

Reading guide: anatomy of winning pavilions.

Expo 2025 in Numbers is designed as a forward-looking thesis to help guide your strategy for Belgrade 2027, Riyadh 2030, and beyond.

By synthesising 30 years of research into actionable frameworks, we have aimed to transform raw statistics from Expo 2025 and other Expo's into a framework for success.

This means that, apart from being a useful collection of data, this report hopefully also serves as a "workshop on paper" — providing the conceptual foundation and shared language to which you can add your own insight and experiences, to align your stakeholders.

The diagram helps you navigate the different parts of the report: it visualises our view of how Expo

success comes from resilient leadership, combining creative brilliance with a clear view of the operational reality that the Expo offers.

“Success requires managing the tension between Creative Idealism and Operational Pragmatism from Day 1.”

To translate this conceptual foundation into a live project roadmap, please refer to our Workshop Series framework (p.27), which details the practical steps for applying these insights to your specific national goals for the next Expo project.

BUILDING A SUCCESSFUL PAVILION REQUIRES MANAGING THE TENSION BETWEEN CREATIVE IDEALISM AND OPERATIONAL PRAGMATISM, NOT AVOIDING IT.



Expo's in Numbers: Who are THEY?

THEY VISUALIZE VALUE is a creative leadership communications agency with offices in Amsterdam and Delhi. Founded by Tjaco Walvis and Jolene Prins, THEY help visionary leaders and nations communicate ideas and philosophy at scale. The agency combines strategy, storytelling, and design to inspire the people that matter most: citizens, customers, investors, and communities.

For over three decades, the team behind THEY has been deeply involved in world expositions. Long before the agency's founding, this tradition began with Tjaco Walvis, who led pioneering research, supported by Alfred van Bunge and Tjeerd Walvis at Expo '92 in Seville.

The work continued through Expo 2000 in Hannover and by visiting subsequent Expos, and now at Expo 2025 Osaka. Our studies have established one of the most comprehensive independent archives on World Expositions — documenting how nations express identity, innovation, and cooperation through architecture, storytelling, and experience design. That legacy continues with this report on Expo 2025 under our long-running series "Expos in Numbers".

Today, these reports have become reference works for governments, architects, business leaders, and cultural policymakers around the world.

They combine data, insight, and narrative to show how Expos shape our collective imagination, and how ideas presented on a global stage can influence societies long after the gates close.

It has been a true pleasure for us to work on this report and we hope you will find it of value in evaluating your Osaka pavilion and plan for your next Expo participation!

THEY's Expo in Numbers Team

01 **Mohit Manchanda** led the project execution, overseeing operations, management, and data analysis.

02 **Jolene Prins** worked at the Dutch pavilion at Expo 2000 Hannover, Content, finance & operations

03 **Coen van Bunge** followed in the footsteps of his father and visited his first Expo as a Researcher

04 **Tjeerd Walvis** visited all world Expo's since 1992, Research and consultant.

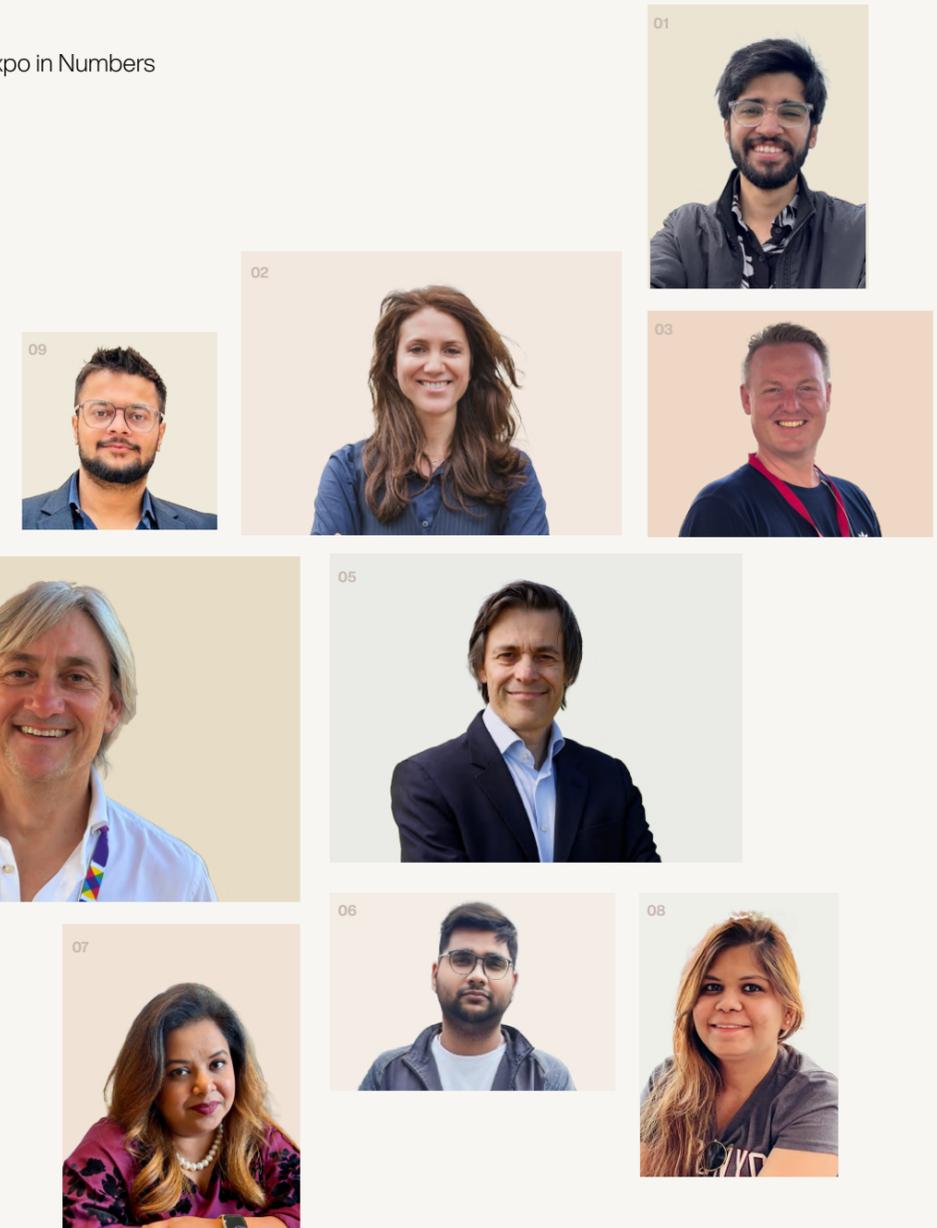
05 **Tjaco Walvis** led our third Expo in Numbers report — and not his last.

06 **Vansh Panwar** crunched the numbers until the small hours of the night as Finance & data analyst

07 **Gini Singh** supervised the design workflow.

08 **Varsha Sharma** took the creative lead and crafted the visual identity of the report.

09 **Shivam Aggarwal** conducted pavilion research and curated the collection of beautiful images featured throughout.



**THEY
VISUALIZE
VALUE,**
Amsterdam | New Delhi

Note
We have done our utmost to provide reliable data. However, for this we have relied on participating countries and the Expo organisers. THEY does not accept responsibility for the accuracy of individual figures presented in "Expo 2025 Osaka in Numbers."

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At Expo's, nations show their solutions for the issues of humanity.

At Expo 2000 Hannover, the primary goal for 73% of participants was to "enhance our national image." Only 9% mentioned goals related to the Expo theme. In our Hannover research, therefore, commissioners stressed it was critical to make **Expos** more **thematic** to keep them relevant.

Fast forward to Expo 2025 Osaka, and this has become a reality. Around 71% of participants mentioned their primary goals were **Expo-theme-related** or were a mix of targets related to nation branding and the Expo 2025 theme, "Designing Future Society for Our Lives."

Our analysis shows that of the 48 independent pavilions, only 29% were purely focused on national branding.

Today, the purpose of world expositions is to foster understanding among the people of the world by bringing them together, and to showcase solutions to a global issue facing mankind. Most pavilions have linked their goals to this purpose.

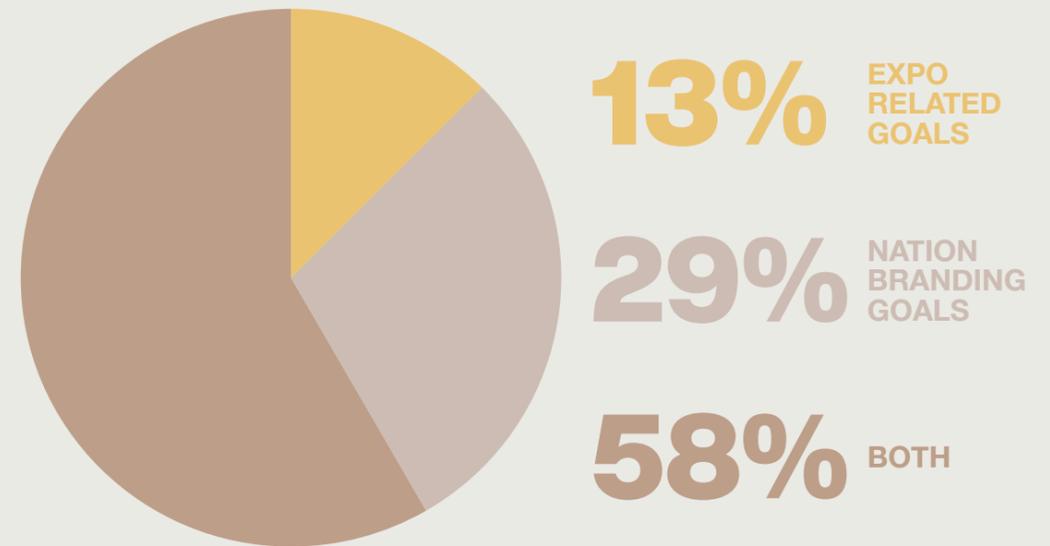
There is more that unites than divides us

This signals a major cultural change. It makes world expositions one of the few global platforms where citizens of the world come together as people, rather than as adherents of certain political interests, religious practices, cultural backgrounds, etc. People meet as people and discover that in the end, there is more that unites than divides us and that our fates are interlinked.

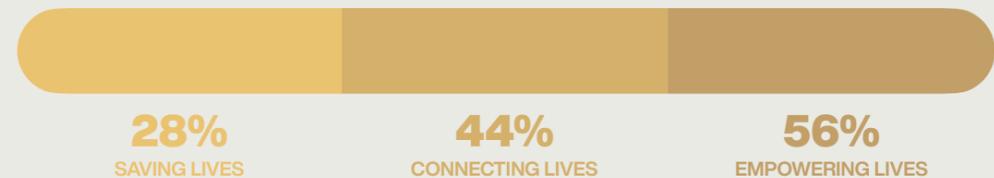
Many countries used their pavilions to showcase how they address and solve the challenges that humanity faces. They showcased local innovations with shared human value. This evolution, from just country promotion to shared solution promotion, is what defines the modern Expo.

"This evolution, from just country promotion to shared solution promotion, is what defines the modern Expo."

FOR 58% OF COUNTRIES AT EXPO 2025, THE PRIMARY GOALS WERE A MIX OF TARGETS RELATED TO BOTH NATION BRANDING AND THE EXPO THEME



EXPO RELATED GOALS*



*Country pavilions were located in these three thematic zones. However, they could still select **multiple Expo-related targets** regardless of their zone.

Note: Percentages represent the share of countries that identified *Expo-related goals* as a priority (in the pie chart). This group comprises 71% of the total participants (combining the "Expo-related" and "Both" categories).

NATIONAL BRANDING GOALS*



*Country pavilions could select multiple national branding goals.

Note: Percentages represent the share of countries that identified National Branding as a priority (in the pie chart). This group comprises 87% of the total participants (combining the "Nation Branding" and "Both" categories).

Countries believed an independent pavilion offered more room to tell their story.

“Building yourself, or joining a common pavilion?” is the most consequential question pavilion teams need to answer. Everything depends on it, from the ability to achieve goals and operational complexity to budget, preparation time, staffing, etc. The reasons why countries chose to build their own pavilions in Osaka were creative and strategic and mostly related to communications, diplomacy, and visitor capacity.

Creative considerations

An independent pavilion offers greater creative freedom, more room for storytelling, and stronger differentiation. It allows the outside promise and the inside experience to speak with one voice.

Strategic considerations

Self-built pavilions can be designed for higher daily capacity, planned for post-Expo re-use, and configured for better value over the project’s full life. Diplomatic considerations often weigh the most heavily. The host and the global audience expect certain nations, G7 members among them, to present a stand-alone pavilion. Through the identity of the building, the pavilion becomes a statement of stature as much as a platform for ideas.

An independent pavilion gives commissioners full control of the message — from architecture to operations. Naturally, this raises the bar on budget and execution. Once a pavilion is bespoke, the leadership must actively manage the creative and operational trade-offs so the core idea survives procurement, construction, and opening day to achieve the team’s goals.



“An independent pavilion gives commissioners full control of the message - from architecture to operations.”

BUILDING YOUR OWN PAVILION OFFERS CREATIVE AND STRATEGIC BENEFITS*

GREATER CREATIVE FREEDOM

75%

NATIONAL TRADITION

60%

DIPLOMATIC OR STRATEGIC VISIBILITY

60%

DIFFERENTIATE FROM OTHERS

45%

POST-EXPO REUSE POTENTIAL

45%

MORE STORYTELLING SPACE

35%

LARGER CAPACITY FOR VISITORS

15%

OTHER

15%

COST-BENEFIT REASONS

5%

*Total of the percentages doesn't add up to a 100% because countries could select multiple options.