



AUMA-Trends 2023/2024

The German Trade Fair Industry:
Using post-crisis momentum to drive change



Trade Fairs in Germany – The world's number one spot

Home of the trade fair and a magnet for the world: Today, there are more than 70 trade fair locations from Husum on the North Sea, down to Friedrichshafen on Lake Constance and from Leipzig in the east over to Essen in the west. Here is where a large number of the world's industry trade fairs take place.



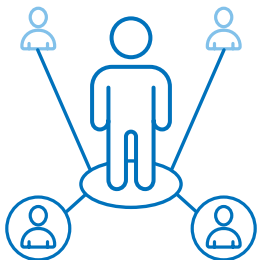
16 m.
visitors per year

Two thirds of the world's leading fairs take place in Germany.

- Each year, between 160 and 180 international and national trade fairs take place in Germany.
- The fairs attract more than 180,000 exhibitors and ten million visitors.
- 60 percent of exhibitors and 35 percent of visitors come from outside of Germany.
- 40 percent of foreign exhibitors and a quarter of foreign visitors come from overseas.

The meeting place for mid-sized companies

- Around 58,000 German companies are active as exhibitors in the B2B segment. 52 percent of these belong to the manufacturing sector, followed by services (24 percent) and trade (20 percent).
- 87 percent of the exhibitors are mid-sized companies.
- Mid-sized companies have access to almost 70 exhibition venues within arm's reach, connecting them with the national and international markets.



380
trade fairs per year

A dense network of regional trade visitors and public fairs.

- The regional events bring together 55,000 exhibitors and around six million visitors.
- Put together, the mix of international, national and regional events make up around 350 to 380 trade fairs per year.

World-class exhibition venues.

- Four out of ten of the world's largest exhibition grounds are located in Germany: Hannover, Frankfurt am Main, Cologne and Düsseldorf.
- There are over 40 million square metres of exhibition hall space worldwide, over three million of which are in Germany.
- Some of the German trade fair organisers are among the top 10 in the international sales ranking.

High importance in Germany's national economy

- The trade fair industry contributes to the overall economic growth with around 28 billion euros per year.
- The organisation of trade fairs alone secures 230,000 jobs.
- The fair-induced tax revenues for an average trade fair year are around 4.5 billion euros.

All key figures are from 2019, the last full trade fair year before the coronavirus pandemic has started



Facts and figures



● Trade fair venues with at least one international or national trade fair (AUMA)

● Further regional trade fair venues: <https://fama.de/>

▶ All trade fair organisers with AUMA membership: <https://www.auma.de/en/auma/membership-spectrum>



Eight current trends in the German trade fair industry



The German trade fair industry is changing: There won't be a single 2024 trade fair that resembles those of 2014. Change has always been a constant contributor to the industry.

The AUMA team intensively observes the German and international trade fair landscape by meeting with exhibitors, visitors and organisers from the event side of things, as well as political decision makers and the media. We have condensed down eight of the key findings from our surveys, observations and discussions.

Jörn Holtmeier, Managing Director,
Association of the German Trade Fair Industry AUMA

1

Digitalisation ...

... is not an 'either-or' to analogue presence, but a well-considered combination of the best elements from both worlds. For example, virtual reality allows services to be visually experienced. Digital touchpoints are well integrated into the customer journey. Real trade fair displays are perfectly complemented by clever digital solutions, expansions and enhancements. This starts well before the on-site trade fair and leads right the way through to the follow-up stage. Digital extensions also enable distanced participations, in the event of something getting in the way of participation. Digital attendance on its own, did not work.

2

More dynamic than ever ...

... as decisions are being made to both exhibit and attend trade fairs again. Short-term decisions are on the rise. And with it, brings challenges. Greater flexibility in the services offered, as well as planning are essential factors. Customers are responding quicker and expecting more flexibility than before. However, there still hasn't been a rise in summer dates for trade fairs, as demonstrated in

2022, due to the great need to catch up. Almost all 2024 trade fair dates will return to their long-established dates, which sit outside the big holiday periods.

Globally 3

... Germany is the number 1 trade fair country, but competition is increasing worldwide. Seoul, Dubai and Barcelona - to name just three examples - have realised the economic boost that trade fairs offer to the economy. Politicians at federal and state levels are well advised to value their domestic trade fair industry. For example, for a trading nation like Germany, it is essential that visas are issued quickly for foreign trade participants who want to either exhibit or visit the German fairs. This has been a huge problem since the trade fair businesses started up again in Spring 2022. The promotion of trade fairs for small and medium-sized enterprises (SMEs) is also a demonstrably well-spent investment in Germany's prosperity. Countries in Asia are increasingly providing powerful support, while in Germany, the trade fair funding for 2023 has been cut down to an all-time low.



4 Customer focus ...

... customer focus, customer focus. It cannot be said often enough! Trade fairs are, and will remain, the marketplaces and the leading events for their industries. Yet, the trade fair experience of the guests is more important than ever. Visitors, as well as exhibiting companies, take centre stage in the planning and execution of these events. They expect the highest quality of service. Trade fairs are particularly powerful in the marketing mix where exhibitors and visitors can focus on making new valuable contacts for their business, their interests and their ideas.

5 Sustainability ...

... is increasingly becoming a decision criterion for visiting and exhibiting at trade fairs. Above all, ecological sustainability plays a decisive role in Germany as a trade fair location. Businesses are increasingly making their trade fair appearances more sustainable, and locations are investing more and more in sustainability - 550 million euros by 2027. The German trade fair industry will continuously reduce its own ecological footprint in order to remain an attractive hub for the problem solvers of the future. Targets have been set since Summer 2022 with the industry's own sustainability strategy.

One thing is for sure. The future is coming - with more and more digital touchpoints at trade fairs.

6 Presence

... remains unbeatable, in-person meetings have a whole new relevance. The pandemic showed us this - not only at trade fair locations in Germany but also abroad. Business is best done in person, where strong, trusting partnerships can be started through real-life meetups. It allows you to address all five senses. Trade fair guests want to touch, test, taste, try and listen for themselves to make up their own mind. It's not possible to tingle all senses in the digital space.

7 Talents

... must be won. The quality, determination and inventiveness of new employees will determine the position of companies in the market. That's why companies are no longer just using trade fairs for product presentation, but they are increasingly incorporating them into their HR strategies. However, this doesn't just affect the exhibiting companies, but also the trade fair organisers and service providers themselves, who have to implement every change, rethink social issues and react to trends more quickly. The competition is getting hot(ter). Bright minds and their ideas determine the success of the company.

8 Upheavals

... in economic development are manifesting at the corresponding trade fairs. Trade fairs are and will remain a mirror of their industries. If energy prices rise, the demand for energy-saving technologies increases. If there are new topics and areas of interest, new concepts will be developed. There are almost 20 new trade fairs for Germany's 2023 trade fair season, just as many as there were in the previous year. The trade fair industry remains fully dynamic and offers targeted trading venues whenever a new market is created. Trade fairs are and will remain the showcases of innovations, even in times of upheaval and uncertainty.





Using post-crisis momentum to drive change

Hendrik Hochheim, Head of Trade Fairs Germany, Association of the German Trade Fair Industry AUMA

There are so many new topics in business and society, including controversial ones, and therefore there is an urgent need for exchange, platforms where people can explain and discuss. Trade fairs provide this type of important opportunity to meet. They are essential in driving change forward.



© AUMA / Steffen Kögler

2023 is the first year with a complete trade fair programme since the start of the Corona pandemic.

2024 will allow the previously postponed fairs to return to a familiar rhythm. It will be more visible than ever how the exhibitors and their customers are facing up to the rapid changes and new challenges: Artificial intelligence and virtual reality do not just stir public debate, but they can also influence physical trade fair appearances. New technical possibilities are becoming more and more dense. Exhibiting and organising companies need to know better how customer needs are changing. This knowledge has to be used to shape their target group concepts, through the reasonable use of new tools and technologies. Dealing with this whilst simultaneously handling the challenges of staff shortages will certainly challenge companies and, at the same time, will determine their position in the market. Those companies who are committed to sustainability and have awareness in their social responsibility are becoming more attractive and moving with the modern times.

2023 will be the first year with a complete trade fair calendar since the beginning of the coronavirus pandemic. A minimum of 340 events will take place across all four quarters of the year. These include many international industry fairs that have been paused for several years due to the pandemic. The trade fair industry is recovering. Both national and international trade fair participants are returning to Germany as a trade fair location. 2023 will be a year of recovery, and although

the pre-pandemic figures have not yet been reached, there is a positive upward trend overall. International business travel is back to normal again. The approach especially from Asia is increasing. The overall economic uncertainties and the global political shifts are doubtful, but trade fair participations are a convincing part of the marketing model.

2022 was the third exceptional year in a row. While the first quarter was almost completely cancelled due to trade fair bans, the majority of the trade fair participants had returned by autumn at the latest. 280 trade fairs took place, including 60 with first time, and unique summer dates. In 2022, a total of 130 trade fairs were cancelled. Over 7.6 million visitors and more than 141,000 exhibitors attended the German trade fairs. That's 70 percent of exhibitors and 65 percent of visitors of the pre-pandemic figures.

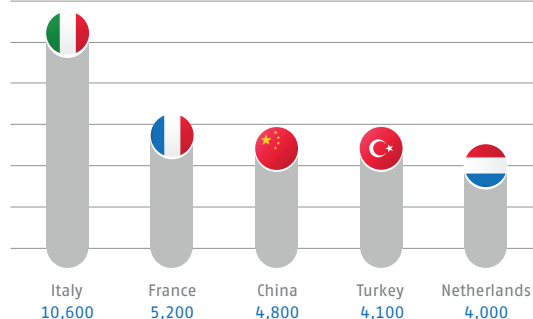
However, a good two dozen new trade fairs celebrated their premiere in 2022, predominantly in the mobility, medicine and energy industries. Only one trade fair took place completely digitally. Around 5.7 million square metres of stand space was booked at the trade fairs between Husum and Friedrichshafen. Five million square metres of those were at the almost 170 trade fairs of national and international importance. These were the specific meeting locations for around 5.5 million of the 7.6 million visitors and 120,000 of the more than 141,000 exhibitors.

The two million foreign trade fair visitors in Germany in 2022 were impressive. Proportionally, the approximately 72,000 foreign exhibitors were at pre-pandemic level. An interesting fact is to see where they came from. There was a clear shift there: In 2019, almost



Trade Fairs in Germany 2022

The five most important exhibiting countries



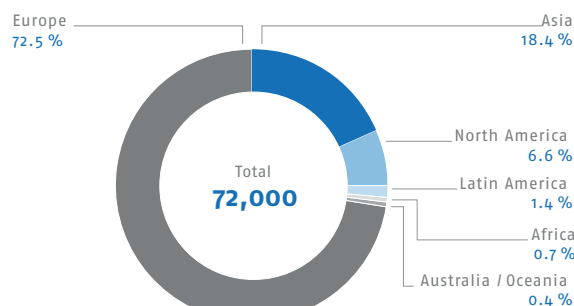
Exhibitor numbers rounded

© AUMA

Trade Fairs in Germany 2022

Foreign exhibitors

AUMA category international and national events



© AUMA

30 percent of exhibiting companies came from Asia, but in 2022 this figure was just under 19 percent. More than 72 percent of exhibitors came from European countries, whereas pre-pandemic this proportion was around 60 percent.

Trade Fair Year 2022 it surpassed expectations

- 280 of 410 trade fairs took place - the trade fair bans affected the ramp-up that normally takes place during the first quarter
- more than 141,000 exhibitors and 7.6 million visitors were registered
- 72,000 foreign exhibitors and two million foreign visitors
- around 25 new trade fairs
- the trade fairs contributed almost 14 billion euros to the economic increase - half of the positive contribution to 2019

The economic impact of the coronavirus pandemic

The coronavirus pandemic and the associated trade fair bans left a deep scar on the German trade fair industry. From March 2020, almost 670 trade fairs were cancelled, there were al-

most 87 percent fewer exhibiting companies and visitors at the few trade fairs which did take place between lockdowns, as well as a total economic loss of more than 60 billion euros and generated around ten billion euros less in tax revenue. This is the industry's closing statement on the expiry of the Corona laws in the Infection Control Act at the beginning of April 2023. During the peak of the pandemic, up to 180,000 jobs in the industry could be secured with short-term working allowances. Due to the lack of security, countless specialists left the trade fair industry.



© Messe Düsseldorf GmbH Constanze Tillmann



AUMA is the umbrella association of the German trade fair industry. It represents, both nationally and internationally, the interests of all large and medium-sized trade fair companies in Germany as well as the associations representing exhibitors, service companies and visitors.



AUMA
 Association of the German Trade Fair Industry
 Littenstraße 9
 10179 Berlin
 medien@auma.de
 www.auma.de

Liabile within the meaning of § 18 para. 2 MStV: Steffen Schulze
 Editorial: Anne Böhl, M. A.
 Editorial deadline: June 2023

Authorised representative of the association
 Philip Harting (Chairman)
 Peter Ottmann (1st Deputy Chairman)
 Klaus D. Kremers (2nd Deputy Chairman)

Management:
 Jörn Holtmeier (Managing Director)
 Registered Court: District Court of Berlin Charlottenburg,
 Association registration No: 21 366 Nz
 VAT Identification No: DE 217620114



pictures: © AUMA / Steffen Kugler