

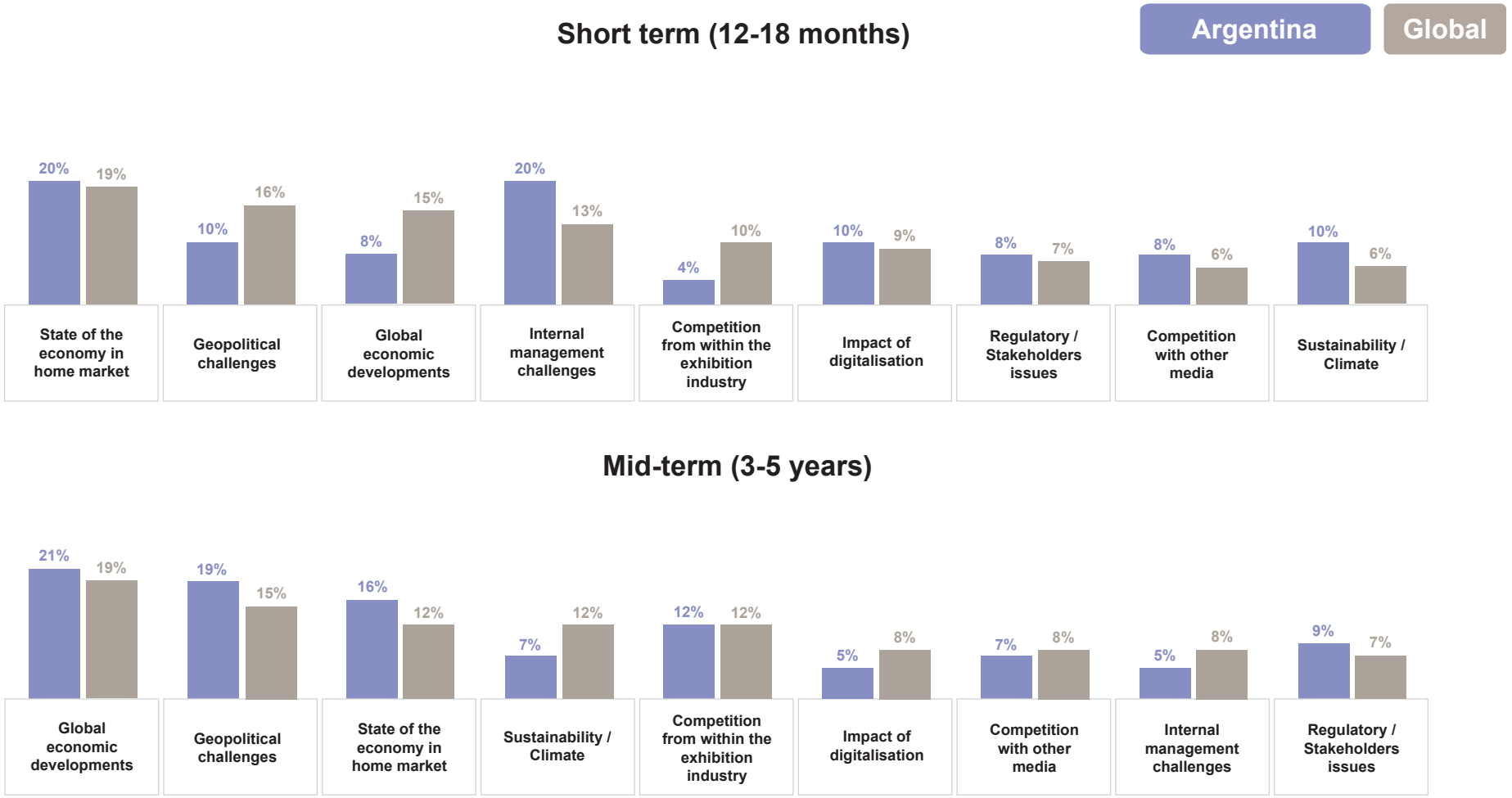





(13 answers in total)

# Detailed results for Argentina

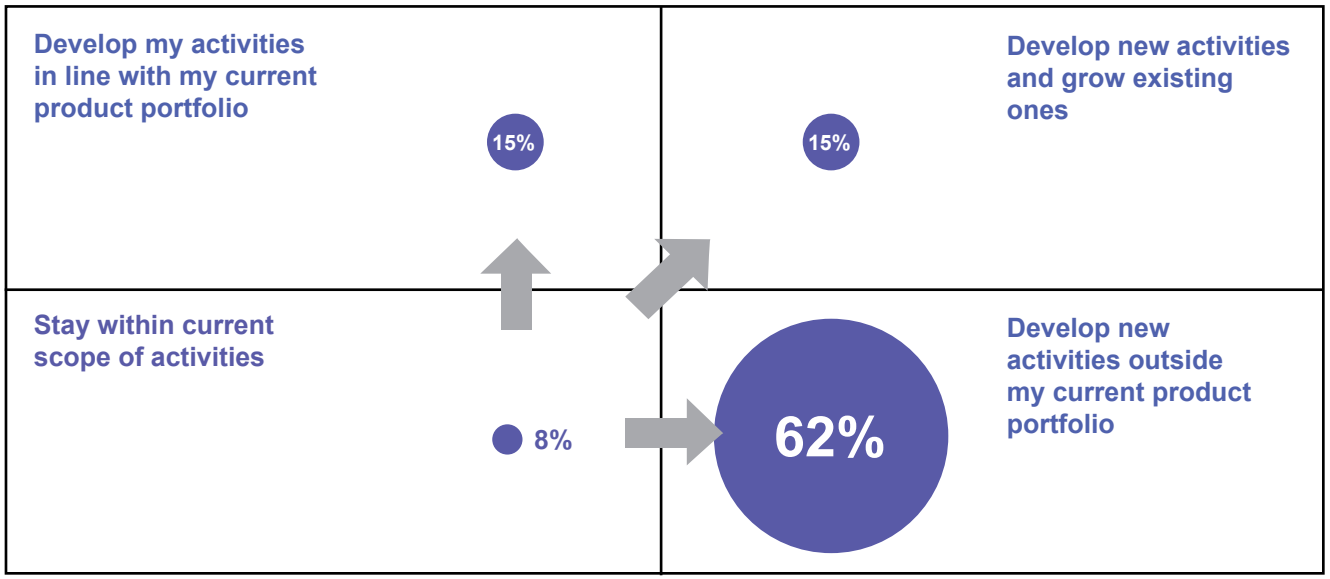
## Most important business issues in the exhibition industry right now



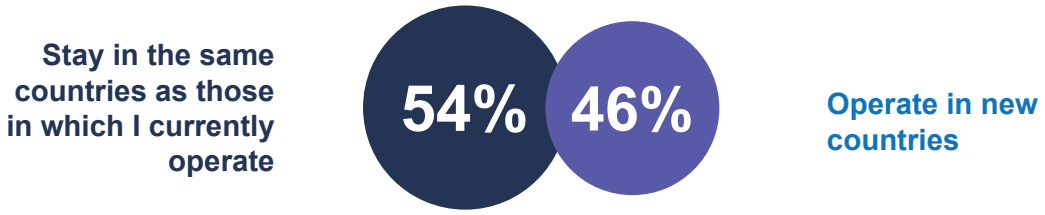
# Detailed results for Argentina

## Current Strategic Priorities Related To:

### Range of Activities




### Geographic Exposure



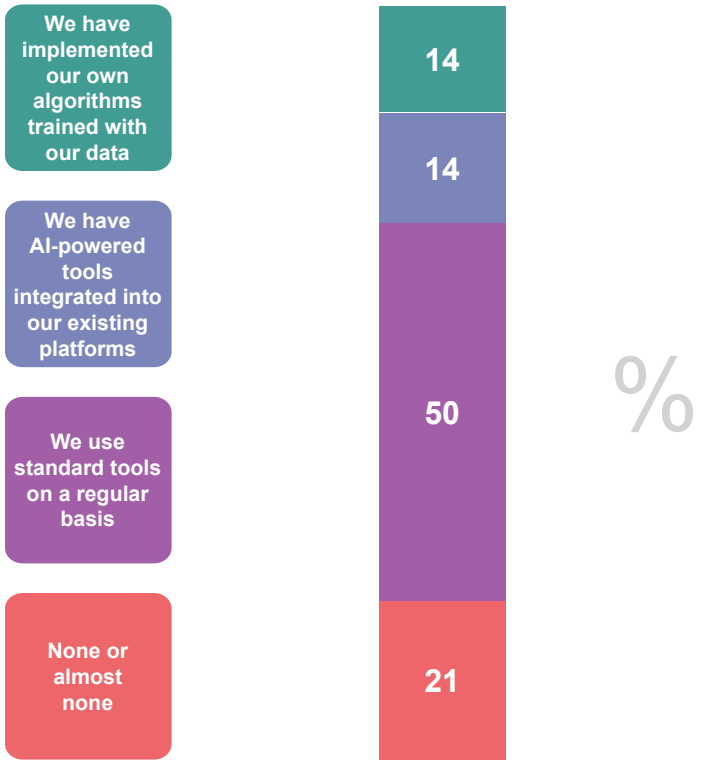



(13 answers in total)

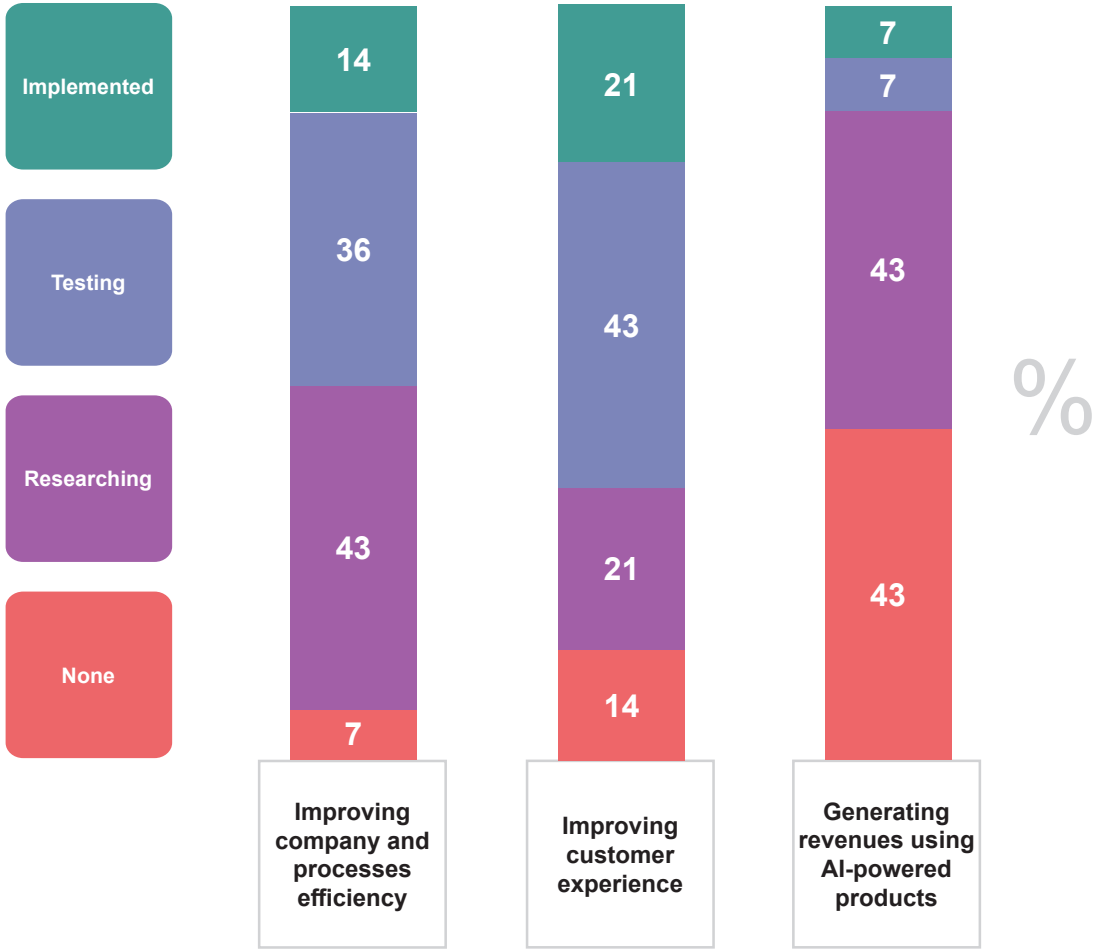
# Detailed results for Argentina

## Generative AI Applications

### Level of Implementation




### Level of Maturity

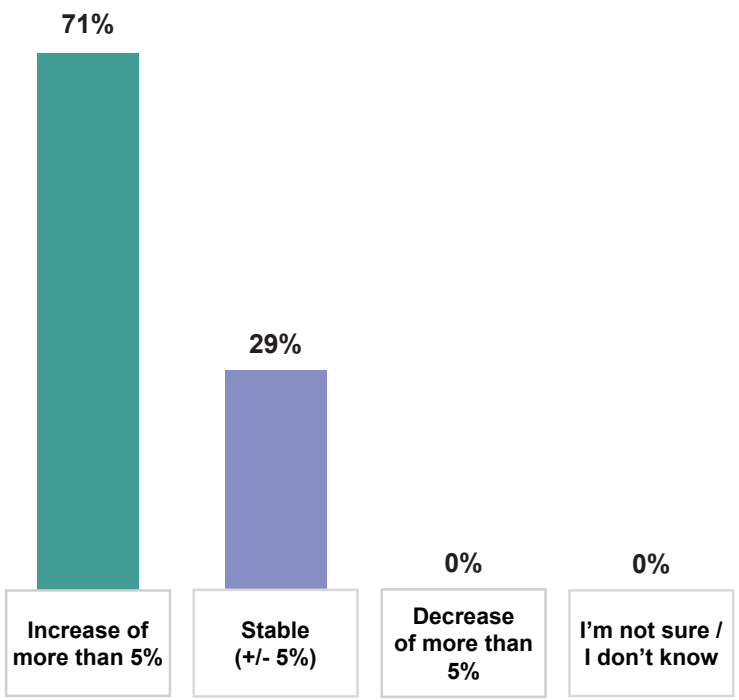




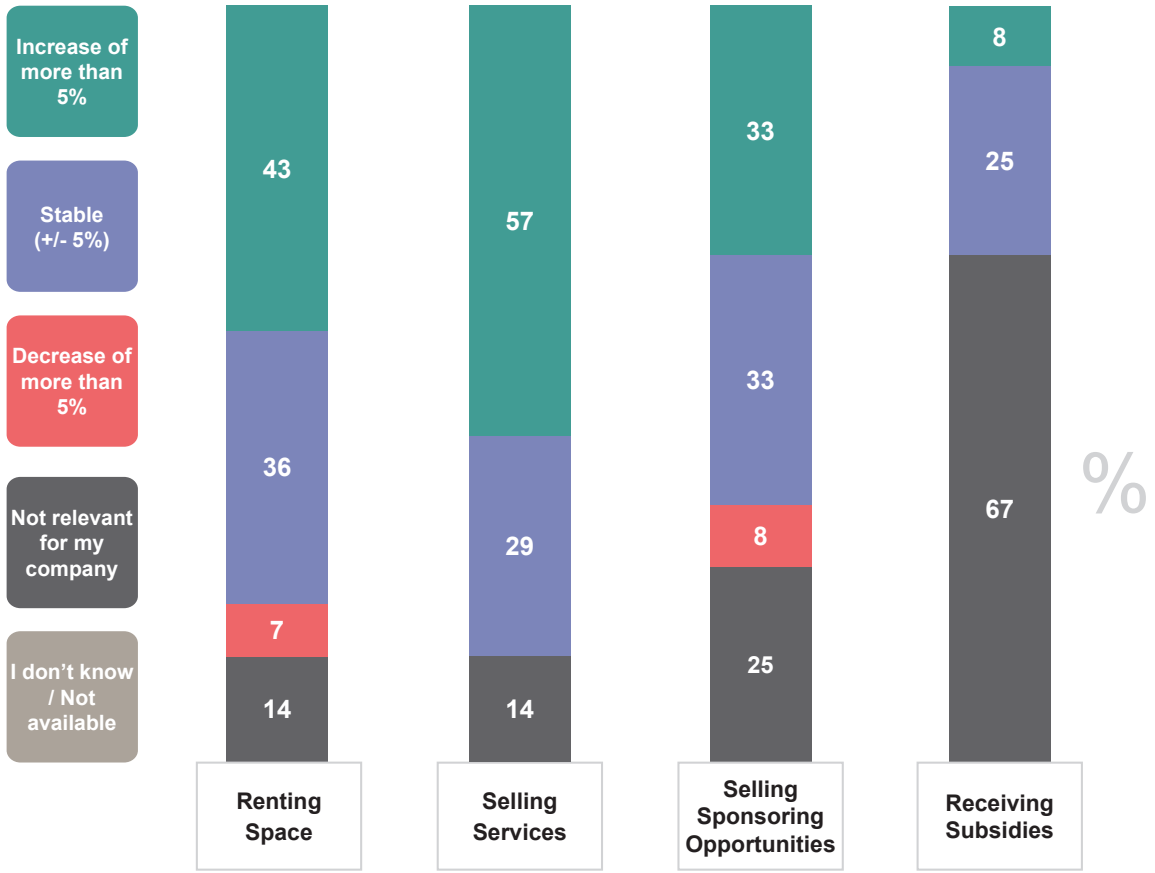

(13 answers in total)

# Detailed results for Brazil

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

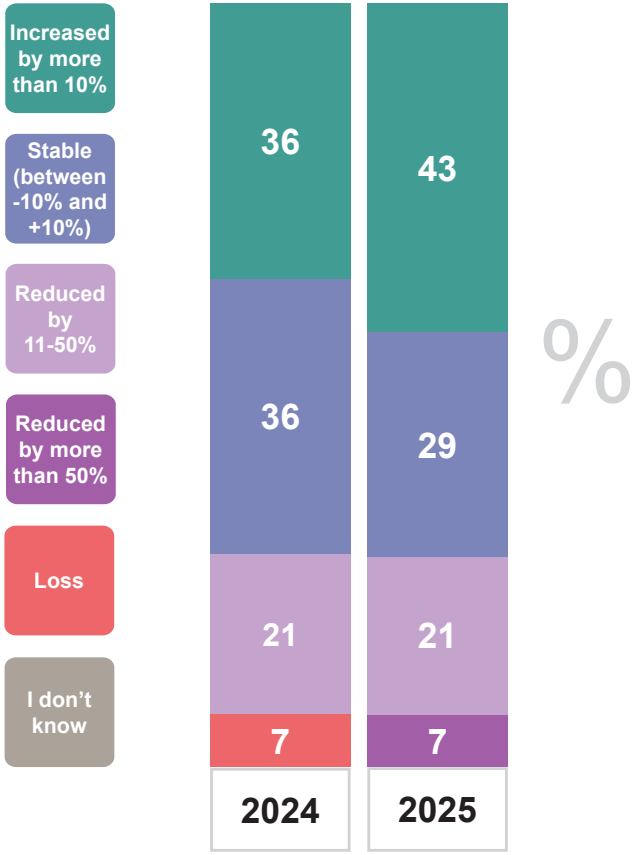




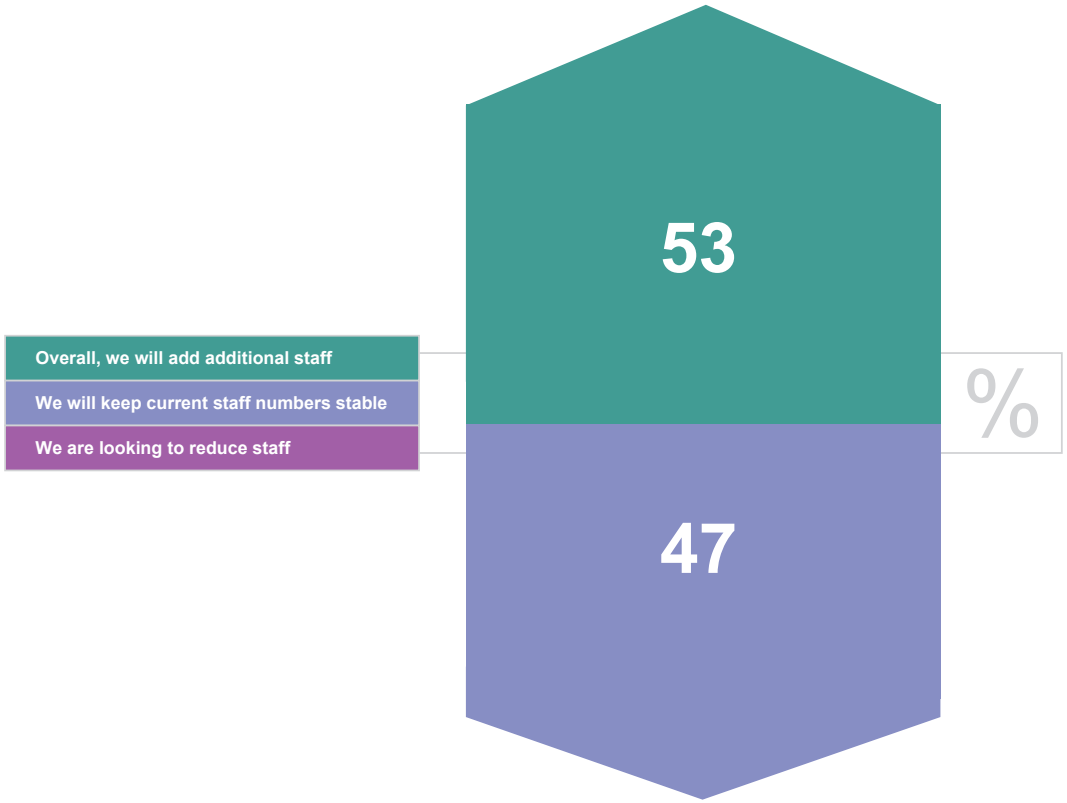

(15 answers in total)

# Detailed results for Brazil

## Operating Profits compared to the previous year




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

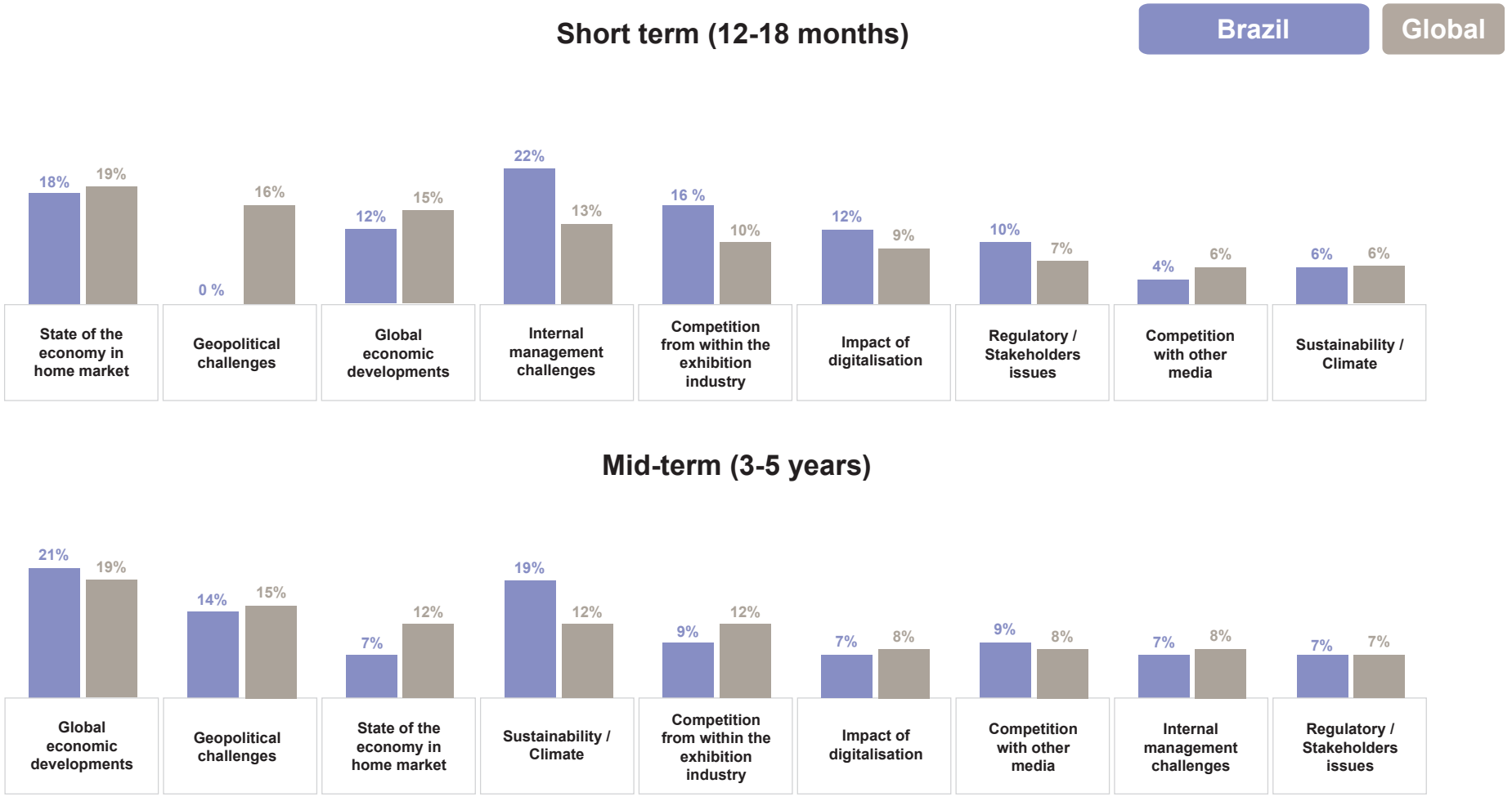





(15 answers in total)

# Detailed results for Brazil

## Most important business issues in the exhibition industry right now



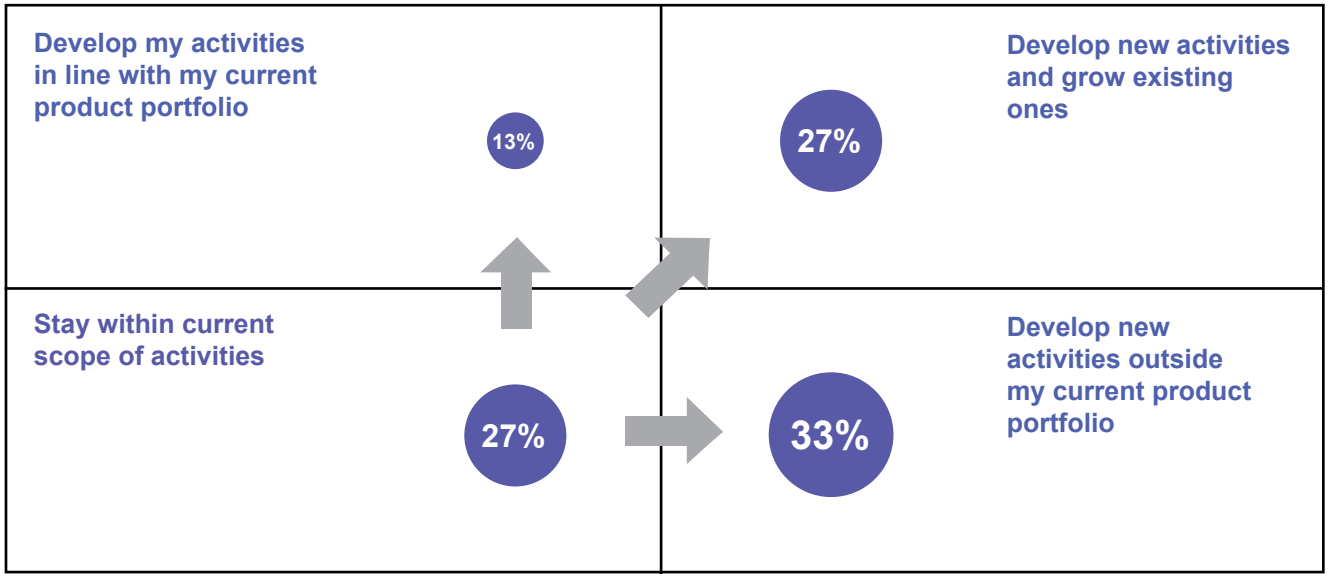



(15 answers in total)

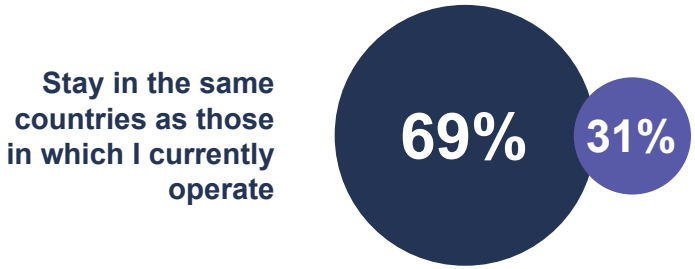
# Detailed results for Brazil

## Current Strategic Priorities Related To:

### Range of Activities



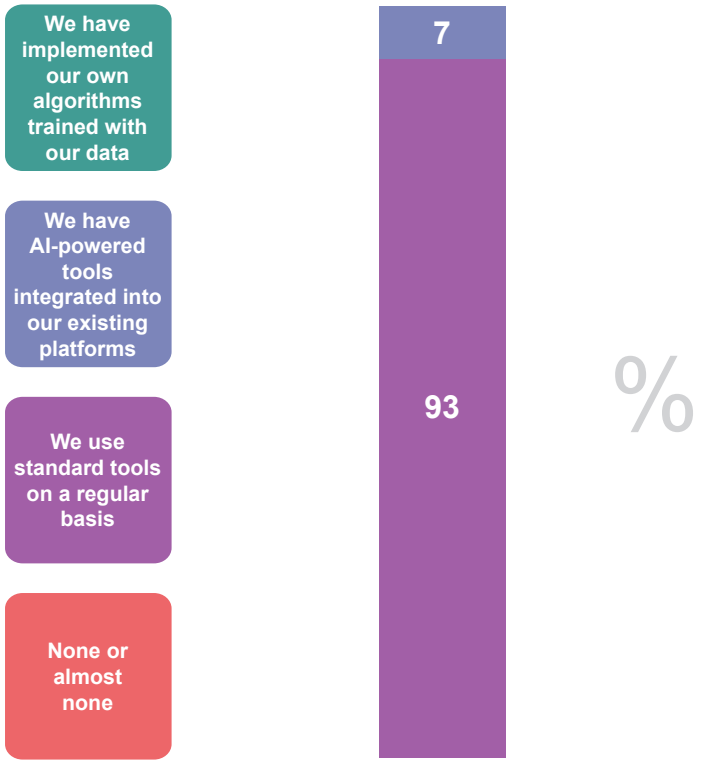

### Geographic Exposure



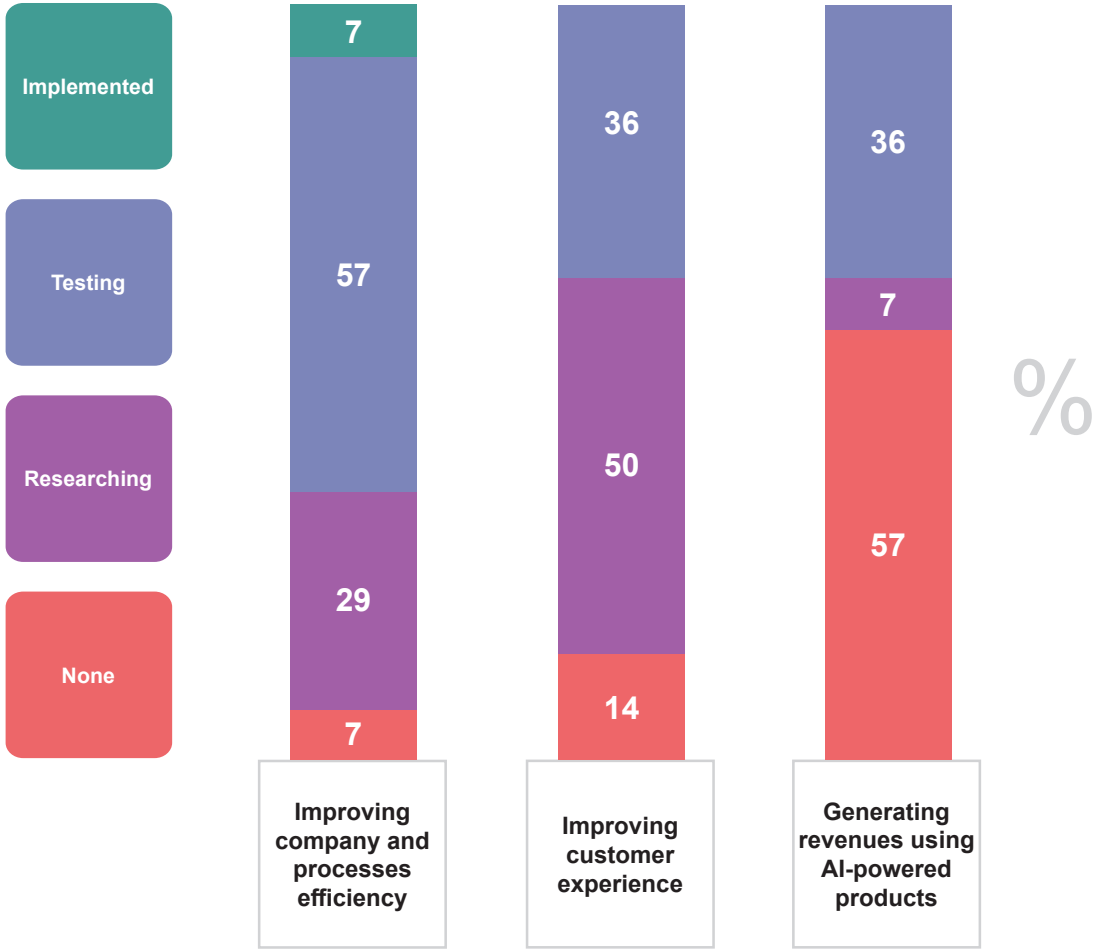
# Detailed results for Brazil

## Generative AI Applications

### Level of Implementation




### Level of Maturity

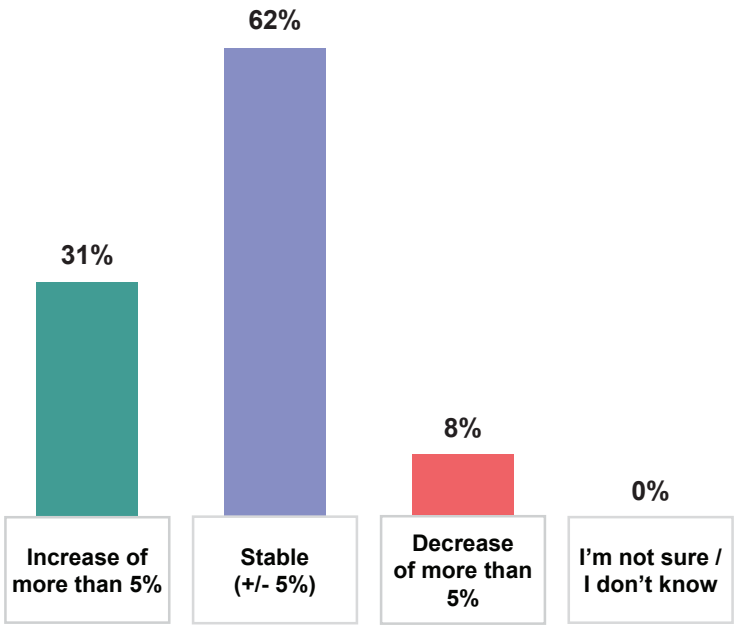




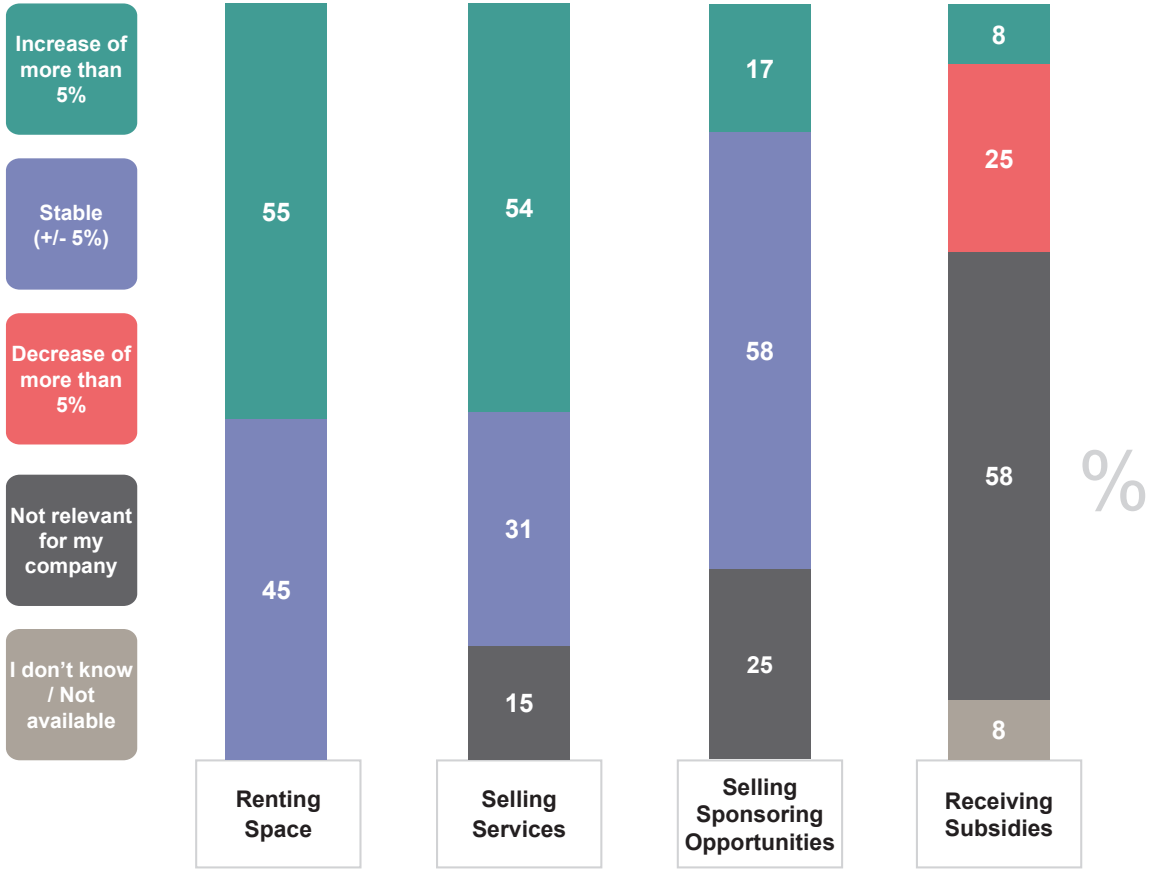

(15 answers in total)

# Detailed results for Colombia

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

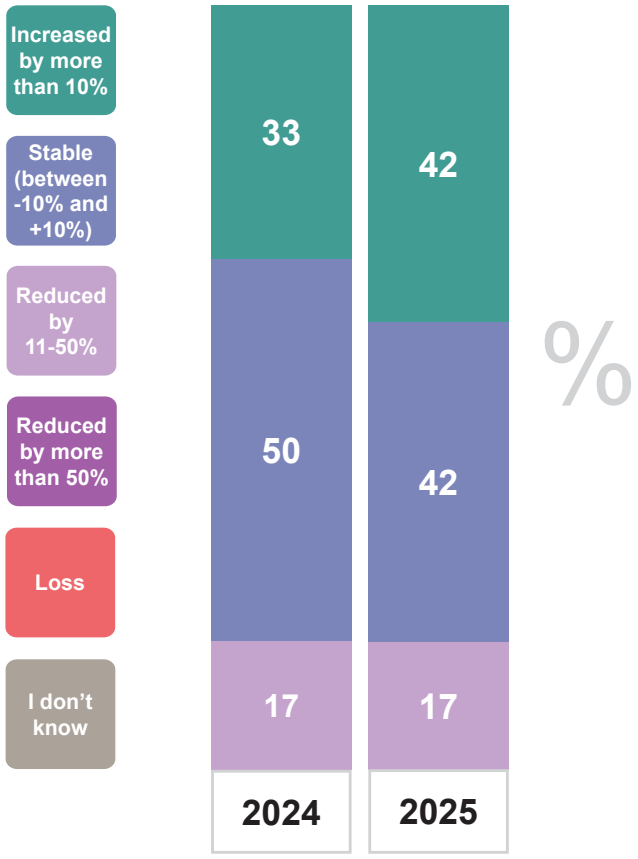




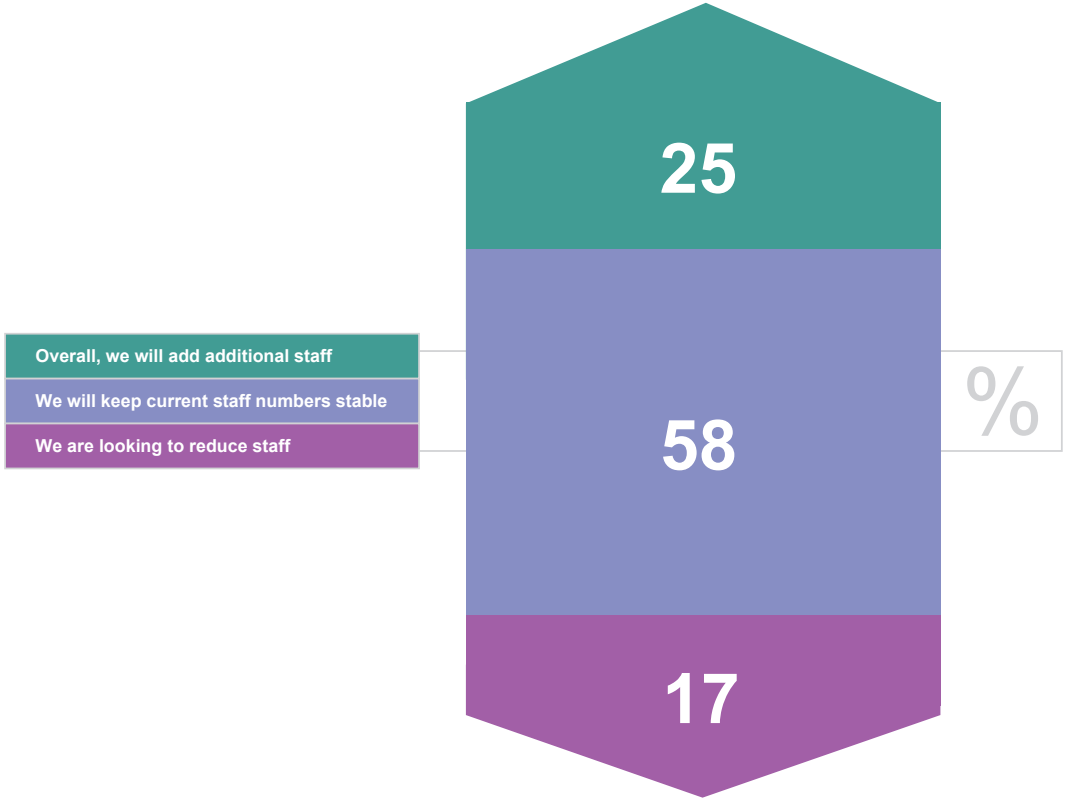

(13 answers in total)

# Detailed results for Colombia

## Operating Profits compared to the previous year




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

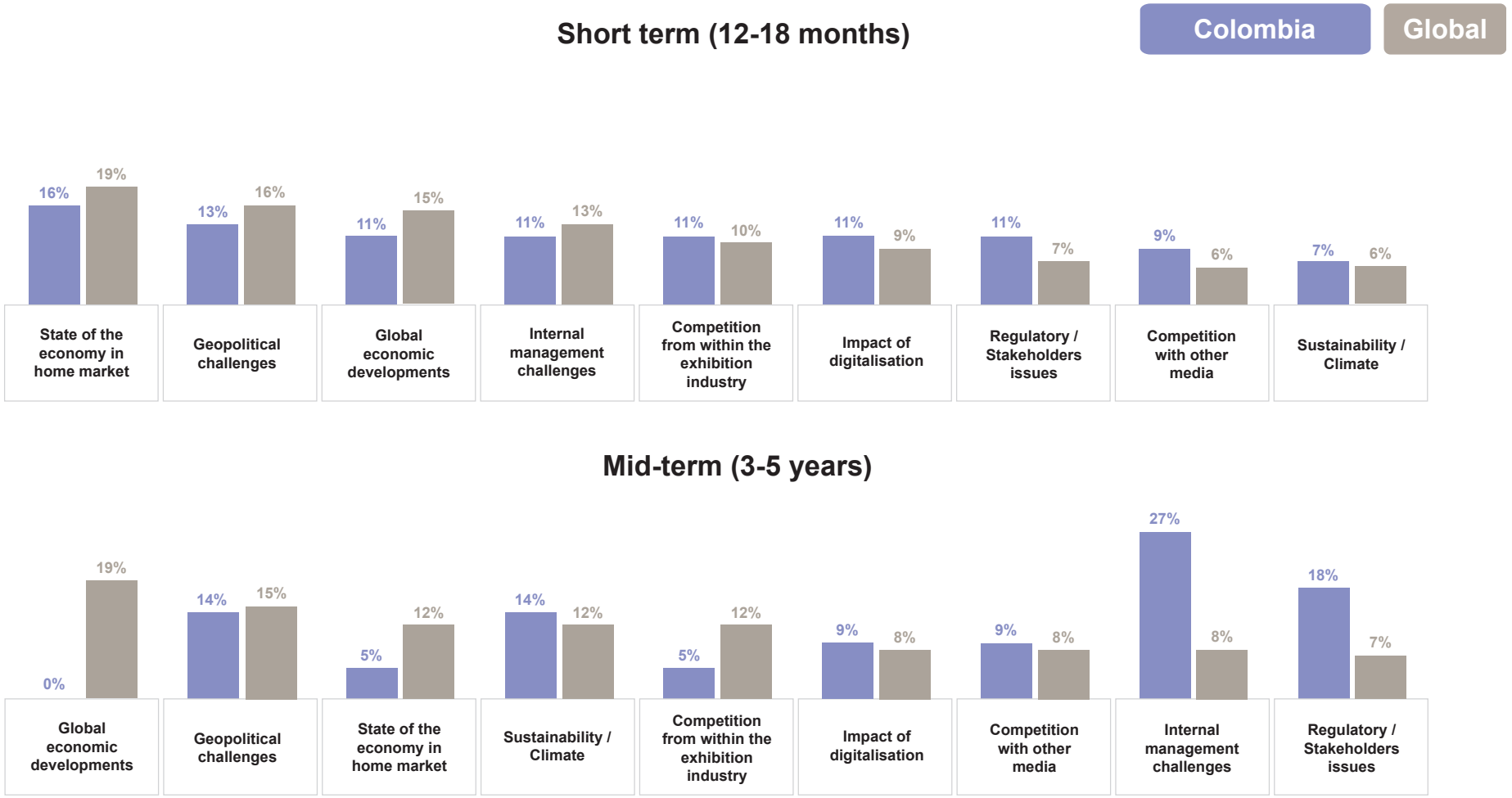





(13 answers in total)

# Detailed results for Colombia

## Most important business issues in the exhibition industry right now



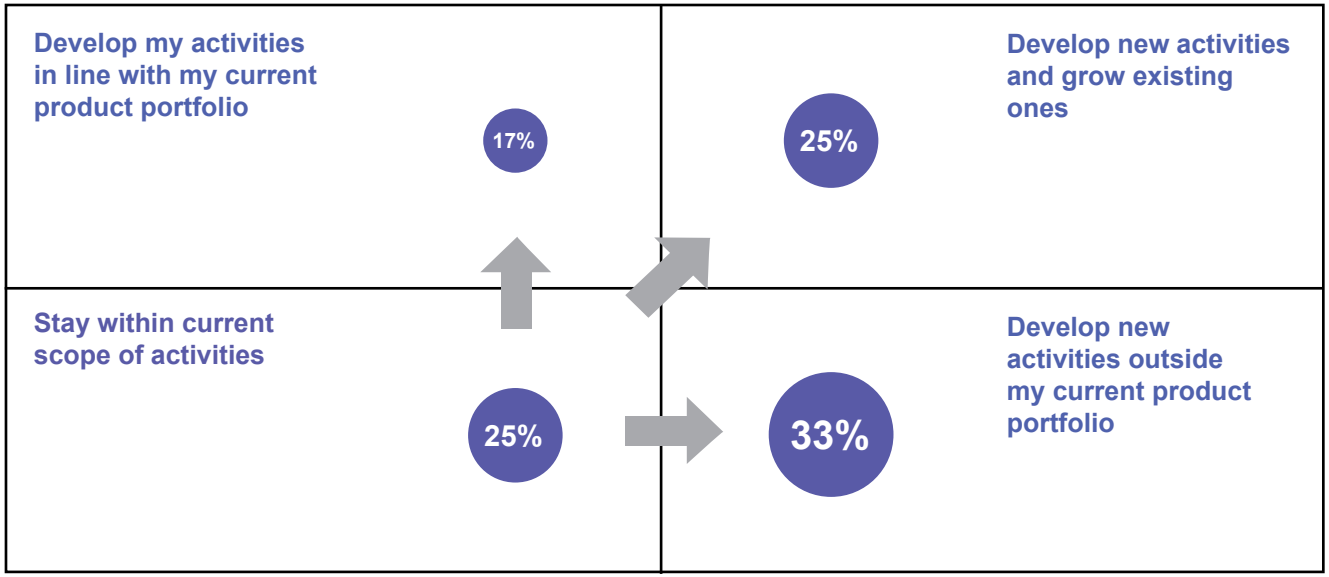



(13 answers in total)

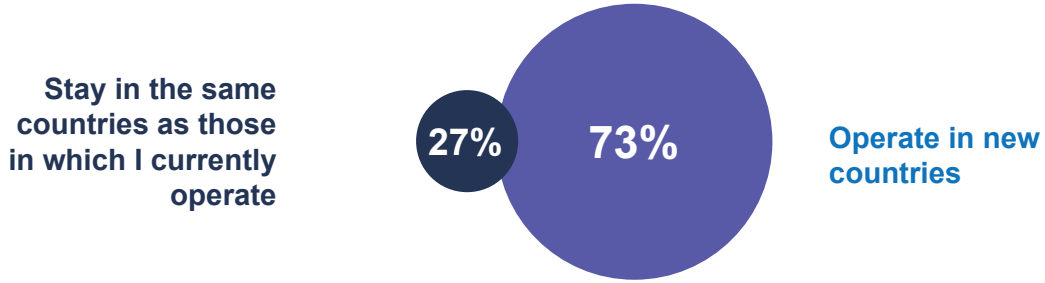
# Detailed results for Colombia

## Current Strategic Priorities Related To:

### Range of Activities



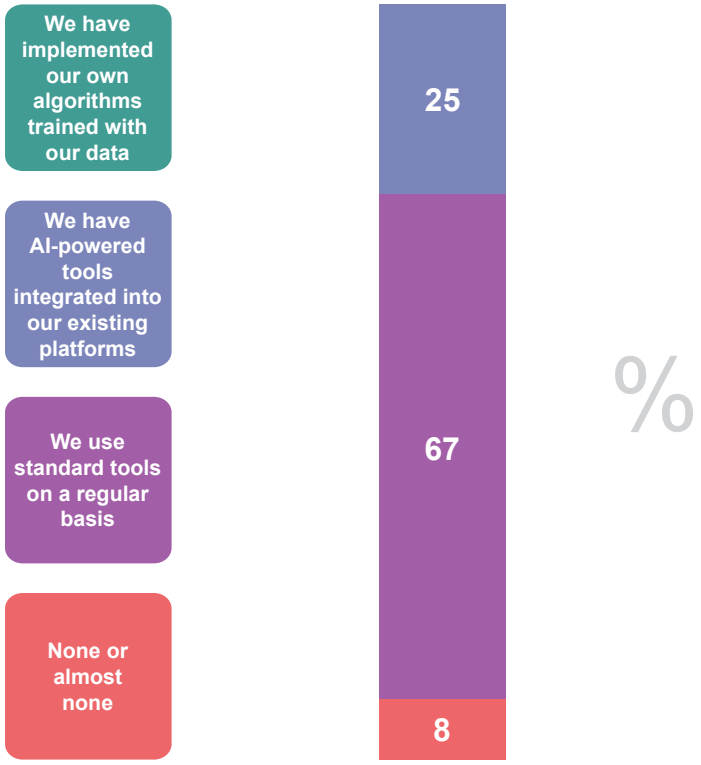

### Geographic Exposure



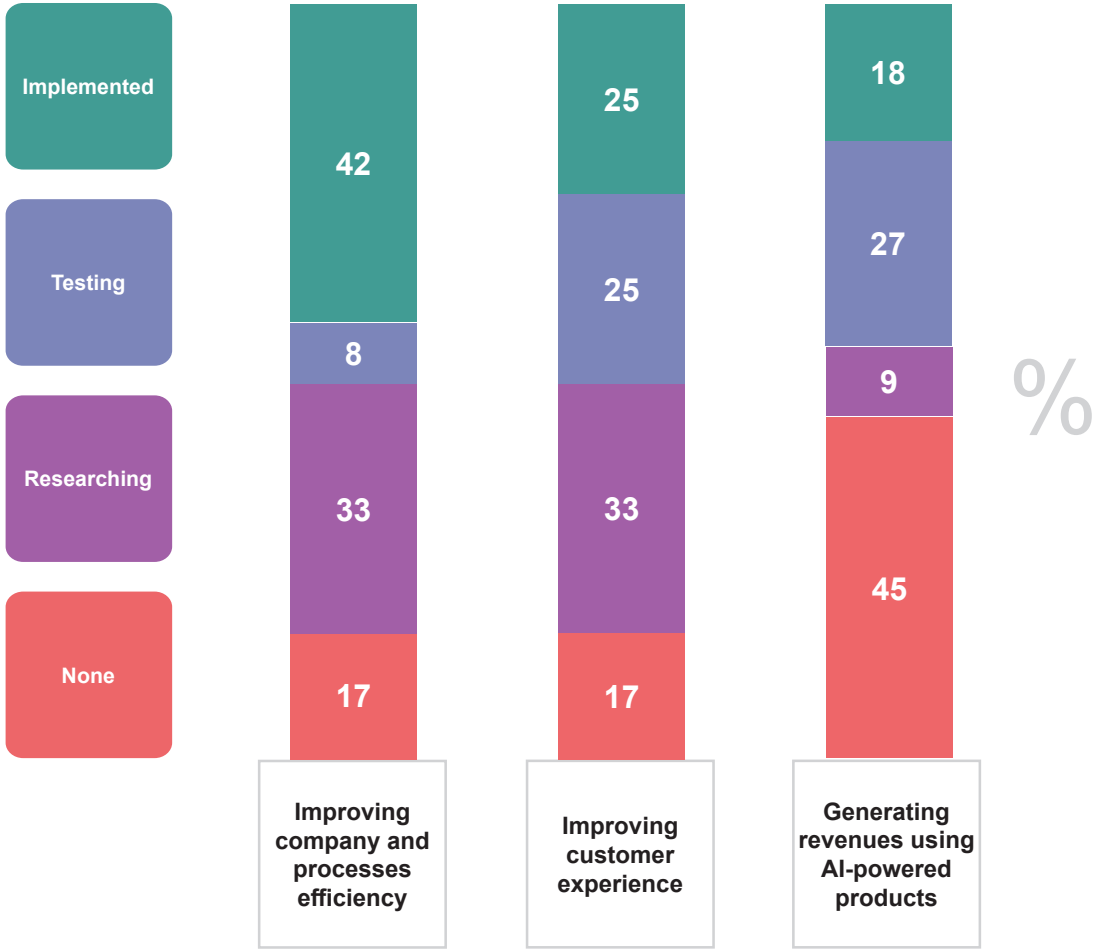
# Detailed results for Colombia

## Generative AI Applications

### Level of Implementation




### Level of Maturity





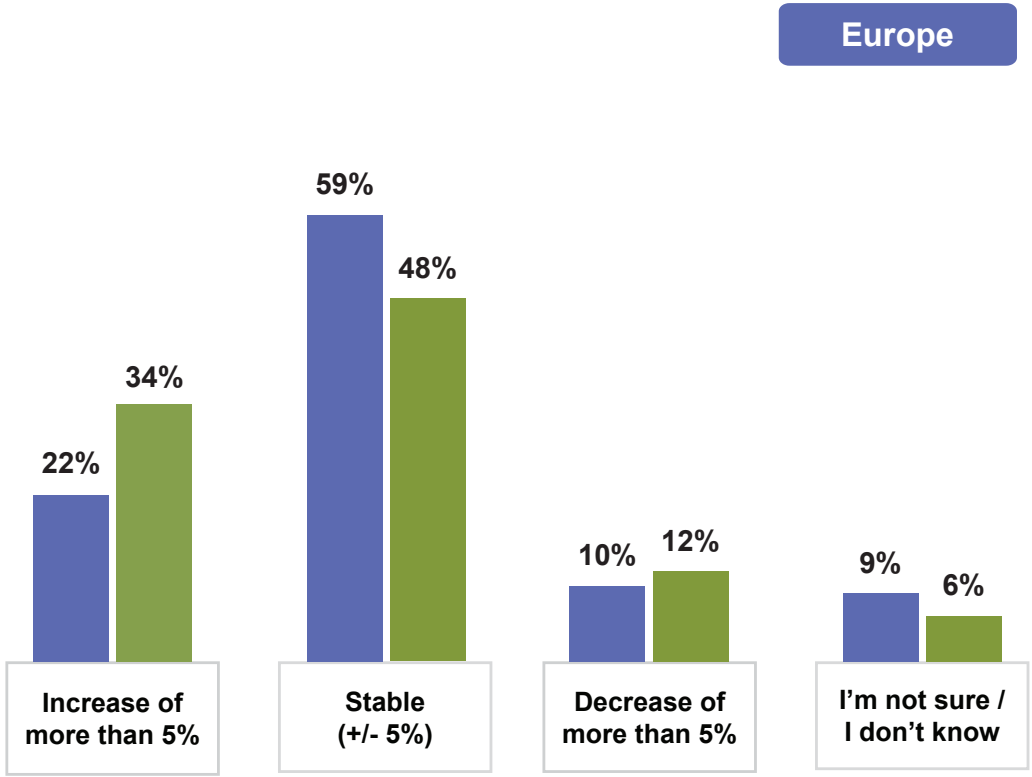

(13 answers in total)

Europe

# Rented Space
# Europe

The Global Association of the Exhibition Industry

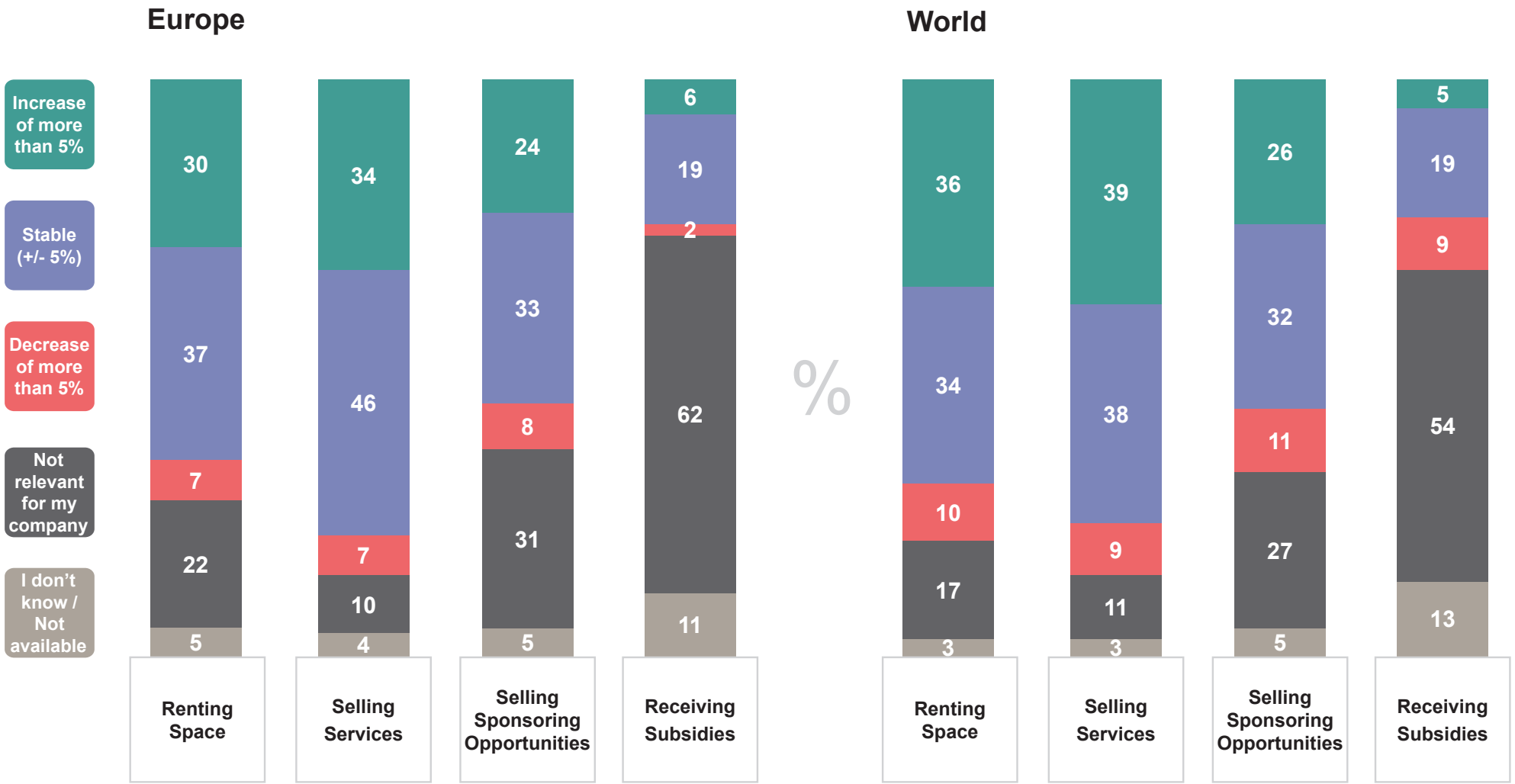
**Aggregated Country Forecast 2025 compared to 2024**



# Revenues
# Europe

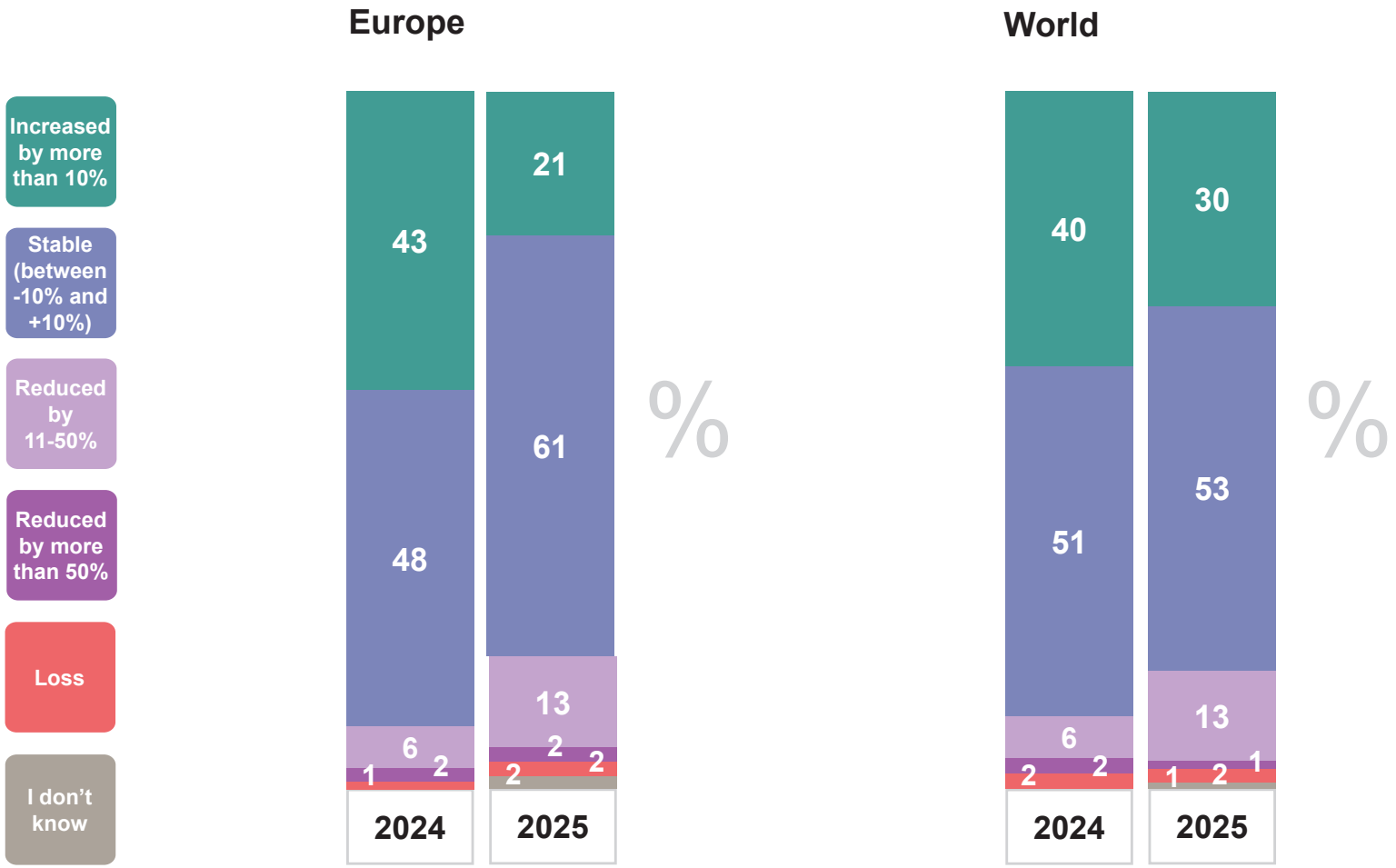
ufi The Global Association of the Exhibition Industry

## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



# Operating Profit
# Europe

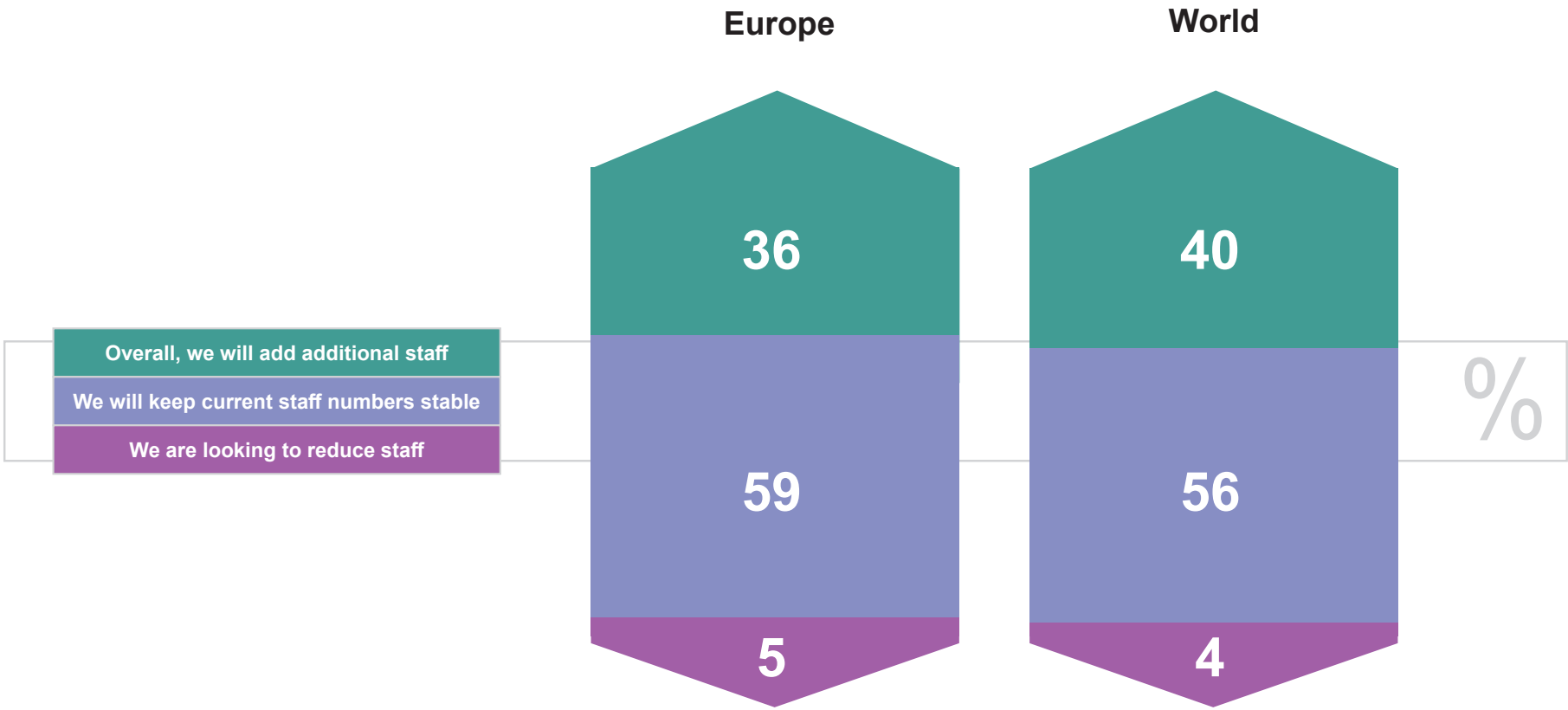
## Operating Profits
## compared to the previous year



# Workforce Europe

The Global Association of the Exhibition Industry

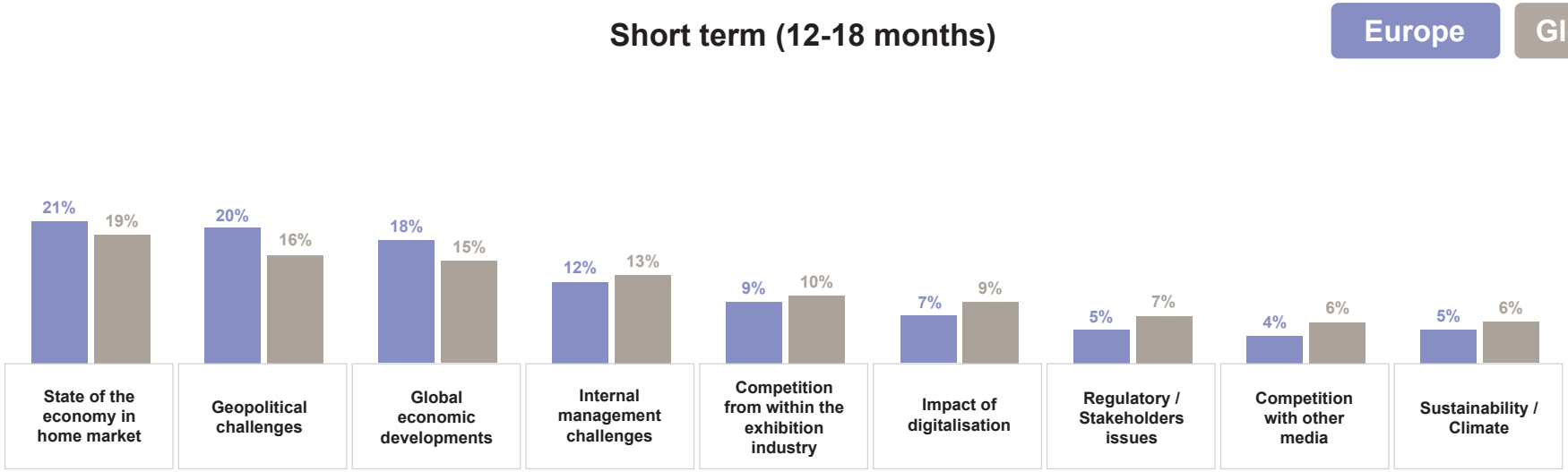
## How do you plan to develop your workforce in the coming 6 months



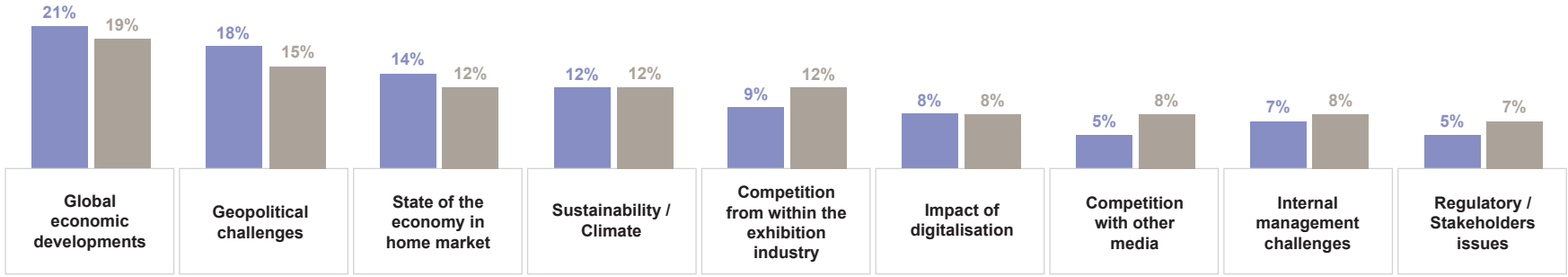
# Most Important Business Issues
# Europe

The Global Association of the Exhibition Industry

## Short term (12-18 months)



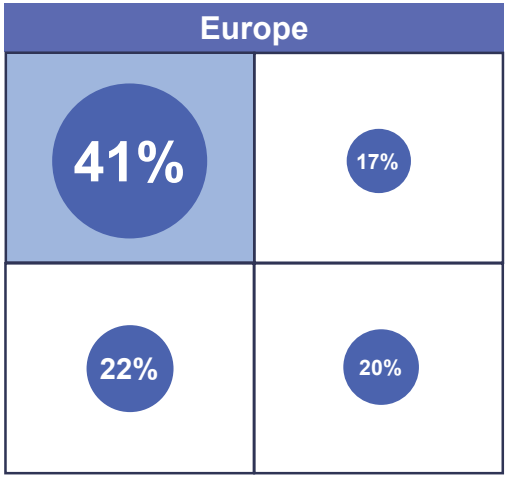

## Mid-term (3-5 years)

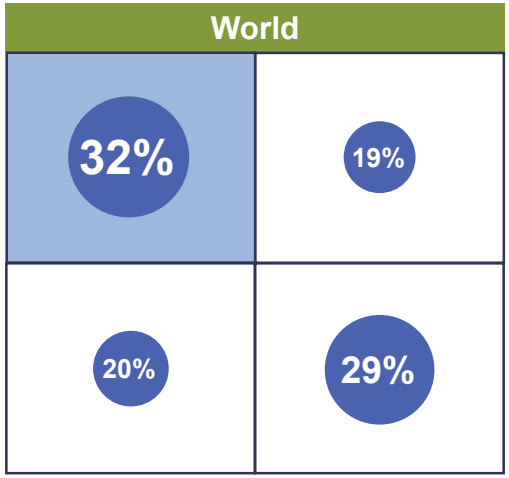


# Current Strategic Priorities
# Europe

## Range of Activities

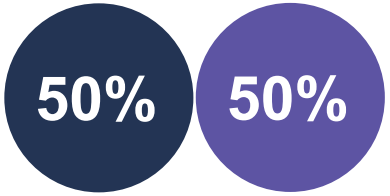
| Key | |
|---|---|
| Develop my activities in line with my current product portfolio | Develop new activities and grow existing ones |
| Stay within current scope of activities | Develop new activities outside my current product portfolio |




## Geographic Exposure

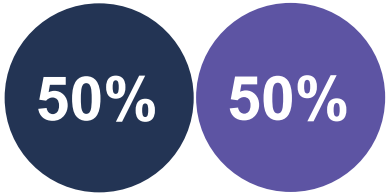
### Europe




Stay in the same countries as those in which I currently operate

Operate in new countries

### World



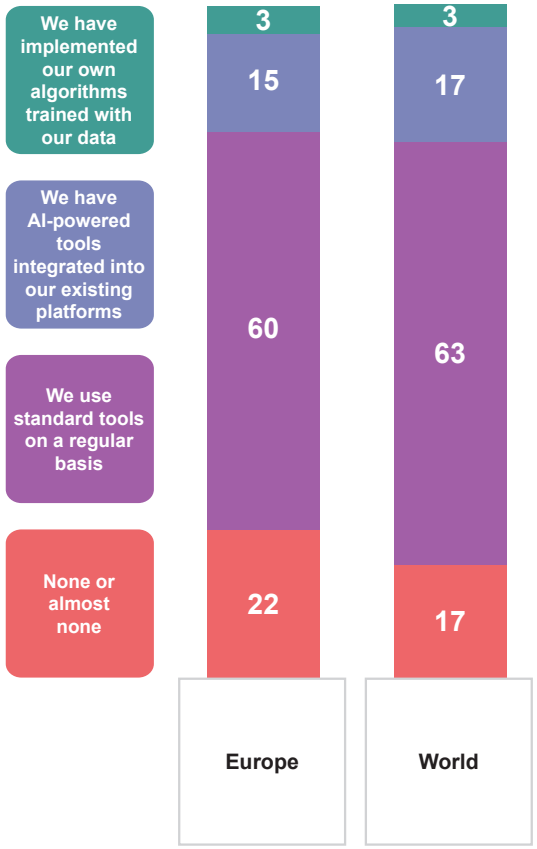

Stay in the same countries as those in which I currently operate

Operate in new countries

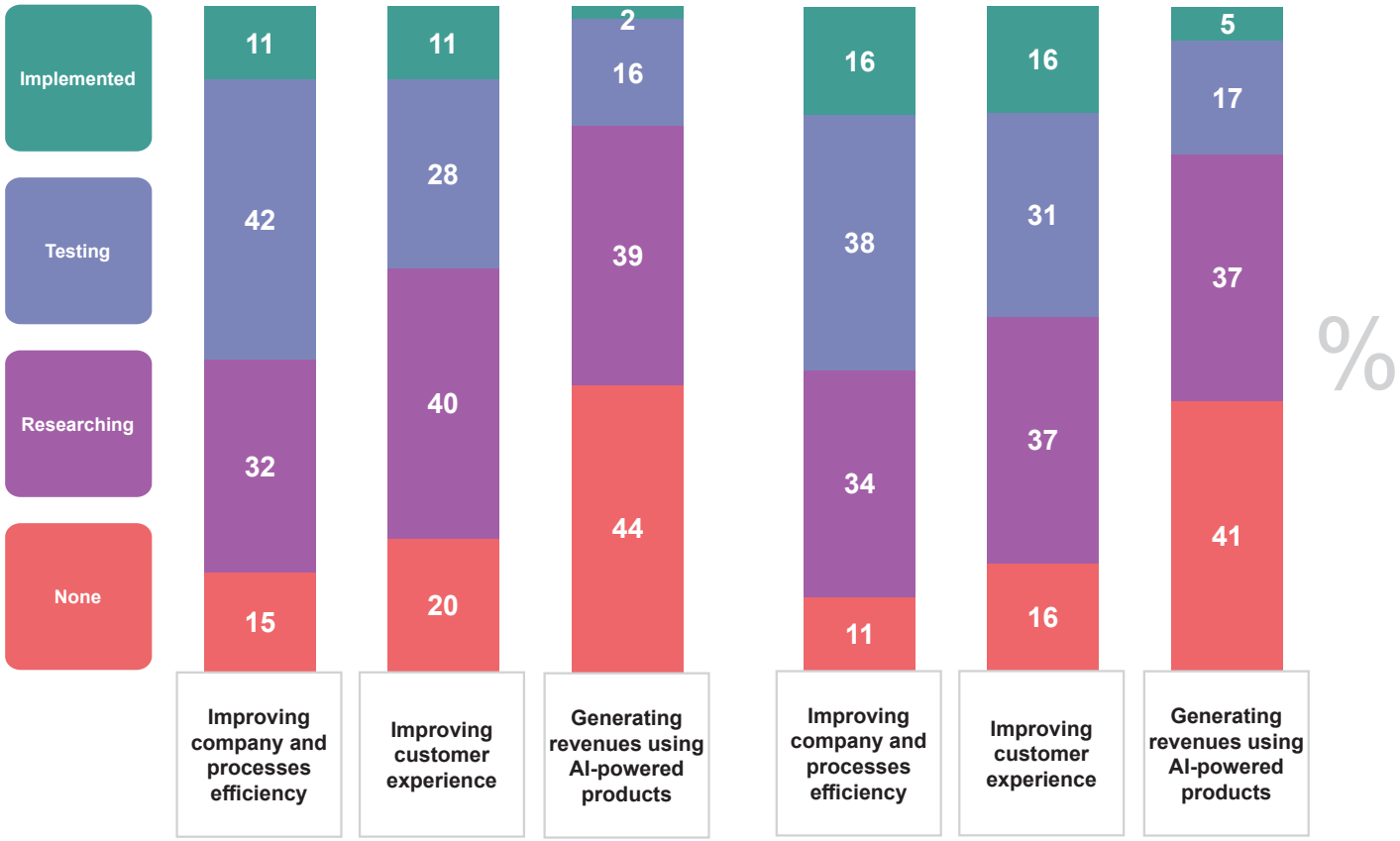
# Generative AI Applications
# Europe

ufi The Global Association of the Exhibition Industry

## Level of Implementation

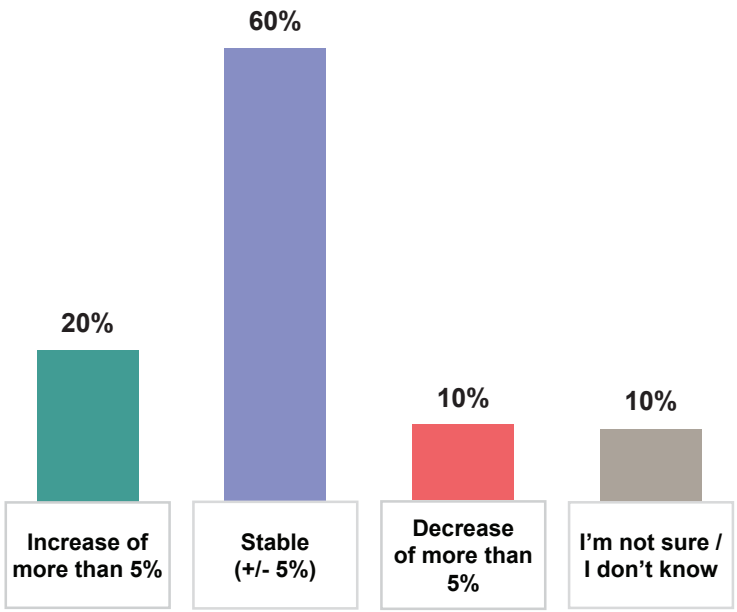



## Level of Maturity



# Detailed results for France

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024

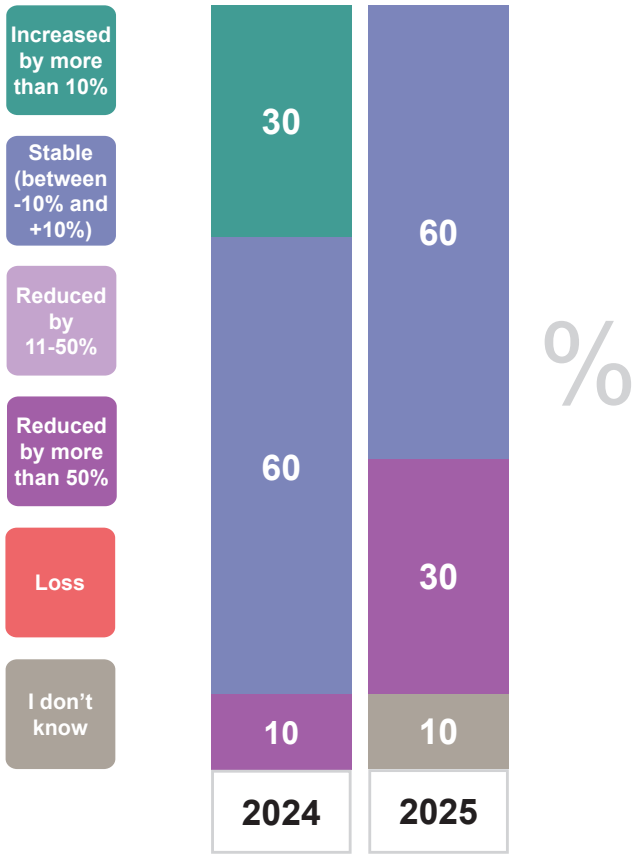



## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

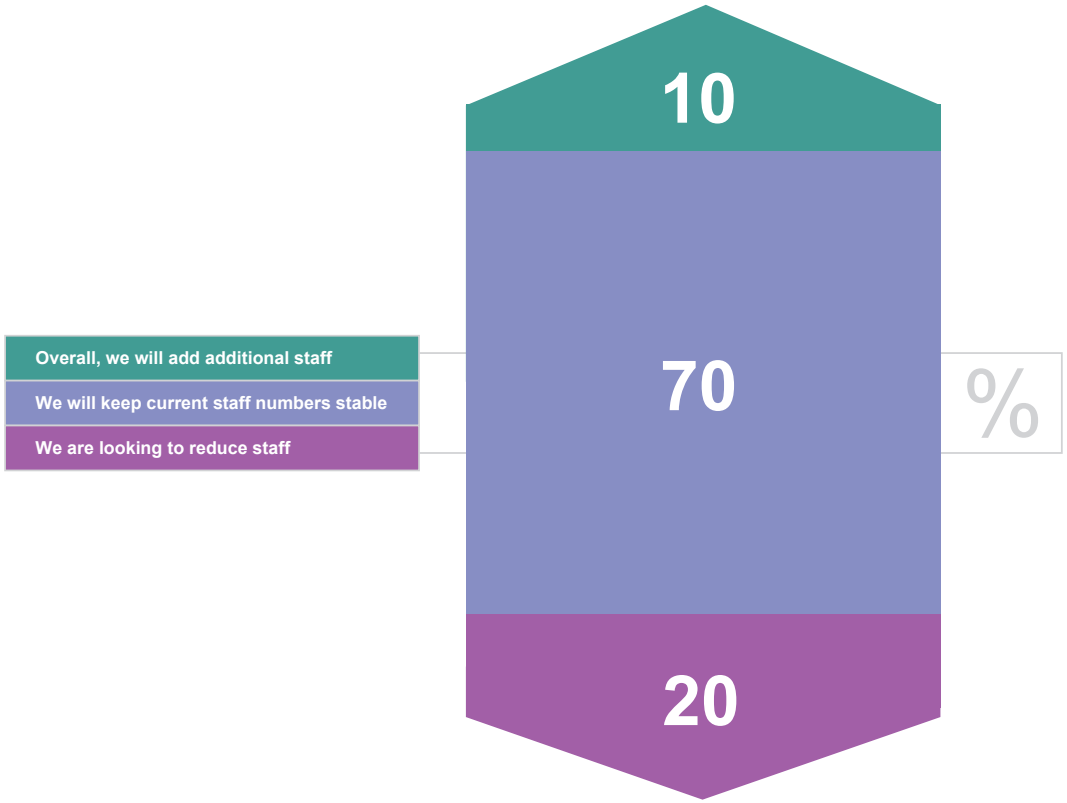
(10 answers in total)

# Detailed results for France

## Operating Profits compared to the previous year




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

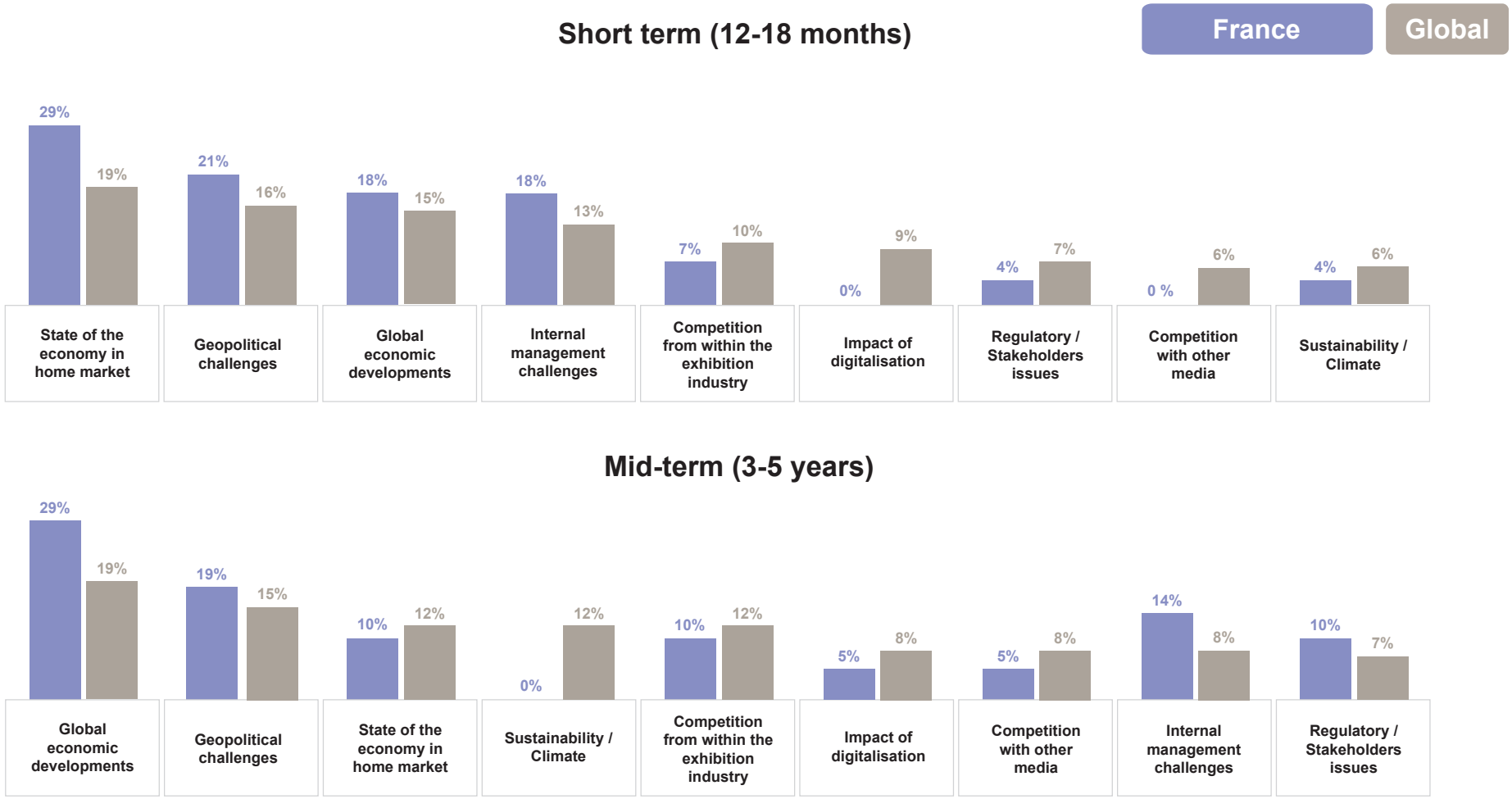





(10 answers in total)

# Detailed results for France

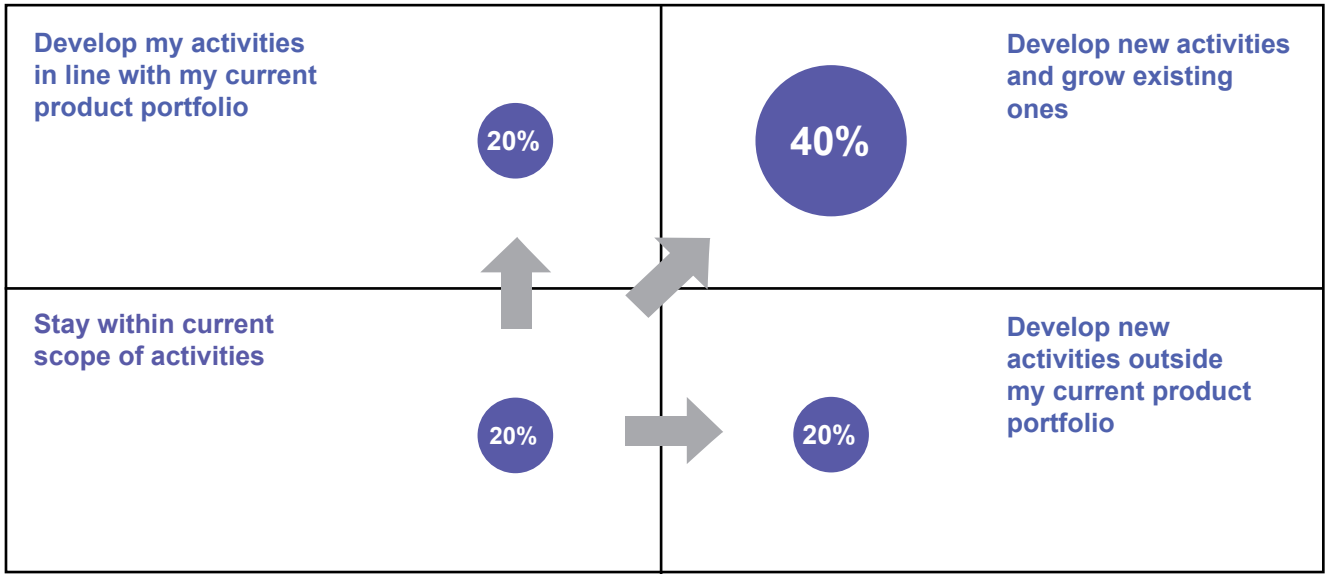
## Most important business issues in the exhibition industry right now



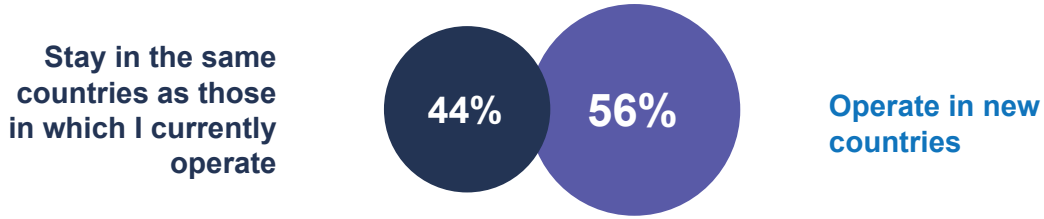
# Detailed results for France

## Current Strategic Priorities Related To:

### Range of Activities



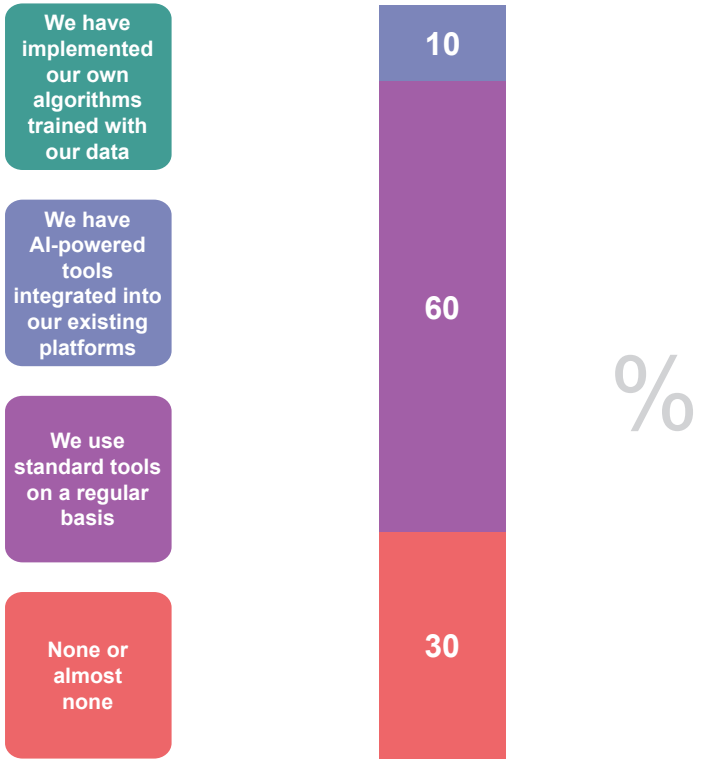

### Geographic Exposure



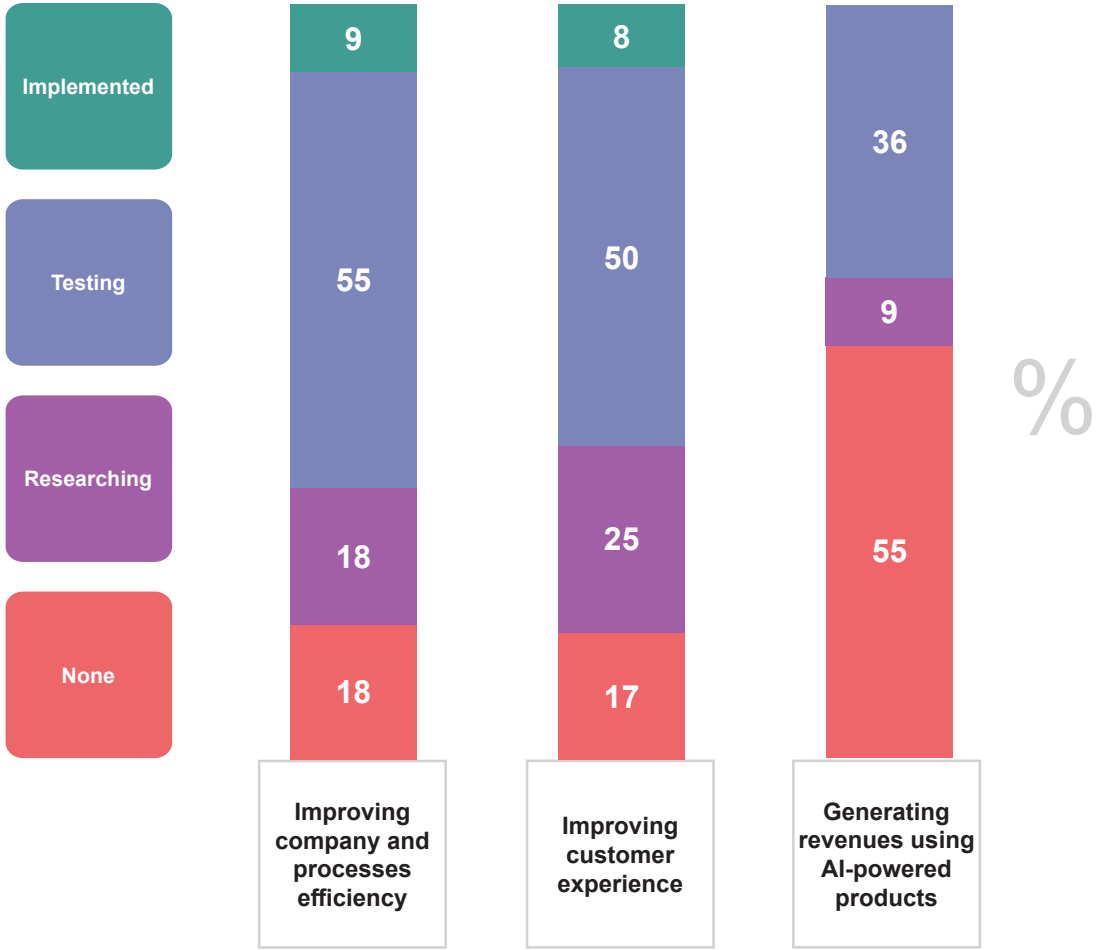
# Detailed results for France

## Generative AI Applications

### Level of Implementation




### Level of Maturity

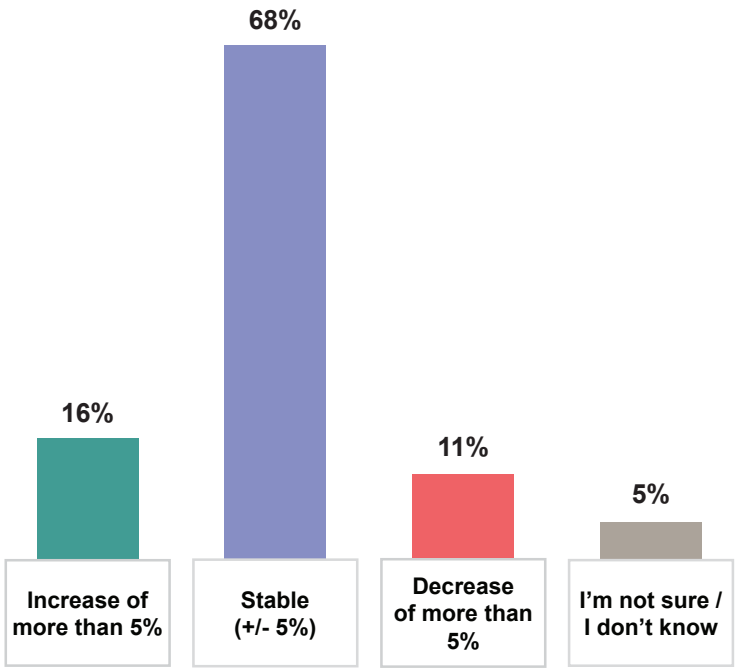




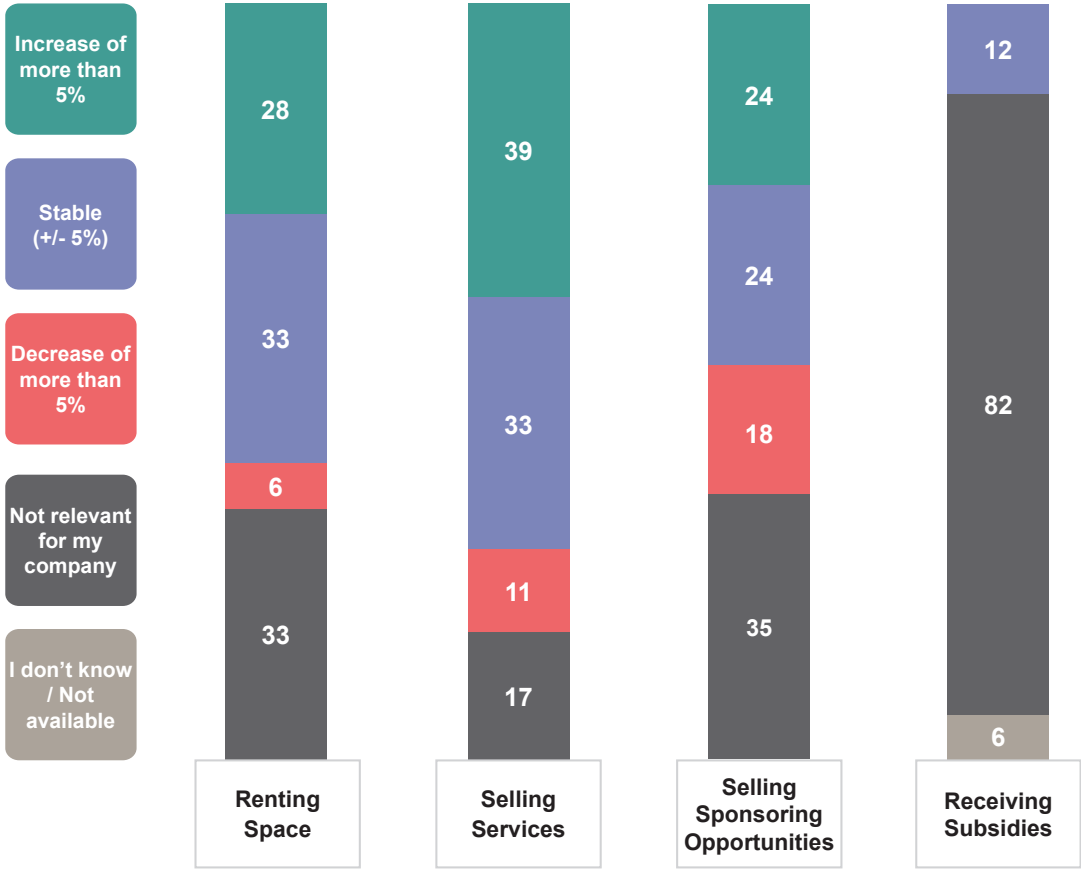

(10 answers in total)

# Detailed results for Germany

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

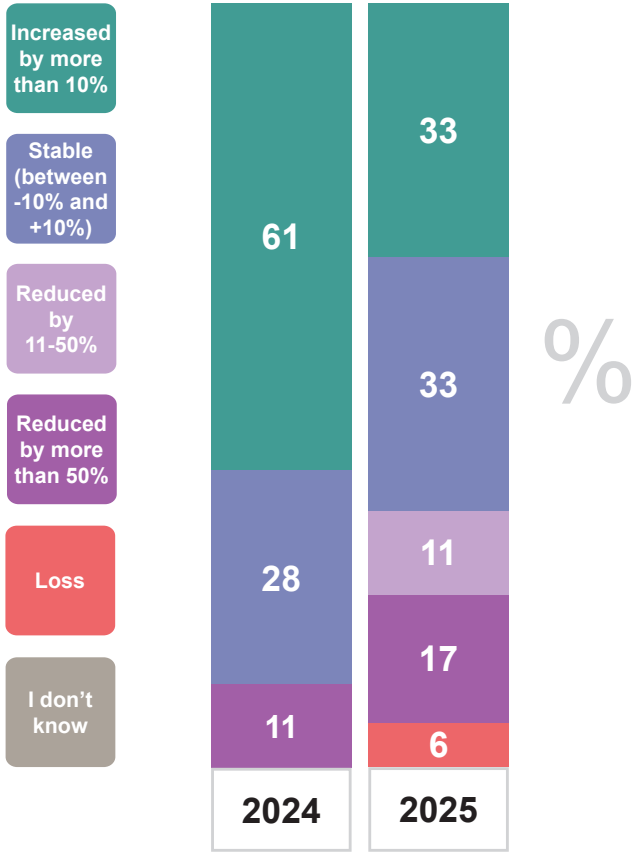




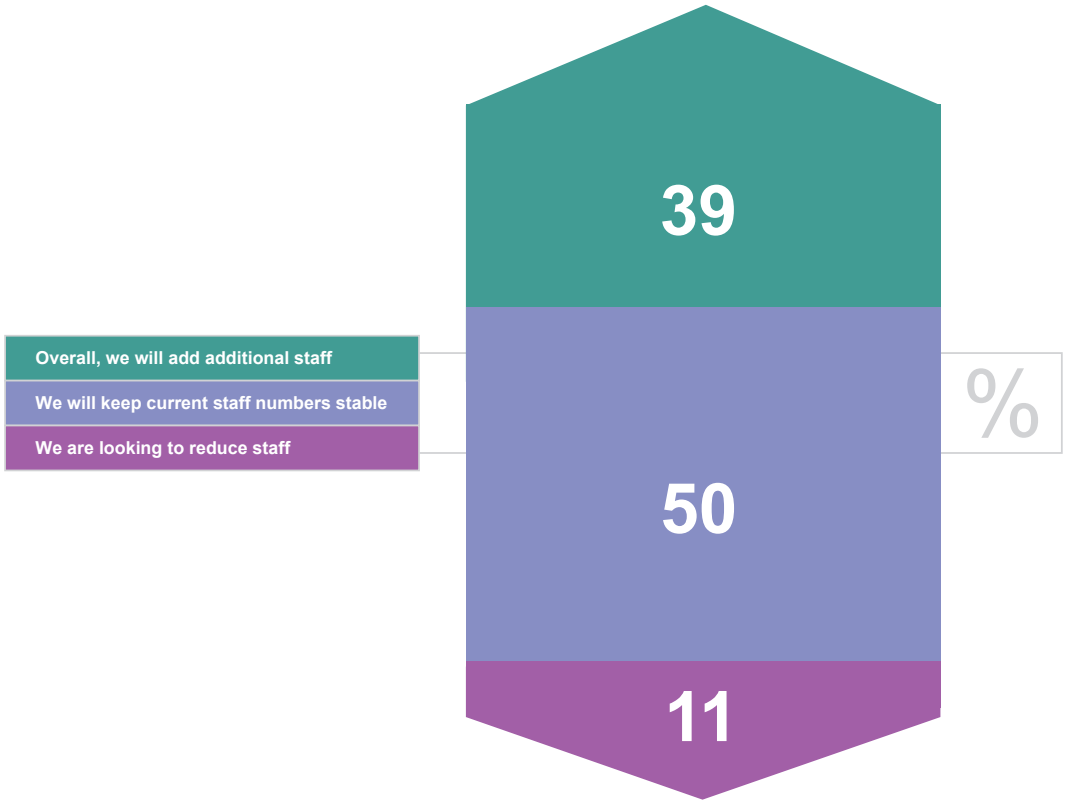

(19 answers in total)

# Detailed results for Germany

## Operating Profits compared to the previous year




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

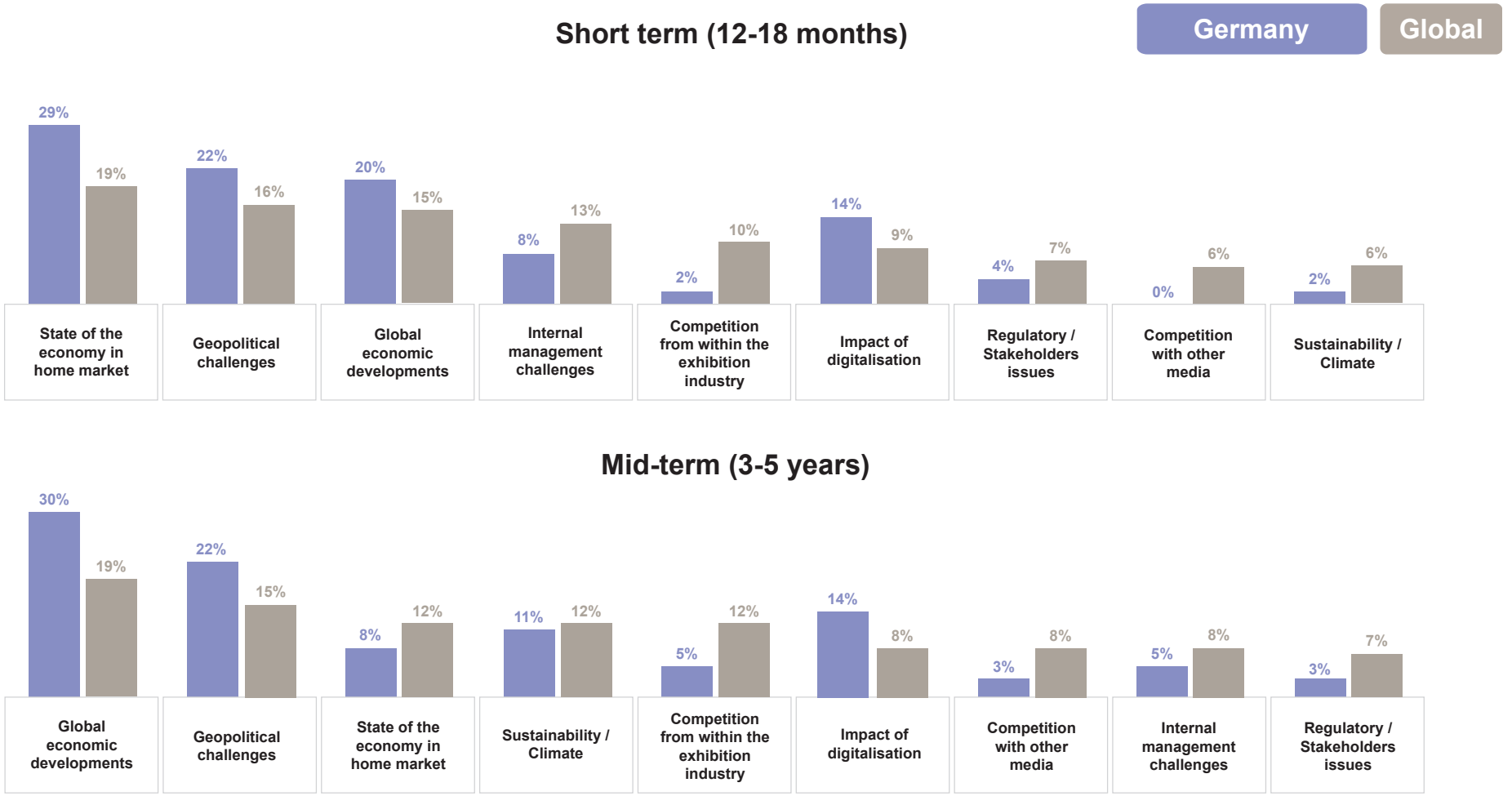





(19 answers in total)

# Detailed results for Germany

## Most important business issues in the exhibition industry right now



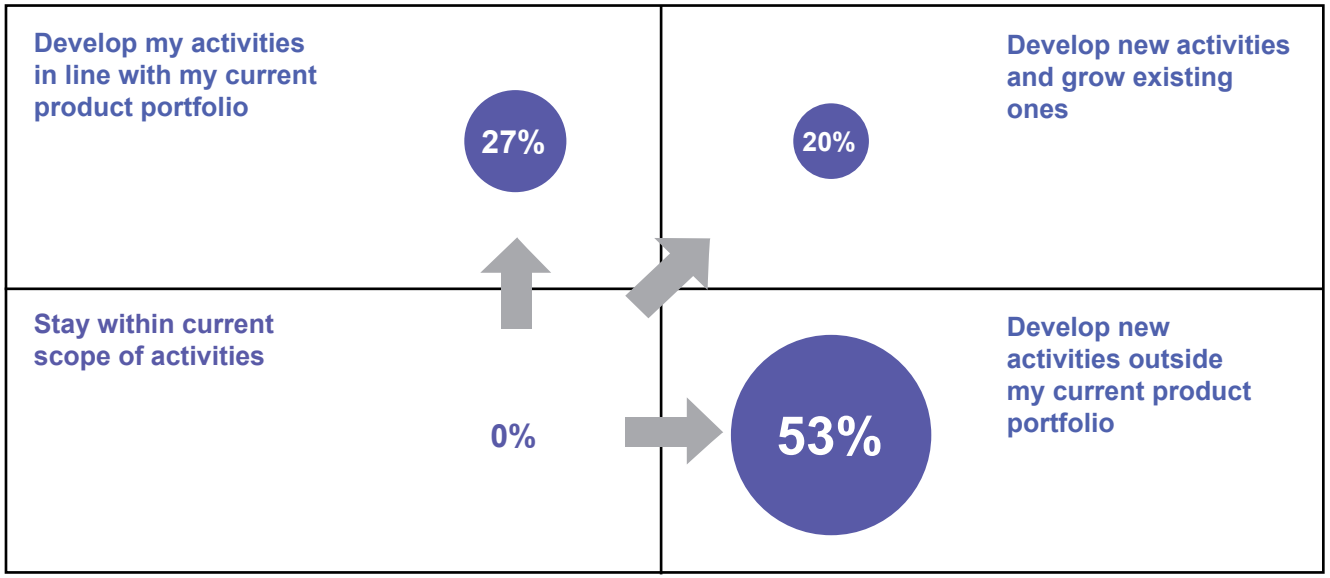



(19 answers in total)

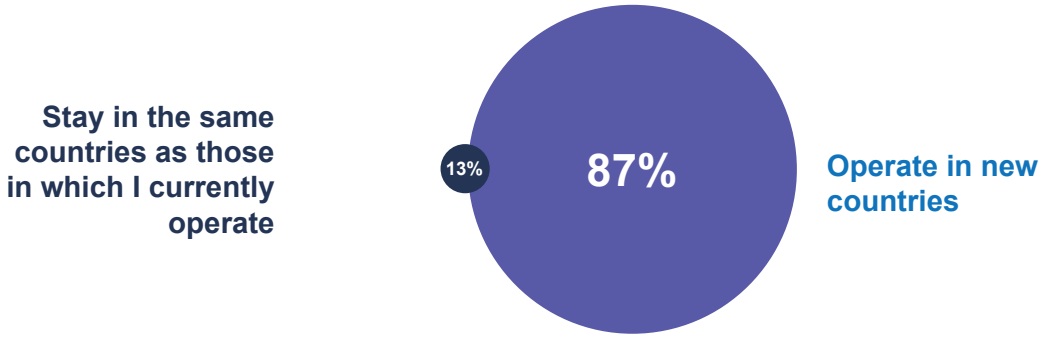
# Detailed results for Germany

## Current Strategic Priorities Related To:

### Range of Activities



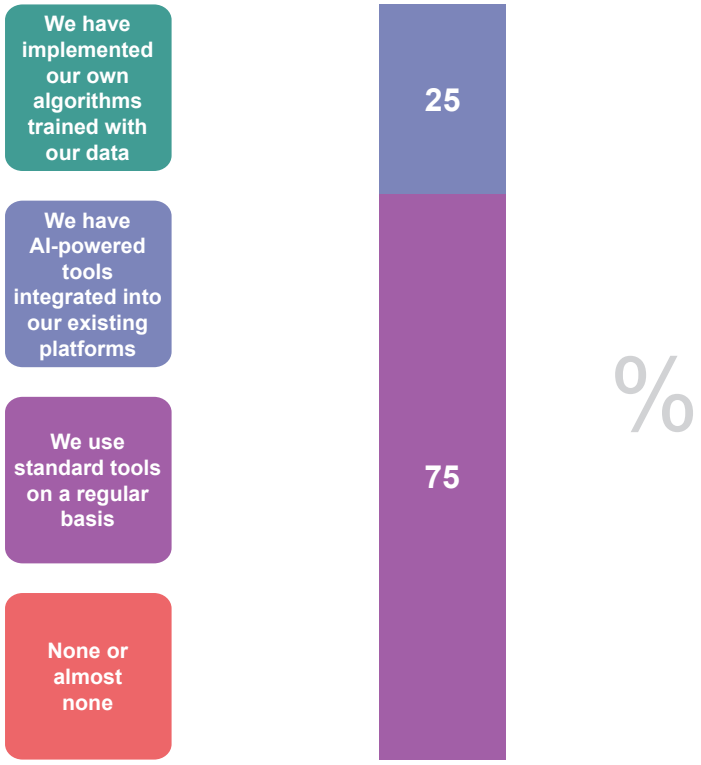

### Geographic Exposure



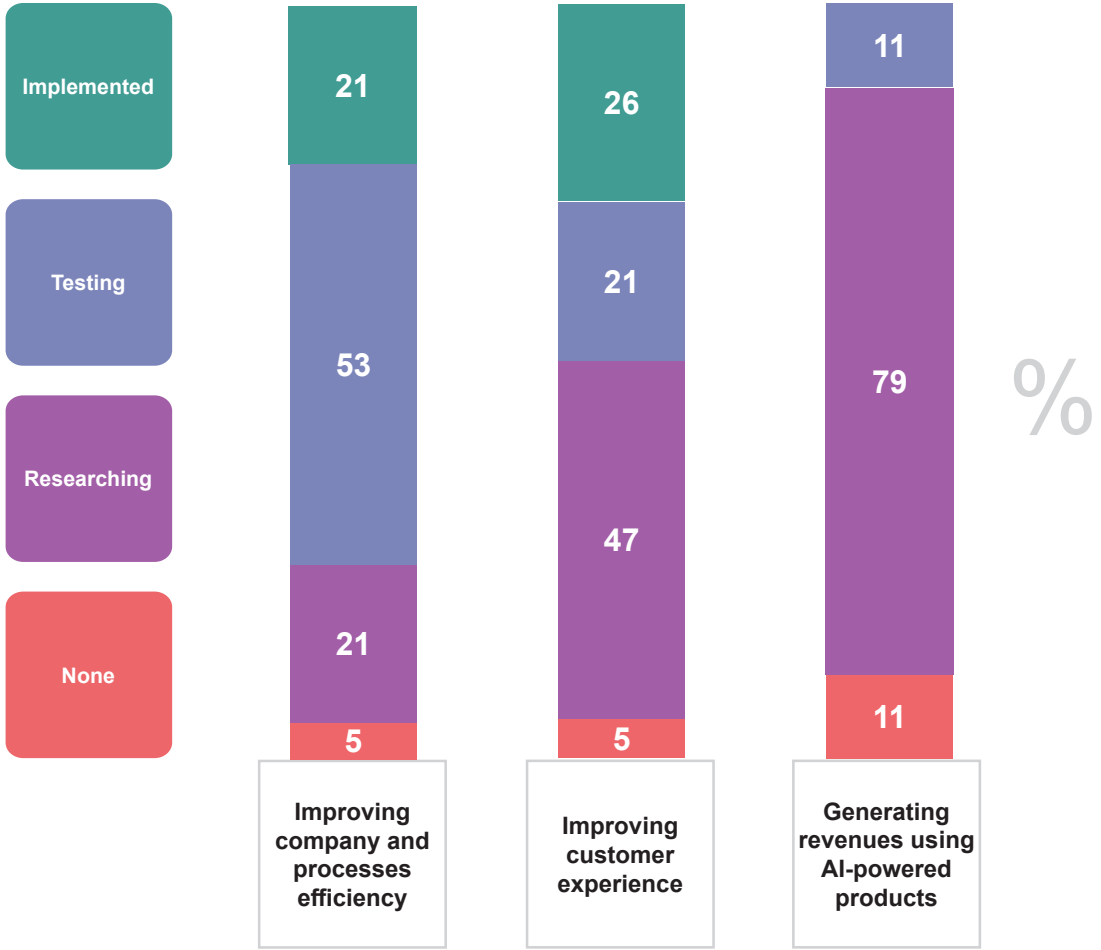
# Detailed results for Germany

## Generative AI Applications

### Level of Implementation




### Level of Maturity

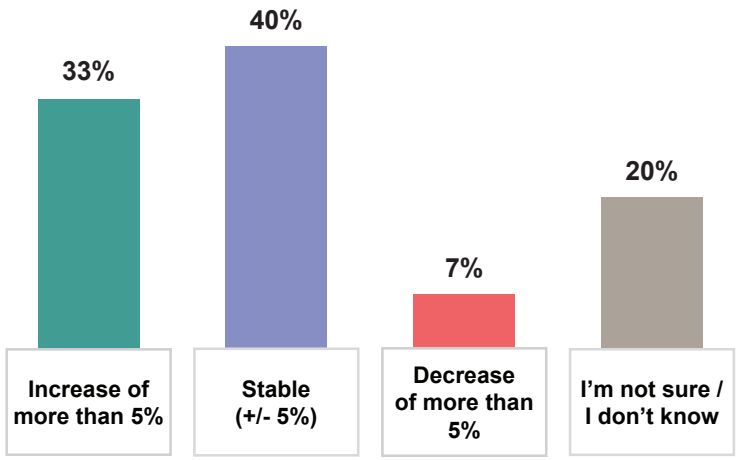




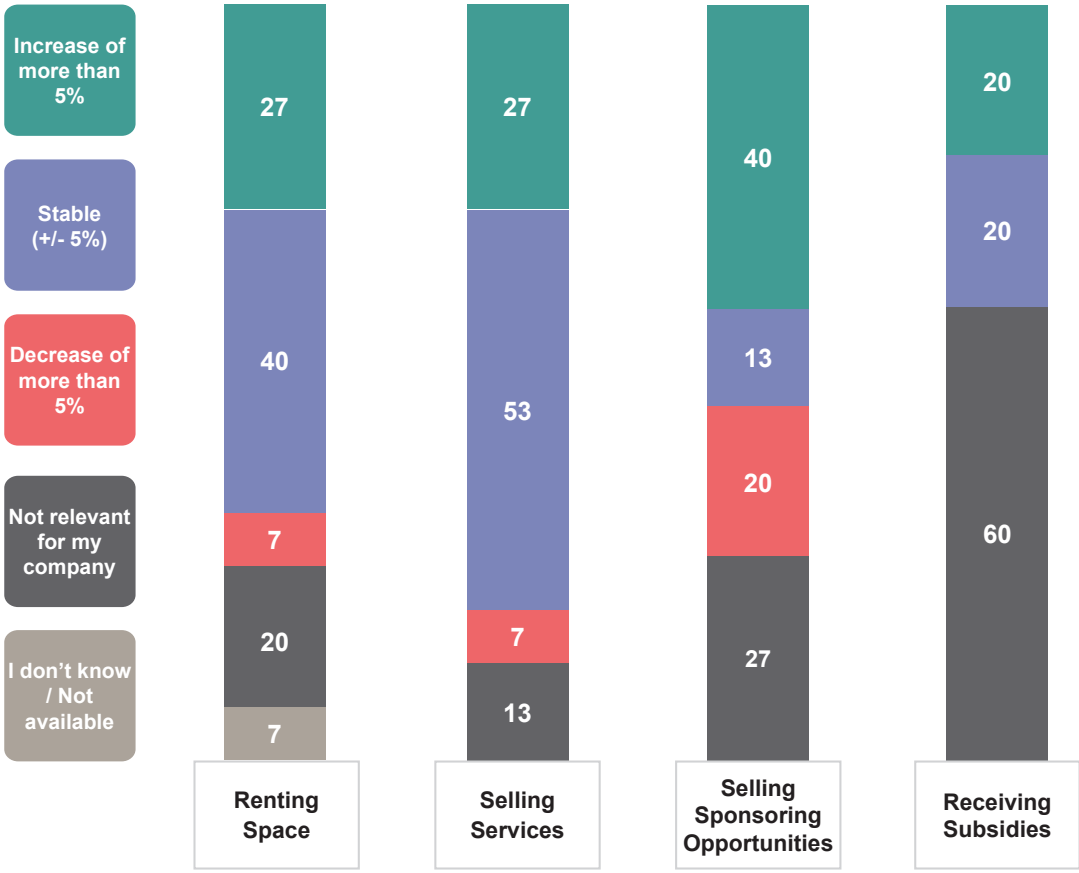

(19 answers in total)

# Detailed results for Greece

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category



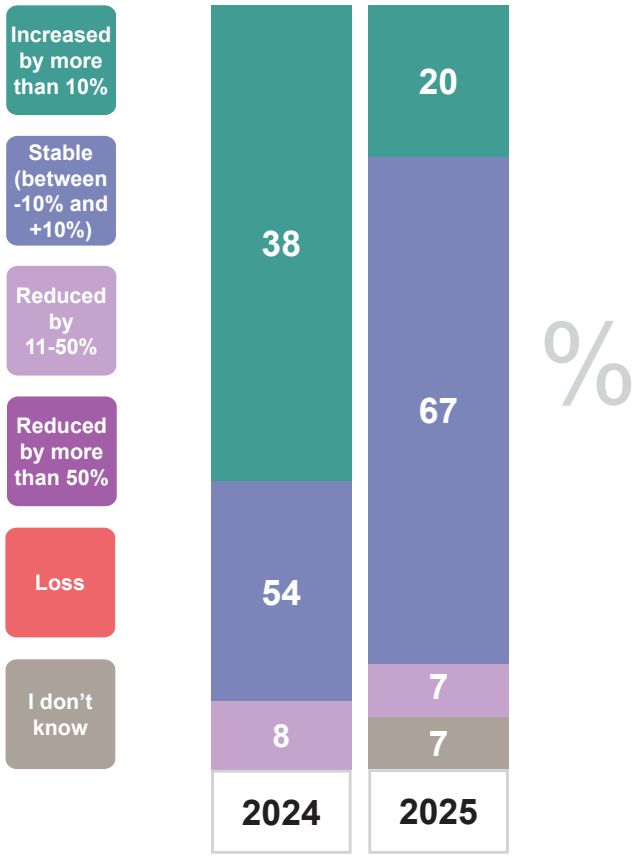



(15 answers in total)

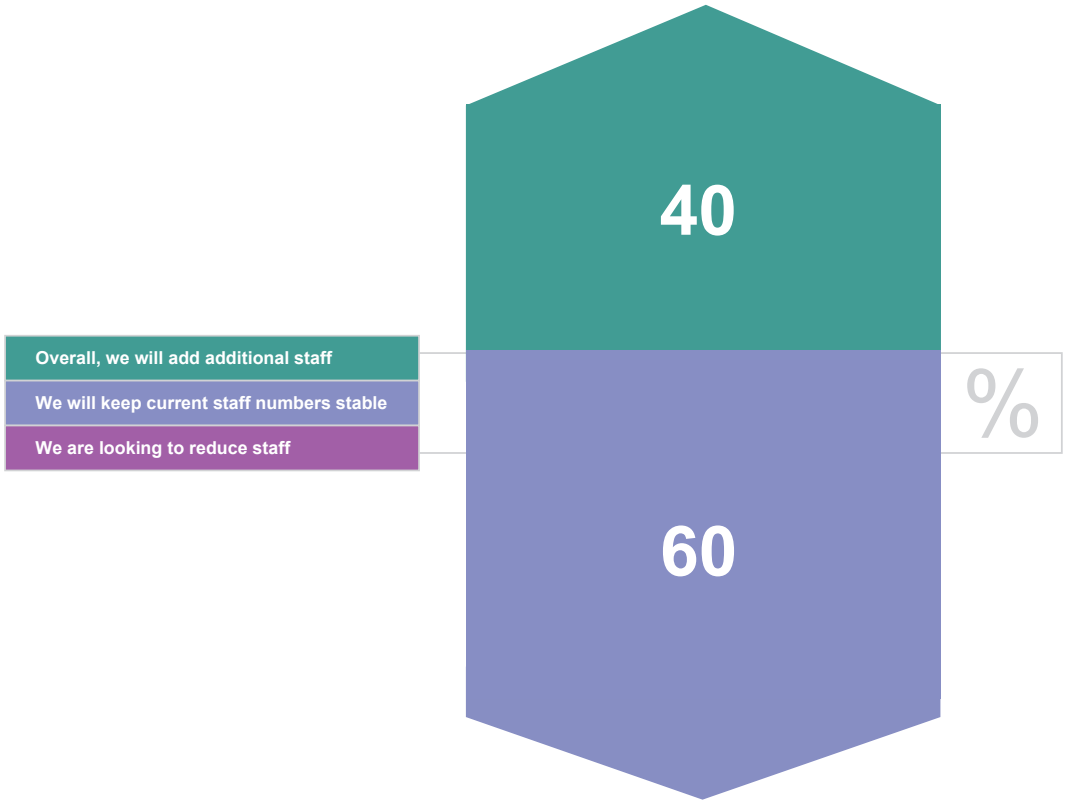
# Detailed results for Greece

ufi The Global Association of the Exhibition Industry

## Operating Profits compared to the previous year




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

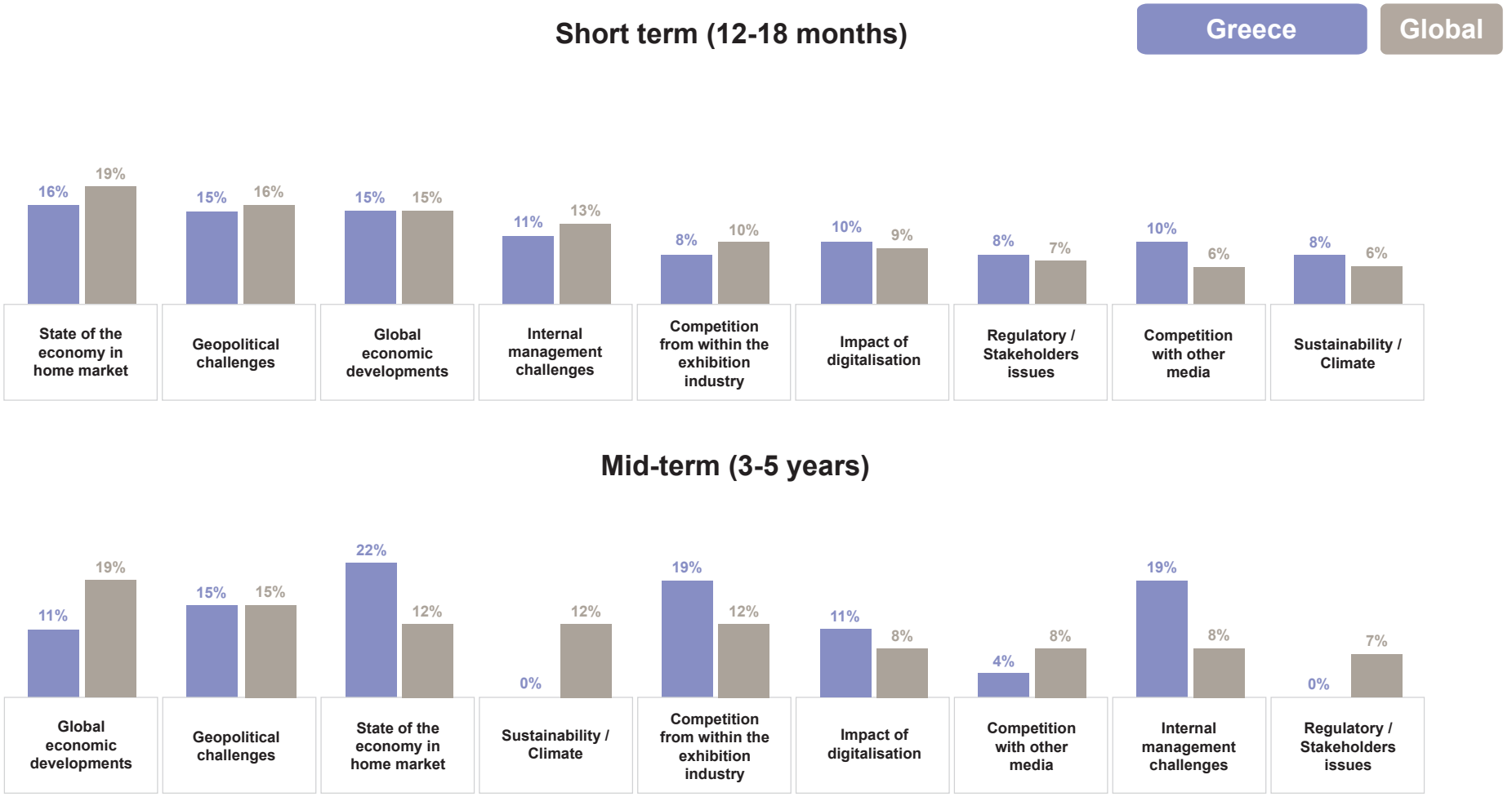





(15 answers in total)

# Detailed results for Greece

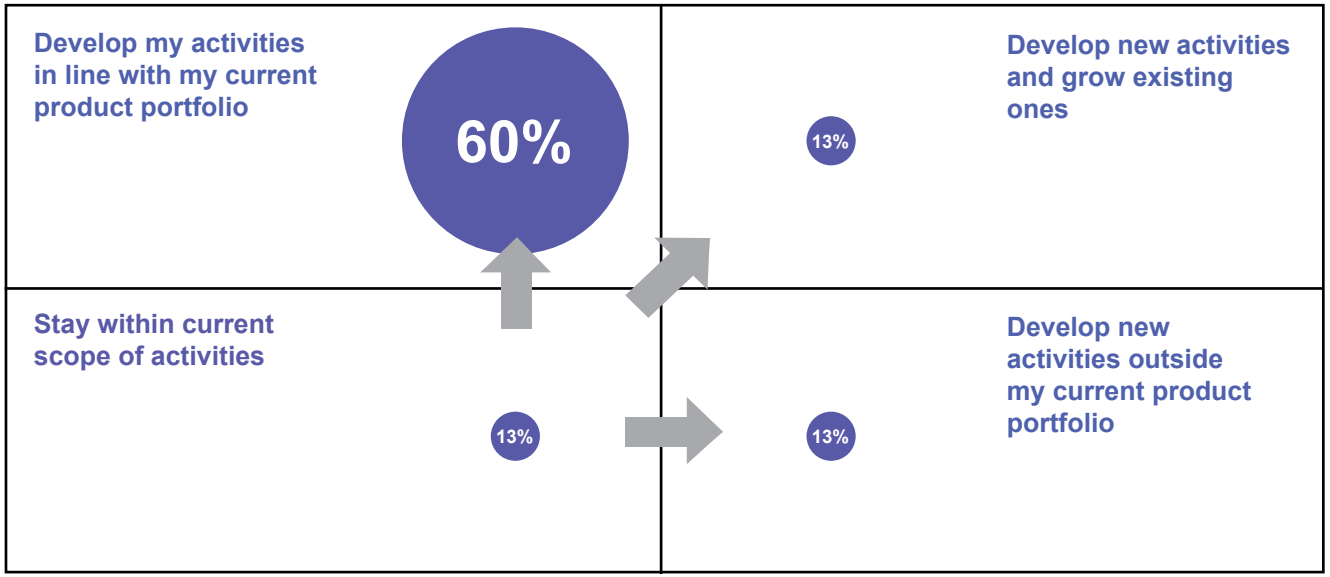
## Most important business issues in the exhibition industry right now



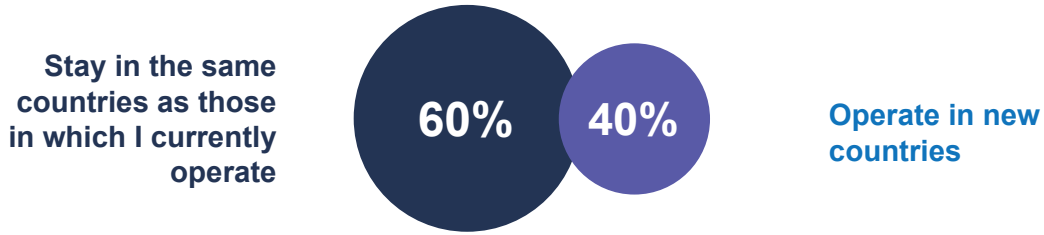
# Detailed results for Greece

## Current Strategic Priorities Related To:

### Range of Activities



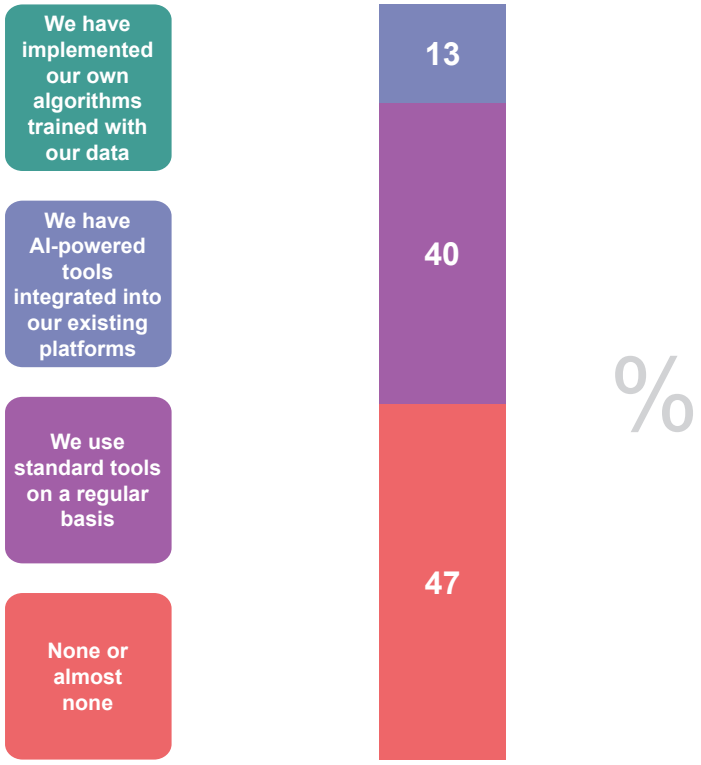

### Geographic Exposure



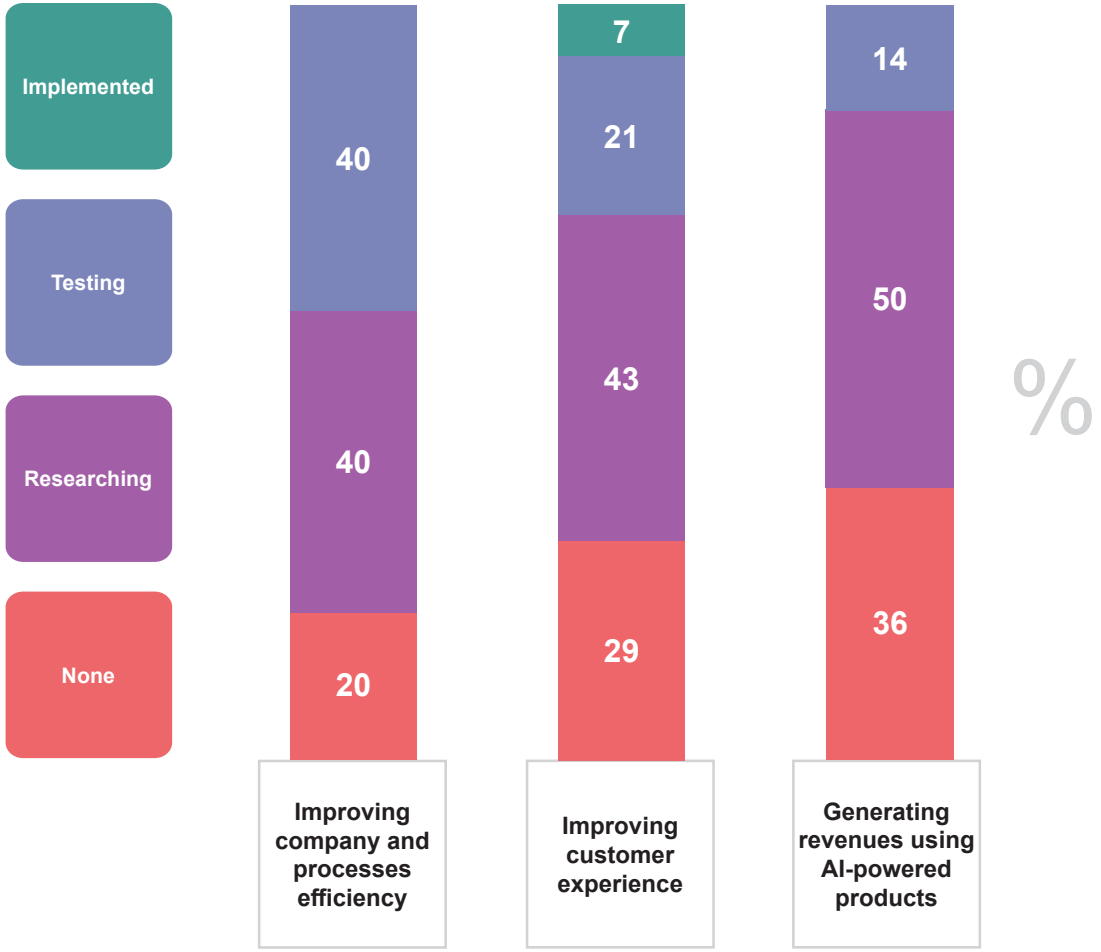
# Detailed results for Greece

## Generative AI Applications

### Level of Implementation




### Level of Maturity

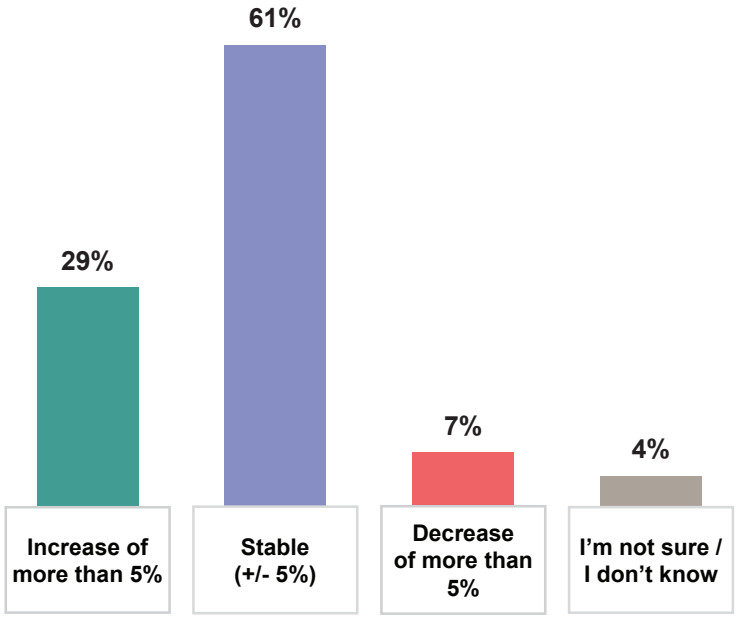




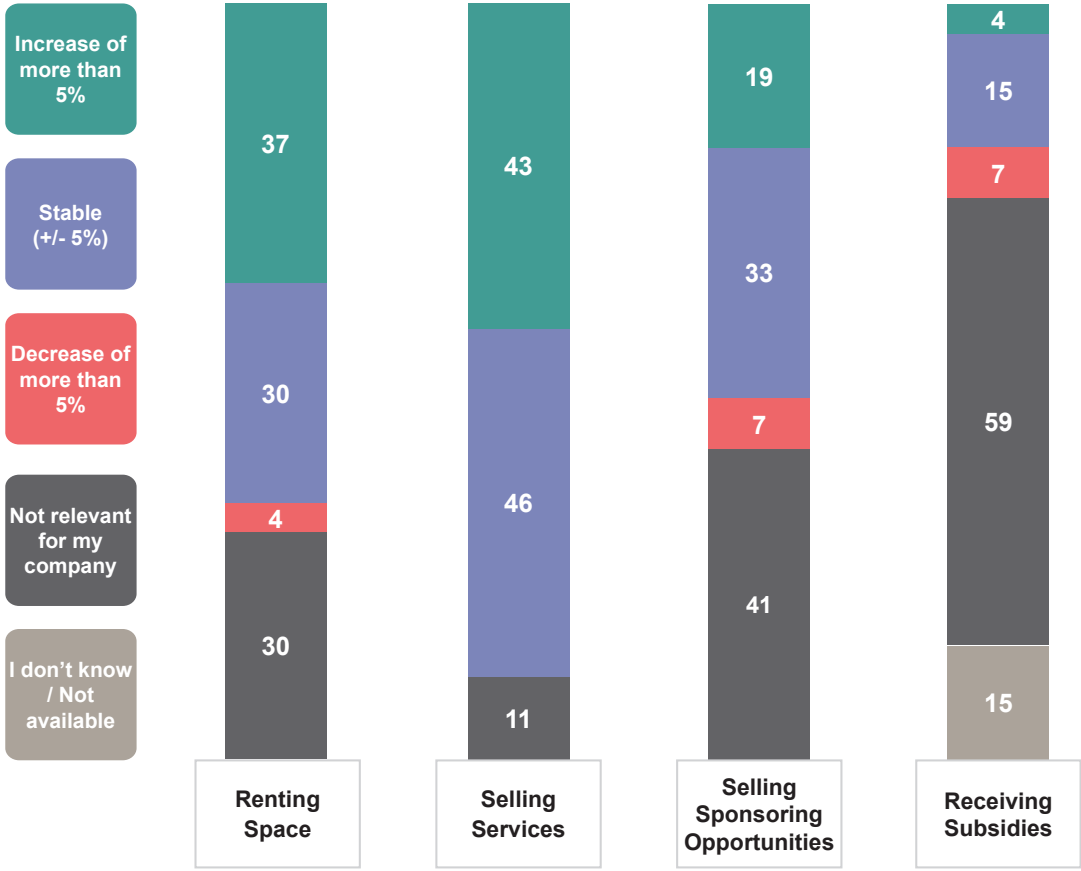

(15 answers in total)

# Detailed results for Italy

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

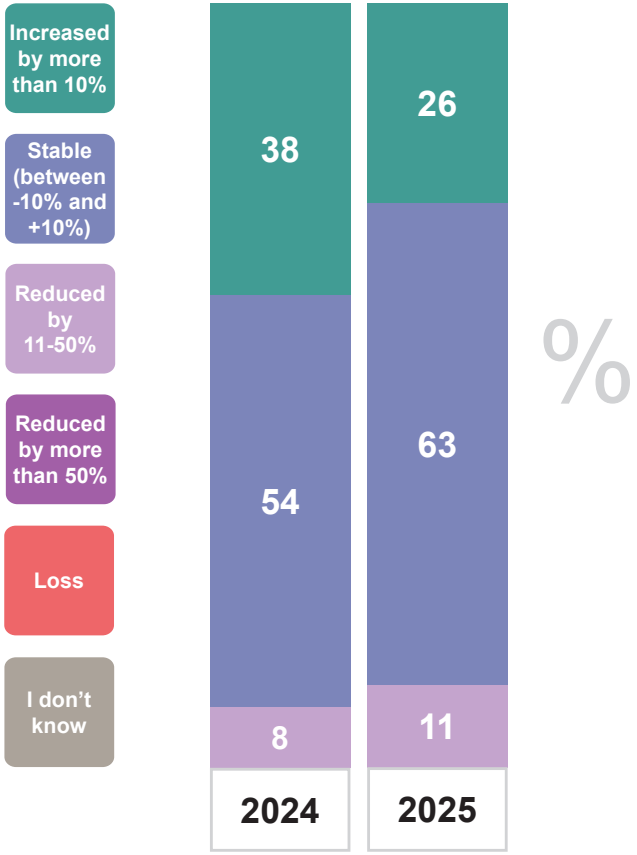





(28 answers in total)

# Detailed results for Italy

## Operating Profits compared to the previous year

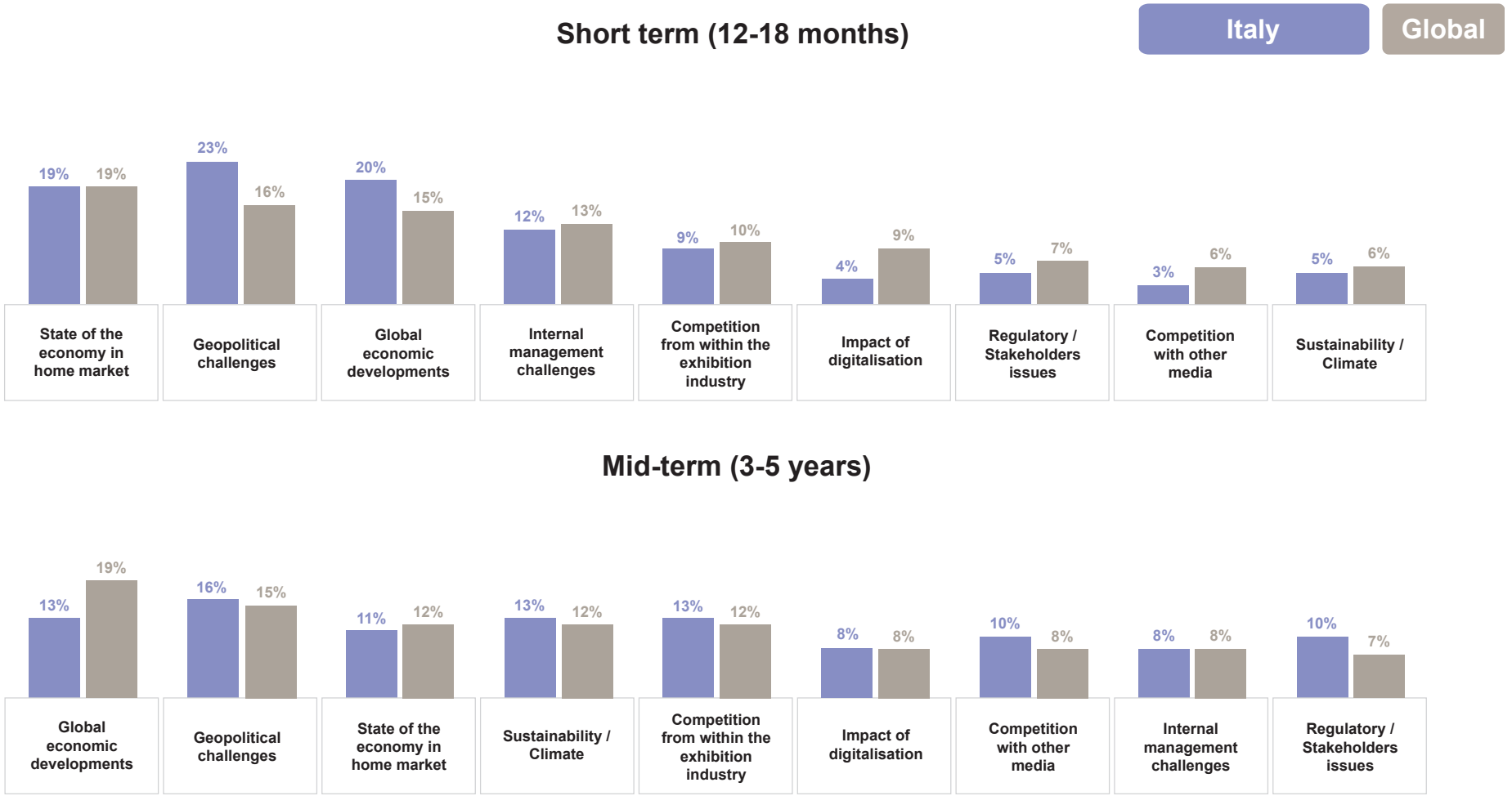



## How do you plan to develop your workforce in the coming 6 months

(28 answers in total)

# Detailed results for Italy

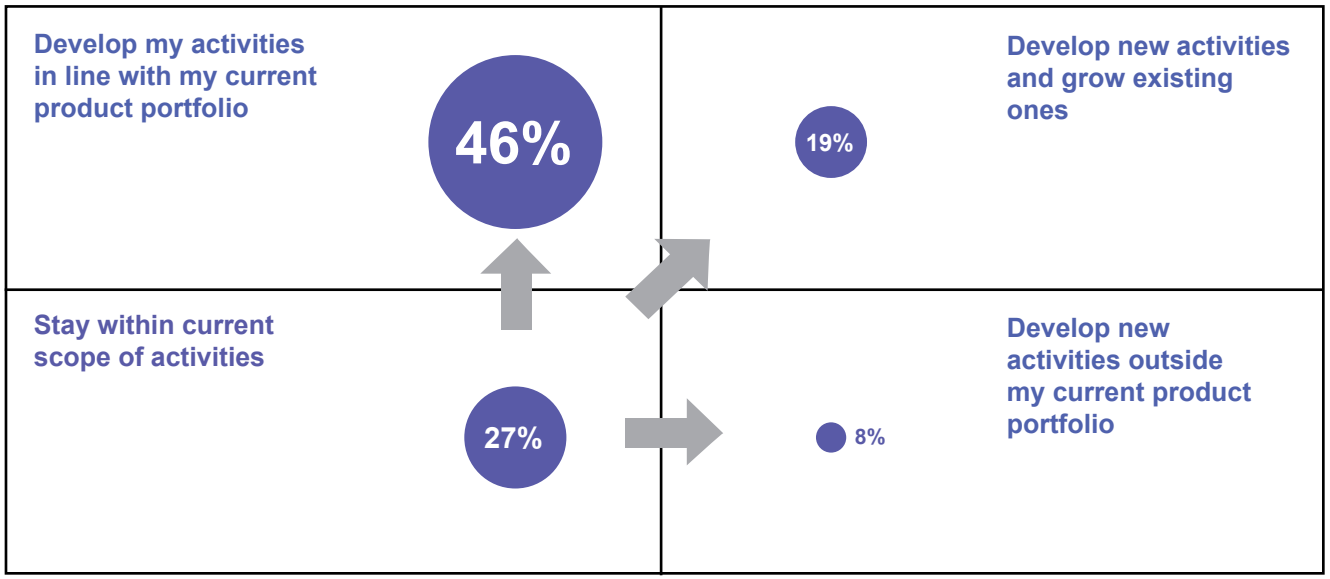
## Most important business issues in the exhibition industry right now



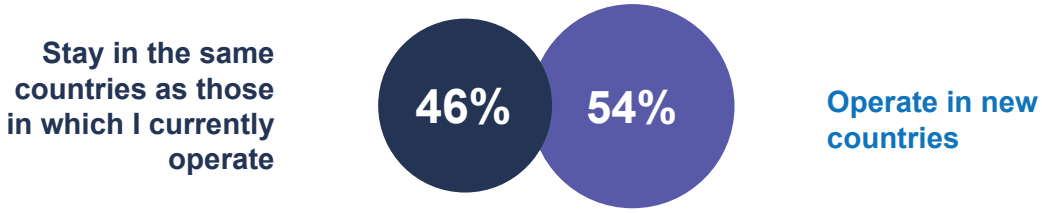
# Detailed results for Italy

## Current Strategic Priorities Related To:

### Range of Activities



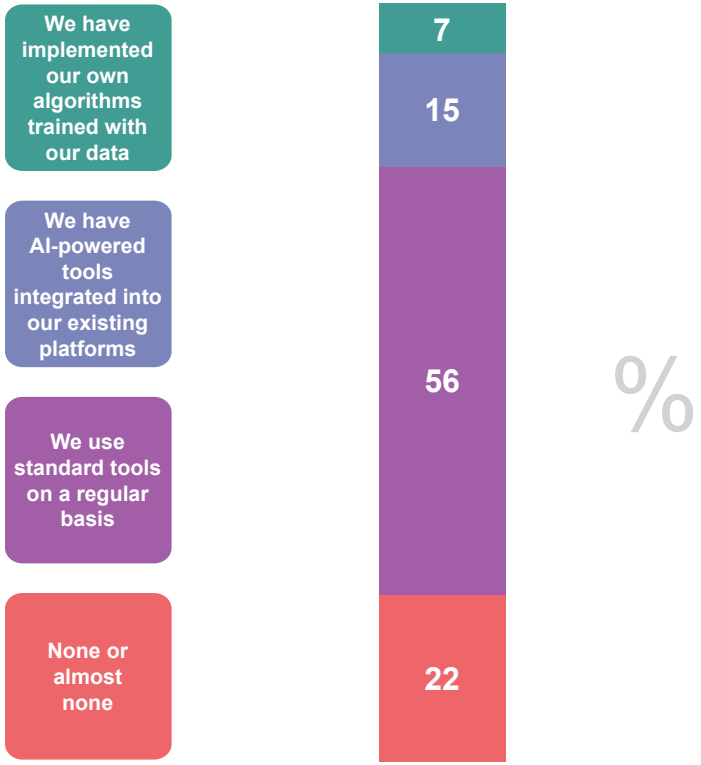

### Geographic Exposure



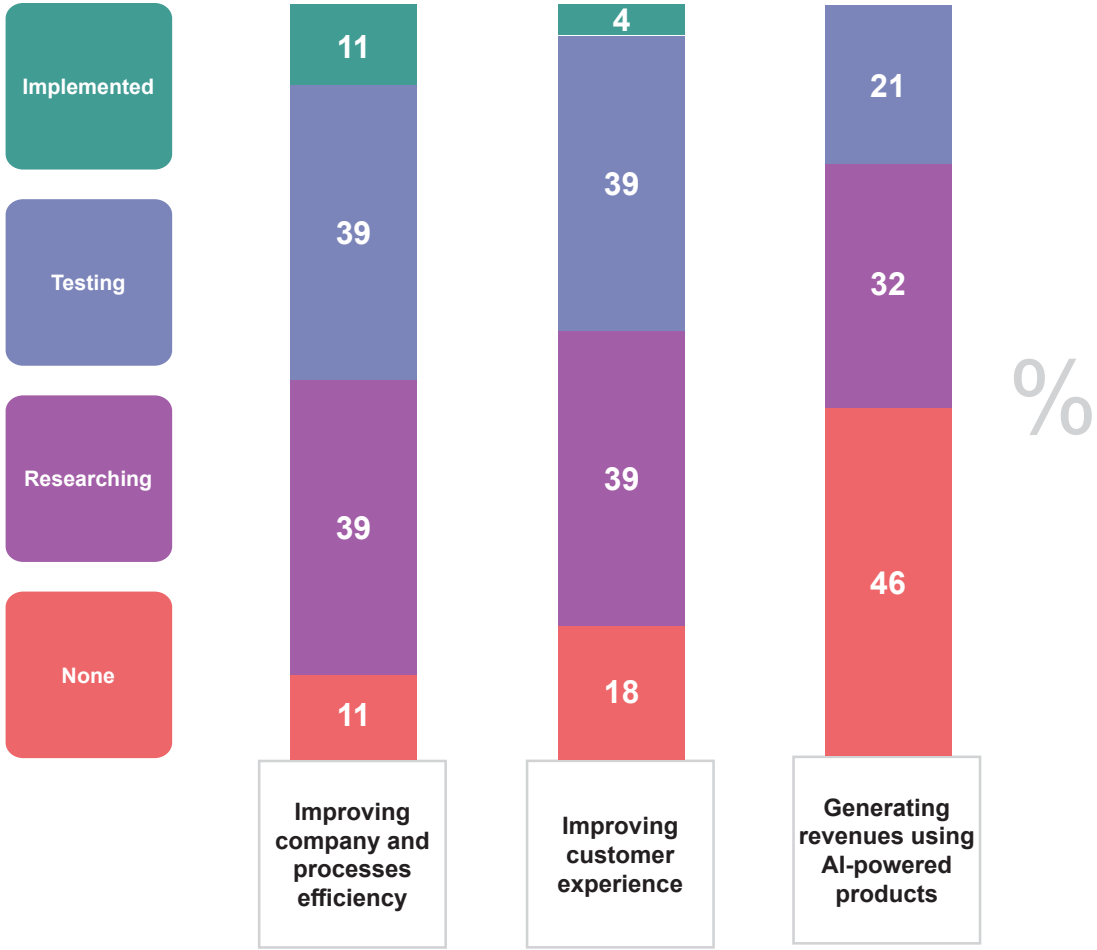
# Detailed results for Italy

## Generative AI Applications

### Level of Implementation




### Level of Maturity

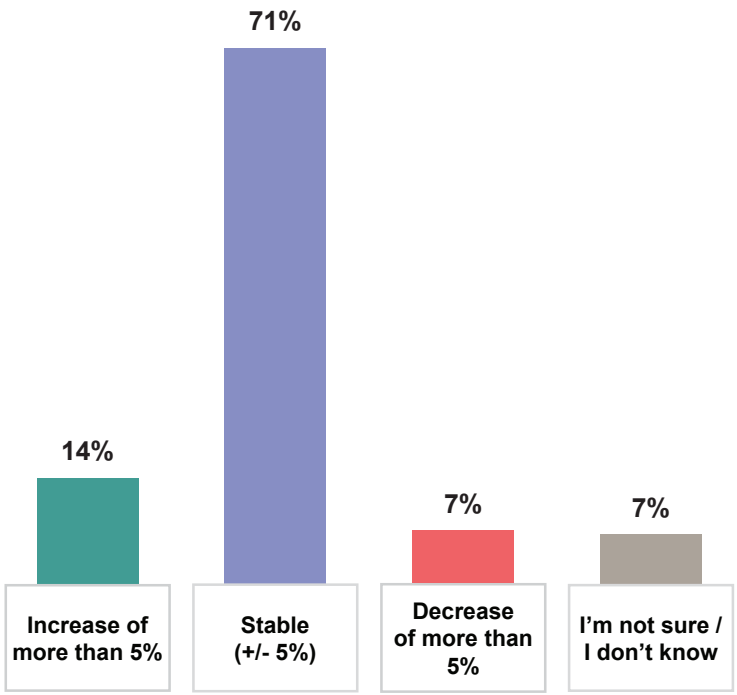




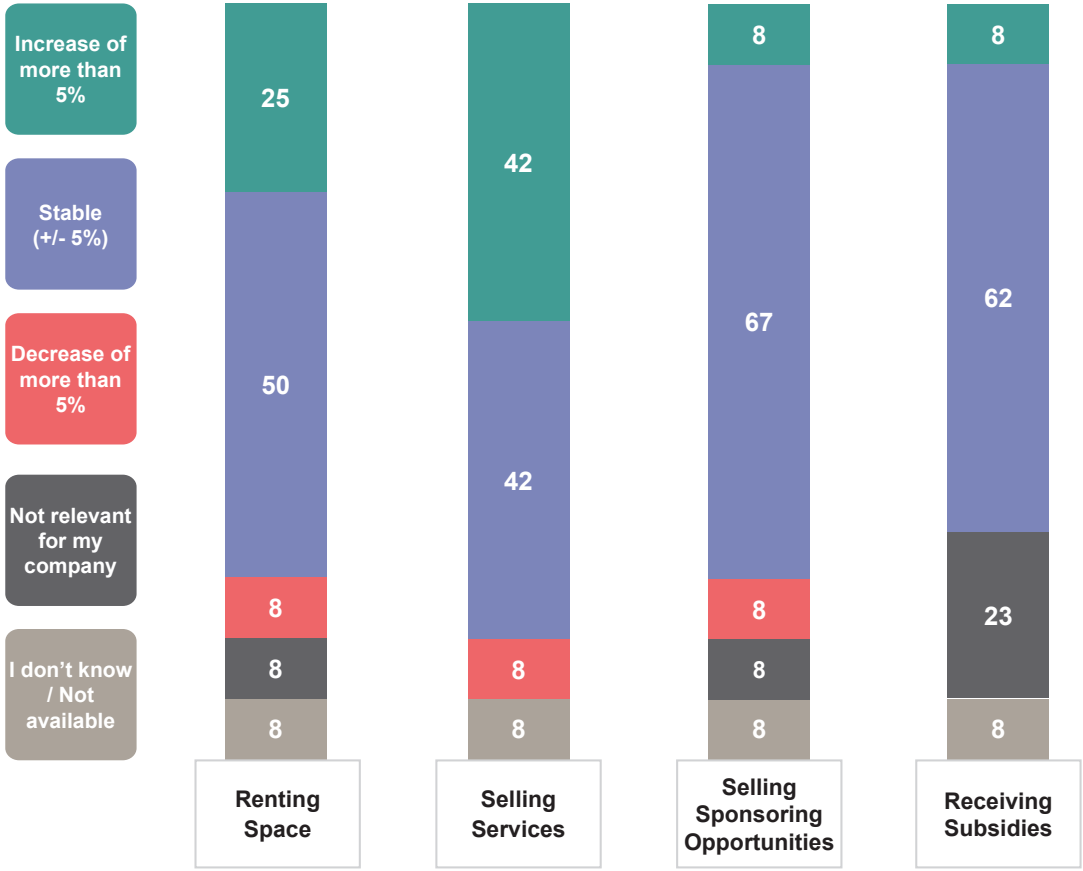

(28 answers in total)

# Detailed results for Spain

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

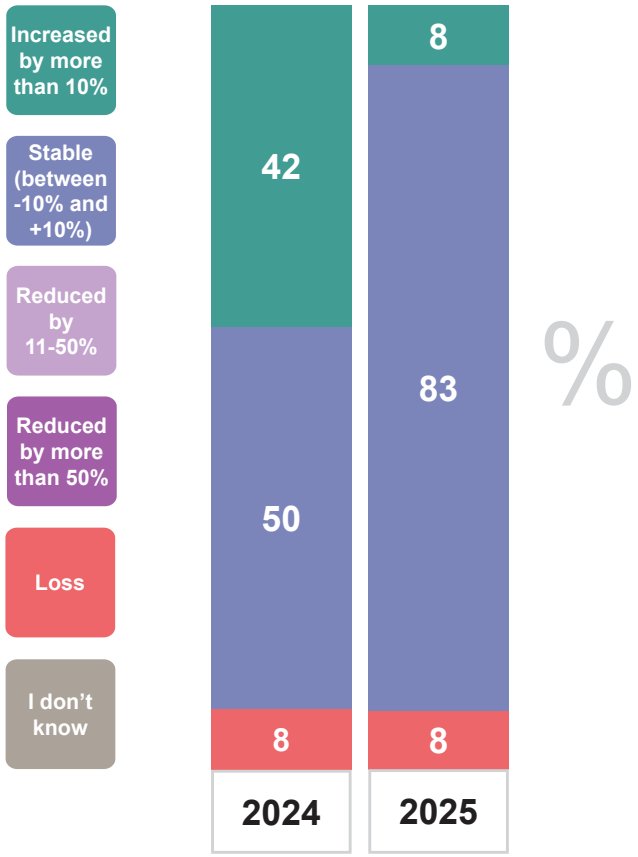




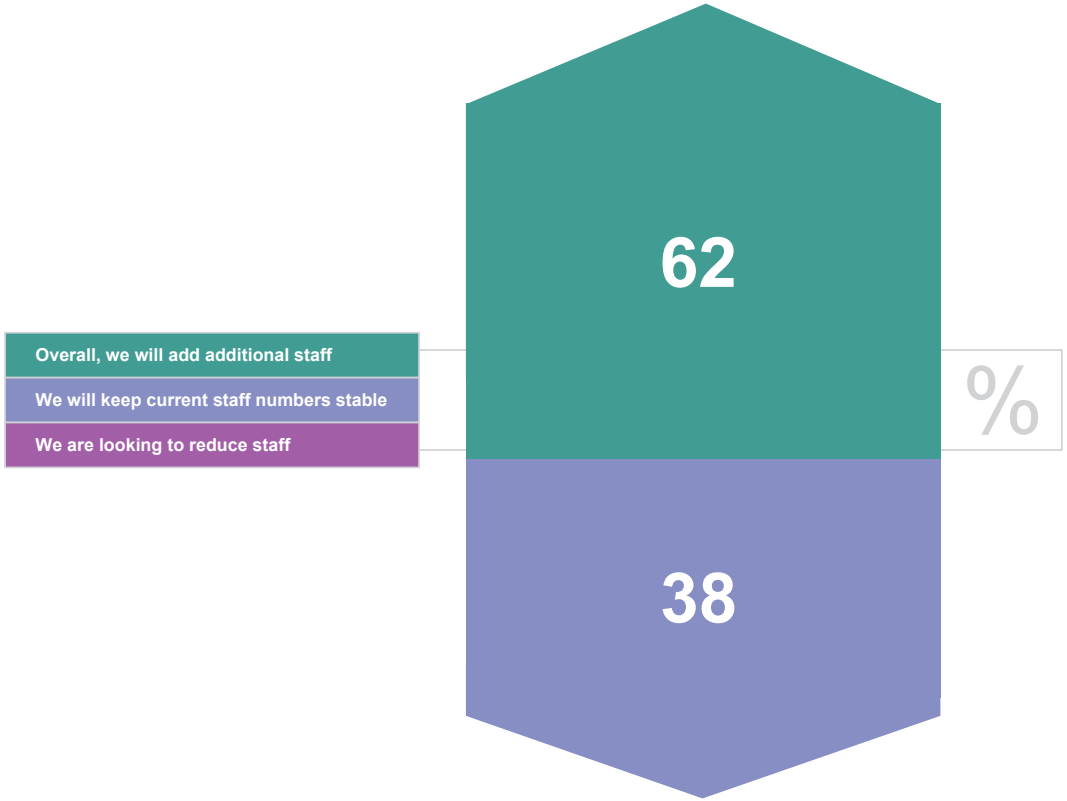

(14 answers in total)

# Detailed results for Spain

## Operating Profits compared to the previous year




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

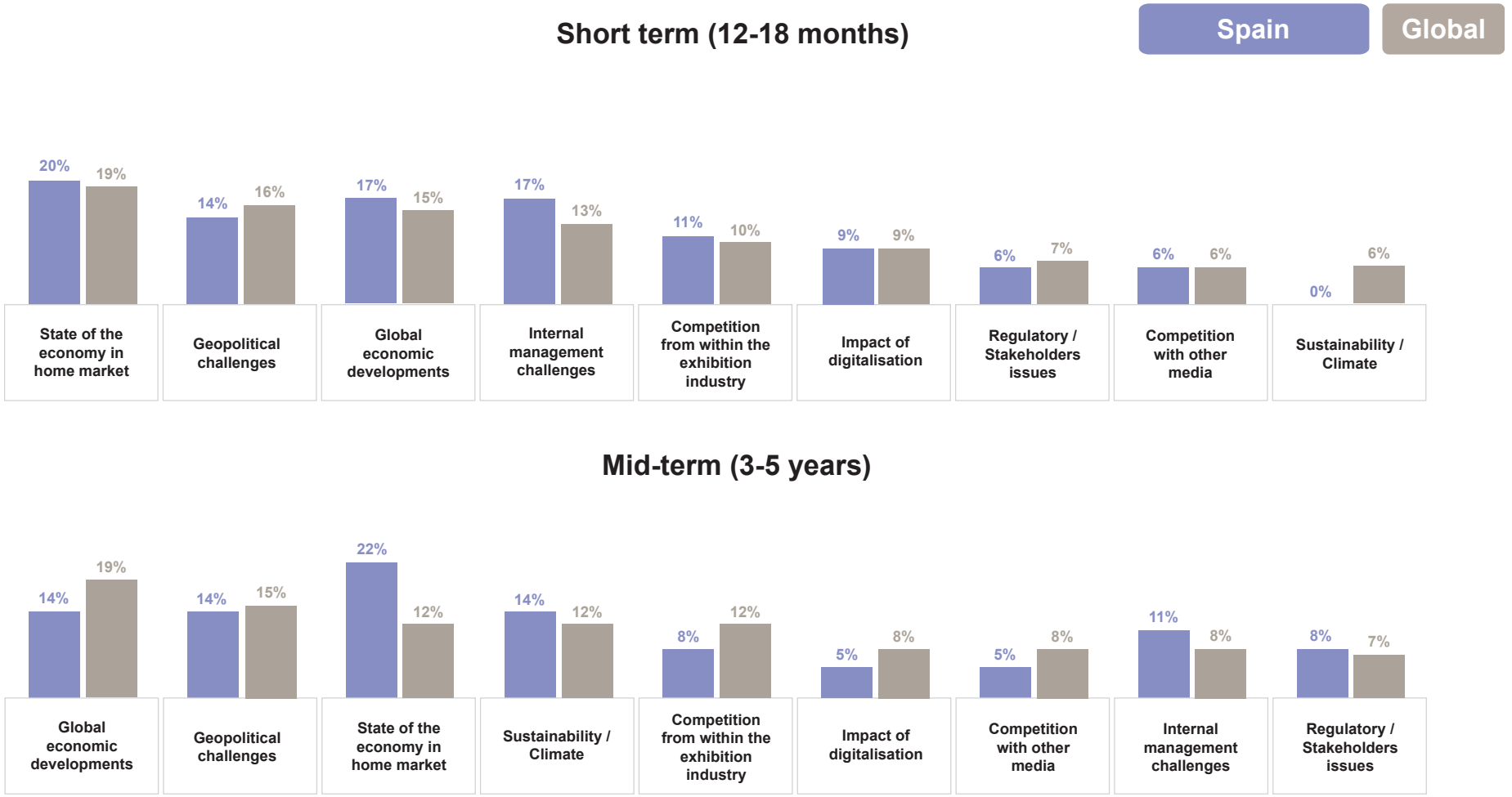





(14 answers in total)

# Detailed results for Spain

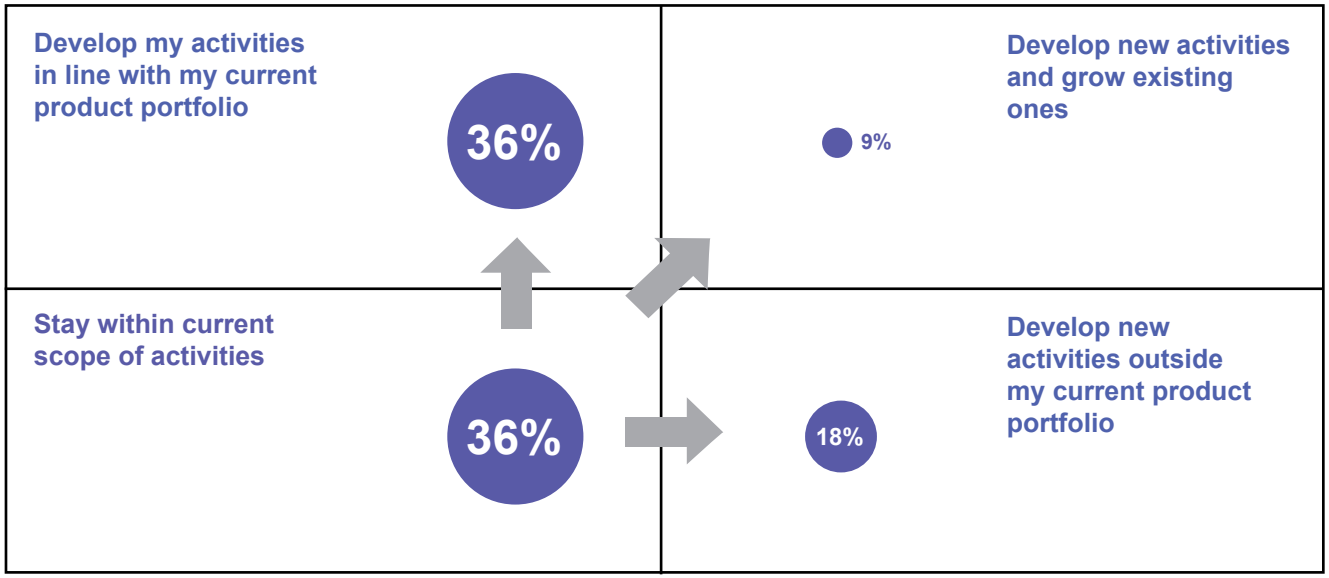
## Most important business issues in the exhibition industry right now



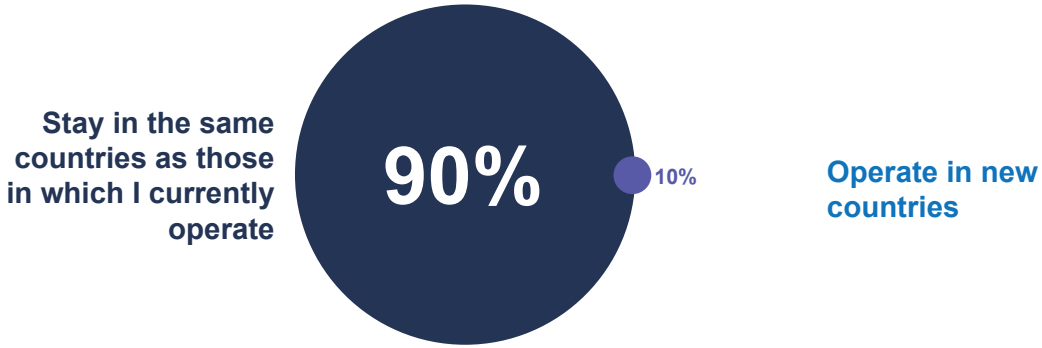
# Detailed results for Spain

## Current Strategic Priorities Related To:

### Range of Activities



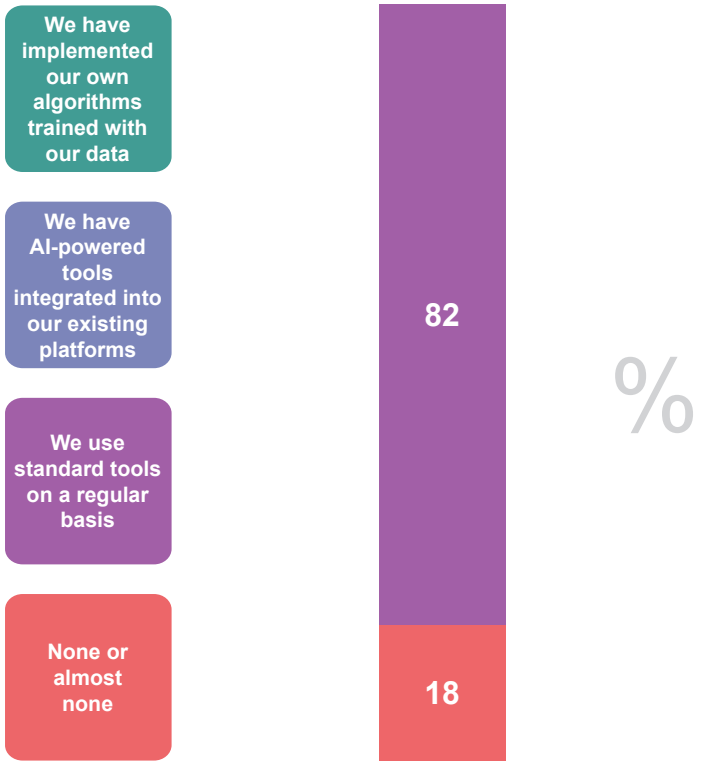

### Geographic Exposure



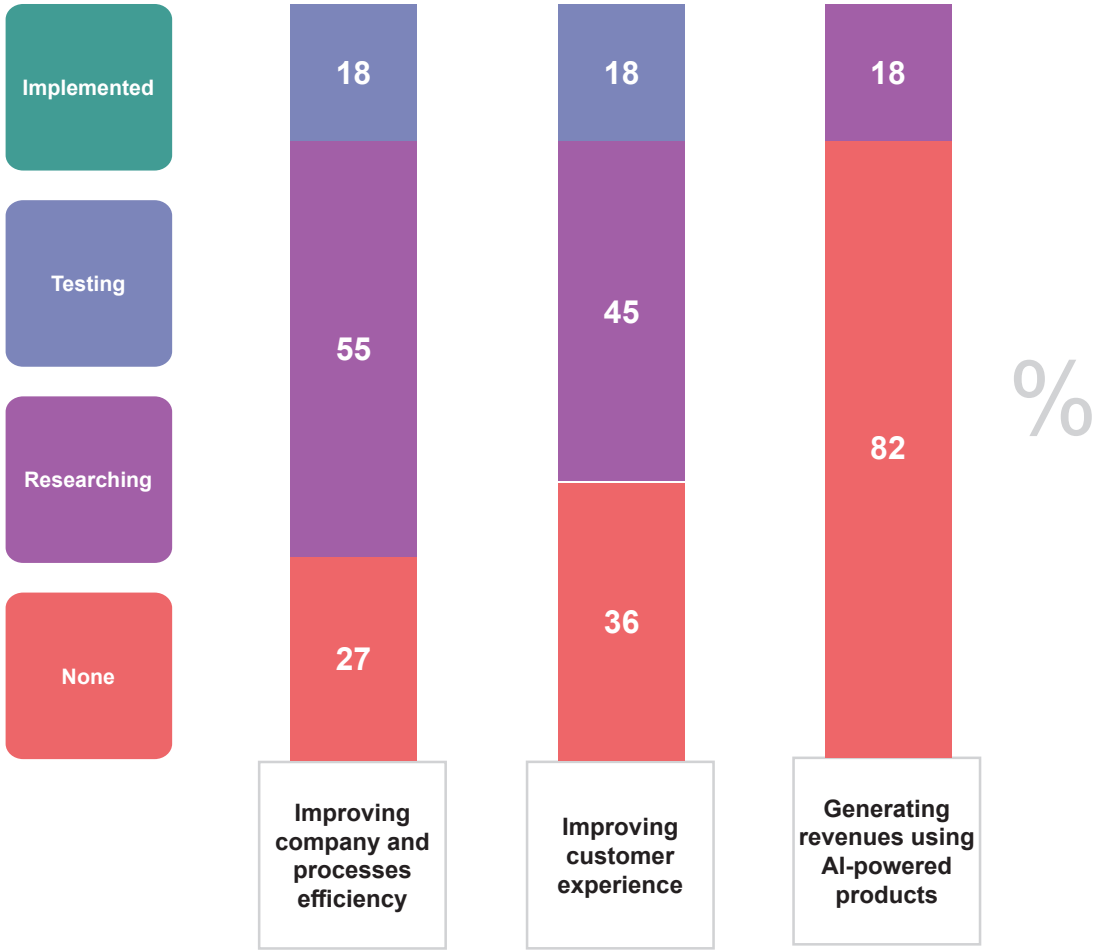
# Detailed results for Spain

## Generative AI Applications

### Level of Implementation

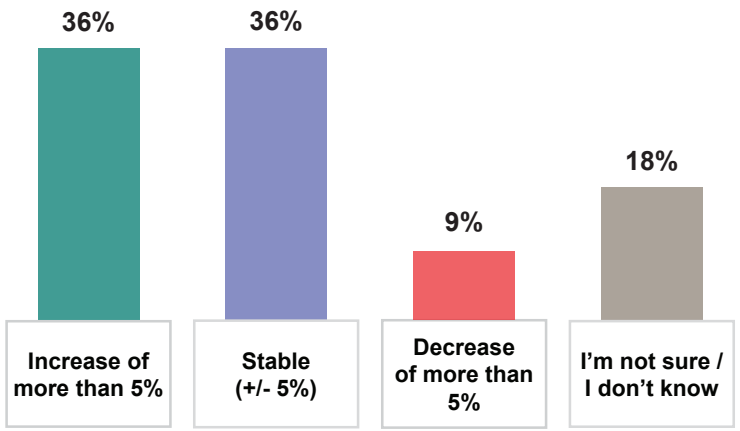



### Level of Maturity

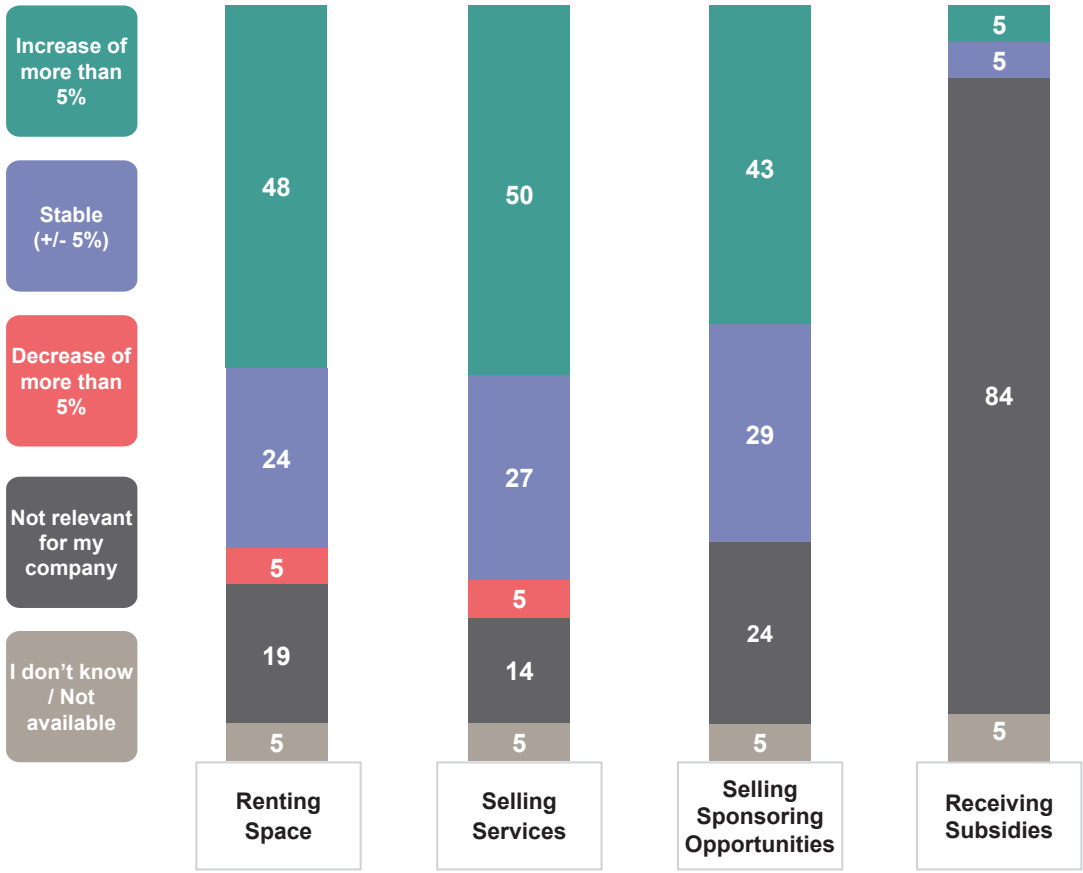


# Detailed results for UK

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024

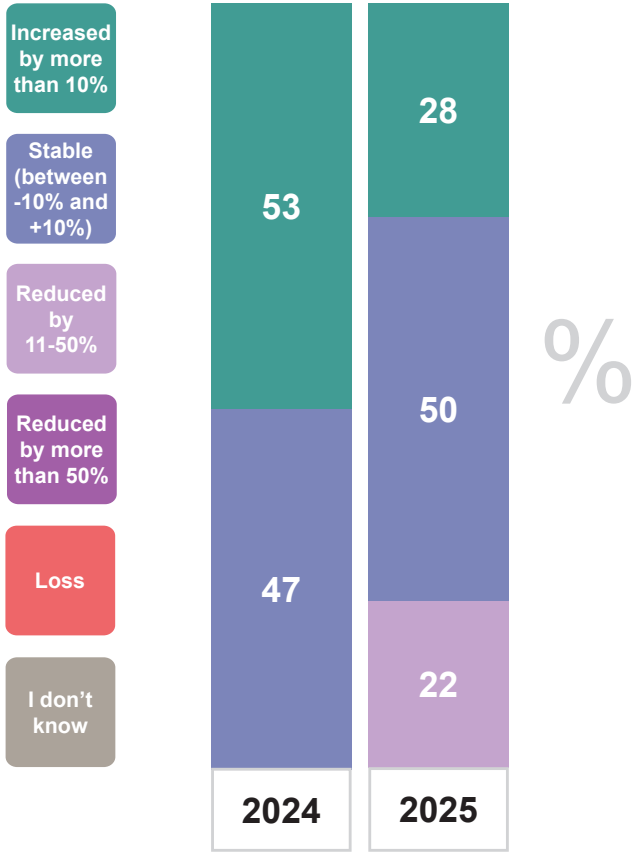



## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

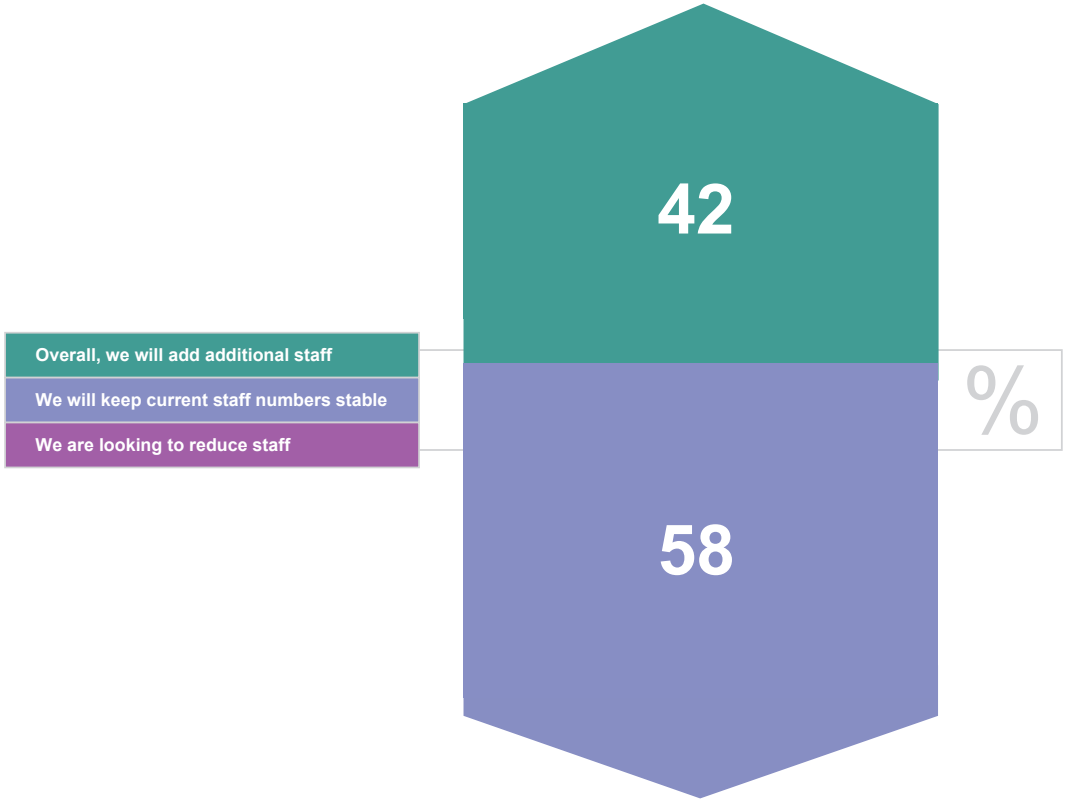


# Detailed results for UK

## Operating Profits compared to the previous year




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

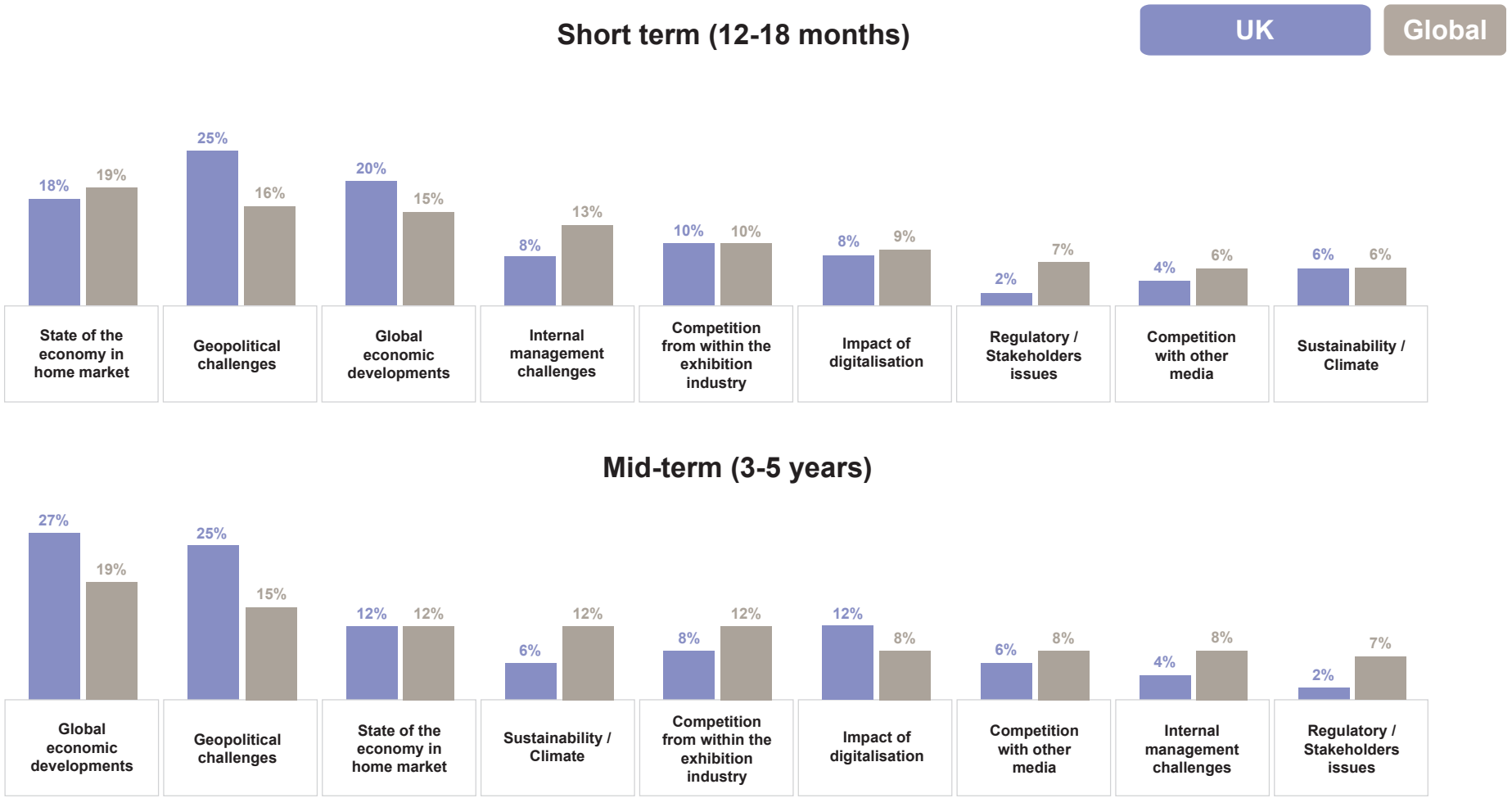





(22 answers in total)

# Detailed results for UK

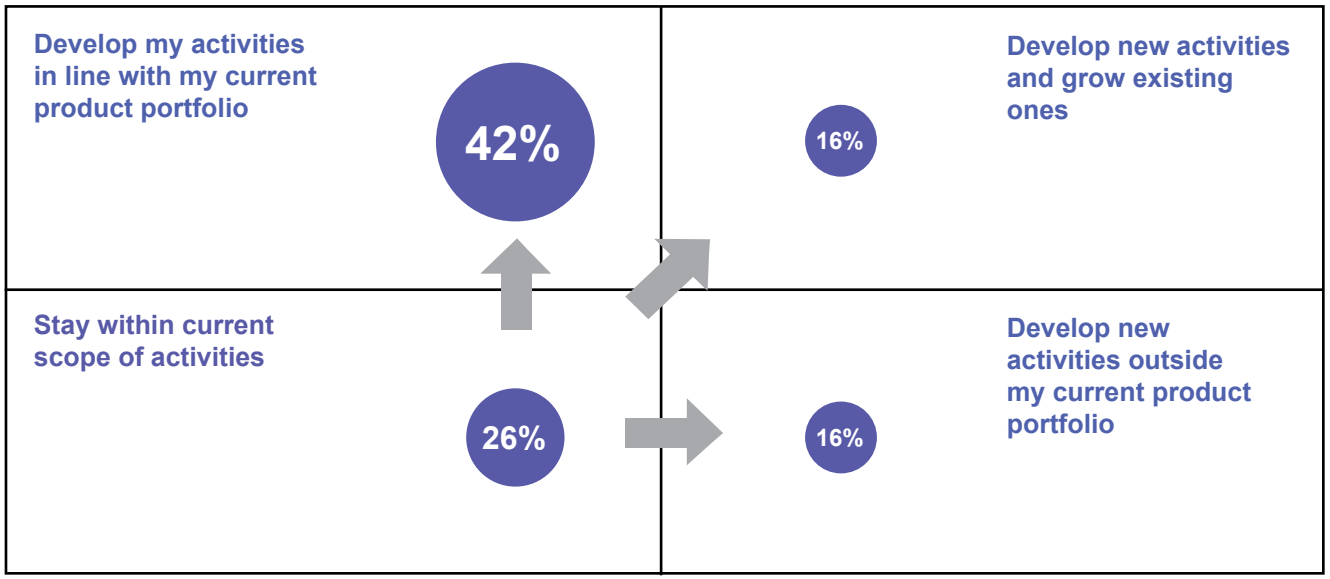
## Most important business issues in the exhibition industry right now



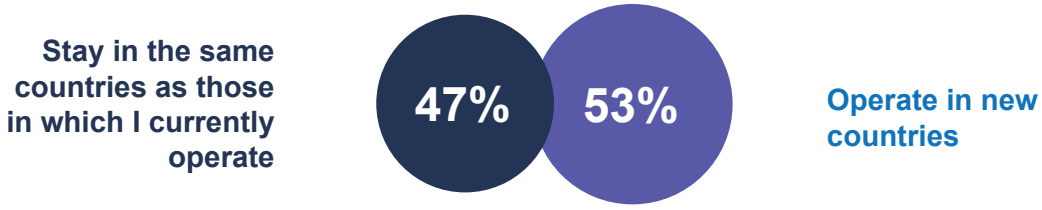
# Detailed results for UK

## Current Strategic Priorities Related To:

### Range of Activities



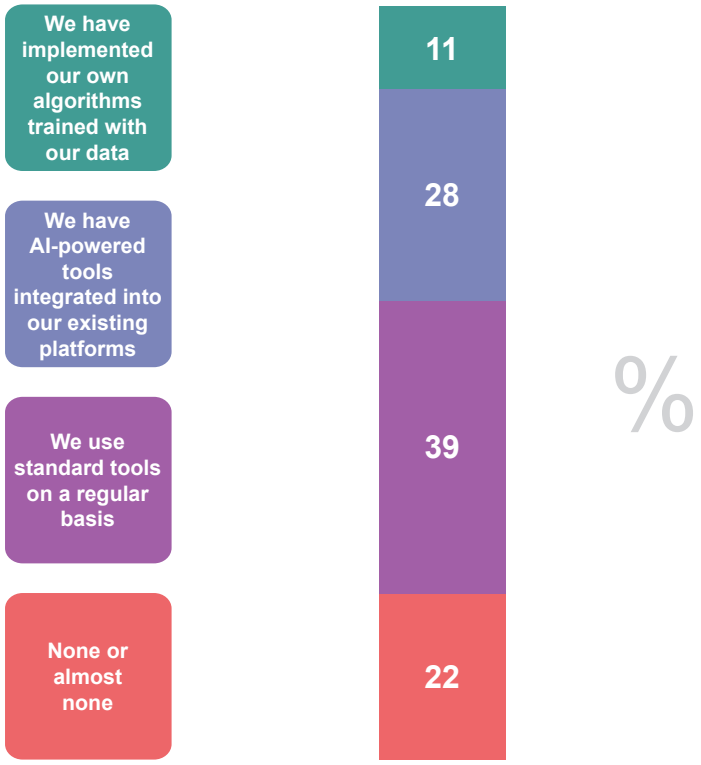

### Geographic Exposure



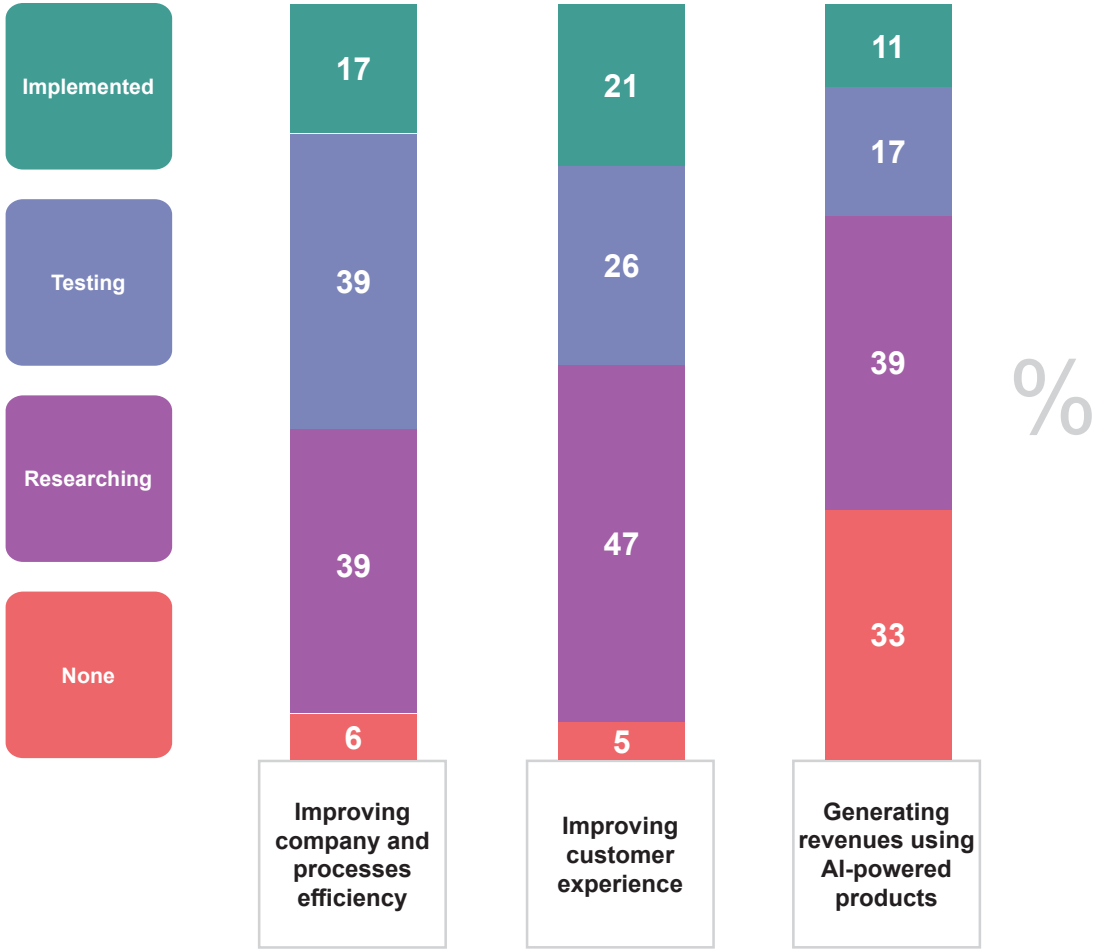
# Detailed results for UK

## Generative AI Applications

### Level of Implementation




### Level of Maturity

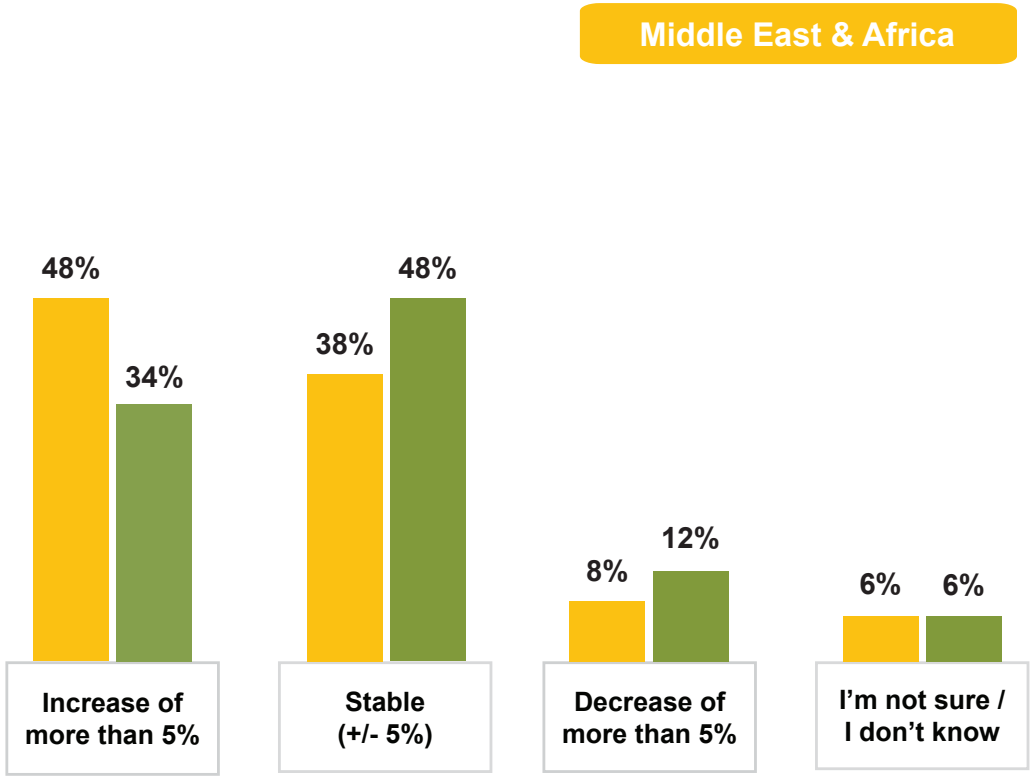


# Middle East & Africa

# Middle East & Africa

The Global Association of the Exhibition Industry

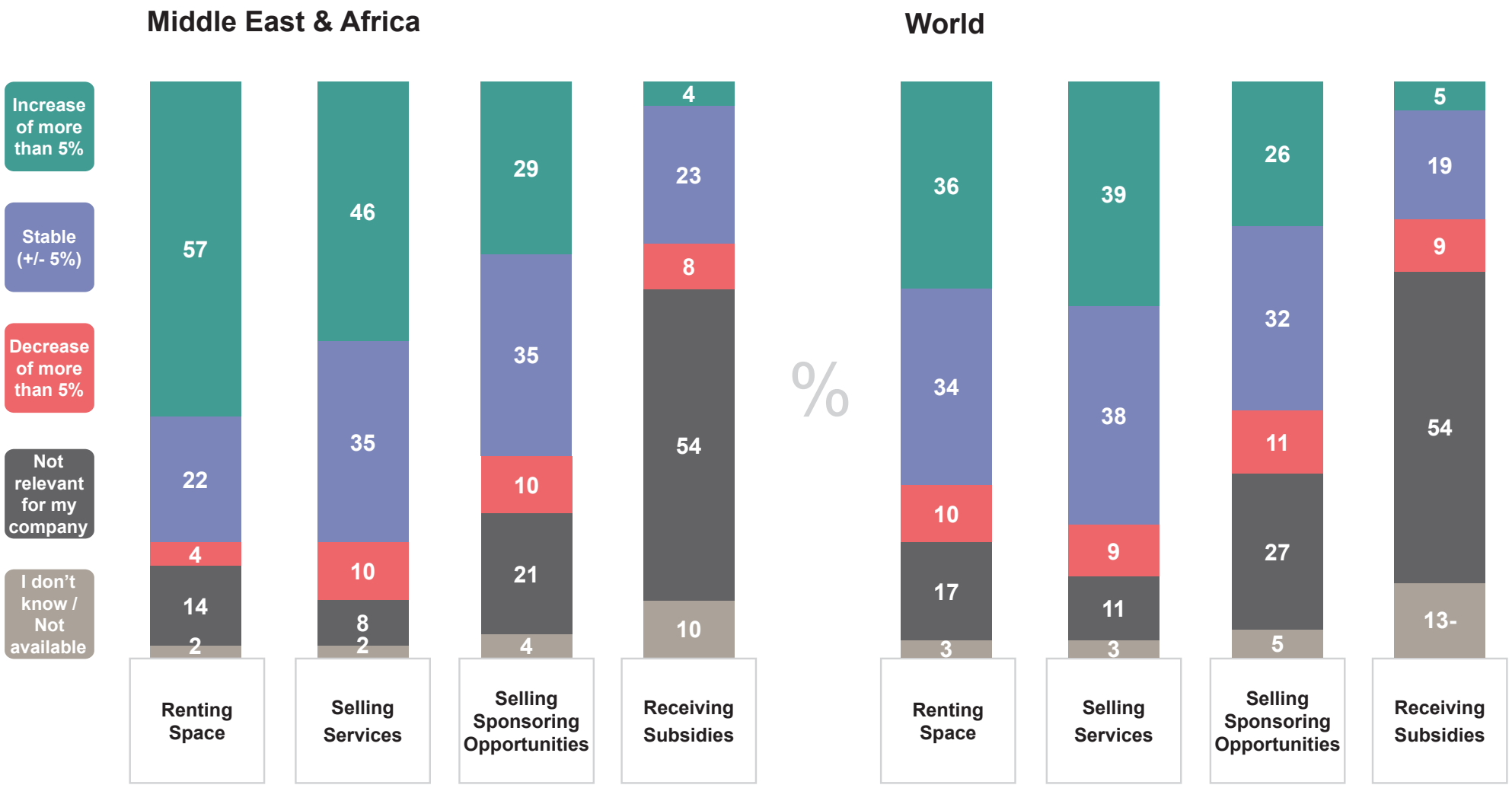
**Aggregated Country Forecast**
**2025 compared to 2024**



# Revenues
# Middle East & Africa

ufi The Global Association of the Exhibition Industry

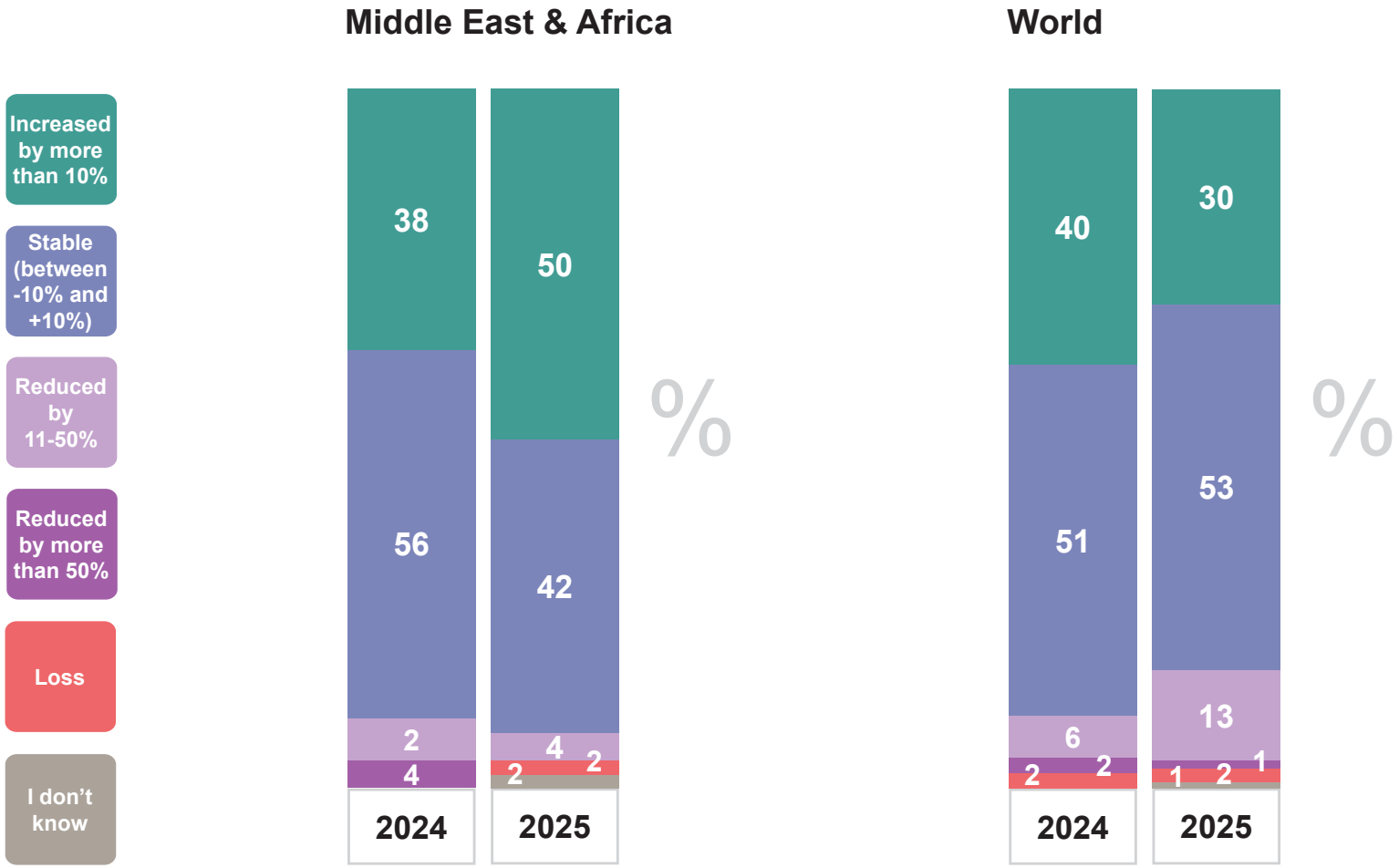
## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



# Operating Profit
# Middle East & Africa

ufi The Global Association of the Exhibition Industry

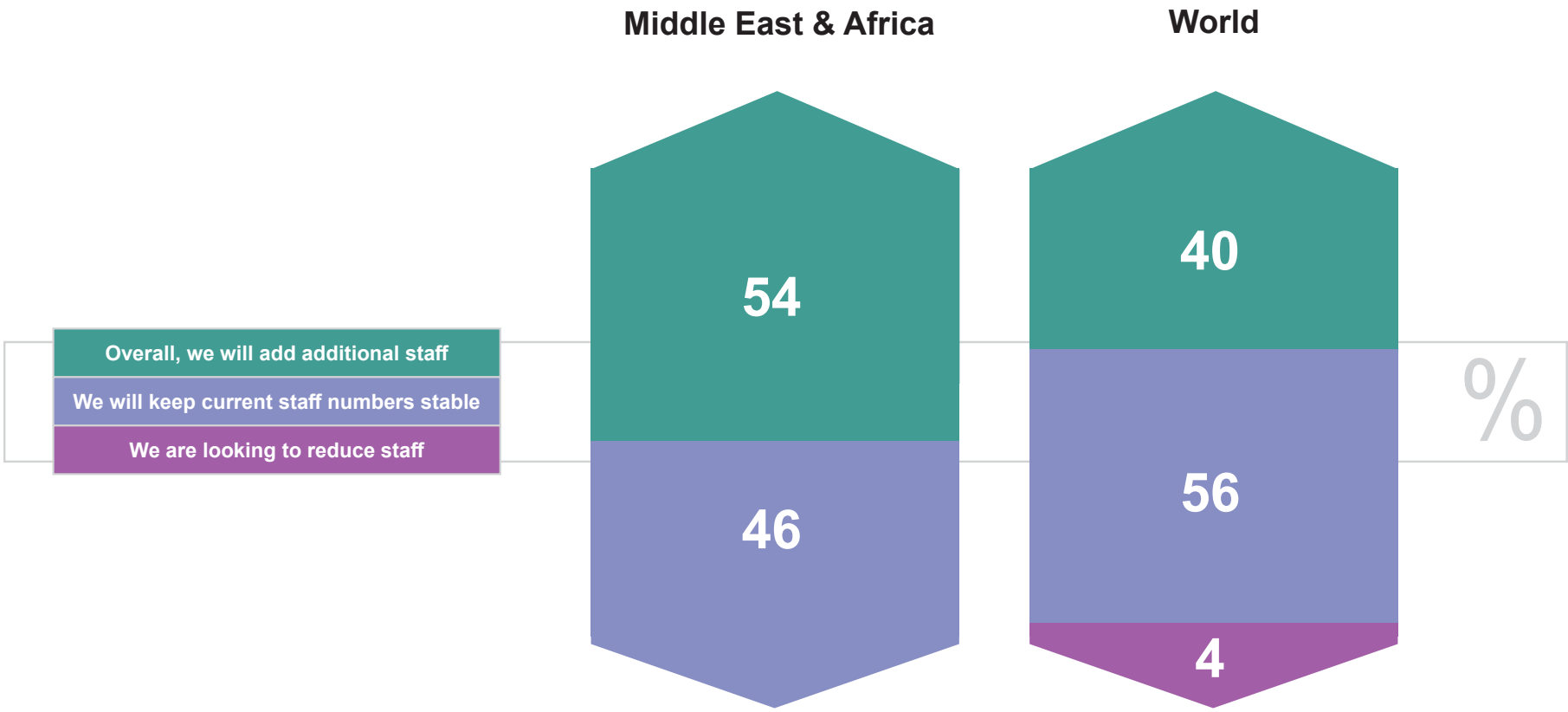
## Operating Profits
## compared to the previous year



# Workforce
# Middle East & Africa

The Global Association of the Exhibition Industry

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

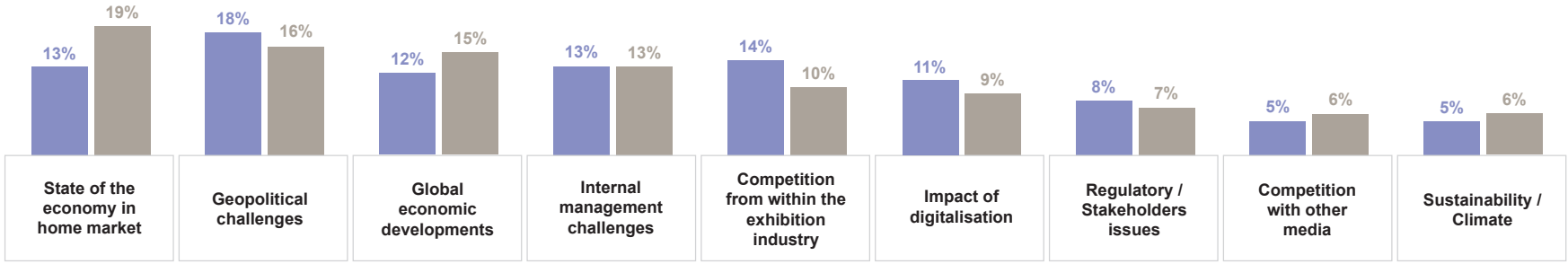


# Most Important Business Issues
# Middle East & Africa

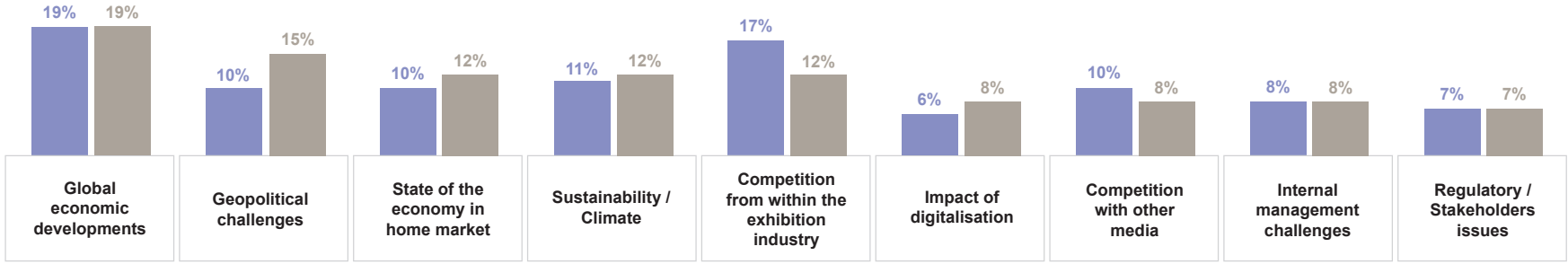
The Global Association of the Exhibition Industry

## Short term (12-18 months)

Middle East & Africa | Global




## Mid-term (3-5 years)

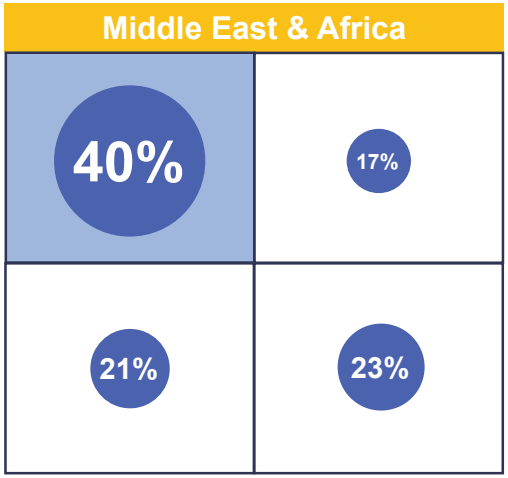


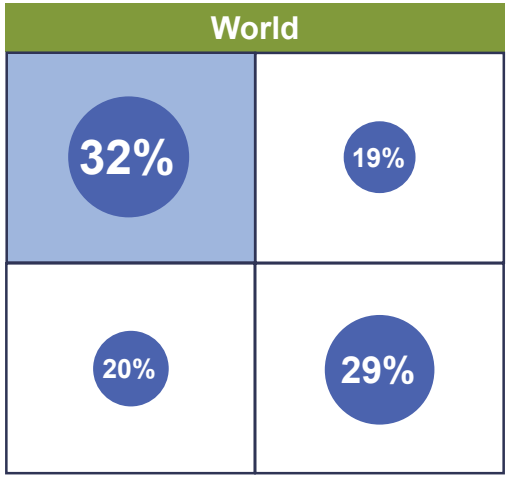
# Current Strategic Priorities
# Middle East & Africa

ufi The Global Association of the Exhibition Industry

## Range of Activities

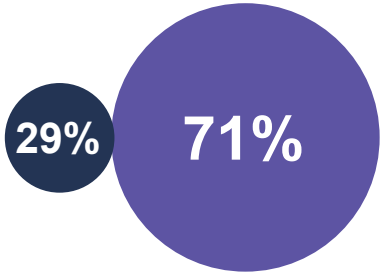
| Key | |
|---|---|
| Develop my activities in line with my current product portfolio | Develop new activities and grow existing ones |
| Stay within current scope of activities | Develop new activities outside my current product portfolio |




## Geographic Exposure

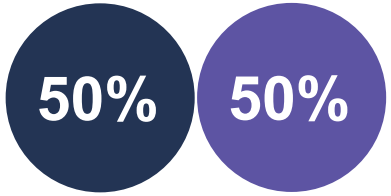
**Middle East & Africa**




Stay in the same countries as those in which I currently operate

Operate in new countries

**World**



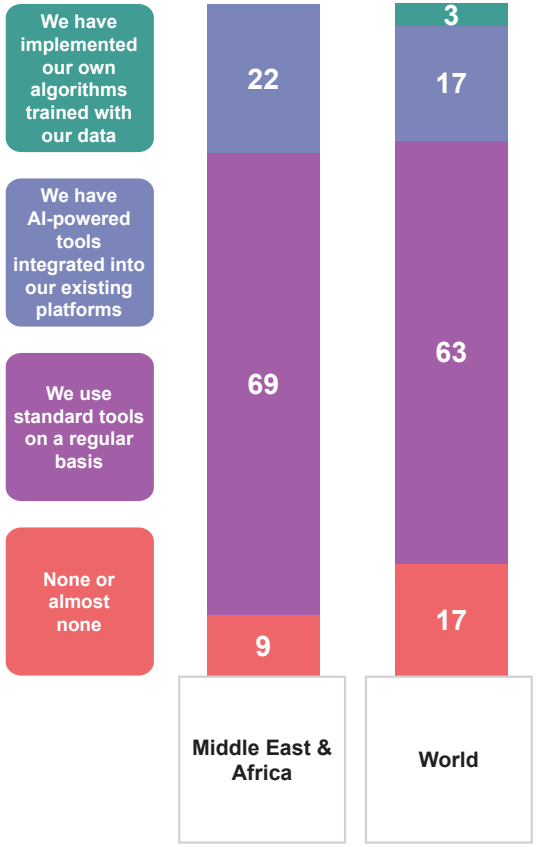

Stay in the same countries as those in which I currently operate

Operate in new countries

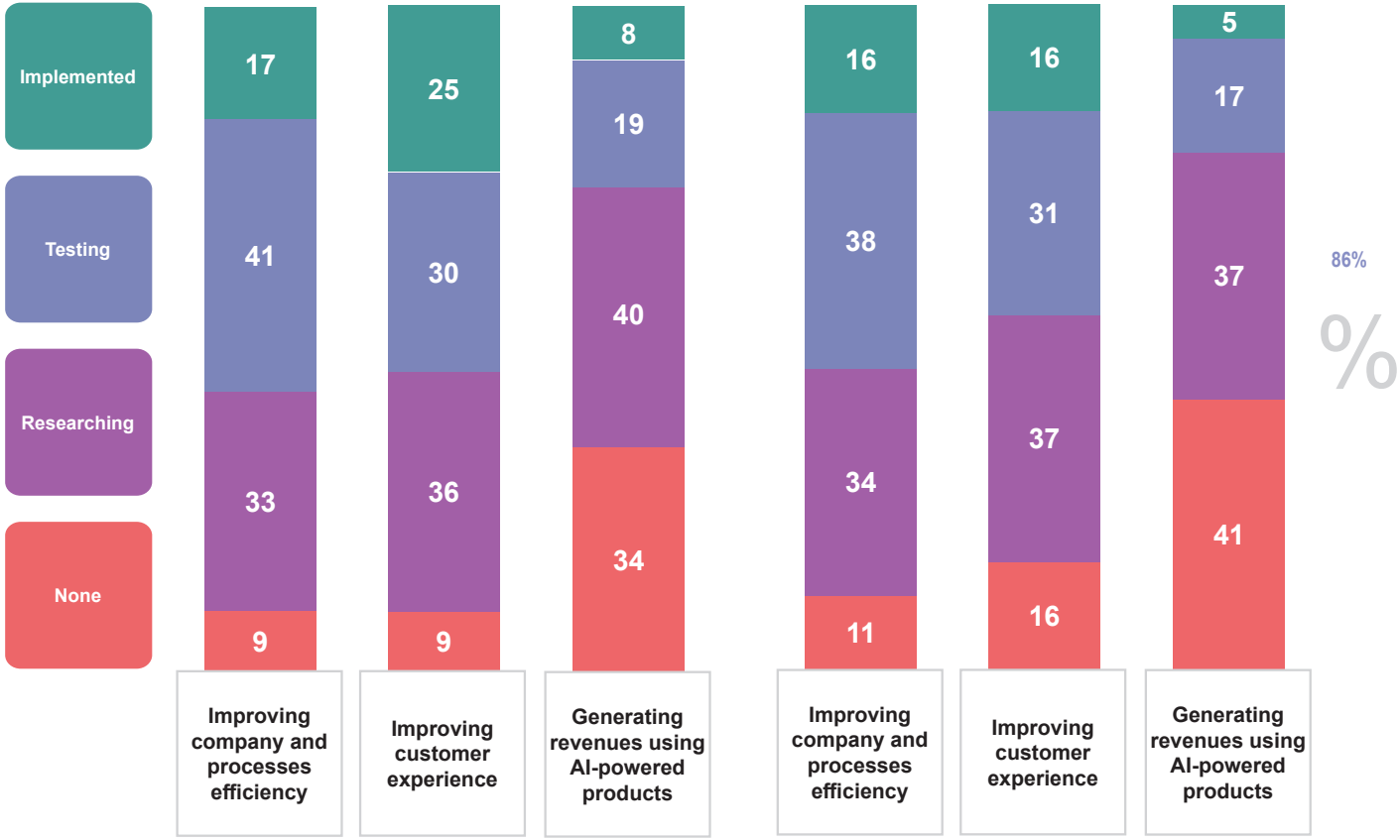
# Generative AI Applications
# Middle East & Africa

ufi The Global Association of the Exhibition Industry

## Level of Implementation

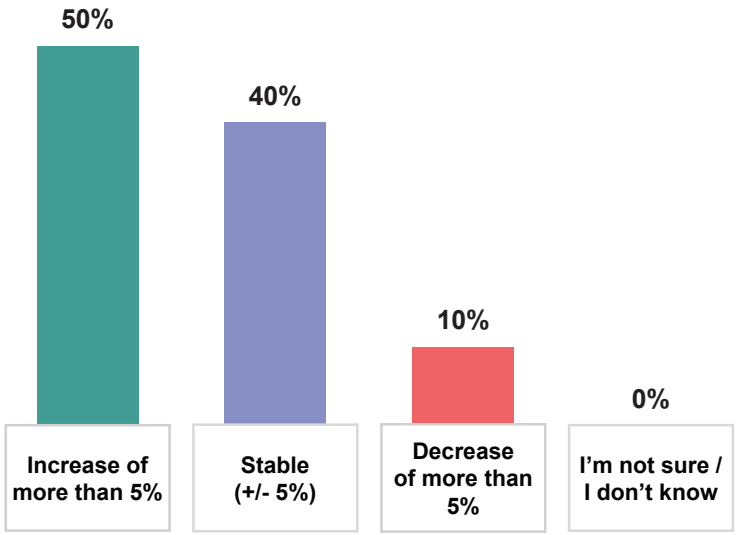



## Level of Maturity

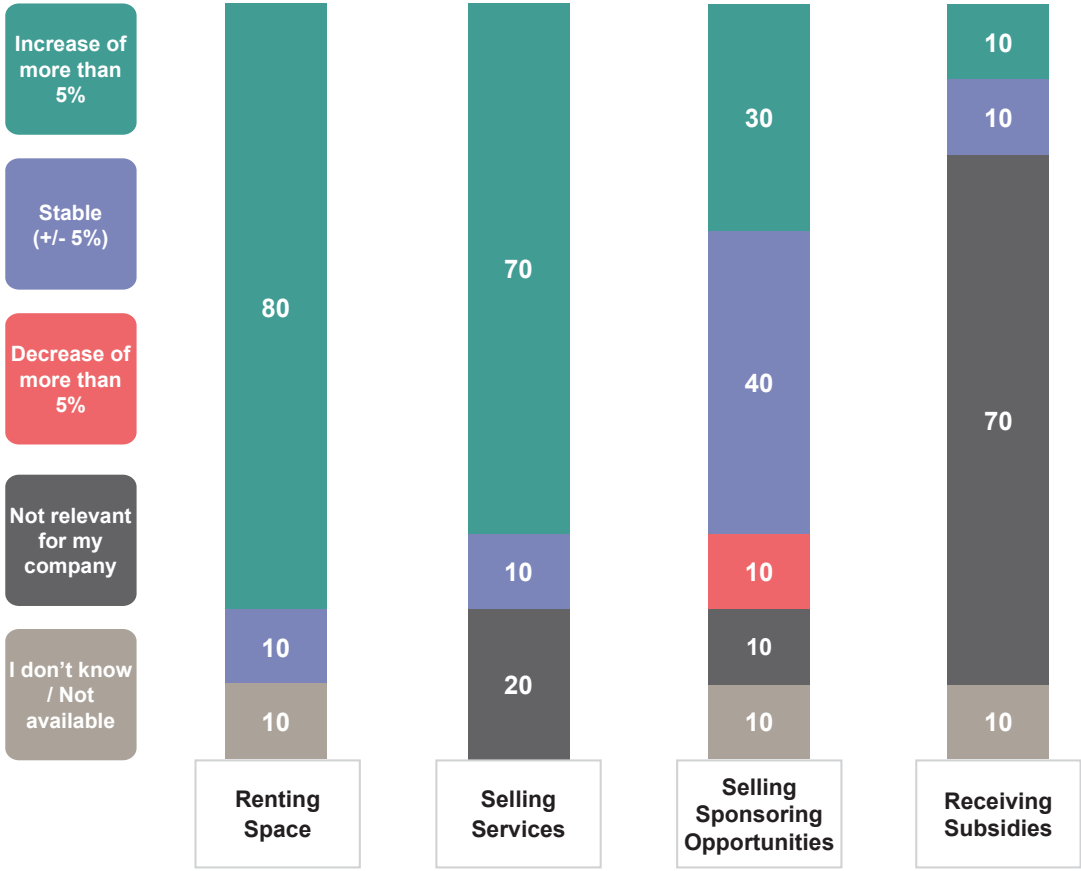


# Detailed results for Saudi Arabia

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

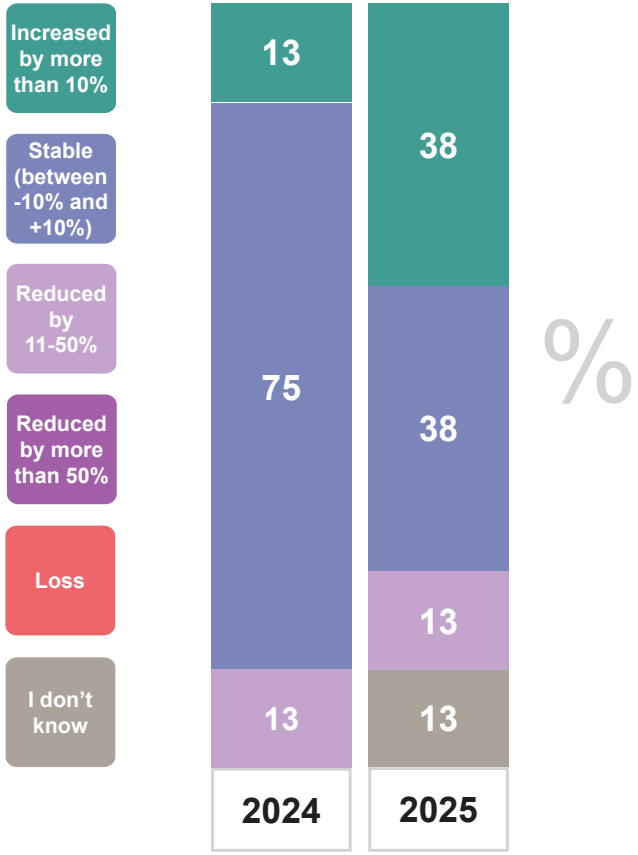




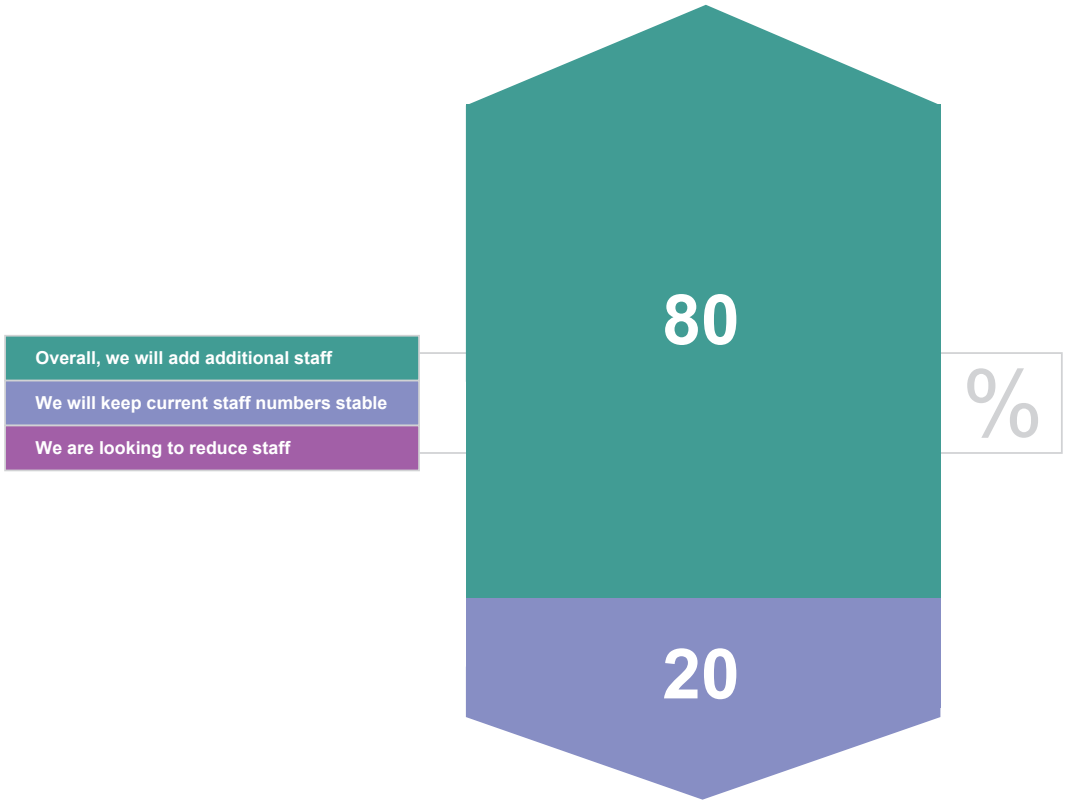

(10 answers in total)

# Detailed results for Saudi Arabia

## Operating Profits compared to the previous year




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

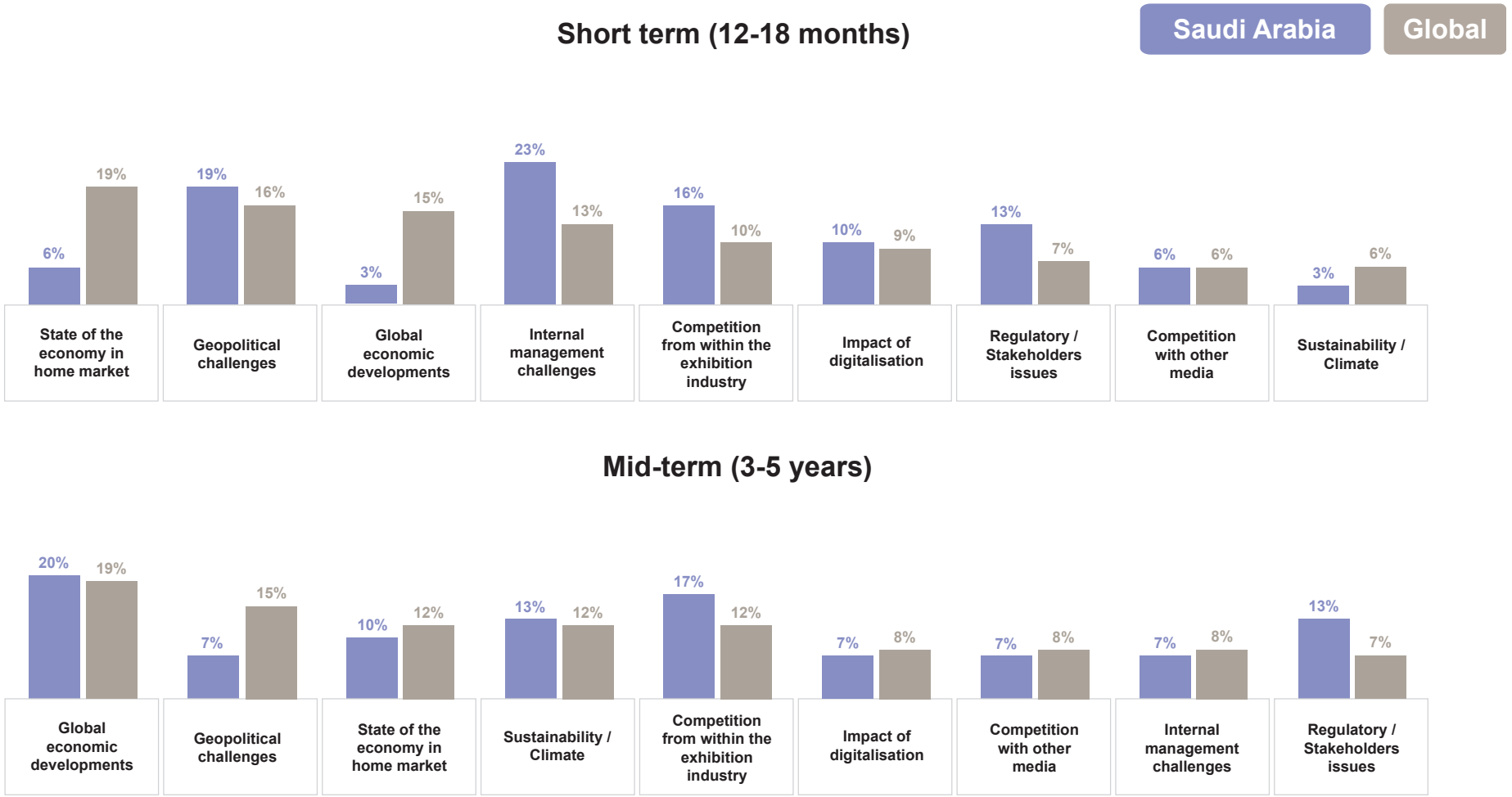





(10 answers in total)

# Detailed results for Saudi Arabia

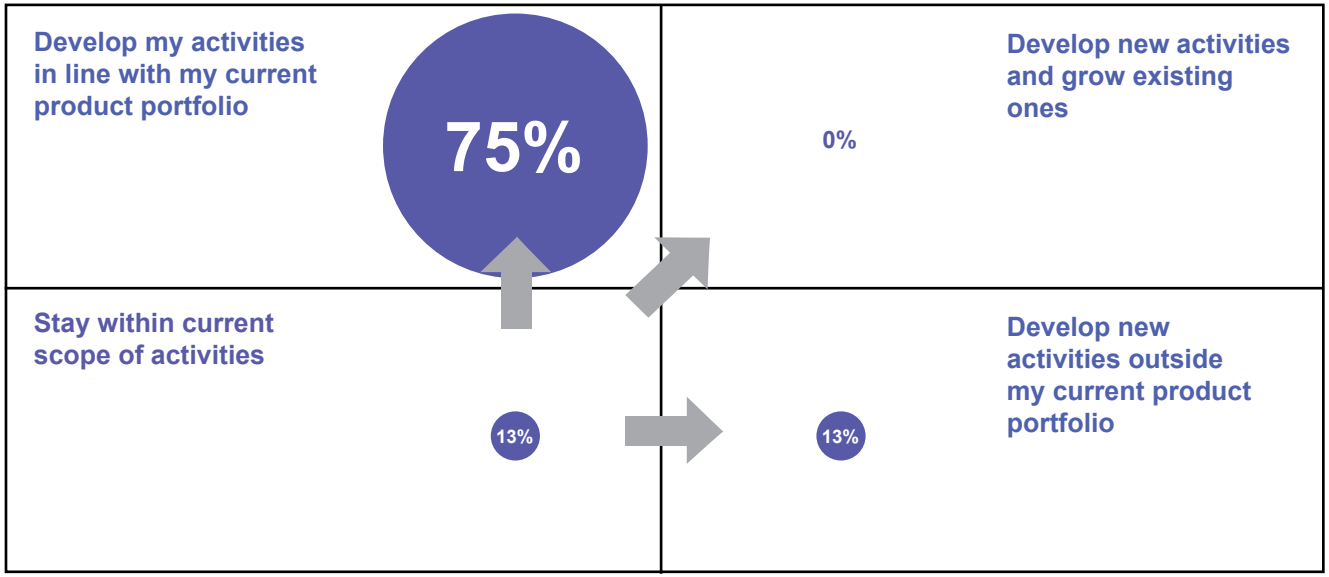
## Most important business issues in the exhibition industry right now



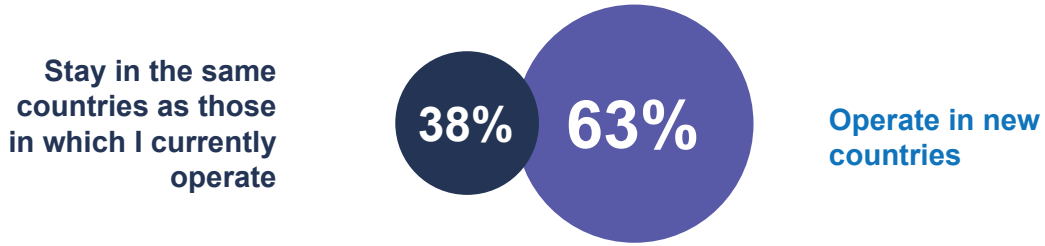
# Detailed results for Saudi Arabia

## Current Strategic Priorities Related To:

### Range of Activities



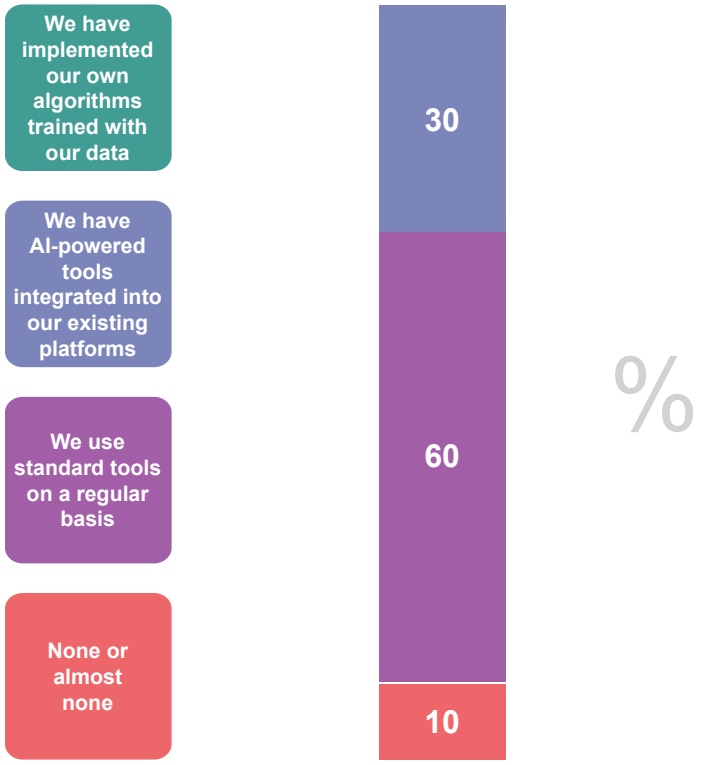

### Geographic Exposure



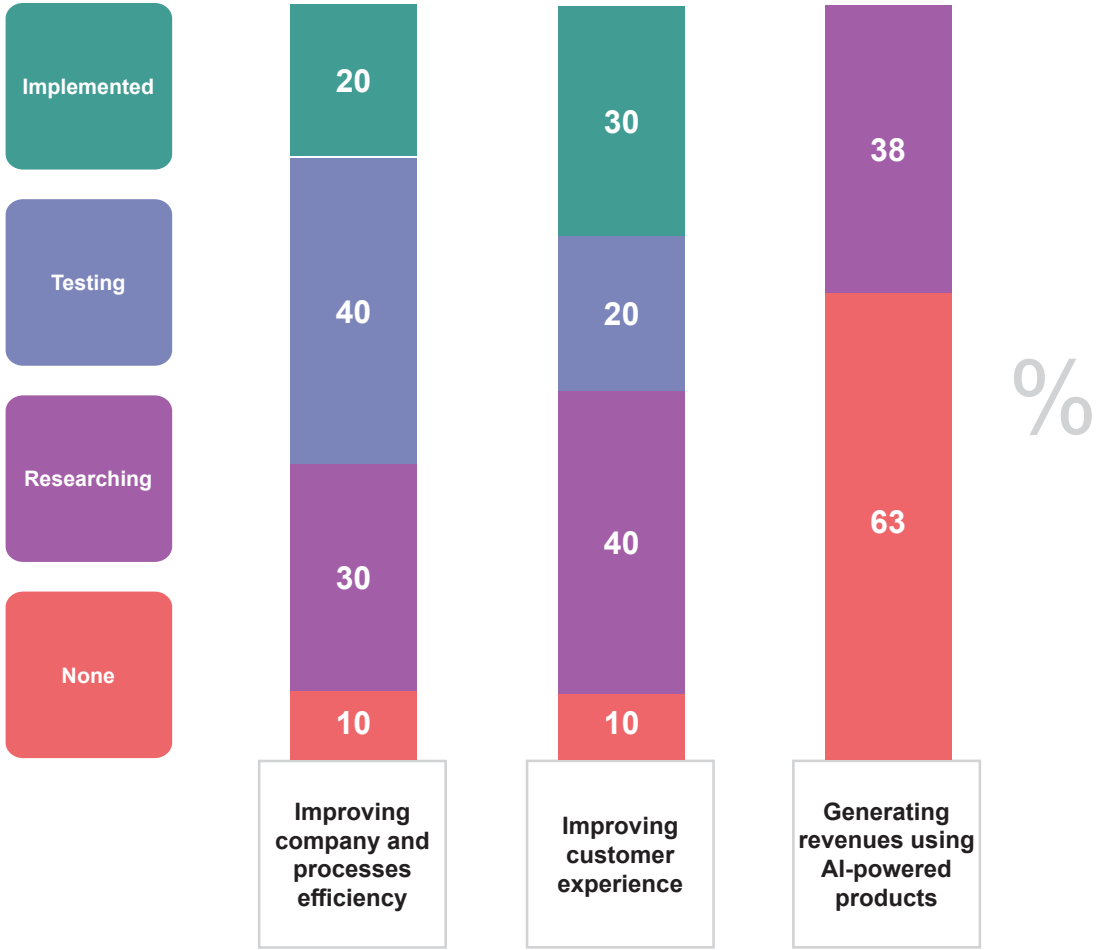
# Detailed results for Saudi Arabia

## Generative AI Applications

### Level of Implementation




### Level of Maturity

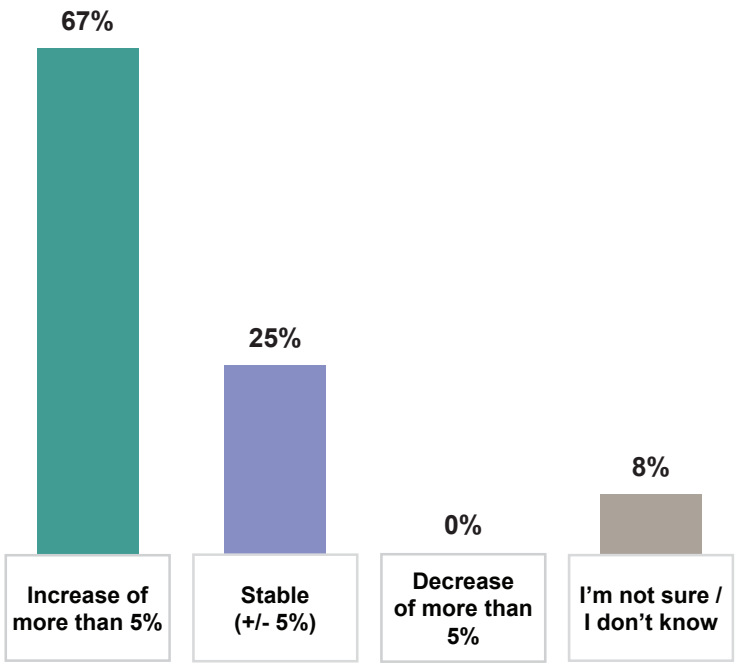




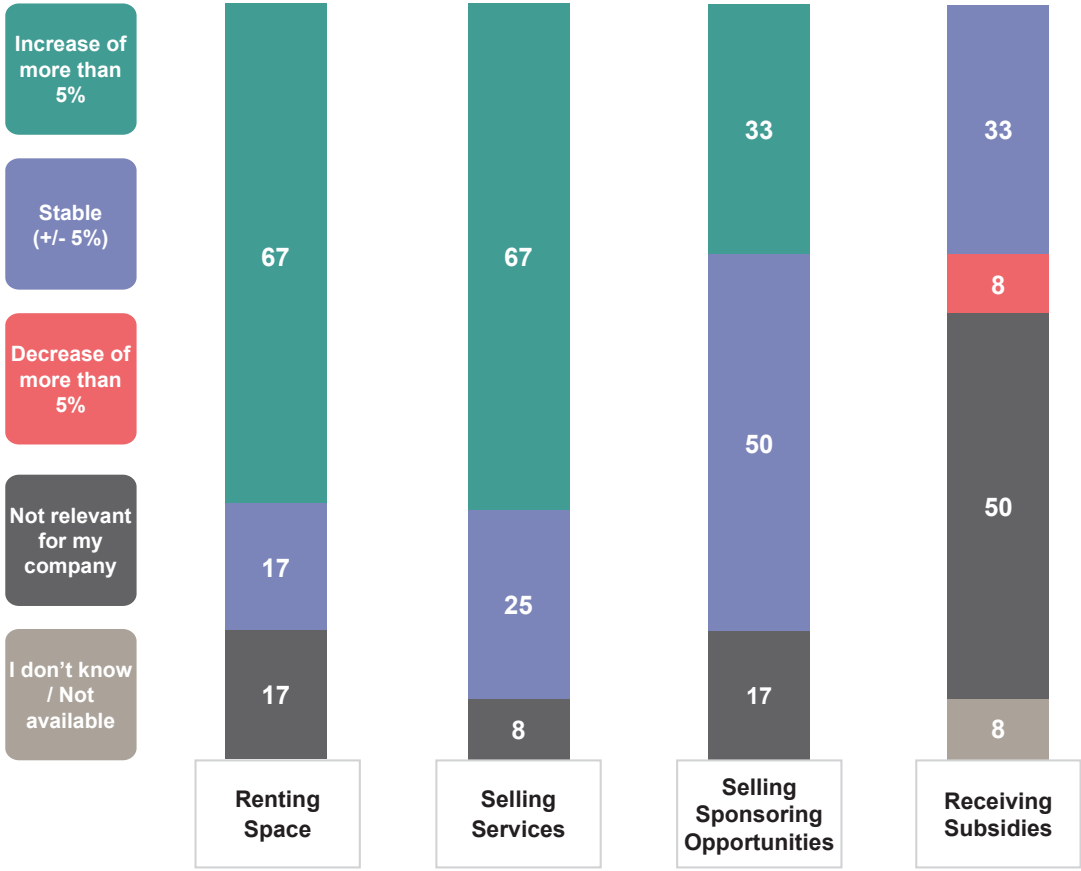

(10 answers in total)

# Detailed results for United Arab Emirates

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

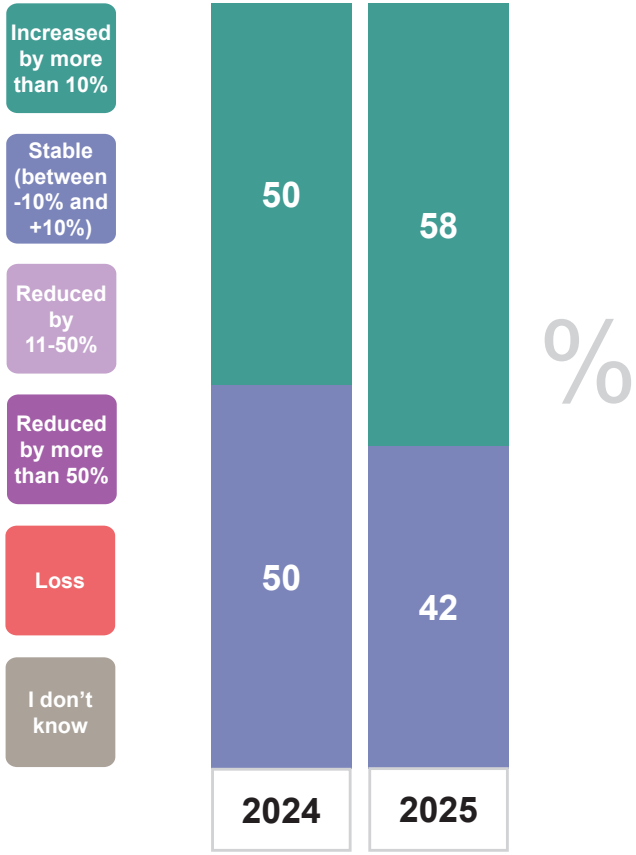




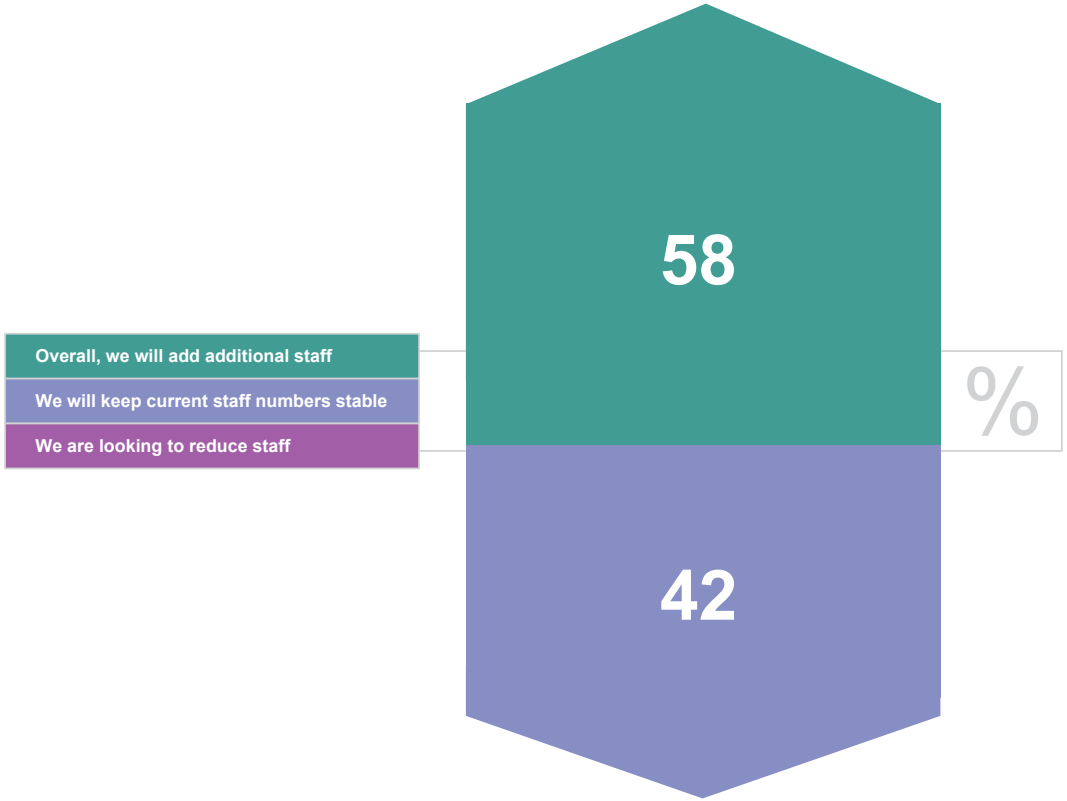

(12 answers in total)

# Detailed results for United Arab Emirates

## Operating Profits compared to the previous year




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

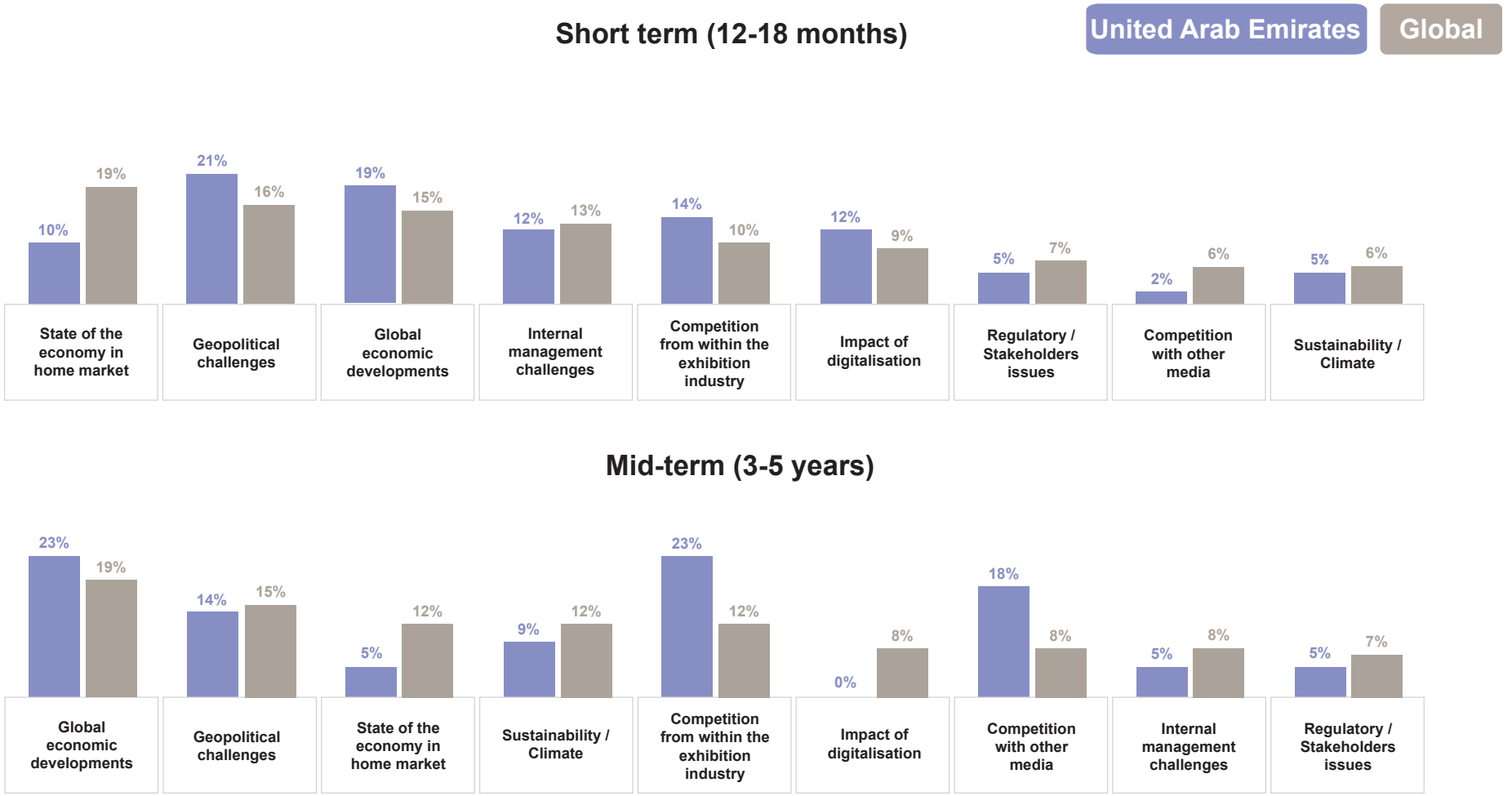





(12 answers in total)

# Detailed results for United Arab Emirates

## Most important business issues in the exhibition industry right now



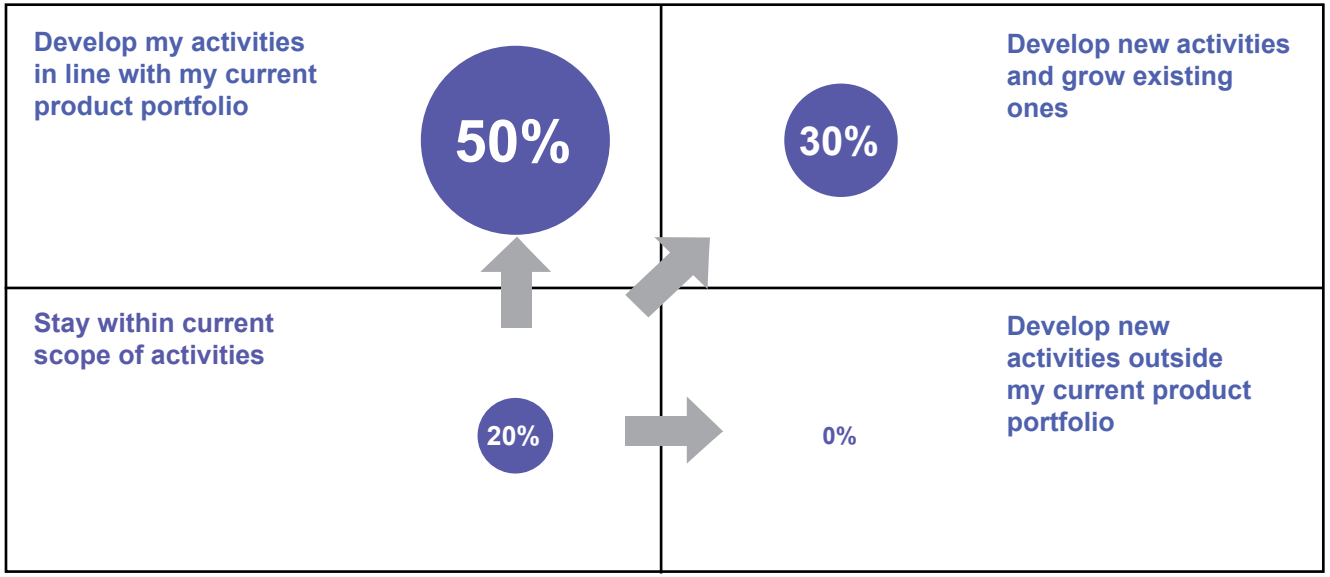



(12 answers in total)

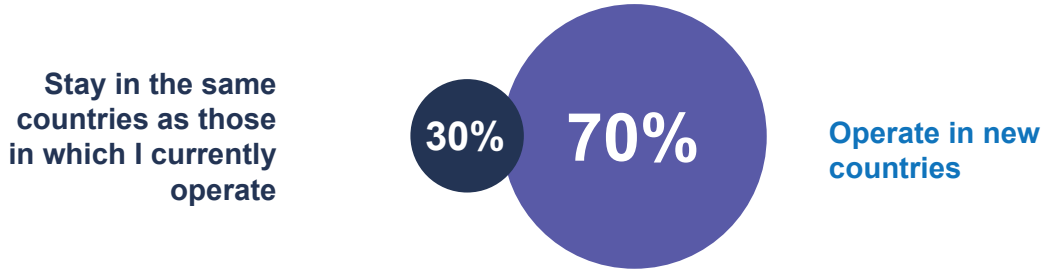
# Detailed results for United Arab Emirates

## Current Strategic Priorities Related To:

### Range of Activities



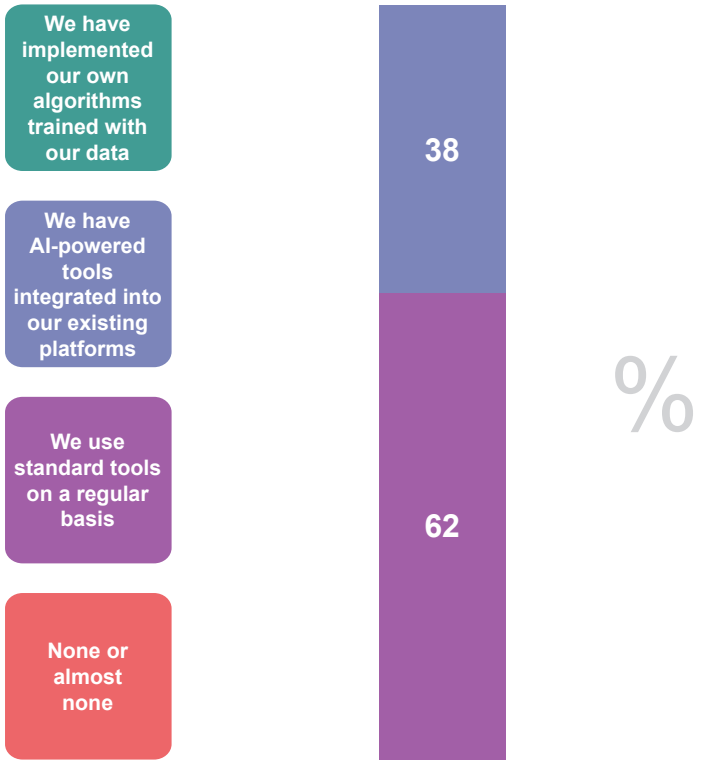

### Geographic Exposure



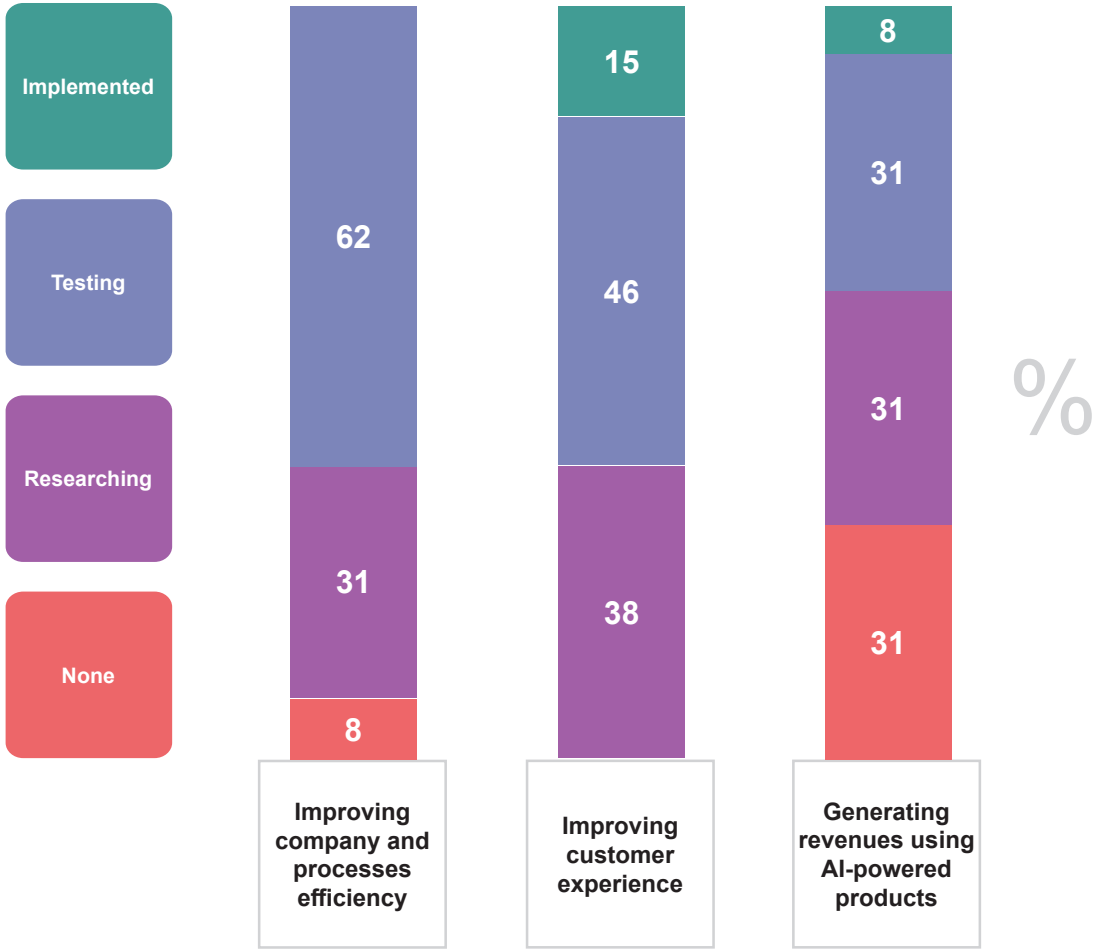
# Detailed results for United Arab Emirates

## Generative AI Applications

### Level of Implementation




### Level of Maturity

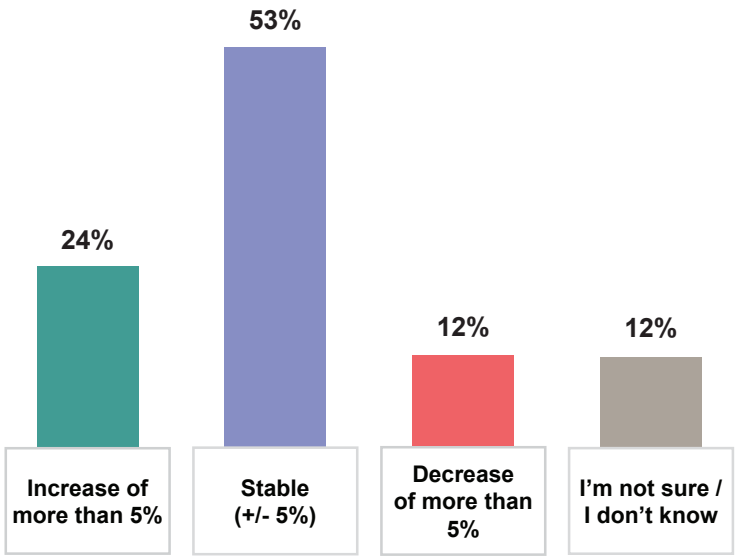




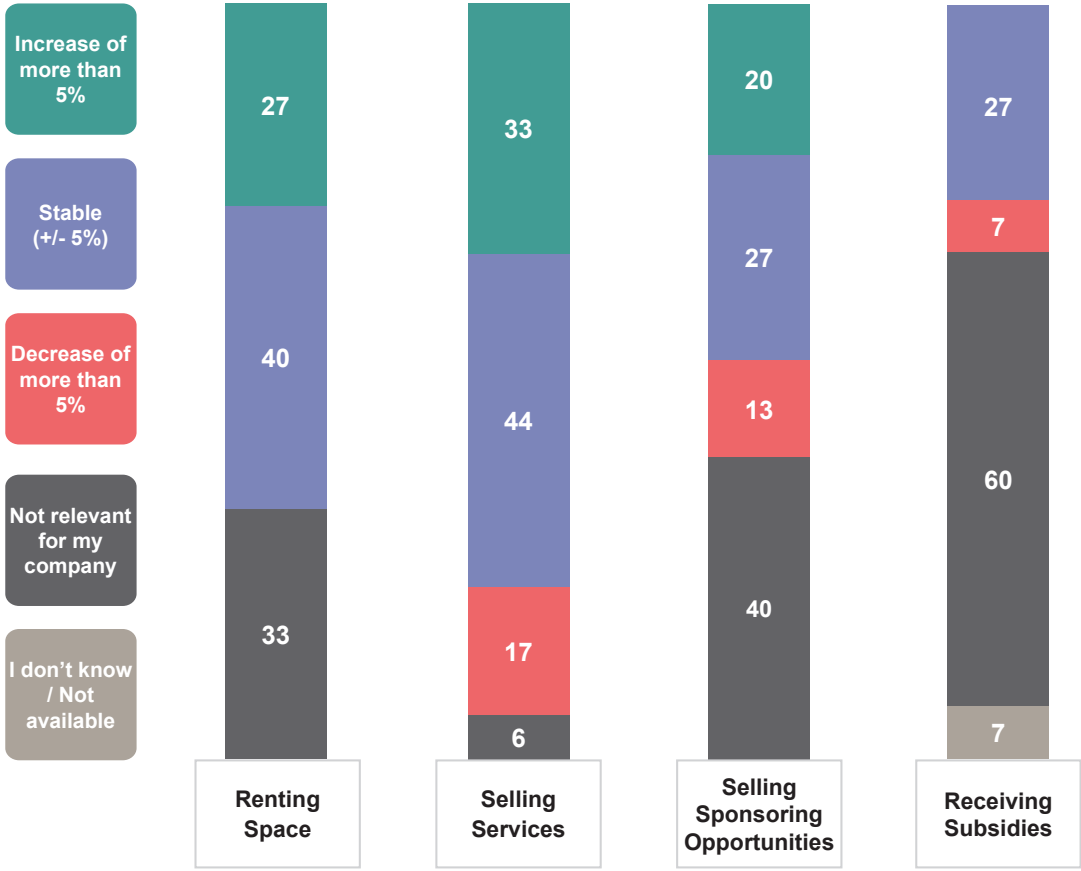

(12 answers in total)

# Detailed results for South Africa

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

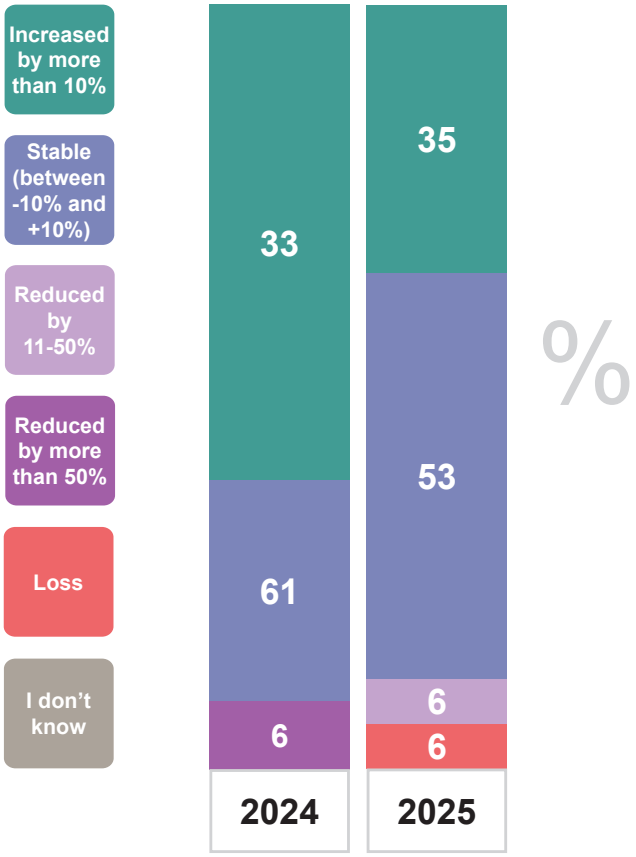




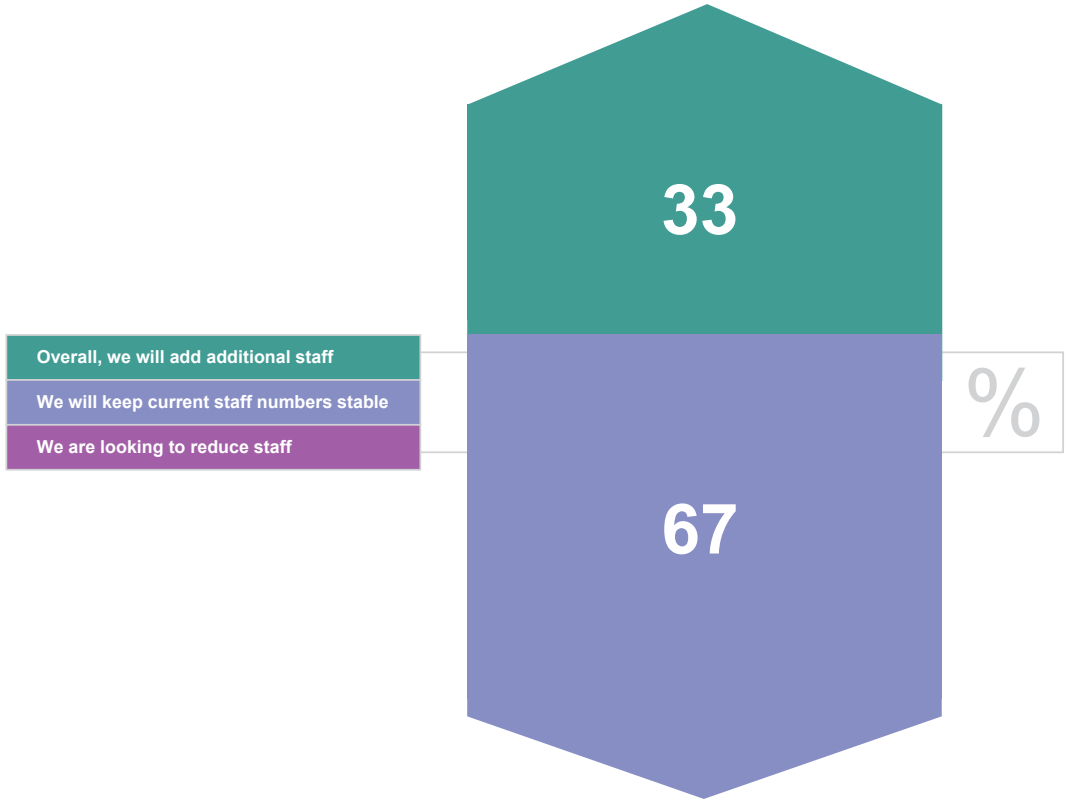

(18 answers in total)

# Detailed results for South Africa

## Operating Profits compared to the previous year




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

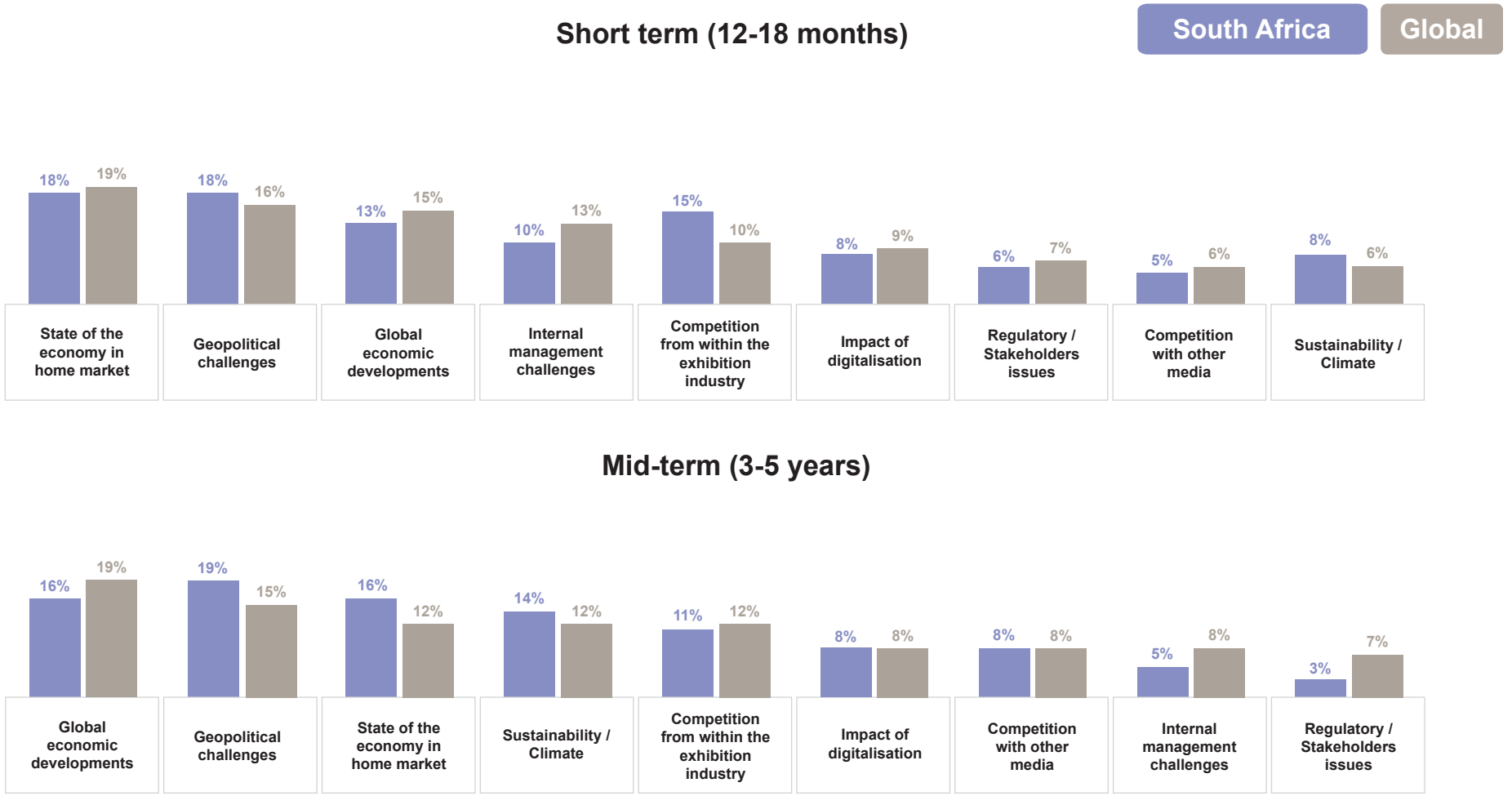





(18 answers in total)

# Detailed results for South Africa

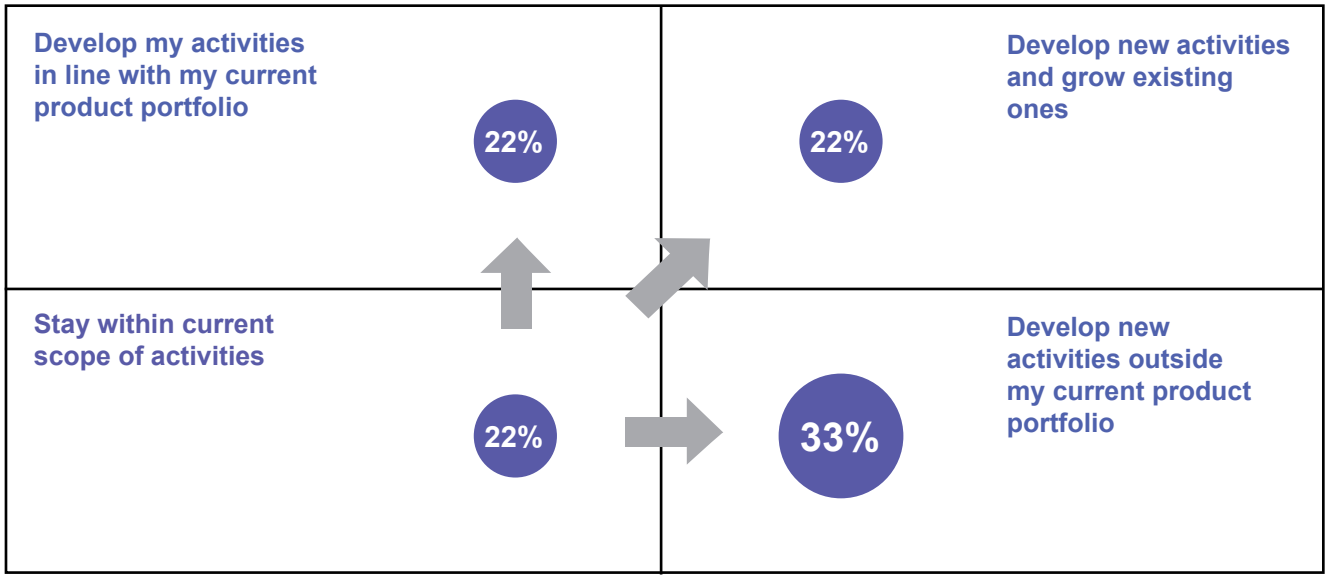
## Most important business issues in the exhibition industry right now



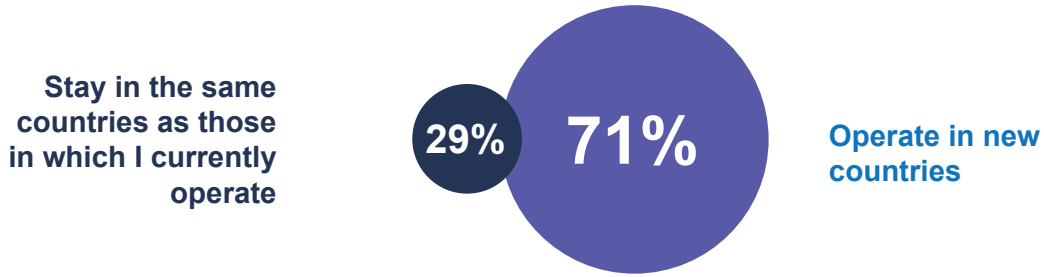
# Detailed results for South Africa

## Current Strategic Priorities Related To:

### Range of Activities



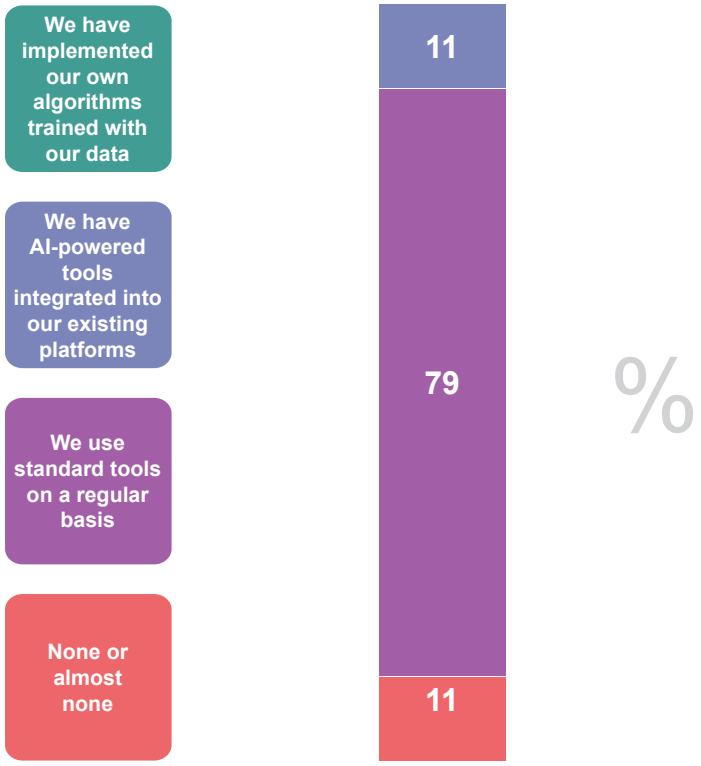

### Geographic Exposure



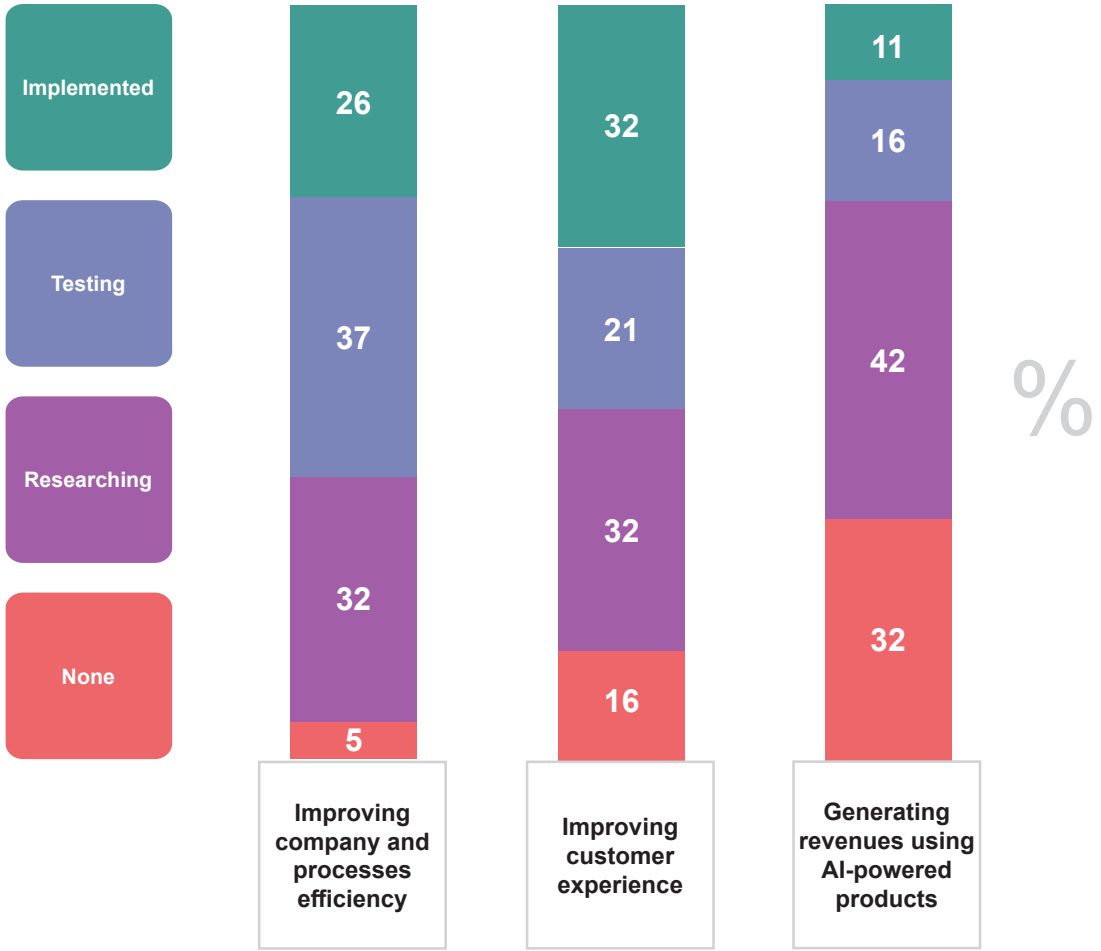
# Detailed results for South Africa

## Generative AI Applications

### Level of Implementation

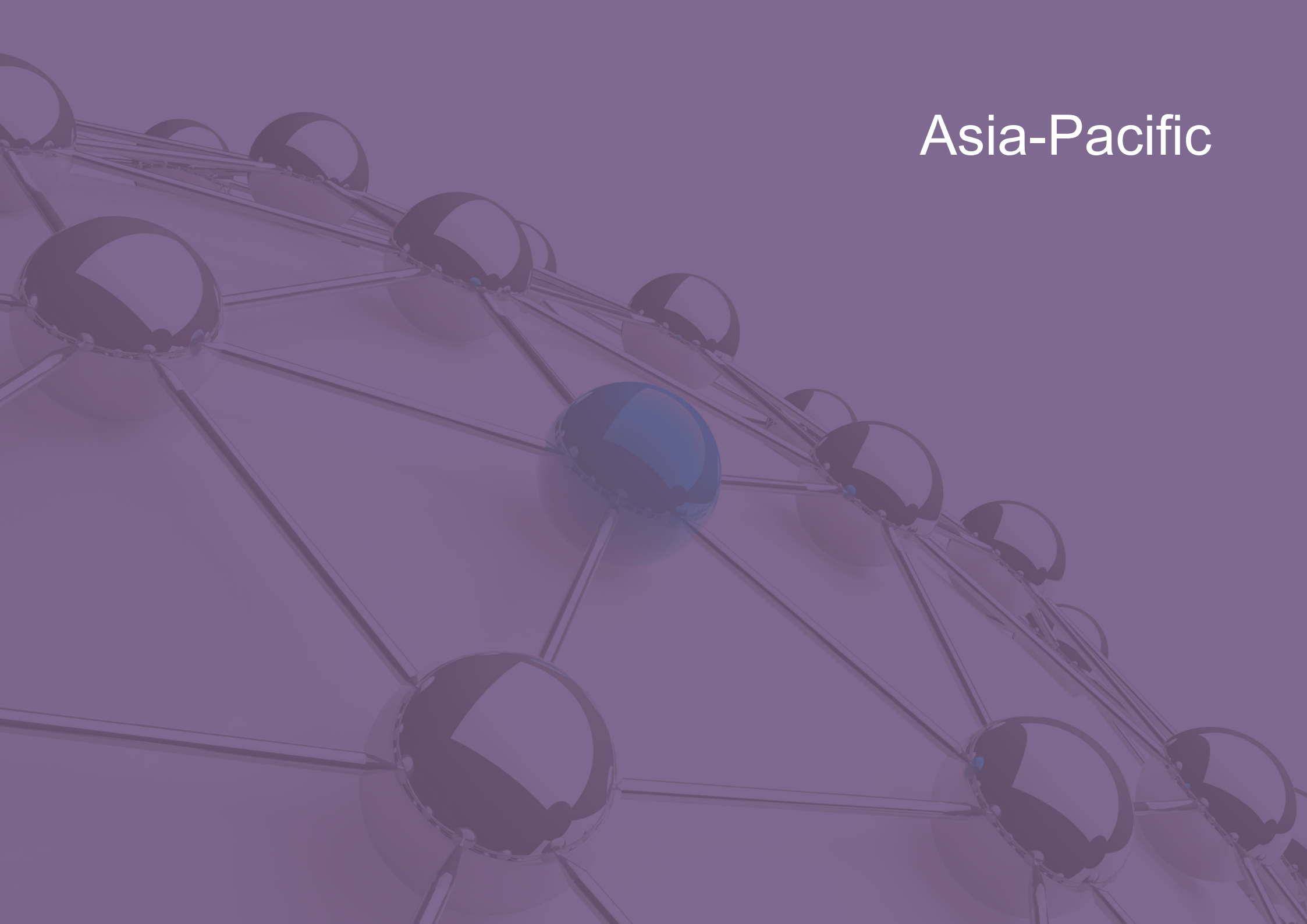



### Level of Maturity



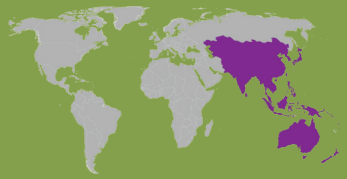



(18 answers in total)



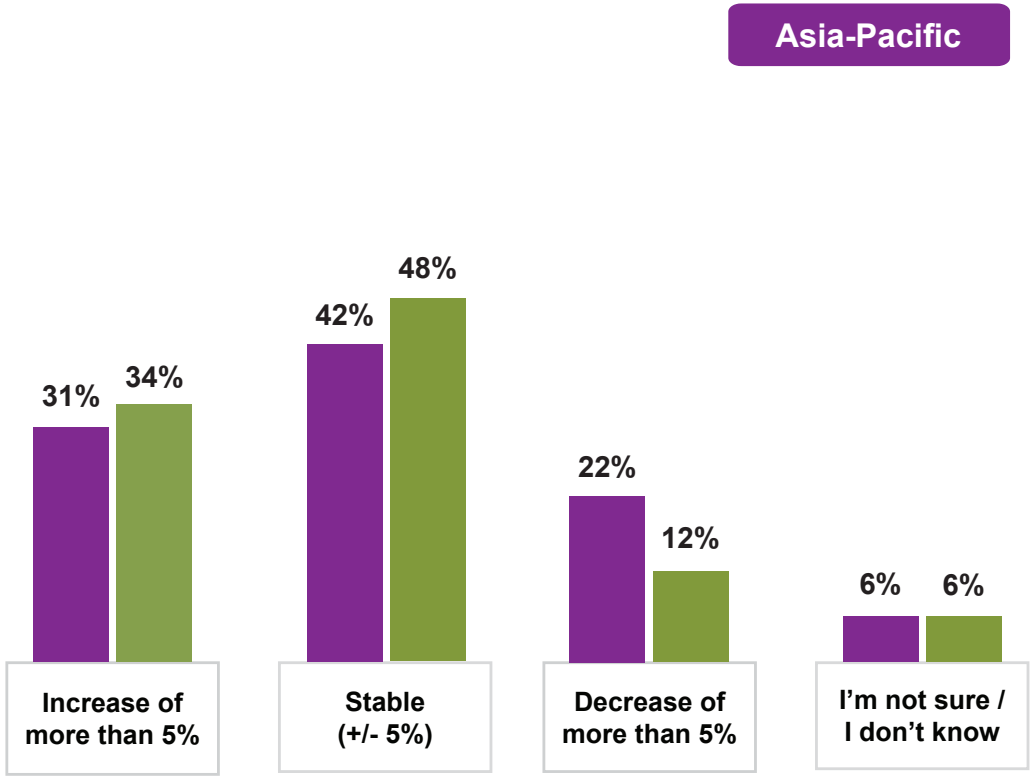
# Asia-Pacific

# Rented Space
# Asia-Pacific

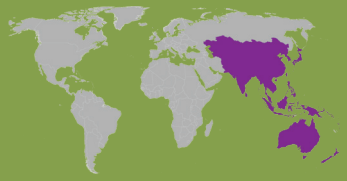


The Global Association of the Exhibition Industry

**Aggregated Country Forecast 2025 compared to 2024**

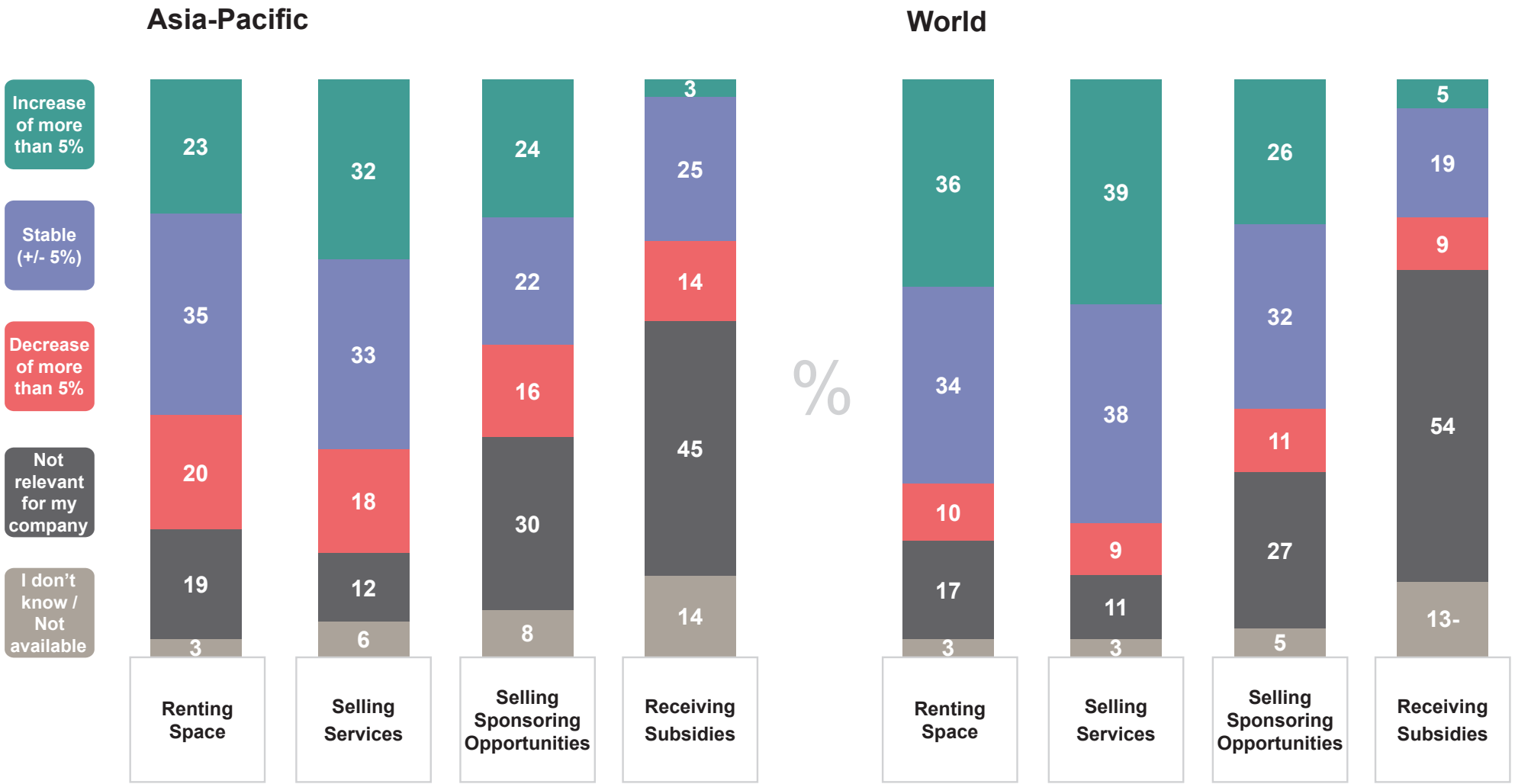


# Revenues
# Asia-Pacific



ufi The Global Association of the Exhibition Industry

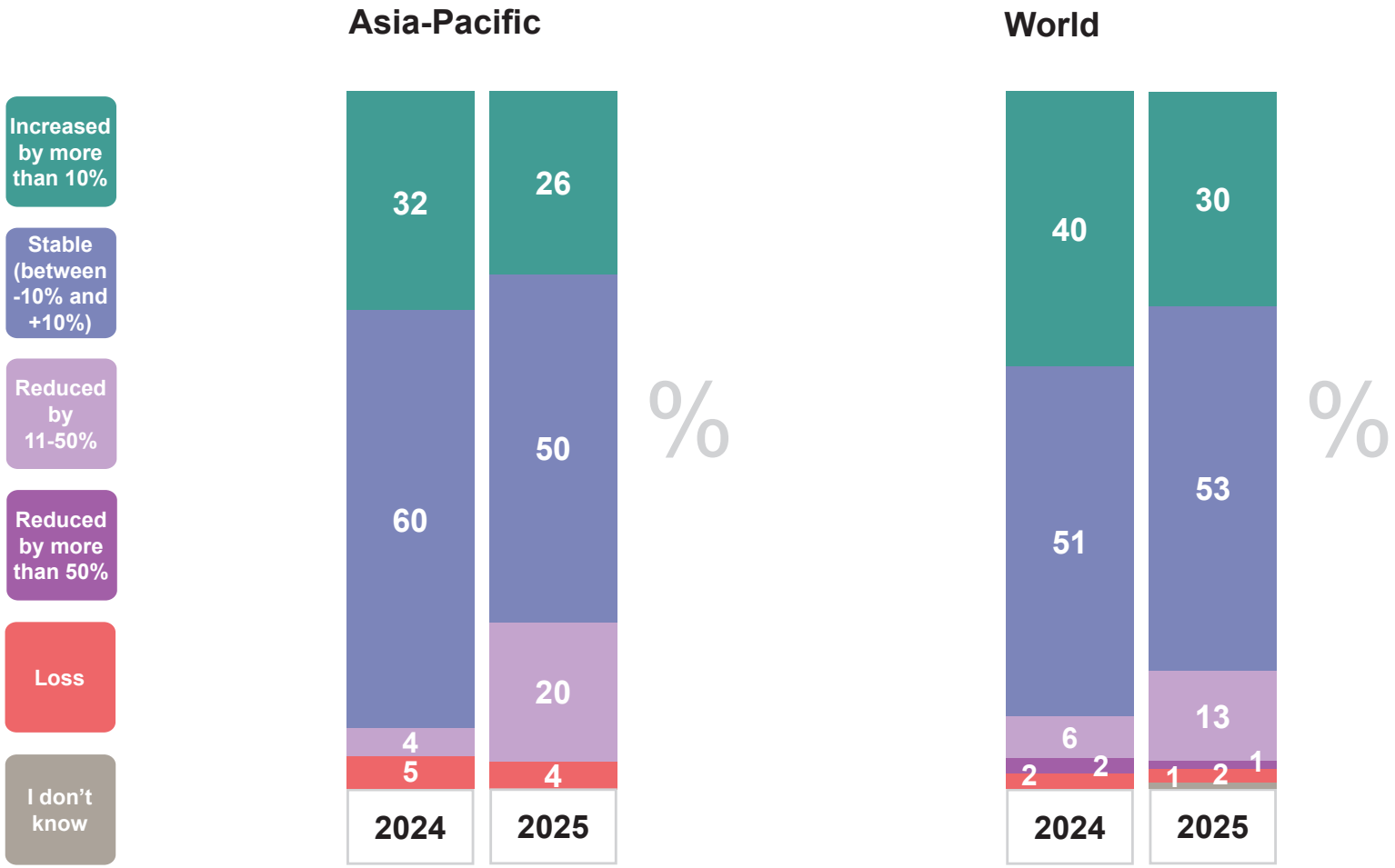
## Company Exhibition-Related Revenues Forecast 2025 compared to 2024, by category



# Operating Profit
# Asia-Pacific

ufi The Global Association of the Exhibition Industry

## Operating Profits
## compared to the previous year



# Workforce
# Asia-Pacific

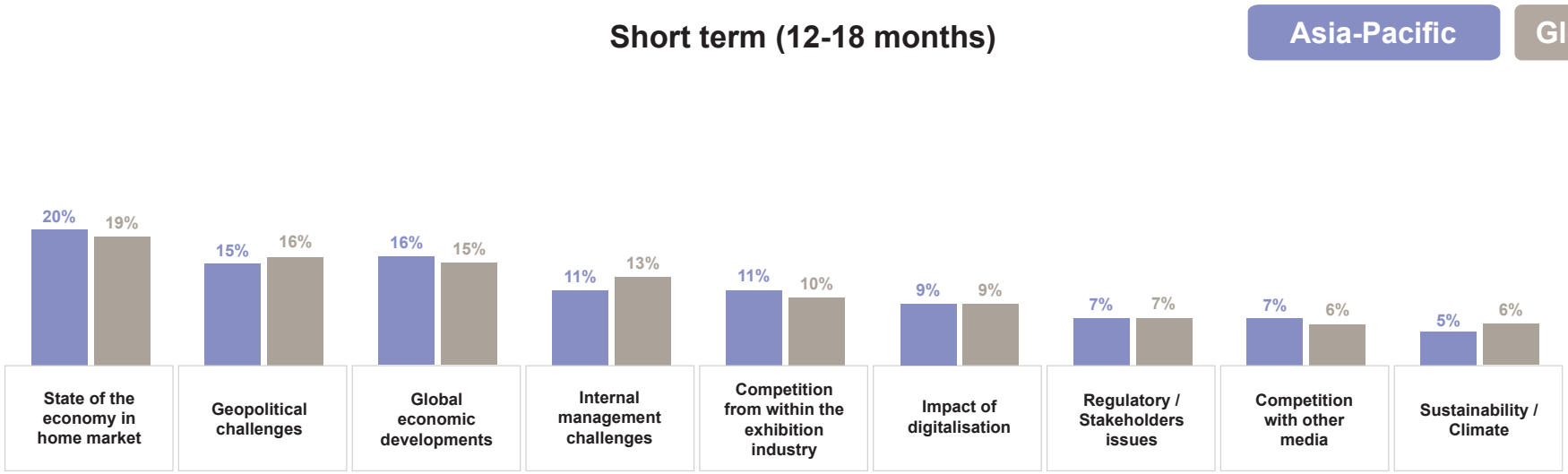
The Global Association of the Exhibition Industry

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

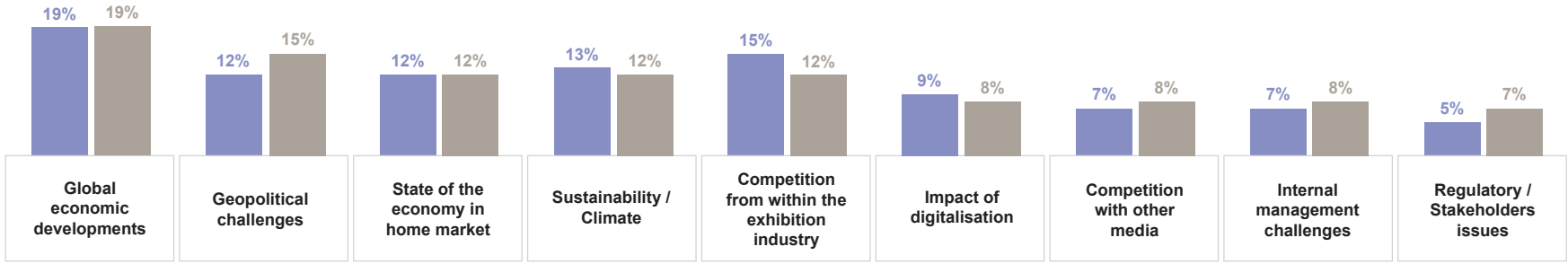
# Most Important Business Issues
# Asia-Pacific

The Global Association of the Exhibition Industry

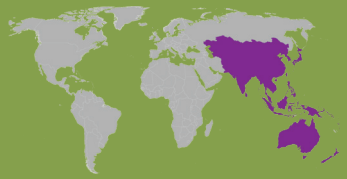
## Short term (12-18 months)



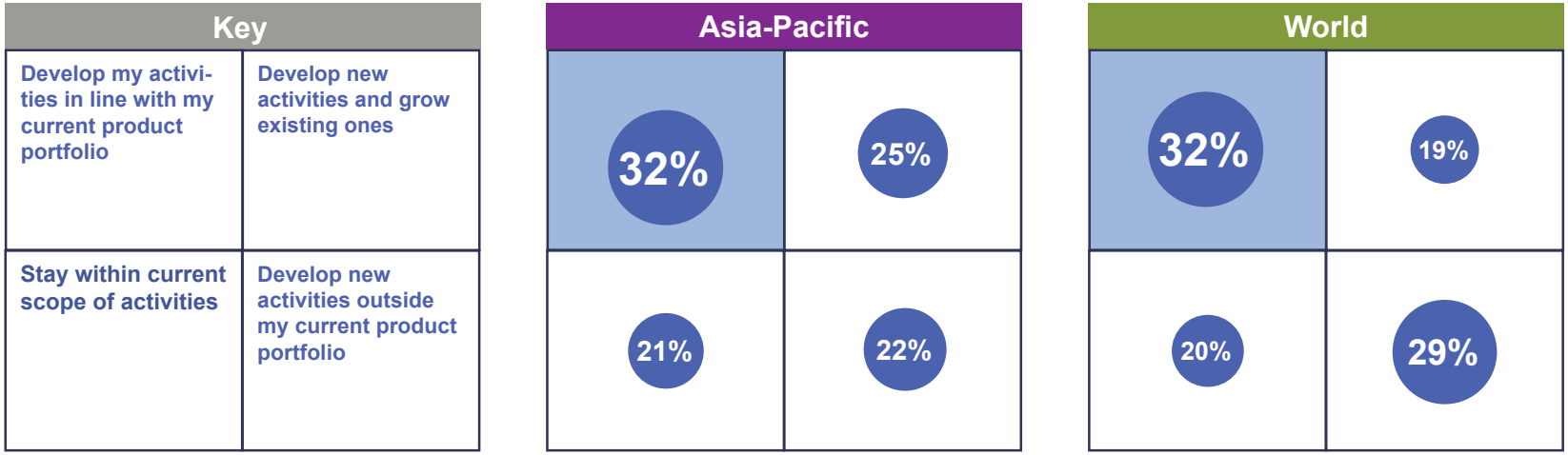

## Mid-term (3-5 years)



# Current Strategic Priorities
# Asia-Pacific

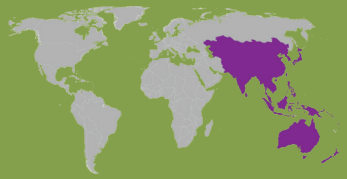


## Range of Activities




## Geographic Exposure

# Generative AI Applications
# Asia-Pacific



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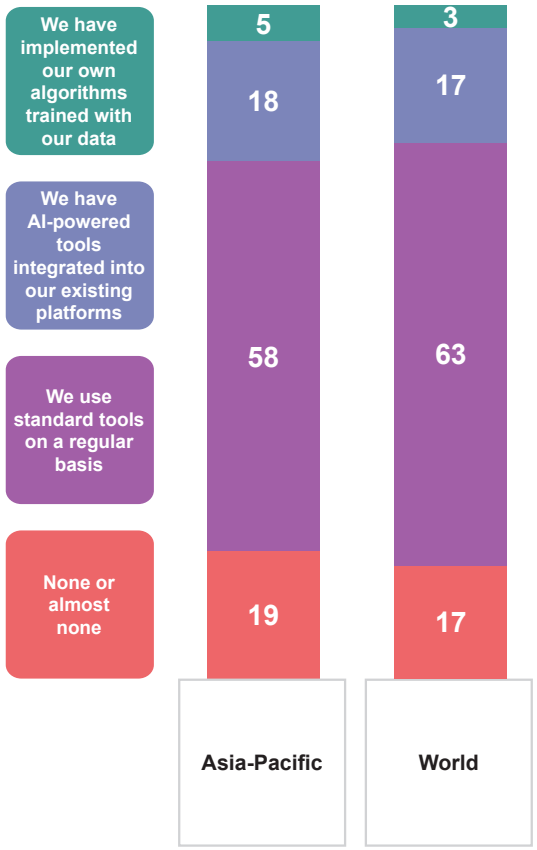
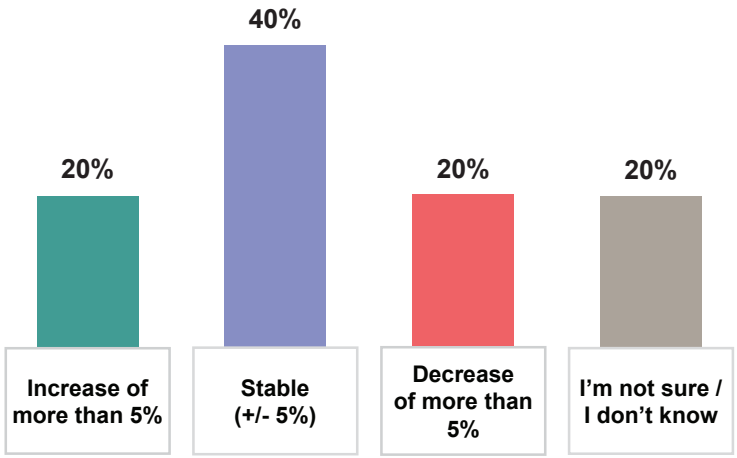
## Level of Implementation



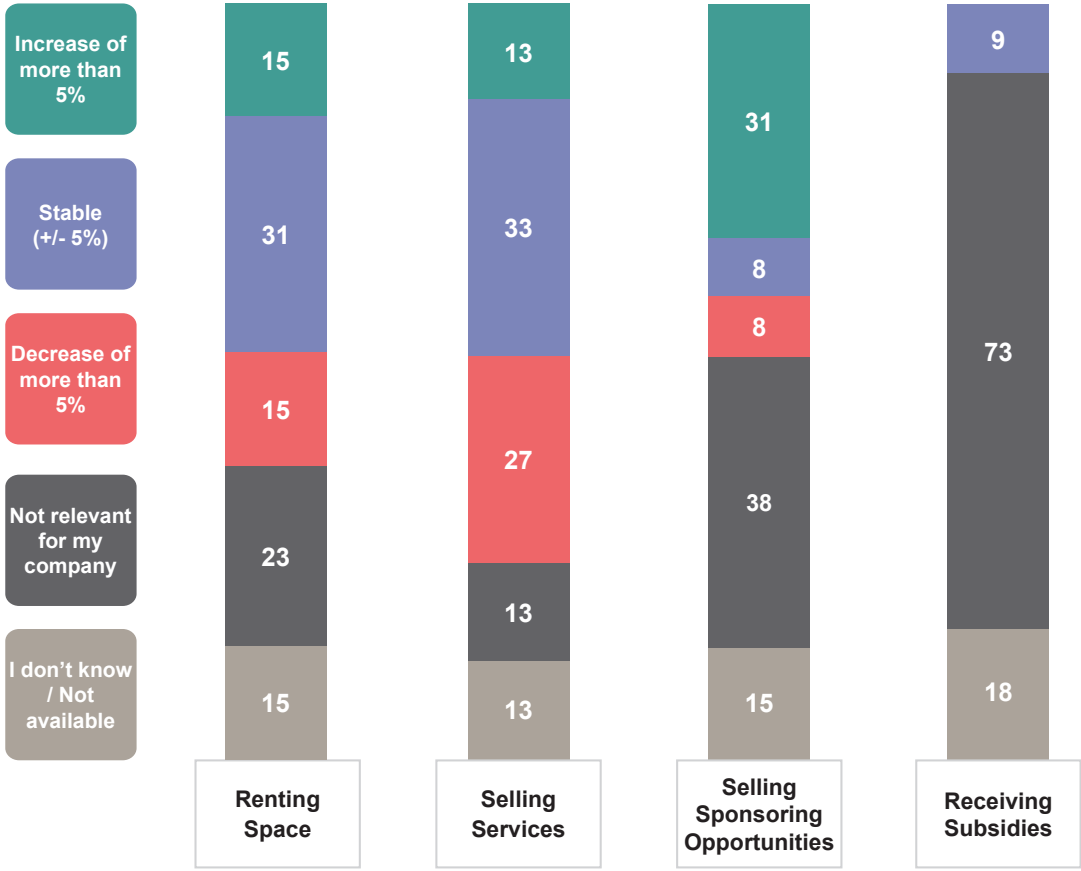

## Level of Maturity

# Detailed results for Australia

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category



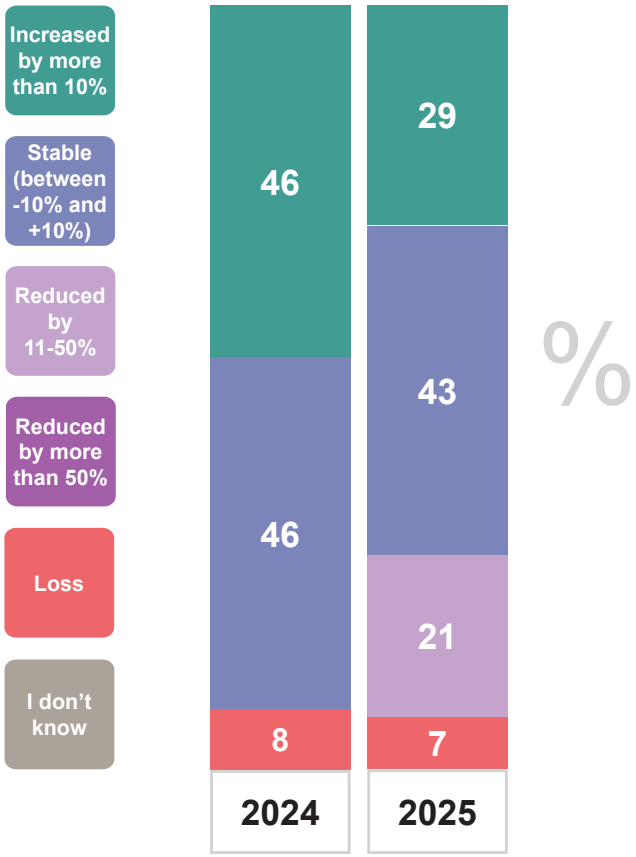



(16 answers in total)

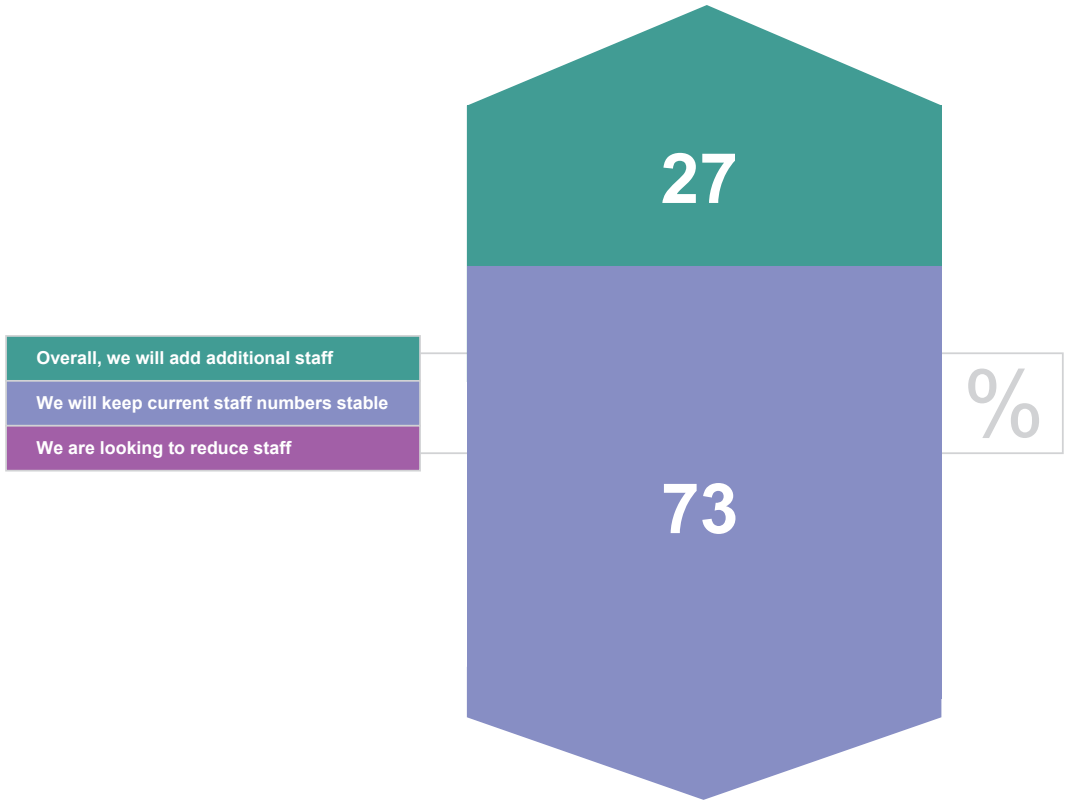
# Detailed results for Australia

ufi The Global Association of the Exhibition Industry

## Operating Profits compared to the previous year




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

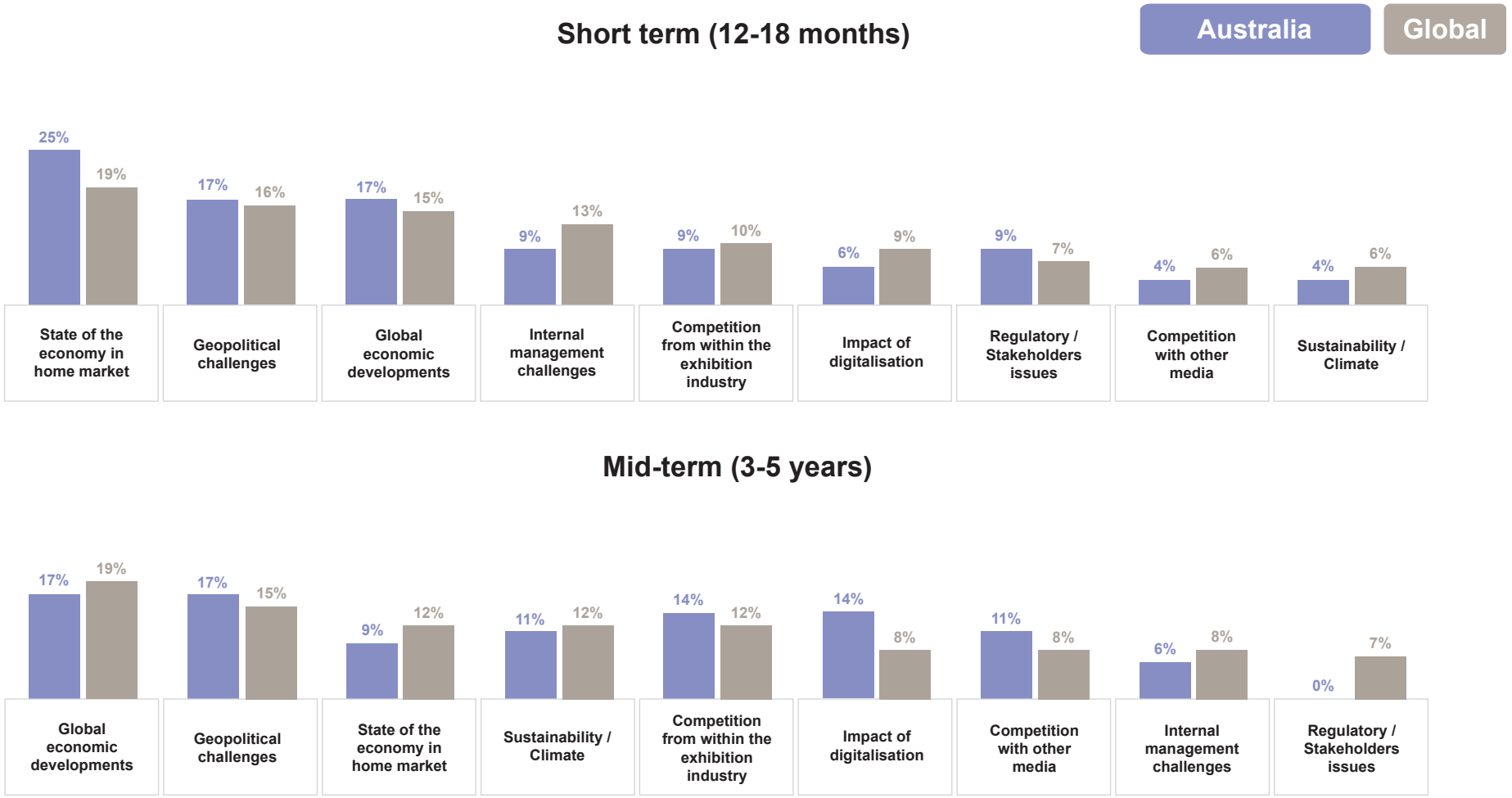





(16 answers in total)

# Detailed results for Australia

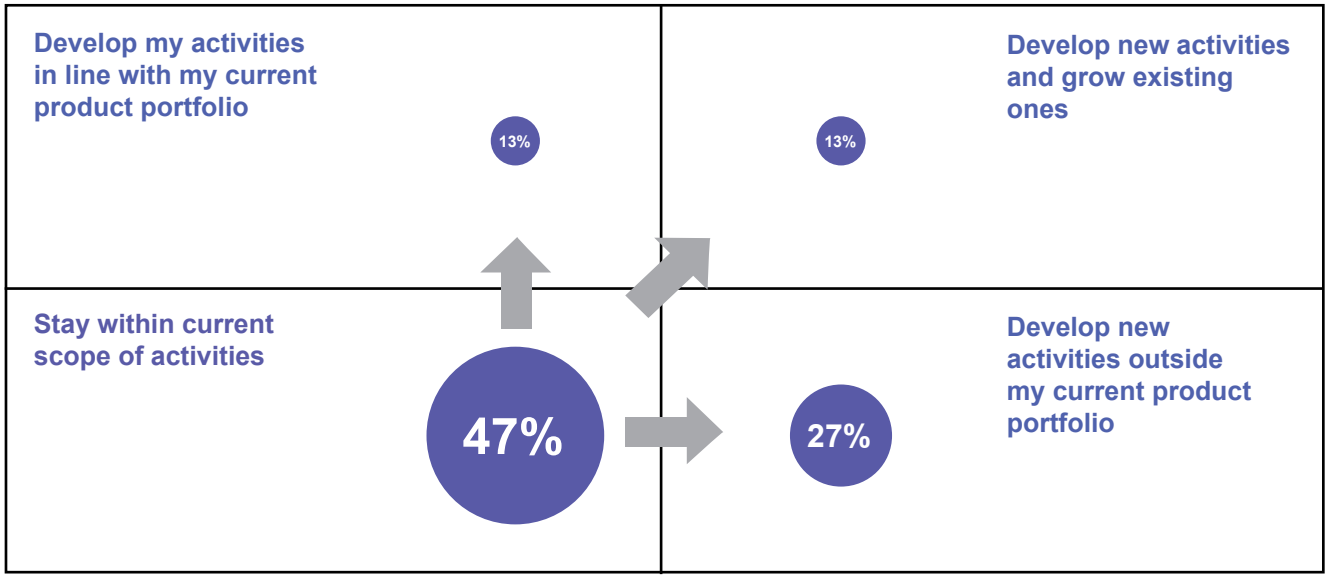
## Most important business issues in the exhibition industry right now



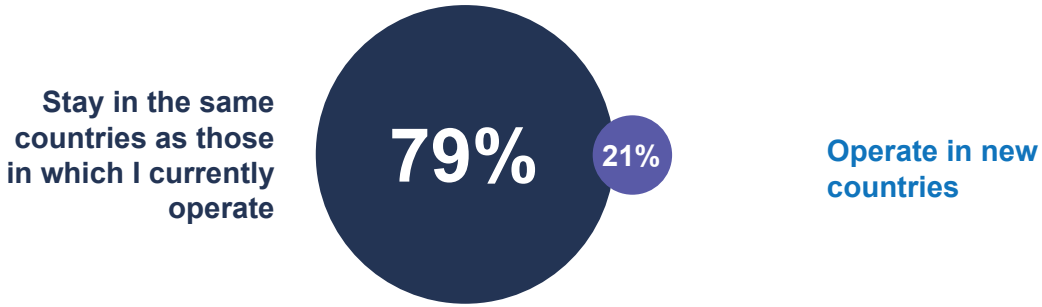
# Detailed results for Australia

## Current Strategic Priorities Related To:

### Range of Activities




### Geographic Exposure



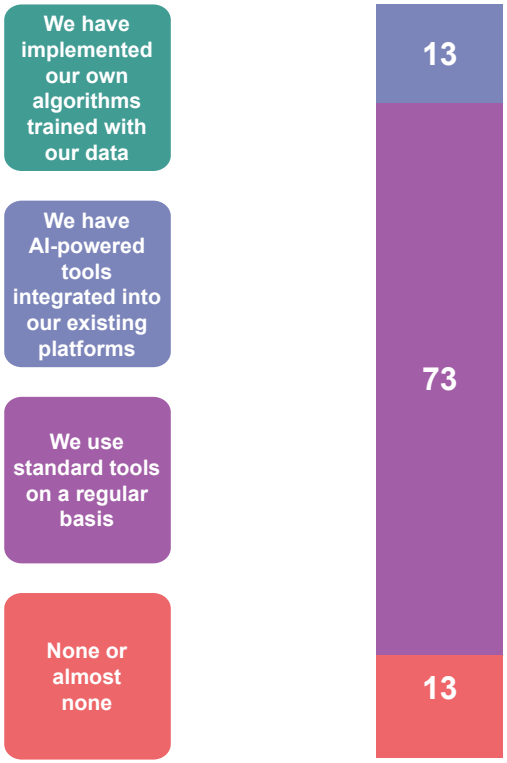



(16 answers in total)

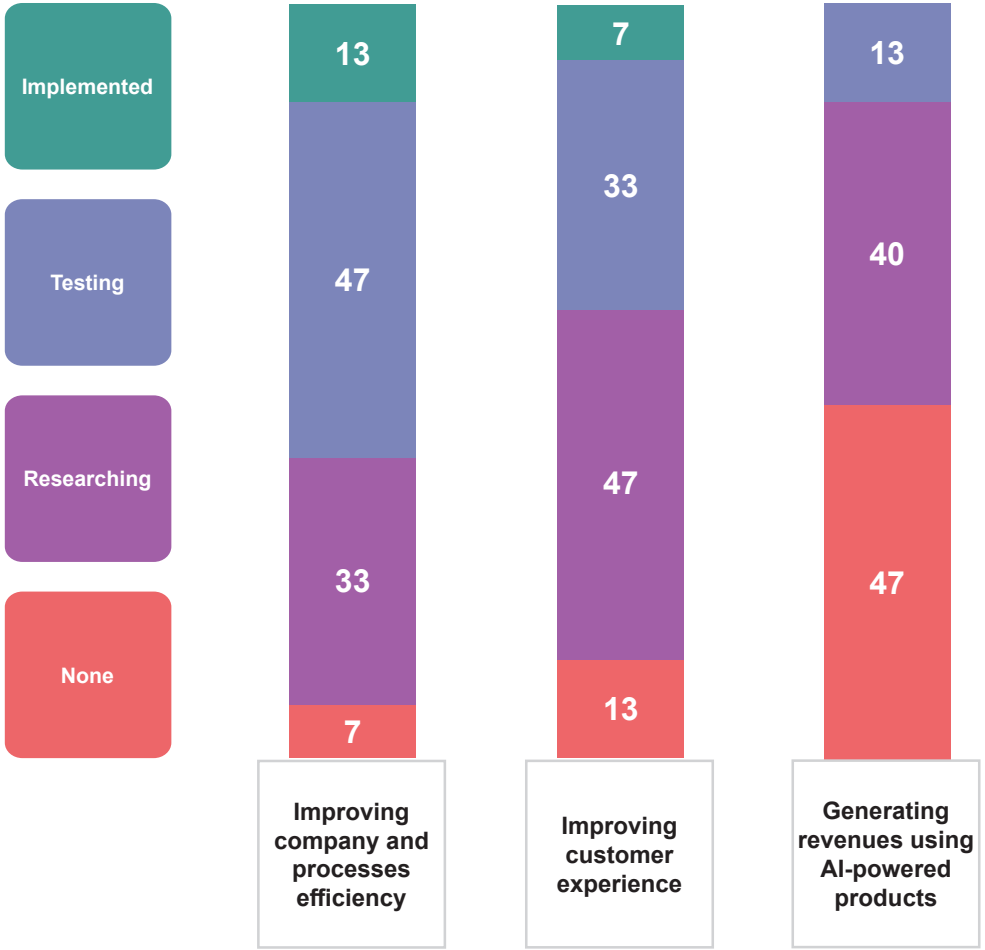
# Detailed results for Australia

## Generative AI Applications

### Level of Implementation




### Level of Maturity

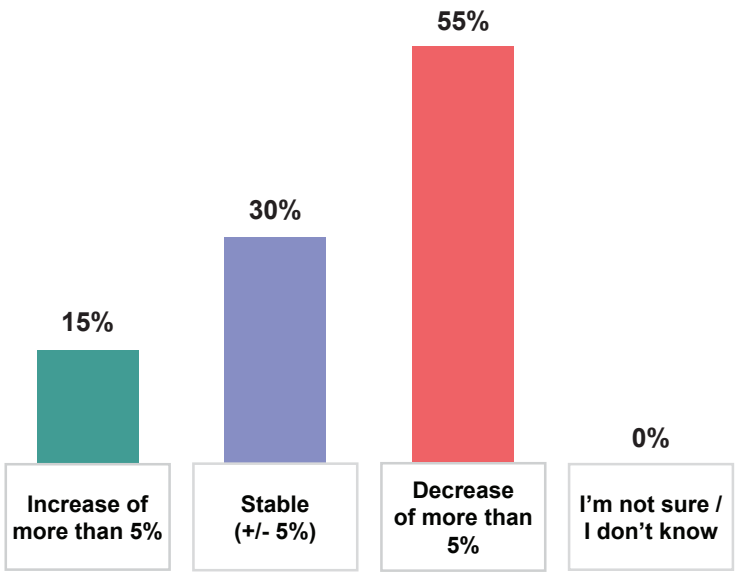




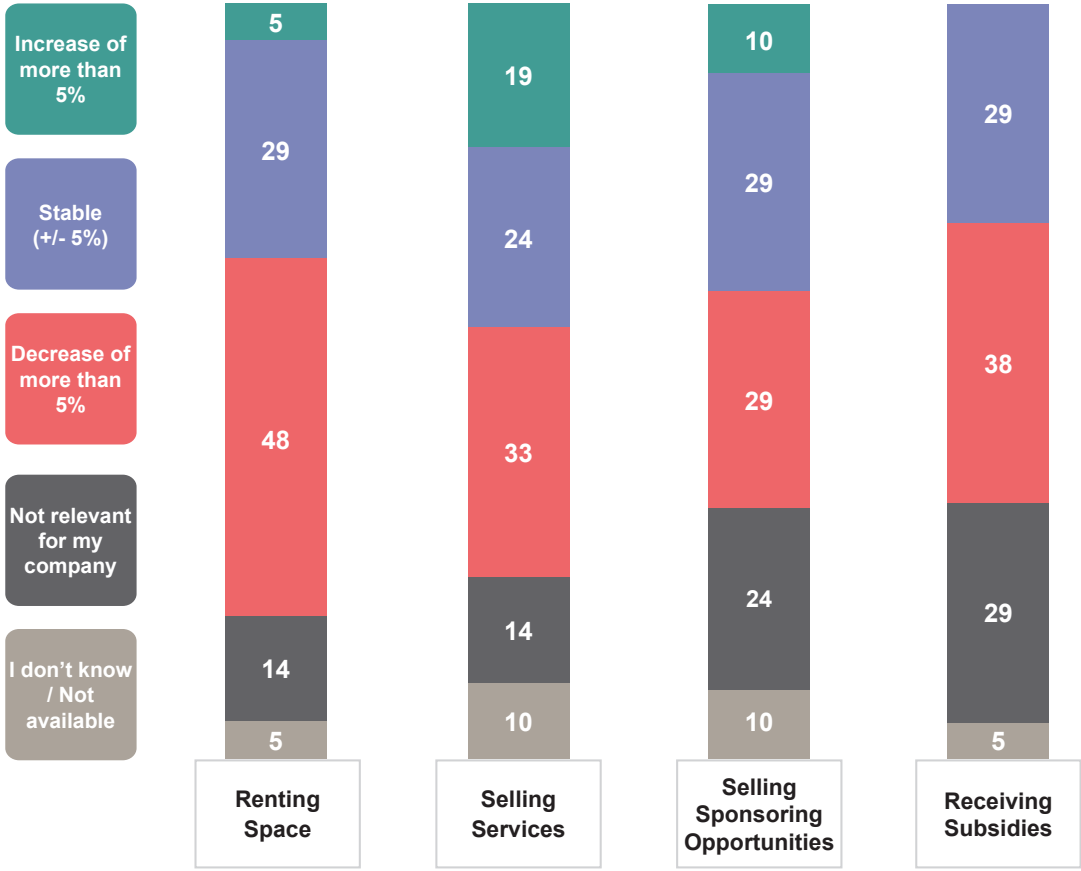

(16 answers in total)

# Detailed results for China

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

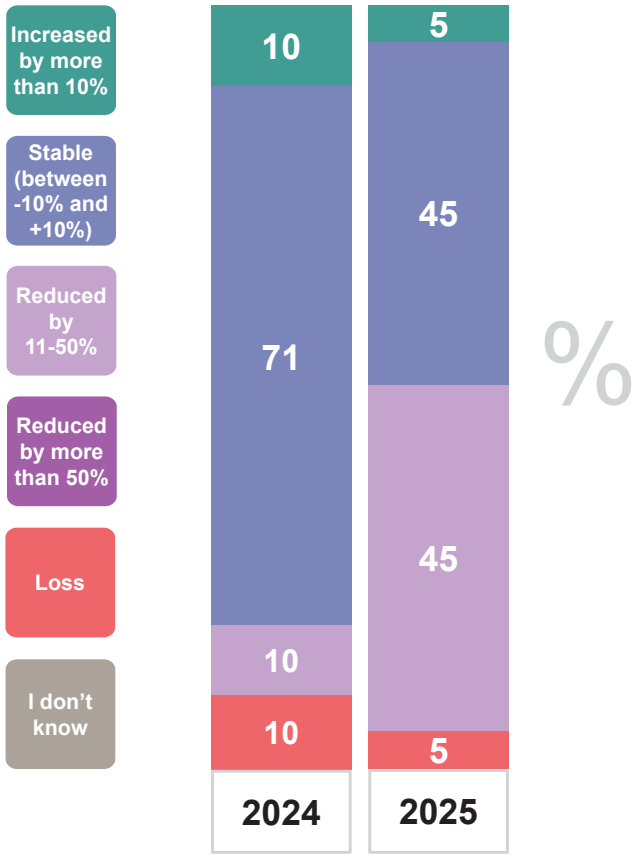




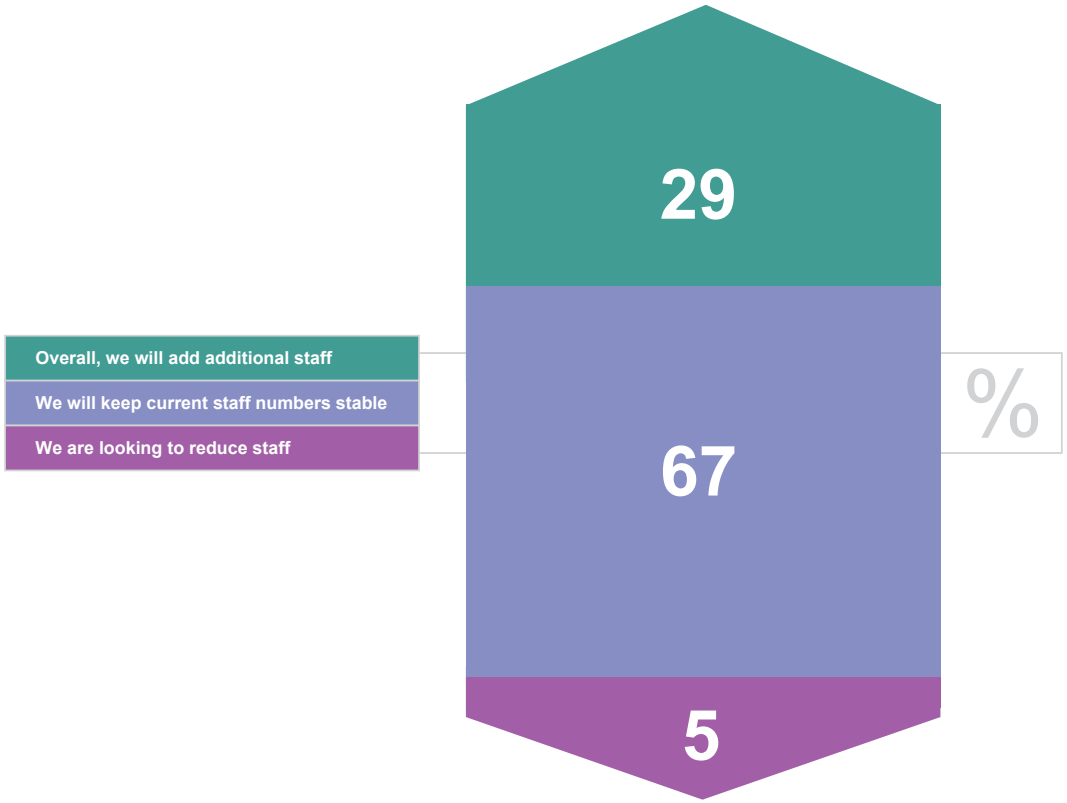

(21 answers in total)

# Detailed results for China

## Operating Profits compared to the previous year




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

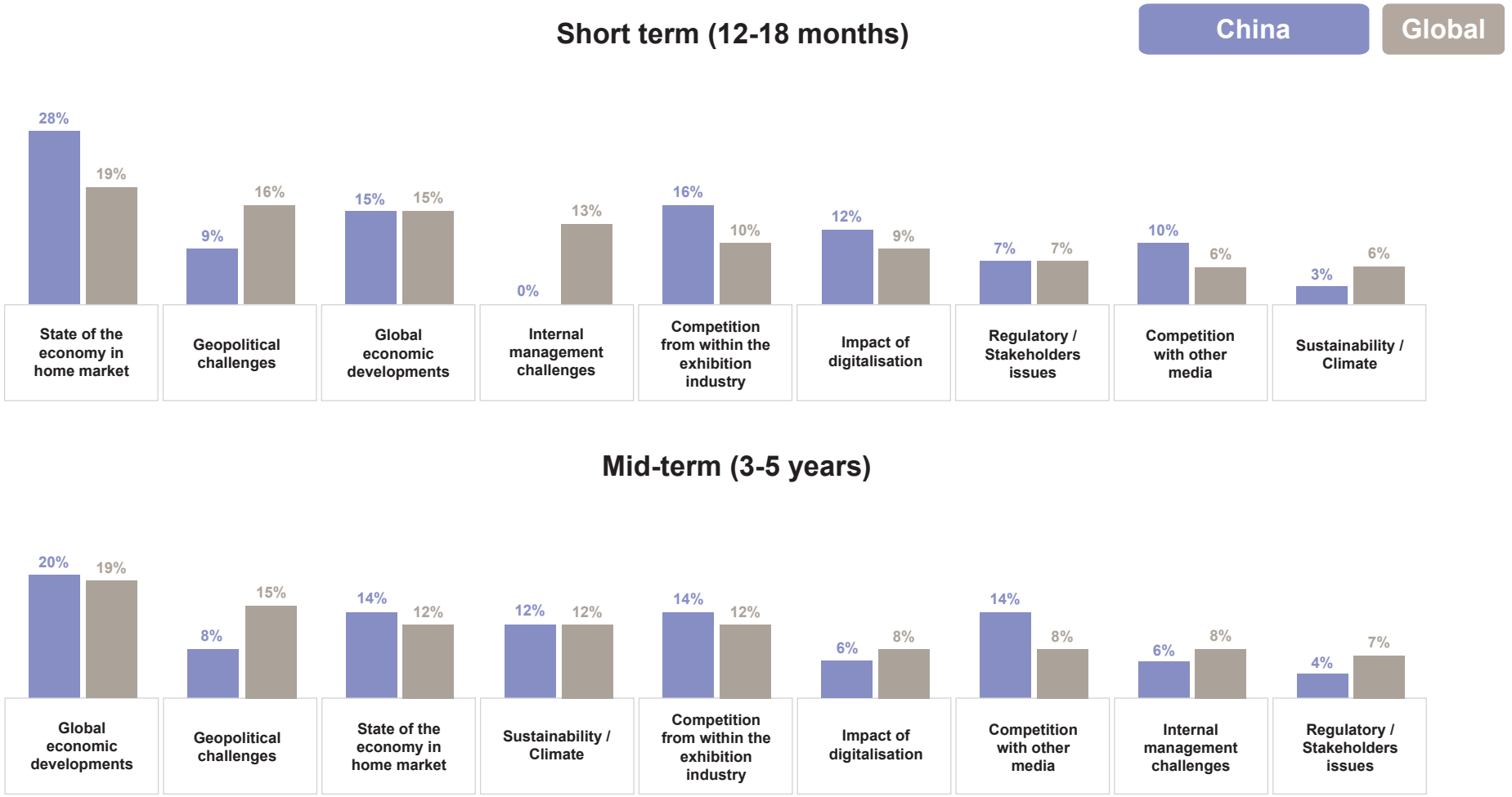





(21 answers in total)

# Detailed results for China

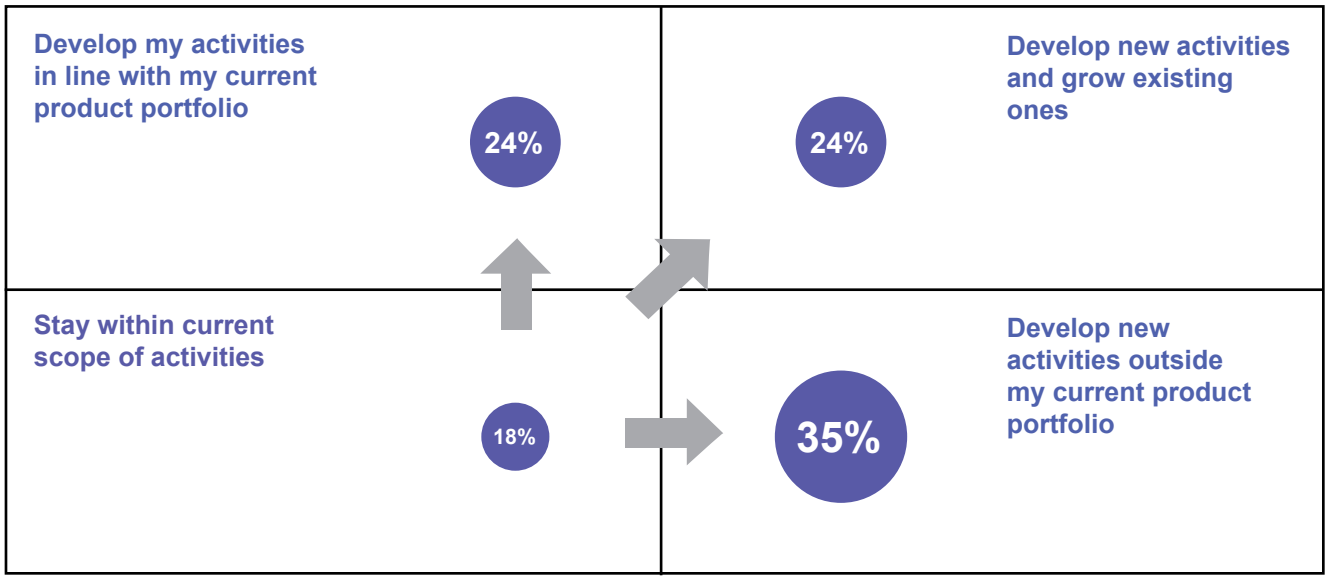
## Most important business issues in the exhibition industry right now



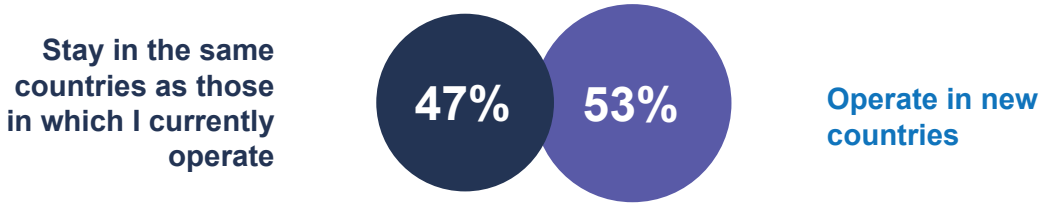
# Detailed results for China

## Current Strategic Priorities Related To:

### Range of Activities



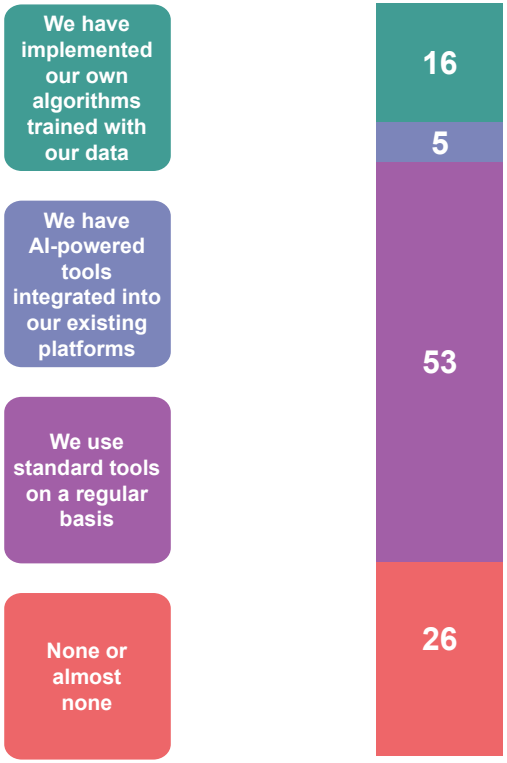

### Geographic Exposure



# Detailed results for China

## Generative AI Applications

### Level of Implementation

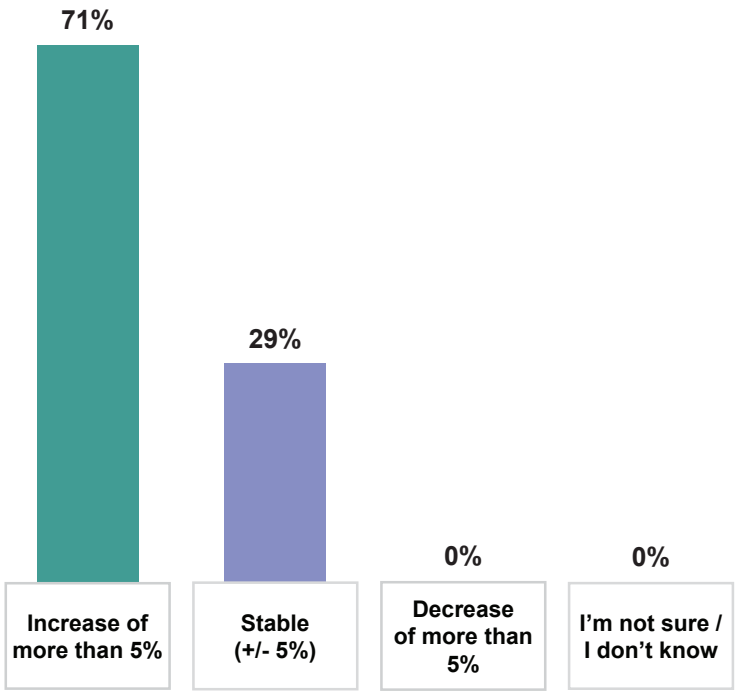



### Level of Maturity

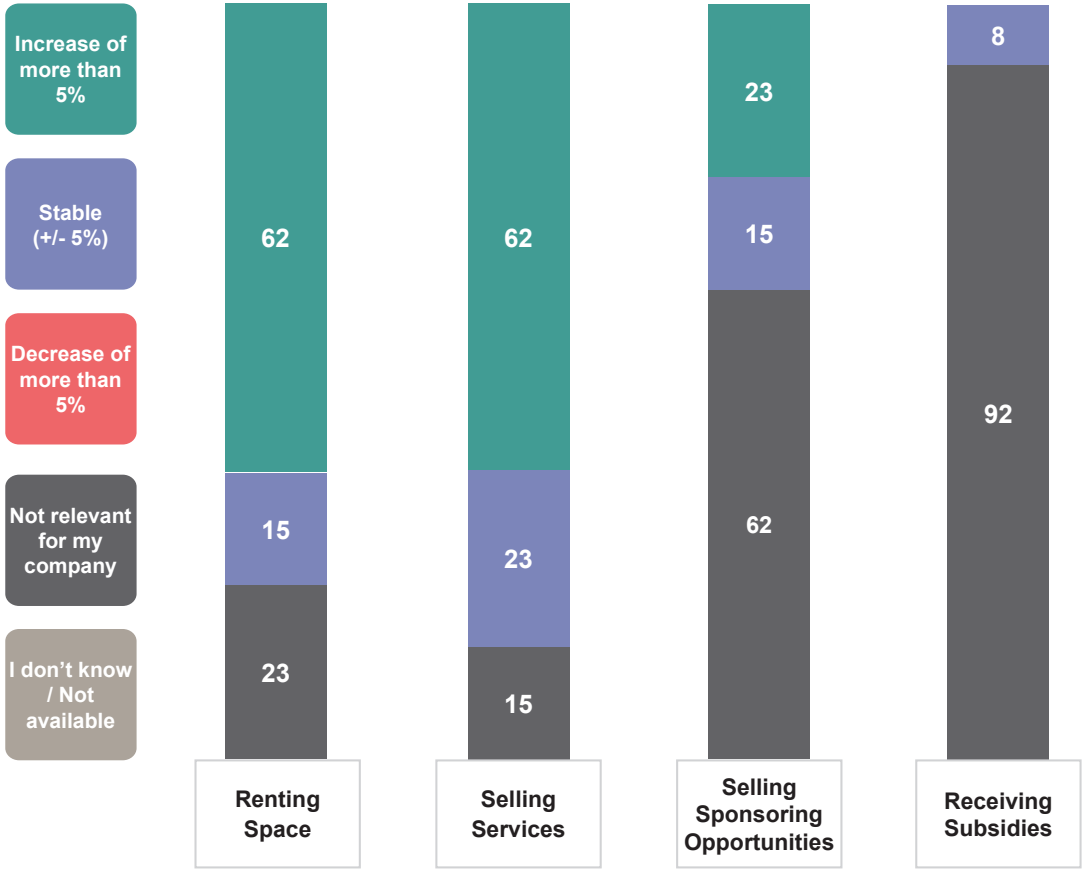
(21 answers in total)

# Detailed results for India

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

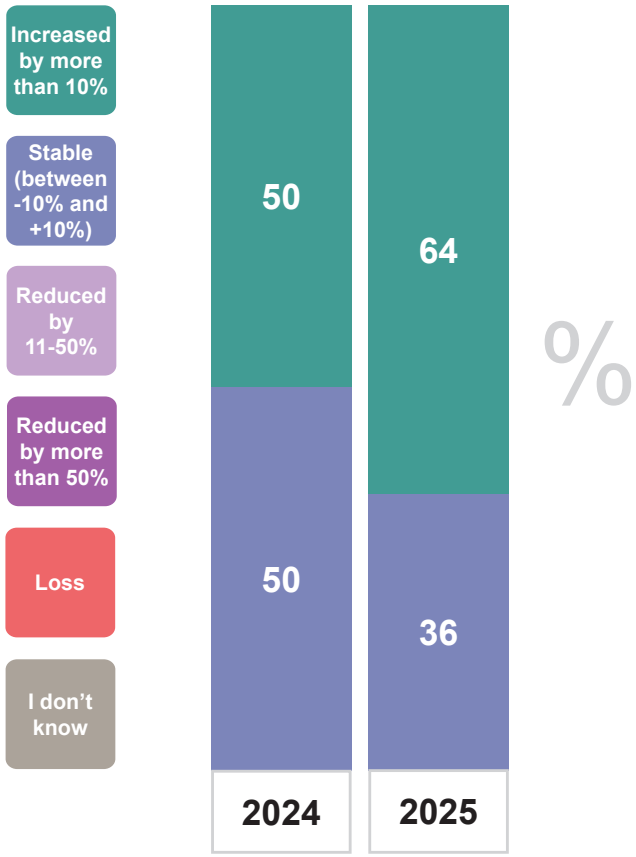




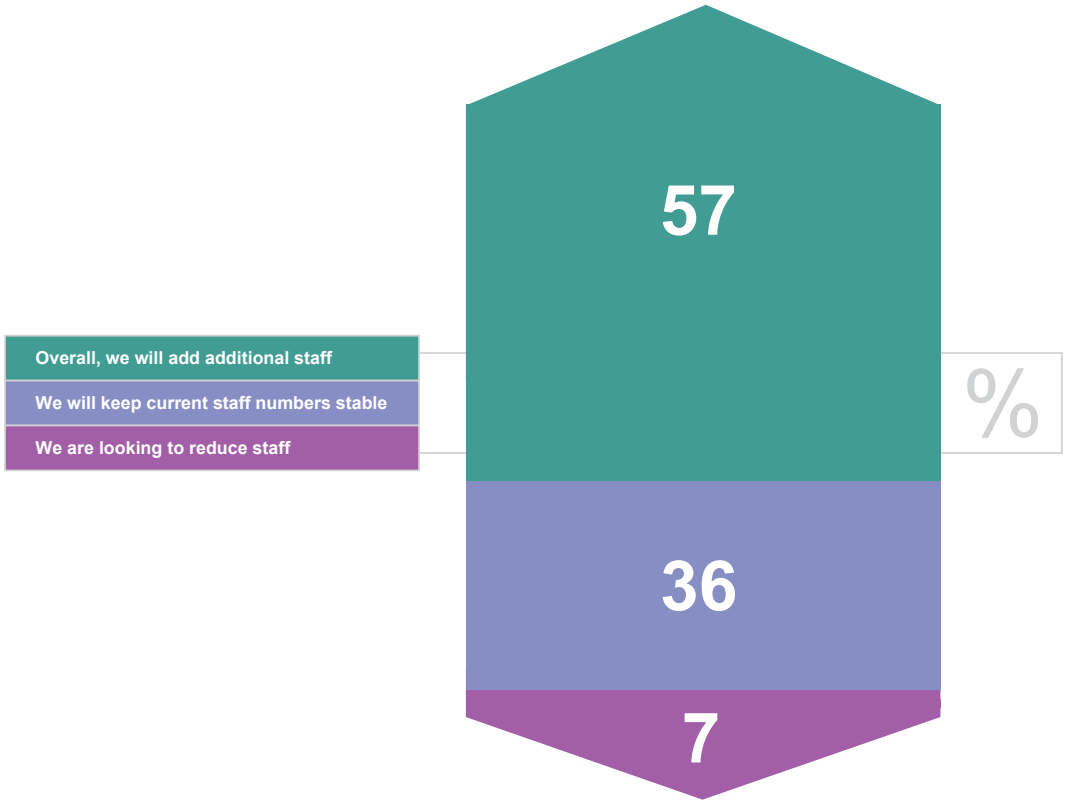

(14 answers in total)

# Detailed results for India

## Operating Profits compared to the previous year




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

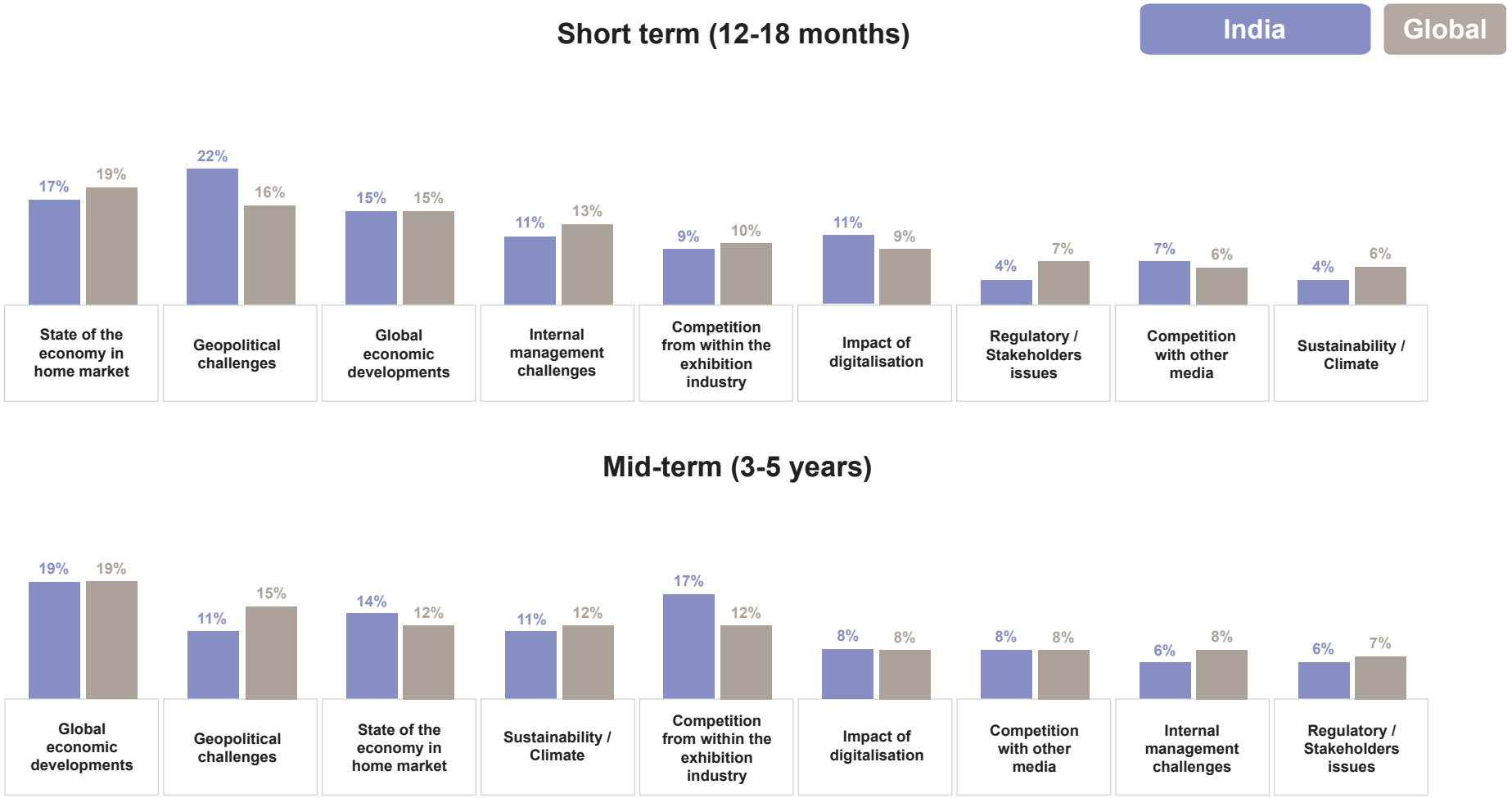





(14 answers in total)

# Detailed results for India

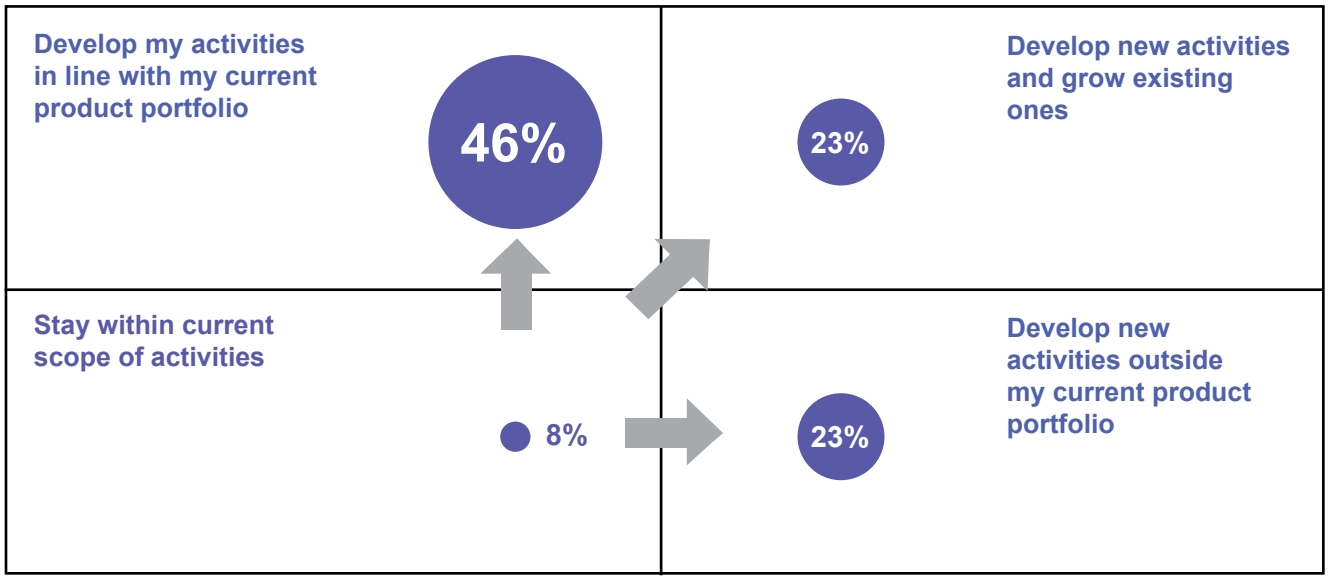
## Most important business issues in the exhibition industry right now



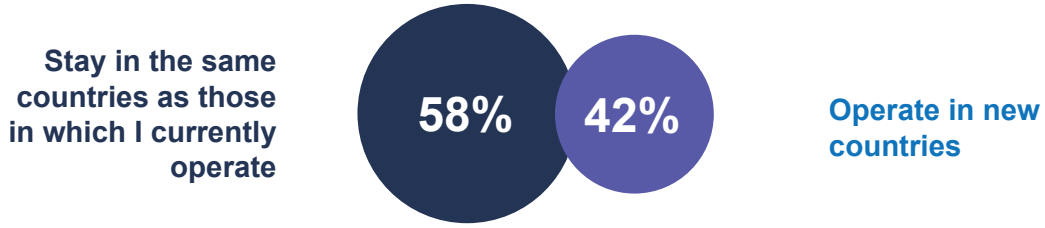
# Detailed results for India

## Current Strategic Priorities Related To:

### Range of Activities



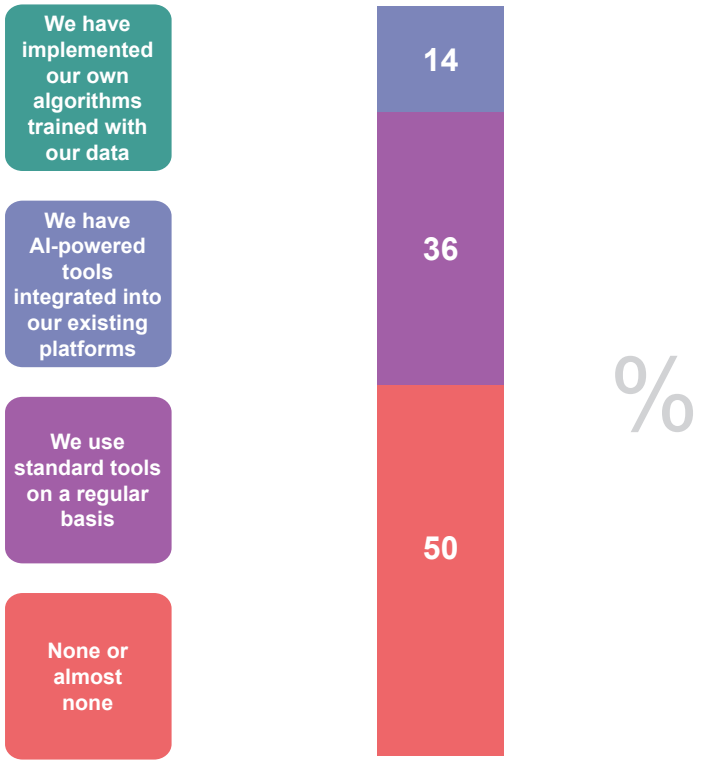

### Geographic Exposure



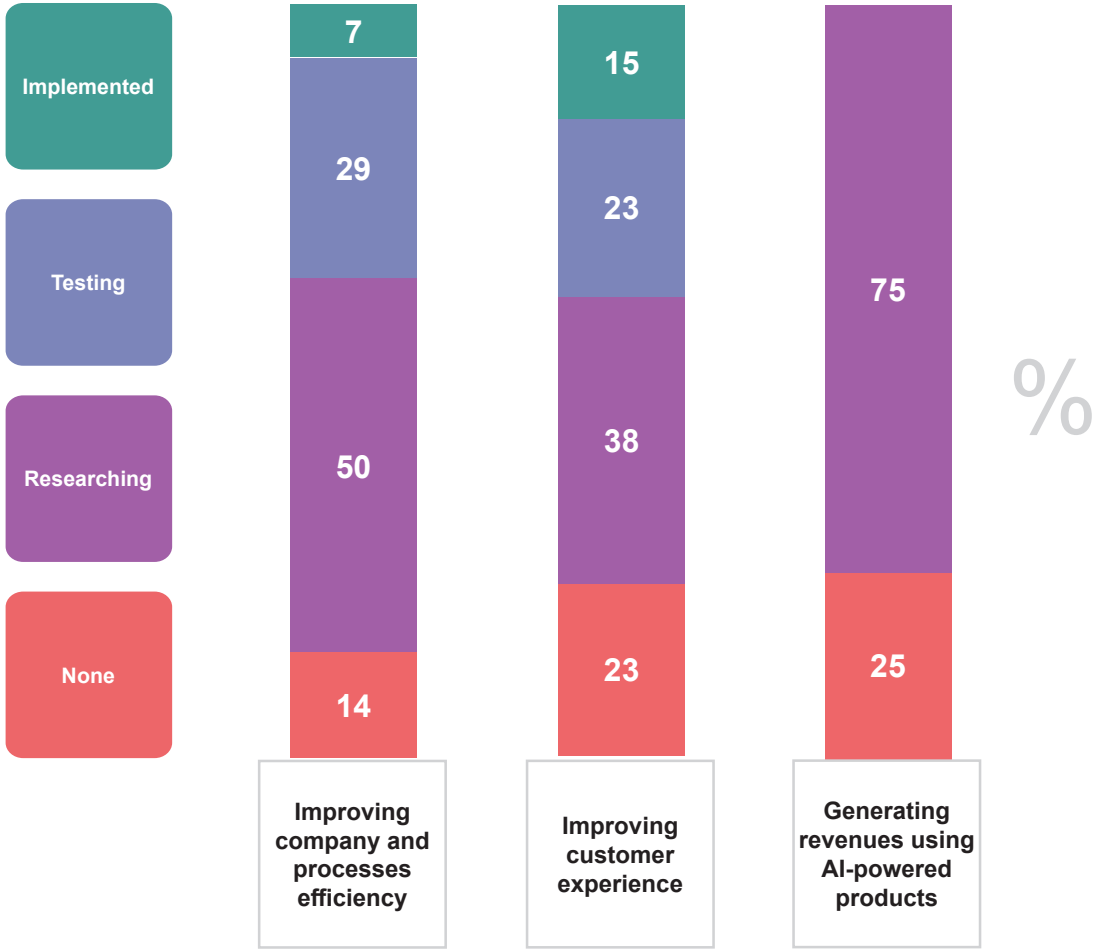
# Detailed results for India

## Generative AI Applications

### Level of Implementation




### Level of Maturity

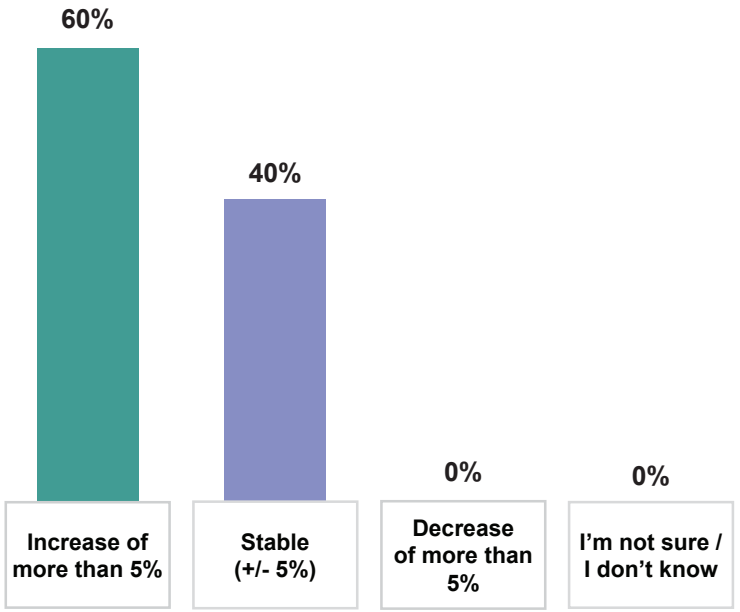





(14 answers in total)

# Detailed results for Malaysia

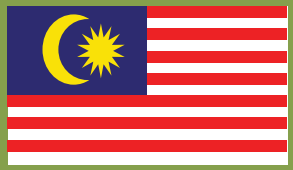
## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category

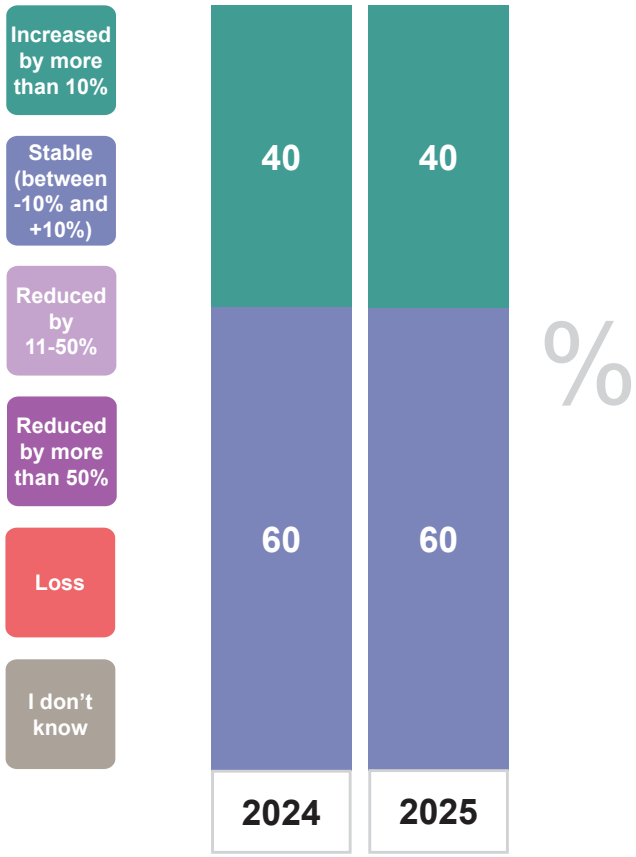
(10 answers in total)

# Detailed results for Malaysia

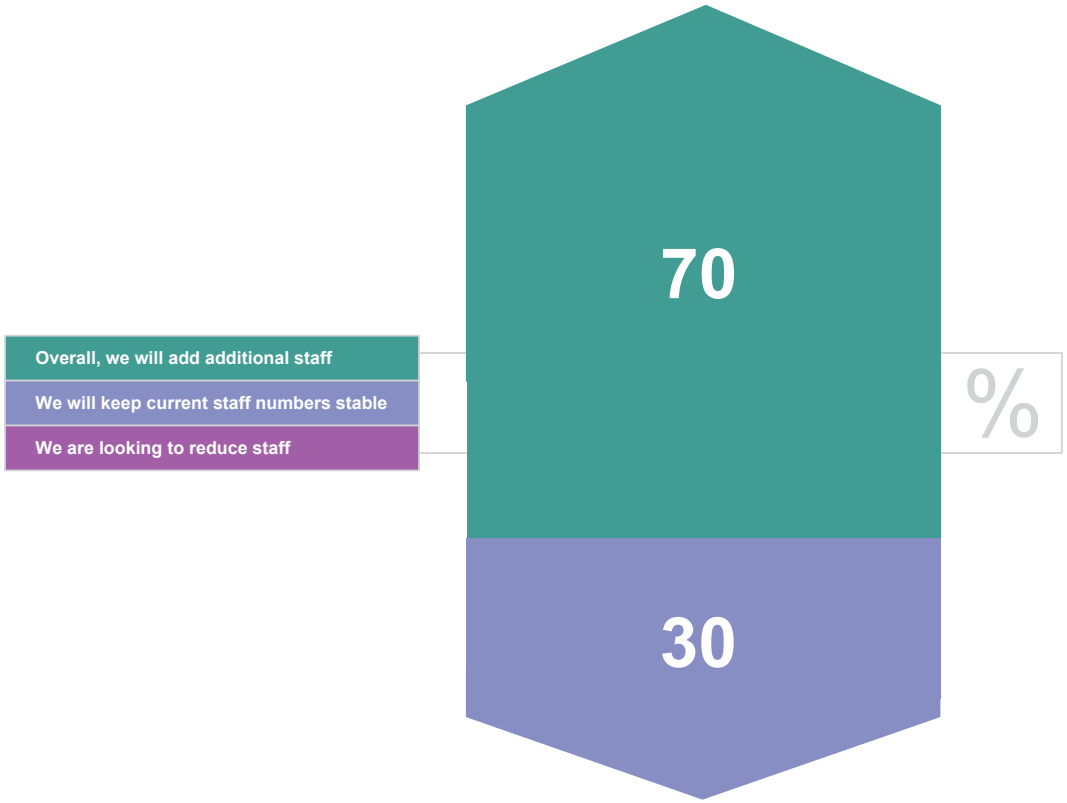


ufi The Global Association of the Exhibition Industry

## Operating Profits compared to the previous year




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

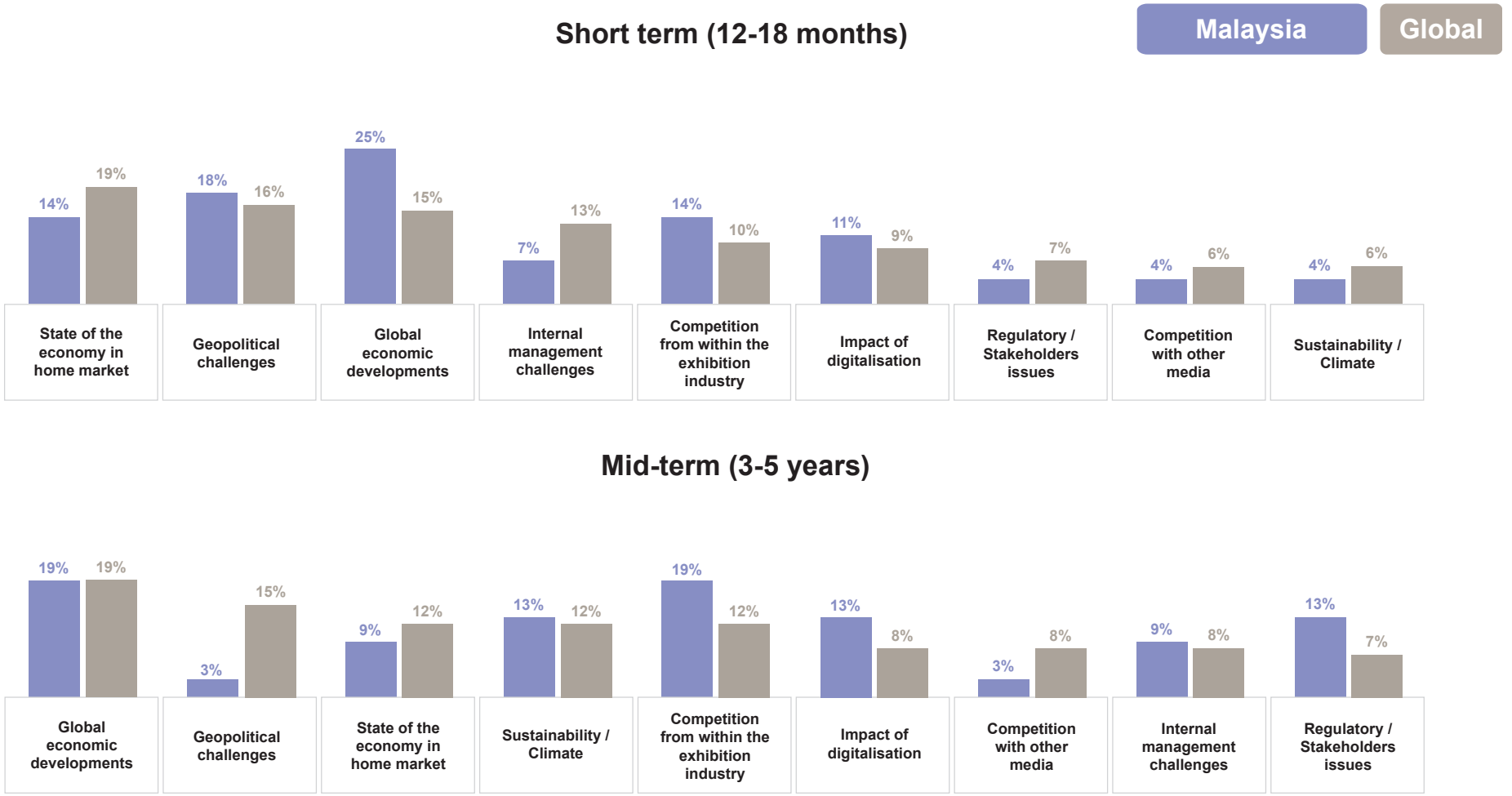





(10 answers in total)

# Detailed results for Malaysia

## Most important business issues in the exhibition industry right now



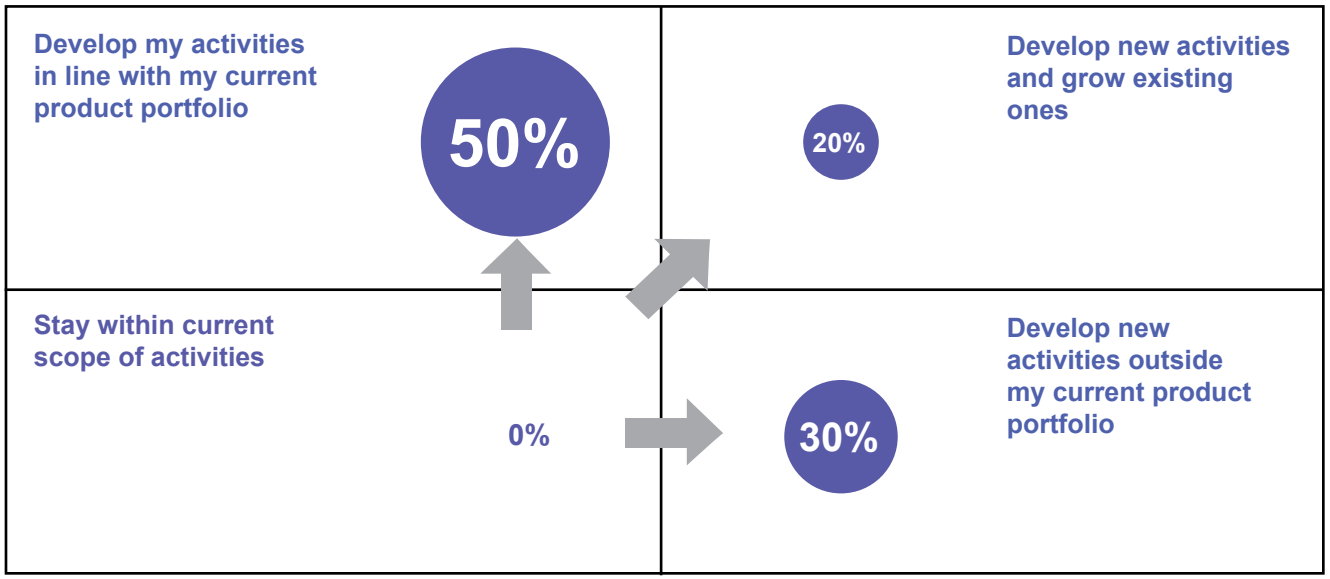



(10 answers in total)

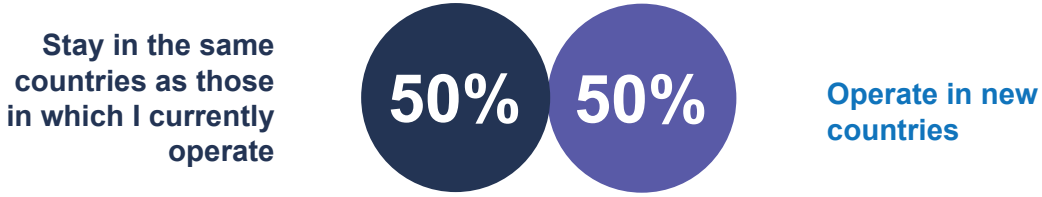
# Detailed results for Malaysia

## Current Strategic Priorities Related To:

### Range of Activities



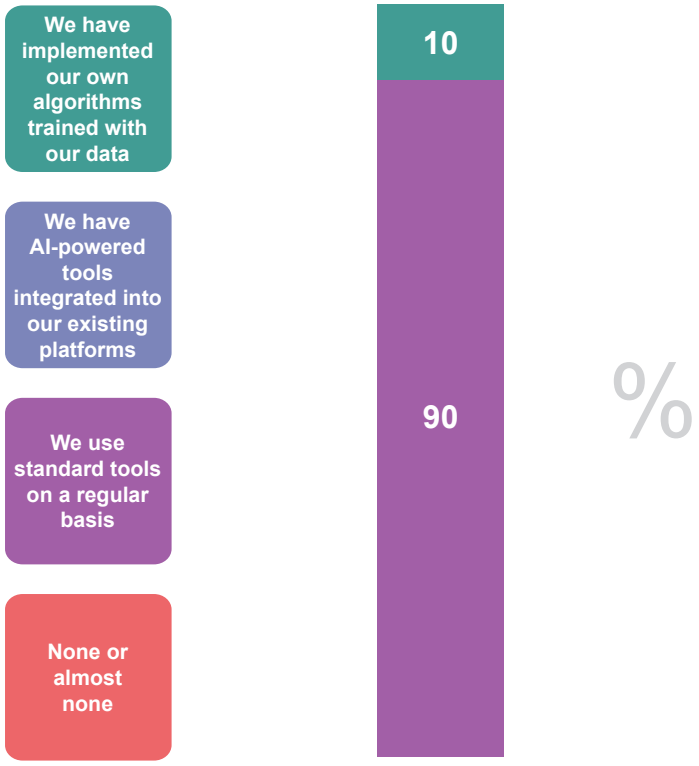

### Geographic Exposure



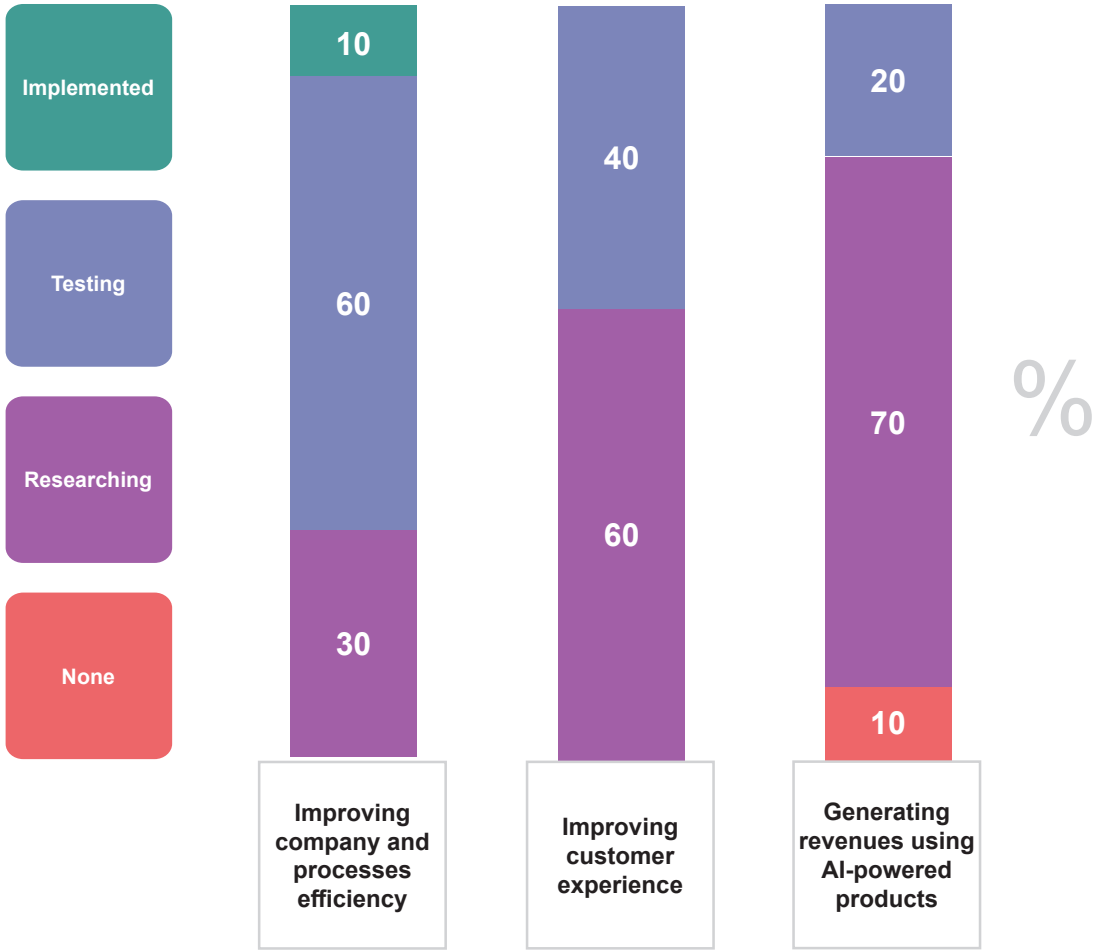
# Detailed results for Malaysia

## Generative AI Applications

### Level of Implementation




### Level of Maturity

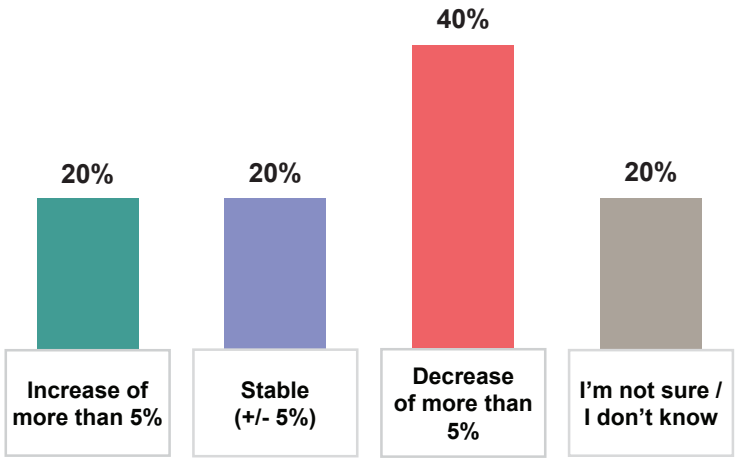




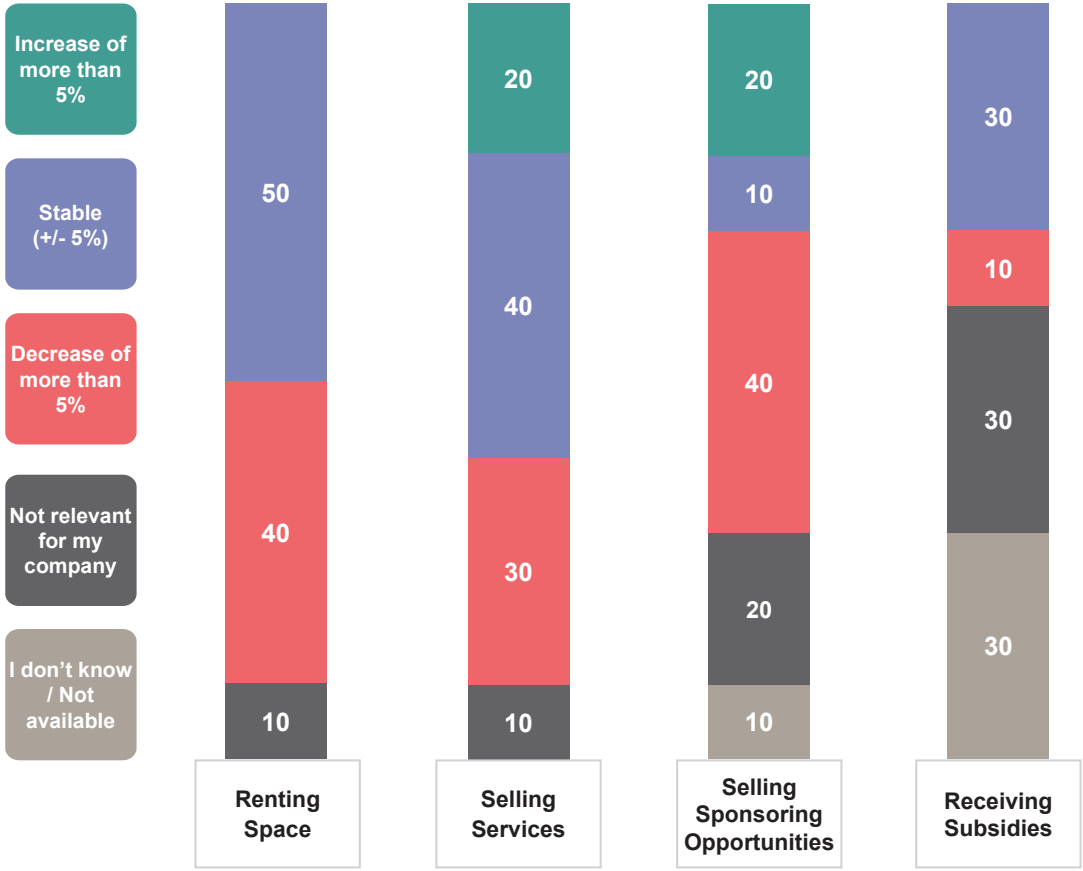

(10 answers in total)

# Detailed results for Thailand

## Rented Space
## Aggregated Country Forecast
## 2025 compared to 2024




## Company Exhibition-Related Revenues Forecast
## 2025 compared to 2024, by category



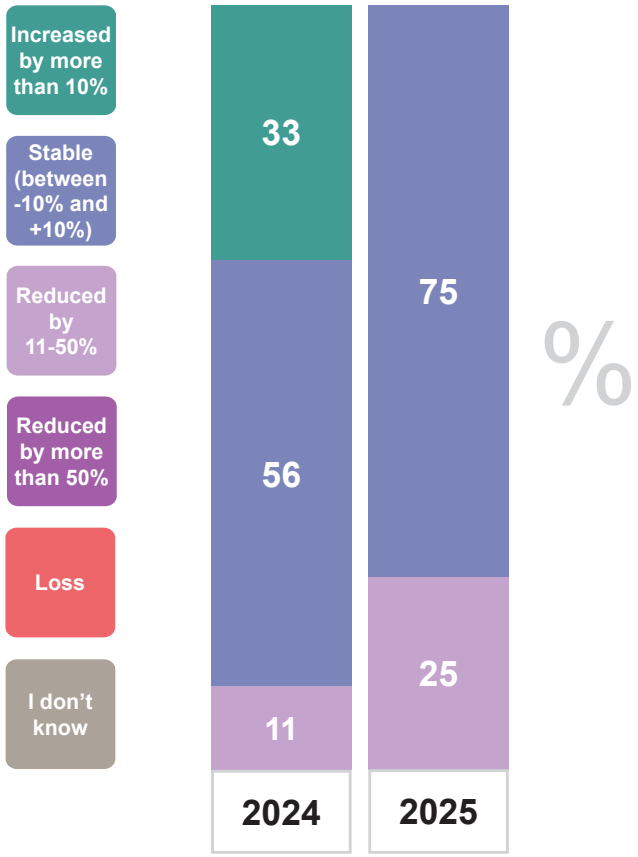



(10 answers in total)

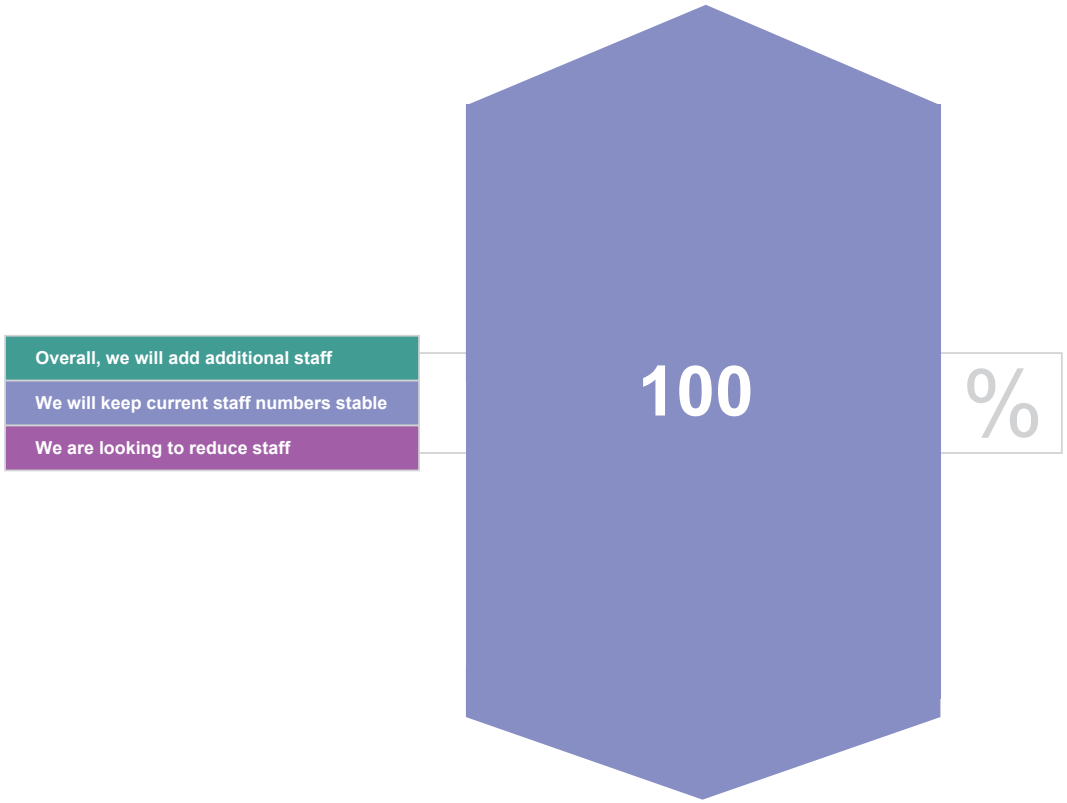
# Detailed results for Thailand

ufi The Global Association of the Exhibition Industry

## Operating Profits compared to the previous year




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

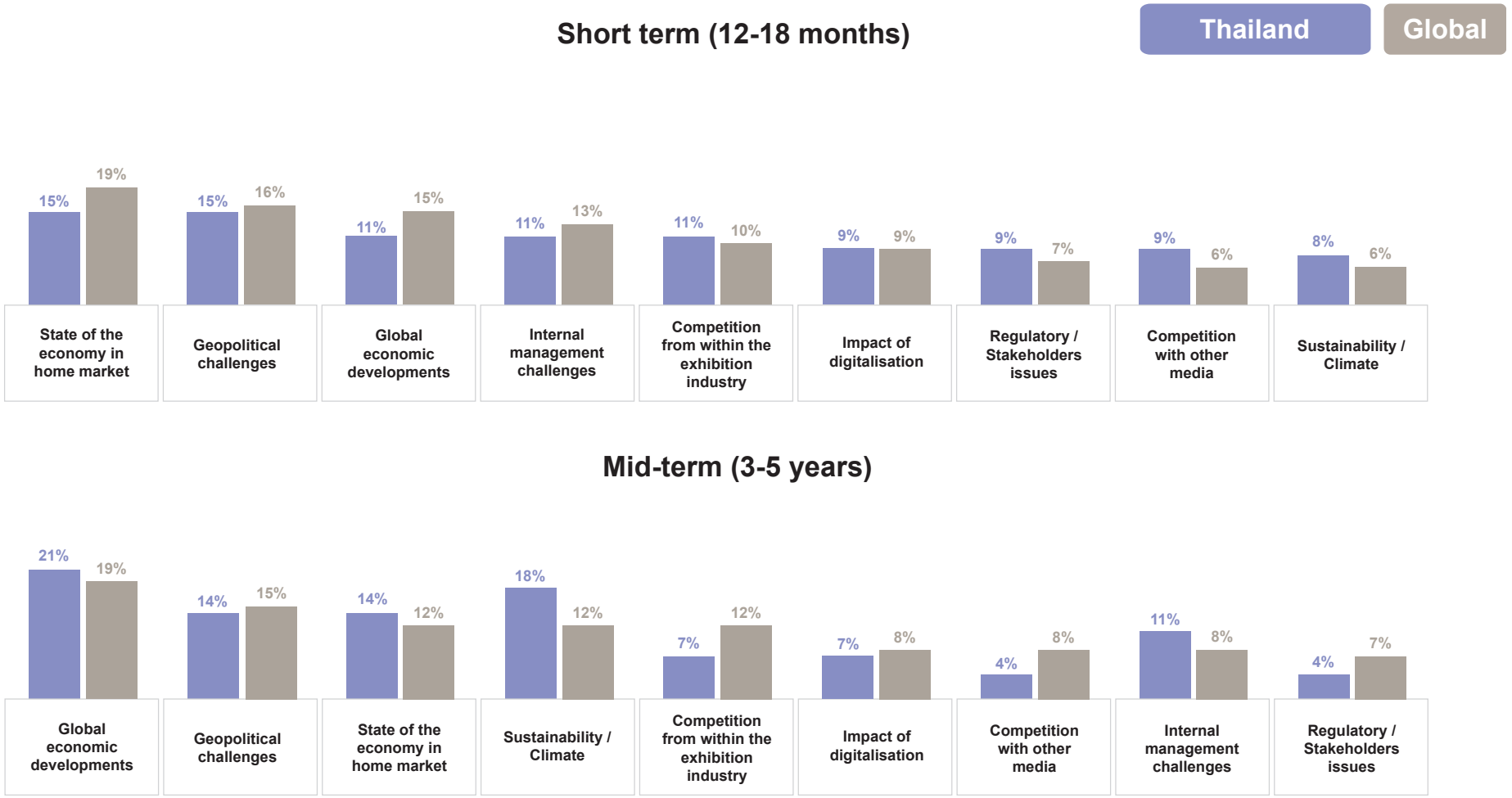





(10 answers in total)

# Detailed results for Thailand

## Most important business issues in the exhibition industry right now



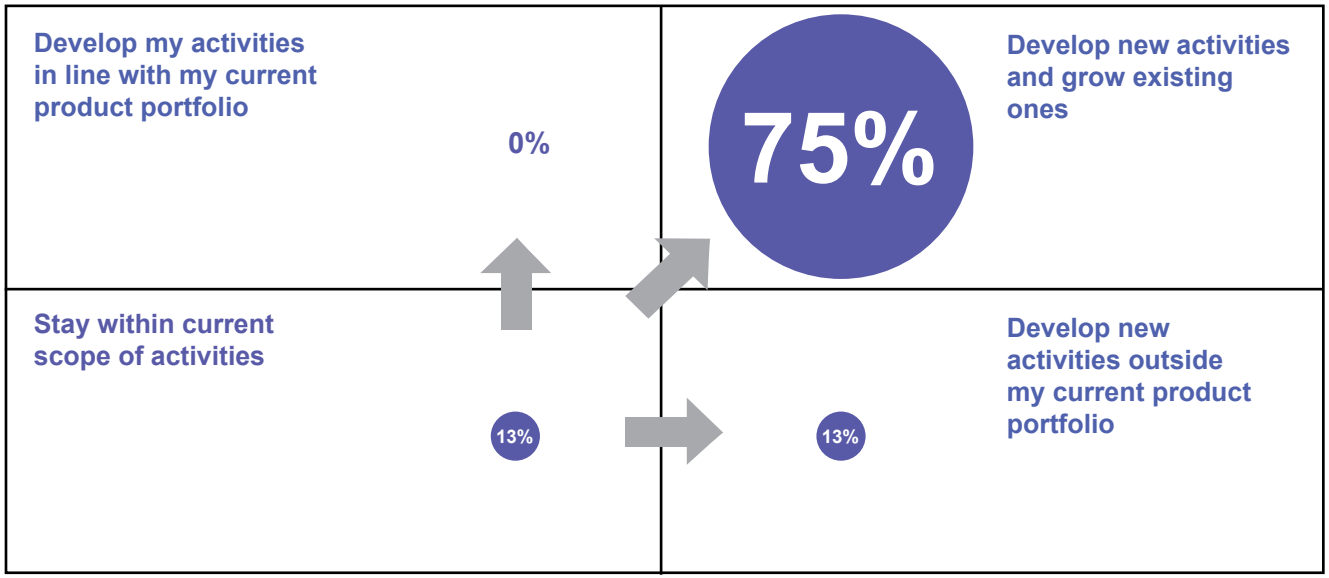



(10 answers in total)

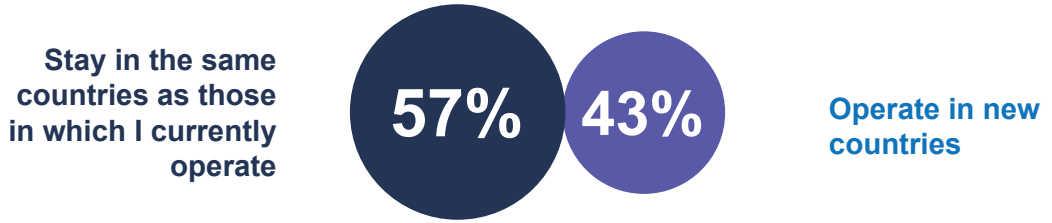
# Detailed results for Thailand

## Current Strategic Priorities Related To:

### Range of Activities




### Geographic Exposure



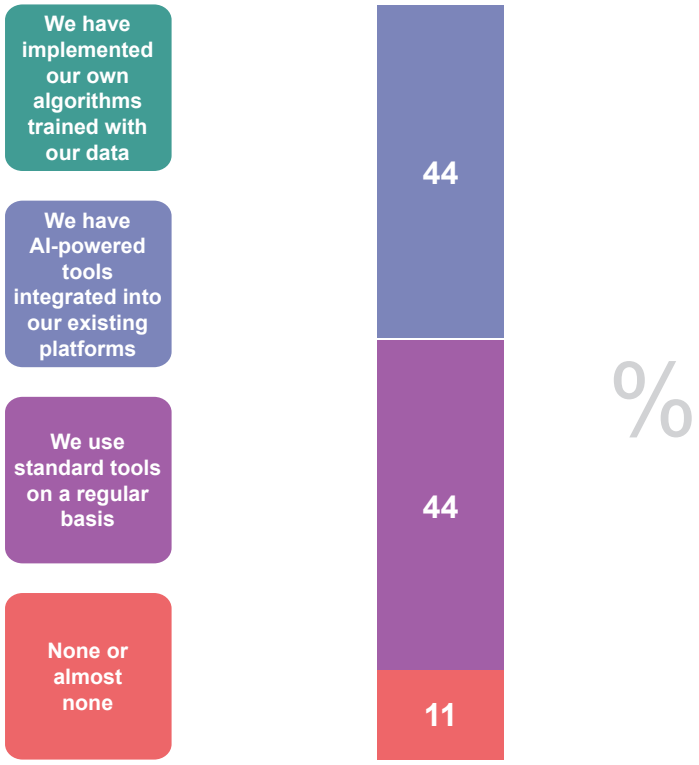



(10 answers in total)

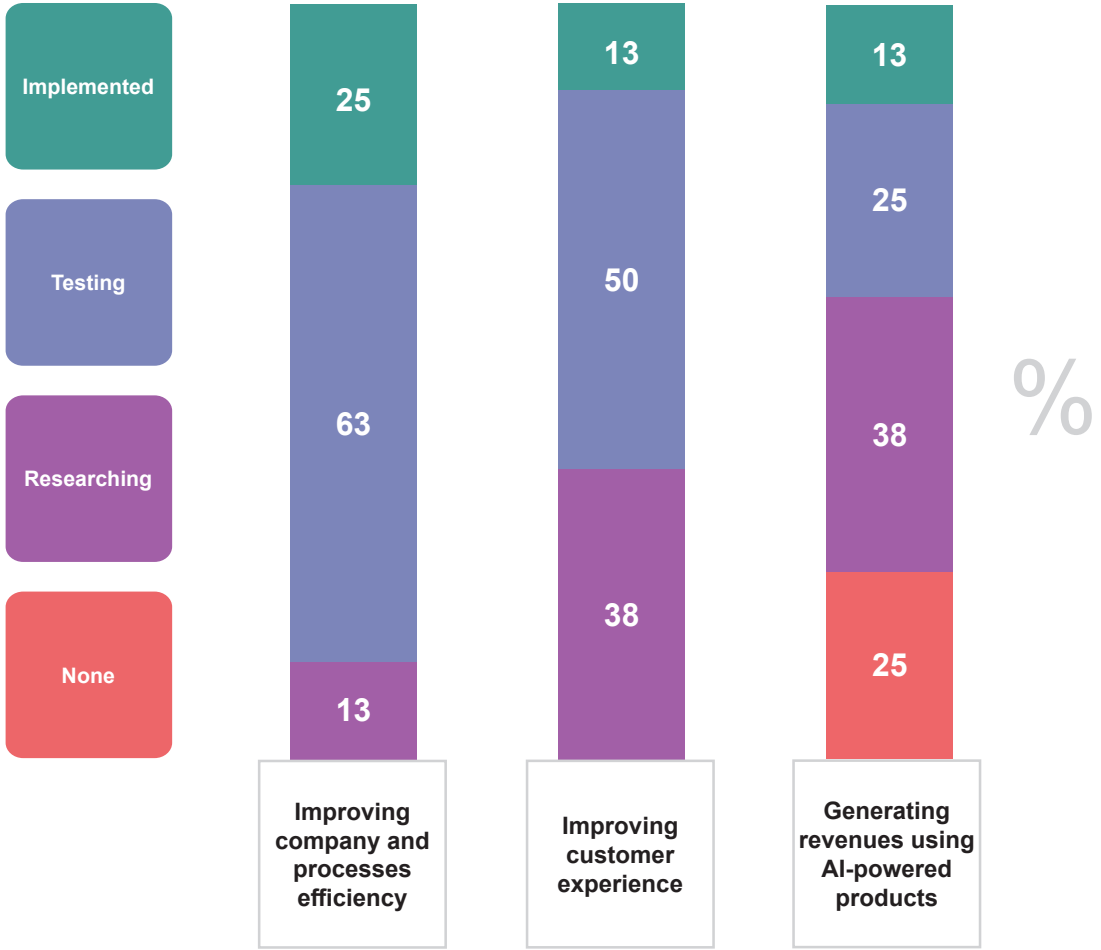
# Detailed results for Thailand

## Generative AI Applications

### Level of Implementation




### Level of Maturity






(10 answers in total)

# Conclusion

The Global Barometer survey has been constantly measuring the pulse of the exhibition industry since 2009. This 35th survey was concluded in July 2025. It includes data from 386 companies in 58 countries and regions. The report delivers outlooks and analysis for 19 focus countries and regions. In addition, it analyses 5 aggregated regional zones, and it also includes, for the first time, an analysis of replies by type of activity (organiser, venue or service provider/supplier) for all questions, when relevant.

New for the 35th Barometer, we surveyed participants' perception of **rented space** (net for organisers, gross for venues, and not considering biennial effect), for 2025 compared to 2024, **for the country where they are based.** Globally, 34% of respondents expect an increase in activity of more than 5% in their country, while 48% believe it will remain stable (+/-5%). This leaves only 12% expecting a decrease of more than 5%, and 6% are uncertain. However, detailed results highlight significant differences in most regions:

- In North America, around 6 respondents out of 10 forecast an increase of more than 5% in Mexico, while the same proportion foresees a stable situation (+/- 5%) in the US.
- In Central and South America, around 7 respondents out of 10 forecast an increase of more than 5% in Brazil, while 5 out of 10 in Argentina and 6 out of 10 in Colombia foresee a stable situation.
- In Asia/Pacific, the contrast is even wider. Out of the five markets detailed in the report, there are two where a majority of respondents foresee an increase of activity of more than 5%: India and Malaysia (for respectively 7 and 6 companies out of 10); one with a stable status forecast (Australia, 4 participants out of 10) and two where the majority of respondents plan a decrease of more than 5%: China (55%) and Thailand (40%).

The 35th Barometer asked participants for their **company's exhibition-related revenues** for 2025 compared to the previous year based on different revenue streams: "Renting space (to organiser if venue, to exhibitors if organiser)", "Selling services (to visitors and exhibitors, not including space)", "Selling sponsoring opportunities", and "Receiving subsidies". Global results indicate that most companies foresee:

- An increase of more than 5% of their revenues in 2025 compared to 2024 for "Renting space" (36% of respondents) and "Selling services" (39%).
- A stable evolution (of +/- 5%) for "Selling sponsoring opportunities" (32% of respondents, while 27% of respondents mention that this revenue stream is not relevant for their company).
- 54% of respondents do not consider "receiving subsidies" relevant to their company. When it is, most anticipate a stable evolution (+/- 5%) of this revenue stream.

The results by type of activity highlight different forecasts by revenue stream:

- For "Renting space", most organisers (49%) anticipate an increase of more than 5% while most venues or "venues and organisers" anticipate a stable trend (51% for both).
- For "Selling services", most service providers/suppliers (42%) anticipate an increase of more than 5% while most organisers, venues or "venues and organisers" anticipate a stable trend (42%, 44%, 38% respectively).
- For "Selling sponsoring opportunities", most organisers and "organisers and venues" anticipate a stable trend (respectively 39% and 48%), while this revenue channel is "not relevant" for most venues and service providers/ suppliers (respectively 55% and 73% of respondents).

For most companies across all segments, "Receiving subsidies" is not relevant. When it is relevant this revenue stream is anticipated to remain stable (+/- 5%) for most companies across all segments.

The 35th Barometer asked participants how their company's **operating profits** progressed in 2024 and 2025 compared to the preceding year. For 2024, 40% of the companies report an annual increase of more than 10%, and 51% declare a stable result (between -10% and +10%). For 2025, 30% of the companies report an annual increase of more than 10%, and 53% report a stable profit. Country results show significant differences. Results by type of activity do not show significant differences, and a majority of respondents from all segments (organiser, venue or service provider/supplier) anticipate stable profits (between -10% and +10%) for both 2024 and 2025: 50% of organisers, 48% of "venues & organisers", 53% of venues and 53% of service providers/suppliers for 2024; 53% of organisers, 56% of "venues & organisers", 63% of venues and 47% of service providers/suppliers for 2025.

# Conclusion

The 35th Barometer asked companies about their plans in terms of **workforce development** in the coming six months. Globally, 40% of companies declare that they plan to increase their staff numbers, while another 56% declare that they will keep current staff numbers stable. The highest proportion of companies planning to add staff is identified in Saudi Arabia (80%), Malaysia (70%), Spain (62%), the United Arab Emirates (58%), and India (57%). At segment level, on average, organisers and service providers/suppliers are more likely to recruit than venues:

- 43% of both organisers and service providers/suppliers plan to add additional staff, while 54% of organisers and 48% of service providers/suppliers will keep current staff numbers stable.
- 17% of venues plan to add additional staff and 83% to keep current staff numbers stable.

The 35th Barometer asked companies to select the **three most important issues for their business** in the short term (12-18 months) and mid-term (3-5 years) from a pre-defined list of ten issues. This list included “Geopolitical challenges” for a second year, while in parallel, the “Impact of COVID-19 pandemic on the business” was removed. The following pages present the results and include an analysis of the trend of answers to the short-term question, which has been asked over more than eight years (whereas the mid-term one is more recent).

For the short term:

- The most pressing business issue remains “State of the economy in home market” (19% of answers globally, against 23% six months ago), and it is the main issue in all regions, except the Middle East and Africa, where it ranks second.
- “Geopolitical challenges” (16% of answers, same as six months ago, and the top issue with 18% of answers for the Middle East and Africa) and “Global economic developments” (15%, same as six months ago) come in as the second and third most important issues globally.
- “Internal management challenges” (13%), “Competition from within the exhibition industry” (10%), followed by “Impact of digitalisation”, “Regulatory / Stakeholders issues” (respectively 9% and 7%, both +2% compared to 6 months ago), “Competition with other media” and “Sustainability / Climate” (both 6%) follow.

The analysis of the top 5 global issues by industry segment (organiser, venue and service provider/supplier) shows no differences for the top 2 issues, but the order of the other 3 varies.

The analysis of the trends around top business issues over the 2016 - 2025 period, when combining the previous list into six categories, shows the same positions as six and twelve months ago for the top 2, but changes after:

- “Global economic developments” and “State of the economy in the home market” combined is the main issue, with an aggregated 34% of answers (-4% when compared to six months ago).
- “Geopolitical challenges” remains second, with 16% of answers (same as six months ago)
- “Impact of digitalisation” and “Competition with other media” combined now ranks 3rd, with 15% of answers (+4% compared to six months ago).
- “Internal management challenges” now ranks 4th, with 13% of answers (+1%)
- “Sustainability / Climate” combined with “Other stakeholders’ issues” and “Competition from within the exhibition industry” follow, with 12% and 10% of answers, respectively.

There are many differences in ranking when comparing the most important issues in the short term versus mid-term:

- The top three issues remain the same, but the first and third have swapped places: “Global economic developments” now is the top mid-term issue with 19% of answers (compared to the short-term issues, where it ranks third with 15%), followed by “Geopolitical challenges” with 15% of answers (compared to 16% for the short term) and “State of the economy in the home market” is third with 12% of answers (compared to the short-term issues, where it ranks first with 19%).
- “Sustainability / Climate” comes to the fourth position for the mid-term (with almost the same level of 12% as the third one), compared to the ninth position on the short term (with only 6% of answers).
- “Competition from within the exhibition industry” (12% of answers), “Impact of digitalisation”, “Competition with other media” and “Internal management challenges” follow (all with 8%), and then “Regulatory stakeholders’ issues” (7%).

# Conclusion

- The analysis of the top 5 global issues by industry segment (organiser, venue and service provider/supplier) shows differences:
- Organisers and venues share the same top 2 issues: “Global economic developments” (20% of answers for organisers and 22% for venues) and “Geopolitical challenges” (16% of answers for organisers and 15% for venues).
- But “Sustainability/Climate” is the top priority for “Service providers/suppliers” (15% of answers), followed by “Geopolitical challenges” (13% of answers).

Companies were asked to share their **current strategic priorities** in two specific areas: their range of activities and their geographical exposure. In all regions, a large majority of companies intend to develop new activities, either in the classic range of exhibition industry activities (venue/organiser/services), outside of the current product portfolios, or in both areas: 78% in Europe, 79% for both Asia-Pacific and the Middle East & Africa, 83% in Central and South America, and 84% in North America. The analysis by industry segment (organiser, venue and service provider/supplier) shows that:

- Organisers are the ones who primarily plan to develop their activities in line with their current product portfolio (40% of their answers) or consider both developments, also including new activities outside their current product portfolio (22%).
- Service providers/suppliers are the ones who primarily plan to develop new activities outside their current product portfolio (36%).

In terms of geographic expansion, half of companies report an intention to develop operations in new countries and regions. Half of organisers (51%) report this, while it is higher for service providers/suppliers (62%) and lower for venues (19%).

The 35th Barometer asked participants to assess their **current level of AI implementation** based on the following answer options: “None or almost none”, “We use standard tools (ChatGPT, Google Gemini, Microsoft Copilot, Midjourney, etc.) on a regular basis”, “We have AI-powered tools integrated into our existing platforms” or “We have implemented our own algorithms trained with our data”. It also asked for their **level of maturity in using AI powered products** to improve company and process efficiency, improving customer experience, and generating revenue (“None”, “Researching”, “Testing” or “Implemented”).

Globally, 63% of companies indicate that they currently use standard AI tools (such as ChatGPT, Google Gemini, or similar) in at least some of their business functions. In addition, 17% have AI-powered tools integrated into their existing systems, and 3% have already developed proprietary algorithms trained on internal data. In parallel, 17% of respondents declare having no or almost no use of AI at this stage.

At segment level, on average, organisers appear more advanced than service providers/suppliers or venues: 12% of organisers, 21% of service providers/suppliers and 34% of venues declare a low or non-existent level of implementation; 24% of organisers, 19% of service providers/suppliers and 17% of venues declare already reaching either implementation of their own algorithms trained with company data or AI-powered tools integrated into their platforms.

In terms of their level of maturity, most companies are still researching or testing solutions in the 3 domains surveyed: 72% towards “improving company and process efficiency”; 68% towards “improving customer experience”; 54% towards “generating revenues using AI-powered products”. At segment level, the proportion of companies declaring either testing or implementing AI solutions is:

- 61% for service providers/suppliers, 56% for organisers, and 30% for venues towards “improving company and process efficiency”.
- 58% for organisers, 37% for service providers/suppliers and 21% for venues towards “improving customer experience”.
- 28% for organisers, 19% for service providers/suppliers and 0% for venues towards “generating revenues using AI-powered products”.

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

# Appendix: Number of survey replies per country
# Total = 386 (in 58 countries/regions)

| North America | 53 |
|---|---|
| Canada | 1 |
| Mexico | 38 |
| USA | 14 |

| Central & South America | 53 |
|---|---|
| Argentina | 13 |
| Bolivia | 1 |
| Brazil | 15 |
| Chile | 2 |
| Colombia | 13 |
| Costa Rica | 2 |
| Ecuador | 1 |
| El salvador | 1 |
| Panama | 3 |
| Peru | 1 |
| Uruguay | 1 |

| Europe | 137 |
|---|---|
| Albania | 1 |
| Belgium | 4 |
| Croatia | 1 |
| Estonia | 1 |
| France | 10 |
| Germany | 19 |
| Greece | 15 |
| Ireland | 1 |
| Italy | 28 |
| Netherlands | 3 |
| Poland | 1 |
| Portugal | 2 |
| Romania | 1 |
| Russian Federation | 1 |
| Slovenia | 3 |
| Spain | 14 |
| Sweden | 3 |
| Switzerland | 1 |
| Türkiye | 6 |
| United Kingdom | 22 |

| Middle East & Africa | 53 |
|---|---|
| Bahrain | 1 |
| Egypt | 3 |
| Kenya | 1 |
| Lebanon | 1 |
| Morocco | 1 |
| Oman | 1 |
| Qatar | 3 |
| Saudi Arabia | 10 |
| South Africa | 18 |
| Syria | 1 |
| Tanzania | 1 |
| United Arab Emirates | 12 |

| Asia-Pacific | 90 |
|---|---|
| Australia | 16 |
| Azerbaijan | 1 |
| China | 21 |
| Hong Kong | 4 |
| India | 14 |
| Japan | 4 |
| Macau | 3 |
| Malaysia | 10 |
| Singapore | 1 |
| South Korea | 5 |
| Thailand | 10 |
| Vietnam | 1 |

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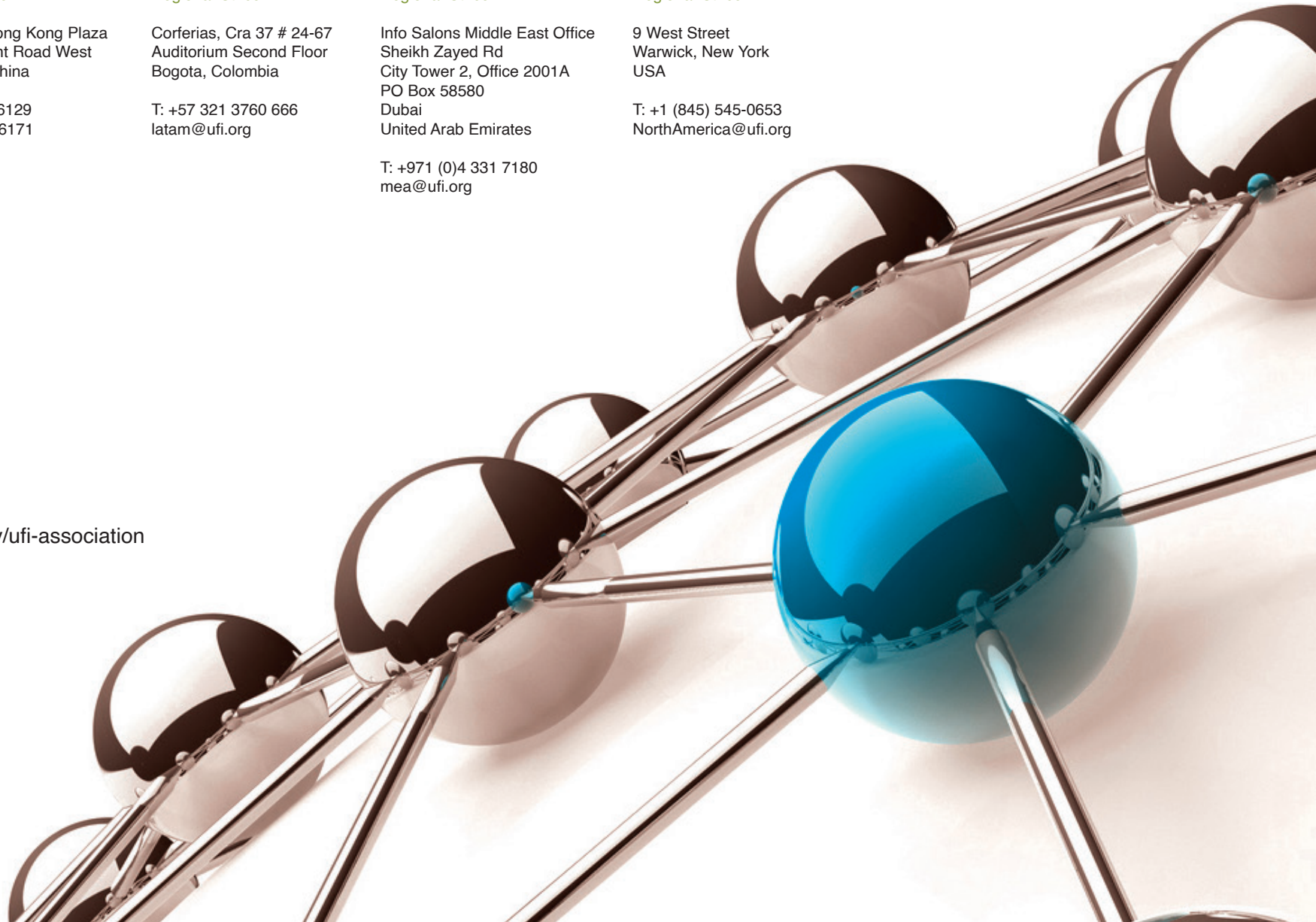
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