

Results of the Second

Global Economic Crisis Barometer

Survey of the Exhibition Industry

conducted among
UFI * & SISO ** Members

(*) World (**) USA

Survey Framework



The impact of the current economic downturn on the exhibition business is of key interest to all.

At the beginning of 2009, UFI decided to assess the impact of the situation by developing a “Crisis Barometer” based on the perceptions of our UFI members in 83 countries and including for the USA, an identical survey conducted by SISO (Society of Independent Show Organizers) of its members. The first results of this quarterly survey were published in February 2009.

The current document presents the results of the second “Crisis Barometer” survey, conducted in April/May 2009. Many of the questions were different from the first edition, since not all questions were deemed to require evaluation on a quarterly basis. For this reason, the trends analysis will be conducted on the next survey’s results (in July 2009).

This second edition of the survey includes answers from AFIDA (Asociacion International de Ferias de America) members from Central & South America. Answers per country/region are mentioned at the end of this document.

For questions related to this survey, please contact research@ufi.org.

Executive Summary

For shows occurring between 1 October 2008 and 31 March 2009:

- **Around 7 companies out of 10 experienced a decrease in space sales** (68% for B2B shows and 71% for B2C shows); **the other companies maintained or increased their sales.**
- The situation regarding visitors/attendees is similar, except for participation in B2B shows which appeared better (“only” 62% experienced a decrease)
- **“Real estate”** (for both B2B and B2C shows) is considered the most affected sector, just ahead of **“construction & public works”** (B2B) and **“Textile, clothing, fashion, etc.”** (B2C)
- Generally speaking, the Middle East region seems the least affected.

79% of companies anticipate a decrease in turnover for the first half of 2009 (compared to the first half of 2008).

- This percentage varies from 70% (MEA) to 84% (Americas)
- The scale of the decrease is most often “between 5 and 10%” and “between 10 and 25%”

Almost 1 company out of 2 initiated discounts (except in MEA where only 15% did so). The discount usually is, on average, less than 10%. **Other specific measures were taken by 64% of companies.**

84% to 92% of companies (however only 62% in the MEA) **undertook or plan to undertake meaningful cost reductions in their operations.** These are estimated at “less than 10%” for around half of them, and “10% or above” for the other half.

Detailed results

B to B shows

- Space sales
- Visitors/attendees
- 5 Sectors most affected

B to C shows

- Space sales
- Visitors/attendees
- 5 Sectors most affected

Turnover for the first half of 2009

Discounts to customers?

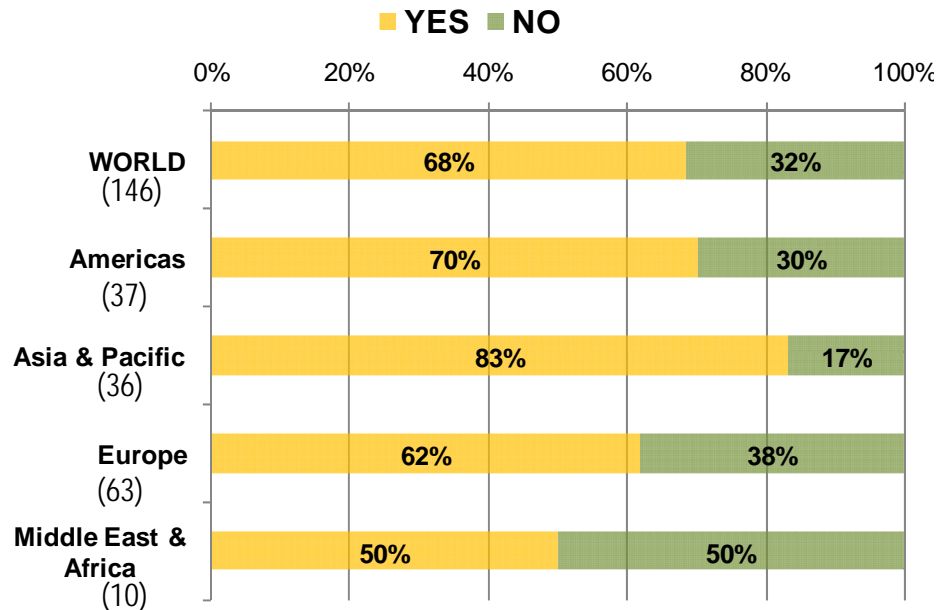
Other specific measures for customers?

Cost reductions?

Number of answers per country/region

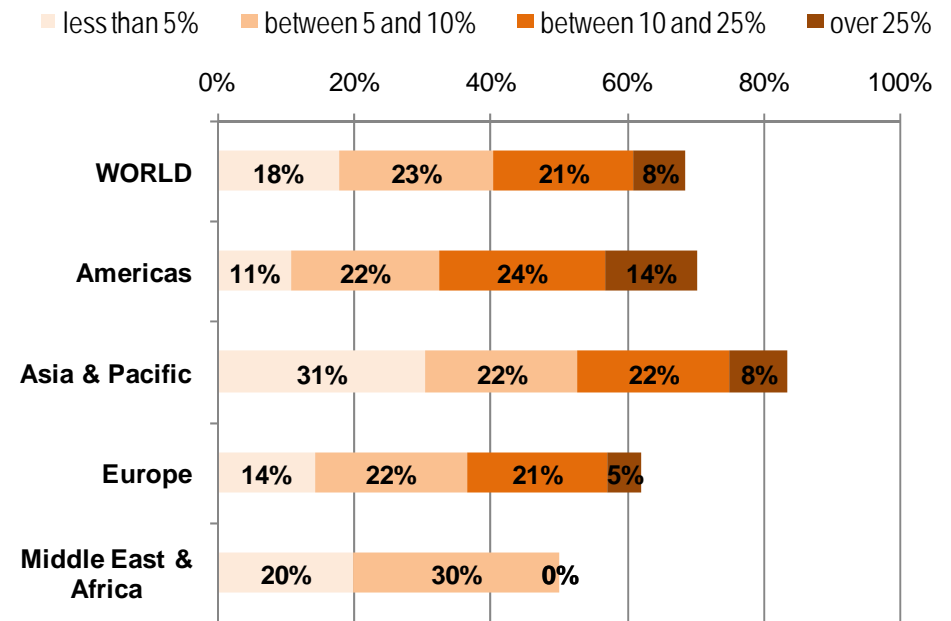
1. For shows occurring **between 1 October 2008 and 31 March 2009**, did your organization experience a **decrease in space sales in B2B shows**?

Replies (146 in total)



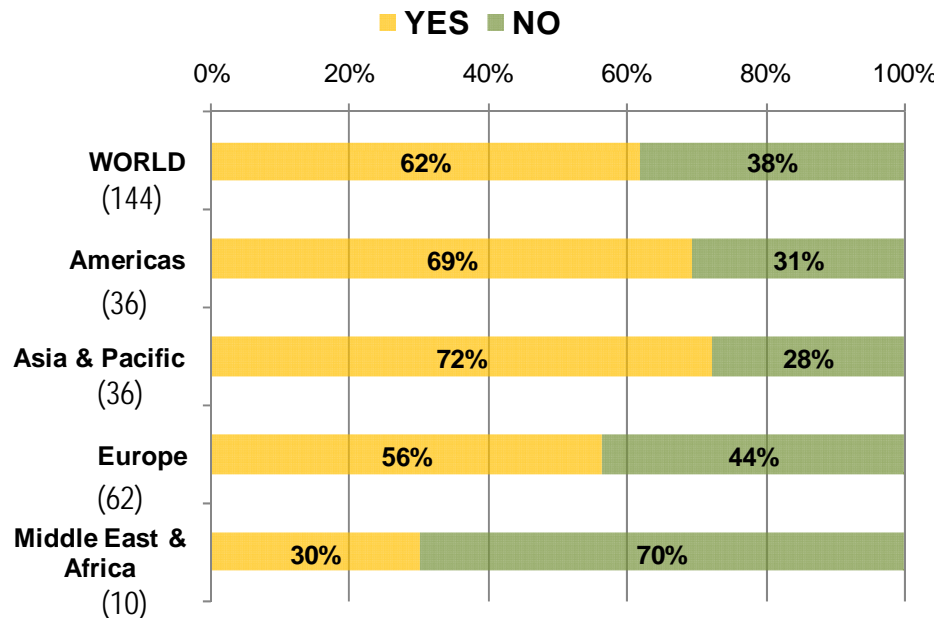
If “YES”, % of decrease?

Replies from the 100 companies concerned



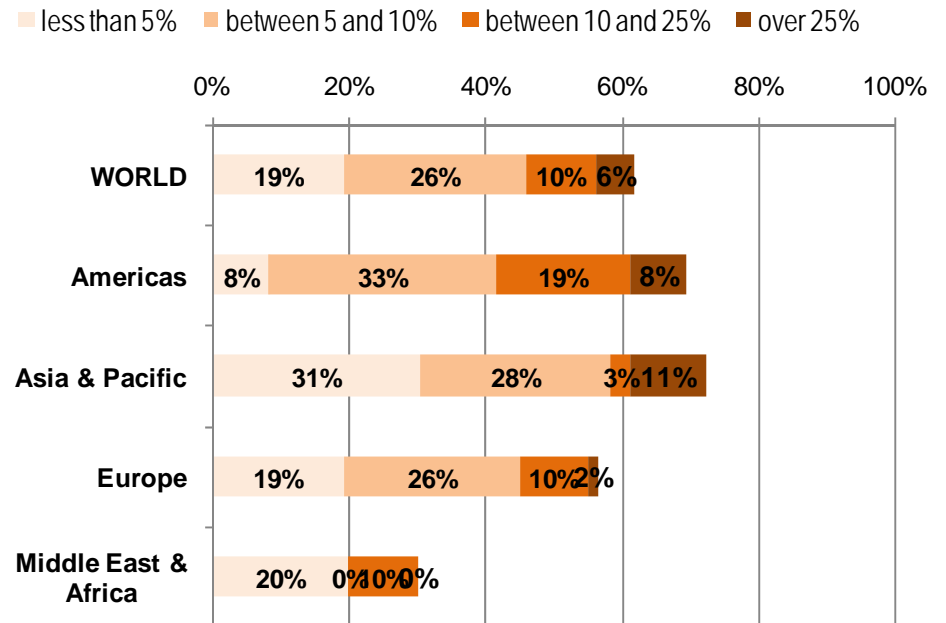
2. **Between 1 October 2008 and 31 March 2009, did you experience any decrease in visitors/attendees for these B2B shows?**

Replies (144 in total)



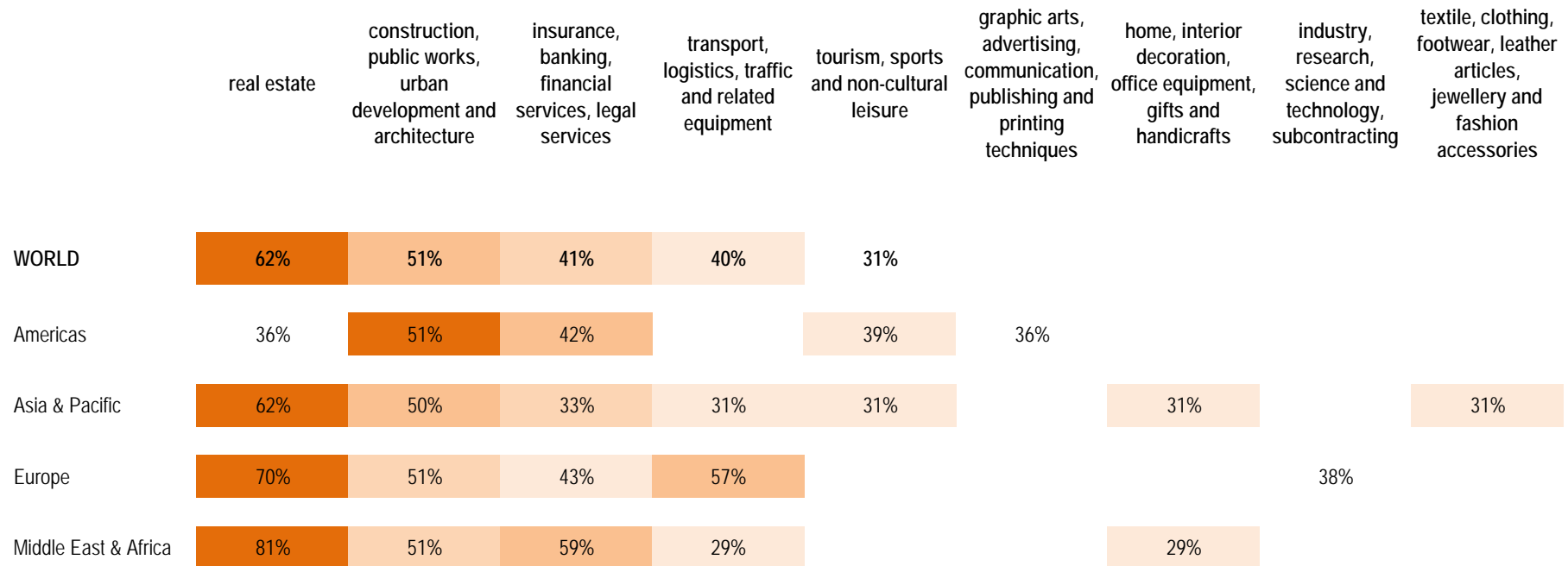
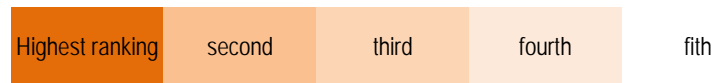
If “YES”, % of decrease?

Replies from the 89 companies concerned



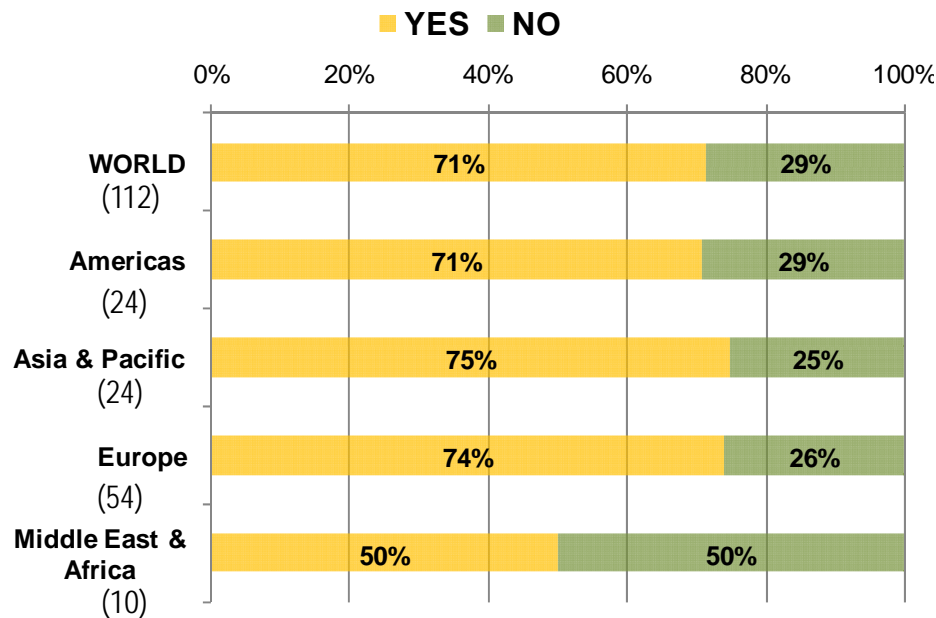
3. In your opinion (regardless of your activities) which 5 sectors of B2B shows are the most affected by the economic crisis?

Ranking (with % of answers for each of the 5 choices)



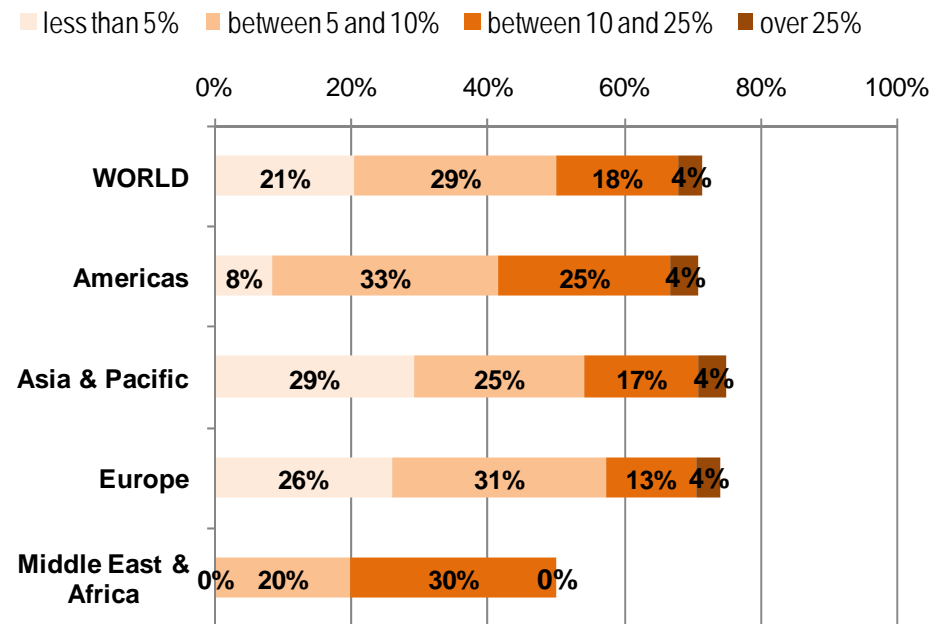
4. For shows occurring **between 1 October 2008 and 31 March 2009**, did your organization experience a **decrease in space sales in B2C shows?**

Replies (112 in total)



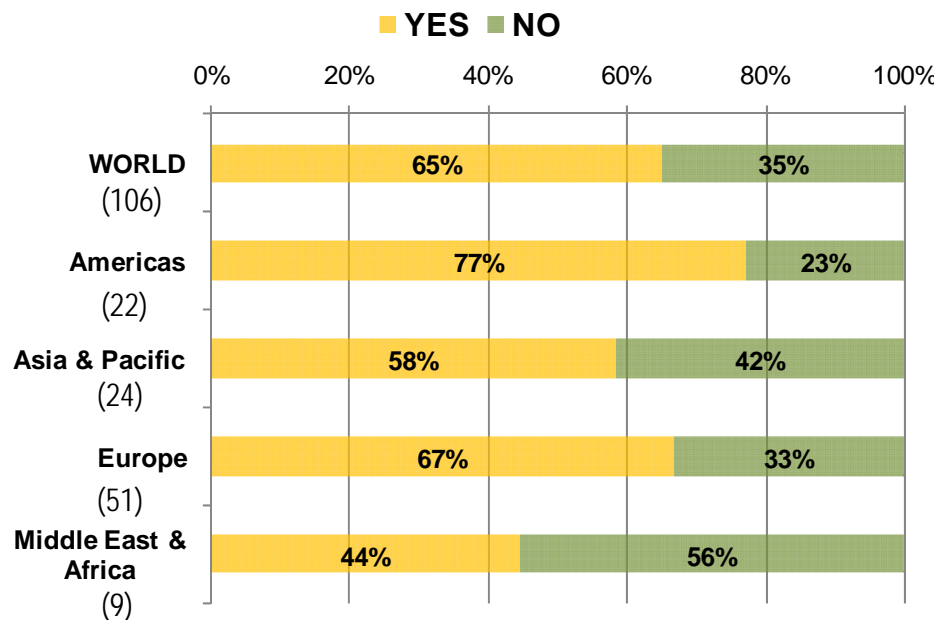
If “YES”, % of decrease?

Replies from the 80 companies concerned



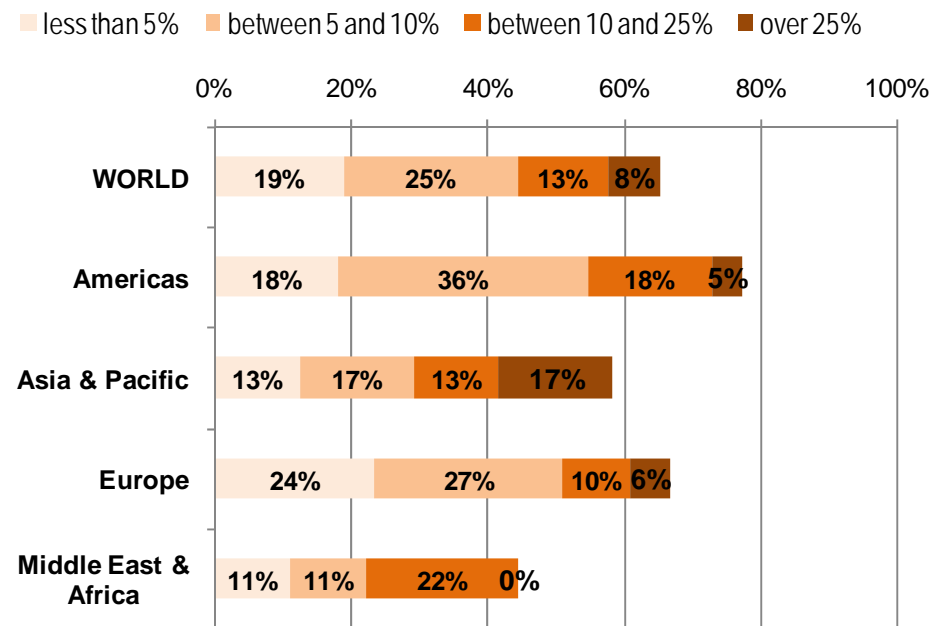
5. For B2C shows occurring between 1 October 2008 and 31 March 2009, did you experience any decrease in terms of visitors/attendees?

Replies (106 in total)



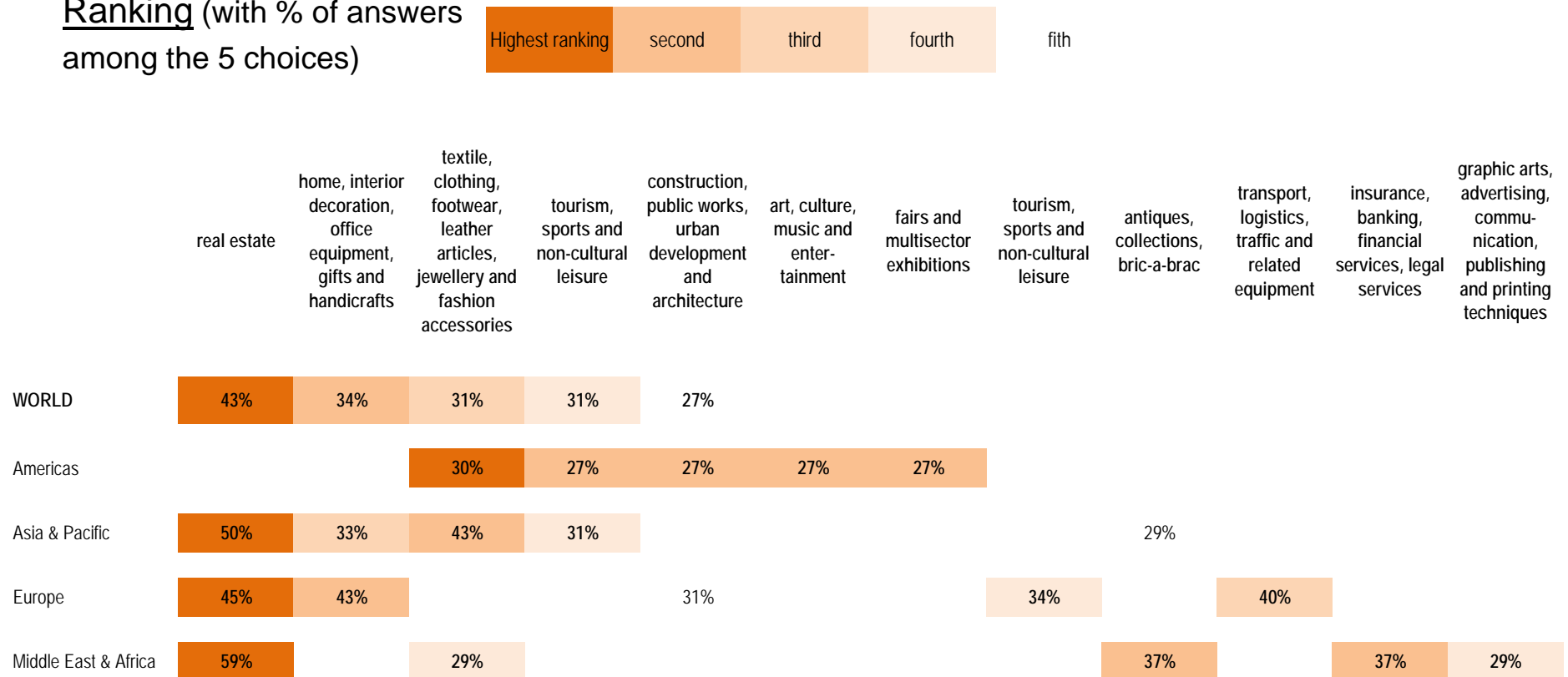
If "YES", % of decrease?

Replies from the 69 companies concerned



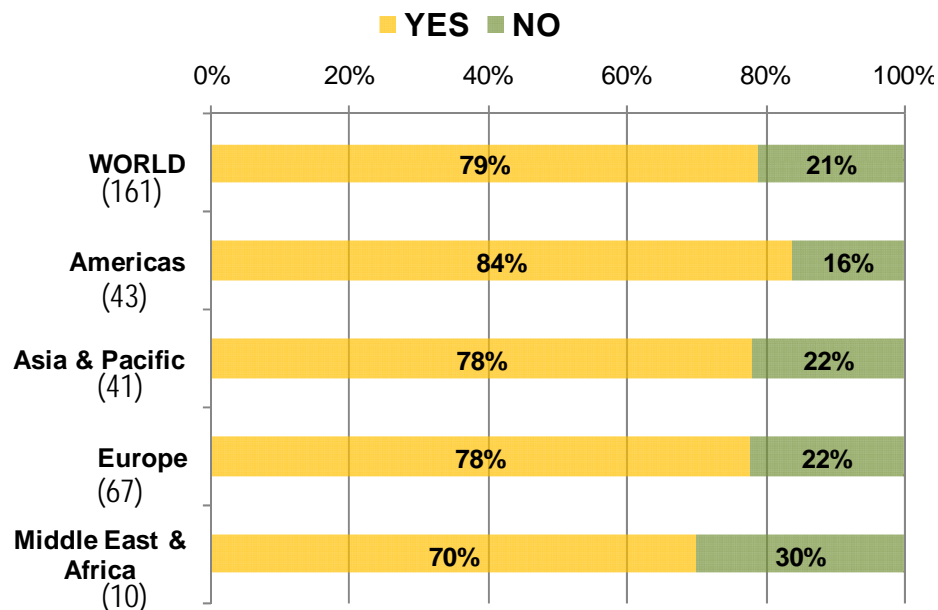
6. In your opinion (regardless of your own activities) which 5 sectors of B2C shows are the most affected?

Ranking (with % of answers among the 5 choices)



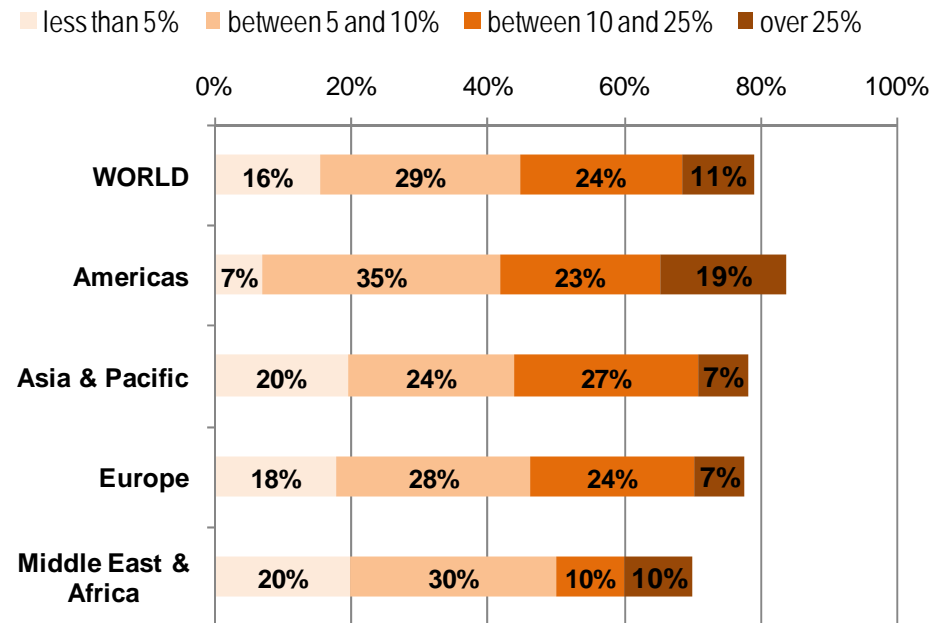
7. Are you anticipating a decrease in gross turnover in the first half of 2009 when compared with the first half of 2008?

Replies (161 in total)



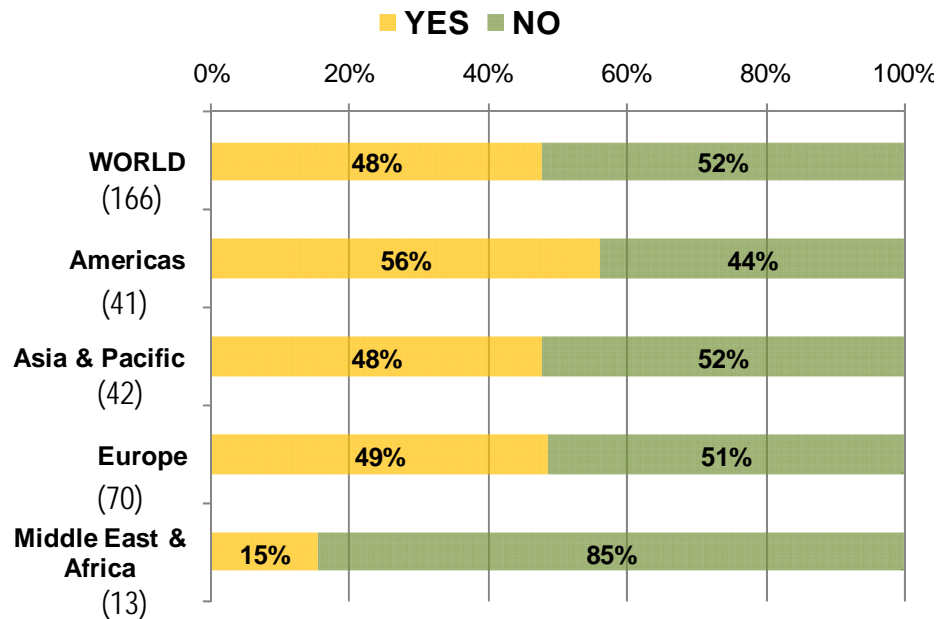
If “YES”, % of decrease?

Replies from the 127 companies concerned



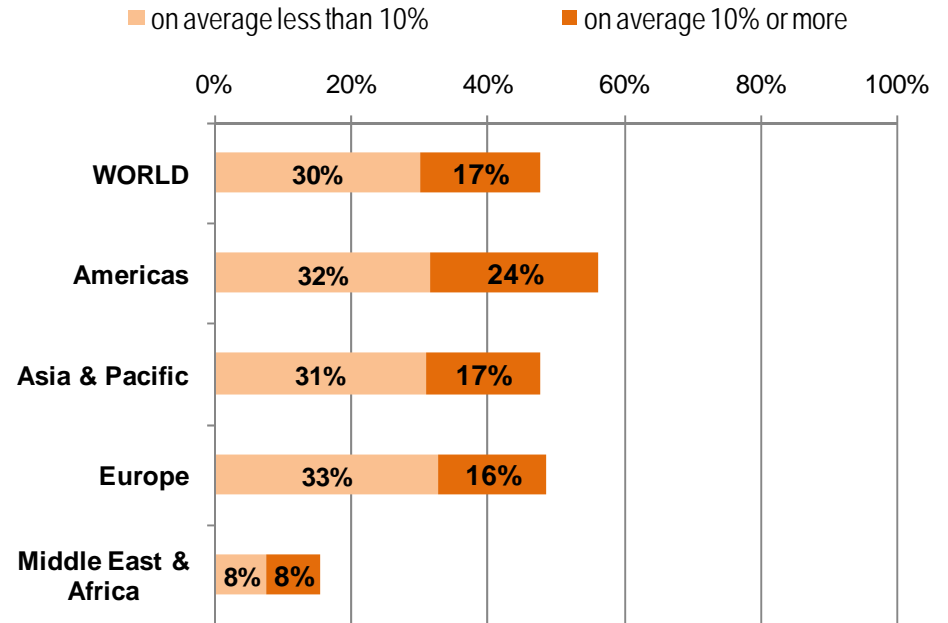
8. Have you (or your company) initiated **discounts** to respond to your customers' needs related to the economic downturn?

Replies (166 in total)



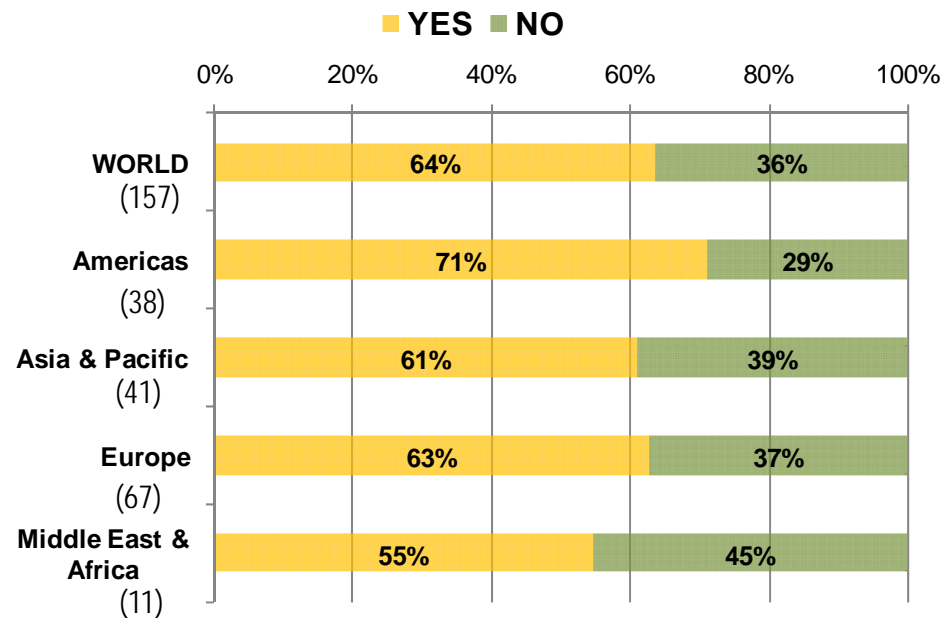
If "YES", % of decrease?

Replies from the 79 companies concerned



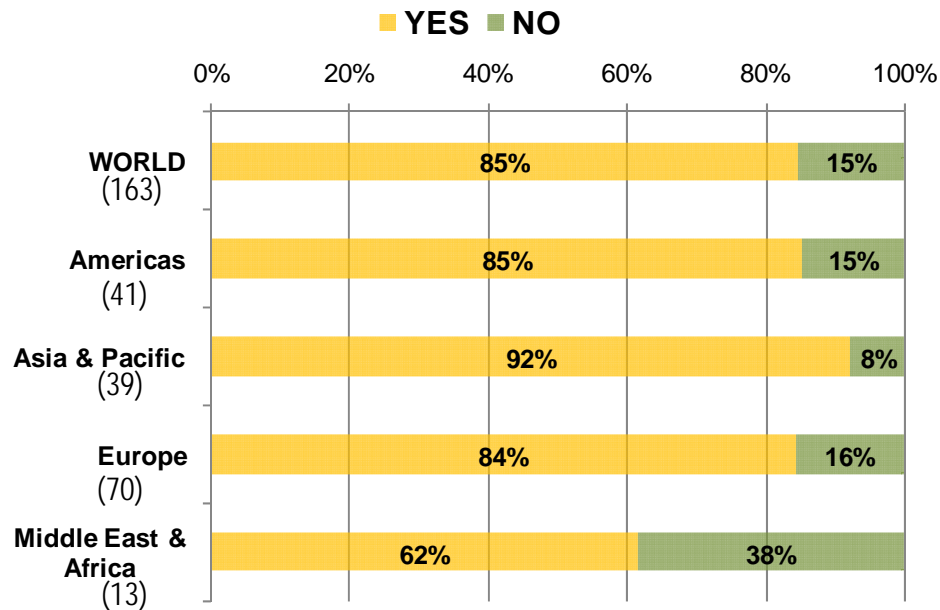
9. Have you (or your company) initiated **other specific measures** to respond to your customers' needs related to the economic downturn?

Replies (157 in total)



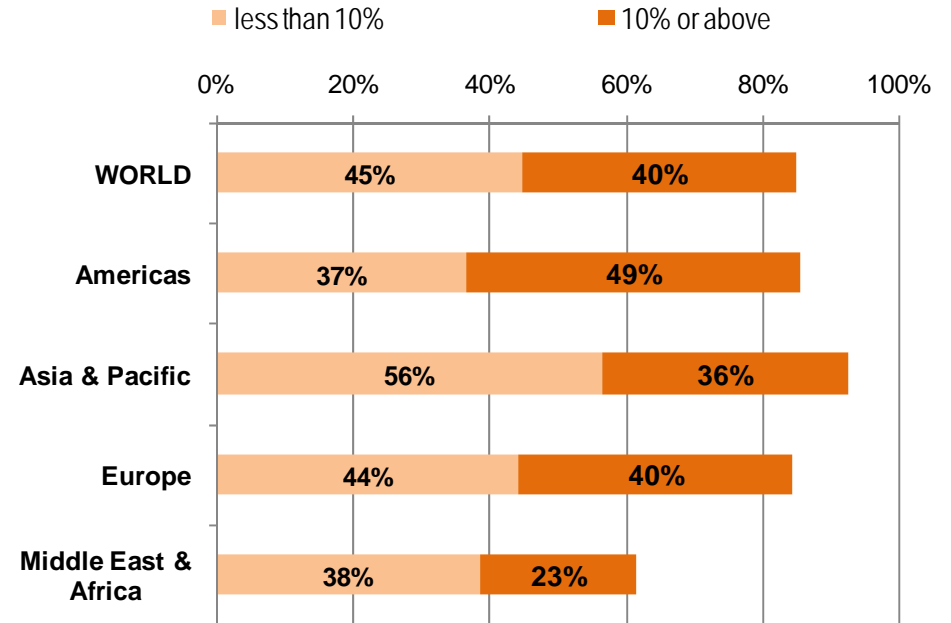
10. Have you made or do you plan to make meaningful **cost reductions** in your company operations?

Replies (163 in total)



If “YES”, % of decrease?

Replies from the 138 companies concerned



Number of answers per country/region (total = 176)

<u>Americas</u>	<u>44</u>	<u>Europe</u>	<u>75</u>	<u>Middle East/Africa</u>	<u>14</u>
Argentina	3	Austria	1	Iran	1
Bolivia	2	Belgium	4	Israel	1
Canada	1	Croatia	2	Jordan	3
Colombia	3	Czech Republic	1	Kingdom of Bahrain	1
Ecuador	4	Finland	1	Kuwait	1
Panama	2	France	4	Lebanon	1
Peru	1	Georgia	1	Libya	1
USA	26	Germany	10	Saudi Arabia	2
Venezuela	1	Greece	6	South Africa	2
not identified	1	Hungary	2	United Arab Emirates	1
		Italy	7		
		Lithuania	1		
<u>Asia / Pacific</u>	<u>43</u>	Luxembourg	1		
Australia	3	Montenegro	1		
Azerbaijan	1	Netherlands	4		
China mainland	17	Norway	2		
India	7	Portugal	1		
Indonesia	1	Romania	1		
Japan	1	Russian Federation	6		
Malaysia	1	Slovak Republic	1		
Singapore	4	Spain	5		
South Korea	5	Sweden	5		
Taipei	1	Turkey	3		
Thailand	2	Ukraine	3		
		United Kingdom	2		