



# EMECA Members: driving economic impact and catalysing growth

*Executive Summary*

December 2025



# About this report

## Introduction

### Overview

**Exhibitions** (also referred to as trade shows or trade fairs) are organised marketplaces and meetings where companies and professionals gather to showcase products and services, share knowledge, and create business opportunities <sup>(1)</sup>.

The **exhibition industry** encompasses all economic sectors involved in the planning, production, and management of exhibitions.

Beyond its economic influence, the exhibition industry serves as a dynamic hub for generating business opportunities, facilitating knowledge exchange, and driving innovation. It also contributes to local and regional development, along with other aspects, many of which present a level of complexity that makes them challenging to measure.

### Structure

The report is divided into **three sections**, each dedicated to exploring the following:

#### Total economic impact and impact on employment

Total economic impact and impact on employment created by EMECA members' activity in Europe.

#### Focus on impact

A focus on the impact generated by visitors, exhibitors, and tax contributions.

#### Methodological annex

A comprehensive explanation of the calculation process that produced the results.

## About EMECA



The **European Major Exhibition Centres Association (EMECA)** and its members occupy a pivotal position as the leading representatives of the European exhibition industry.

This socio-economic impact report aims to provide a comprehensive assessment of the value generated by EMECA members and to quantify the economic significance of their activities within the European market during 2023 and 2024.

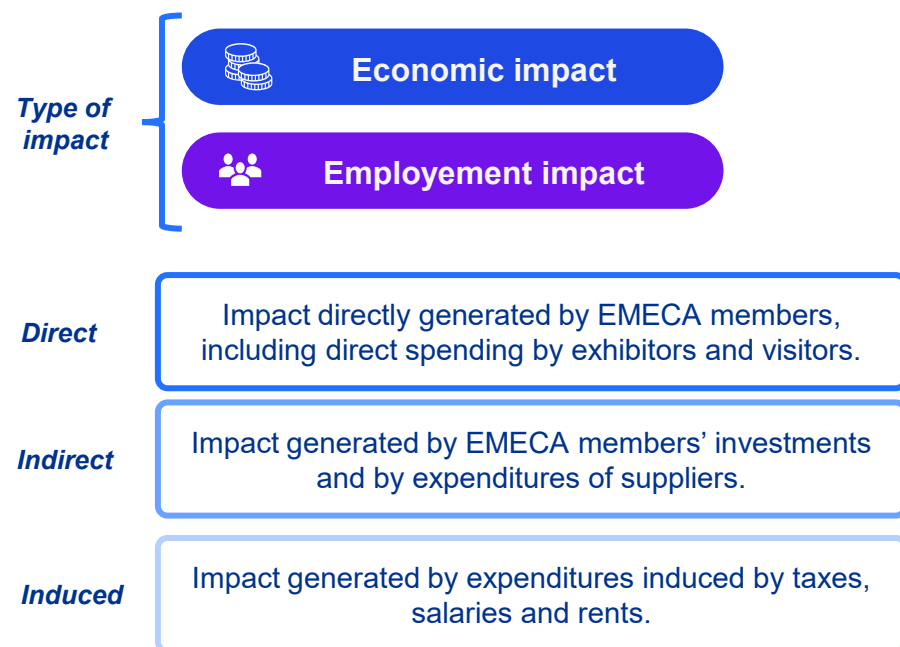
# About this report

## Methodology

### Methodology brief: input-output framework

EMECA members' economic activities are integrated into a broader, interconnected economic system and therefore generate ripple effects across multiple sectors. These effects can be measured using the **input-output framework** <sup>(1)</sup>.

This model measures the total impact on the overall economy. The impact is typically divided into three components: **direct, indirect, and induced impacts**, whether economic or employment-related.



## About the input-output framework

The input-output framework is a statistical and accounting tool that captures the **full spectrum of production and distribution activities** within an economy over a given period.

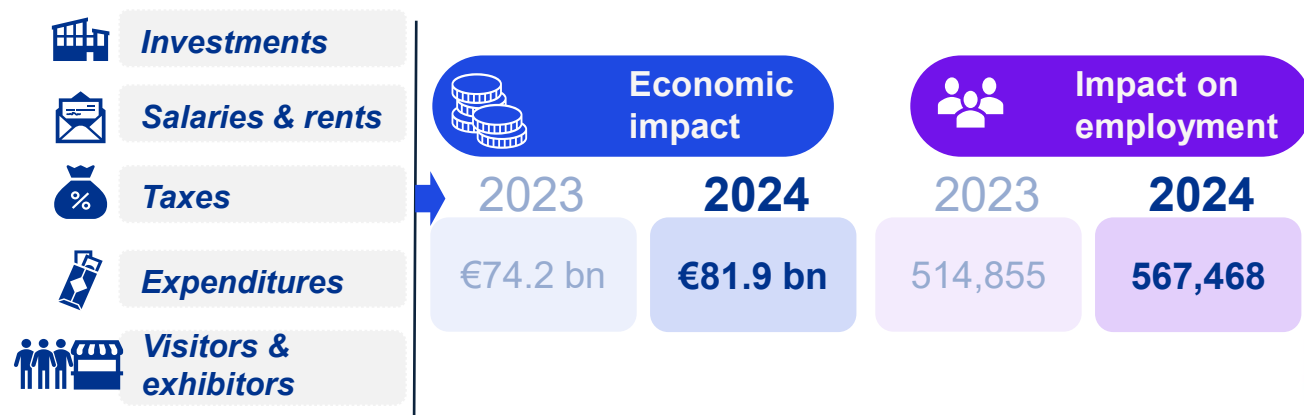
It enables the analysis of intersectoral flows and provides a systematic, detailed representation of the economy, its components, and its interactions with other economies.

# About this report

## Main figures

### Total economic impact and impact on employment

Total economic impact and impact on employment created by EMECA members' activity in Europe.






### Focus on impact

A focus on the impact created by visitors, exhibitors and tax contributions.



## Highlights

-  The activities of EMECA members generated a total impact on the economy of more than €74.2 billion in 2023; and of over **€81.9 billion in 2024**.
-  EMECA members also supported employment for over 514,000 people in 2023 and more than **567,000 in 2024**.
-  EMECA members contributed more than €5.8 billion in direct taxes in 2023 and over **€6.4 billion in 2024**.

# Total economic impact and impact on employment

# EMECA, cornerstone of the European exhibition industry

## A geographic hub in the global exhibition industry

 Europe hosts the largest number of exhibition venues worldwide, including nearly half of the large venues. In terms of million square metres of exhibition space, Europe ranks second only to the Asia-Pacific region.



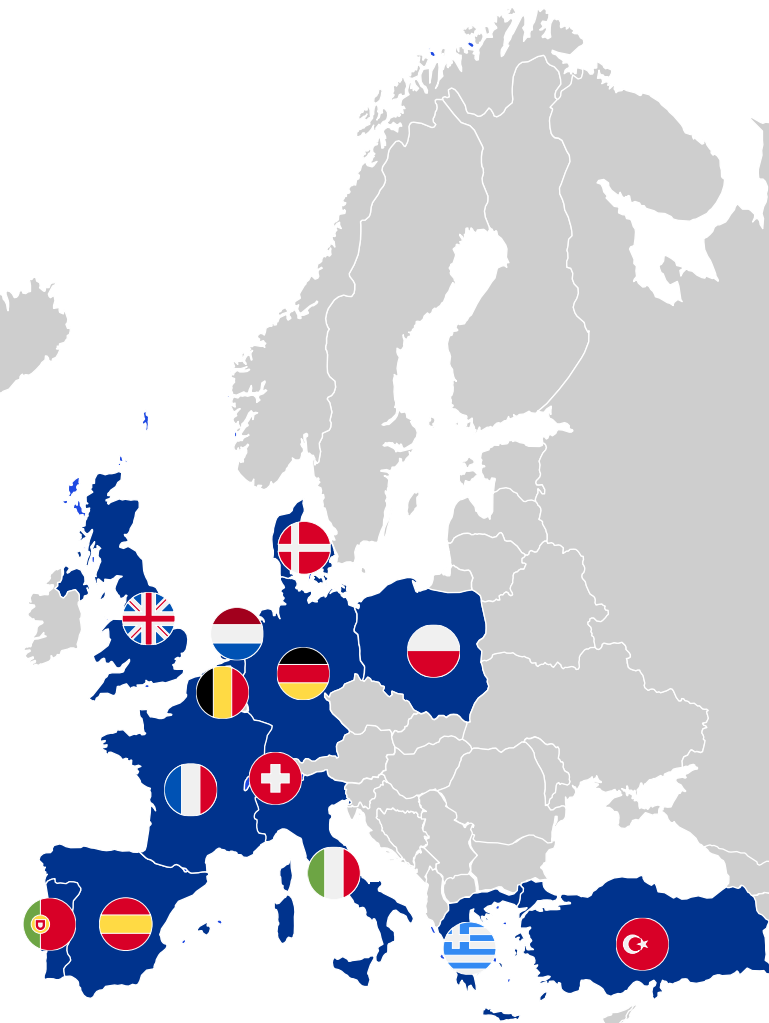
EMECA brings together Europe's largest, leading exhibition venues, many of which are also exhibition and event organisers, and service providers for the exhibition and business events industry. Together, they constitute a significant geographic hub in the global exhibition industry.

Furthermore, all EMECA members operate with an international scope, hosting leading exhibitions and events for each sector and bringing together the international trading community in Europe.

### EMECA members

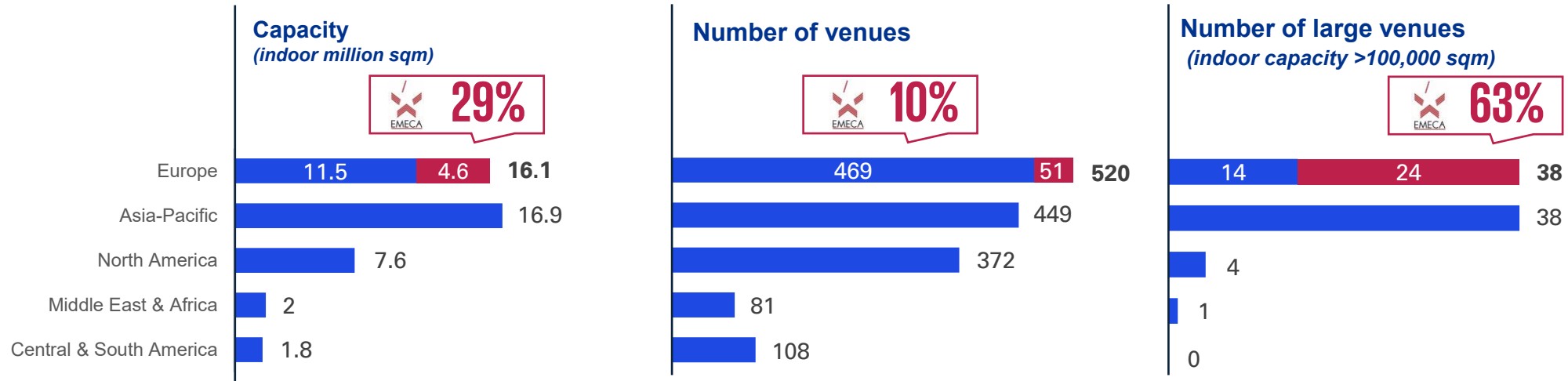


EMECA is formed by 25 members from 13 European countries, totally accounting for 51 venues, hosting more than 1,800 exhibitions and over 4,200 other events on average each year<sup>(1)</sup>, and employing over 10,000 direct staff.



# EMECA, cornerstone of the European exhibition industry

## Capacity and venues



**EMECA members hold almost two-thirds (63%) of the large exhibition venues in Europe, and nearly one-third (29%) of the total European indoor exhibition capacity.**



EMECA unites major leading exhibition venues in Europe. It is a powerful network of venues **with more than 100,000 sqm** or venues that **are the largest and most influential ones** in their country or wider region.



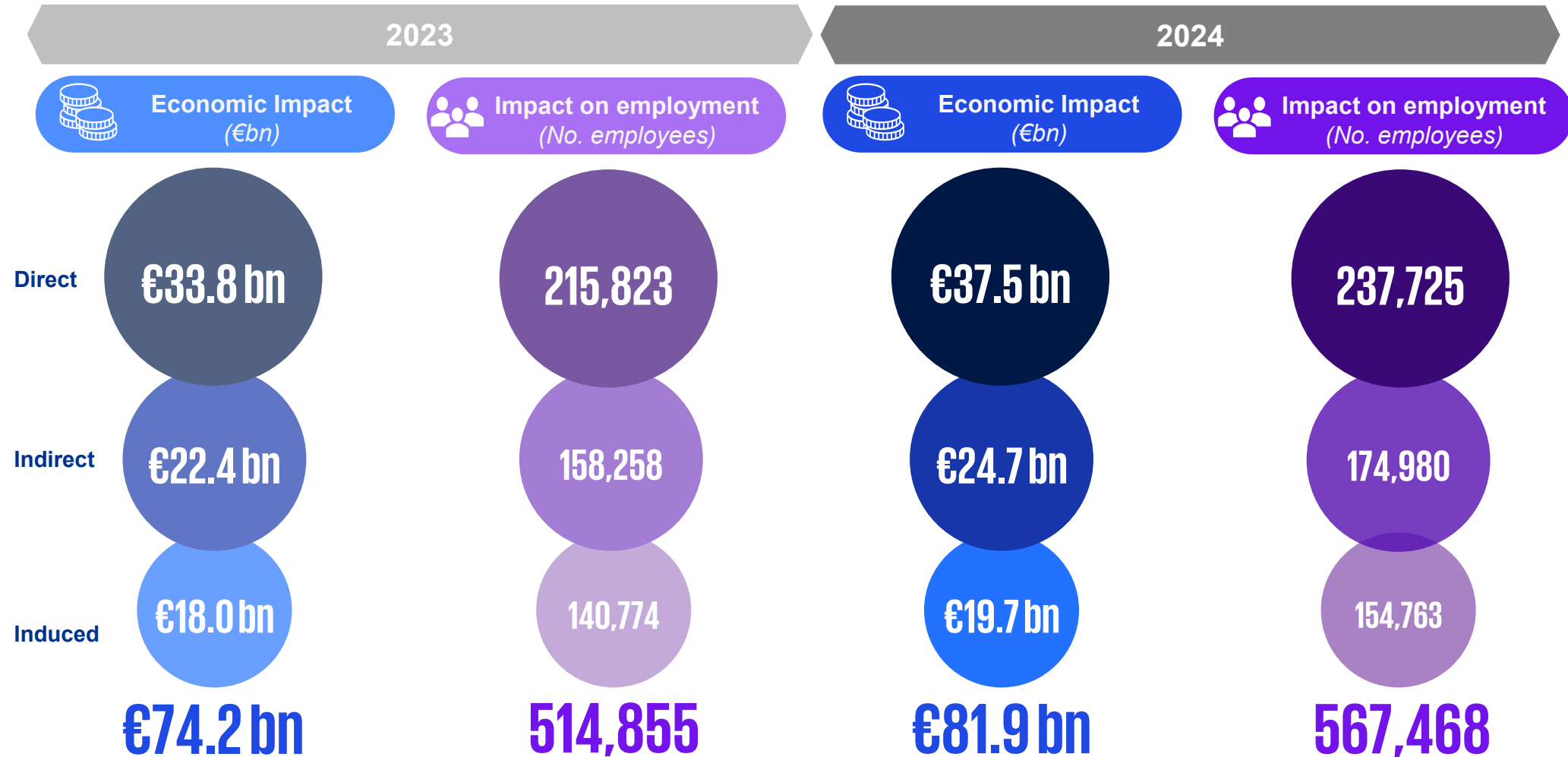
There are 520 exhibition venues<sup>(1)</sup> located in geographical Europe - **more than in any other region in the world**- which shows the relevance of exhibition spaces to European economic activity.



Currently, there are 81 large venues with over 100,000 sqm<sup>(2)</sup> worldwide, of which 38 —**almost half of them—, are located in Europe**. This figure matches that of Asia-Pacific and is considerably higher than in other regions, such as North America.

# EMECA Members' impact in 2023 and 2024

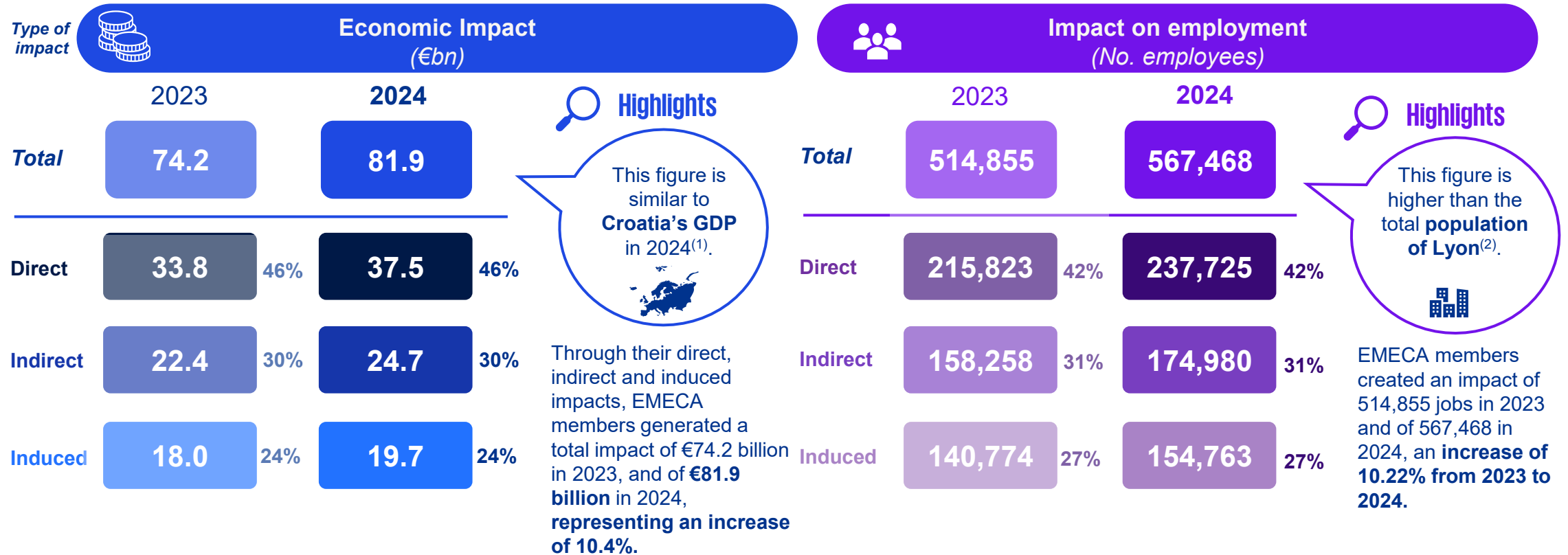
## Annual progress



# EMECA Members' impact in 2023 and 2024

## Socioeconomic impact and impact on employment

EMECA members drive substantial economic growth, creating a powerful ripple effect across multiple sectors. Their **operational investments and expenditures, combined with visitor and exhibitor spending**, drive growth across the supply chain and generate a dynamic effect, **underpinning job creation and adding value well beyond the exhibition industry**.



**Note:** the exhibition industry generates additional positive impacts on the growth of other sectors, which may not be fully reflected in this analysis. Furthermore, as the industry operates on a cyclical basis, outcomes can vary between even and odd years.



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(1) Source: [World Bank](#). 92,98 billion current USD, equals to approximately 80,000 million € on a USD-EUR exchange rate of 0.86.

(2) Source: [INSEE](#) (Institut National de la Statistique et des Études Économiques).

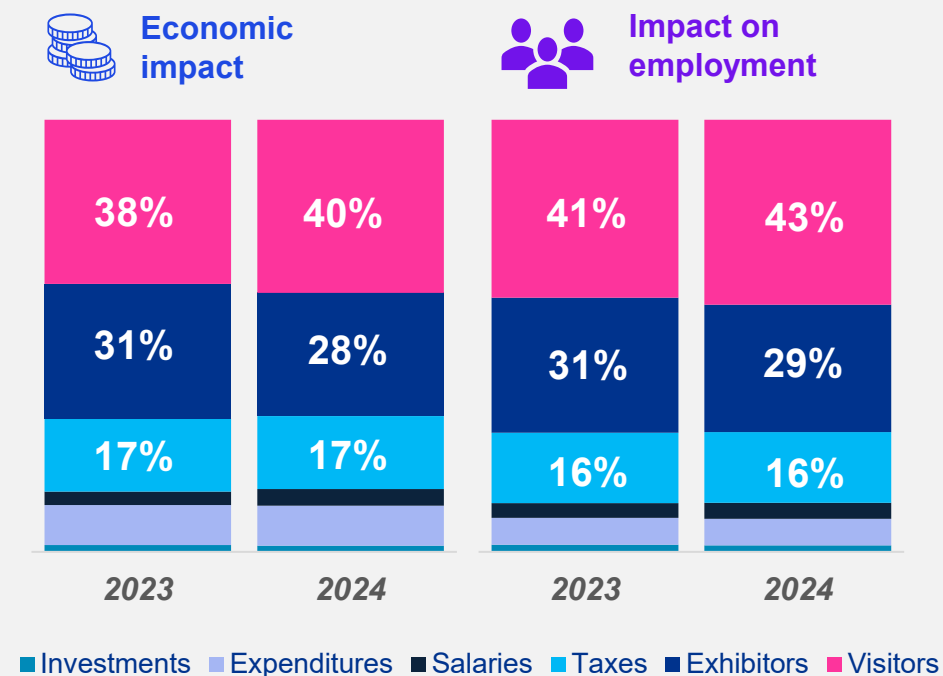
# Understanding the impacts

## A focus on the impact created by visitors, exhibitors and tax contribution

The direct, indirect and induced impacts can be **broken down according to their source within EMECA members' core activities**. This allows for the identification of the elements that contribute most significantly to this positive impact.

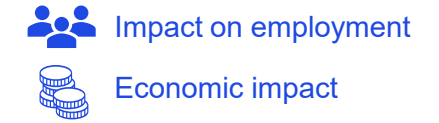
Elements	Scope
 <b>Visitors</b>	Captures the impact of visitors' activities, including their expenditures.
 <b>Exhibitors</b>	Reflects the impact of exhibitors' activities including their expenditures.
 <b>Taxes</b>	Represents the amounts paid to the State or other official bodies as taxes and other charges.
 <b>Salaries &amp; rents</b>	Including payrolls and other employee compensations.
 <b>Expenditures</b>	Refers to the costs required for the normal functioning of the venues, including supplies, regular maintenance, and other related expenses.
 <b>Investments</b>	Any upgrade or expansion activities, such as refurbishments, construction of new buildings, and similar projects.

As illustrated in the graph below, **the largest share of EMECA members' overall impact stems from 'Visitors' and 'Exhibitors', in terms of both economic impact and employment, followed by 'Taxes'.**

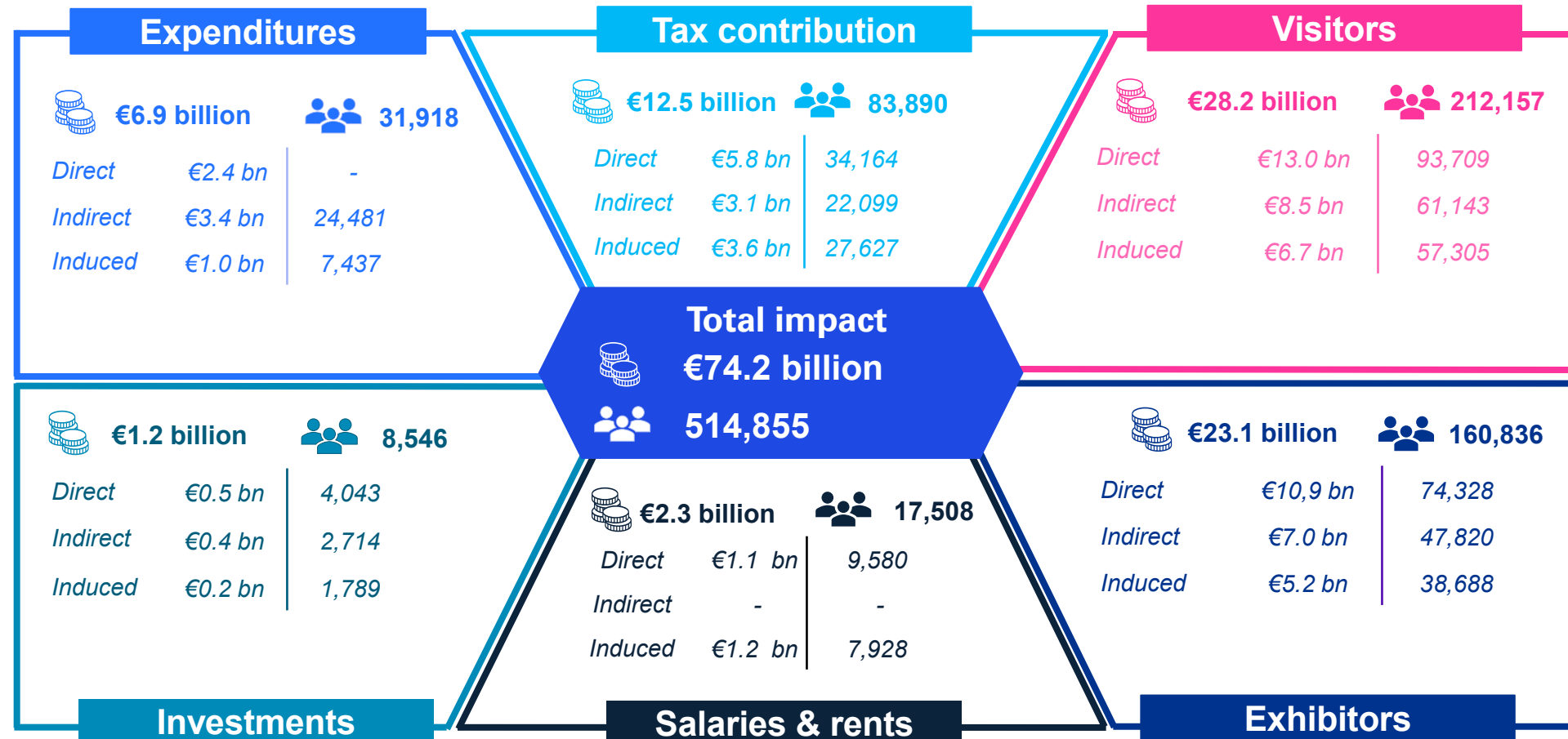


# Understanding the impacts

## Focus on 2023

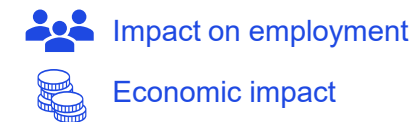


The graph below provides a detailed breakdown of the total impact across its six fundamental components, illustrating their direct, indirect, and induced effects on both economic output and employment.

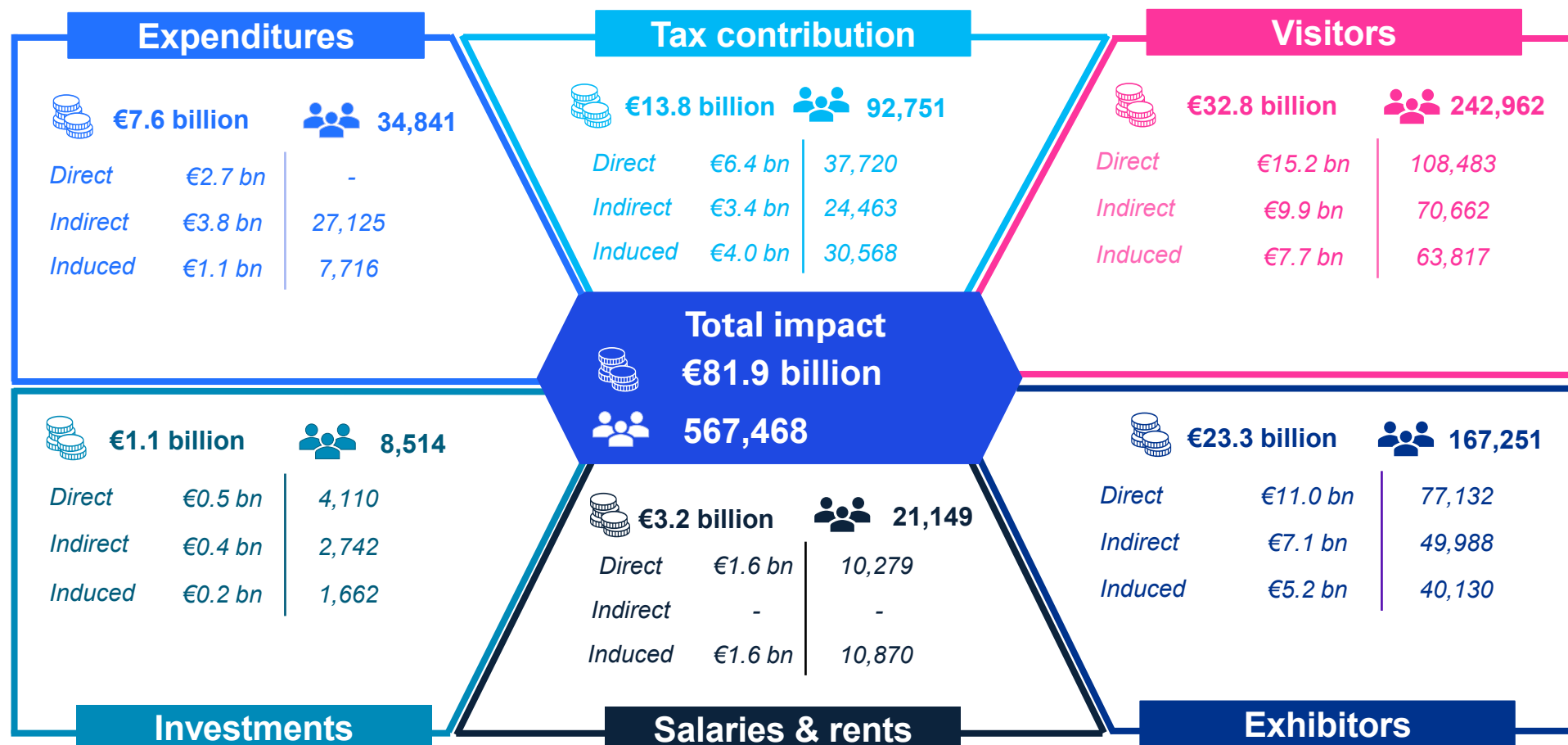


# Understanding the impacts

## Focus on 2024



The graph below provides a detailed breakdown of the total impact across its six fundamental components, illustrating their direct, indirect, and induced effects on both economic output and employment.



# Understanding the impacts

## Dynamising the economy

The activities of EMECA members generate a **positive ripple effect across the economy**, fostering growth and stimulating activity in sectors well beyond the exhibition industry itself. Two distinct dynamic effects can be measured: **the tractor effect and the multiplier effect**.

### Tractor effect

#### Definition

The '**tractor effect**' quantifies the influence exerted on the broader economy by stimulating interconnected industries. This metric **reflects the additional impact generated for every euro that EMECA members inject into the economy**.



For both years analysed, the result stands at **1.19**, meaning that for every euro generated by EMECA members, an additional **€1.19 (119%) of value is generated across the economy**.



### Multiplier effect

#### Definition

The '**multiplier effect**' also incorporates the **direct economic impact of EMECA members venues themselves**, offering a comprehensive perspective on their overall contribution to the economy.



For both years analysed, the multiplier effect stands at **2.19**, meaning that for every euro generated by EMECA members' activities, a total of **€2.19** is generated across the **economy**.



# Understanding the impacts

## Dynamising the economy

This generated value can be further traced to specific economic sectors where EMECA members' impact is particularly significant. EMECA members' venues generated a steadily increasing economic impact over 2023 and 2024. In 2024, that impact amounted to:



### Administrative and support services

It comprises a variety of activities that support general business operations, including the organisation of conventions and trade shows, from travel services and accounting to maintenance activities.

### EMECA impact

Nearly **€8.9 billion** and more than **55,000 jobs** in the “*administrative services*” industry.

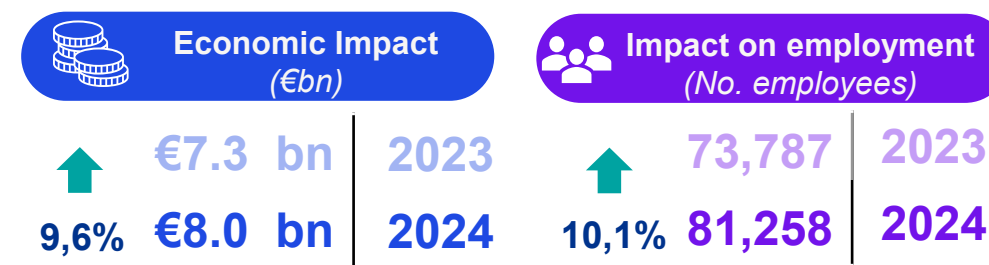
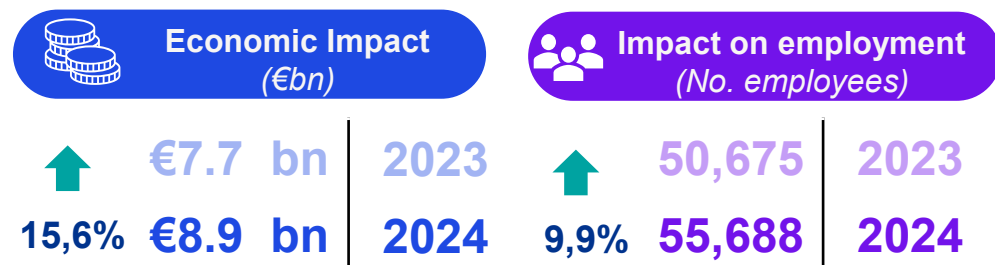


### Wholesale and retail trade

It encompasses the wholesale and retail trade (i.e., the sale without transformation) of all types of goods, along with the provision of services incidental to their sale.

### EMECA impact

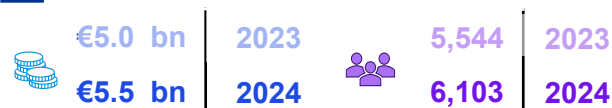
Nearly **€8.0 billion** and more than **81,000 jobs** in the “*Wholesale and retail trade*” industry.



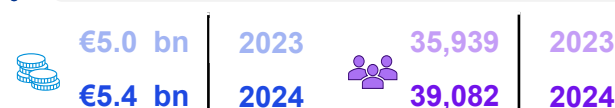
### Other sectors positively impacted by EMECA members:



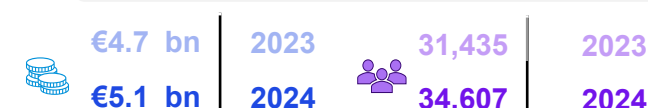
#### Real estate activities



#### Professional, scientific and technical activities



#### Construction



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**Note:** these are merely examples of a few sectors among those where EMECA members deliver a significant impact.

# Focus: visitors, exhibitors and tax contribution

# Focus on exhibitors

## Numbers and origins

The **second largest share of EMECA members' economic impact** (31% in 2023 and 28% in 2024) is attributable to **exhibitors**.

### Elements



#### Exhibitors

### Scope

An 'exhibitor' is an organisation, company, or individual that participates in an exhibition or trade fair by showcasing products, services, or solutions within a designated space.



#### International exhibitors

'International exhibitor' means any exhibitor hailing from other European countries (excluding the venue's home country), or from any other country elsewhere in the world.

### Total number of exhibitors per year

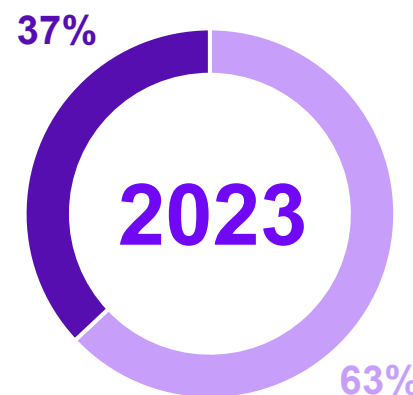


388,667

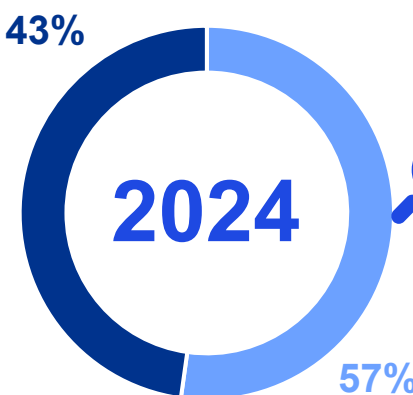


378,723

↑ 6 p.p.



International  
National



International  
National

While the absolute number of exhibitors decreased slightly, due to exhibition cycles across the years, **the share of international exhibitors increased substantially between 2023 and 2024 by 6 percentage points (p.p).**

In 2023, EMECA members **hosted over 388,000 exhibitors**, nearly 63% of whom were national exhibitors and 37% were international exhibitors. In 2024, EMECA members received **more than 378,000 exhibitors**, of whom 57% were national exhibitors and 43% were international.

# Focus on visitors

## Numbers and origins

As highlighted in the previous section, **the largest share** of EMECA members' economic impact (38% in 2023 and 40% in 2024) **stems from visitors to EMECA members' venues**.

### Elements

### Scope



#### Visitors

A 'visitor' refers to any individual attending an exhibition, trade fair, or other event without exhibiting. Their primary purpose for attending includes conducting business, knowledge exchange, benchmarking, networking, and other new experiences.



#### International visitors

'International visitor' means any visitor hailing from other European countries (excluding the venue's home country), or from any other country elsewhere in the world.

### Total number of visitors per year

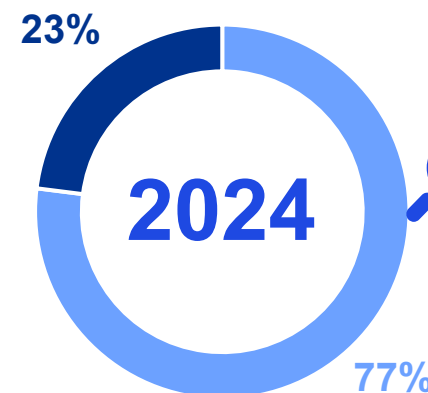
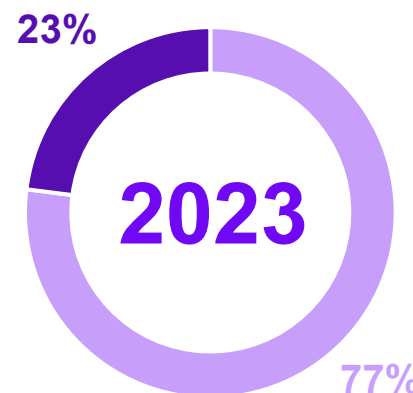


34.7 mn



39.2 mn

↑ 13%



In 2023, EMECA members welcomed **over 34.7 million visitors**, approximately 77% of whom were national visitors and 23% were international.

In 2024, **EMECA members received more than 39.2 million visitors**, almost 13% more than the previous year, while maintaining the same distribution between national (77%) and international attendees (23%).

# Focus on exhibitors' and visitors' expenditure

## Numbers and origins

**International exhibitors and visitors** generate a greater economic impact than their national counterparts. For example, they typically require transportation and hospitality services, such as accommodation or catering, that local participants may not need to the same extent.



### Exhibitor expenditure (€ on average per single exhibitor)

	2023	2024
National	€33,771	€33,309
International	€67,194	€66,276
<b>Difference</b>	99%	99%
Overall average	€46,277	€47,480



**International exhibitors and visitors spend more on average and, thus, have a greater impact on the economy** compared to their national counterparts.



### Visitor expenditure (€ on average per single visitor)

	2023	2024
National	€398	€410
International	€1,307	€1,354
<b>Difference</b>	228.4%	230.2%
Overall average	€607	€629



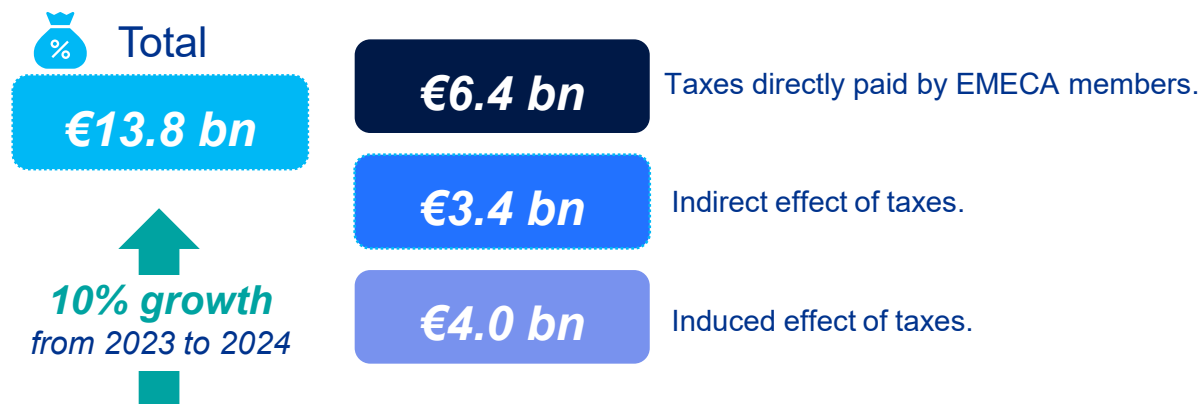
**International exhibitors** spend, on average, nearly twice (99%) as much as national exhibitors. **International visitors** spend, on average, more than three times (230%) as much as national visitors.

# Focus on tax contribution

## Numbers and origins

Through their tax contributions, EMECA members **actively support wealth redistribution and reinforce the foundations of the welfare state**, benefiting a wide range of communities and sectors. Taxes also play a significant role in the total impact, accounting for 17% of EMECA members' total impact in both 2023 and 2024.

### 2024



EMECA members paid **€5.8 bn of direct taxes in 2023**, which created an additional positive impact on the economy of **€6.7 bn** through indirect and induced effects.



In 2024, EMECA members paid **€6.4 bn in direct taxes**, generating an impact of additional **€7.4 bn**. An overall increase of 10%.

### 2023



# Methodology

# Methodology

The methodology used is based on the input-output framework, which is a statistical-accounting instrument that represents the entirety of production and distribution operations that take place in an economy in a given period of time. It allows the flows of the different intersectoral transactions in a given economy to be observed for a reference year.

The purpose of the input-output framework is to provide a systematic and detailed description of the economy, its components and its relationship with other economies. The model built, which served as a basis for the tool we use in the study, is based on the general Leontief closed system methodology. This is defined by the equation:

$$X=AX+DF$$

Where:

**X** is the matrix of the production of the different homogeneous branches of activity.

**A** is the matrix of coefficients of production (each intermediate consumption divided by the production of said branch).

**DF** is the final demand vector of the system.

The study model we have used is defined by the equation based on the Leontief inverse matrix:

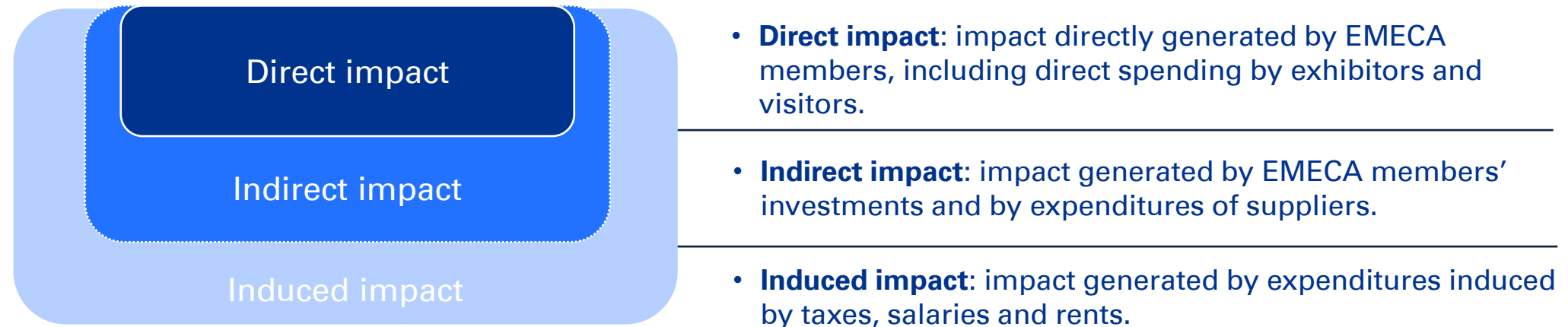
$$X=(I-A)^{-1} DF$$

**A** is the matrix of coefficients of production (each intermediate consumption divided by the production of said branch).

**DF** is the final demand vector of the system.

# Methodology

The methodology allows us to observe a series of effects on the production of the system, linked to the final, exogenous demand thereof. These are disaggregated into **direct, indirect and induced impacts**. Leontief's inverse matrix captures the effect of successive rounds of economic transactions that occur between the different sectors once demand increases in one or several of them.



Data for the elaboration of this report has been gathered through two main inputs: (i) information provided by each EMECA member via a request for information document sent by KPMG and filled by each member, which included their audited annual accounts; and (ii) public information such as data published by the OECD.

# Methodology

For the purposes of calculating the direct and indirect impacts of the activities of the members of EMECA on the economy of each of their countries, the input-output matrices published by the OECD have been used.

The symmetric table for each of the countries of EMECA members has been used. This table establishes the intersectoral relationships that take place in the economy of each country for a reference year.

The sectors included in this table correspond to the sectors established by the United Nations Statistics Division in its [ISIC Rev. 4 classification](#).

Data corresponding to sector employment in each of the EMECA member countries has also been [obtained from the OECD](#). This information was used to calculate the number of jobs generated in each of the sectors of the different economies.

Using data by sector, production and employment, rules of proportionality can be established to ascertain the direct, indirect and induced employment generated for a given level of production.

For our work, we have used the input-output methodology that also allowed us to calculate the contribution of EMECA members to the economy of their countries in terms of contribution to GDP.

The inputs used in the model include direct expenditures by EMECA members, that is: the salary expense of paying their employees, their payments to suppliers and the payment of taxes to public authorities.

To quantify this expenditure and the sectors in which it is carried out, data from [OECD](#) has been used, which shows the type of expenditure structure of a consumer in a given country. After discounting payments to social security, payments for personal income tax and savings, and distributing these expenses among the different sectors of the symmetrical table of domestic production at basic prices, we are able to calculate the direct, indirect and induced effects of EMECA members.

# Methodology

The type of expenditure mentioned has been distributed proportionally among the different sectors of the ISIC classification present in the input-output matrix, thereby transferring this effect to the calculations performed to obtain the corresponding indirect and induced effects.

In relation to purchases from suppliers, a similar approach to that used for employee salary spending can be taken, i.e. distributing it among the sectors of the ISIC classification present in the symmetric matrix of the input-output framework.

We note that EMECA members have broadly provided the information requested. In the few data entries that were necessary to estimate, the estimation process relied on the direct economic impact (excl. VAT) as the primary reference, ensuring consistency across all entries. This methodology was adopted to provide a reliable foundation for subsequent analysis and reporting.

KPMG has not independently verified the information for each member and is not to be held accountable for any deficiencies or inaccuracies on the received data.



**Disclaimer:** this document represents an executive summary of the project measuring the socio-economic impact of EMECA members' venues and contains the results of the calculations undertaken. The full report contains more detail about the methodology used, the glossary of terms, comparisons to put into context the results, as well as references to other third-party reports that could provide relevant indicators. Changes and modifications of the figures, messages and/or the overall layout are possible.

