



EMECA Members: driving economic impact and catalysing growth

Final Report

04 June 2026



Acknowledgments

A message from EMECA

We would like to express our sincere gratitude to all EMECA Members for their unwavering support and availability throughout this project.

Your active participation and valuable contributions were instrumental in achieving the objectives of this analysis.

We also extend our thanks to the EMECA Researchers' Working Group, and in particular, to the Task Force, for their close collaboration. Their expertise and guidance have been instrumental in deepening our understanding of the industry and of EMECA's role as a driving force, both economically and socially.

We trust that the outcome of this joint effort faithfully reflects your engagement and commitment.



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01

Introduction



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 ⁽¹⁾.

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 are complex and challenging to measure.

Structure

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

Total economic impact and employment impact

Total economic impact and employment impact created by EMECA Members' activity in geographical Europe.

Extrapolation to geographical Europe

An extrapolation of the outcomes generated by EMECA Members' activities to the broader exhibition sector across geographical Europe.

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.

⁽¹⁾ Source: [Overview of the exhibition industry \(UFI\)](#).

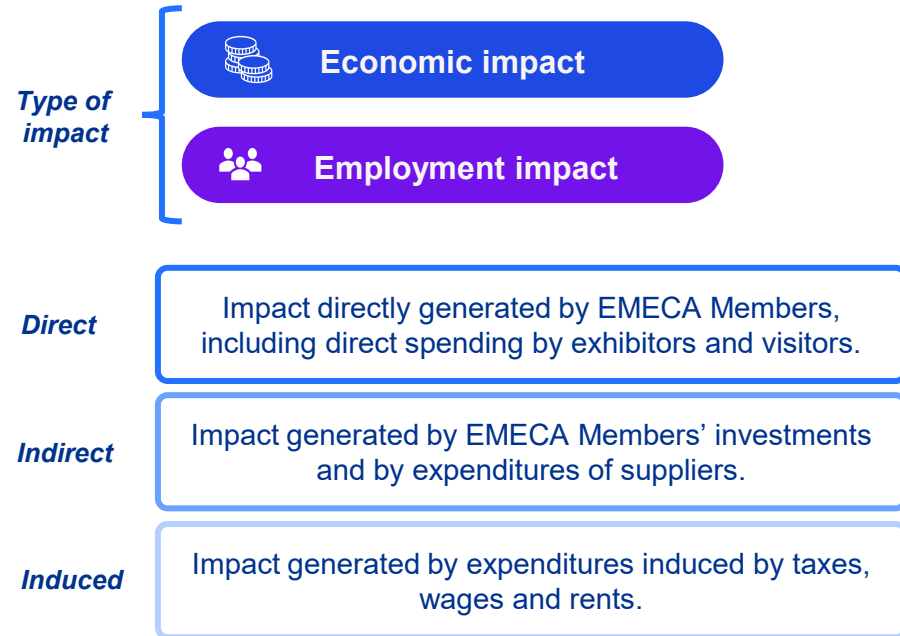
About this report

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 ⁽¹⁾.

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 range 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.

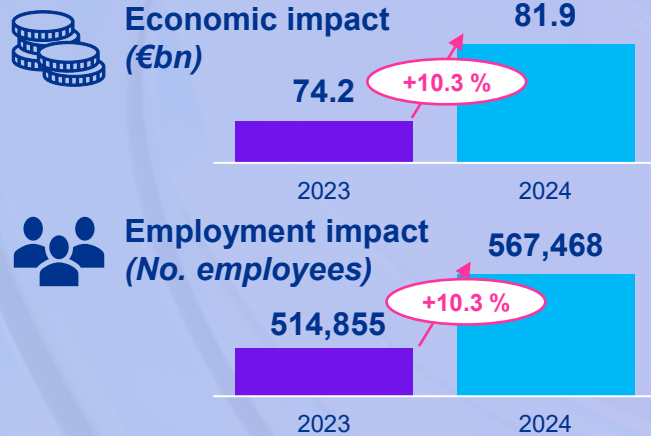
⁽¹⁾ Please refer to the methodological annex of this document for more information on the input-output framework.

About this report

Main figures

Creating a positive impact

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



25

EMECA Members representing Europe's leading exhibition venues

13

From 13 European countries

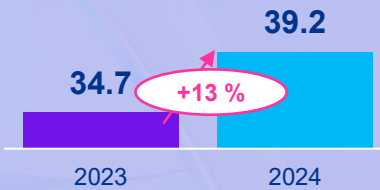
51

Exhibition venues

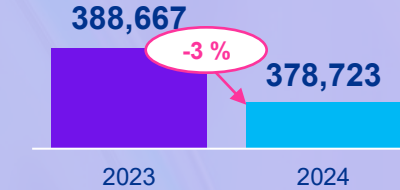
6.1

million m² Exhibition space

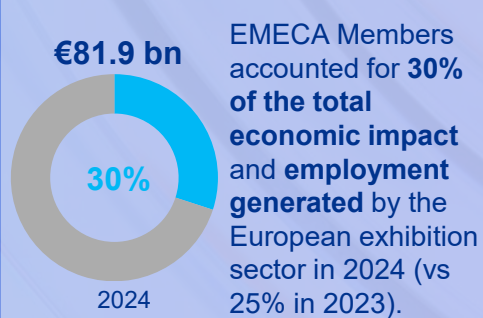
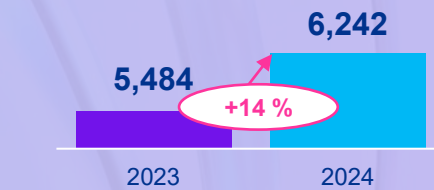
Number of visitors (mn)



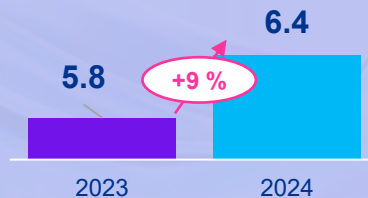
Number of exhibitors



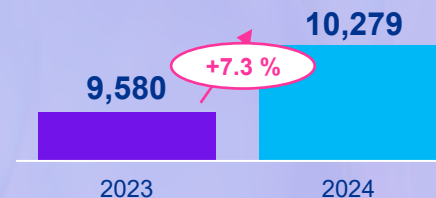
Number of events held



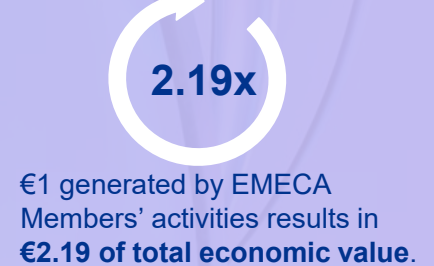
Direct impact on taxes (€bn)



EMECA Members' employees



Multiplier effect



EMECA Members' economic impact continues to grow



€81.9 bn

total economic impact in 2024

↑ (+10.3% vs 2023)

Driven by:

- ✓ Exhibitor and visitor spending
- ✓ Operations and investments
- ✓ Supply chain effects

”

Equivalent to the GDP of


Croatia in 2024⁽¹⁾.



EMECA drives a major economic impact in Europe each year.

(1) Source: [World Bank](#) 92.98 billion current USD, equals approximately 79.96 billion EUR on a USD-EUR exchange rate of 0.86.

The same increase is reflected on employment impact from EMECA Members

 **567,468**
jobs supported in 2024
↑ (+10.3% vs 2023)
Impact extends beyond venues to:

- ✓ Supply chain
- ✓ Services, transport, hospitality

Higher than the population of

Lyon in 2024⁽¹⁾.



EMECA Members are a key employment driver, supporting job creation across multiple sectors.

And it is very similar in the case of direct tax impact

 **€6.4 bn**

direct taxes in 2024

 **(+10% vs 2023)**

Additional indirect and induced fiscal impact generated.

Through their tax contributions, EMECA Members actively support wealth redistribution, dynamising the economy and benefiting a wide range of communities and sectors.



Tax impact accounts for ~17% of total impact.

EMECA Members drive Europe's exhibition industry impact

Scale & Reach



51 venues across 13 countries



39.2M visitors



378k exhibitors

Market Leadership

~30%

of large venues in Europe

~29%

of total indoor capacity



~1/3

of the sector's overall impact



EMECA Members act as a structural pillar of the sector.

EMECA Members' multiplier effect reinforces value creation across the wider economy



Rank	Industry	Multiplier effect
10	Manufacturing	2.32x
11	Construction	2.23x
12	EMECA Members	2.19x
13	Other service activities	1.98x
14	Arts, entertainment and recreation	1.95x
15	Real estate activities	1.87x

€1 generated by EMECA Members' activities results in €2.19 of total economic value in Europe.
EMECA Members' activity would rank 12th by multiplier effect in the economy.



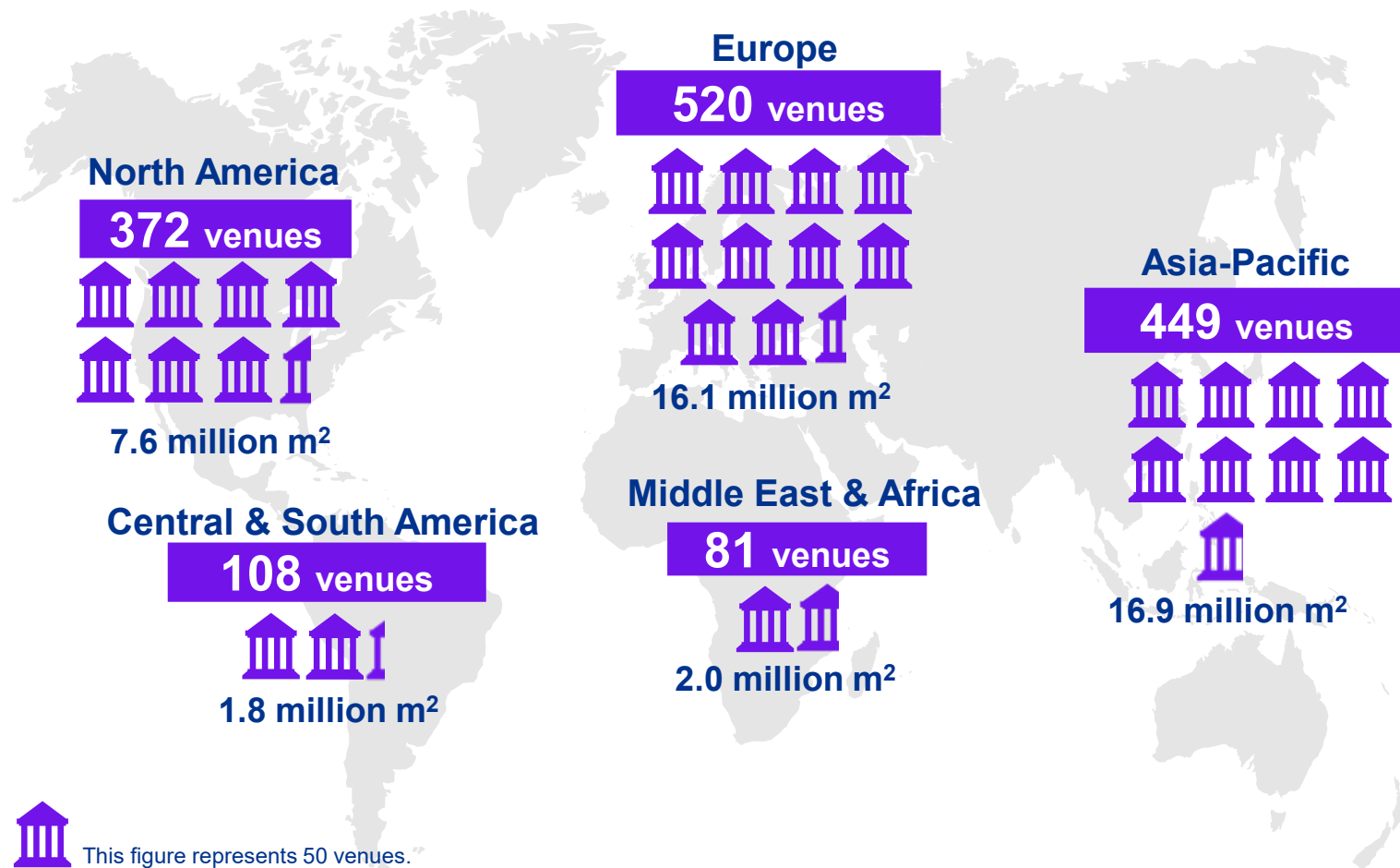
This effect is higher than the multiplier effect in key sectors such as other services, arts, entertainment and recreation, and real estate activities.

02

The European exhibition industry: a catalyst for broader economic dynamism

The exhibition industry worldwide

A hub for innovation and market interconnection



The exhibition industry **serves as a hub for innovation and market interconnection**, boosting local economies and their competitiveness in global markets.

This industry encompasses all economic actors whose **core activities include planning, producing and managing meetings** designed for professional, business, cultural, leisure or informational purposes.

Global total of the sector



1,530

Exhibition venues



44.3

Million m² of capacity

Note: The figures below represent the total indoor exhibition space per region; *Source:* [World Map of Exhibition Venues \(UFI\) 2025](#)

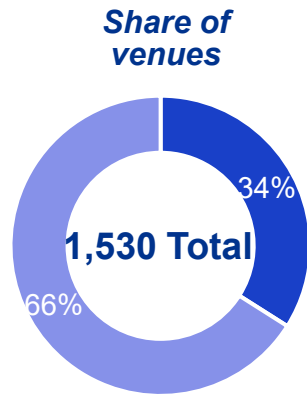
Europe is a key global hub for exhibition sector

High concentration of venues, capacity and large-scale infrastructure

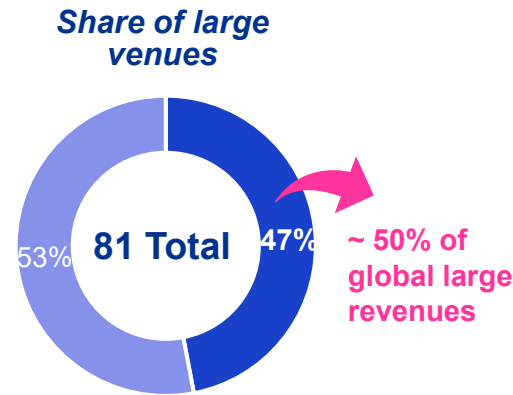
Europe hosts the greatest number of venues, including almost half of the worldwide large venues, and ranks second only to Asia-Pacific in terms of million square meters of exhibition space.



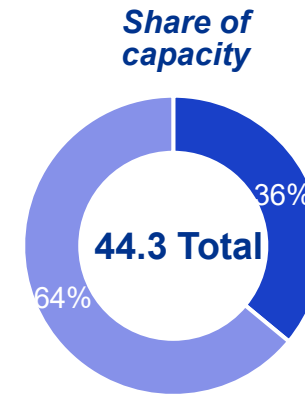
520 Exhibition venues ⁽¹⁾



38 Of these venues are classified as “large” ⁽¹⁾ representing nearly half of the large venues globally



16.1 Million m² of capacity ⁽¹⁾



Europe hosts ~50% of global large venues, reinforcing its leading role.

⁽¹⁾ World Map of Exhibition Venues (UFI) 2025

03

EMECA: leading the exhibition sector in Europe

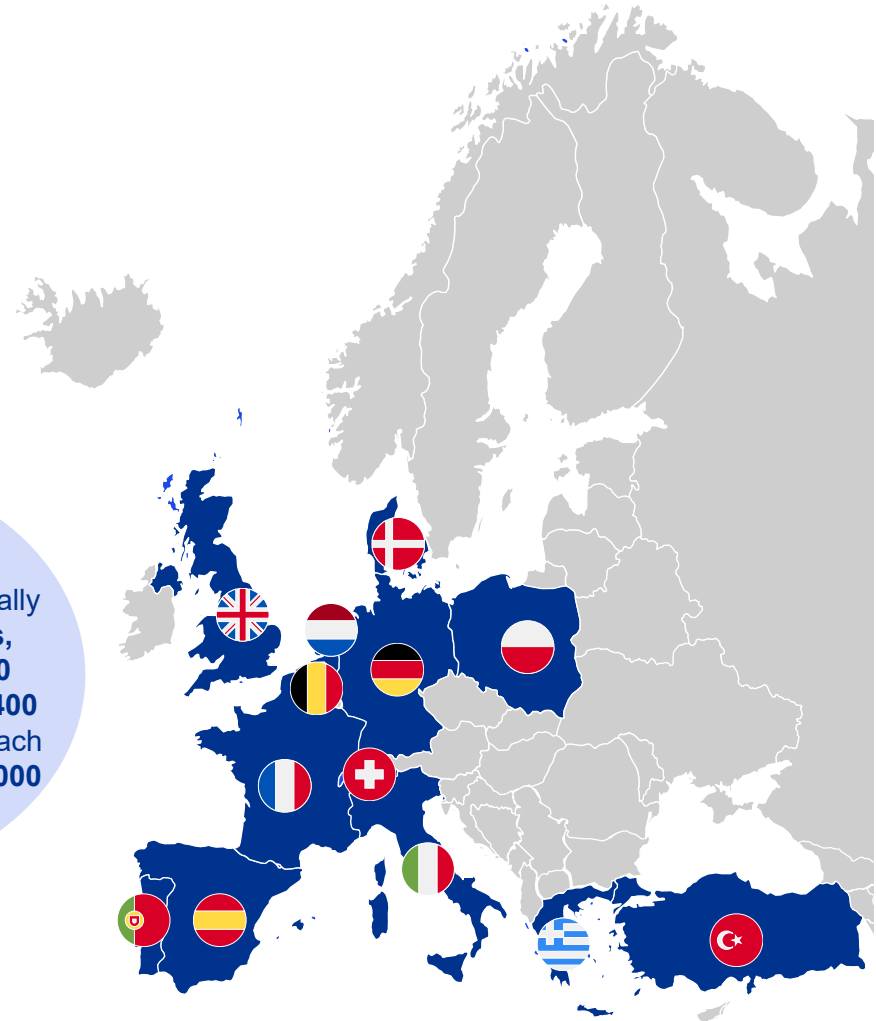
EMECA, cornerstone of the European exhibition industry

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 is formed by 25 members from 13 European countries, totally accounting for 51 venues, hosting more than 1,800 exhibitions and nearly 4,400 other events on average each year⁽¹⁾, and employing 10,000 direct staff.

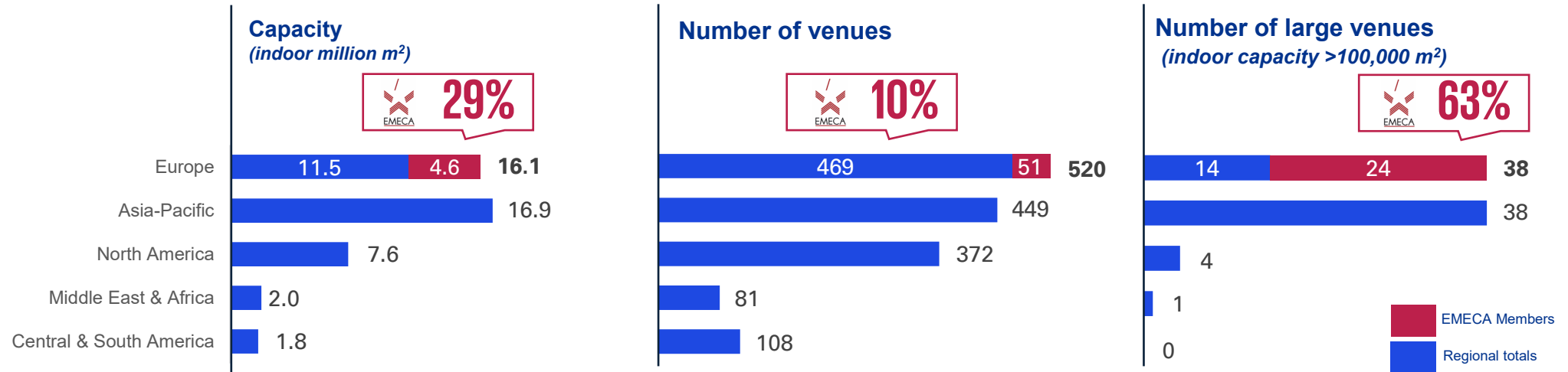
EMECA members



(1) Reference year: 2024.

EMECA, cornerstone of the European exhibition industry

Capacity and venues ⁽¹⁾



EMECA represents ~30% of Europe’s exhibition capacity and a majority of large venues.



Leading exhibition network

Largest and most influential venues across Europe (100,000 m²).



Strong European footprint

520 venues in Europe ⁽¹⁾—the largest global concentration.



Dominance in large venues

Almost half of the world’s largest venues located in Europe.

(1) Source: [World Map of Exhibition Venues \(UFI\) 2025](#); (2) A venue is considered to be “large” when it has a capacity equal or greater than 100,000 square metres (m²).

04

Impact of EMECA Members

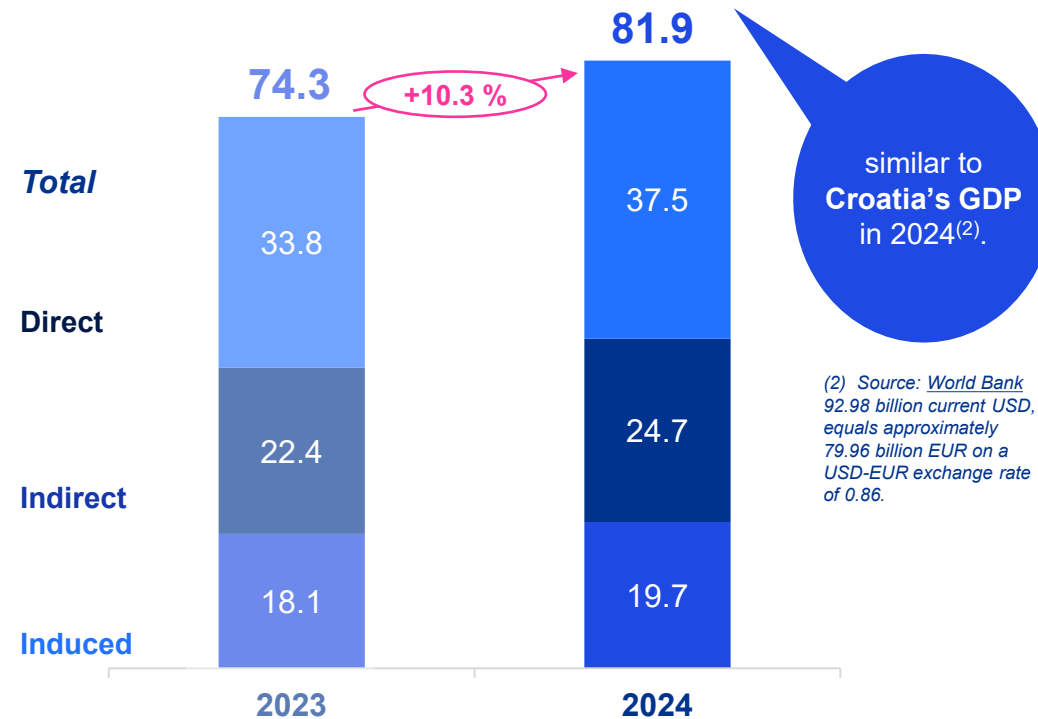
04.1

Economic and employment impact

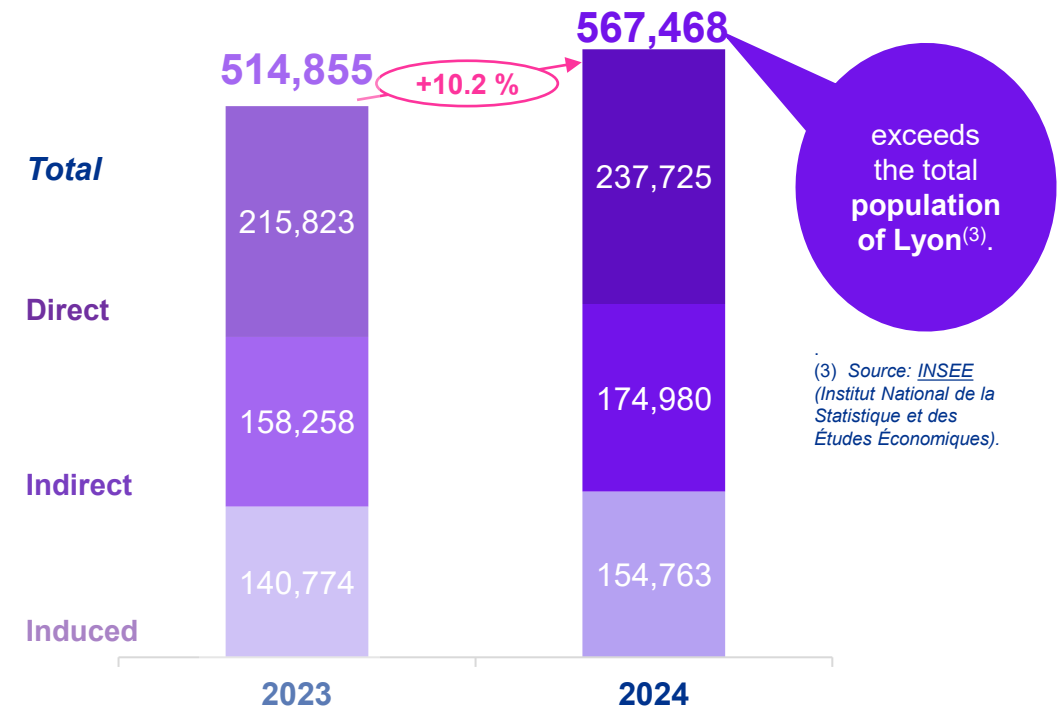
Significant and growing impact from EMECA Members

Economic and employment effects extend across the economy

Economic Impact (€bn)



Employment impact (No. employees)⁽¹⁾



+10% growth in economic and employment impact from EMECA Members

(1) The "direct Employment impact" of EMECA Members does not correspond with the number of employees directly hired by them. The employment impact of their own staff is accounted for within the "rents and salaries" part of the direct impact. This figure contains the whole direct Employment impact, including expenditures, investments, tax contributions, visitors and exhibitors.

Visitors and exhibitors drive EMECA Members' impact

Visitors and exhibitors account for the largest economic and employment impact

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

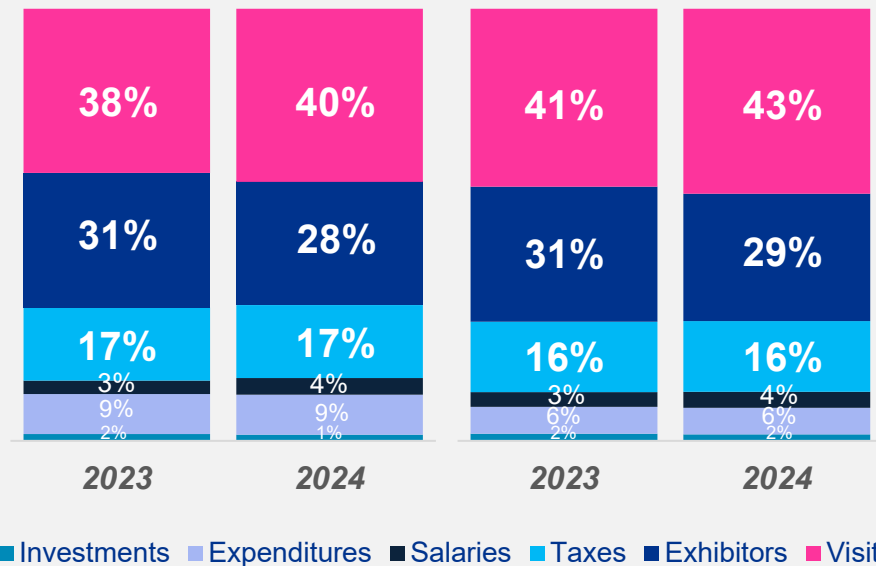
The largest share of EMECA Members' overall impact arises from 'Visitors' and 'Exhibitors', in terms of both economic and employment impact, followed by 'Taxes'.



Economic impact



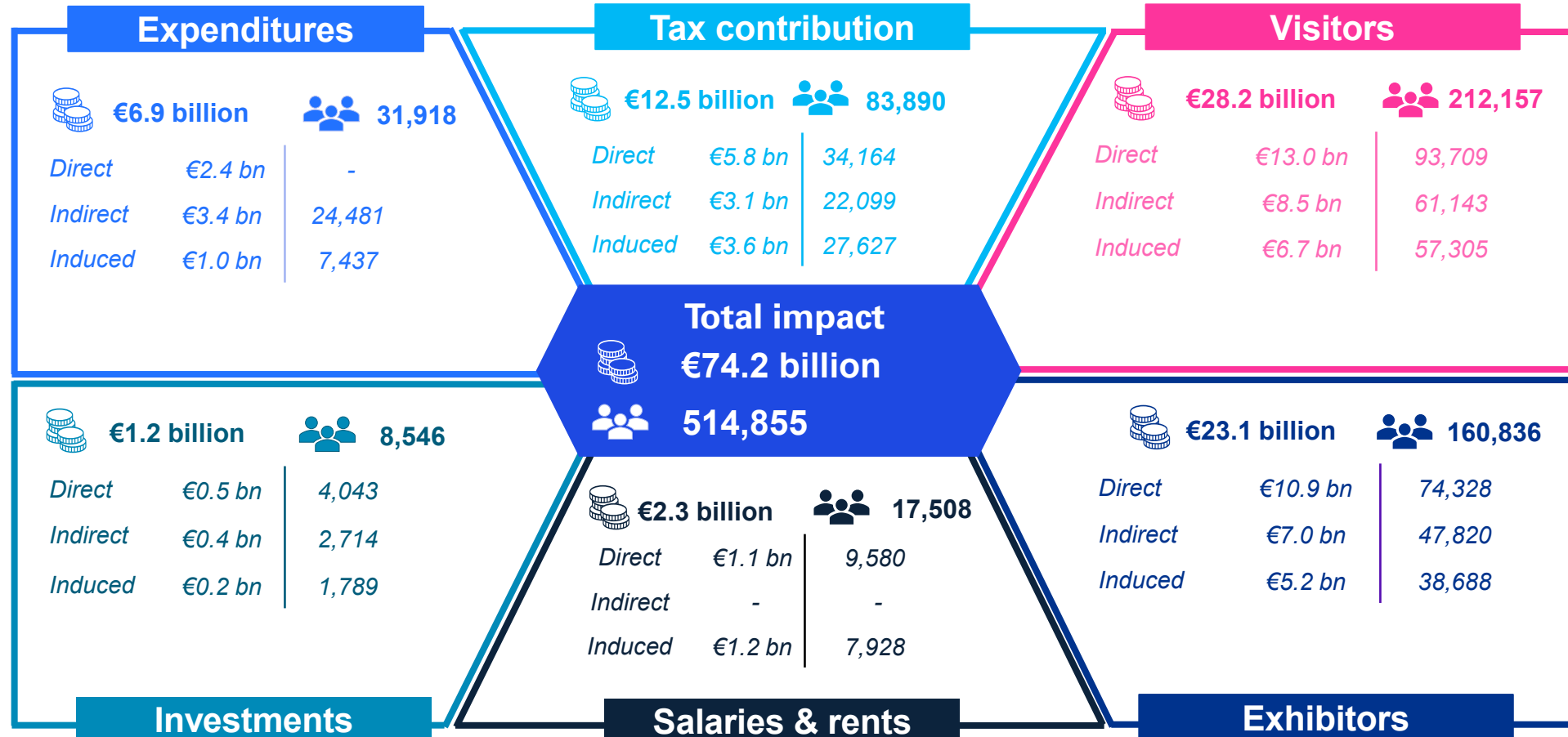
Impact on employment



Sources of economic impact

EMECA Members. Focus 2023

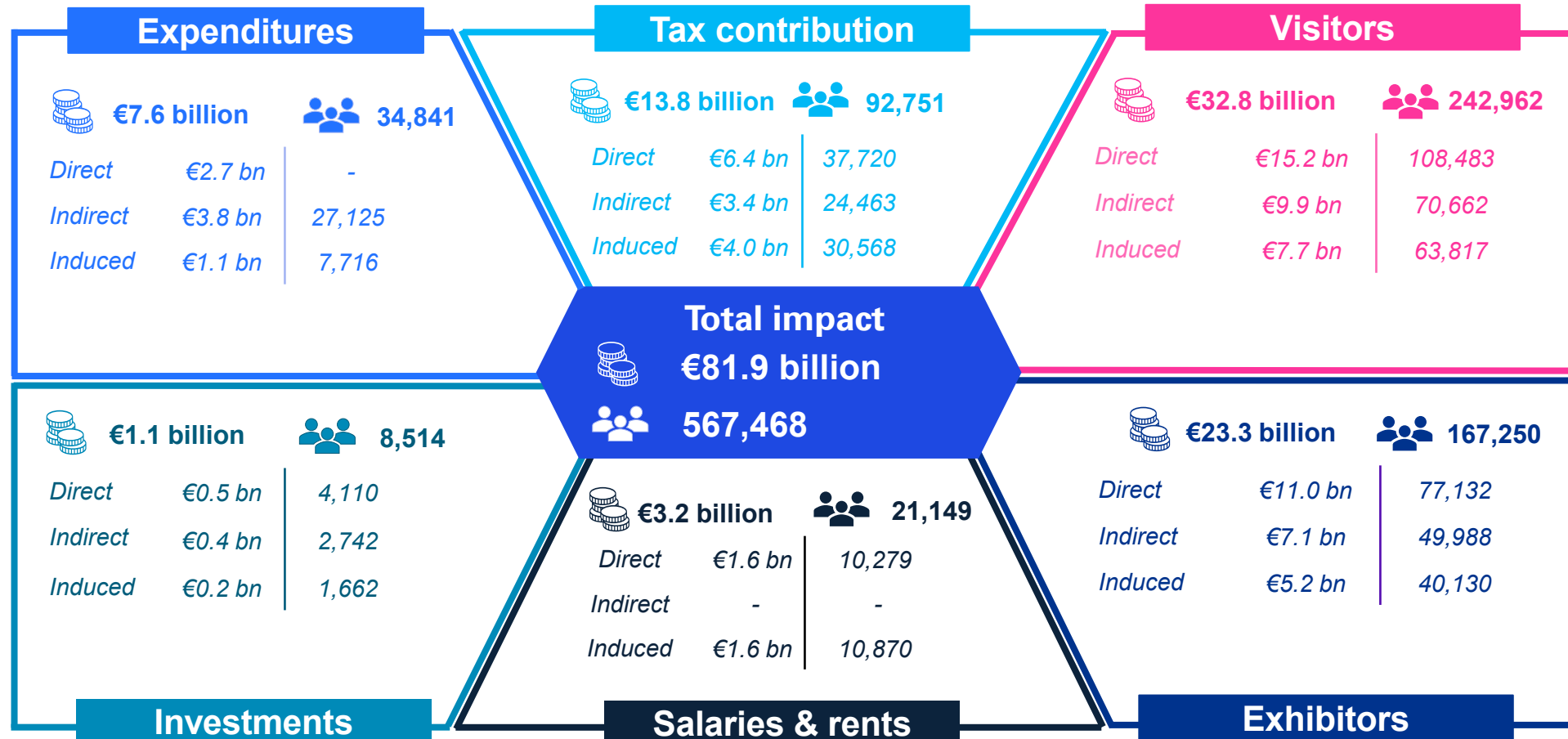
The graph below shows how economic impact is generated across its six main drivers, including expenditures, visitors and exhibitors.



Sources of economic impact

EMECA Members. Focus 2024

The graph below shows how economic impact is generated across its six main drivers, including expenditures, visitors and exhibitors.



EMECA Members' activity generates strong effects

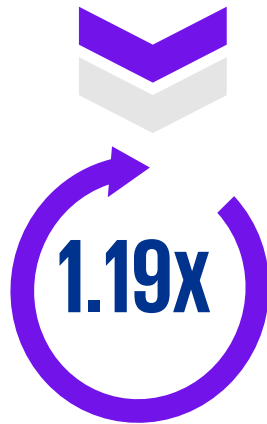
Economic activity extends beyond venues, stimulating interconnected sectors across the value chain

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. Three distinct dynamic effects can be measured: **the tractor effect, the multiplier effect and the impact per euro of revenues.**

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.**



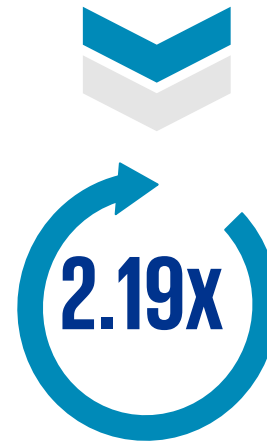
For both years analysed, the result stands at **1.19**, meaning that for every euro generated by EMECA Members, **an additional €1.19 of value is generated across the economy.**



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.**



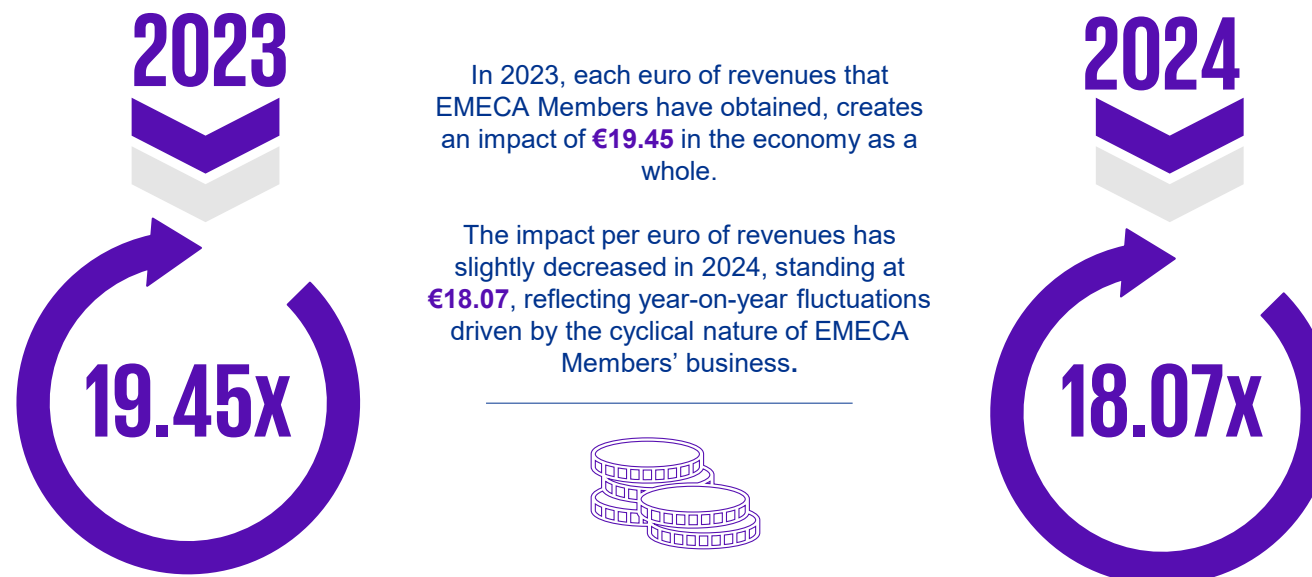
Each euro of EMECA Members' revenues translates into economic impact

Member revenues trigger additional value creation across the economy through multiplier effects

Impact per euro of revenues

Definition

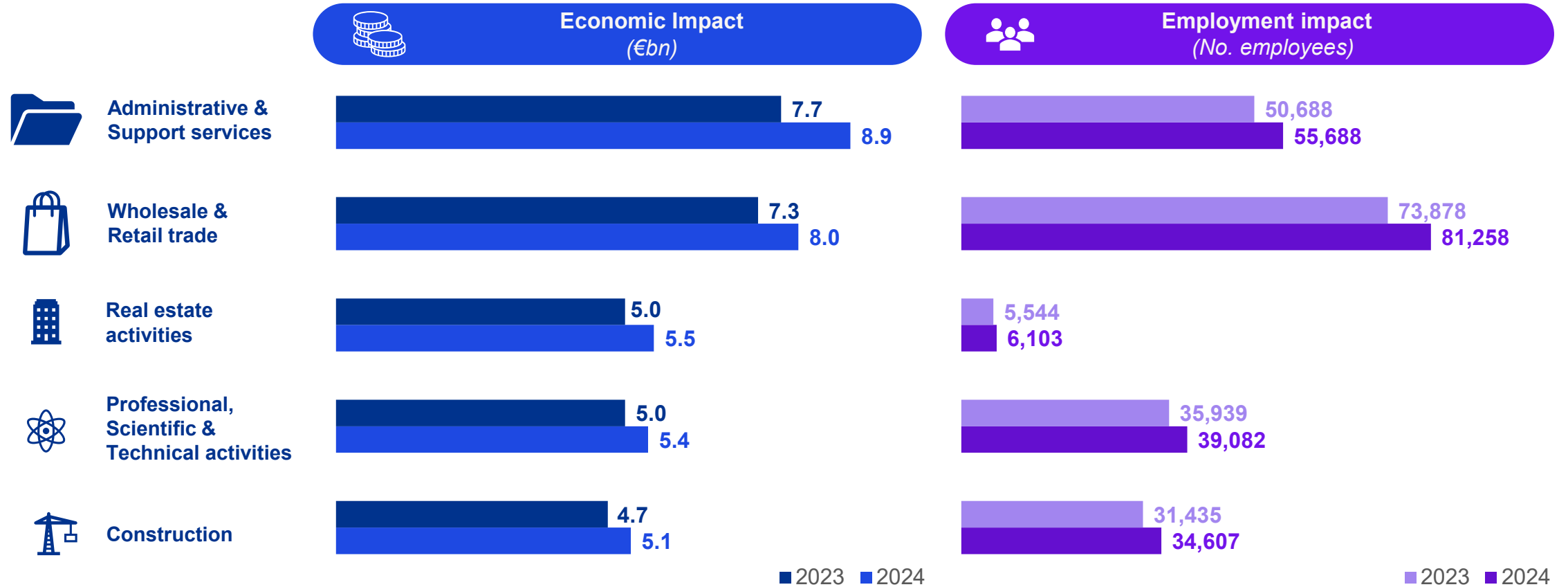
The **impact per euro of revenues** indicates the economy-wide value generated for each euro of revenues from EMECA Members.



Impact concentrates in two leading sectors

Administrative & Support services leads economic impact; Wholesale & Retail trade leads employment

EMECA Members' impact has grown across sectors, particularly in Administrative & Support services (highest economic impact, €8.9 bn) and Wholesale & Retail (highest employment impact 81,258 jobs).



Note: these are merely examples of a few sectors where EMECA Members deliver a significant impact.

04.2

Focus: visitors, exhibitors and tax contribution

Key definitions: visitors and exhibitors

Scope and criteria applied to define participants in the impact analysis



Visitors



Exhibitors

Elements

Scope

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.



Exhibitors

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 visitors

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



International exhibitors

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

Participation patterns drive EMECA Members' impact

Differences between visitors and exhibitors explain how impact is generated across EMECA Members' activities

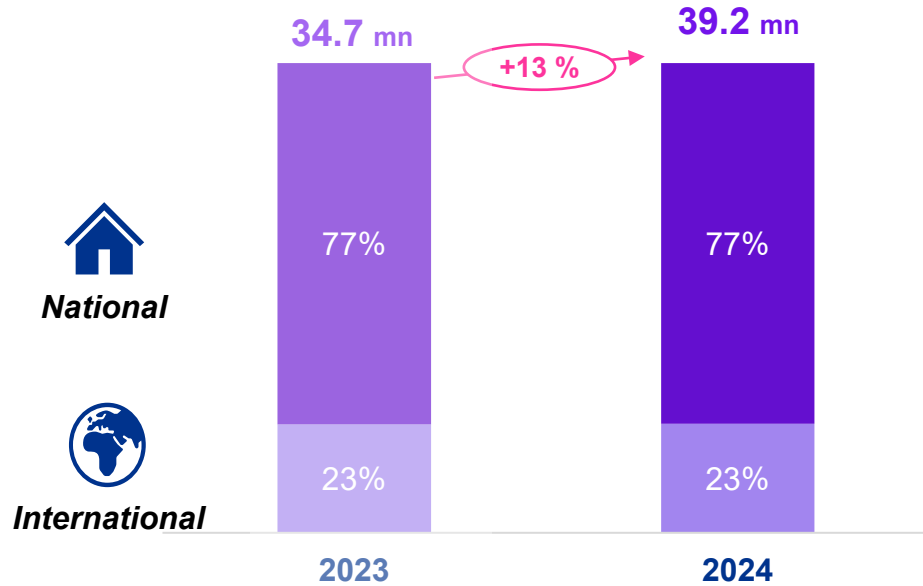


Visitors

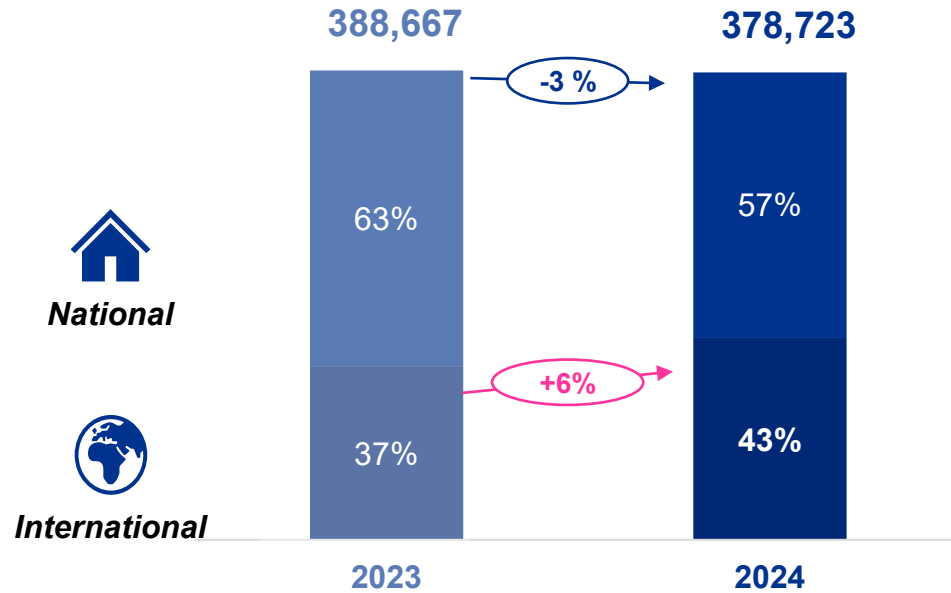


Exhibitors

Total number of visitors per year



Total number of exhibitors per year



Visitor volumes continue to grow (+13%), maintaining a stable international mix (~23%), while the increasing share of international exhibitors (+6%) reinforces exhibitions as a key driver of economic impact in Europe.

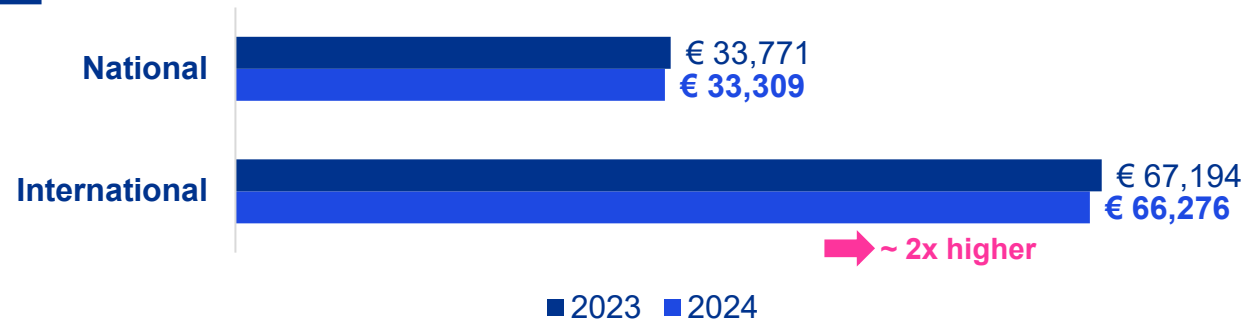
Higher spending per international participant amplifies economic impact

Higher spending per international participant vs. national counterparts

Higher spending per international exhibitors and visitors—particularly in transport and hospitality—drives stronger overall economic impact.



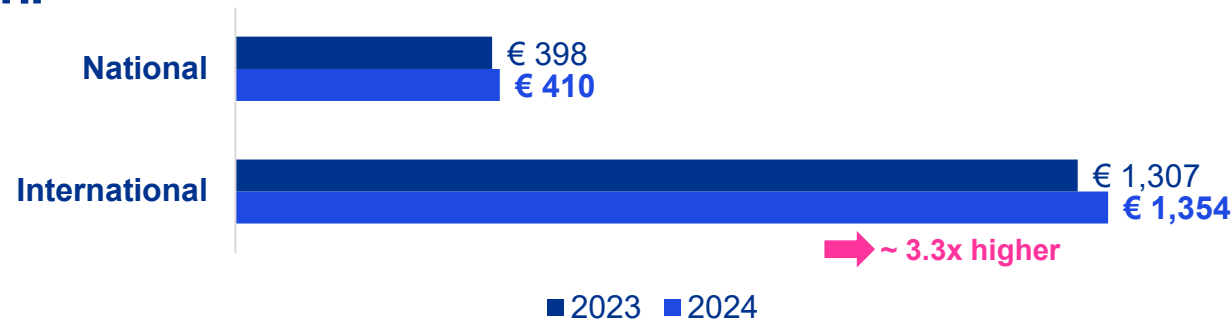
Exhibitor expenditure (€ per exhibitor)



International exhibitors spend ~2x more than national exhibitors, driving higher economic impact.



Visitor expenditure (€ per visitor)



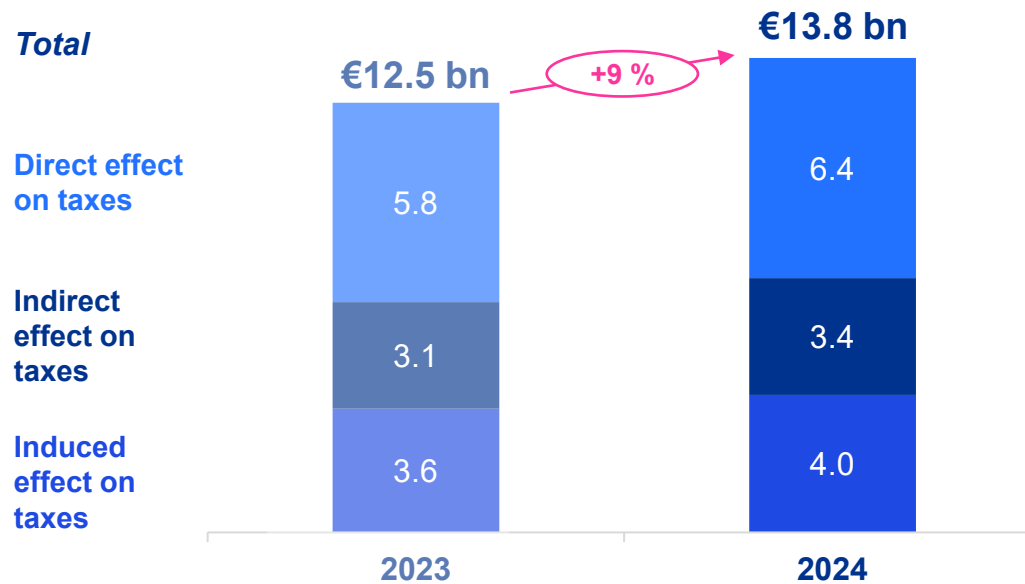
International visitors spend over 3x more than national visitors, driving significantly higher impact.

Tax contributions translate economic activity into measurable impact

Tax effects amplify impact beyond direct payments



Tax-related economic impact (€bn)



Tax-related impact increased by +9% in 2024, reaching €13.8bn.



€6.4bn in direct taxes generated €13.8bn in total economic impact in 2024.

05

Extrapolation: from EMECA to geographical Europe

Visitors and exhibitors drive impact in Europe

Visitors and exhibitors dominate both economic and employment impact

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

Elements	Scope
 Visitors	Captures the impact of visitors' activities, including their expenditures.
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 Investments	Any upgrade or expansion activities, such as refurbishments, construction of new buildings, and similar projects.

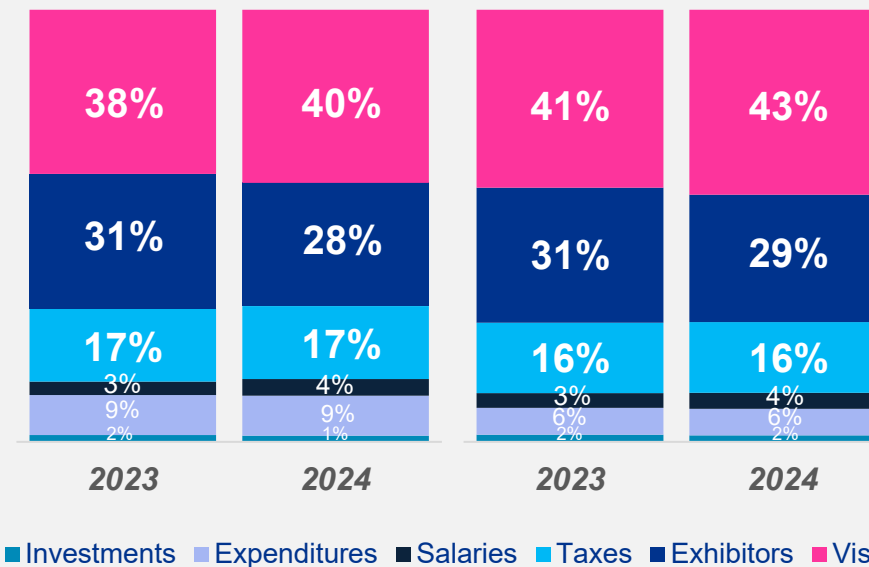
The largest share of the sector's overall impact for geographical Europe **arises from 'Visitors' and 'Exhibitors'**, in terms of both economic and employment impact, followed by 'Taxes'.



Economic impact



Impact on employment

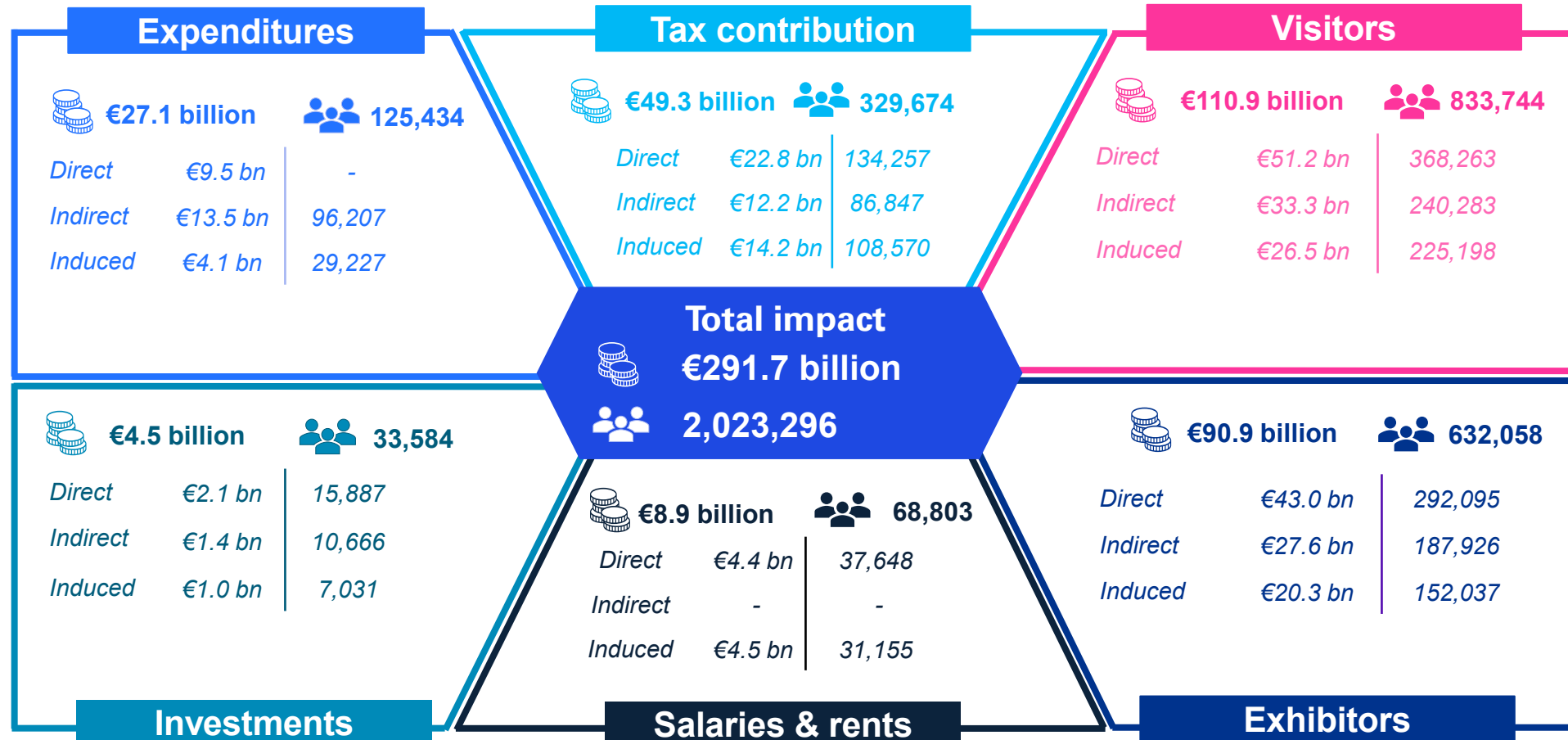


Note: Please, refer to the methodological annex of this document for more information on this calculation.

Sources of economic impact

European exhibition sector. Focus 2023

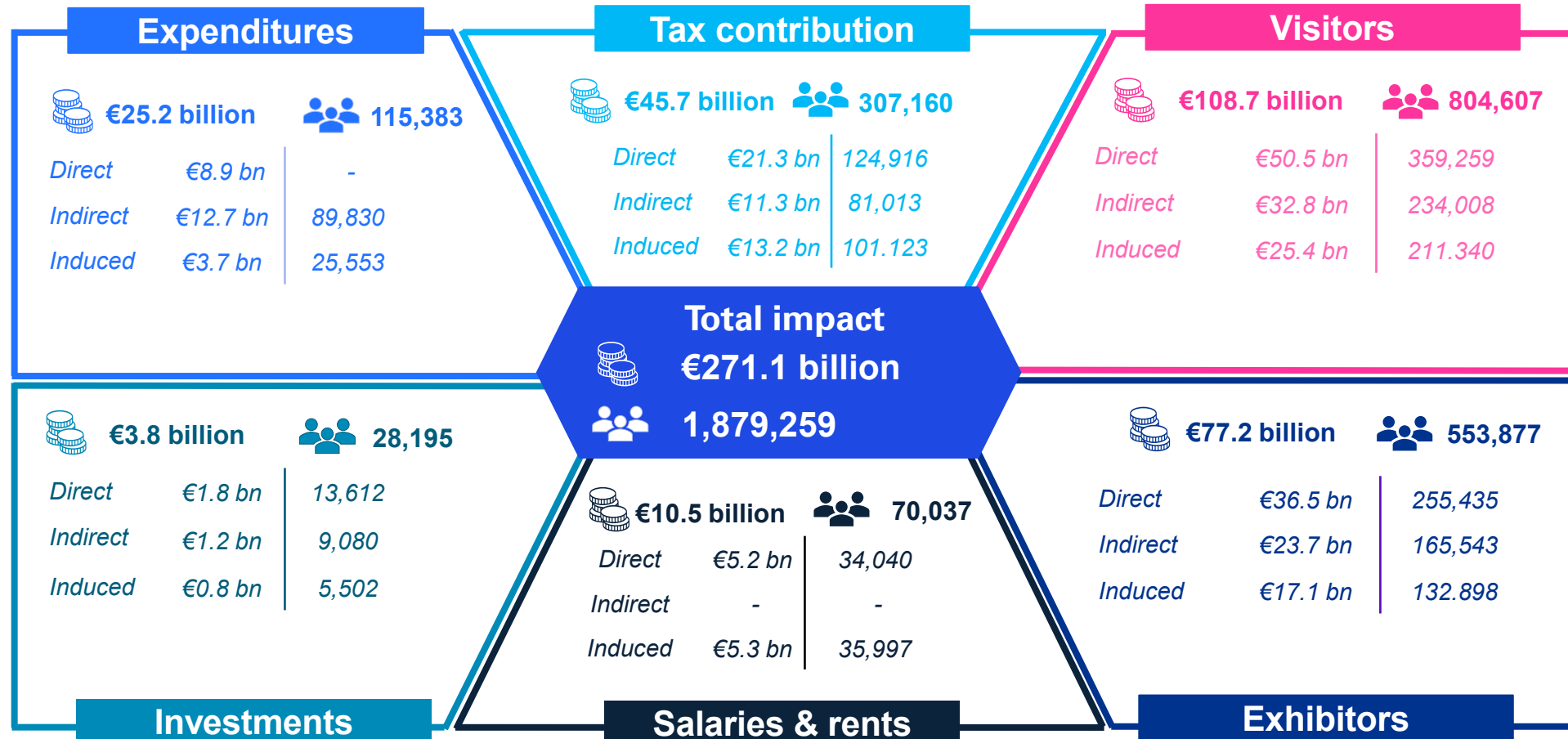
The graph below shows how economic impact is generated across its six main drivers, including expenditures, visitors and exhibitors.



Sources of economic impact

European exhibition sector. Focus 2024

The graph below shows how economic impact is generated across its six main drivers, including expenditures, visitors and exhibitors.



Participation patterns drive impact in Europe

Differences between visitors and exhibitors explain how impact is generated across the exhibition sector

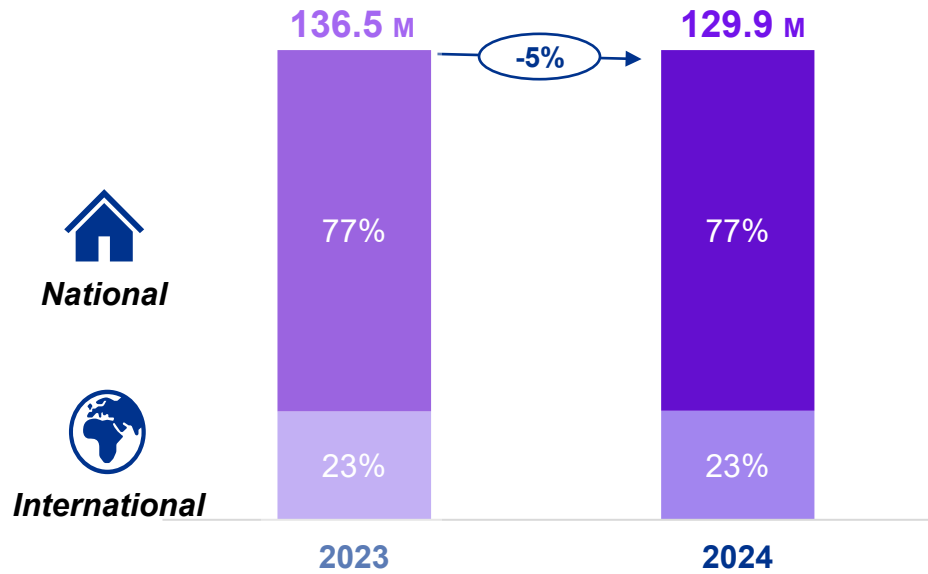


Visitors

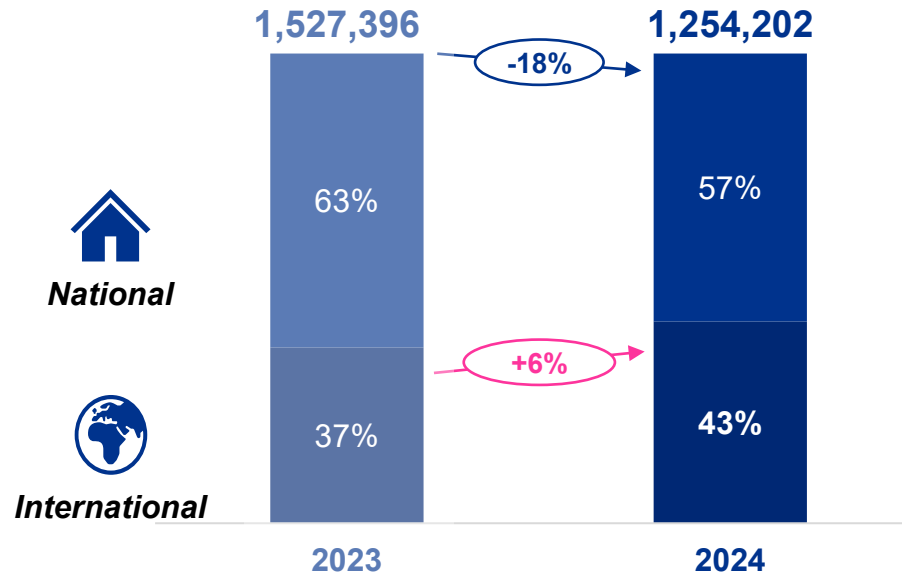


Exhibitors

Total number of visitors per year



Total number of exhibitors per year



An 'international visitor or exhibitor' means any visitor or exhibitor coming from other European countries (excluding the venue's home country), or from any other country elsewhere in the world.



International participation is stable among visitors (~23%) but increasing among exhibitors (+6%), reinforcing exhibitions as a driver of cross-border activity in Europe.

Economic impact materialising across key sectors

Administrative & Support services and Wholesale & Retail trade concentrate the largest spillover effects, driving significant value and employment in Europe



Administrative & Support services

Sector impact in Europe

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.

Nearly **€30 billion** and more than **180,000 jobs** in the “*Administrative services*” industry.

in this industry, the European exhibition sector generates...



Economic Impact (€bn)

€30.2 bn	2023
€29.4 bn	2024



Employment impact (No. employees)

199,144	2023
184,420	2024



Wholesale & Retail trade

Sector impact in Europe

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

€26.5 billion and close to **270,000 jobs** in the “*Wholesale & Retail trade*” industry.

In this industry, the European exhibition sector generates...



Economic Impact (€bn)

€28.8 bn	2023
€26.5 bn	2024



Employment impact (No. employees)

289,969	2023
269,099	2024



The European exhibition sector creates a significant impact on other associated activities and industries.

Europe's exhibition industry at scale

A major economic and employment footprint, with EMECA Members as key drivers

As a whole, the exhibition industry in Europe has generated the following impacts:

Total economic impact of the sector in Europe

2023

€ 291.7 billion

2024

€ 271.1 billion

Greater than Greece's GDP in 2024⁽¹⁾.

Total impact on the employment of the sector in Europe

2023

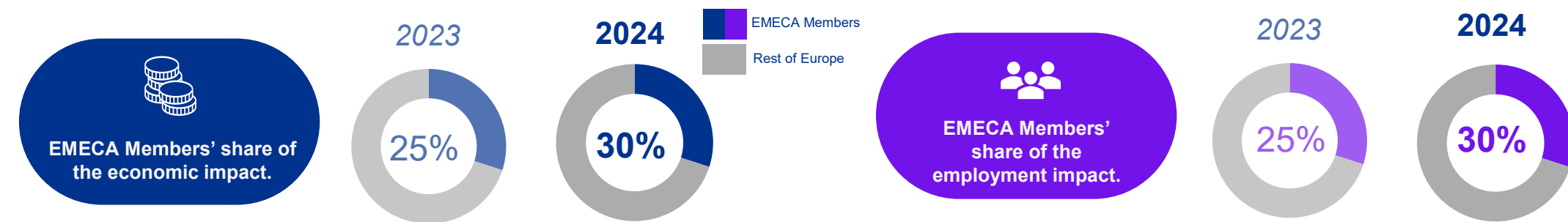
2,023,296

2024

1,879,259

Similar to the entire population of Warsaw⁽²⁾.

EMECA Members generate nearly one third of the overall impact of the exhibition industry in geographical Europe, as explained in further detail on the following pages.



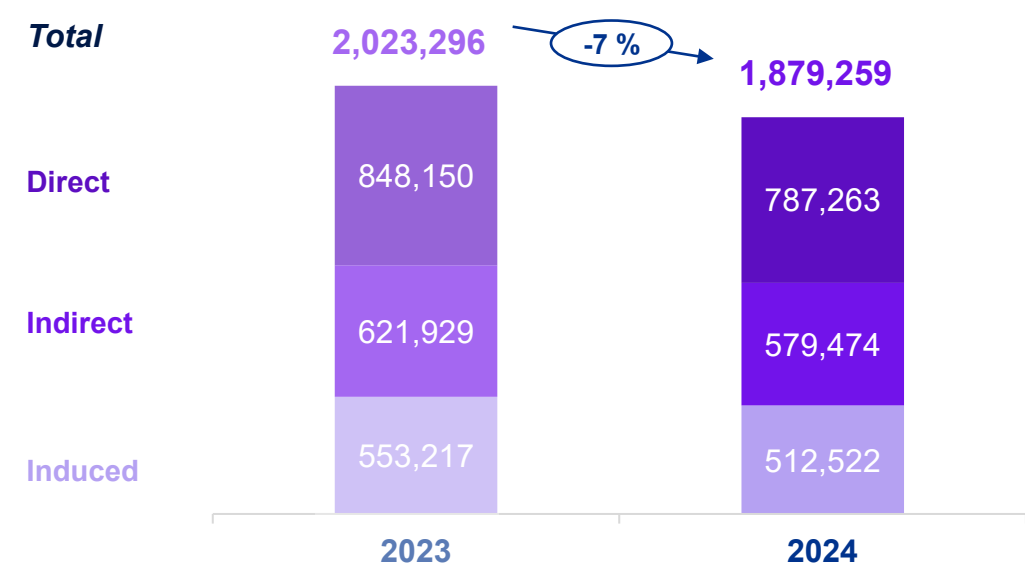
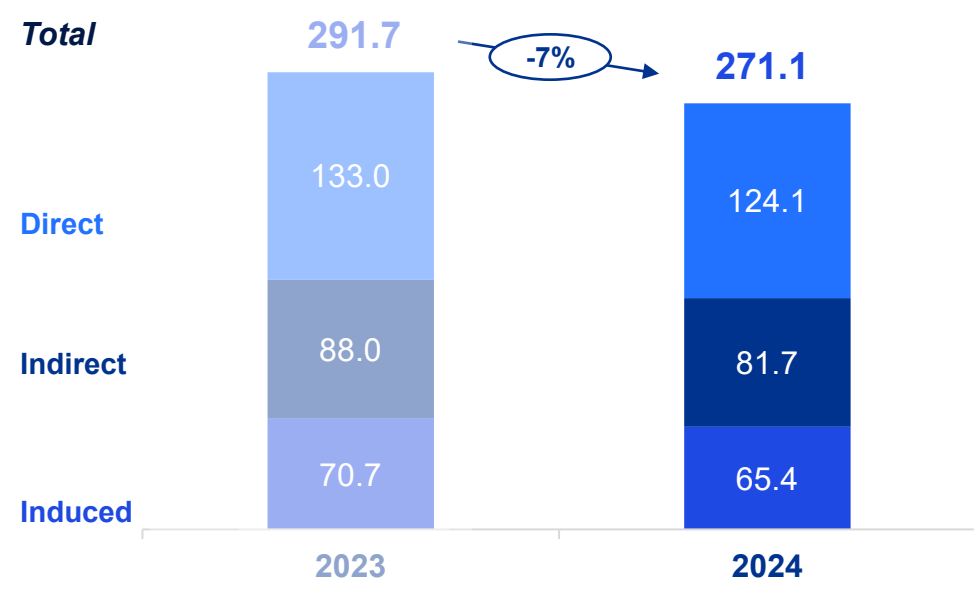
(1) Source: World Bank 256,24 billion current USD, equals to approximately 220 billion € on a USD-EUR exchange rate of 0.86. ; (2) Source: World Population Review.

Strong impact of the European exhibition sector

Maintaining a significant economic and employment footprint over time

Economic impact of the sector in geographical Europe (€bn)

Impact of the sector on employment in geographical Europe (people)



The lower extrapolated European impact in 2024 compared to 2023 is driven by the change in the extrapolation factor: while EMECA Members' revenues grew between 2023 and 2024, European revenues remained stable. Consequently, the extrapolation factor was lower in 2024 than in 2023.

The sector sustains a €271.1 bn economic impact and ~1.9 million jobs in 2024, even with a ~7% adjustment vs. 2023.



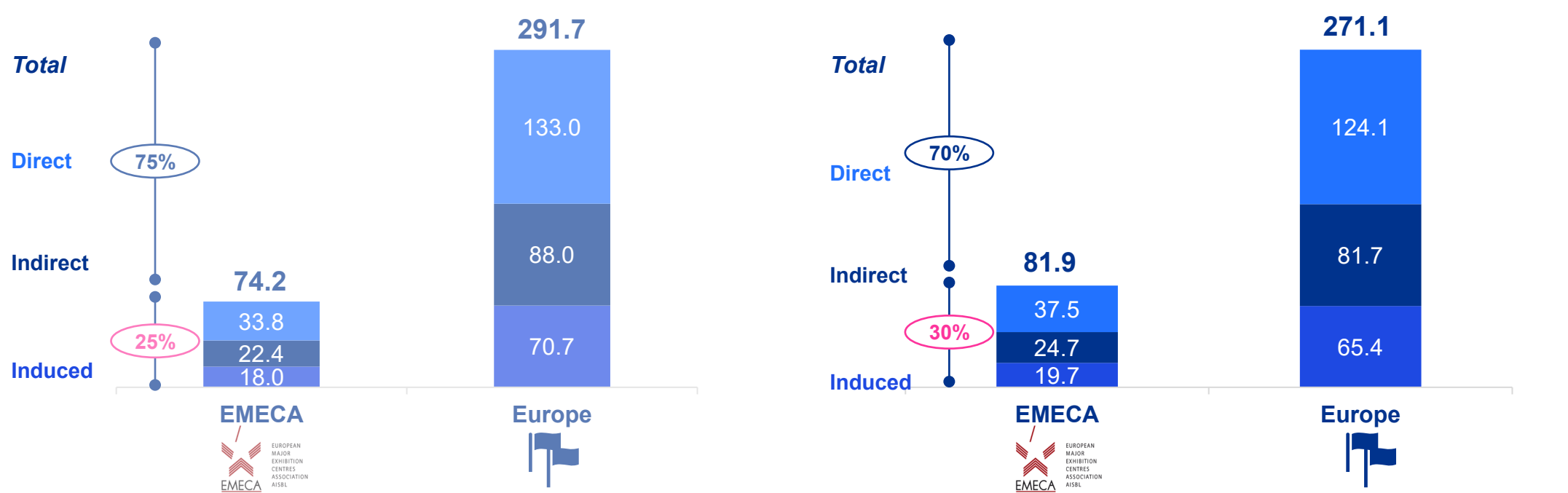
EMECA Members, key actors in Europe

EMECA Members represent a significant share of the sector's economic impact in Europe

Economic Impact (€bn)

2023

2024



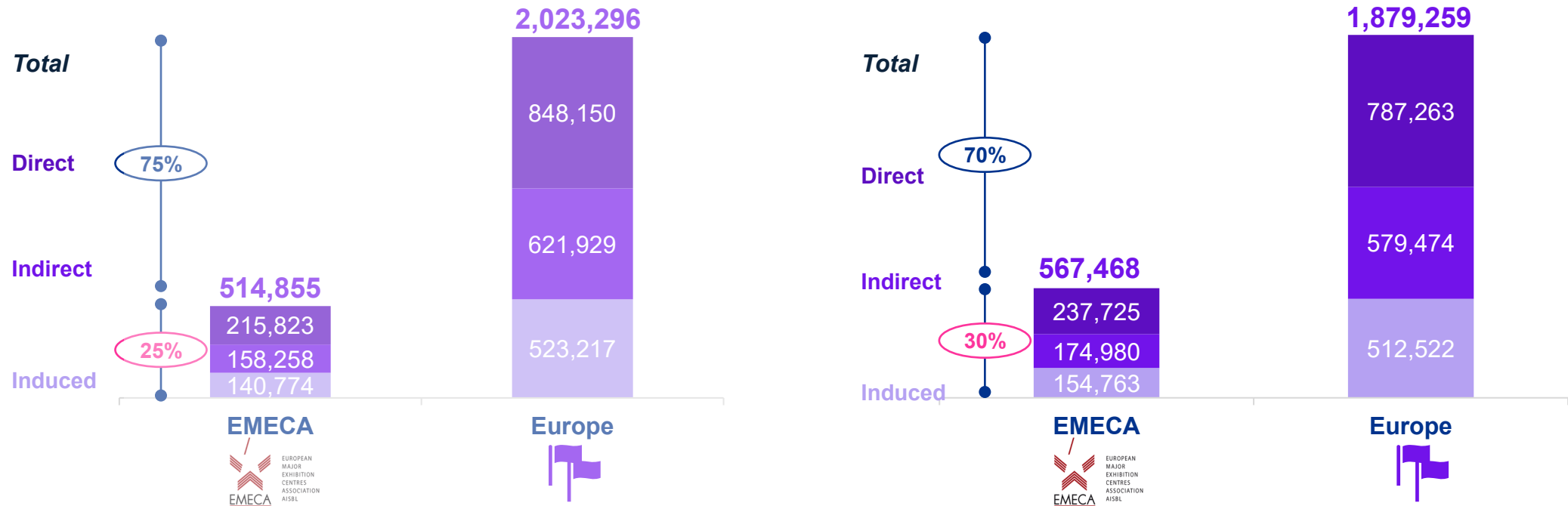
EMECA Members generate ~30% of total economic impact in 2024.

EMECA Members, key actors in Europe

EMECA Members represent a significant share of employment impact across the sector

Employment impact (people)

2023 2024



EMECA Members generate ~30% of total industry jobs in 2024.

06

Annex: methodology

Methodology: impact calculation

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:

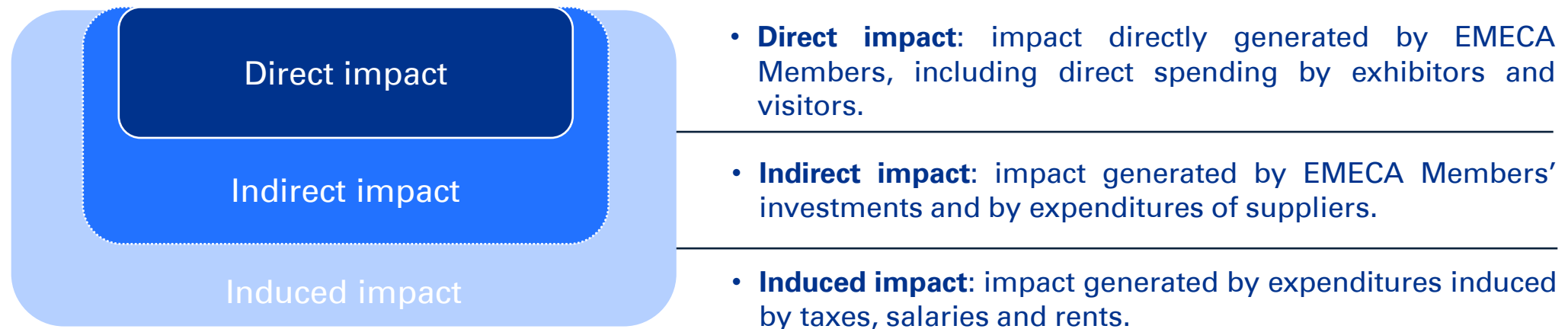
$$X=(I-A)^{-1} DF$$

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: impact calculation

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: impact calculation

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: impact calculation

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.

Methodology: data extrapolation

For the extrapolation to geographical Europe, KPMG has used revenues as the reference variable. Specifically, it has considered the economic revenues of EMECA Members. This ensures that the extrapolation is consistent with the economic relationship between EMECA Members and the European market.

Particularly, the extrapolation is based on the ratio between total European revenues and EMECA Members' revenues, which results in an extrapolation factor of 3.9 in 2023, and 3.3 in 2024. These factors are then applied uniformly across all impact categories (production, added value, and employment). In this regard, it is worth noting that revenue is the most relevant anchor variable to perform this extrapolation from an economic standpoint.

The lower extrapolated European impact in 2024 compared to 2023 is driven by the change in the extrapolation factor: while EMECA Members' revenues grew between 2023 and 2024, European revenues remained stable. Consequently, the extrapolation factor was lower in 2024 than in 2023.

Regarding the role of visitors and exhibitors, note that it does not directly enter the extrapolation calculation. It only has an indirect influence, through its effect on the EMECA Member's impact figures. Therefore, changes in visitor/exhibitor figures are not the reason why the European impact is lower in 2024.

Disclaimer:

*The aforementioned estimated data is meant to most accurately represent the true impact of EMECA. However, since some Members were unable to provide the information, **it is by no means an exact figure**, and therefore, should not be interpreted as such. **This data is meant for illustrative and communicative purposes only. It does not constitute a formal and official declaration or disclosure of any type**, and neither KPMG nor EMECA may be held accountable for the misinterpretation or misuse of this information.*

KPMG

