

UFI Global Exhibition Barometer

 **ufi** The Global
Association of the
Exhibition Industry

27th Edition

Report based on the results of a survey
concluded in June 2021



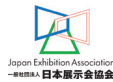
Global



India



Southern Africa



Japan



United Kingdom



Macau



Spain



Malaysia



Peru



Russian Federation



Central &
South America



Singapore



South Korea



US



Mexico



Thailand



Argentina



Brazil



Indonesia



France



Australia



Global Reports



Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

World Map of Venues – Report on trends in venue space and project developments globally.

Economic Impact Study – Report on the value of exhibitions globally and regionally.

United Nations Sustainable Development Goals – Report on the economic, social & environmental impacts of a number of exhibition industry projects.

Regional Reports



Regular market overviews on UFI's chapter regions.

Euro Fair Statistics – Annual list of certified data for Europe by country.

The Trade Fair Industry in Asia – Annual analysis of market developments for Asia & Pacific by country.

The Exhibition Industry in MEA – Overview of the exhibition market in the MEA region.

The Exhibition Industry in Latin America – The first comprehensive overview by UFI of the exhibition industry Latin America.

Topical Reports



Focused reports on challenges and developments within the exhibition industry.

COVID Related Research – Data, reports, and standards covering the exhibitions industry.

Global Visitor Insights & Global Exhibitor Insights – Data driven research reports on visitor feedback and exhibitor expectations.

Best Practices Compendiums – Case studies of successful industry developments.

Special Industry Topics – A wide ranging selection of bespoke reports into specific industry topics.

UFI Research Patron: **Freeman**

Freeman is the world's leading brand experience company. They help their clients design, plan, and deliver immersive experiences for their most important audiences. Through comprehensive solutions including strategy, creative, logistics, digital solutions, and event technology, Freeman helps increase engagement and drive business results. What makes them different is their collaborative culture, intuitive knowledge, global perspective, and personalized approach.



UFI Research is available at
www.ufi.org/research

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Welcome to the 27th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, conducted in June 2021. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 28 specific markets.

UFI launched the barometer on the back of a global crisis – the 2008 Financial Crisis - and this edition updates and adds to the previous ones released in the past 18 months to produce an assessment on the impact of the COVID-19 pandemic on the exhibition industry, as well as projections for the future.

With a record number of 474 participating companies, the reach of this barometer is unprecedented. It enables us to share specific, vastly expanded insights into 23 markets and 5 regions. This is the result of global collaboration, and we wish to thank all the following associations who take part in the project: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFE (Spanish Trade Fairs Association) in Spain, AFEP (Asociación de Ferias del Peru) in Peru, AFIDA (Asociación Internacional de Ferias de América) in Central & South America, AKEI (The Association of Korean Exhibition Industry) in South Korea, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, AOCA (Asociación Argentina de Organizadores y Proveedores de Exposiciones, Congresos, Eventos y de Burós de Convenciones) in Argentina, EEAA (The Exhibition and Event Association of

Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs) in Russia, SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, TEA (Thai Exhibition Association) in Thailand, UBRAFE (União Brasileira dos Promotores Feiras) in Brazil and UNIMEV (French Meeting Industry Council) in France.

Important remarks

The number of replies to the current survey (474 from 64 countries and regions - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 23 markets where a significant number of answers were obtained. Due to decimal rounding, the percentage values indicated in some charts may not exactly sum up to 100%.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at research@ufi.org

This research is available online at www.ufi.org/research

The 27th Barometer surveyed participants' monthly operations, to qualify their level of activity as "normal", "reduced" or "no activity", from January 2021 and including their predictions until December 2021. These "company operations" include, for many companies and while face-to-face events are not possible, working into the development of digital solutions.

Companies were also asked when they believed exhibitions would open again in their city, and what element they considered most helpful towards the "bounce back" of exhibitions.

Globally the situation is gradually improving: the proportion of companies globally expecting "no activity" for the last quarter of 2021 has fallen from 53% in January to less than 10%, while the proportion of companies with "normal activity" has increased from 12% to close to 50%.

These results vary depending on region and are primarily driven by the currently confirmed or expected "reopening date" of exhibitions.

Regional results indicate that the Middle East & Africa and Central & South America regions are likely to be more affected than others with a monthly average throughout 2020 of respectively 40% and 34% of "no activity" (31% in Europe, 25% in North America and 23% in

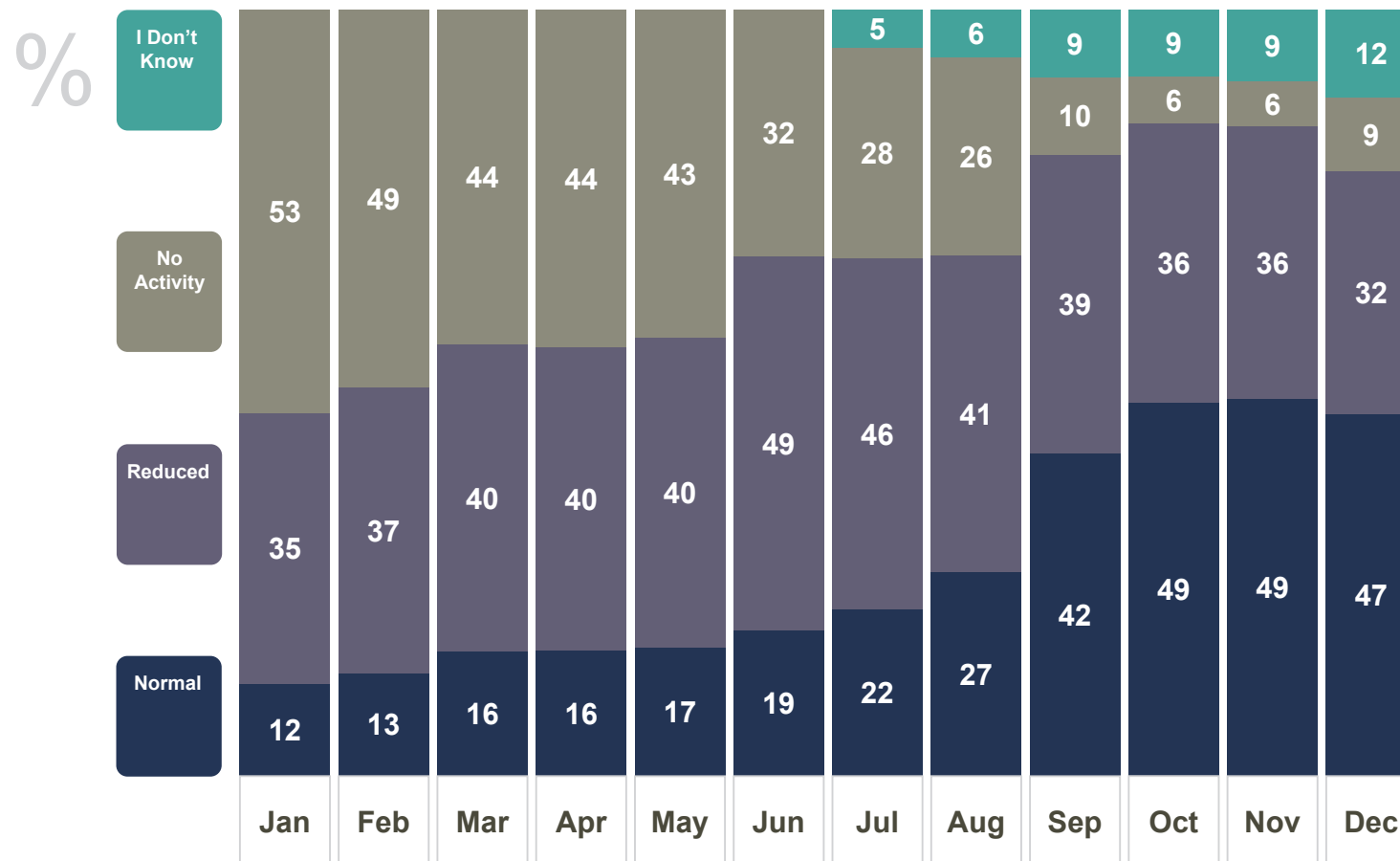
Asia & Pacific) and 22% and 20% of "normal activity" (27% in Asia & Pacific, 30% in Europe and 35% in North America).

While several markets reportedly reopened in June 2021, the majority of companies in all regions expect both local and national exhibitions to open again in the coming 12 months, and international exhibitions to reopen in the first half of 2022.

When asked what element would most help towards the "bounce-back" of exhibitions, the majority of companies rank "lifting of current travel restrictions" (71% of answers), "readiness of exhibiting companies and visitors to participate again" (58% of answer), and "lifting of current public policies that apply locally to exhibitions" (55% of answers) as the key drivers. These "top 3" elements apply to all regions, except Middle East & Africa, where "mid-term visibility in terms of public policies, including travel restrictions" ranks third (with 45%). North America and Central & South America rank "readiness of exhibiting companies and visitors to participate again" as the most important of these three elements.

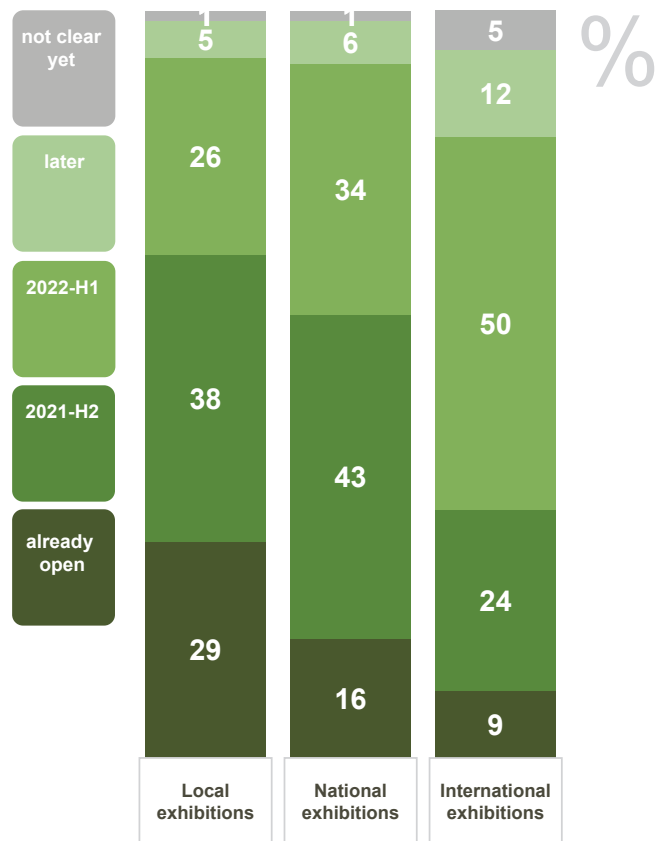


Reported levels of exhibition industry operations throughout 2021

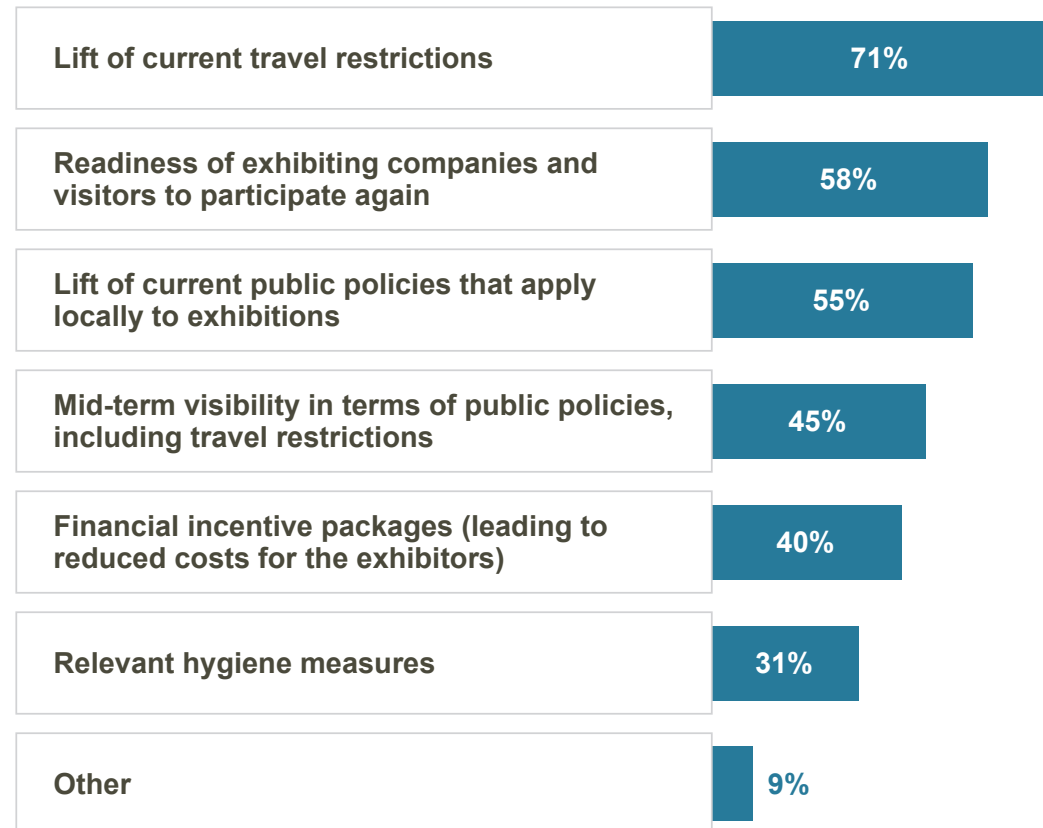




When do you believe exhibitions will open again in your city?



What do you believe would most help the “bounce back” of exhibitions?



The 27th Barometer surveyed the participants' expectations for their company's 2021 gross turnover, when compared to 2019. The survey also questioned the evolution of operating profits for 2020 compared to the previous year.

The following charts present:

- revenues from 2020, as declared in the previous survey conducted in December 2020 and projections for the full year 2021 compared to 2019, on average for all companies, and also broken down per level of revenue realised (0% of last year, less than 25%, etc.).
- the evolution of operating profits for 2020 and those for 2019 (taken from the previous Barometer).

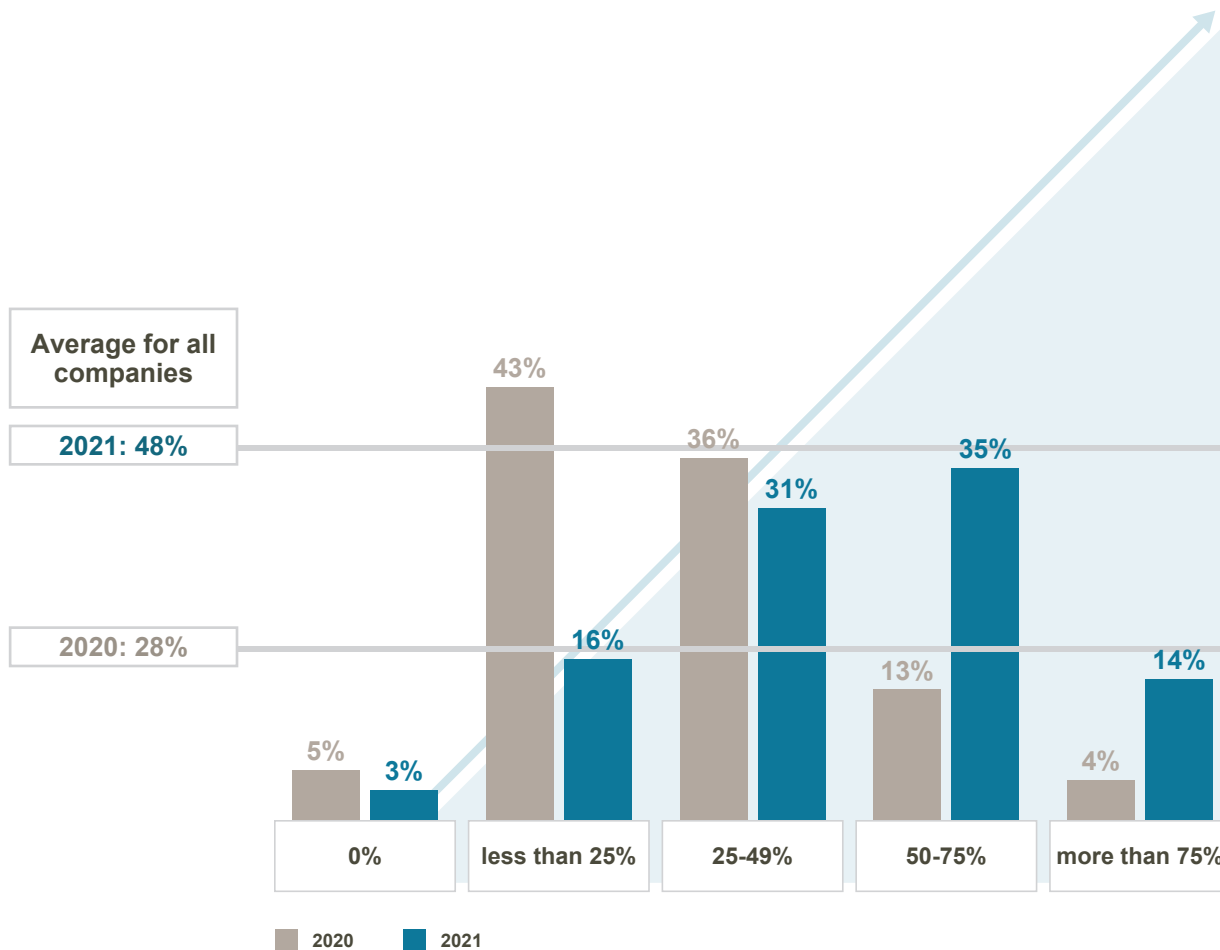
On average globally, it is currently expected that 2021 revenues will represent 47% of those of 2019. In terms of profits, 51% of companies reported a loss in 2020, and 24% a reduction of their profit by more than 50%.

Regional results indicate that:

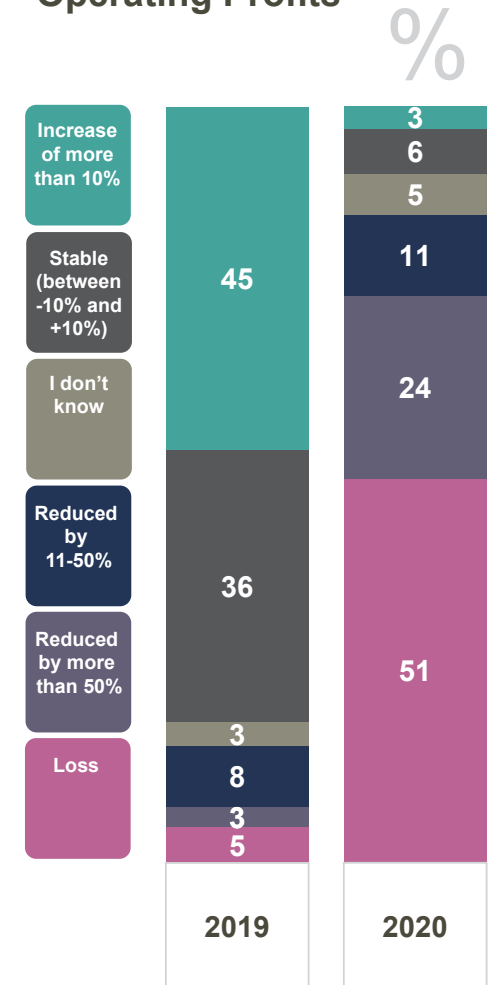
- The revenue drop anticipated for 2021 is highest in the Middle East & Africa and Central & South America (respectively only 35% and 37% of 2019 revenues), followed by Europe (48%), Asia & Pacific (50%) and North America (55%).
- In terms of profits, the percentage of companies who have seen a loss for 2020 is 41% for North America, 44% for the Asia & Pacific, 51% for the Middle East & Africa, 55% in Europe, and 59% for Central & South America.



Revenue compared to 2019



Operating Profits



The 27th Barometer surveyed the impact of the COVID-19 crisis regarding public financial support, workforce reduction, and their perspectives in case of no business for the next 6 months.

Overall, 48% of companies have benefitted from some level of public financial support; for the majority of these, this represented less than 10% of their overall 2019 costs.

This public support is stronger in Europe (65%) and Asia & Pacific (49%) than in North America (36%), the Middle East & Africa (18%) and Central & South America (8%).

57% of companies have had to reduce their workforce, over half of these have made reductions of more than 25%.

There was a higher reduction in workforce amongst companies in Central & South America (79%), the Middle East & Africa (73%) and North America (63%) than in Asia & Pacific (52%) and Europe (43%).

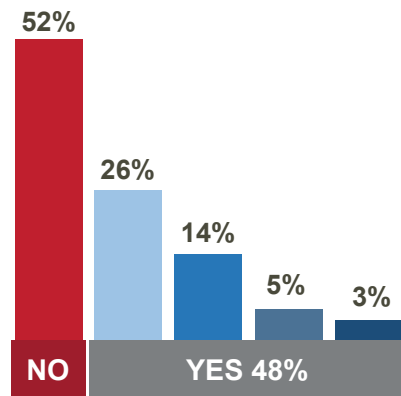
10% of companies state they will have to permanently close if there is no business for the next six months (5% in North America and Europe, 10% in Central & South America, 12% for the Middle East & Africa and 16% in Asia & Pacific).

For 57% globally, “it will be hard, but we can keep our heads above water”, while 34% of companies consider they will manage (this proportion varies from 23% in Central & South America to 41% in the Middle East & Africa).

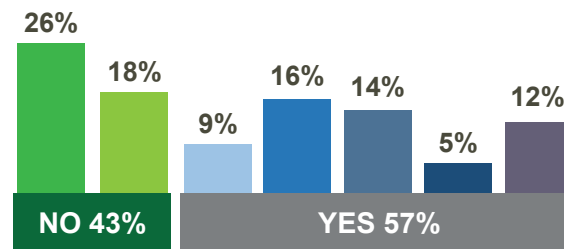
Public Financial Support – Workforce – Perspectives WORLD



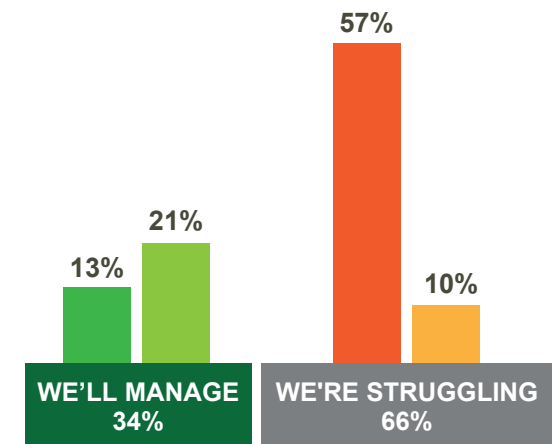
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

Most Important Business Issues

Companies were asked to identify the most important issues for their business in the coming year from a pre-defined list of eight issues. Multiple choices were proposed to get further insights for some answers.

In line with results from the last Barometer six months ago, “impact of the COVID-19 pandemic on the business” and “state of the economy in home market” are considered to be the two most important business issues, selected by 29% and 19% of respondents. “Global economic developments” (15% of respondents) “impact of digitisation” (10% of respondents) and “internal management challenges” (9% of respondents) also remain high on the list of key business issues.

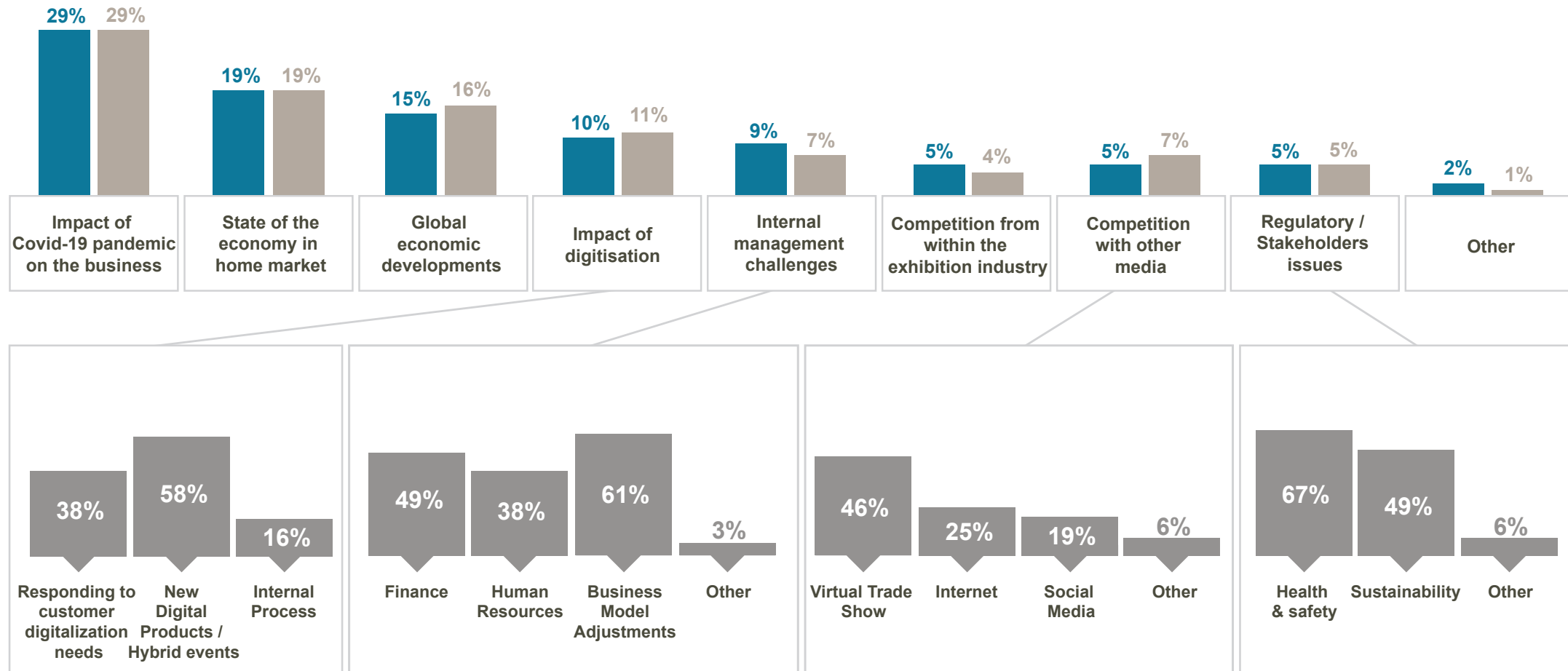
The following pages show the consolidated results, for the world and by region. “impact of COVID-19 pandemic on the business” ranks higher in the Middle East & Africa (34%), “state of the economy in home market” ranks higher in Central & South America (26%), and “global economic developments” ranks higher in the Middle East & Africa (20%).

Further insight is also provided by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”).

While “impact of COVID-19 pandemic on the business” remains the main issue for all respondents, “internal management challenges” and “competition from within the industry” are the second and third main issues for service providers (respectively 18% and 16% of respondents). Meanwhile, “Internal management challenges” ranks third for venues (18%) and organisers (16%).

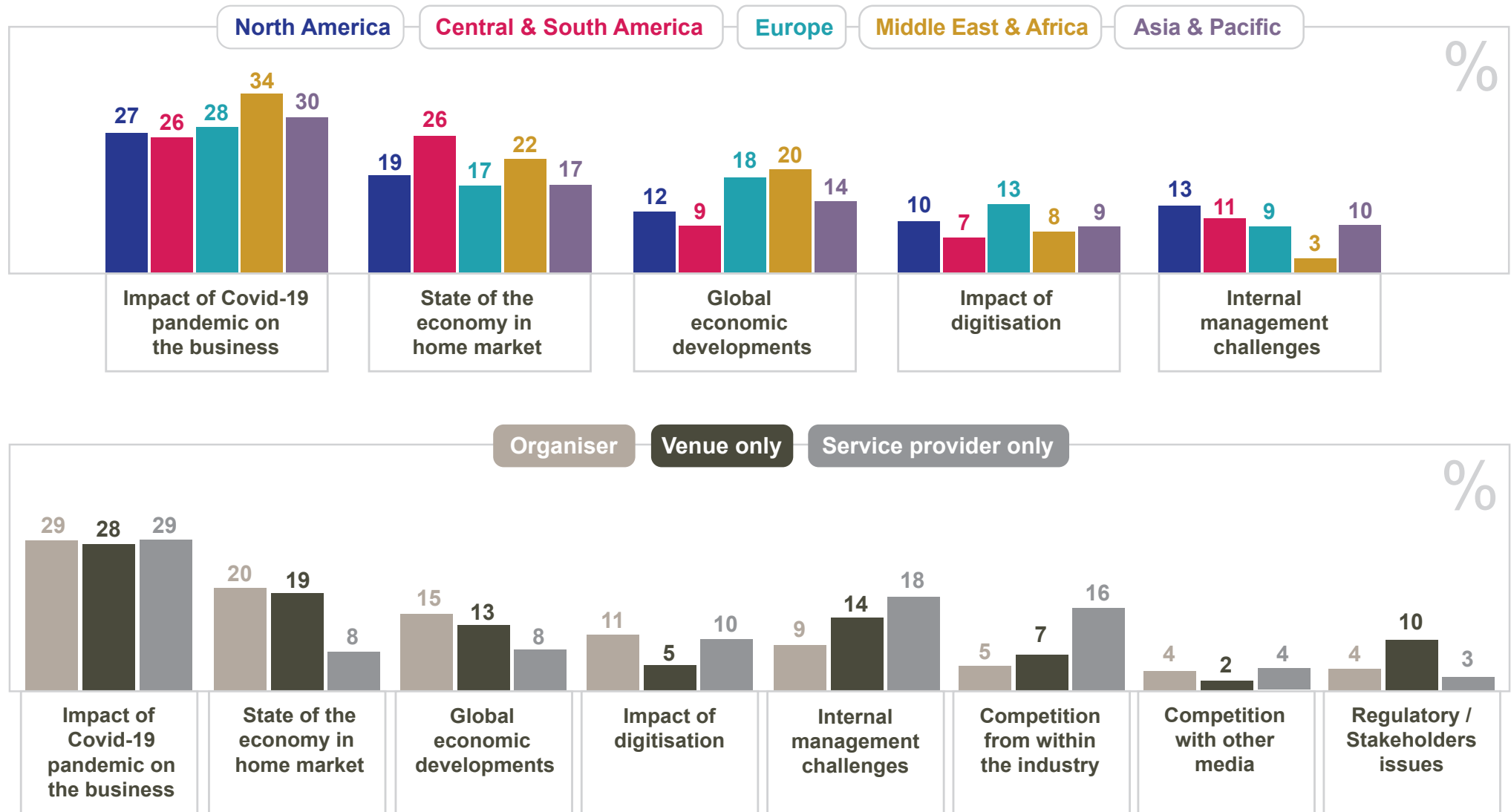
Results from current survey - June 2021

Results from previous survey - Dec 2020



(multiple answers possible)

Most important issues: detail by region and type of activity for the five top issues identified globally



With digitisation of product and services highlighted throughout the pandemic, the Global Barometer looked into the state of digital activity in the exhibition industry. The following pages show the global results, followed by detailed results per region and industry segment.

58% of respondents said that they have added digital services/products (such as apps, digital advertising and digital signage) to their existing exhibition offerings. This is especially the case in Asia & Pacific (67%).

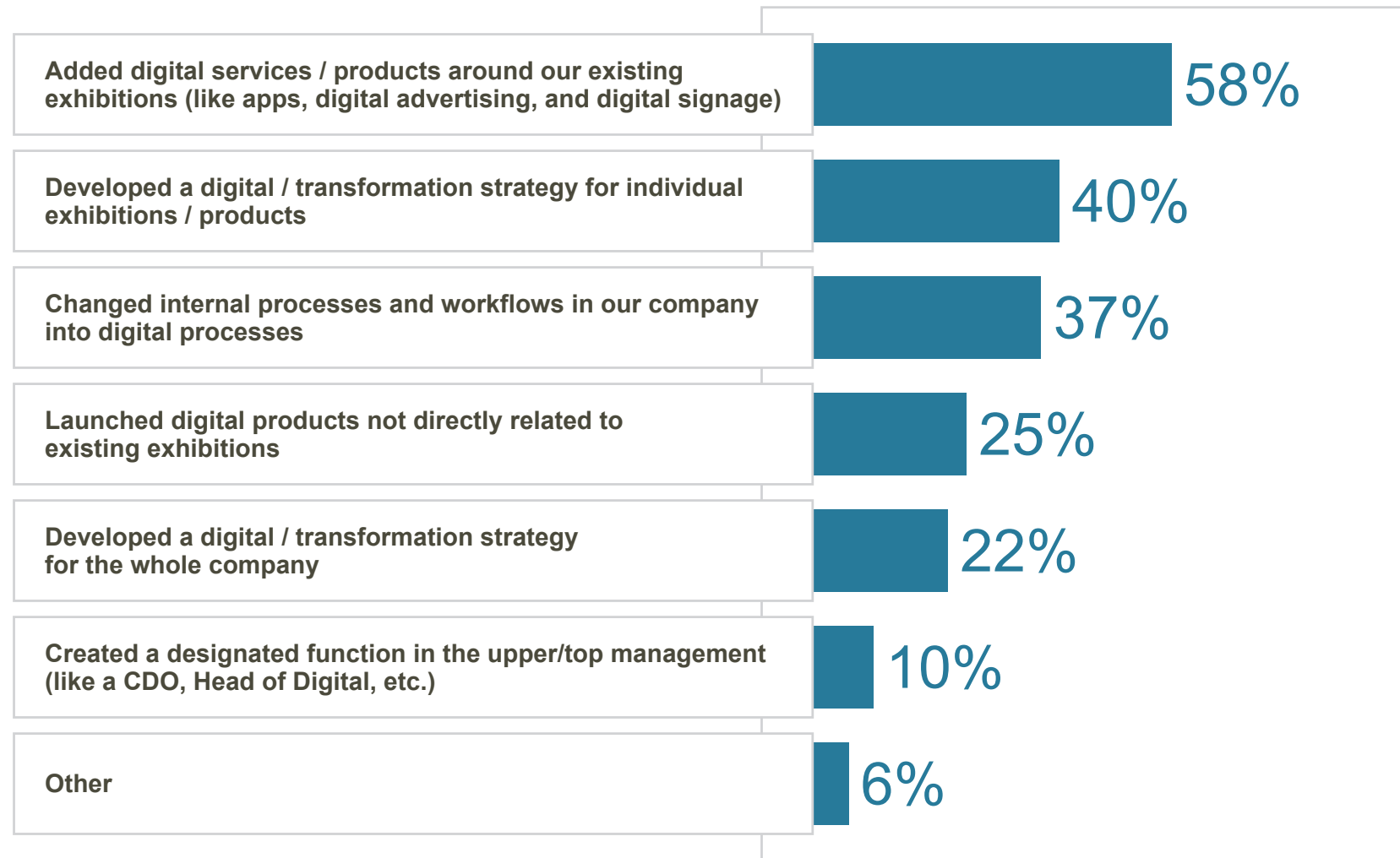
In addition, while 40% of respondents globally indicated that they have developed a digital transformation strategy for individual exhibitions and products, this number was higher in North America, at 57%.

And while 37% of respondents globally stated that they have digitised internal processes and workflows, this number was again higher in North America, at 54%).

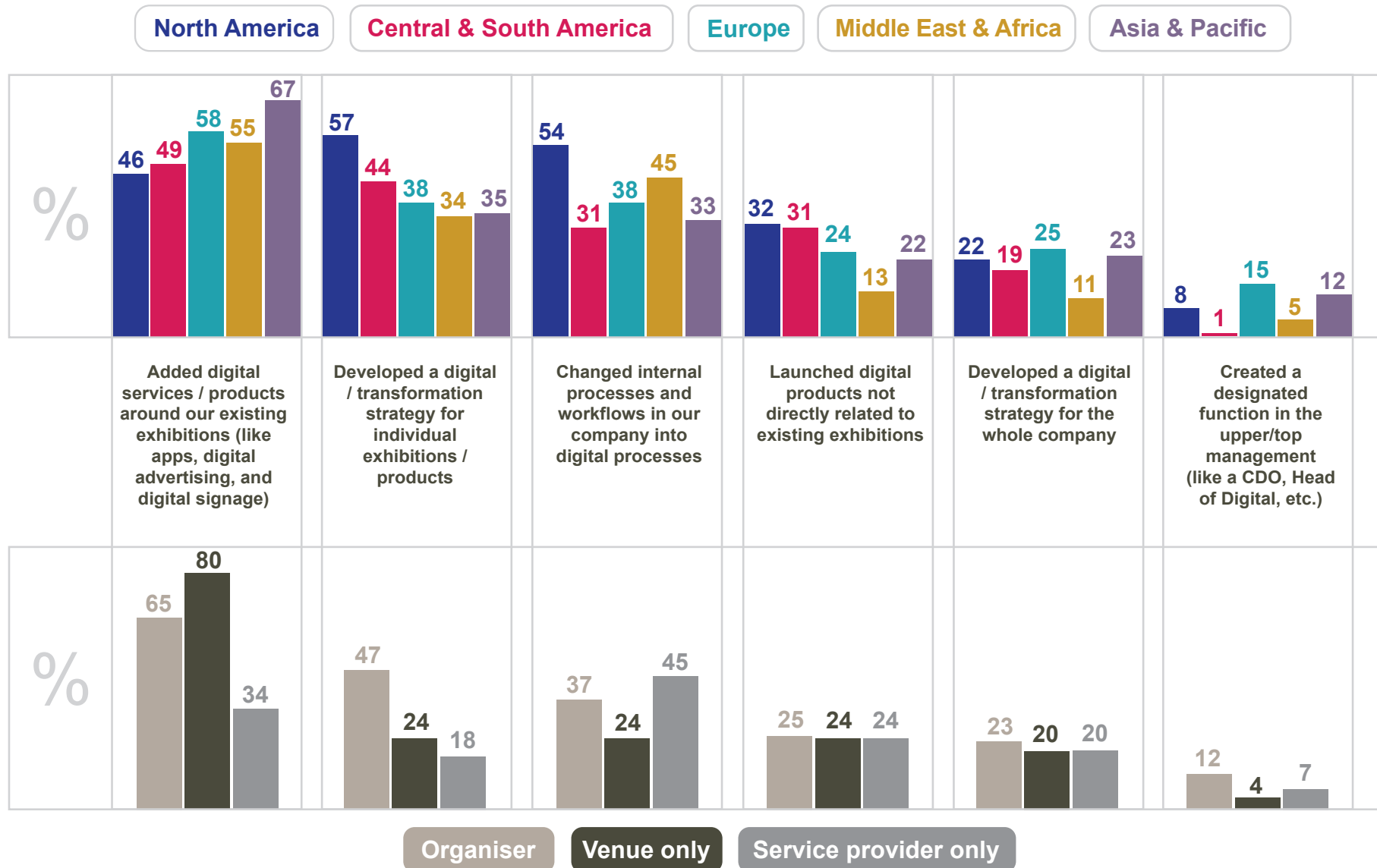
25% of survey participants stated that they have launched digital products not directly related to existing exhibitions and 22% reported that they have developed a digital transformation strategy for the whole company.

10% on average have created a designated function (like a Chief Digital Officer) in the upper/top management.

Actions put in place



Actions put in place



The 27th Barometer focussed on possible driving trends for the format of exhibitions in the coming years, by asking companies to assess four different statements. As the same question was in the two previous editions of this research, the comparisons allow to identify trends.

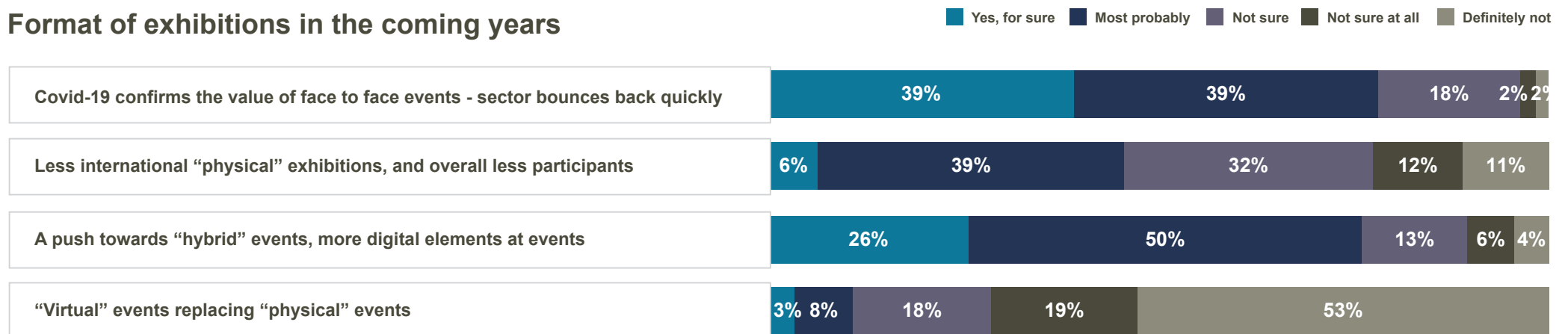
The results show no significant differences across regions.

Global results indicate that:

- 78% of companies (up from 64% six months ago and 57% 12 months ago) of respondents are confident that “COVID-19 confirms the value of face- to-face events” anticipating that the sector will bounce back quickly (39% “Yes, for sure” and 39% “Most probably”), while 20% are “Not sure”.
- 46% - compared to 63% 6 months ago and 57% 12 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants” (6% “Yes, for sure” and 39% “Most probably”), and 44% are “Not sure”.
- 6% of companies – 80% 6 months ago and 82% 12 months ago - consider that there is “A push towards hybrid events, more digital elements at events” (26% “Yes, for sure” and 50% “Most probably”).
- 11% - down from 14% 6 months ago and 17% 12 months ago - agrees with the statement that “Virtual events replacing physical events” (3% “ Yes, for sure” and 8% “Most probably”), 36% are “Not sure” and 53% are stating “definitely not”.



Format of exhibitions in the coming years



The 27th Barometer introduced new questions to measure the current and projected levels of activities related to hybrid or digital events in relation to physical events. It also questioned venues about their expended activities during these Covid-19 times.

Global results indicate that companies project that for the whole of 2021, 50% of the events they will have run will be physical (on-site), 30% “hybrid” and 20% digital.

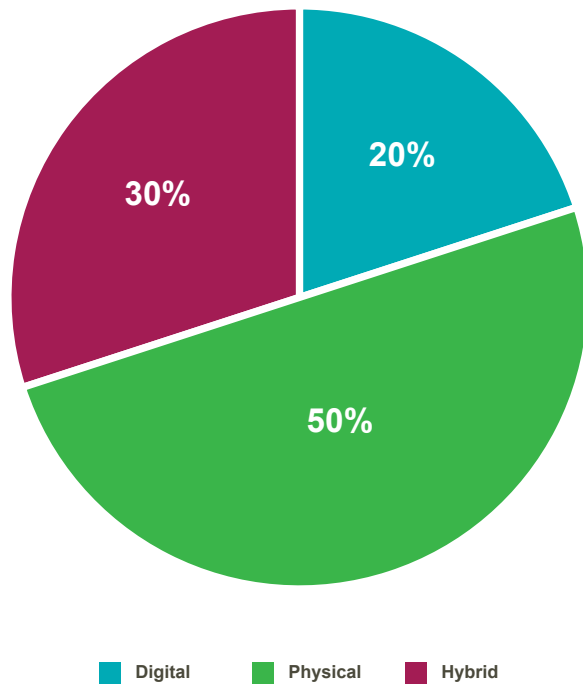
In terms of income for the next 2 years, 61% of companies that answered the survey declare that physical & “hybrid” events will represent more than 50% of their income, and 59% consider that digital events will represent less than 10%.

There are no strong regional differences, although digital events have a stronger relevance in Central & South America, where 31% of events organised in 2021 will be digital, and 53% of companies believe that digital events will represent more than 10% of their income for the next two years.

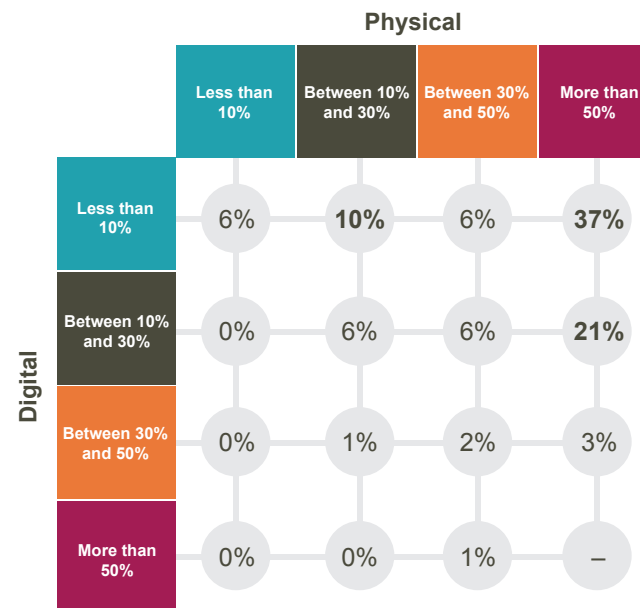
Most venues have expanded their range of activities as physical events were limited:

- 56% went for streaming of digital events, as broadcast studio
- 49% ran vaccination centres
- 35% held sports and / entertainment events stage
- 26% proposed their site to generate brand activations
- And 20% were used as temporary hospitals.

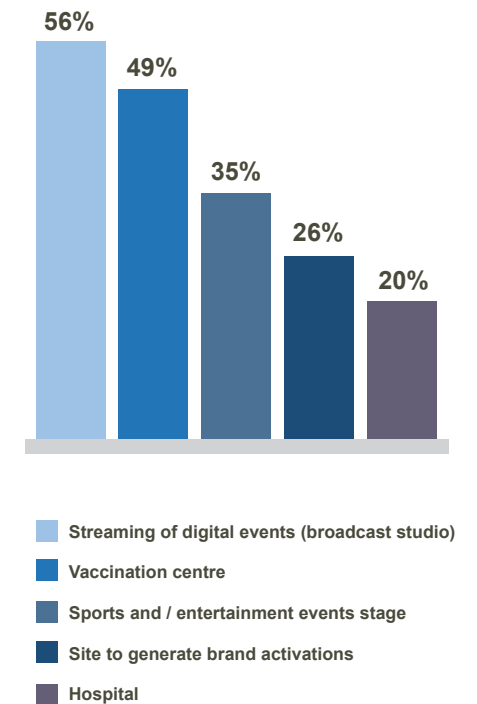
Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



Expanded activities (for venues only)



Part 2: Detailed results for 5 regions and 23 markets

North America:

Mexico
US

Central & South America:

Brazil
Chile
Colombia

Europe:

France
Germany
Italy
Russian Federation
Spain
Turkey
United Kingdom

Middle East & Africa:

UAE
South Africa

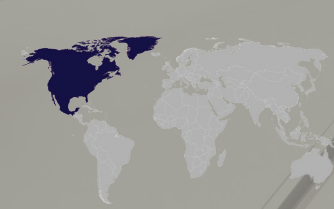
Asia & Pacific:

Australia
China
Hong Kong
India
Japan
Malaysia
Singapore
South Korea
Thailand

A network diagram consisting of several blue, reflective spherical nodes connected by thin, light blue lines. The nodes are arranged in a non-uniform pattern, with some having multiple connections. The background is a solid, medium blue color.

North America

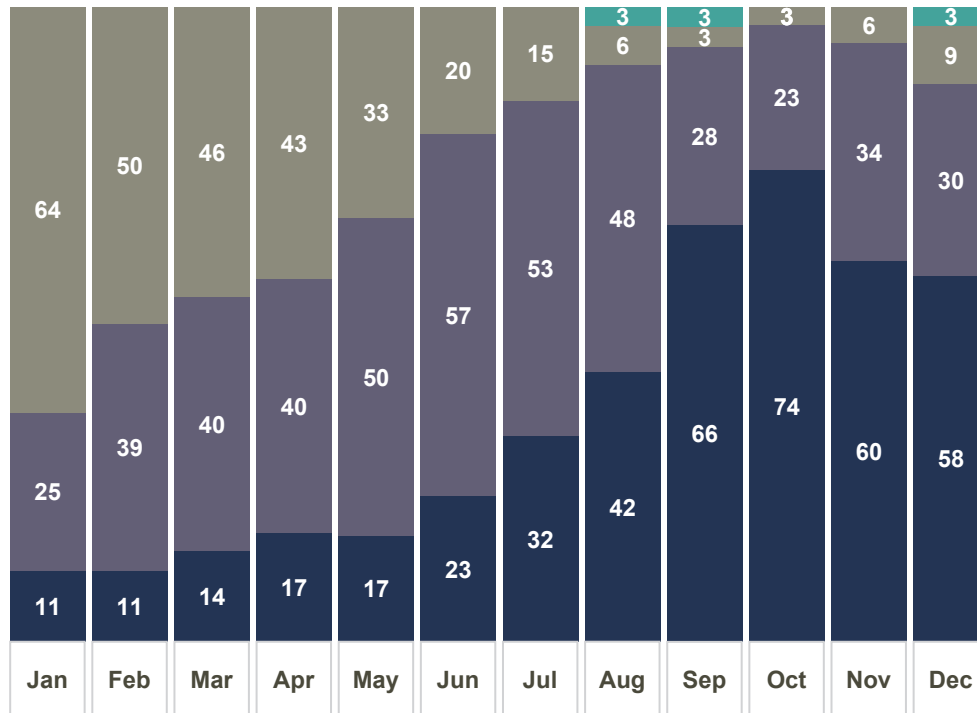
Operations - Reopening Exhibitions North America



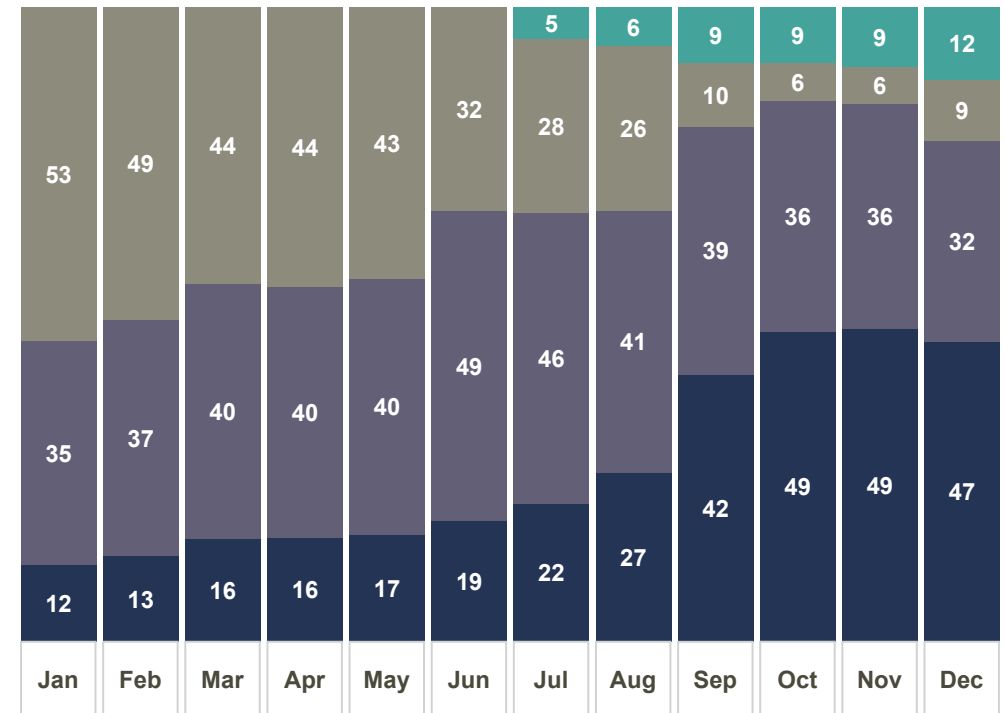
Situation of industry operations in 2021



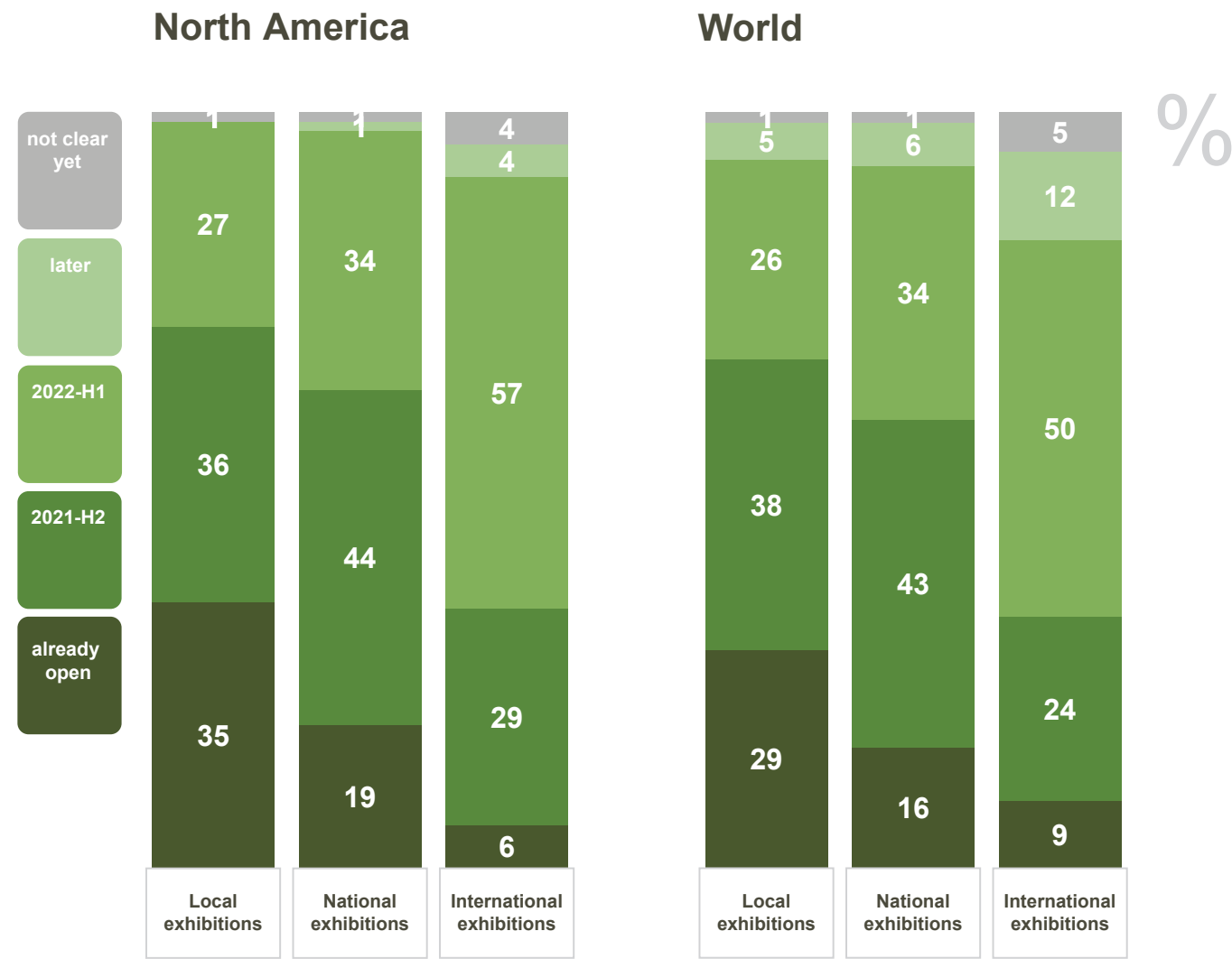
North America



World

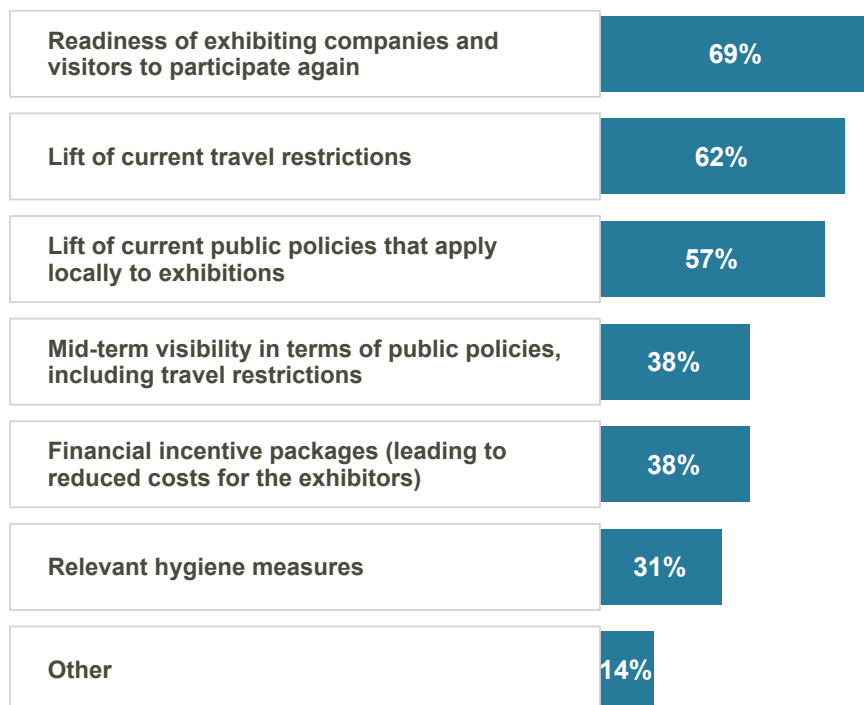


When do you believe exhibitions will open again in your city?

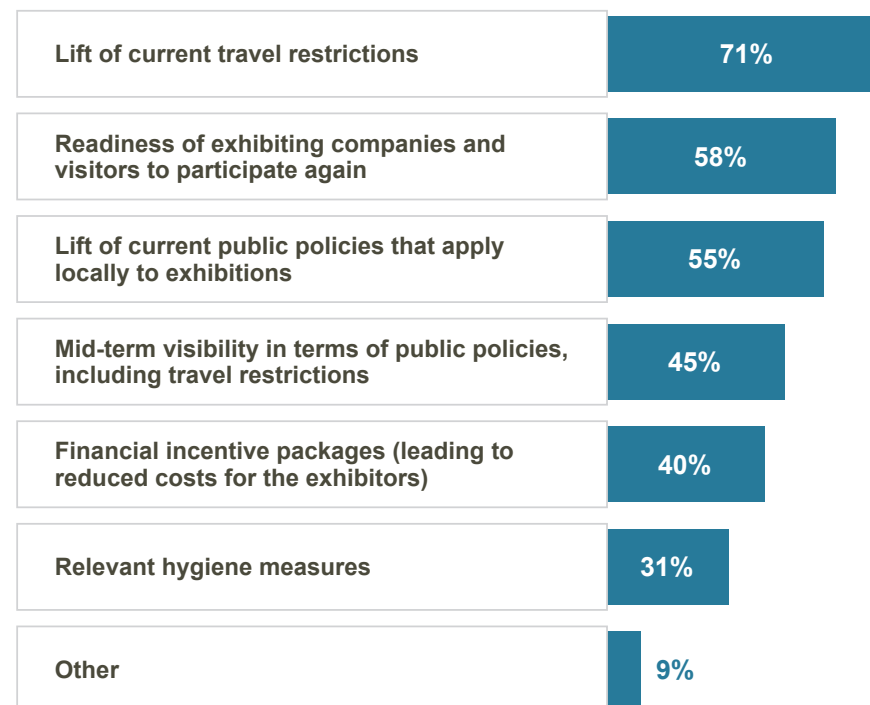


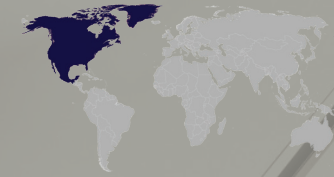
What do you believe would most help the “bounce back” of exhibitions?

North America



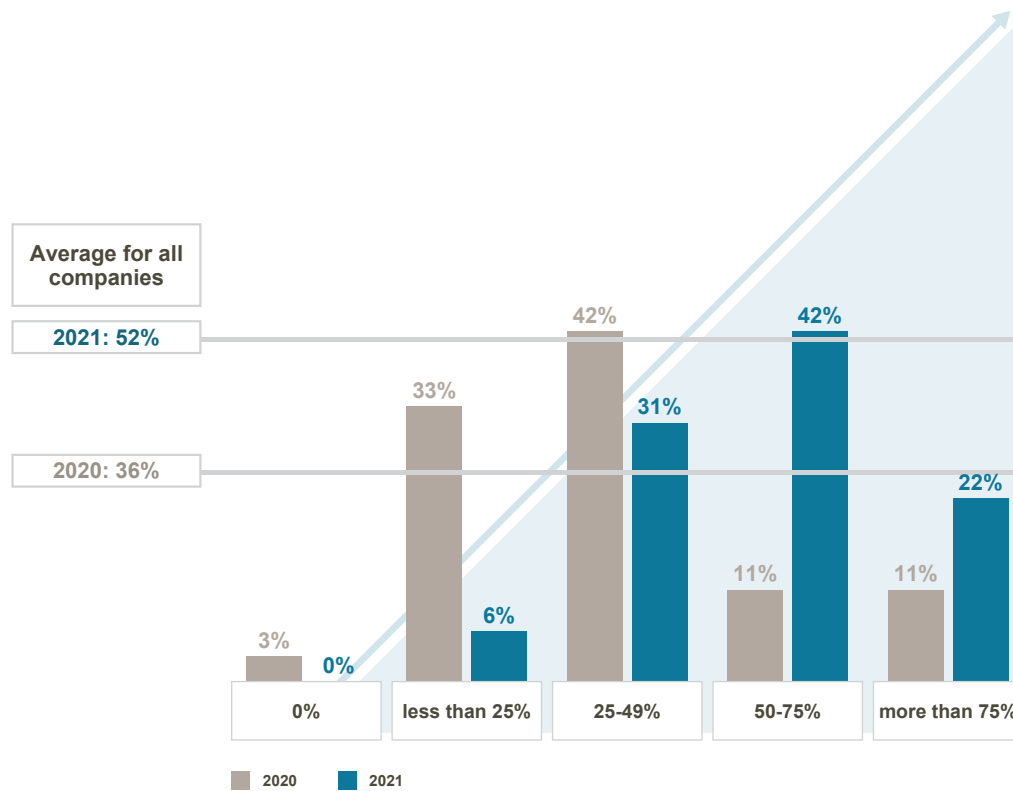
World



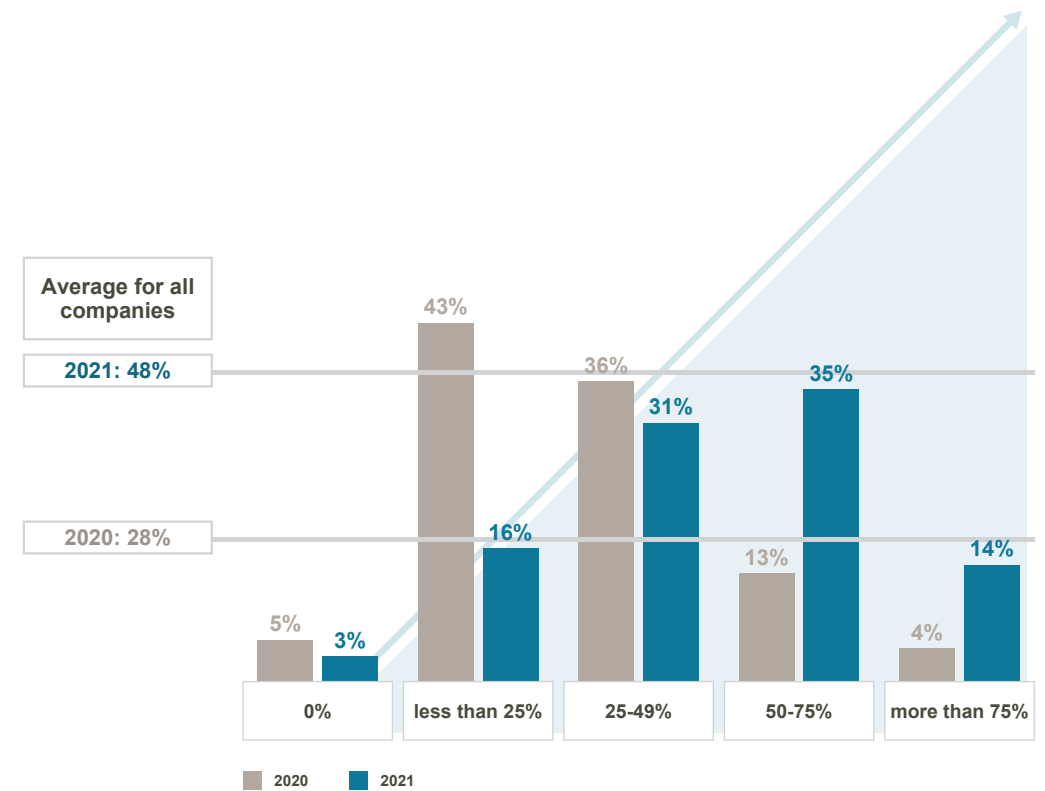


Revenue compared to 2019

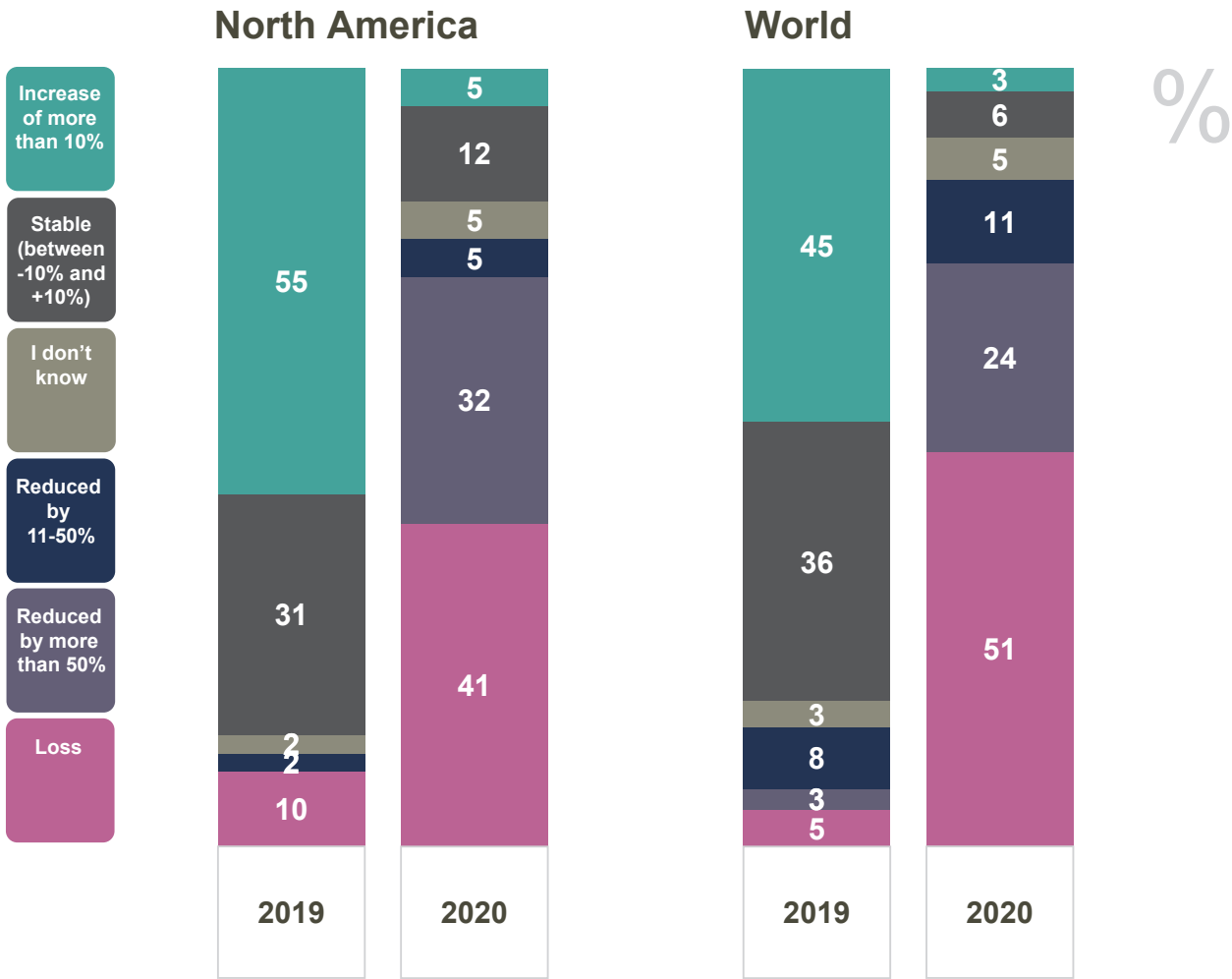
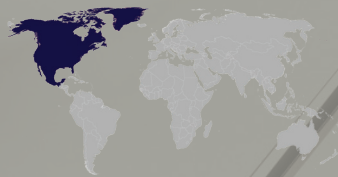
North America

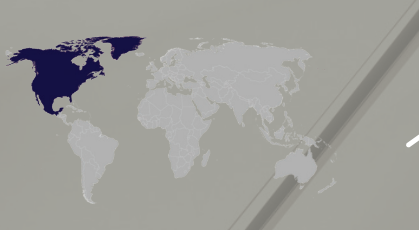


World



Operating Profits North America

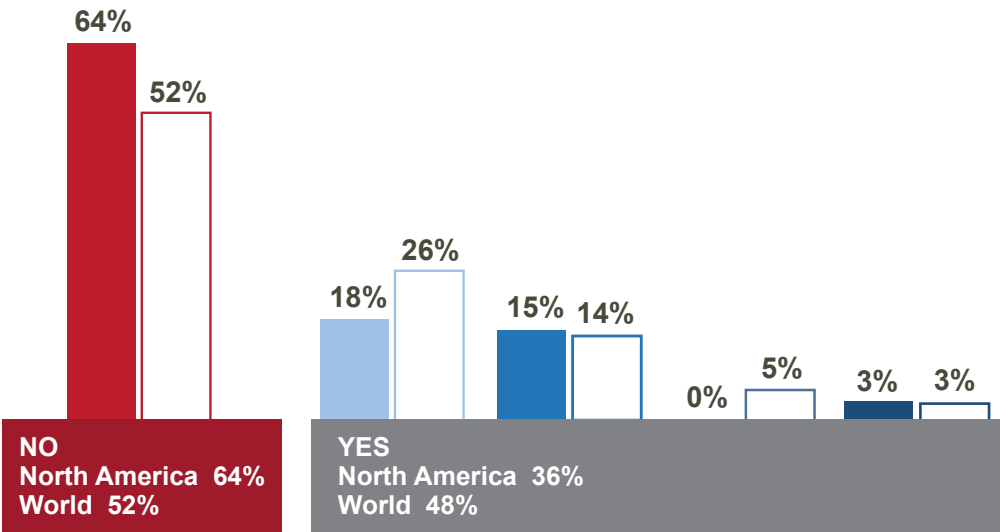




Did your company benefit from public financial support?

North America World

- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

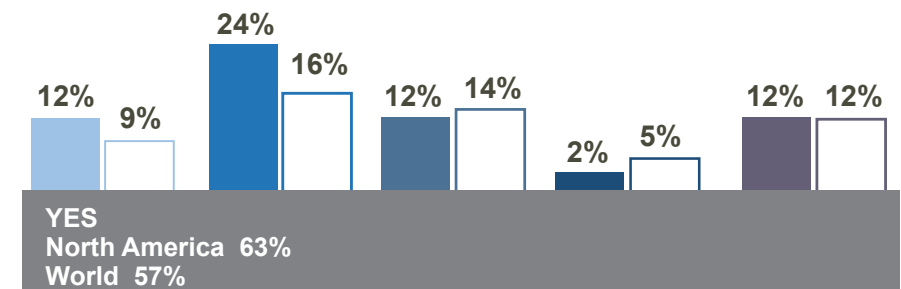
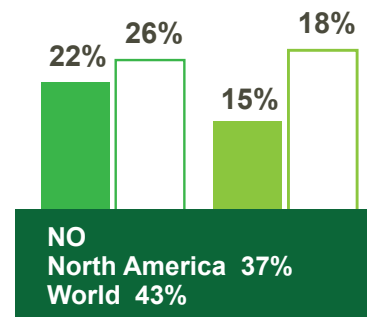


Have you had to reduce your workforce?

North America

World

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

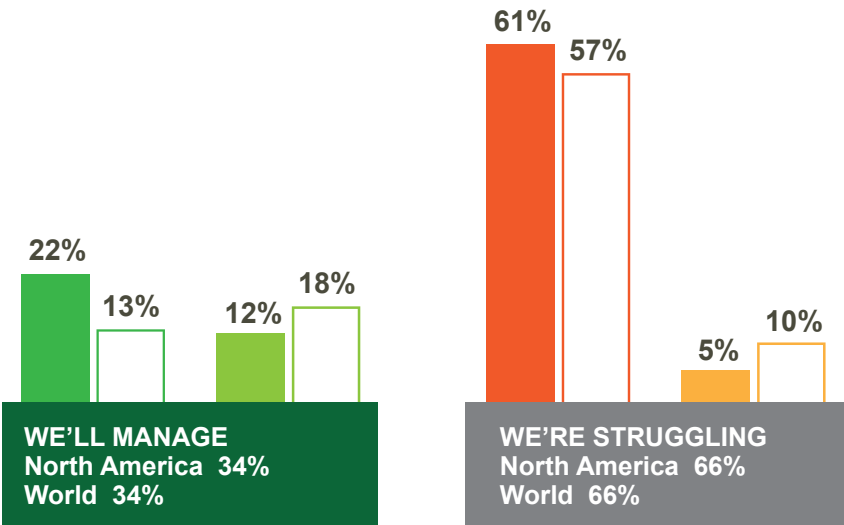


If there is no business for the next 6 months,
which best applies?

North America

World

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

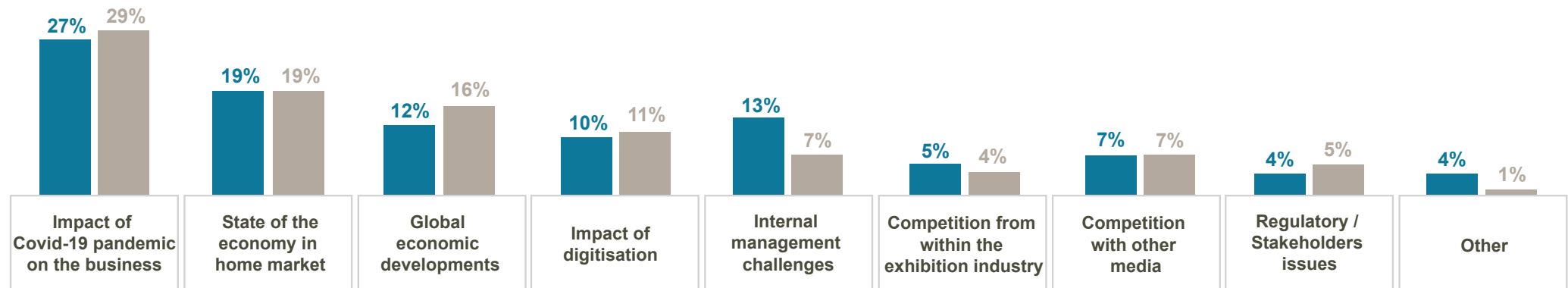


Most Important Business Issues - Format of Exhibitions - North America

Most important business issues in the exhibition industry

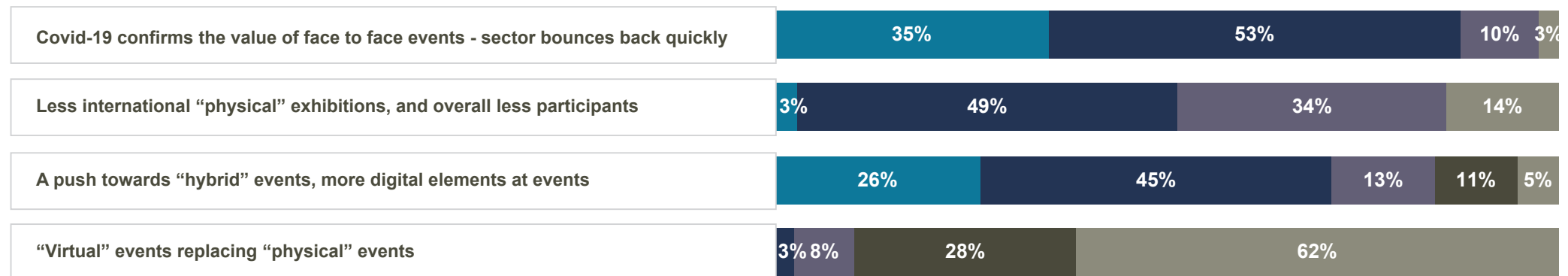
North America

Global



Format of exhibitions in the coming years

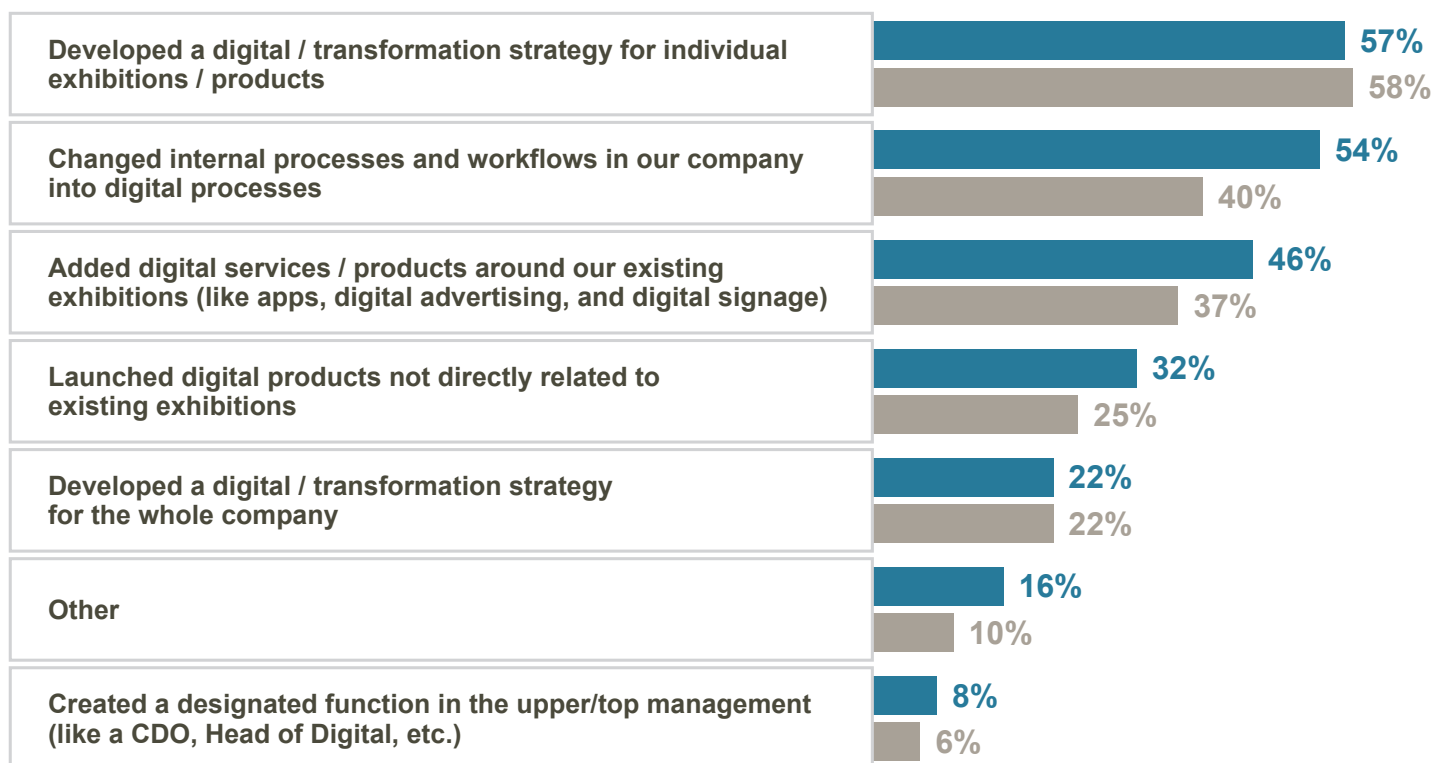
Yes, for sure Most probably Not sure Not sure at all Definitely not



North America

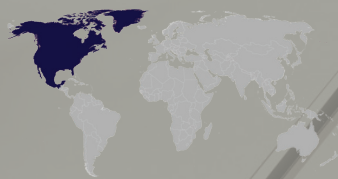
Global

Digitisation: implementation in North America and globally

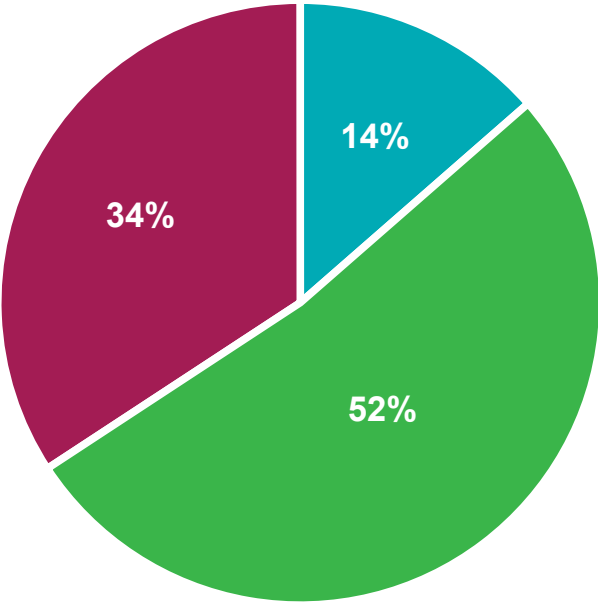


Number of fairs projected in 2021

North America

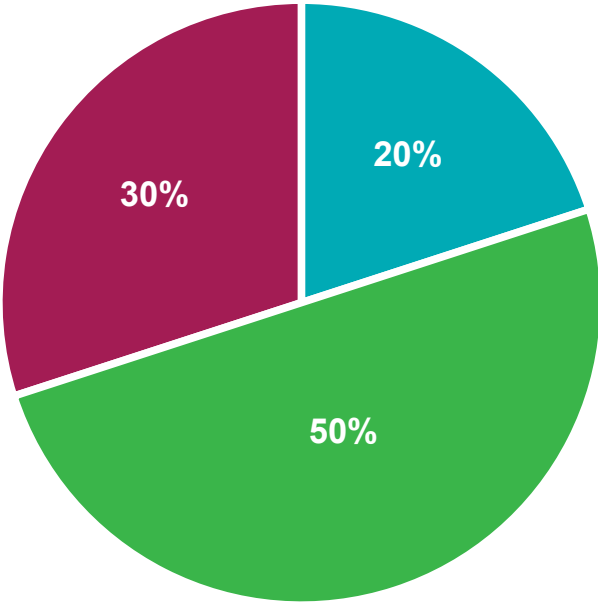


North America



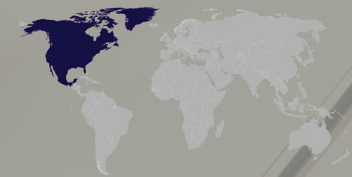
Digital Physical Hybrid

World

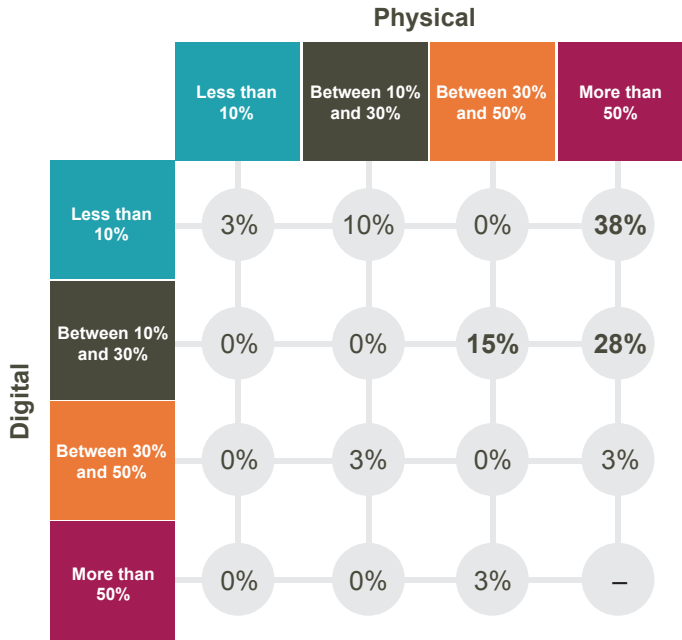


Digital Physical Hybrid

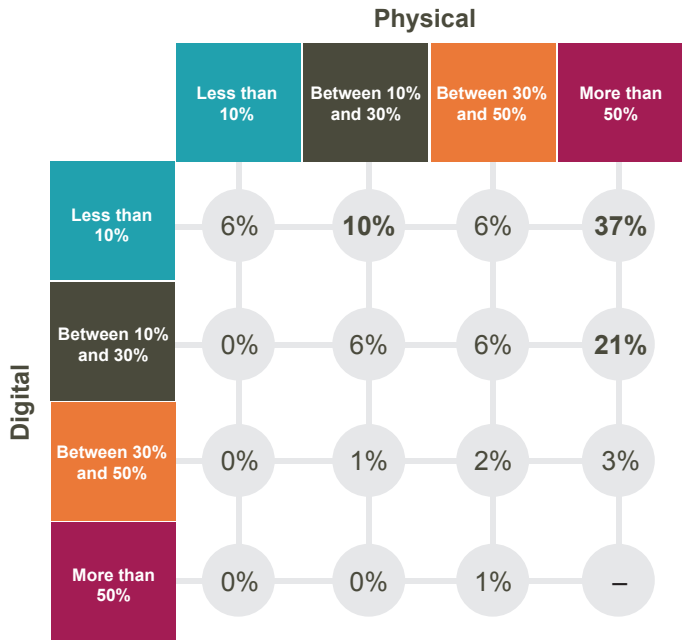
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



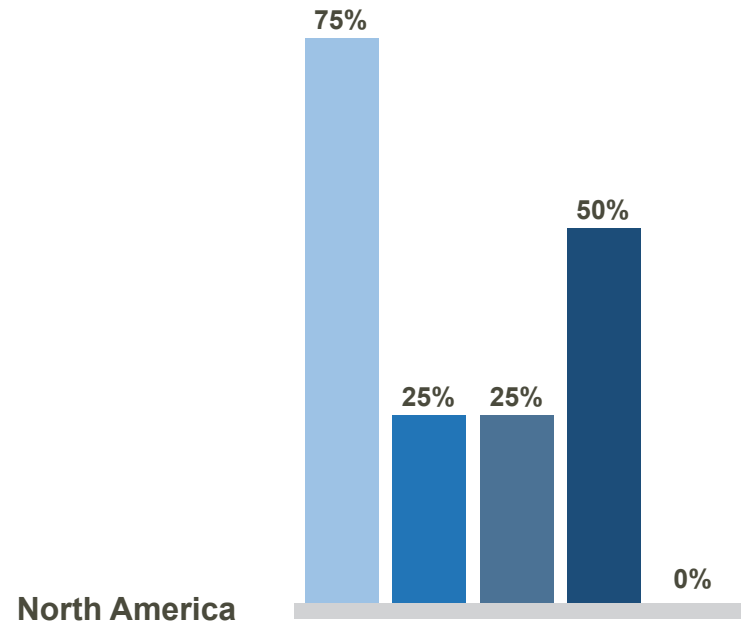
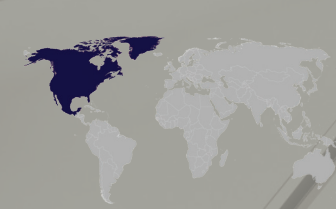
North America



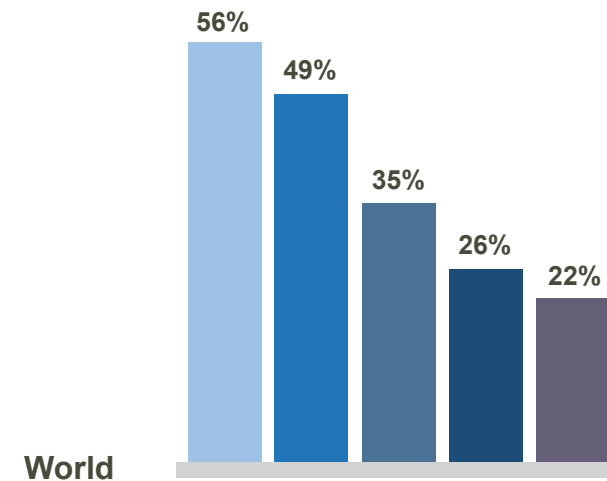
World



Expanded activities (for venues only) North America



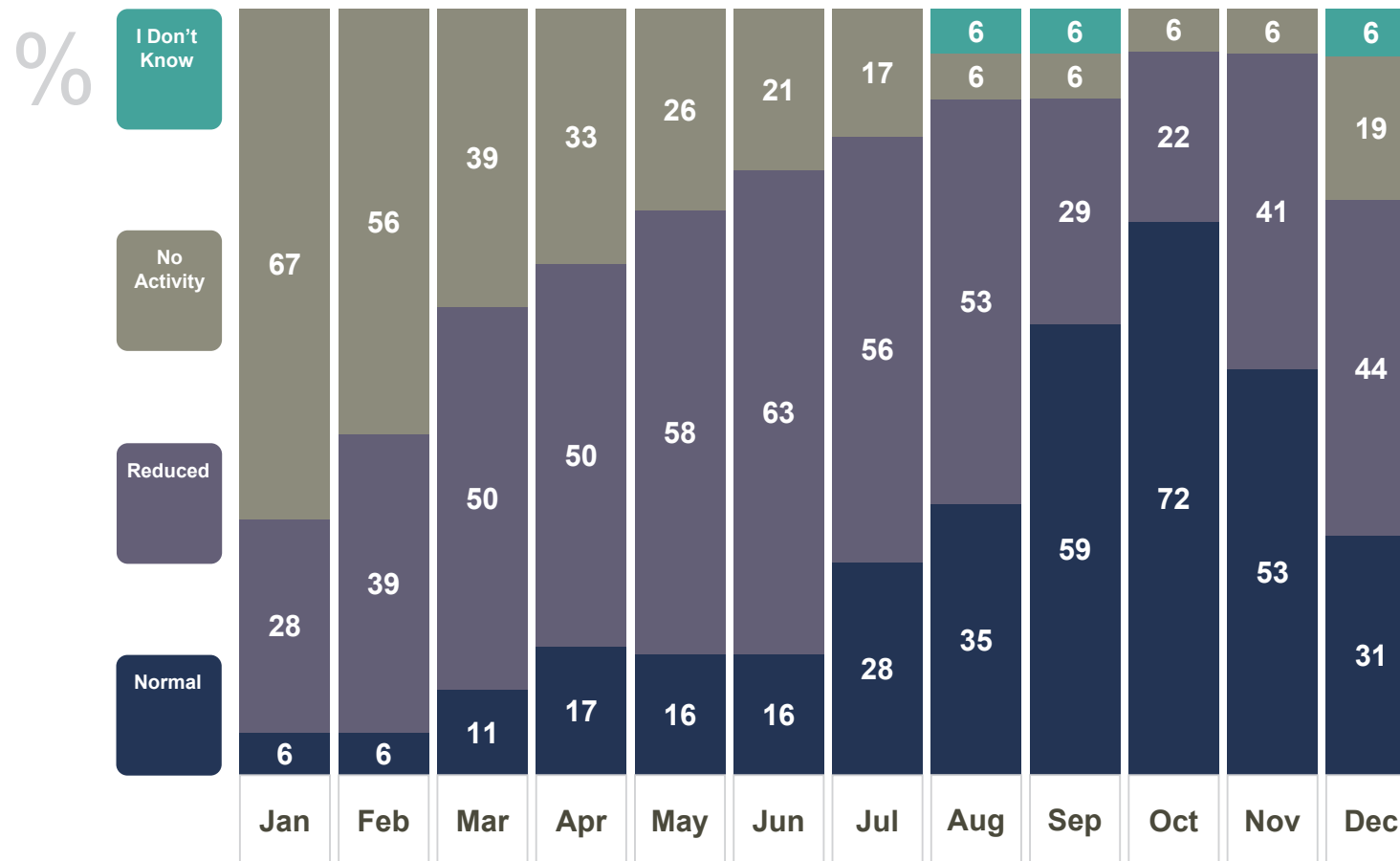
- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital



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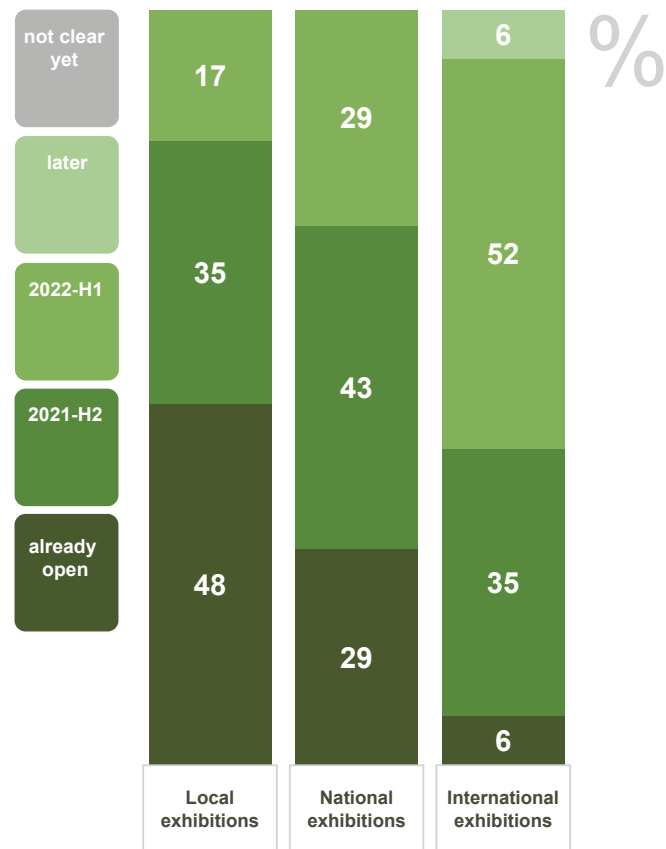


Situation of industry operations in 2021

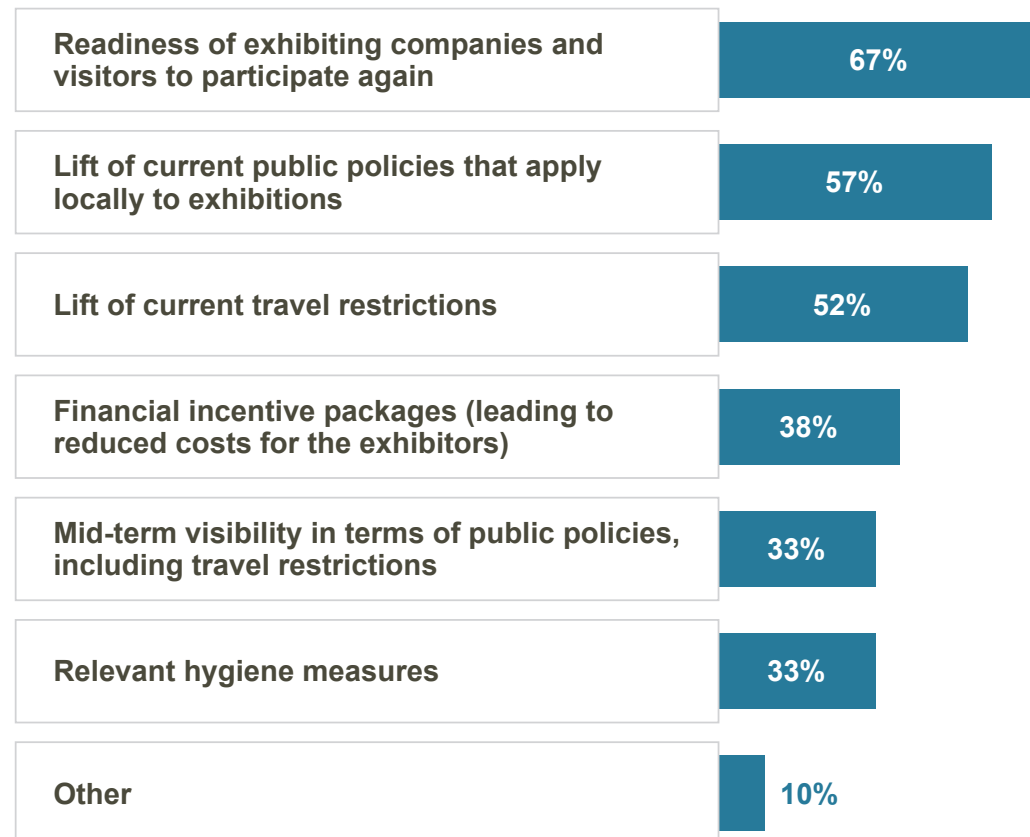




When do you believe exhibitions will open again in your city?

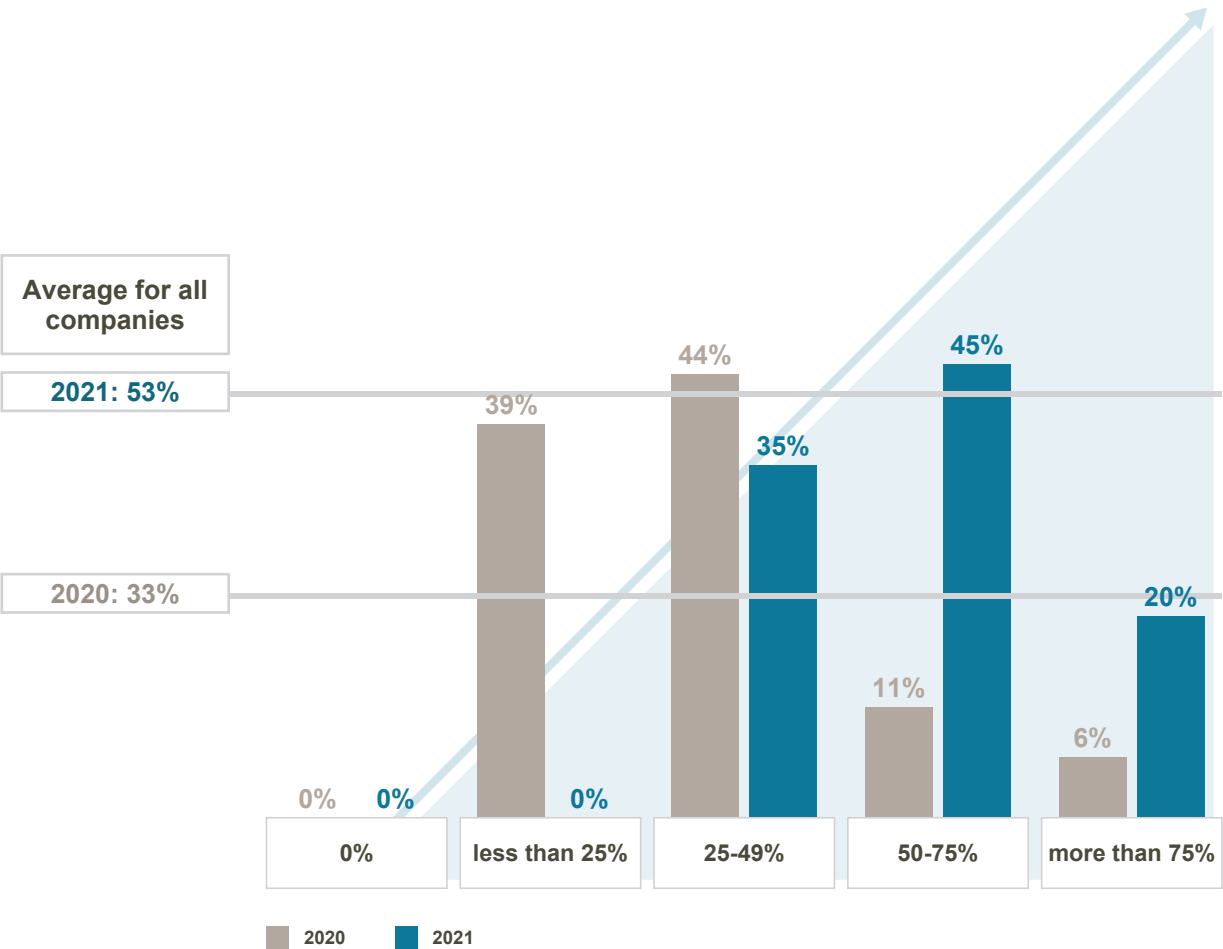


What do you believe would most help the “bounce back” of exhibitions?

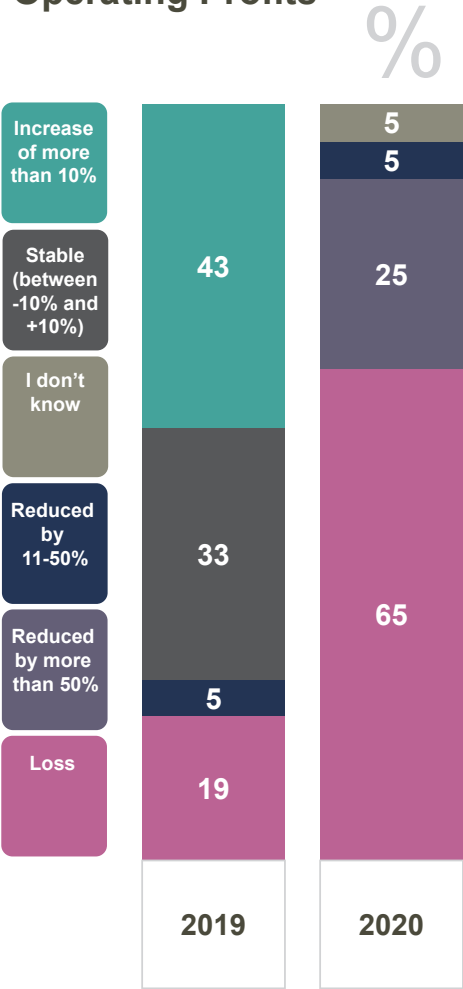




Revenue compared to 2019



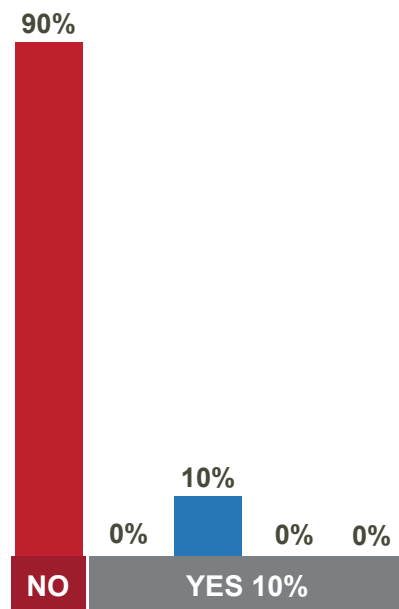
Operating Profits



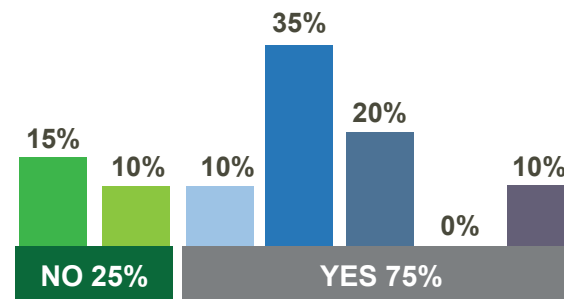
Detailed results for Mexico



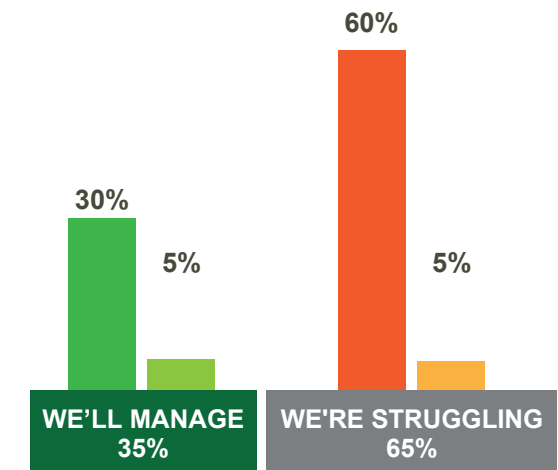
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
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- Yes, up to 75%
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- It will be hard, but we can keep our heads above water
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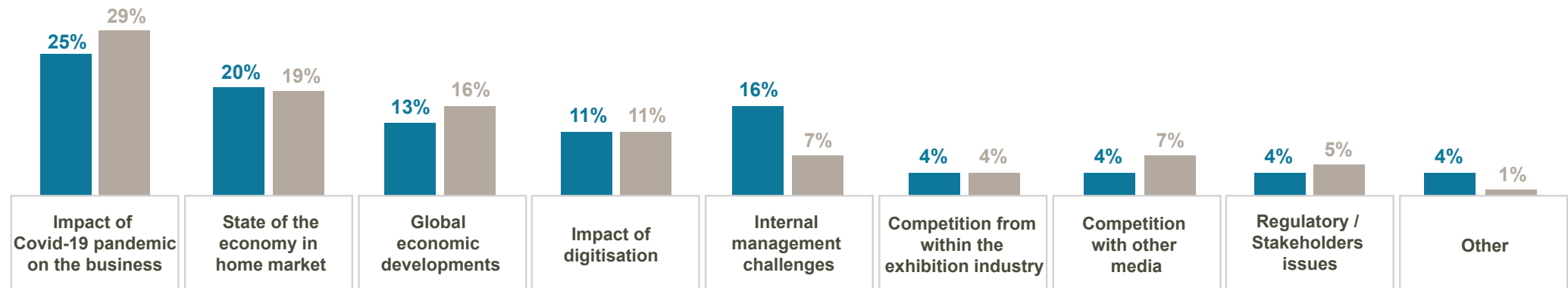
Detailed results for Mexico



Most important business issues in the exhibition industry

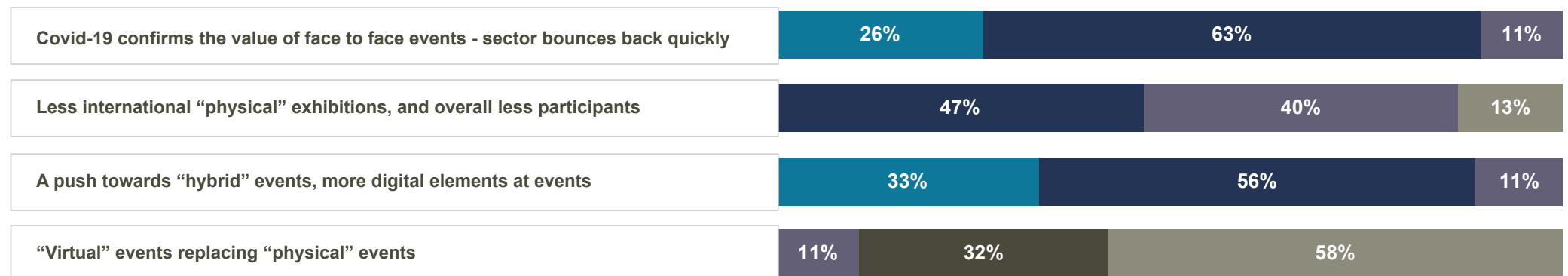
Mexico

Global



Format of exhibitions in the coming years

■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not

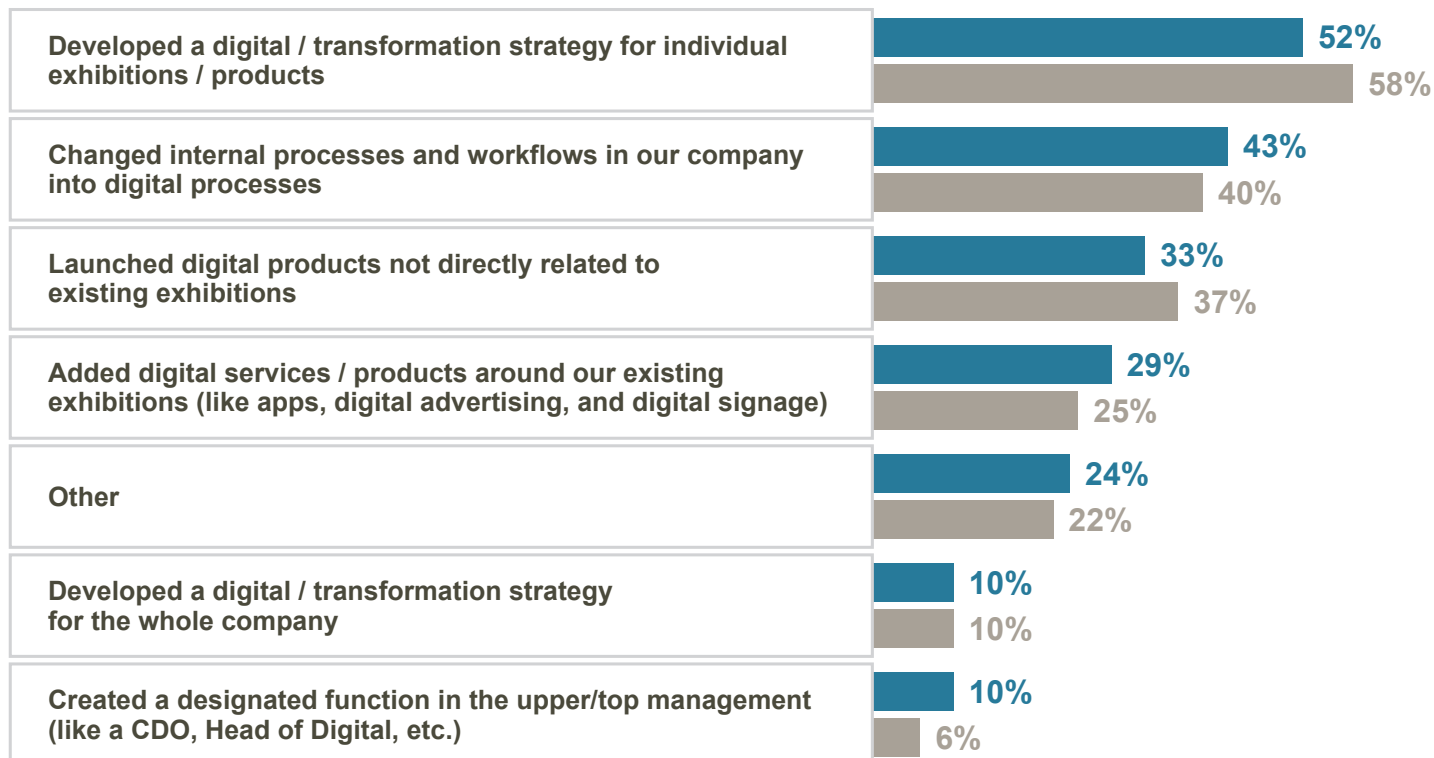




Mexico

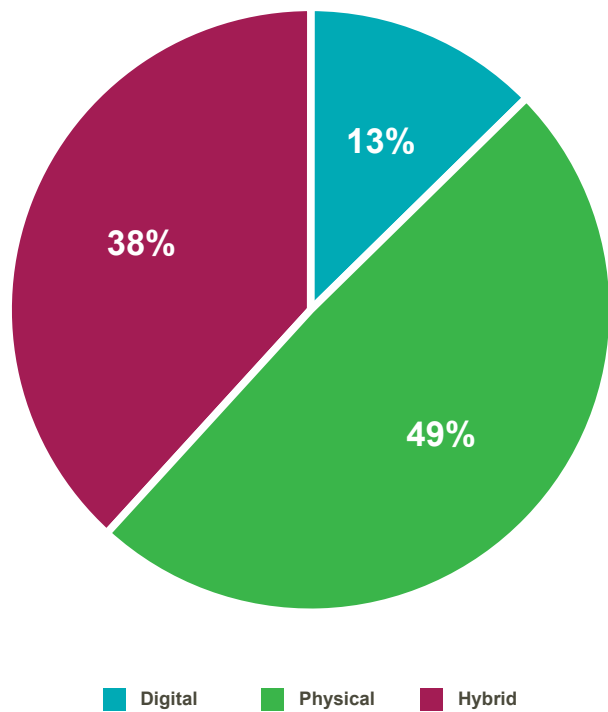
Global

Digitisation: implementation in Mexico and globally

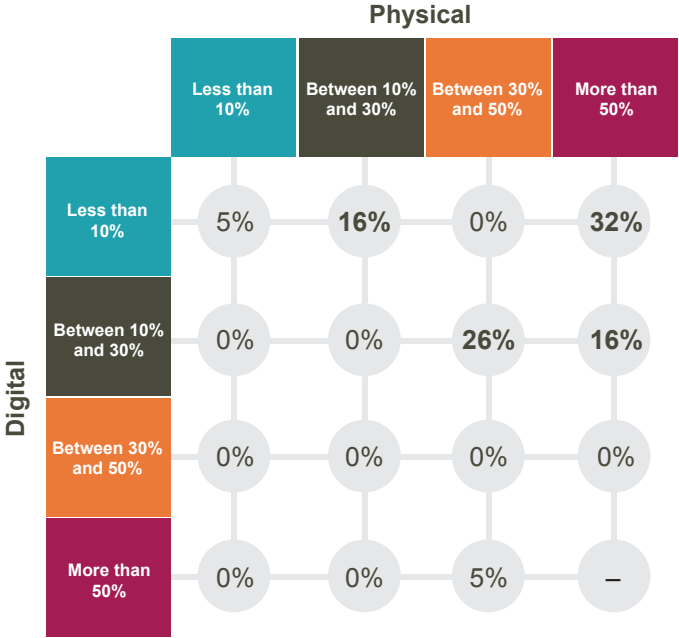




Number of fairs projected in 2021

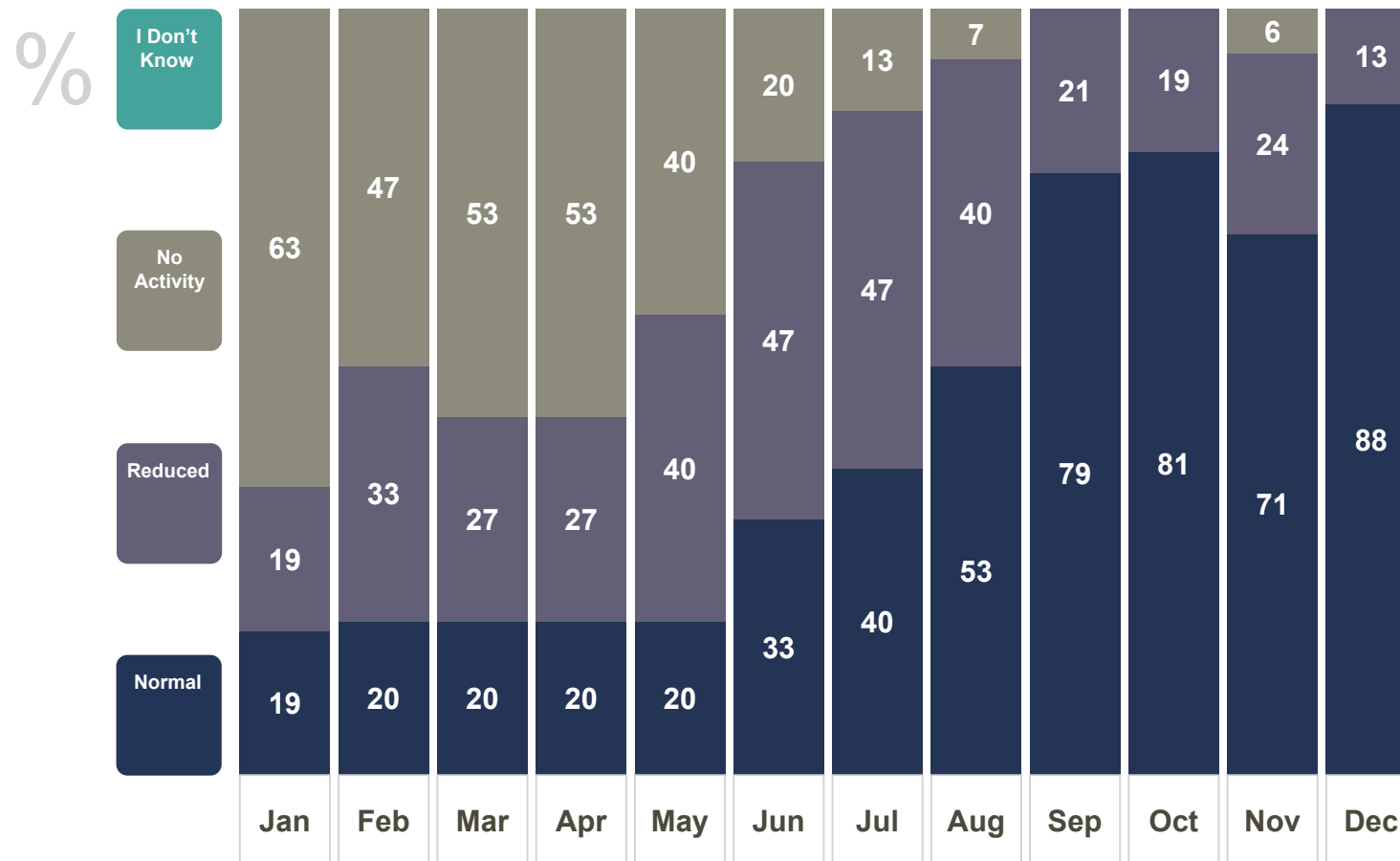


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



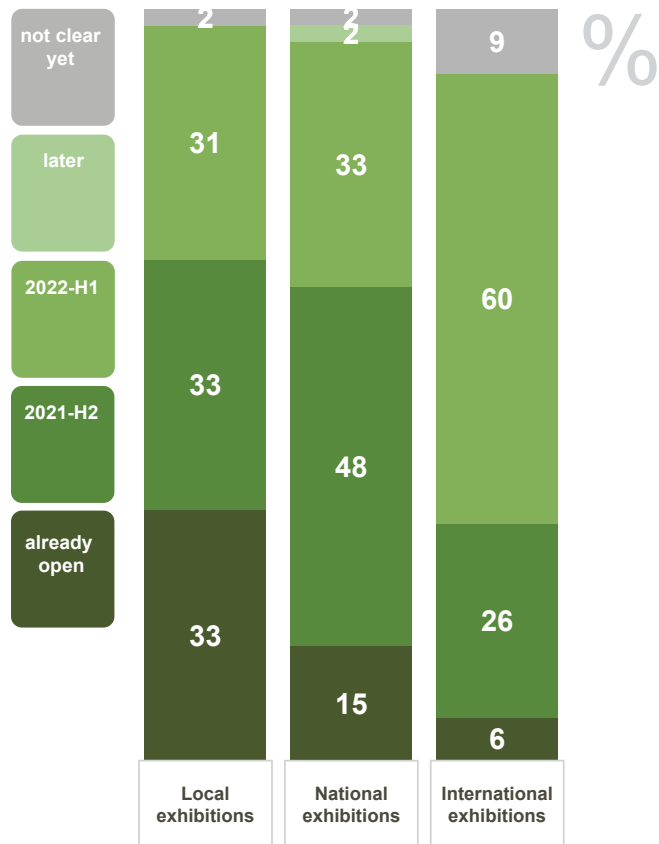


Situation of industry operations in 2021

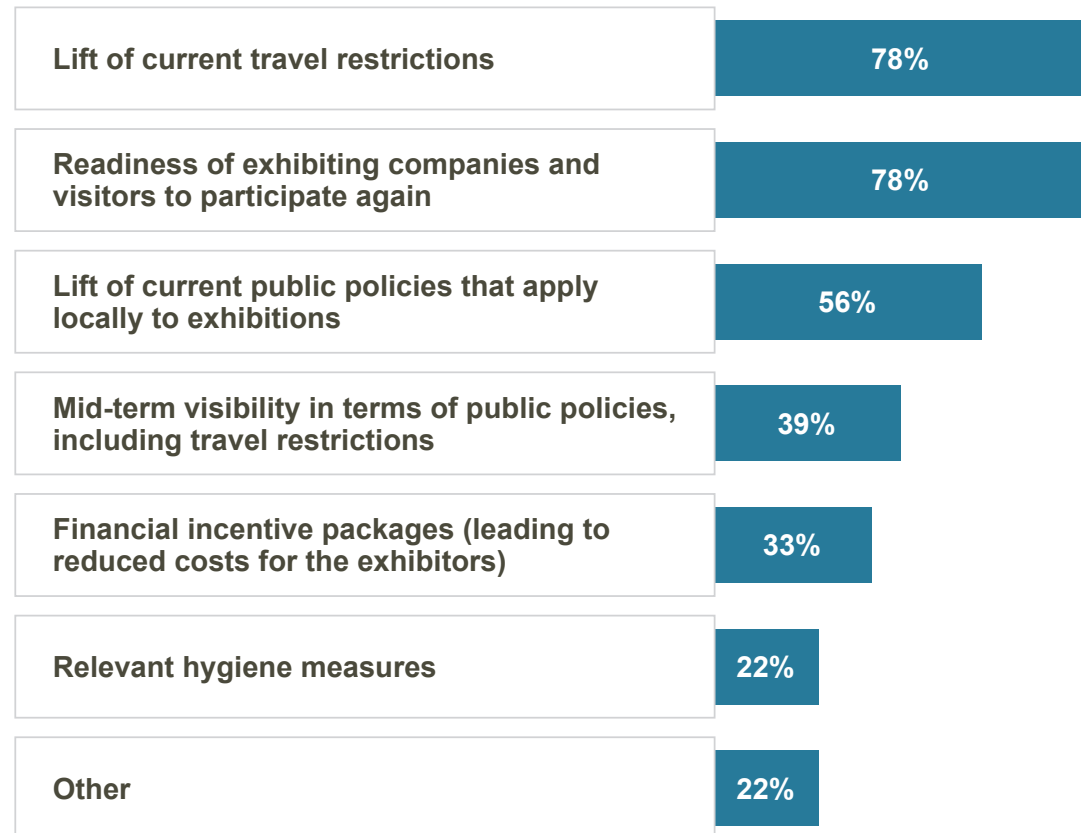




When do you believe exhibitions will open again in your city?



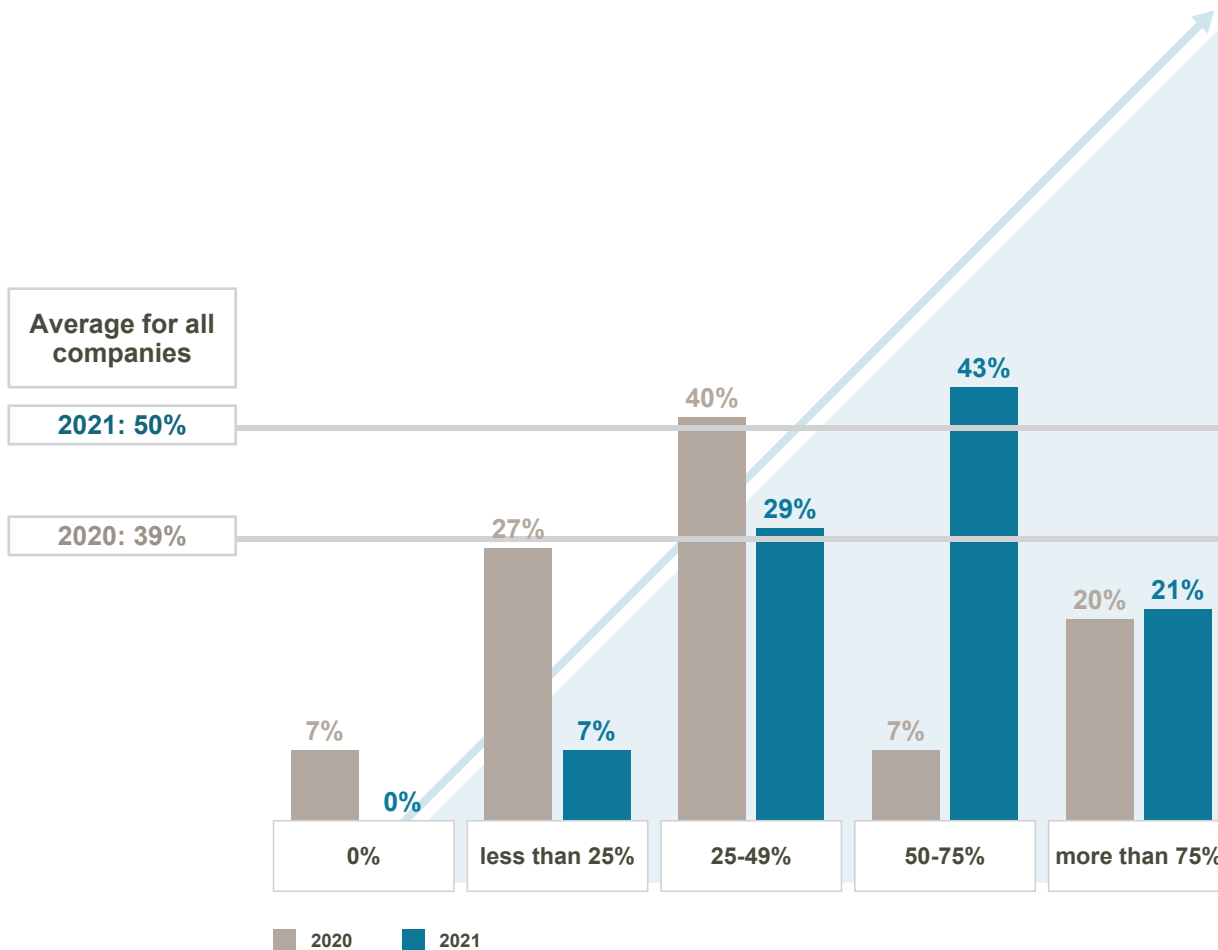
What do you believe would most help the “bounce back” of exhibitions?



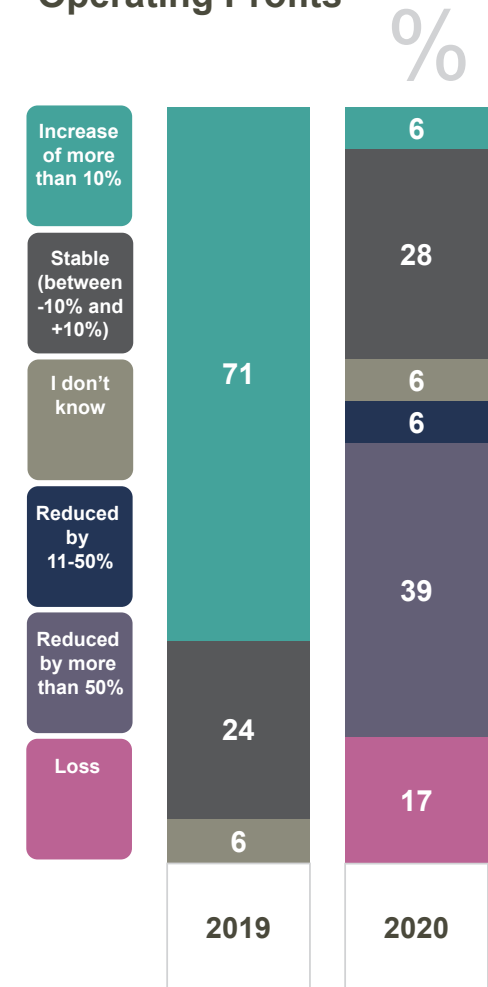
Detailed results for US



Revenue compared to 2019



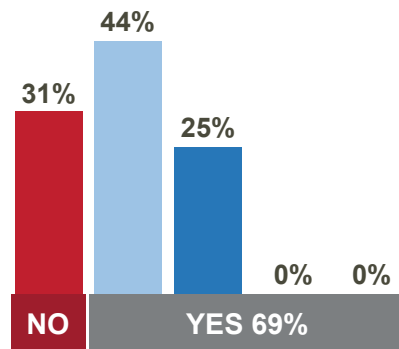
Operating Profits



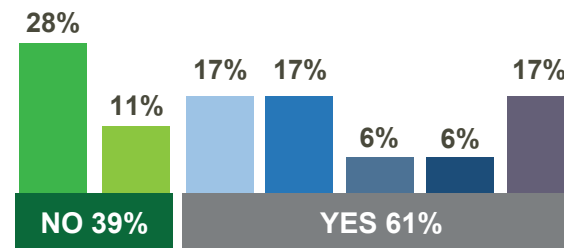
Detailed results for US



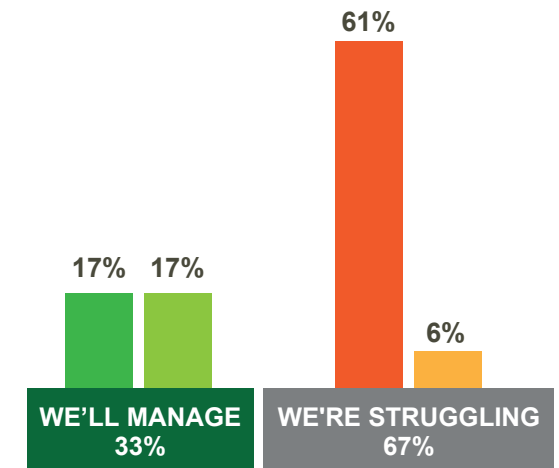
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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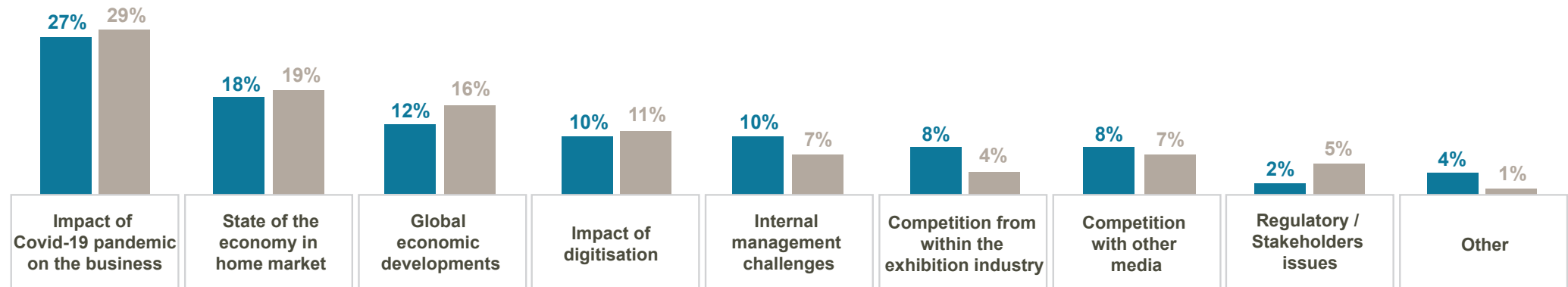
Detailed results for US



Most important business issues in the exhibition industry

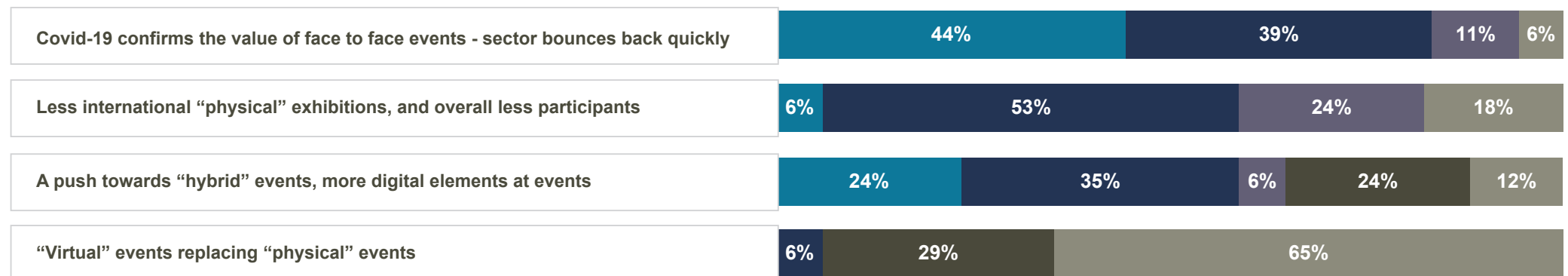
USA

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

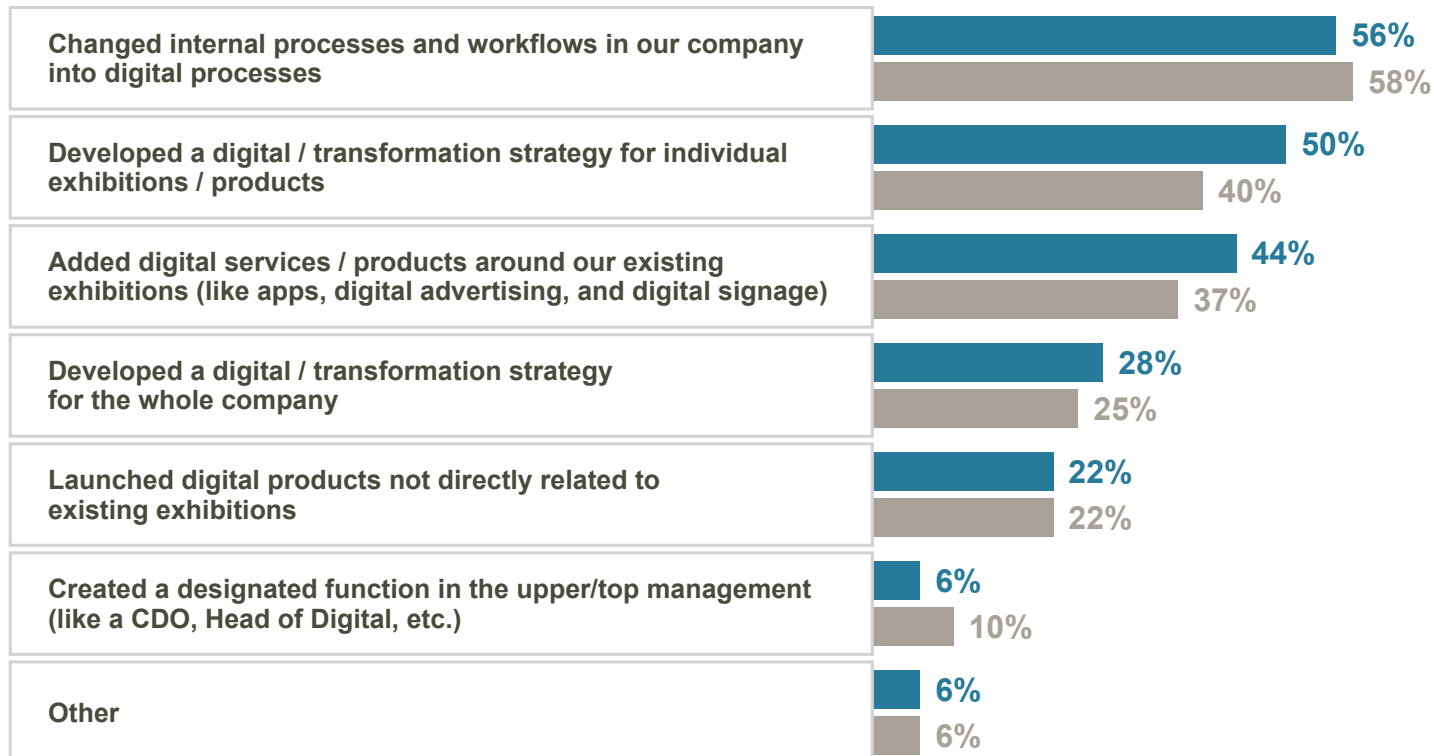




USA

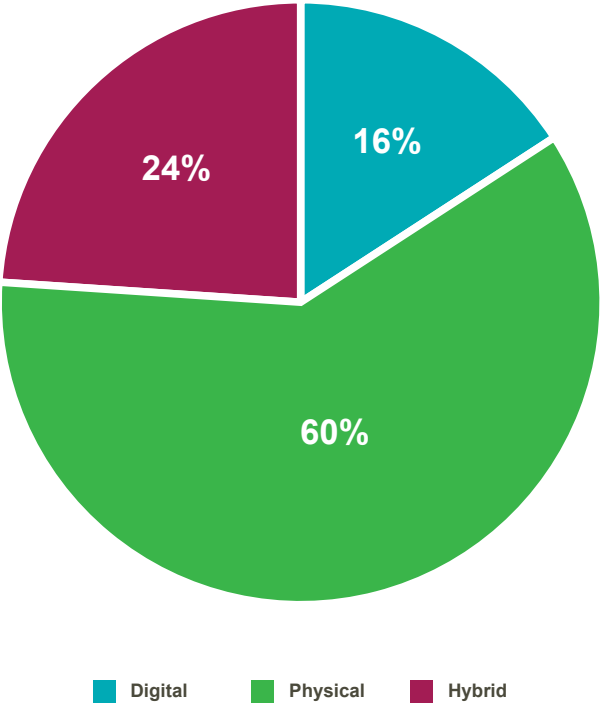
Global

Digitisation: implementation in USA and globally

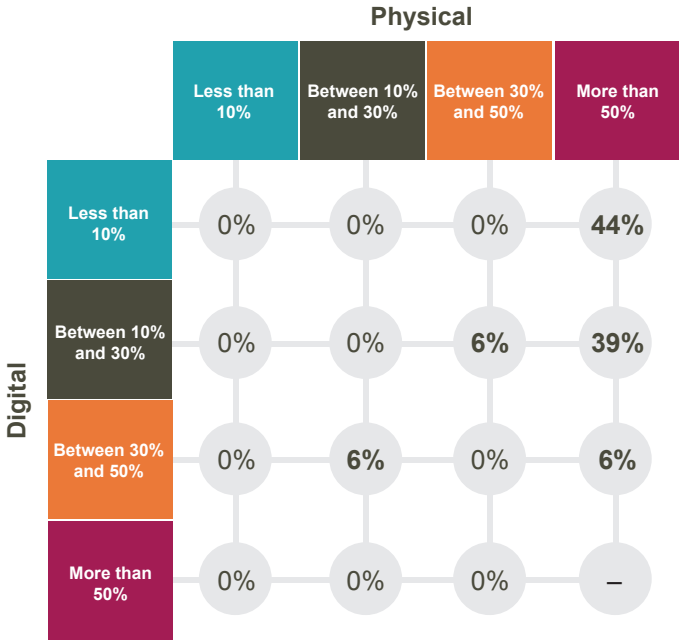




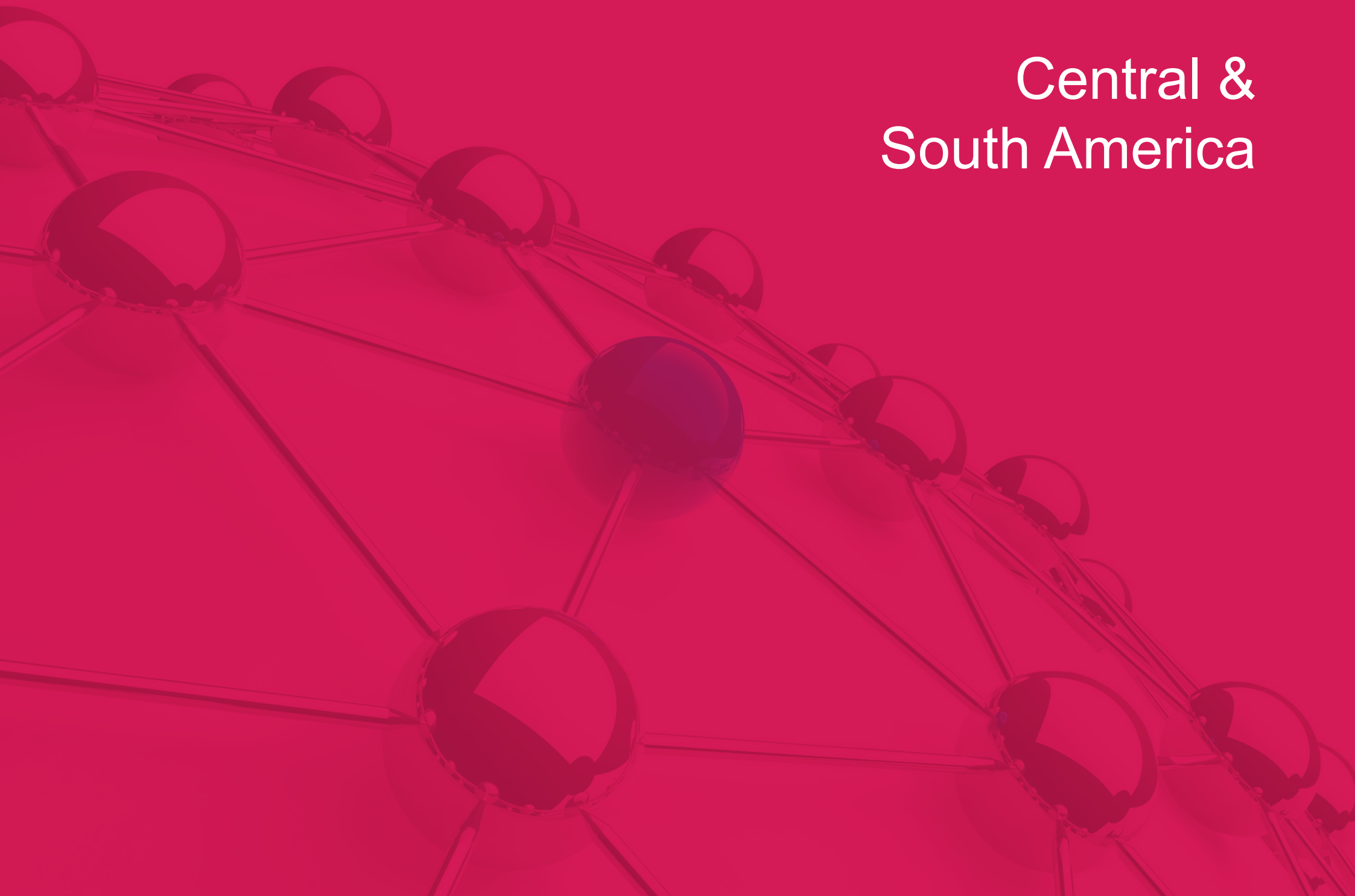
Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



Central & South America



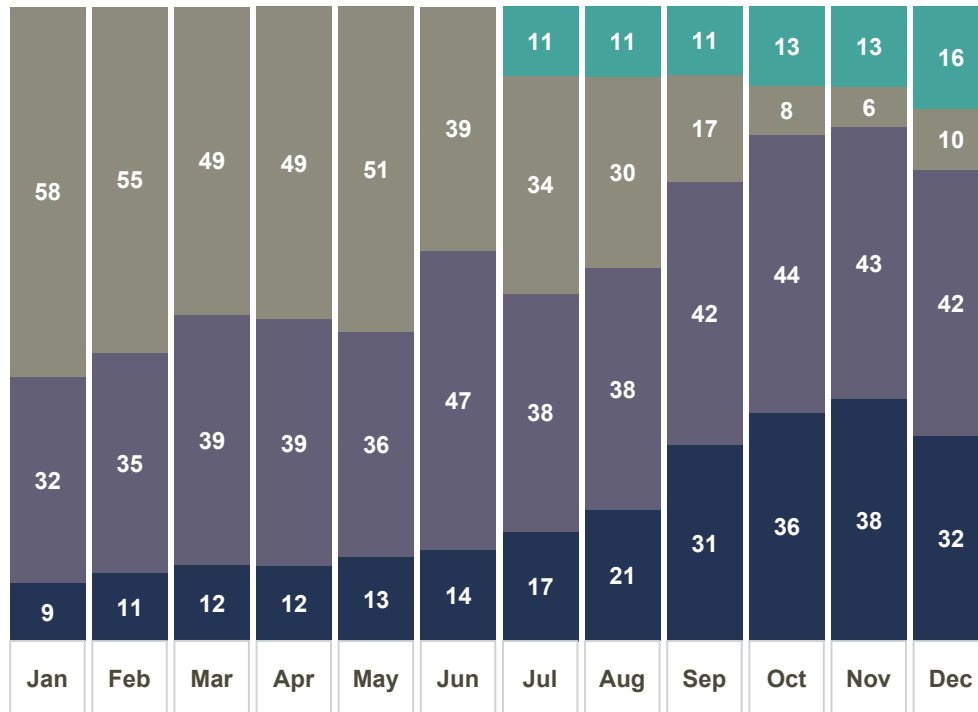
Operations - Reopening Exhibitions Central & South America



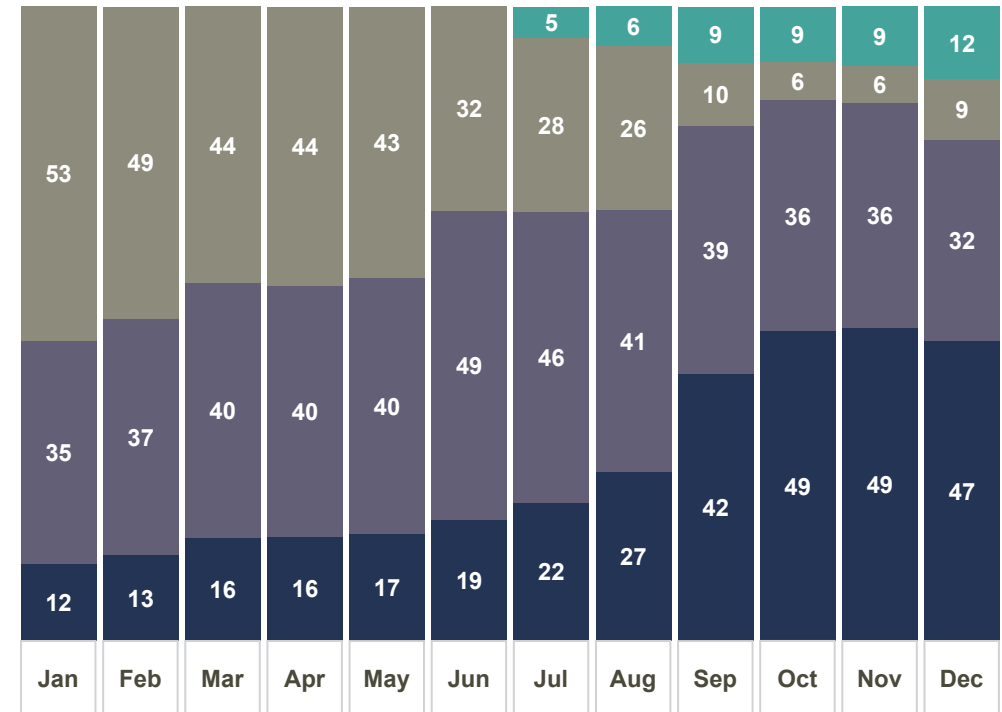
Situation of industry operations in 2021



Central & South America



World

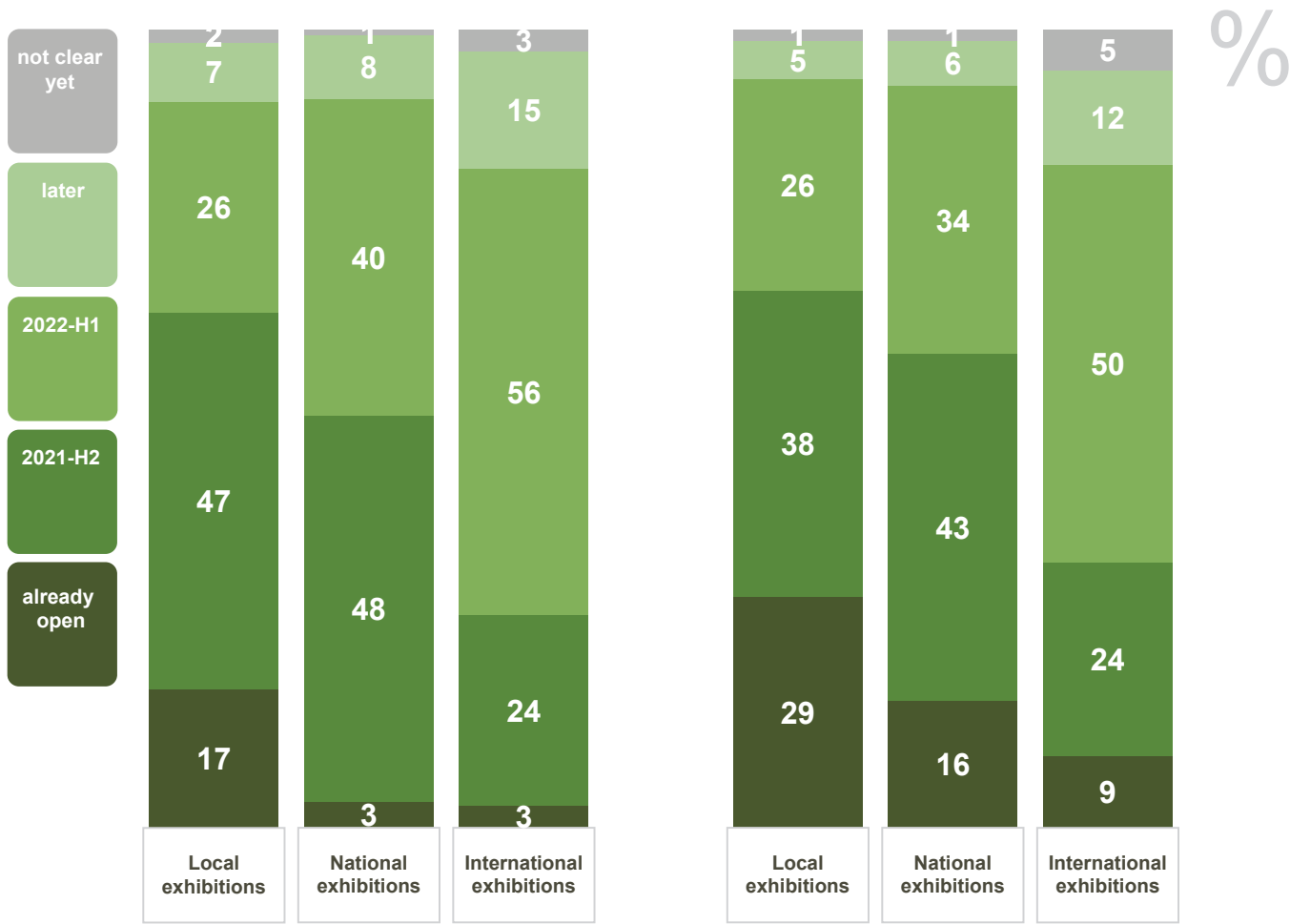




When do you believe
exhibitions will open
again in your city?

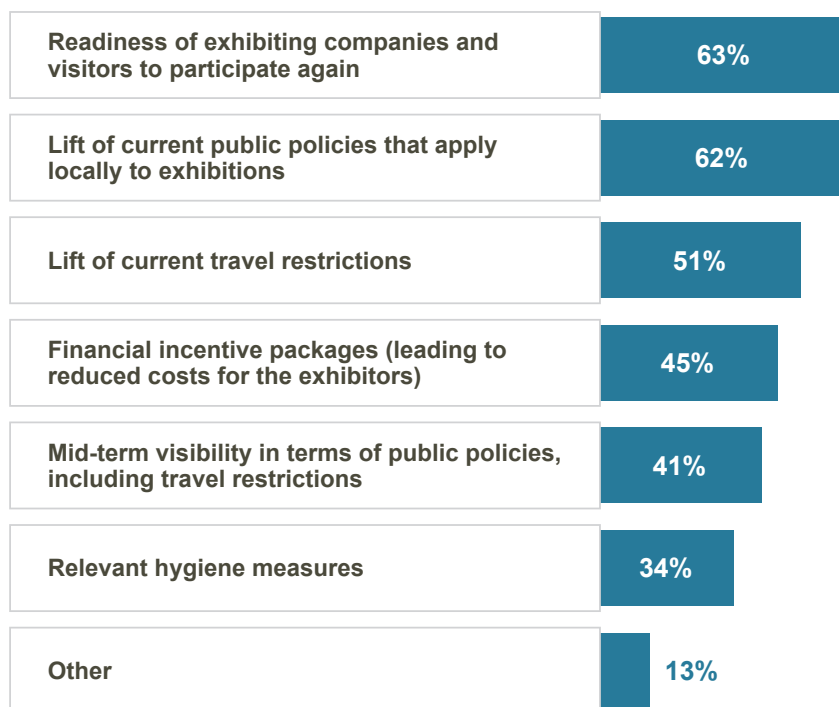
Central & South America

World

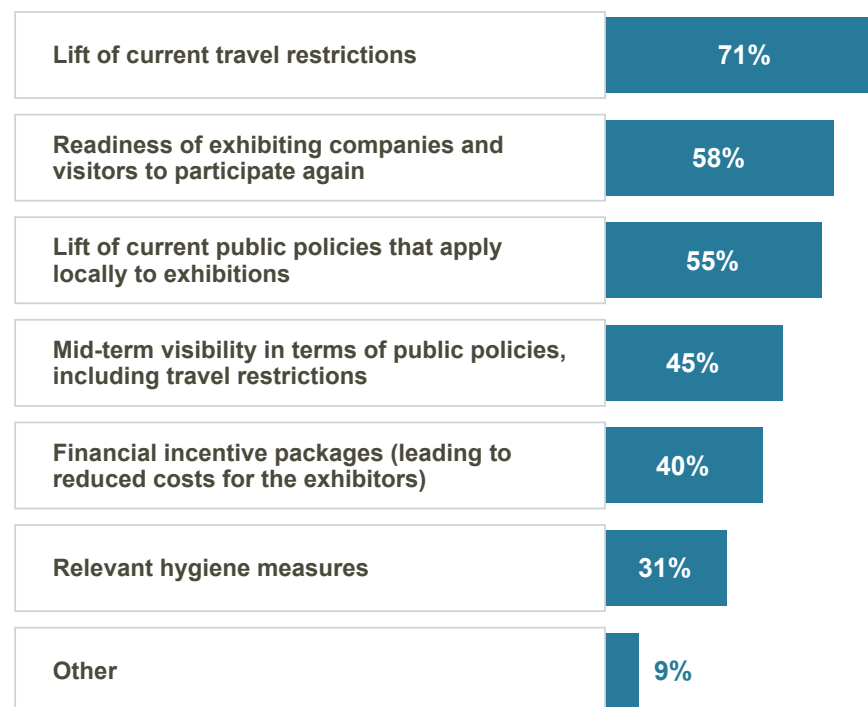


What do you believe would most help the “bounce back” of exhibitions?

Central & South America

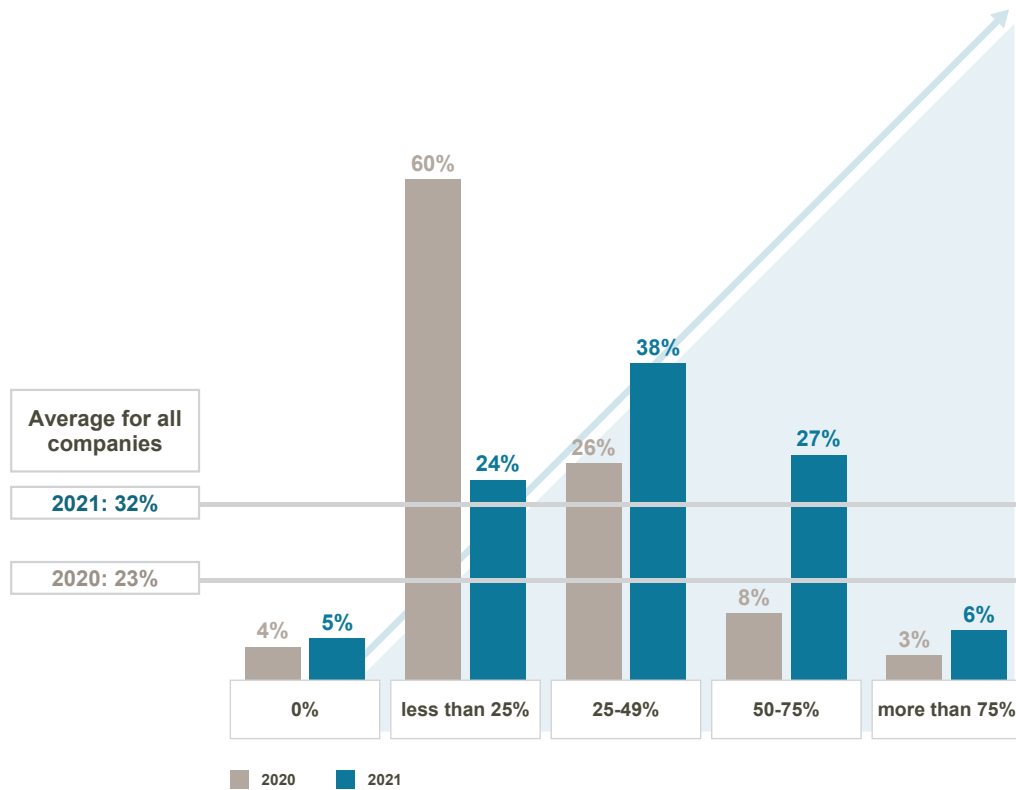


World

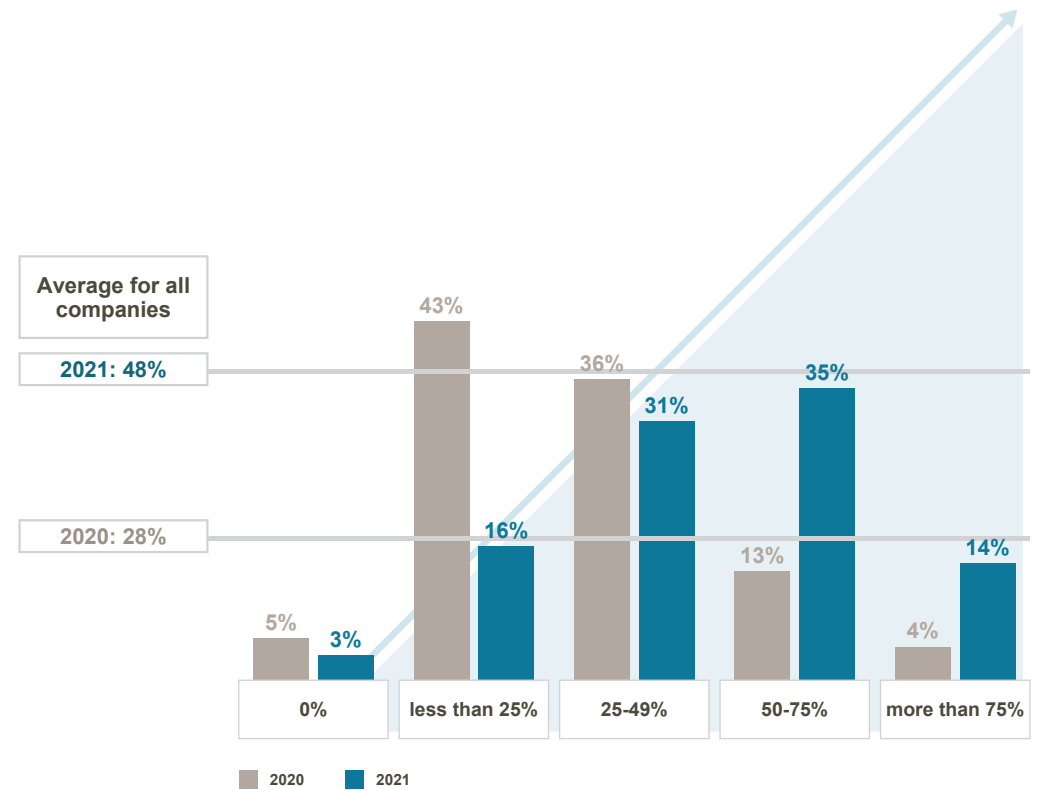


Turnover Central & South America

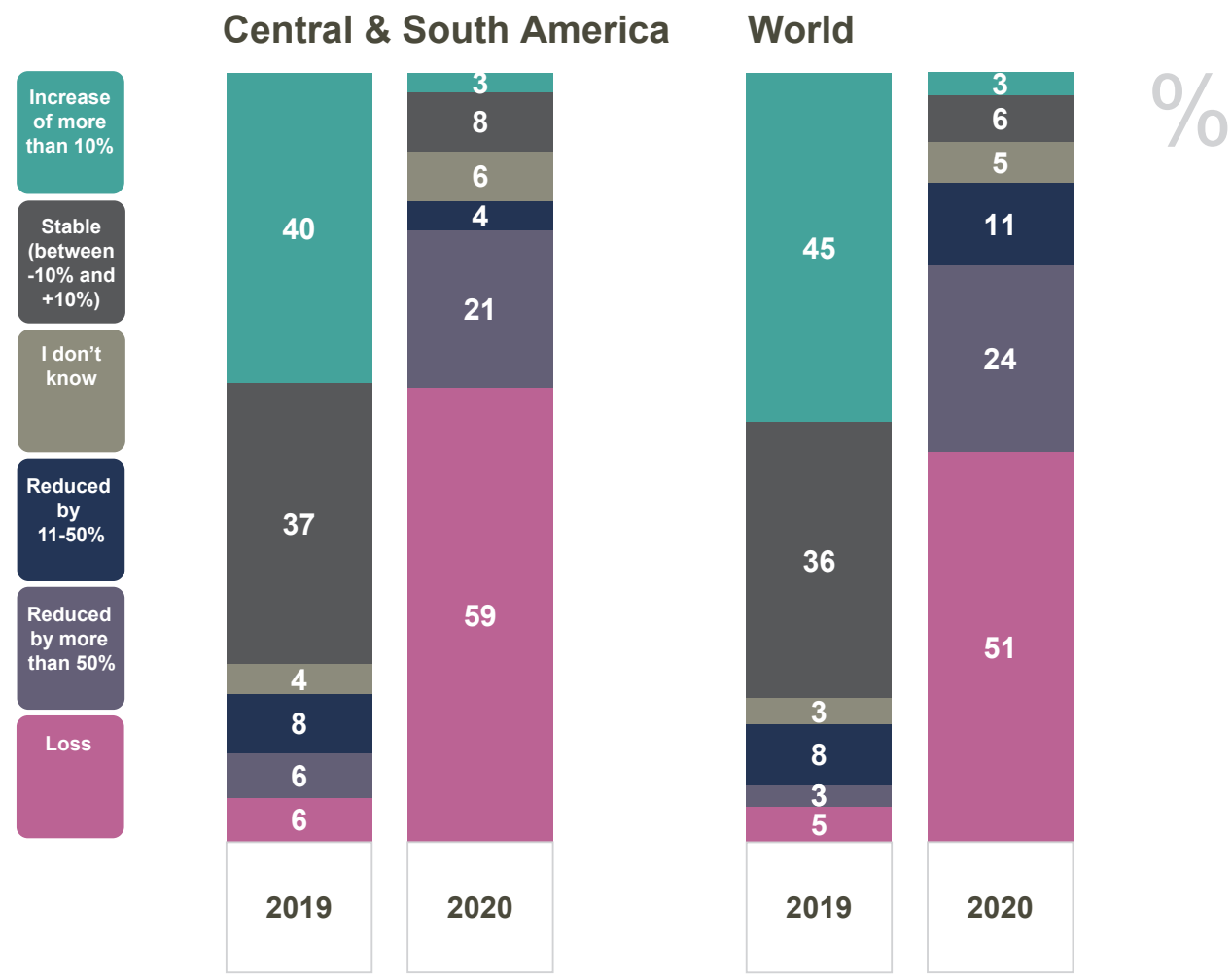
Revenue compared to 2019 Central & South America



World



Operating Profits Central & South America

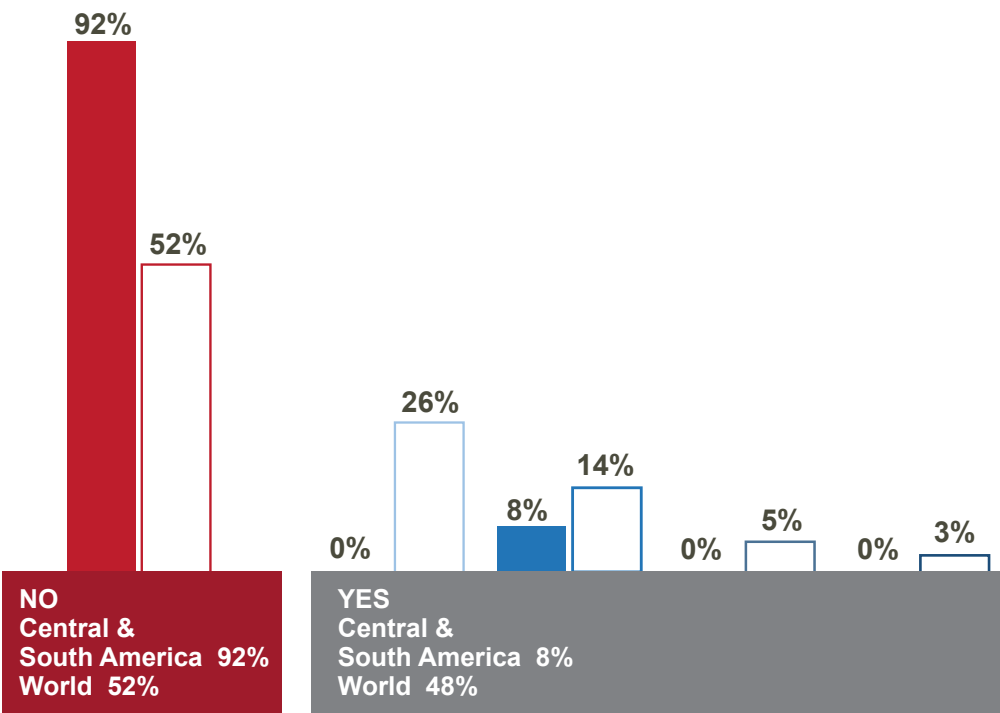


Did your company benefit from public financial support?

Central & South America

World

- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
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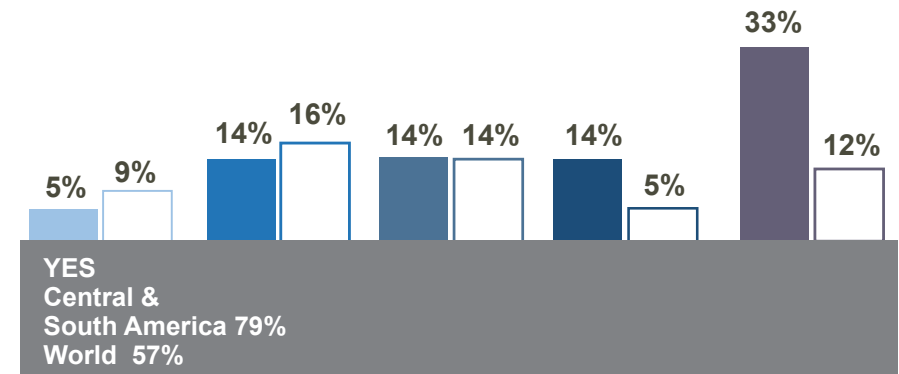
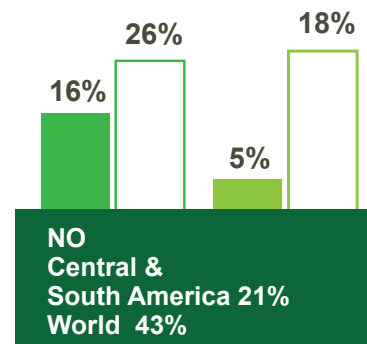


Have you had to reduce your workforce?

Central & South America

World

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
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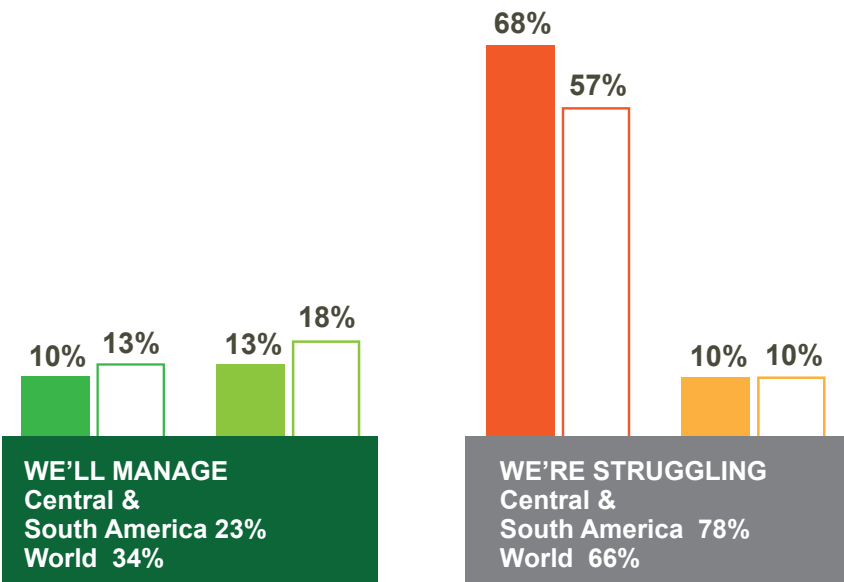


If there is no business for the next 6 months,
which best applies?

Central & South America

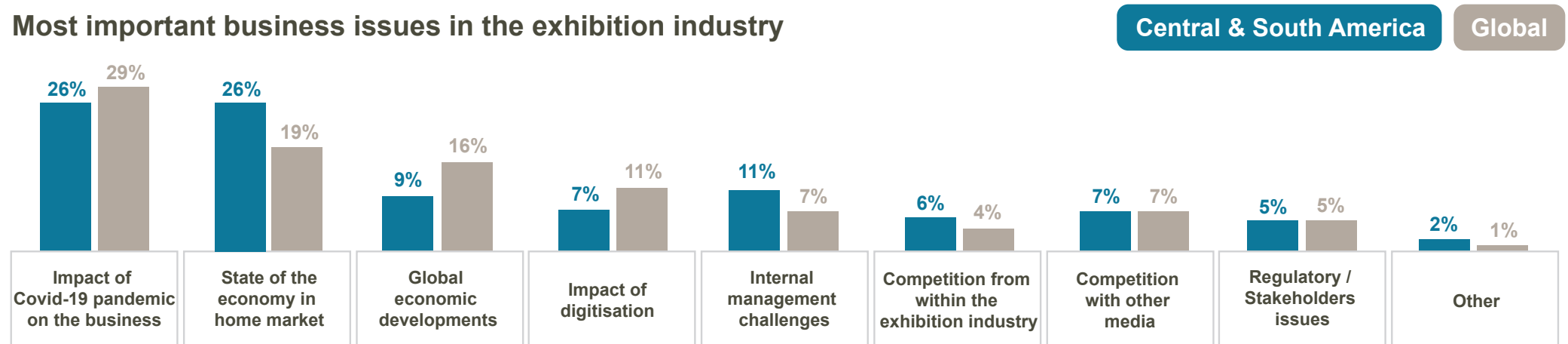
World

- It's okay, we have extended our offering to other profitable work areas
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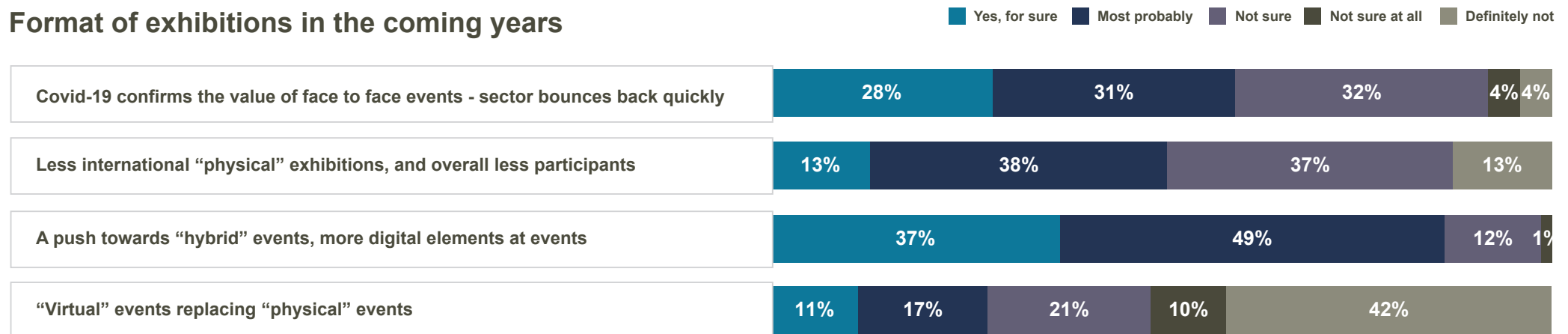


Most Important Business Issues - Format of Exhibitions - Central & South America

Most important business issues in the exhibition industry



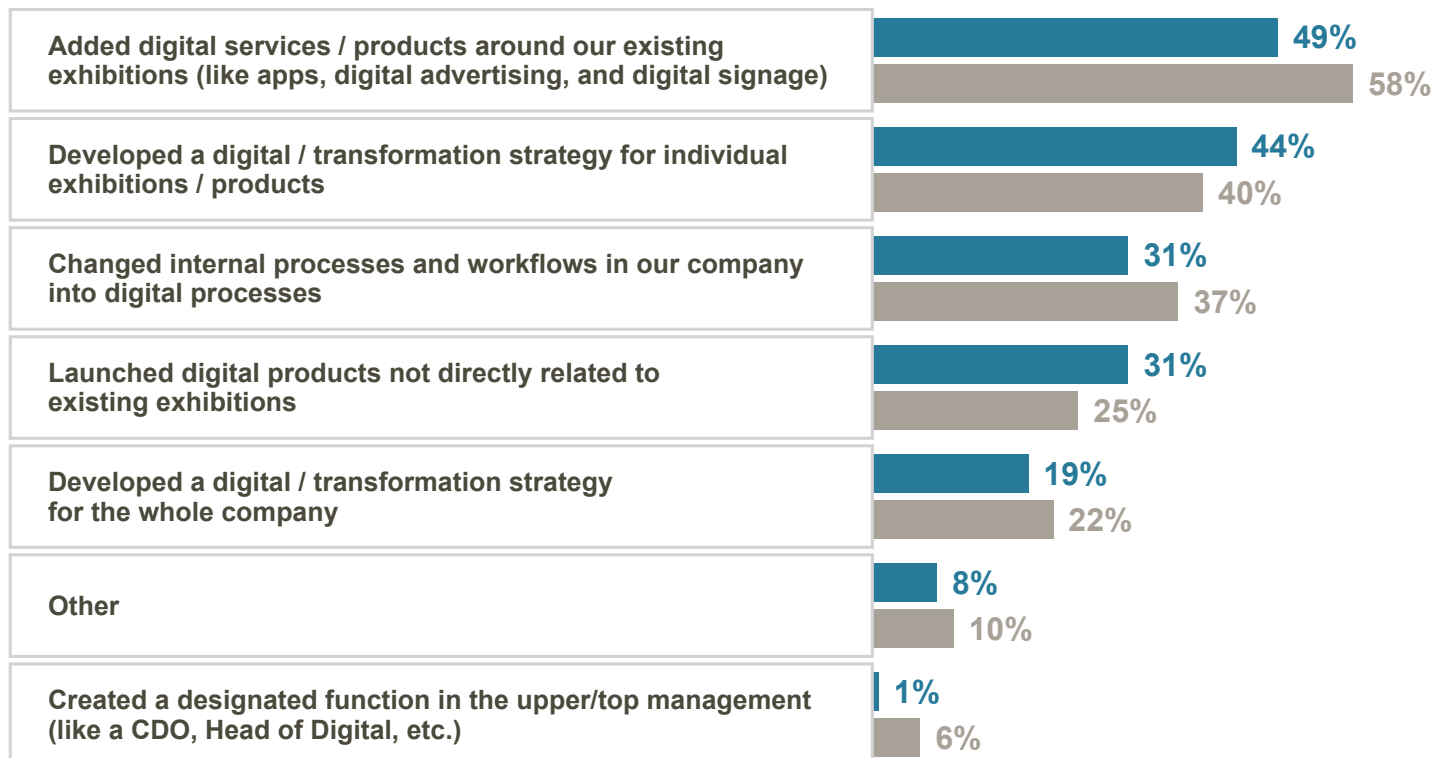
Format of exhibitions in the coming years



Central & South America

Global

Digitisation: implementation in Central and South America and globally

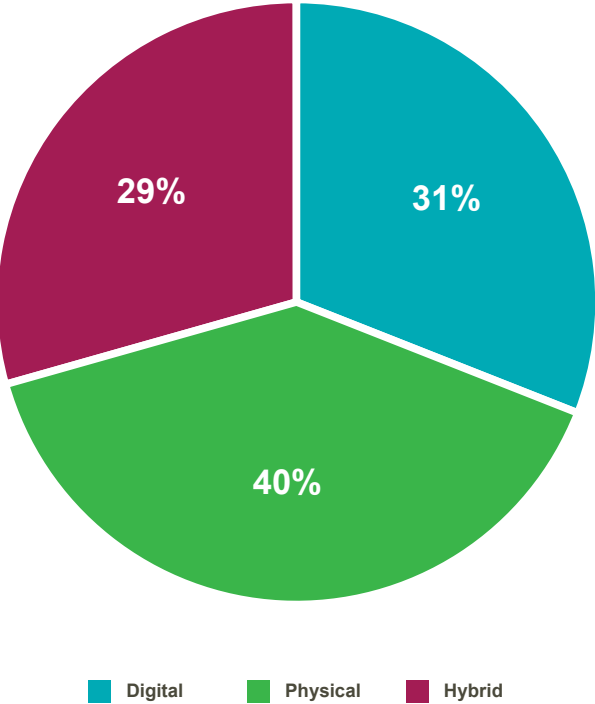


Number of fairs projected in 2021

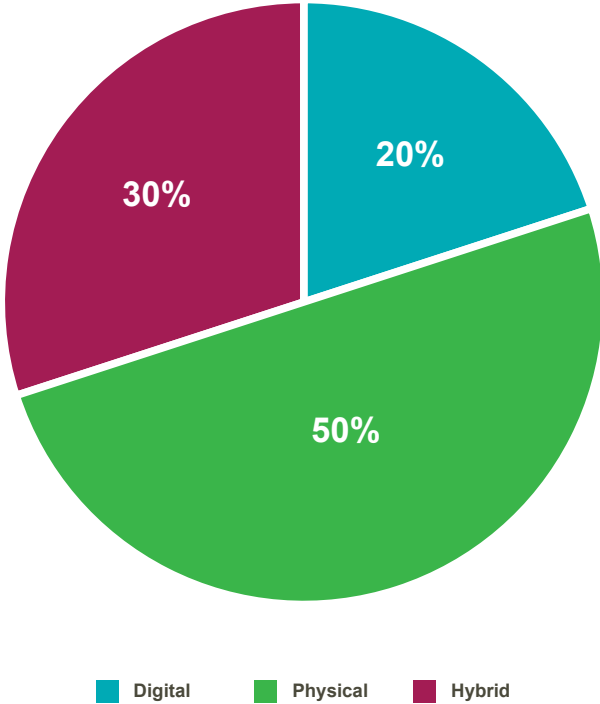
Central & South America



Central & South America



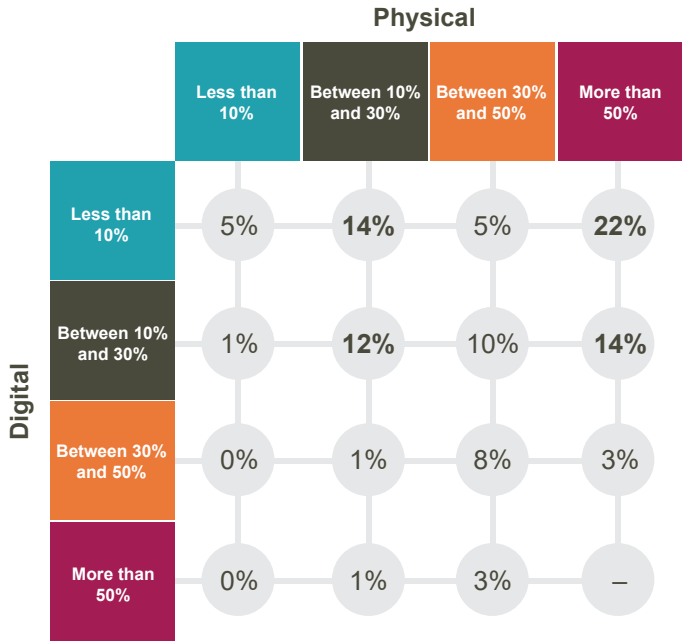
World



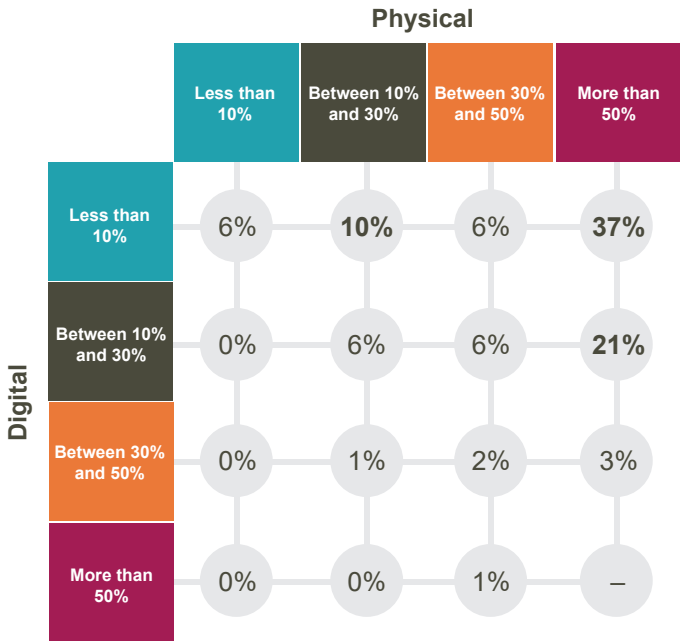
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



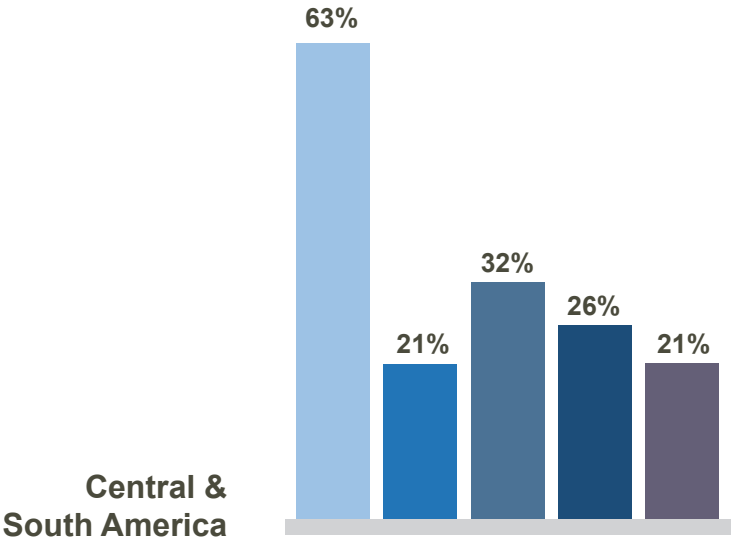
Central & South America



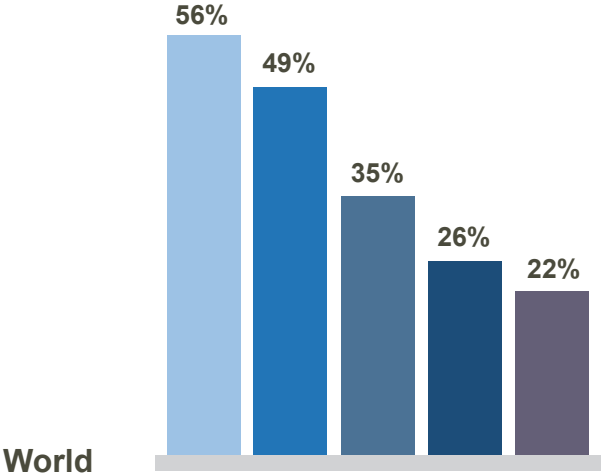
World



Expanded activities (for venues only) Central & South America



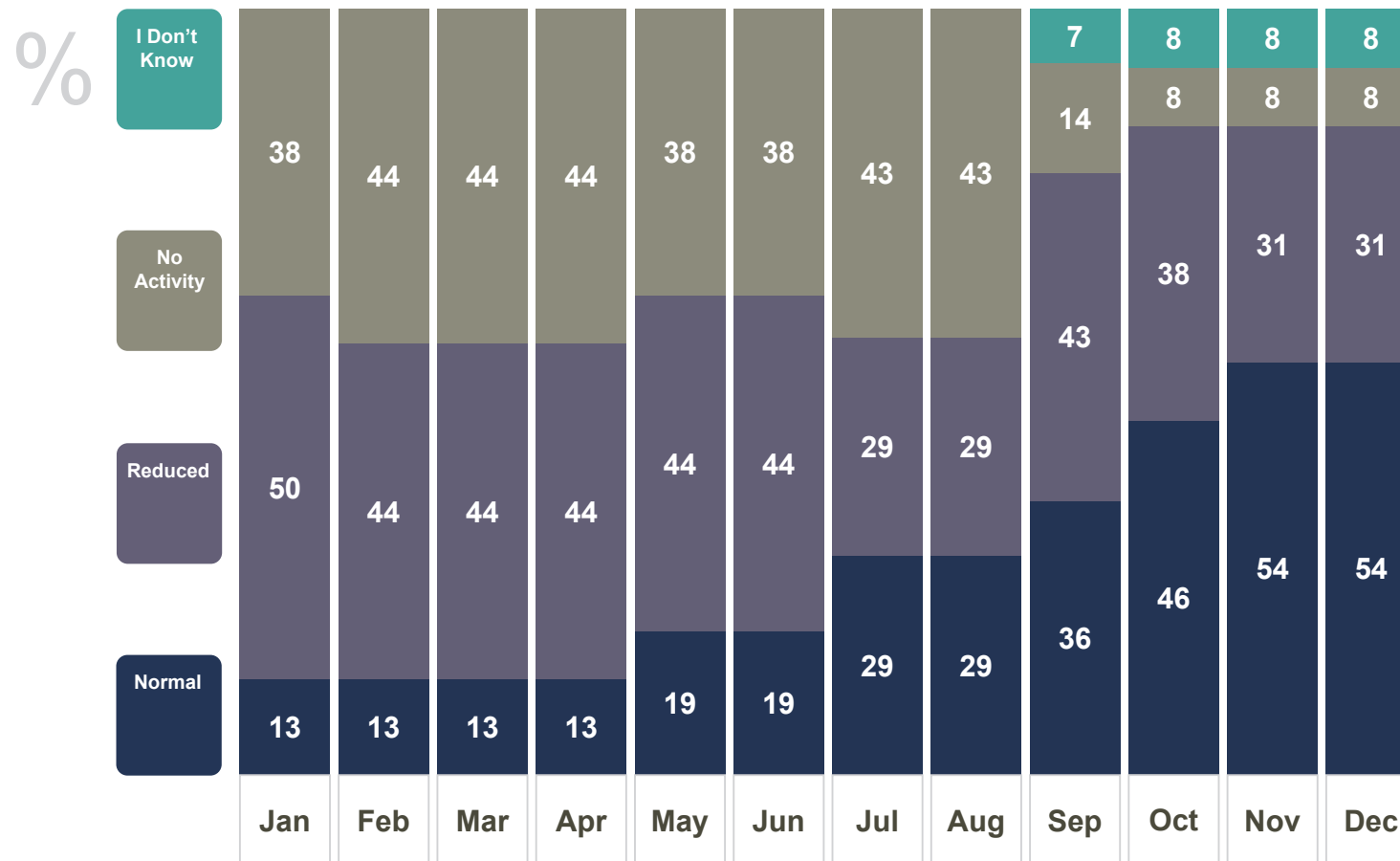
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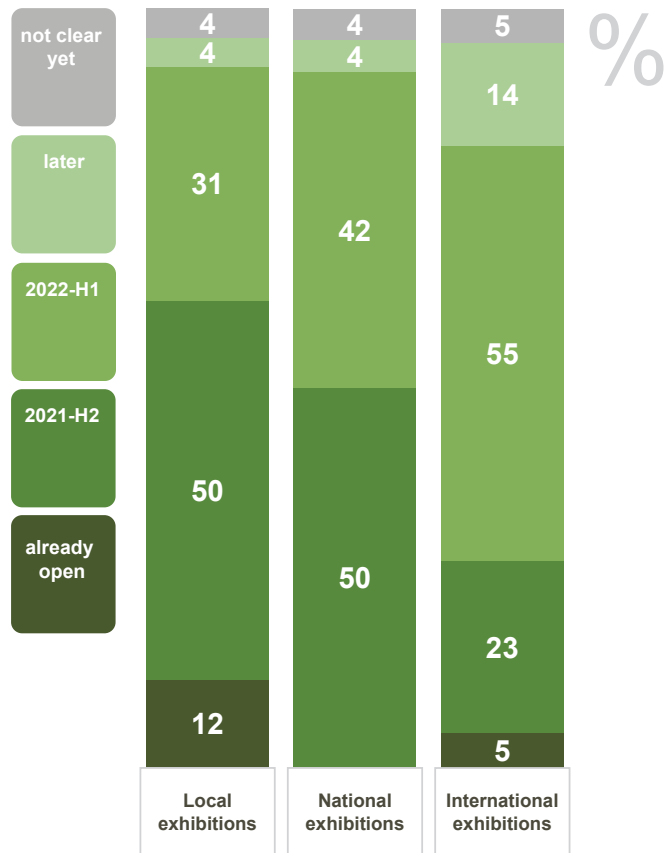
Situation of industry operations in 2021



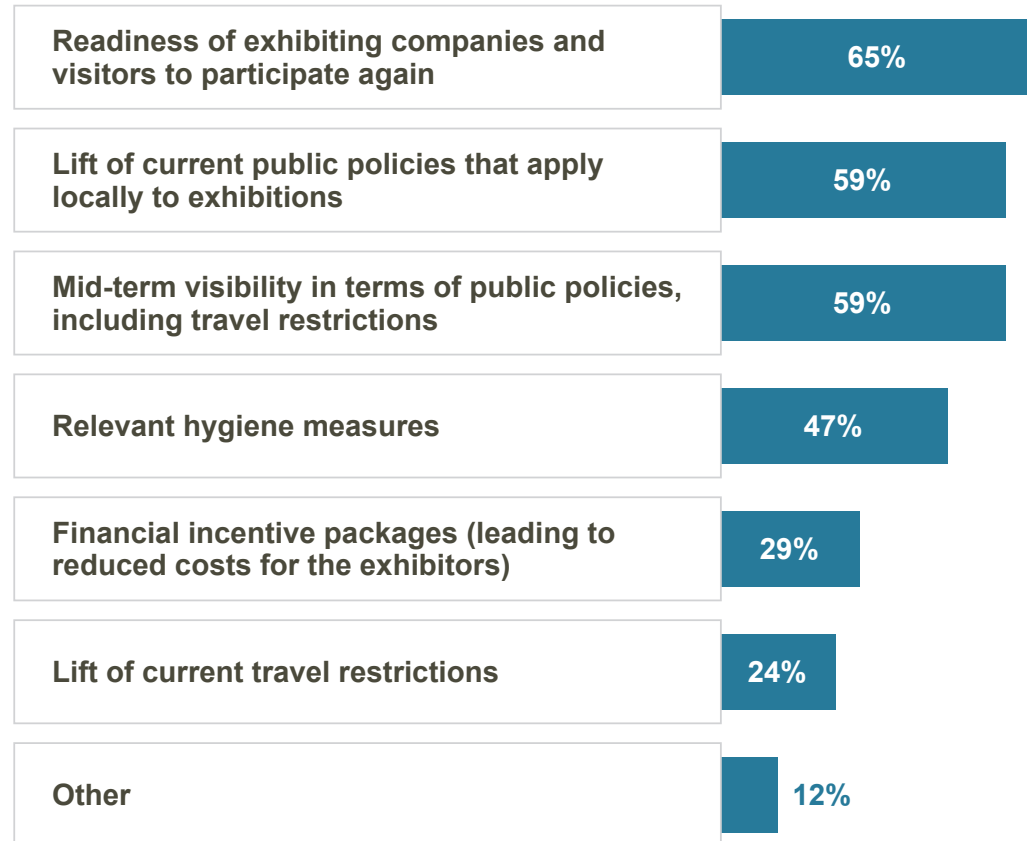
Detailed results for Brazil



When do you believe exhibitions will open again in your city?



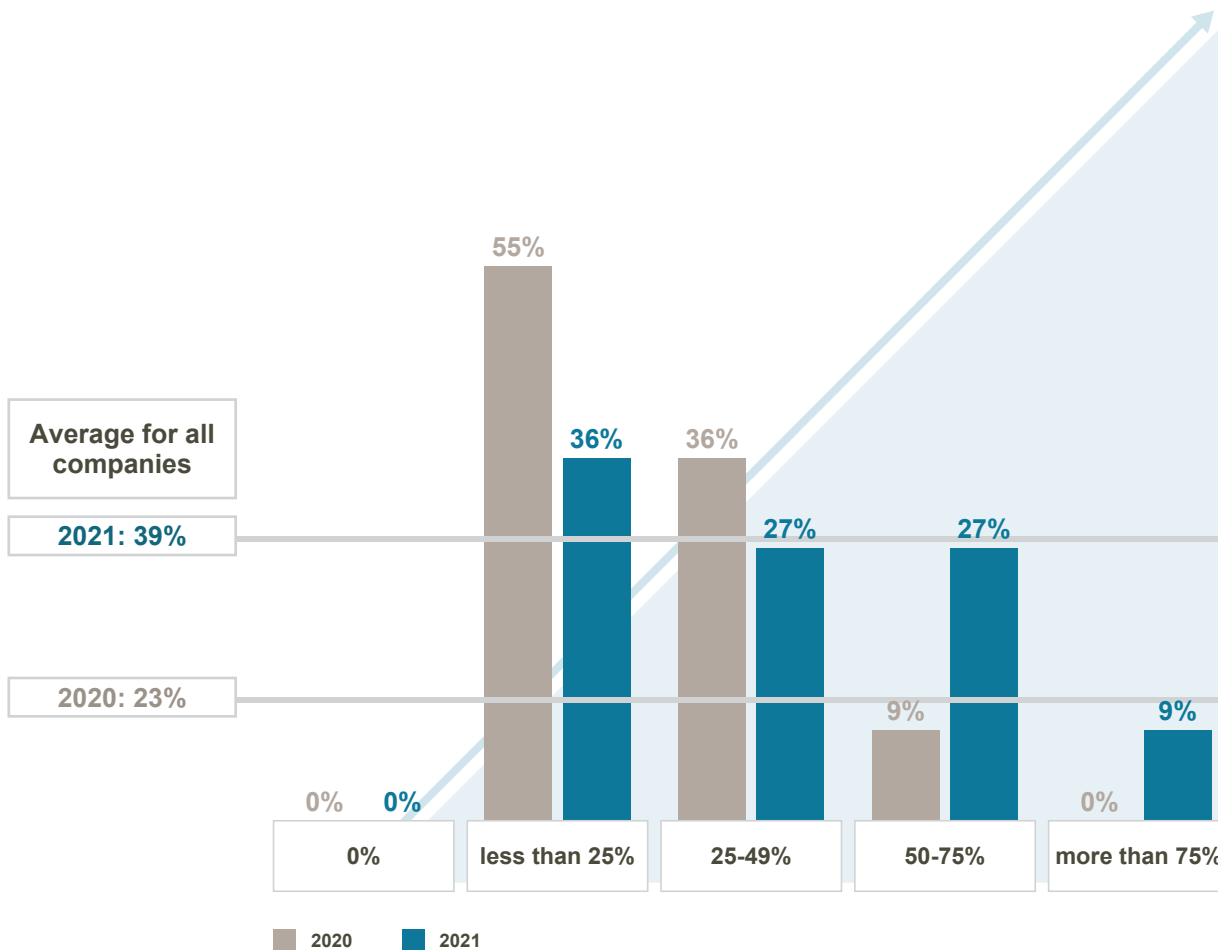
What do you believe would most help the “bounce back” of exhibitions?



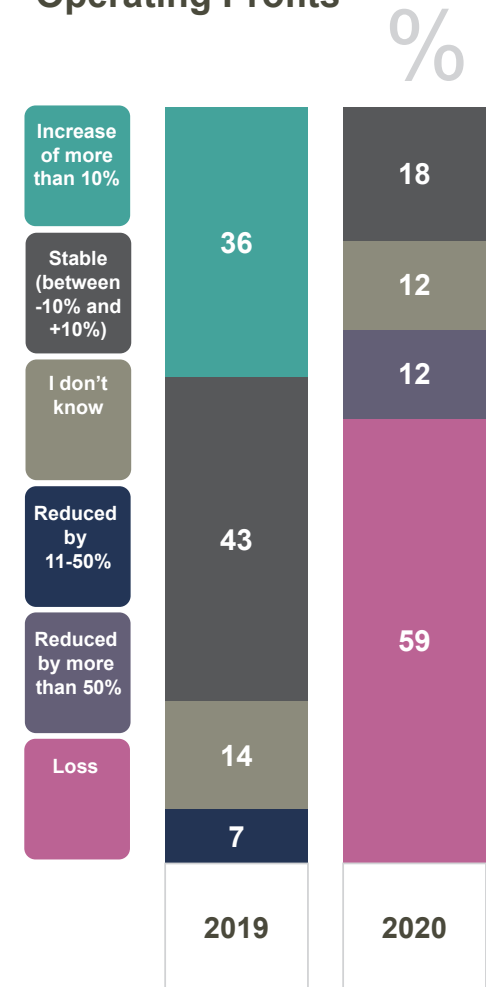
Detailed results for Brazil



Revenue compared to 2019



Operating Profits



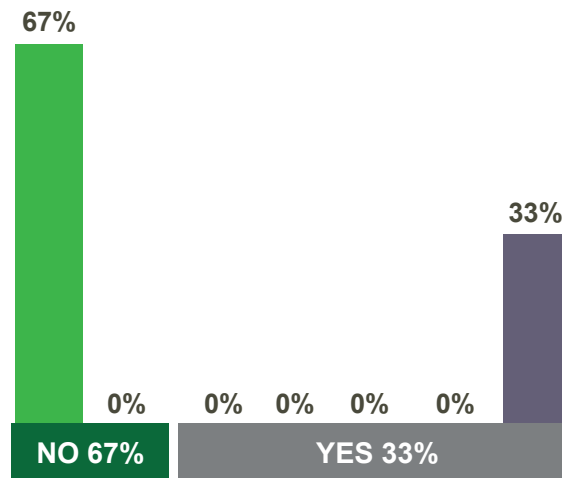
Detailed results for Brazil



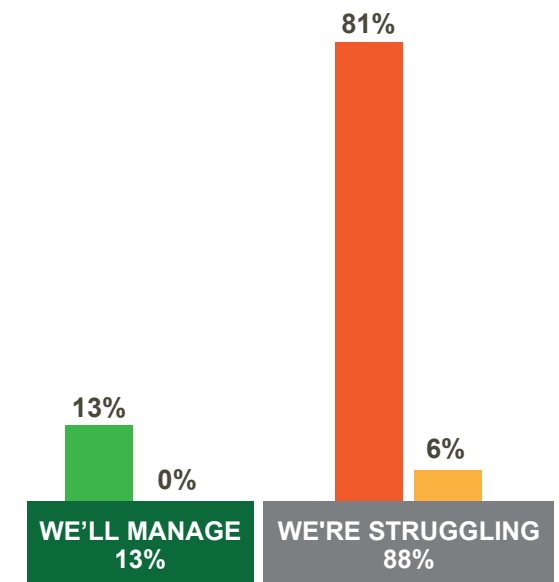
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Have you had to reduce your workforce?



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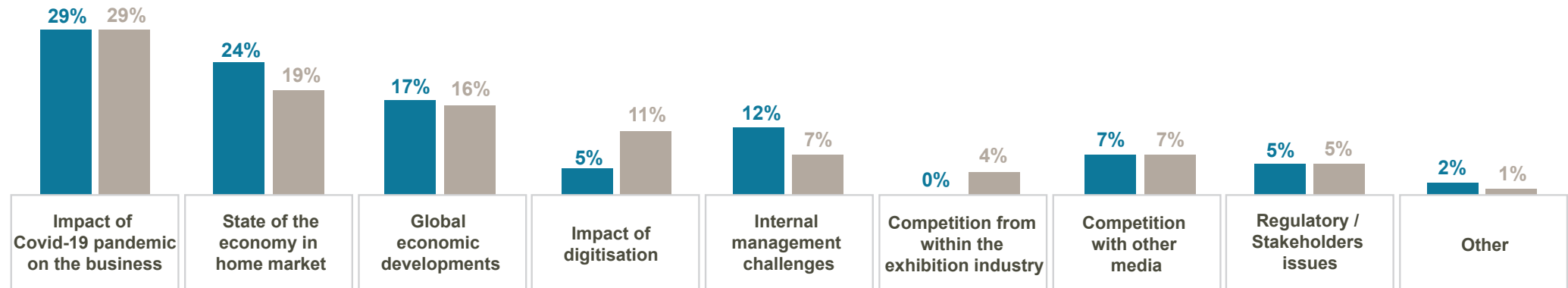
Detailed results for Brazil



Most important business issues in the exhibition industry

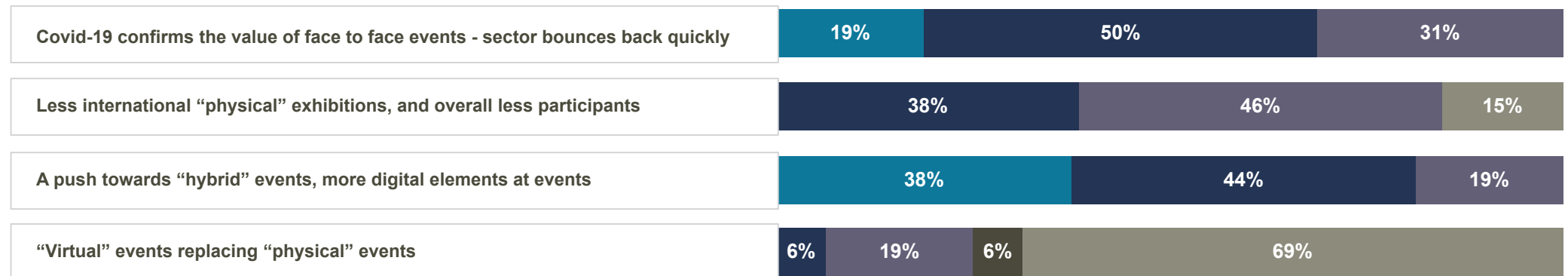
Brazil

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

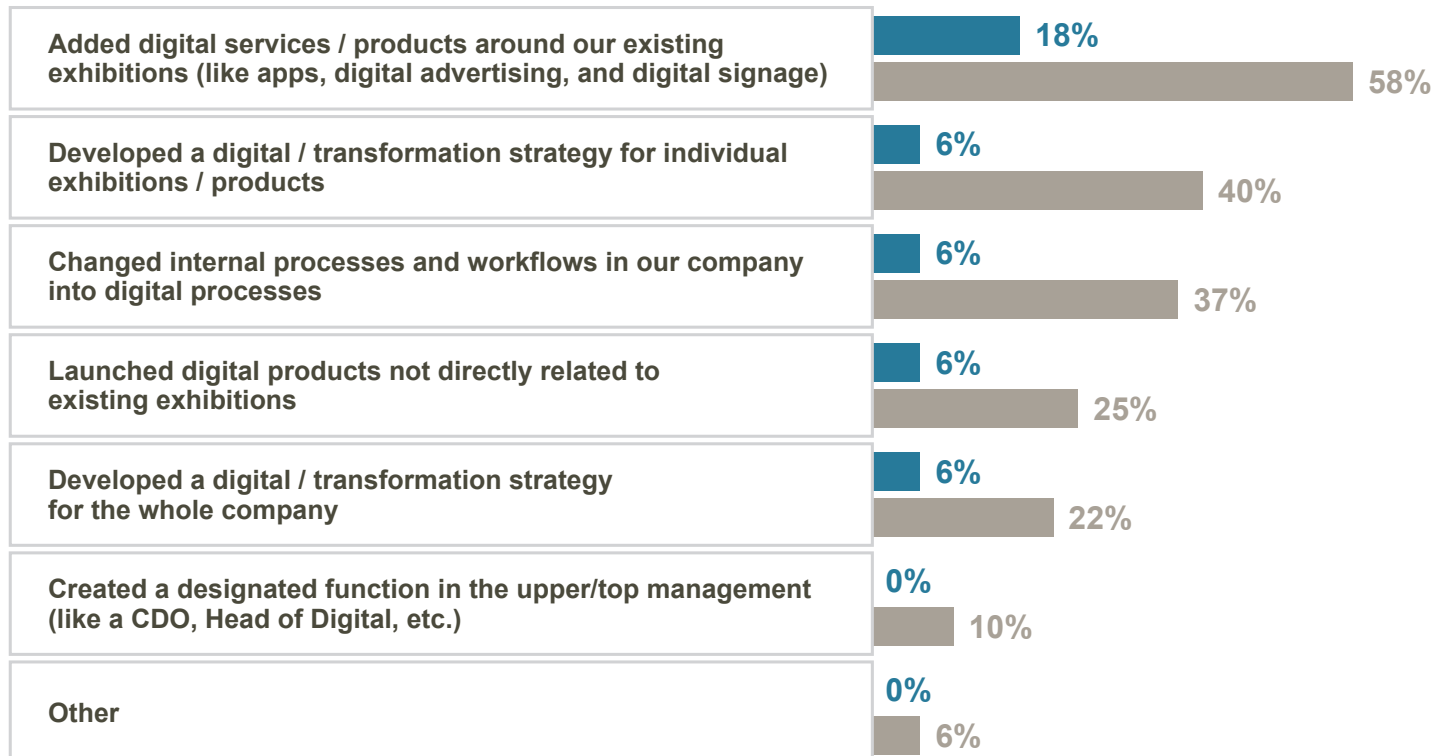




Brazil

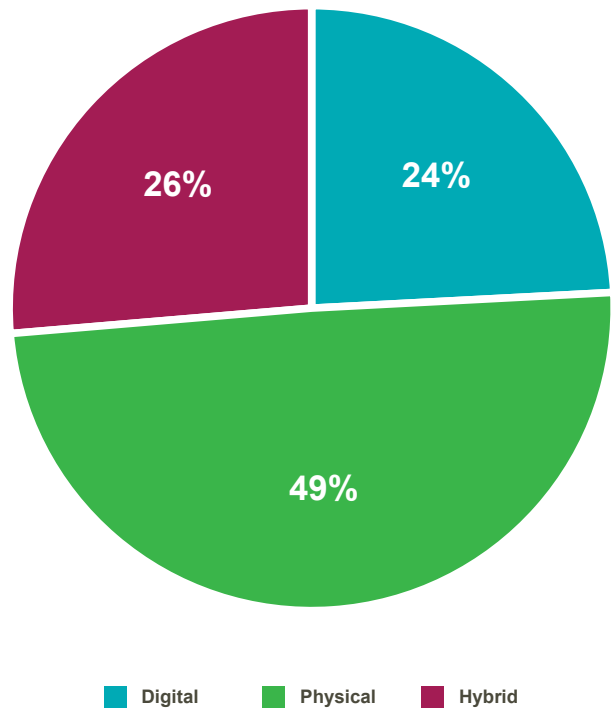
Global

Digitisation: implementation in Brazil and globally

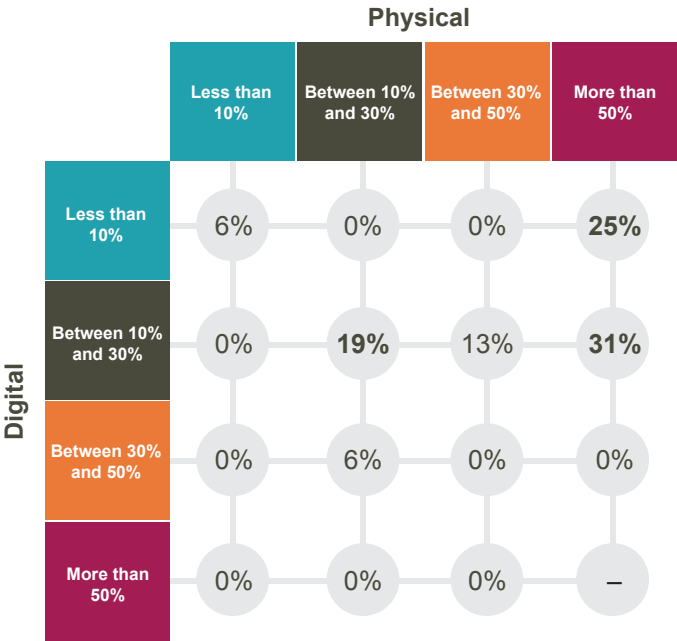


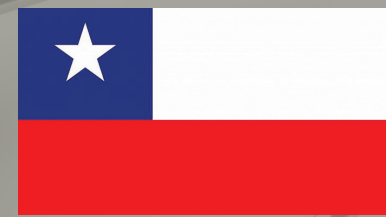


Number of fairs projected in 2021

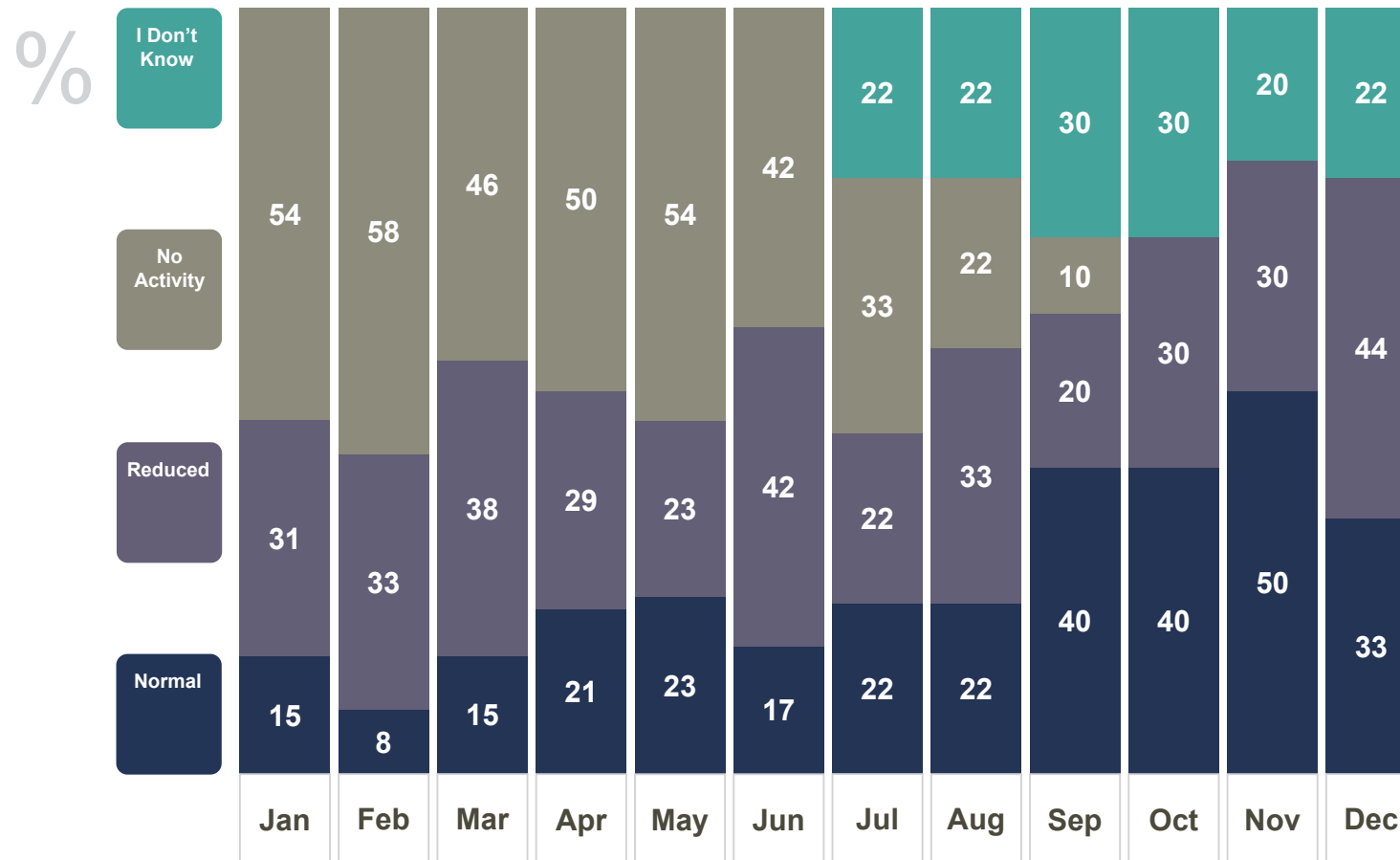


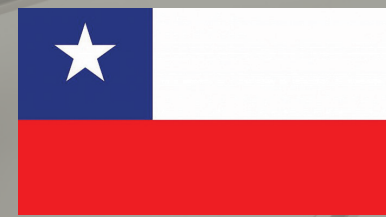
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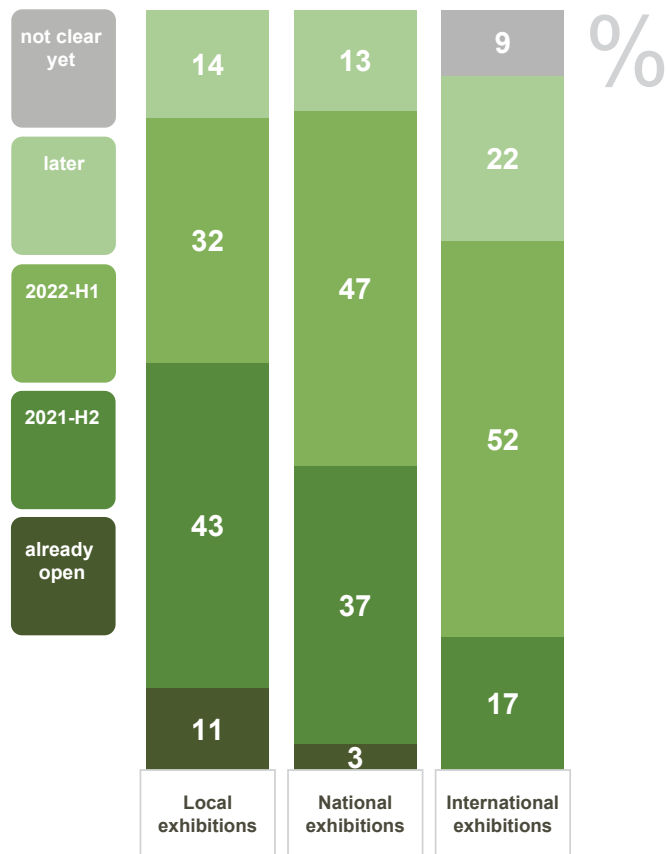


Situation of industry operations in 2021

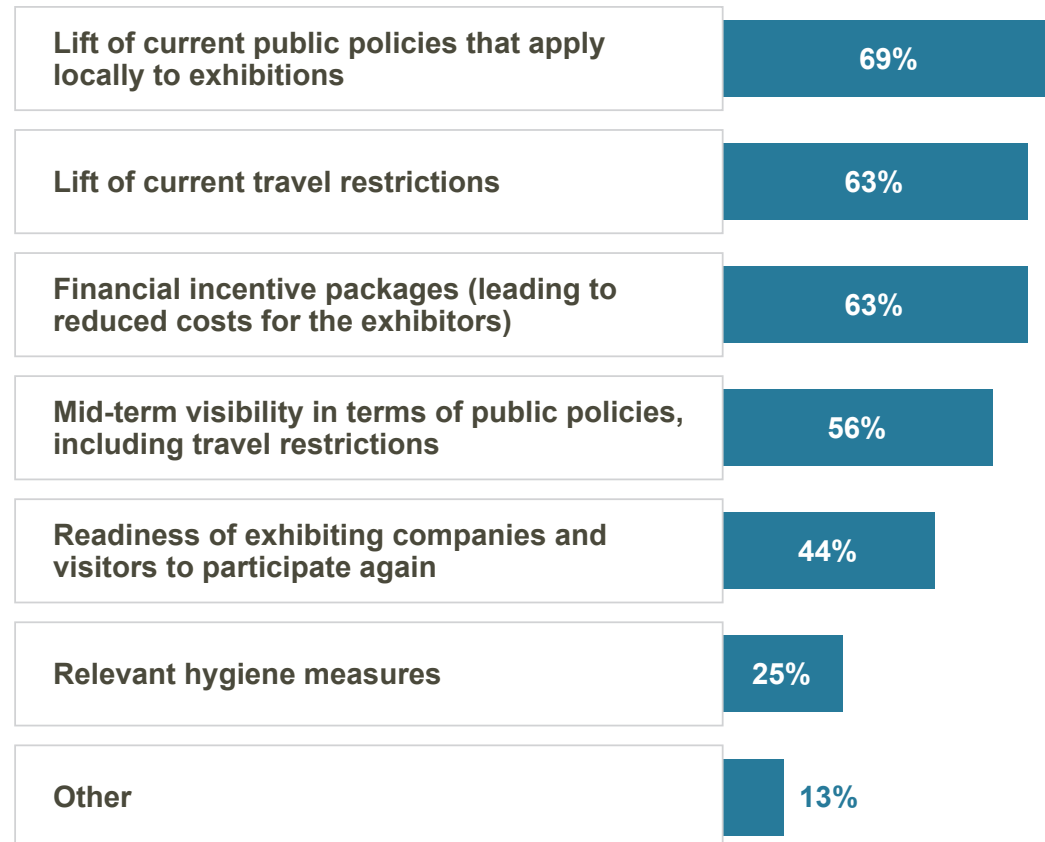


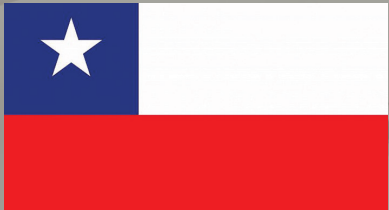


When do you believe exhibitions will open again in your city?

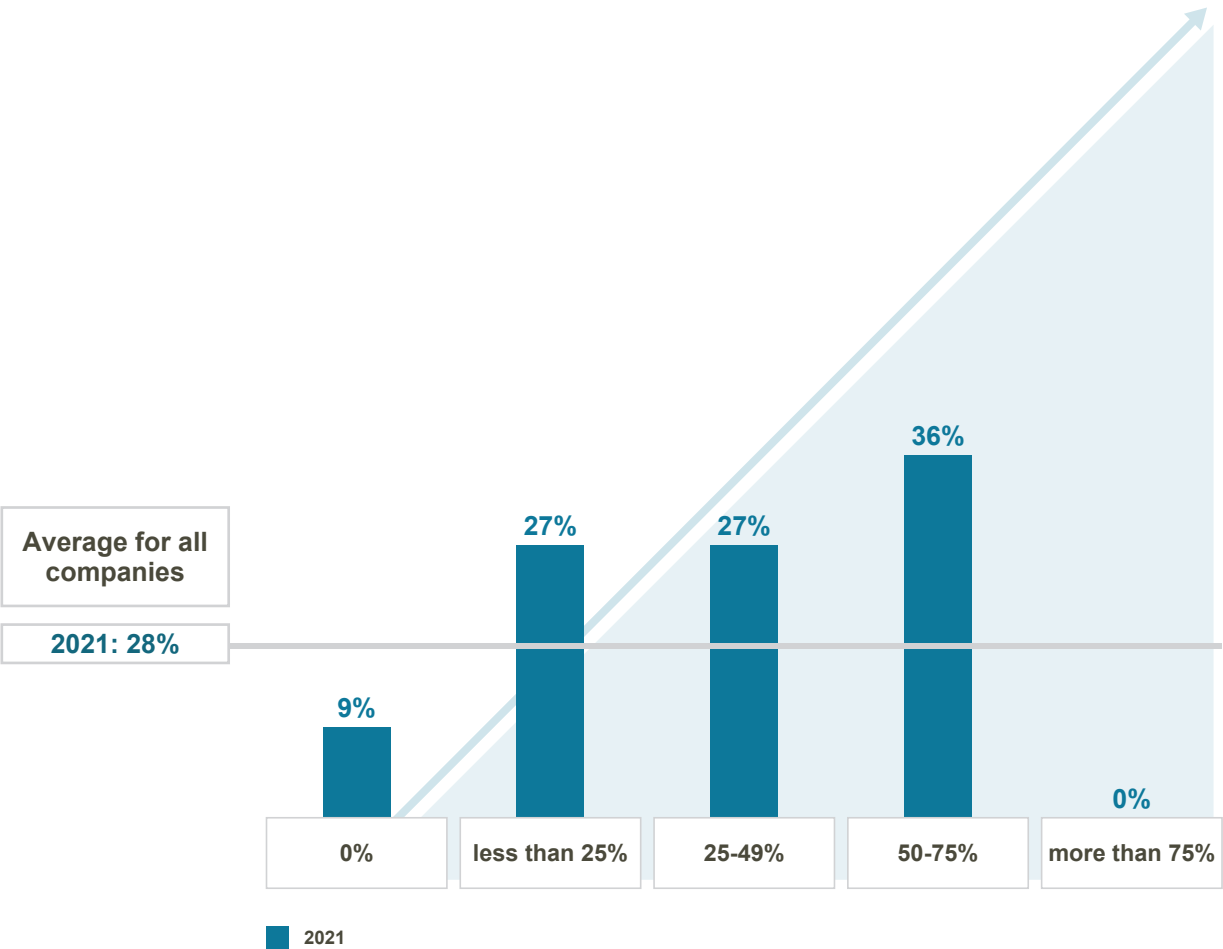


What do you believe would most help the “bounce back” of exhibitions?

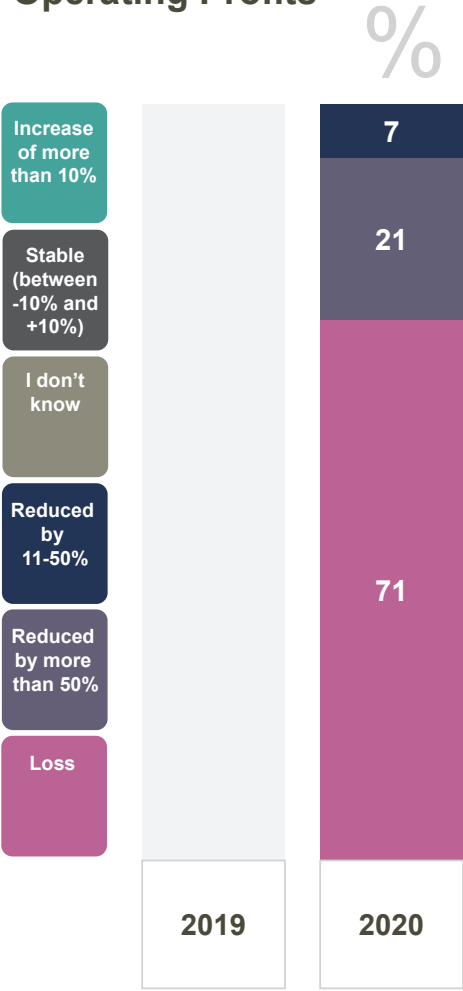




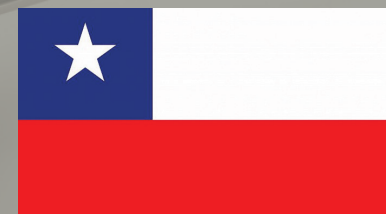
Revenue compared to 2019



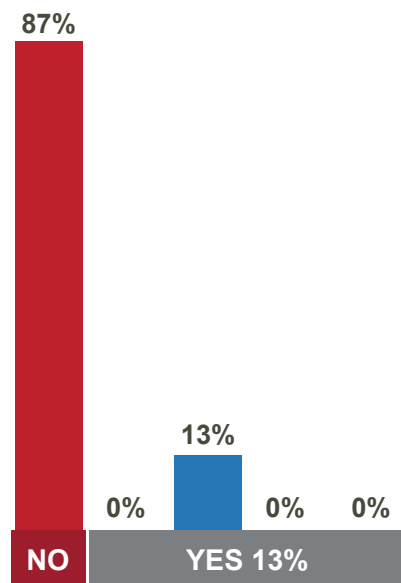
Operating Profits



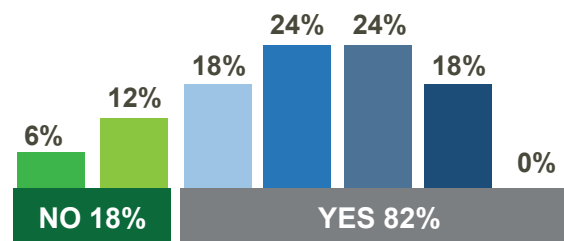
Detailed results for Chile



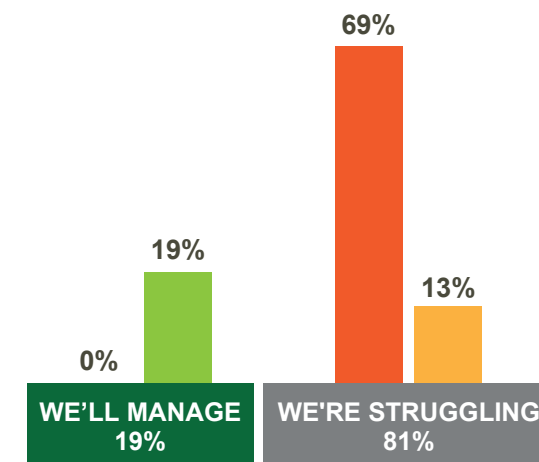
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?

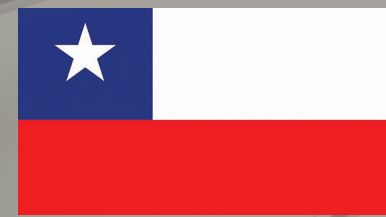


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

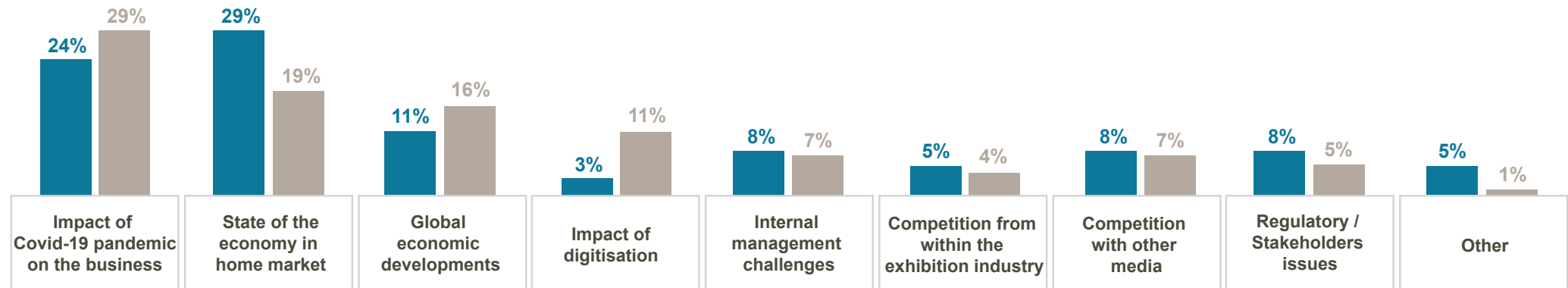
Detailed results for Chile



Most important business issues in the exhibition industry

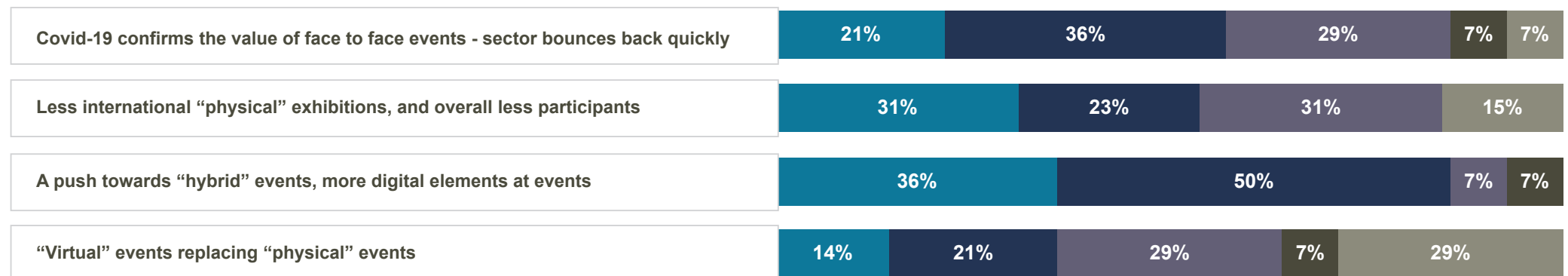
Chile

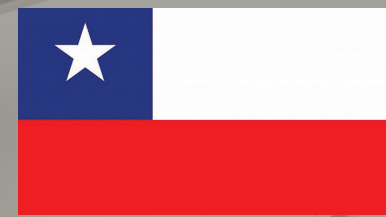
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

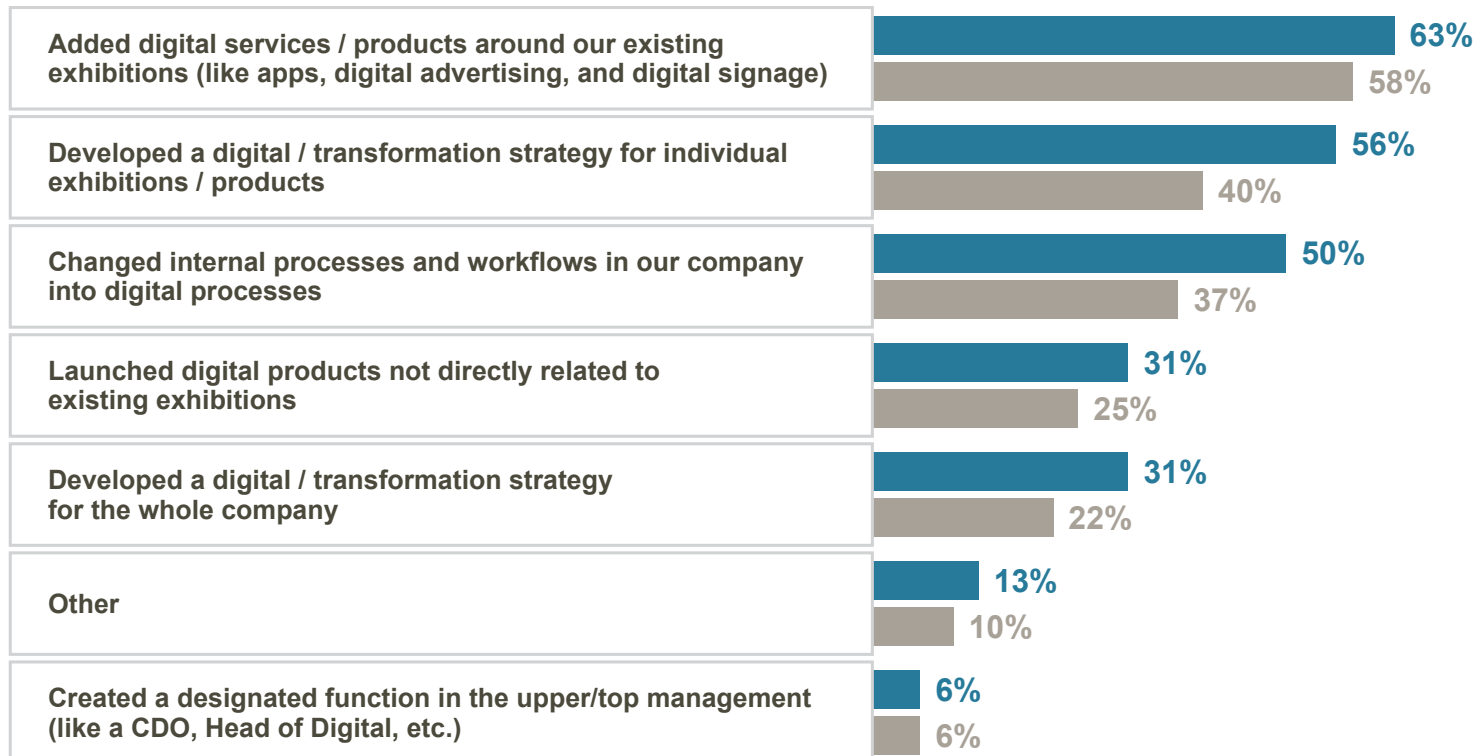


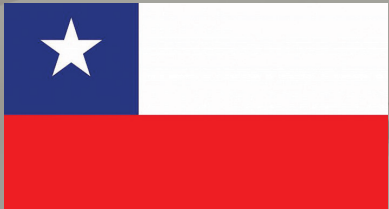


Chile

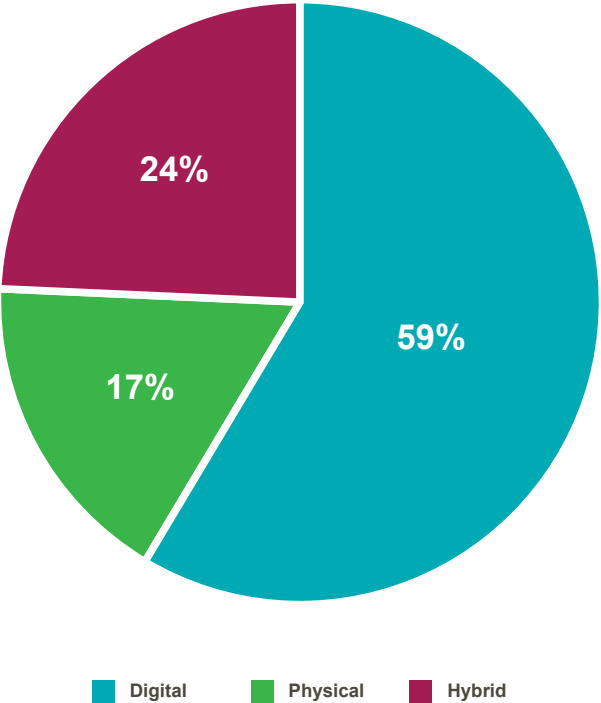
Global

Digitisation: implementation in Chile and globally

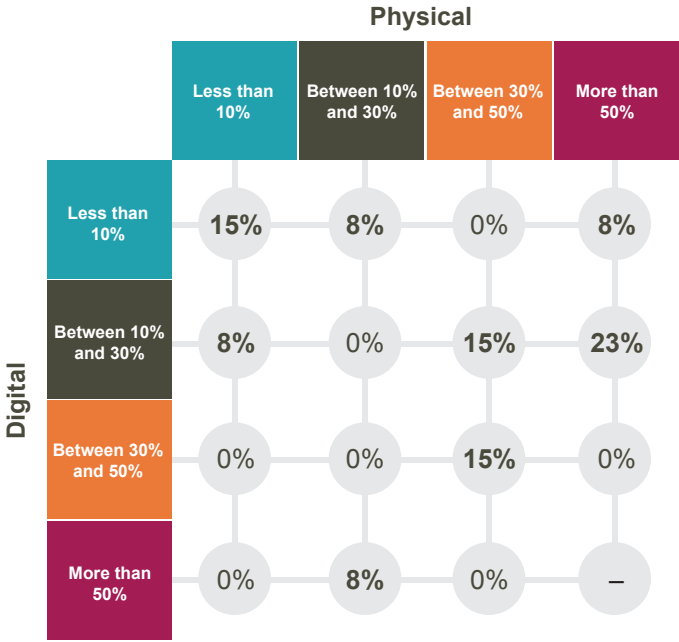




Number of fairs projected in 2021

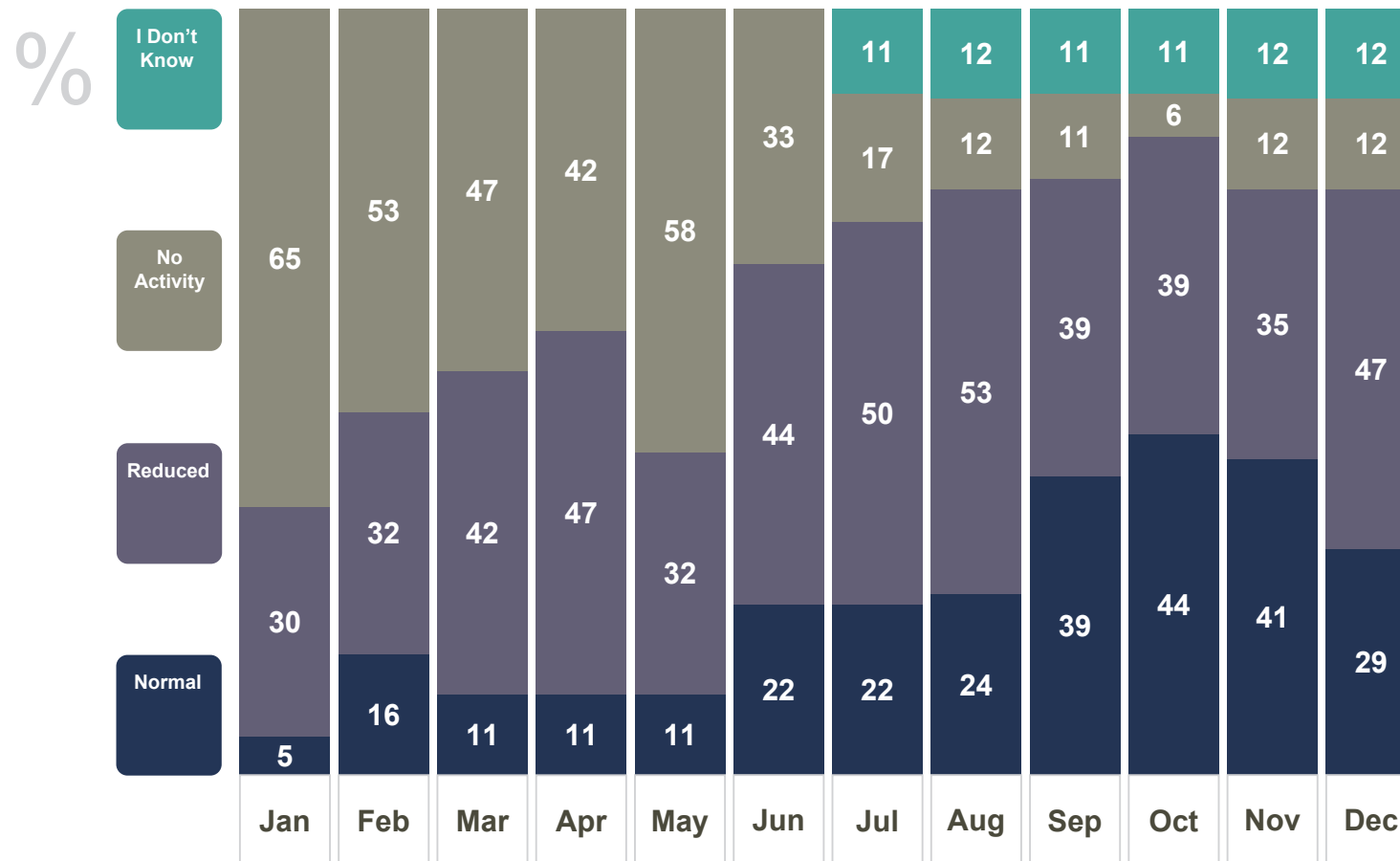


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



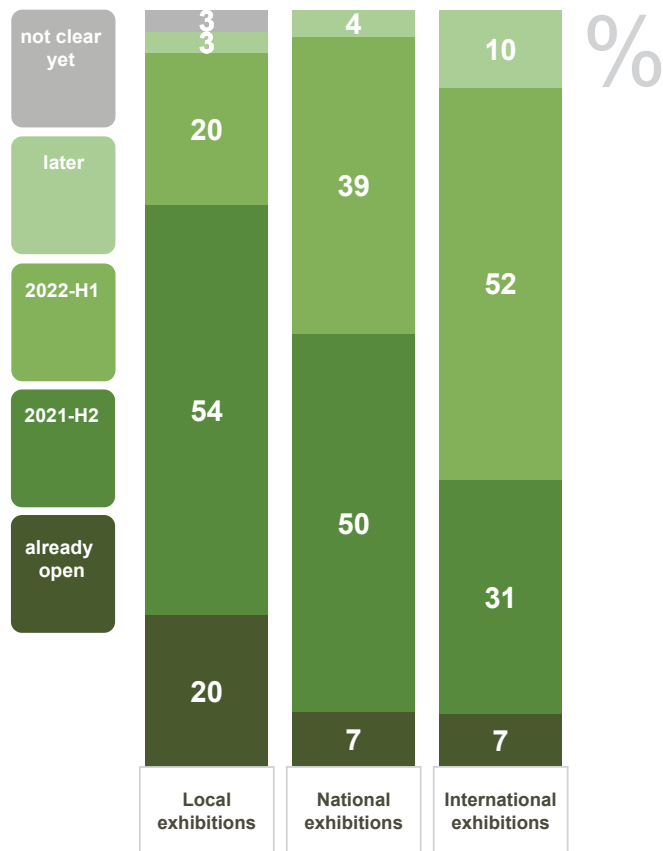


Situation of industry operations in 2021

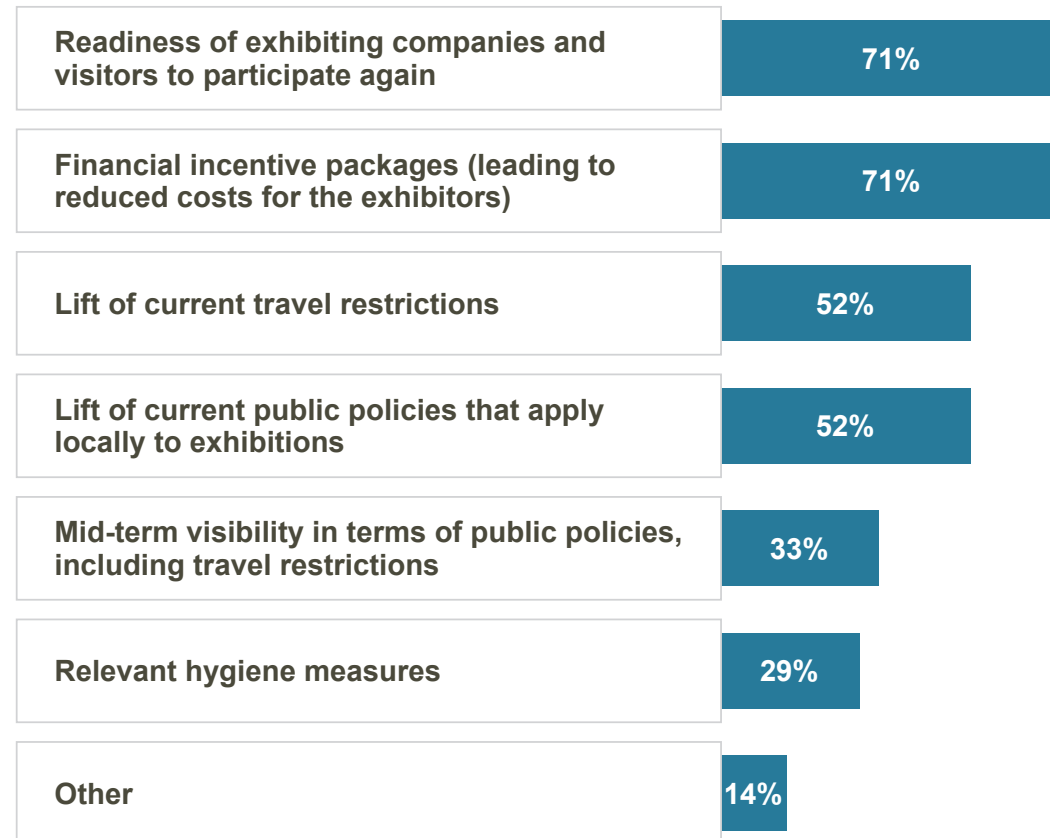




When do you believe exhibitions will open again in your city?



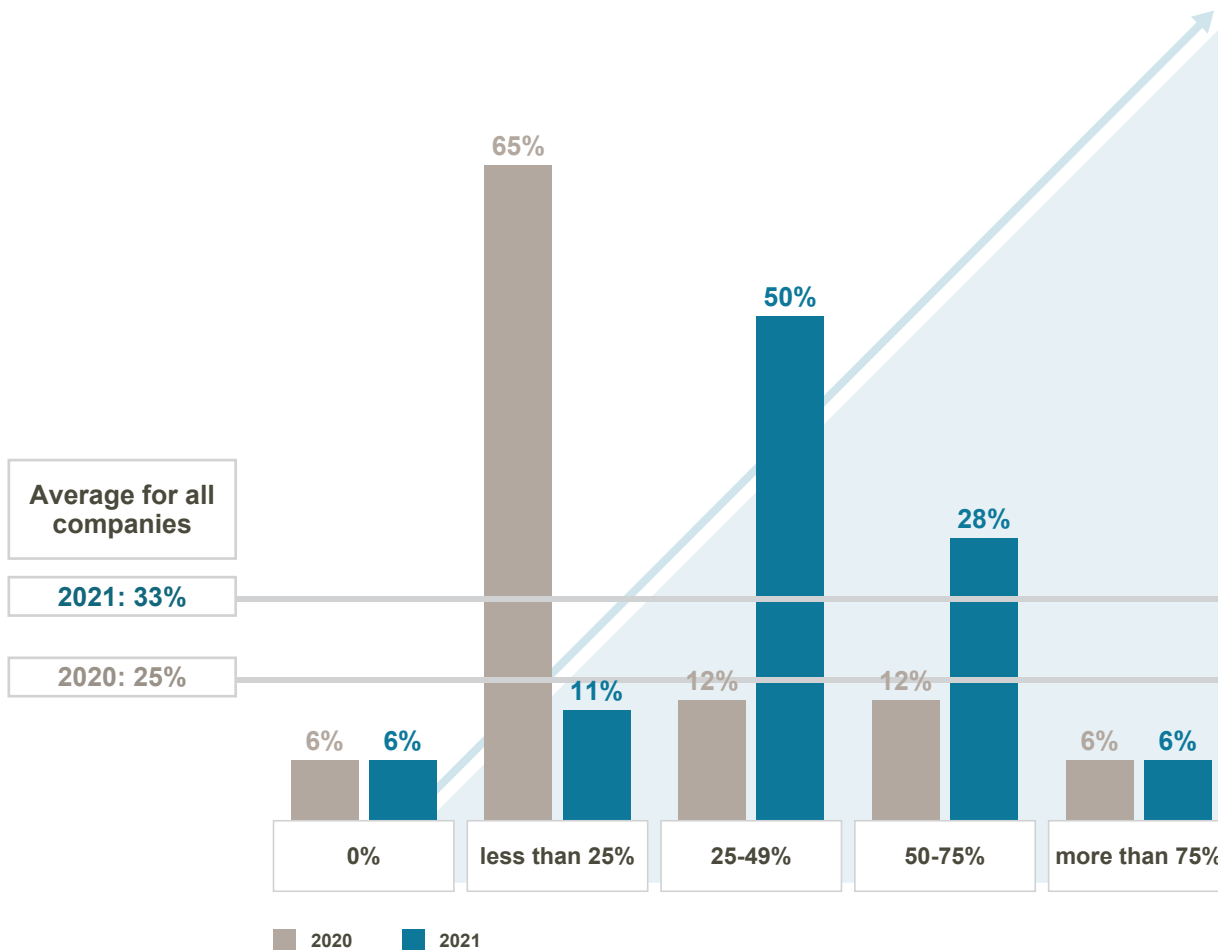
What do you believe would most help the “bounce back” of exhibitions?



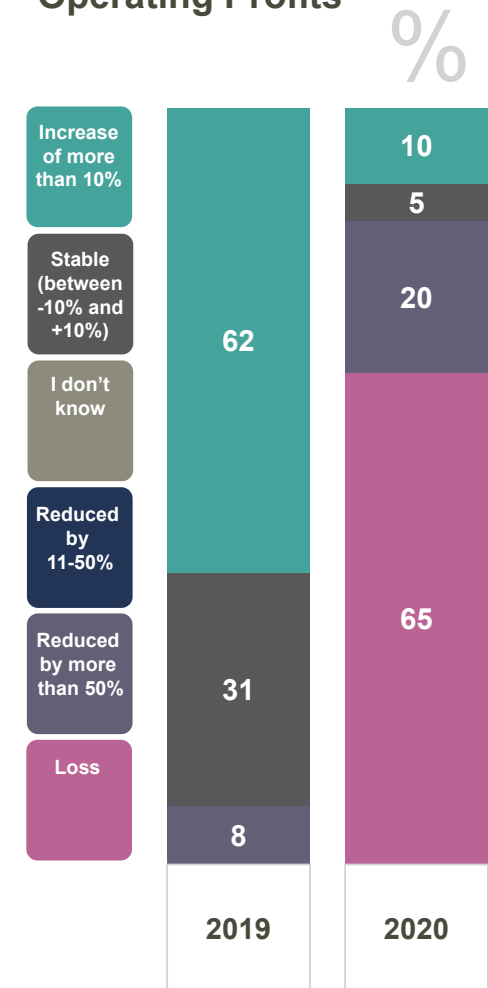
Detailed results for Colombia



Revenue compared to 2019



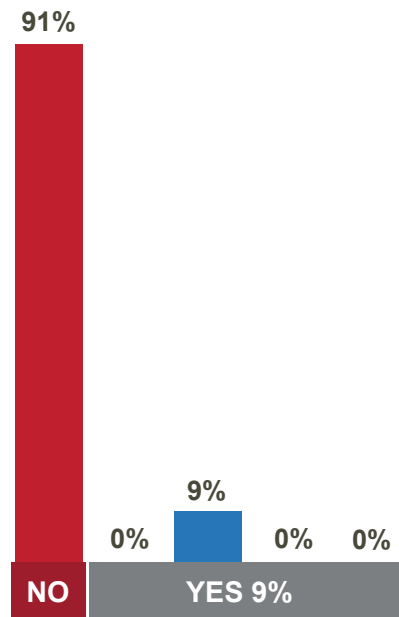
Operating Profits



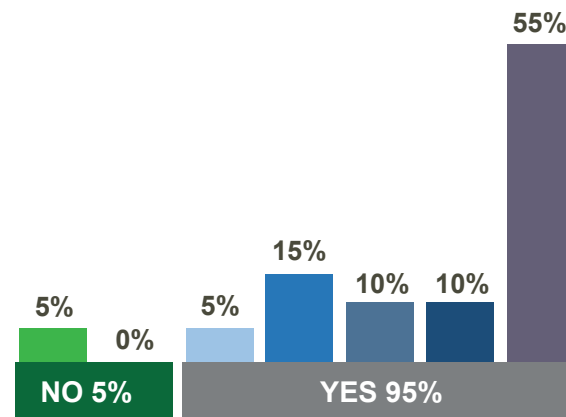
Detailed results for Colombia



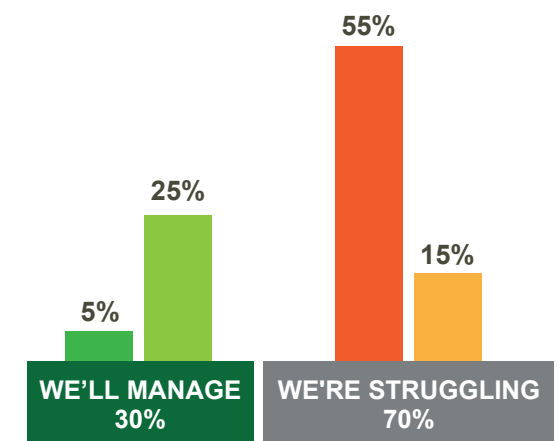
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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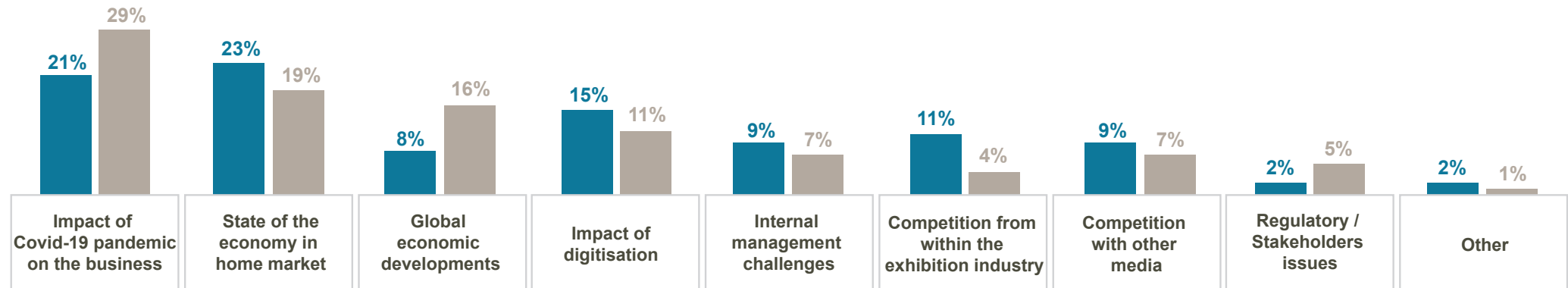
Detailed results for Colombia



Most important business issues in the exhibition industry

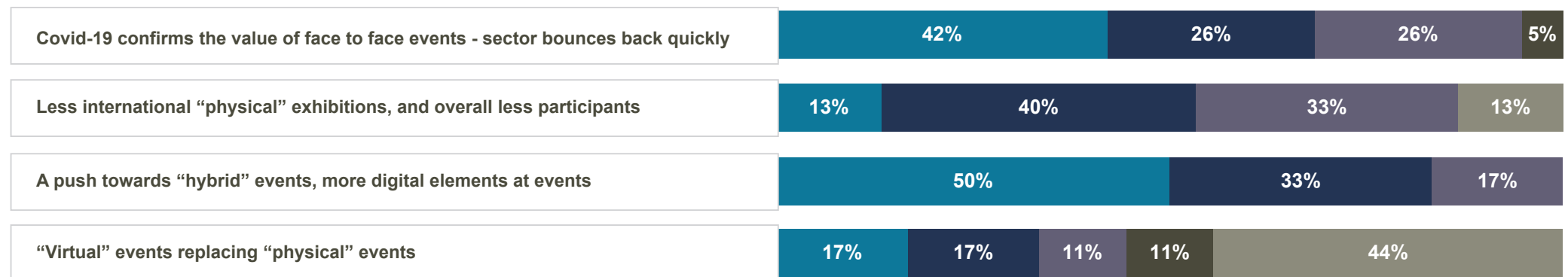
Colombia

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

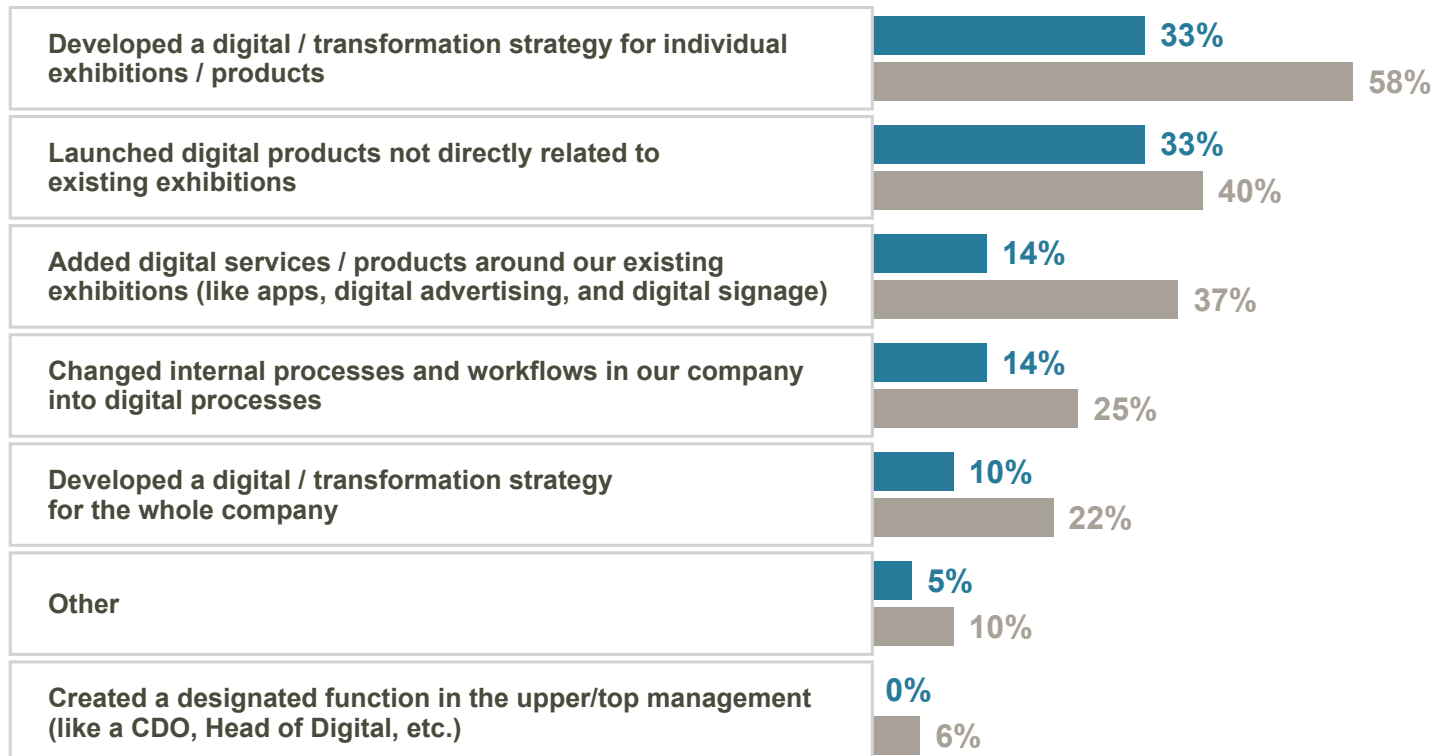




Colombia

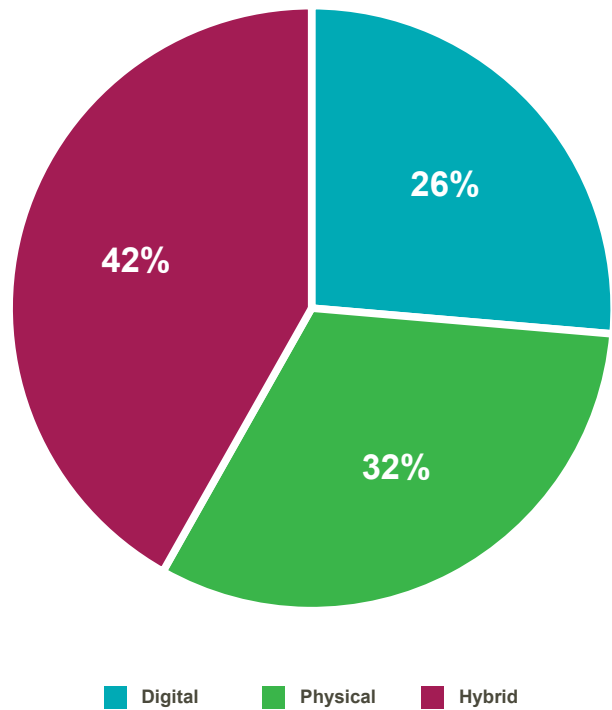
Global

Digitisation: implementation in Colombia and globally

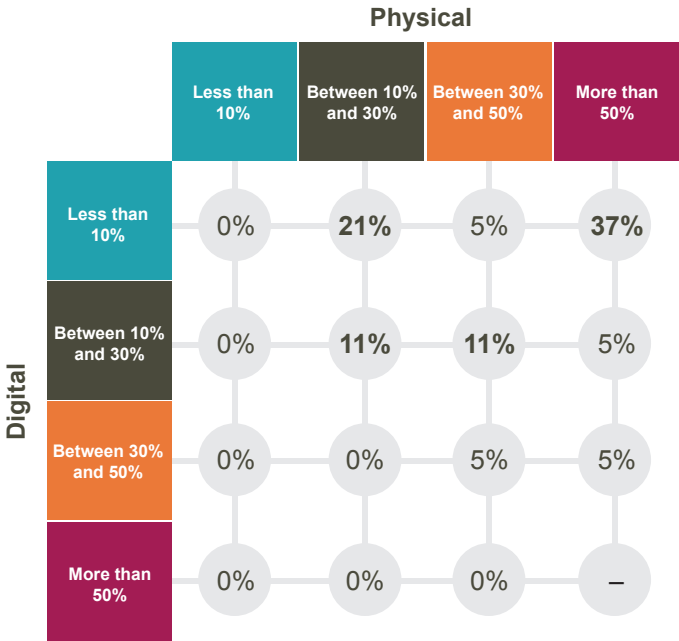




Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



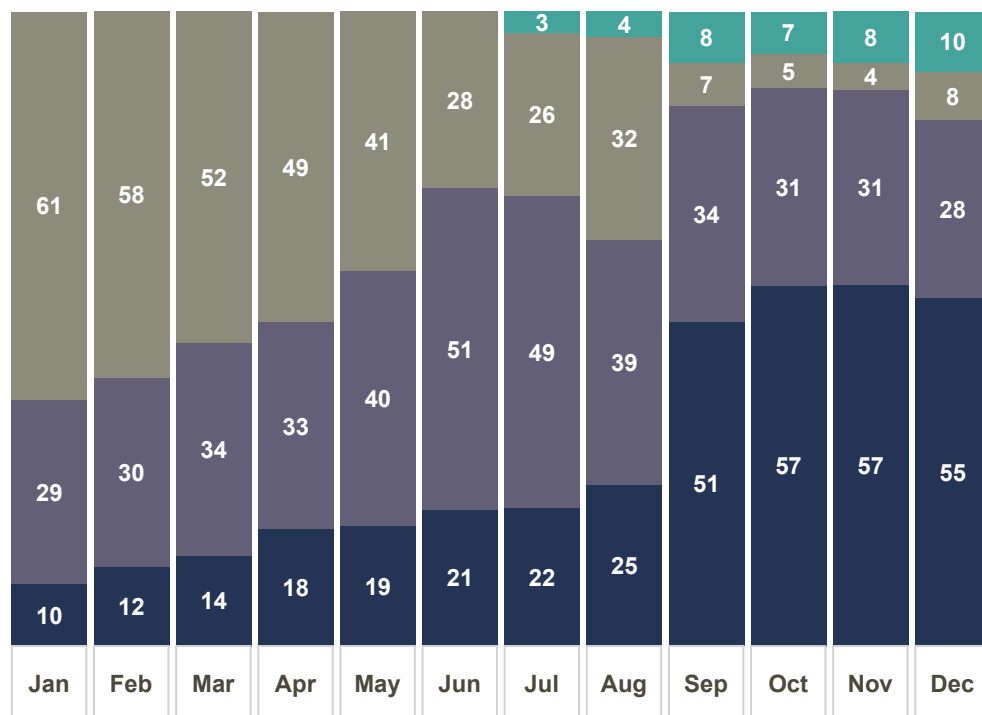


Europe

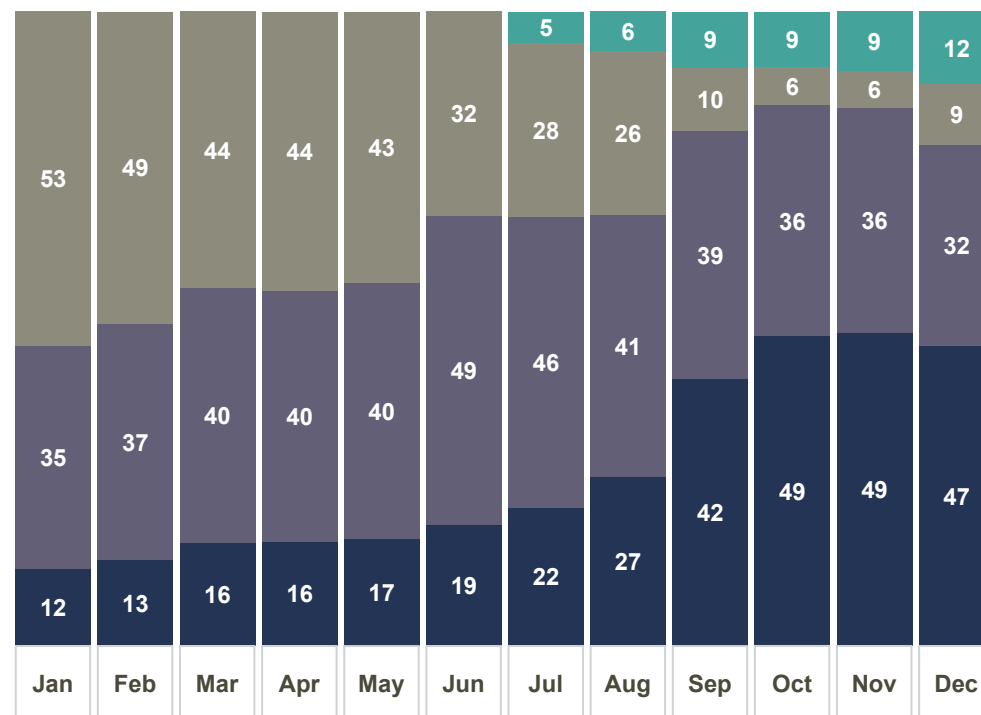
Situation of industry operations in 2021

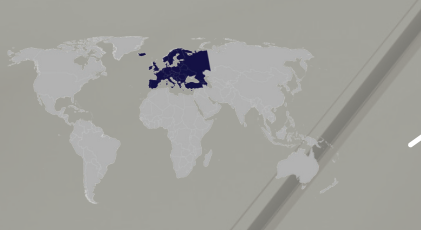


Europe

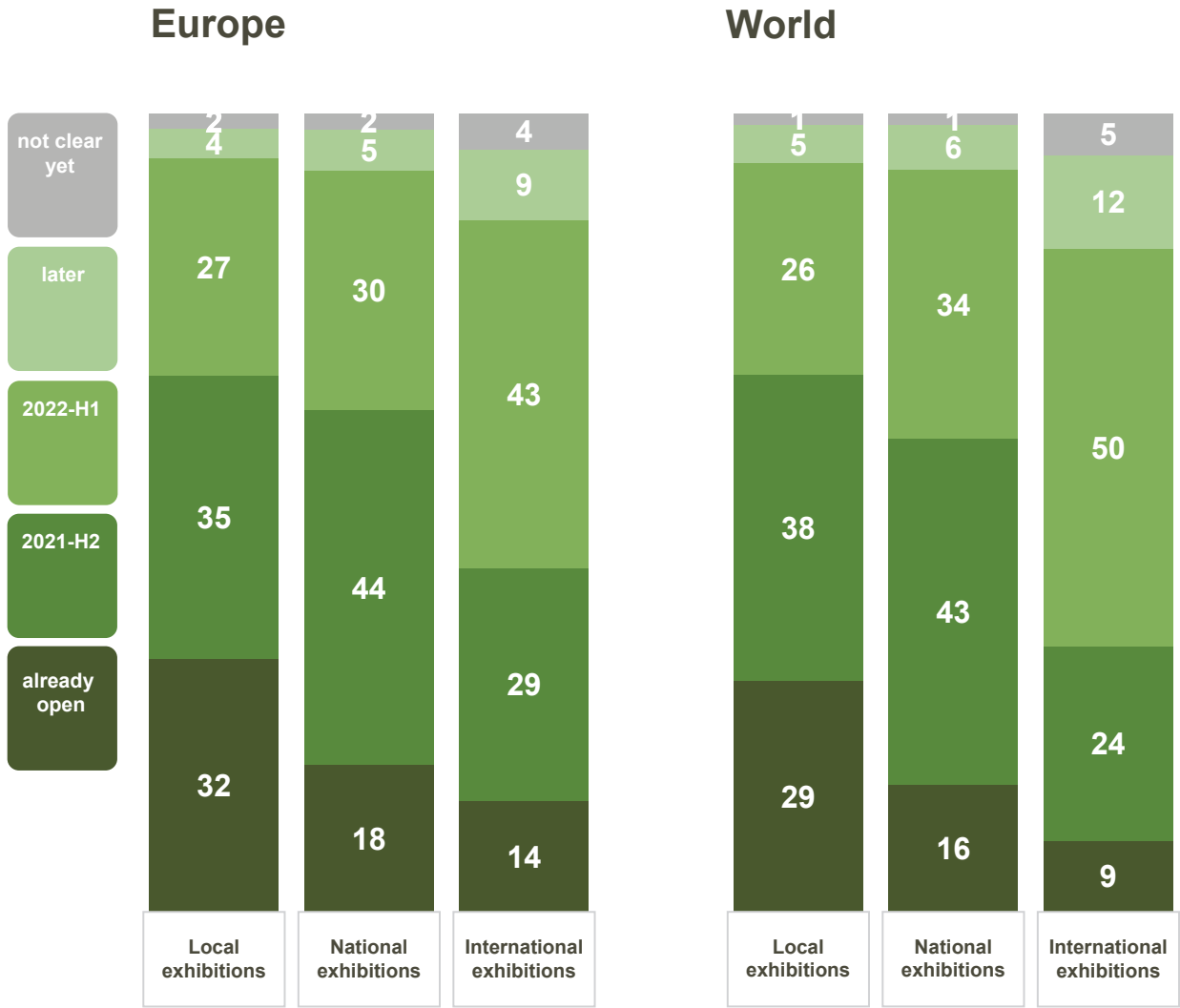


World



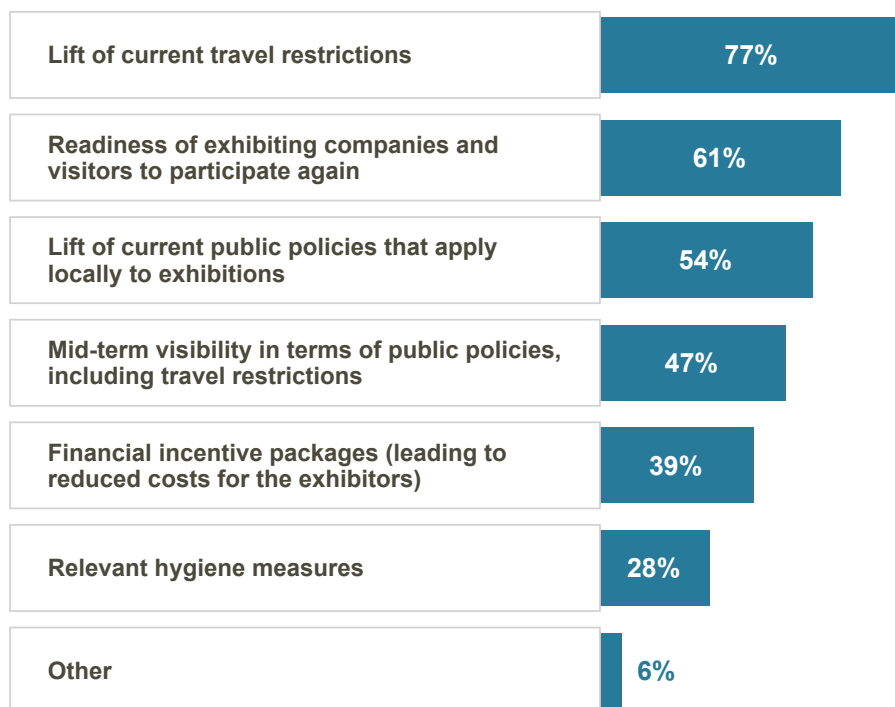


When do you believe exhibitions will open again in your city?

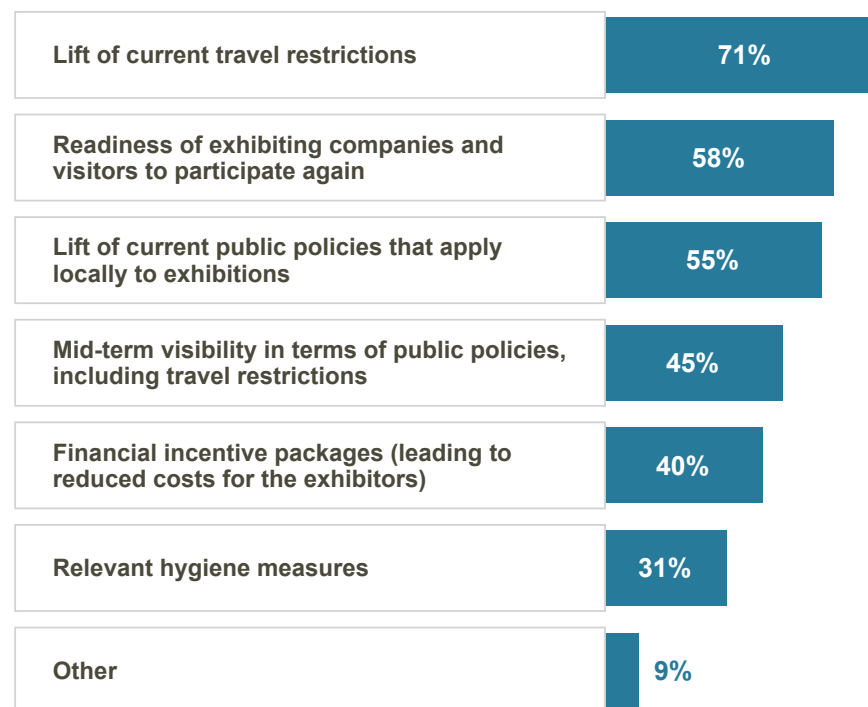


What do you believe would most help the “bounce back” of exhibitions?

Europe

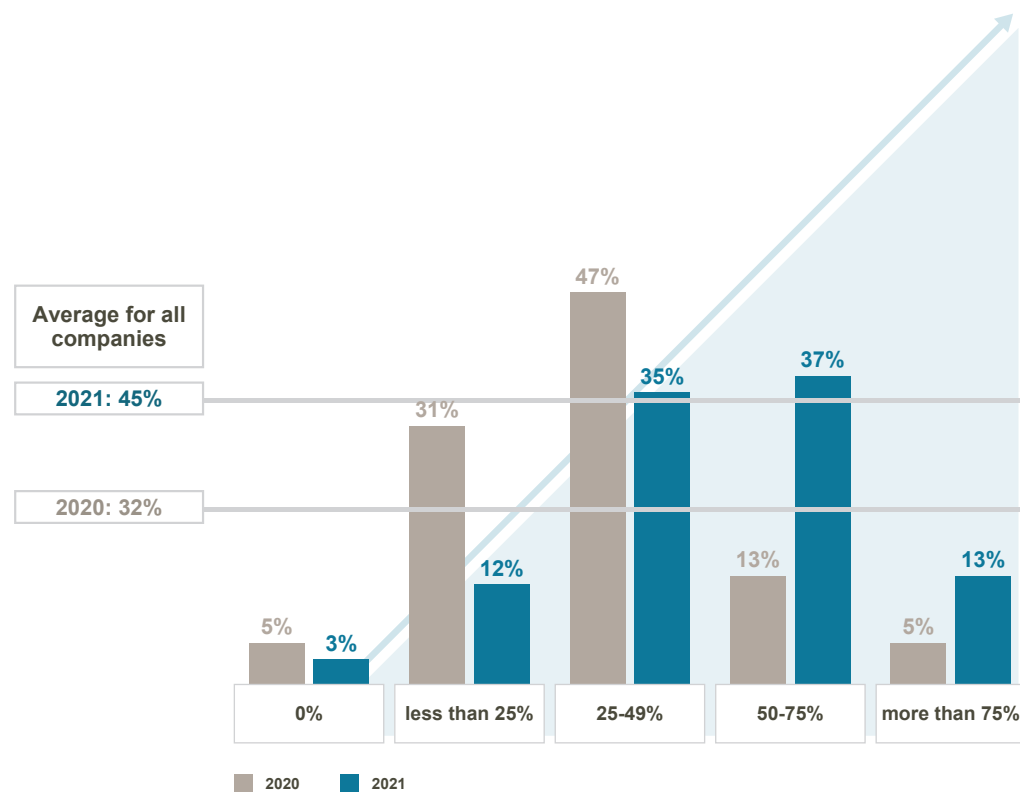


World

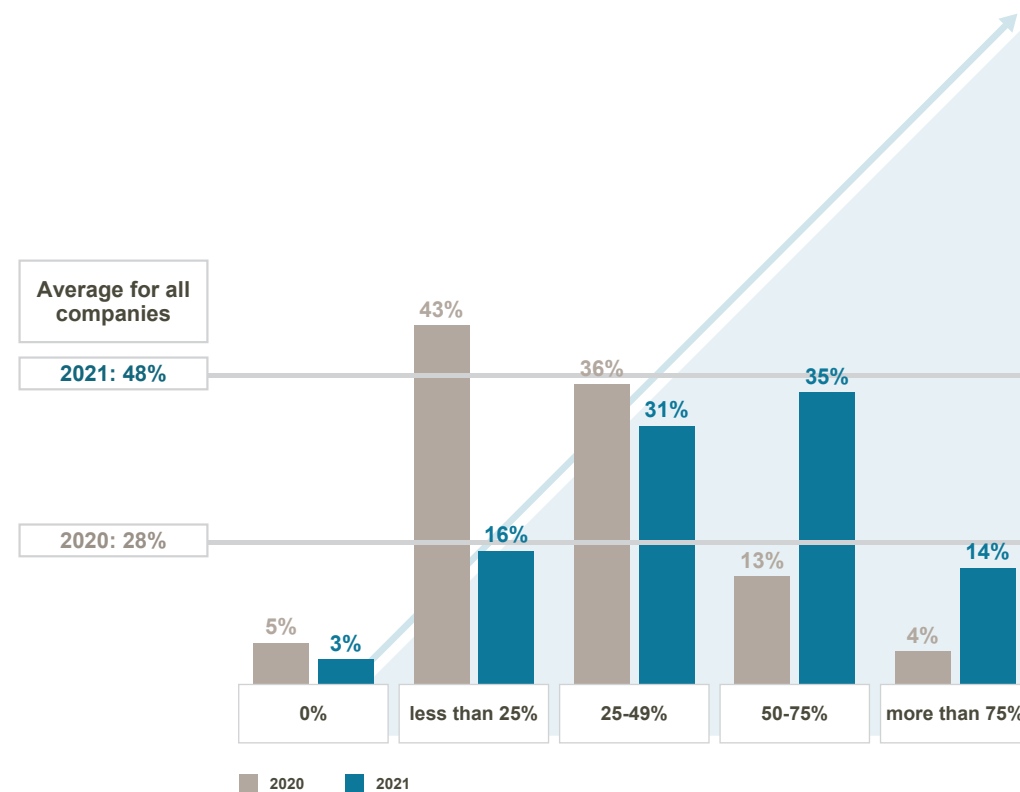


Revenue compared to 2019

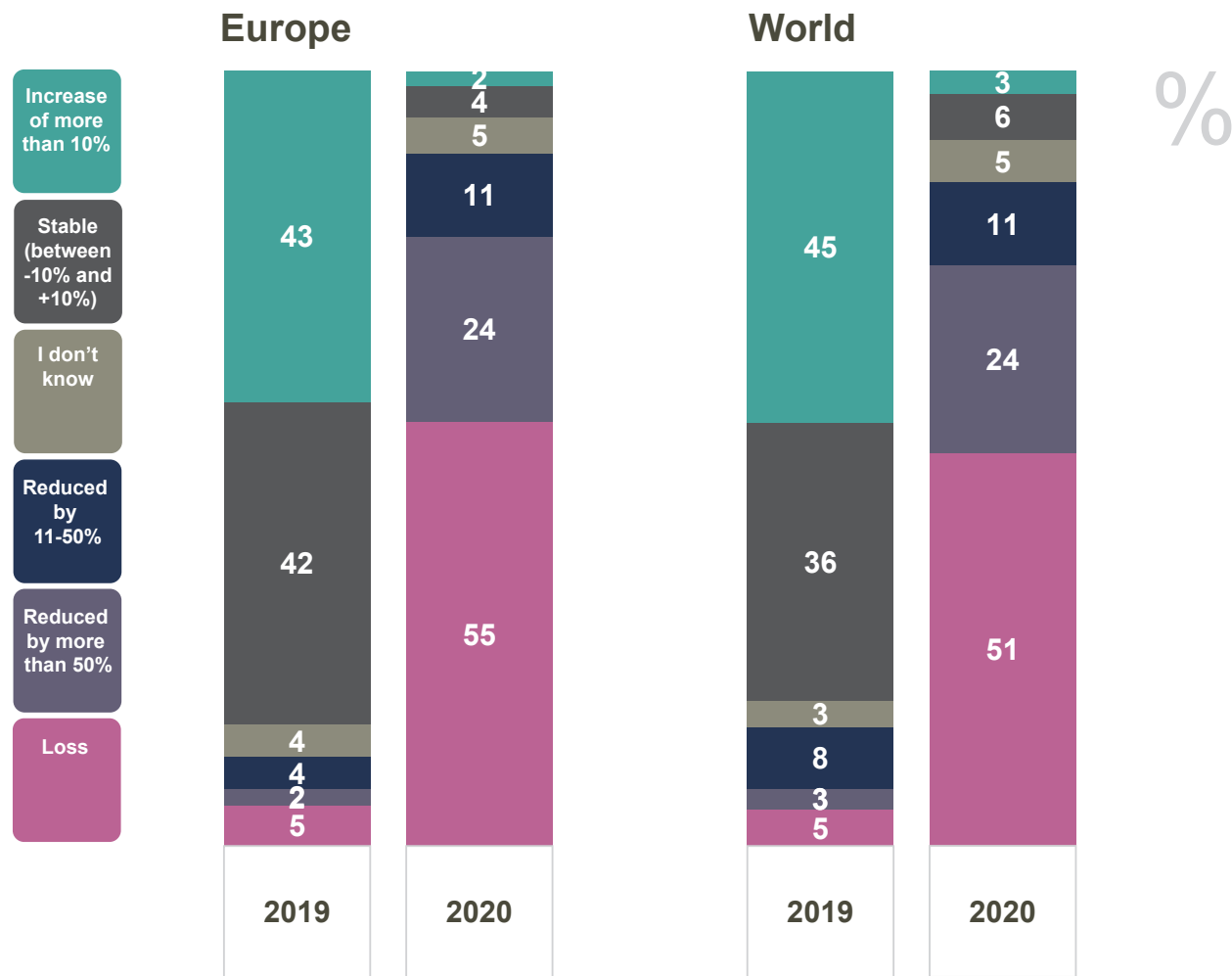
Europe



World



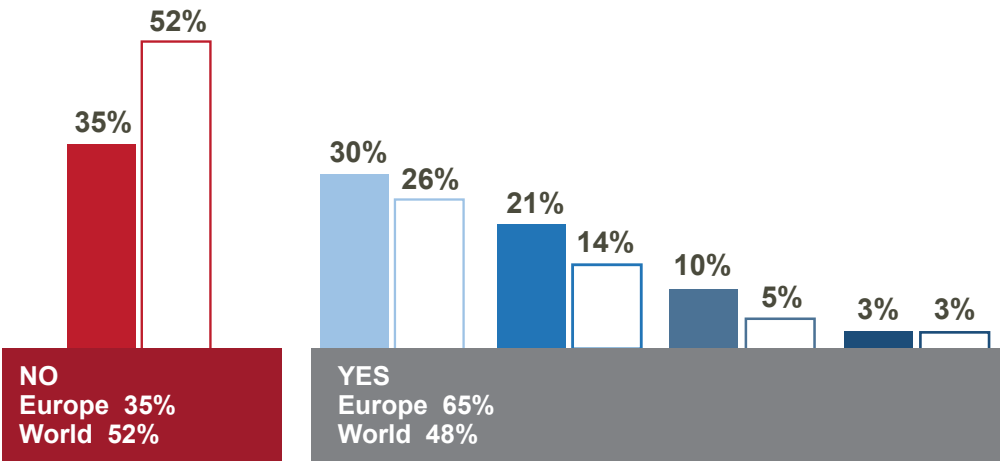
Operating profits Europe



Did your company benefit from public financial support?

Europe World

- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

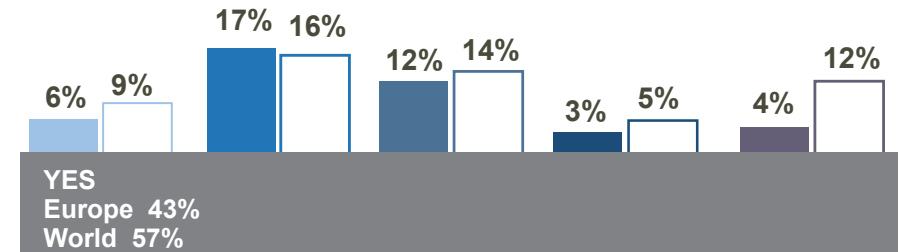
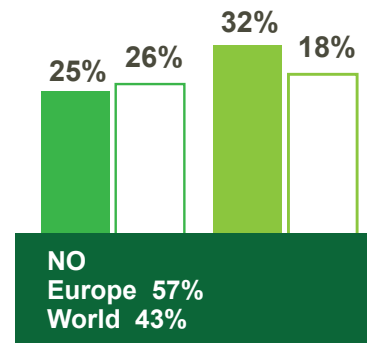


Have you had to reduce your workforce?

Europe

World

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

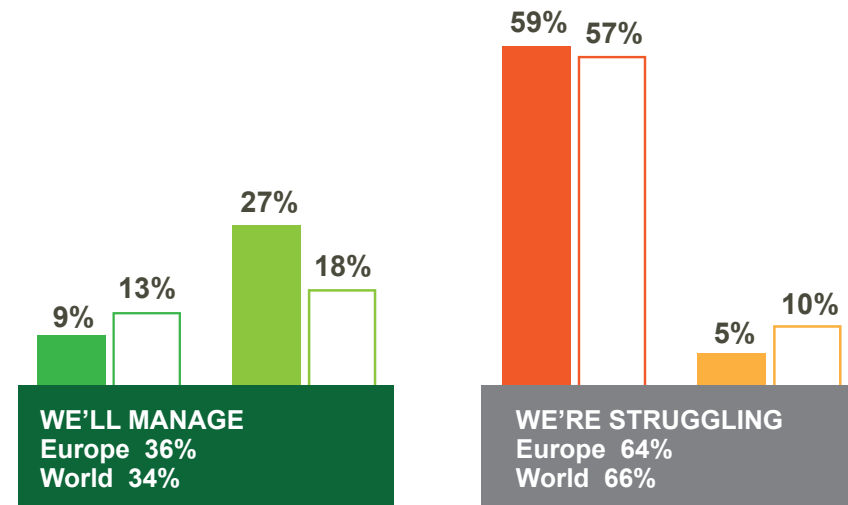


If there is no business for the next 6 months,
which best applies?

Europe

World

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
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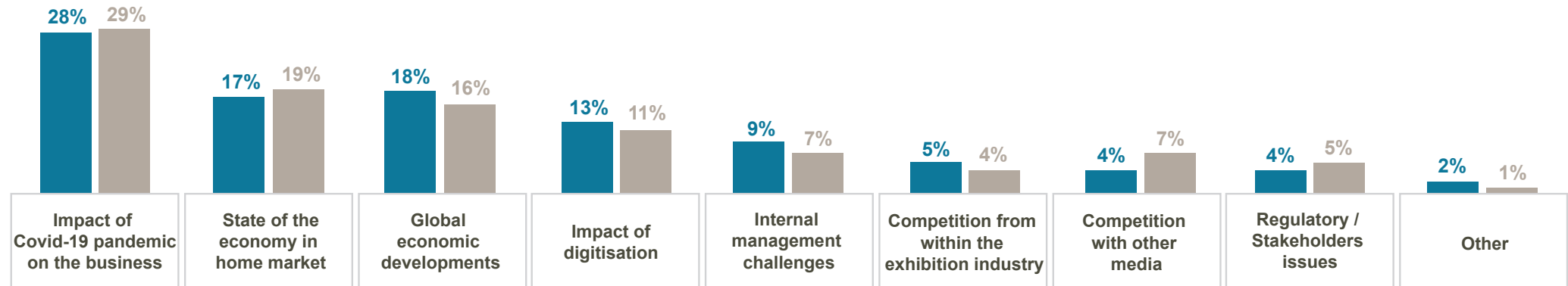


Most Important Business Issues - Format of Exhibitions - Europe

Most important business issues in the exhibition industry

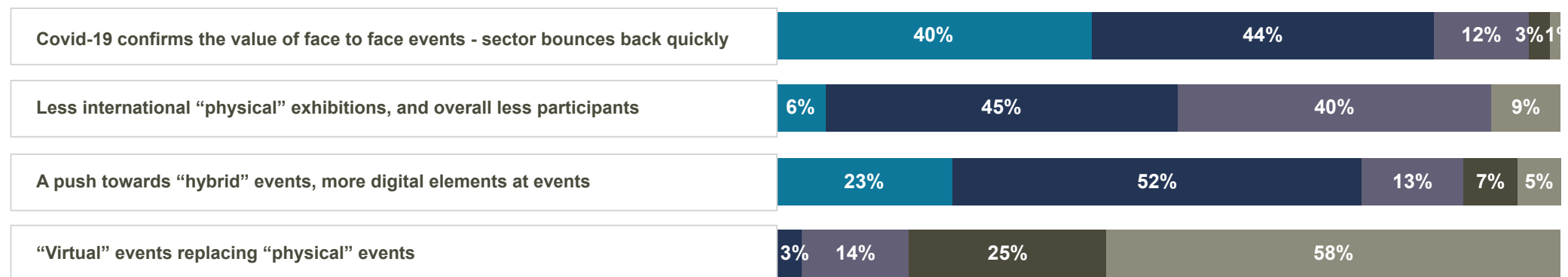
Europe

Global



Format of exhibitions in the coming years

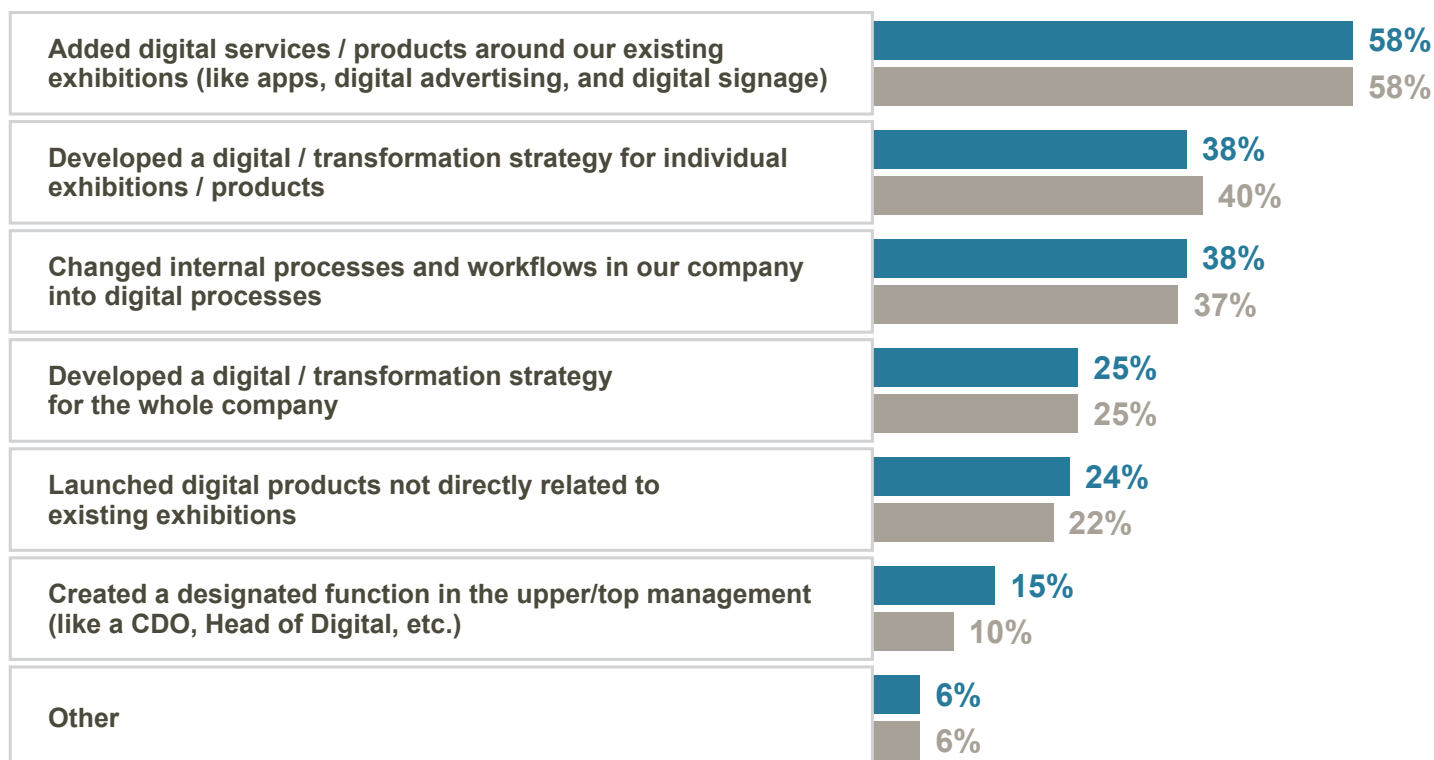
Yes, for sure Most probably Not sure Not sure at all Definitely not



Europe

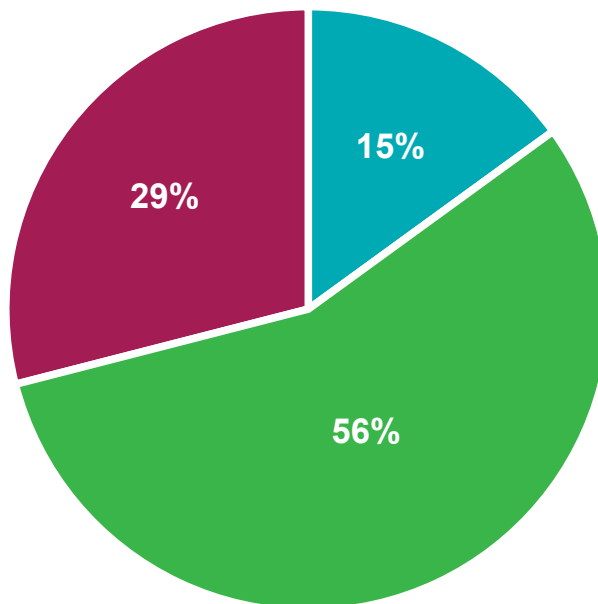
Global

Digitisation: implementation in Europe and globally



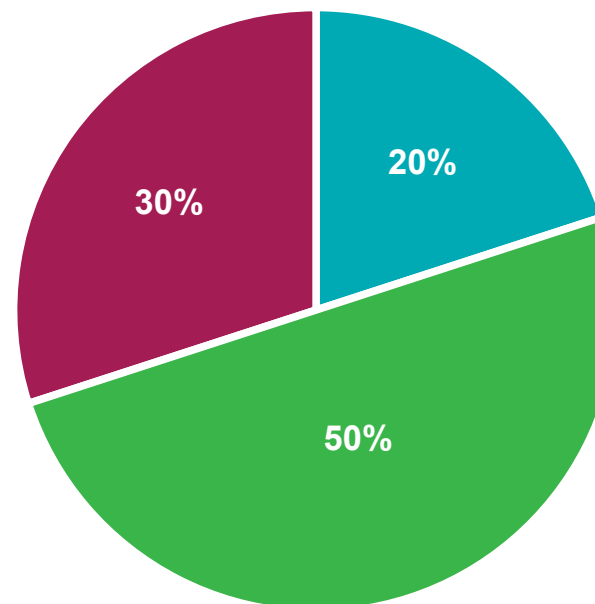
Number of fairs projected in 2021 Europe

Europe



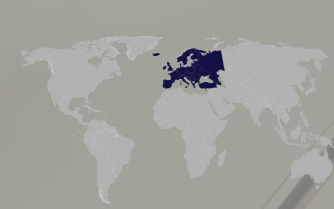
 Digital  Physical  Hybrid

World

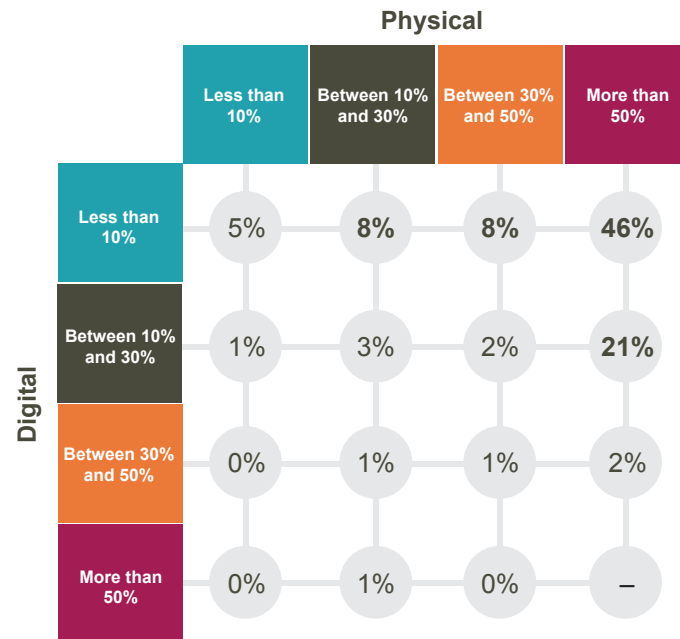


 Digital  Physical  Hybrid

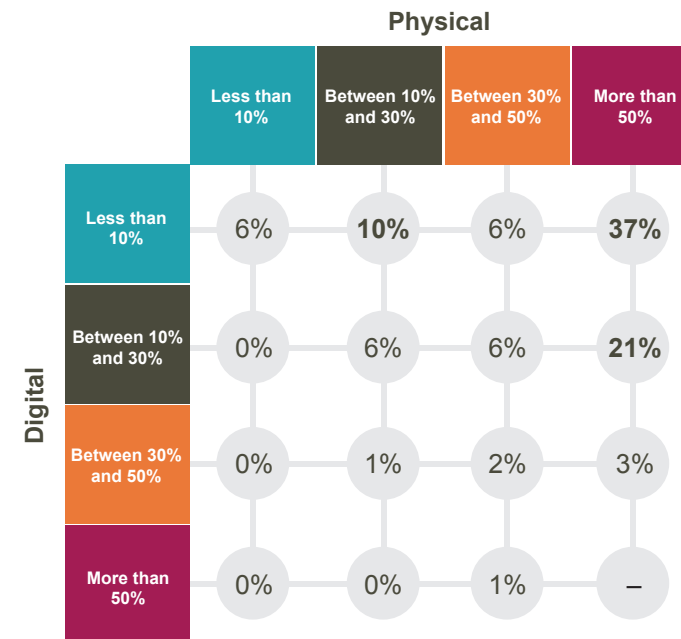
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



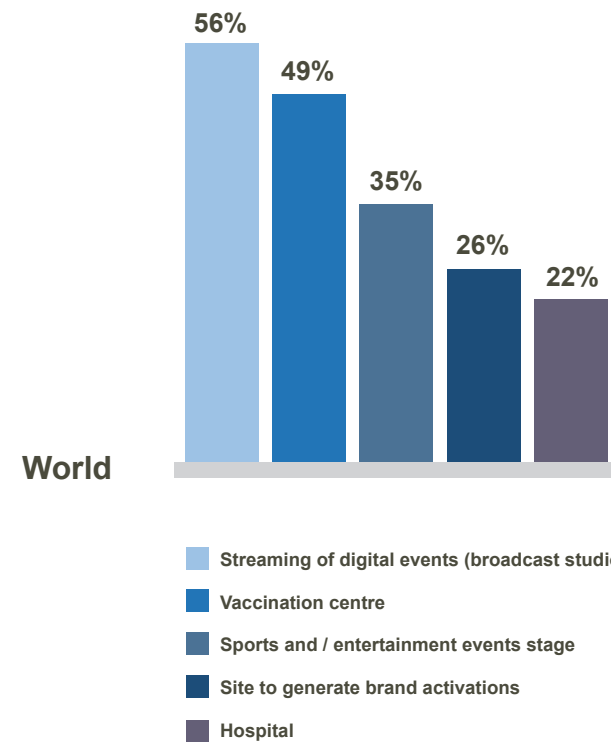
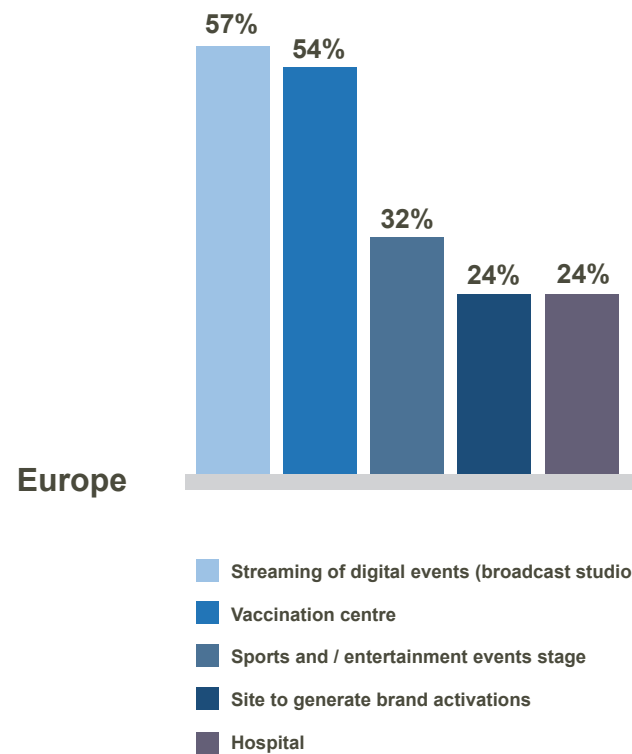
Europe

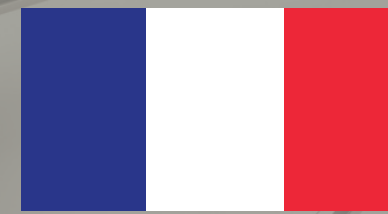


World

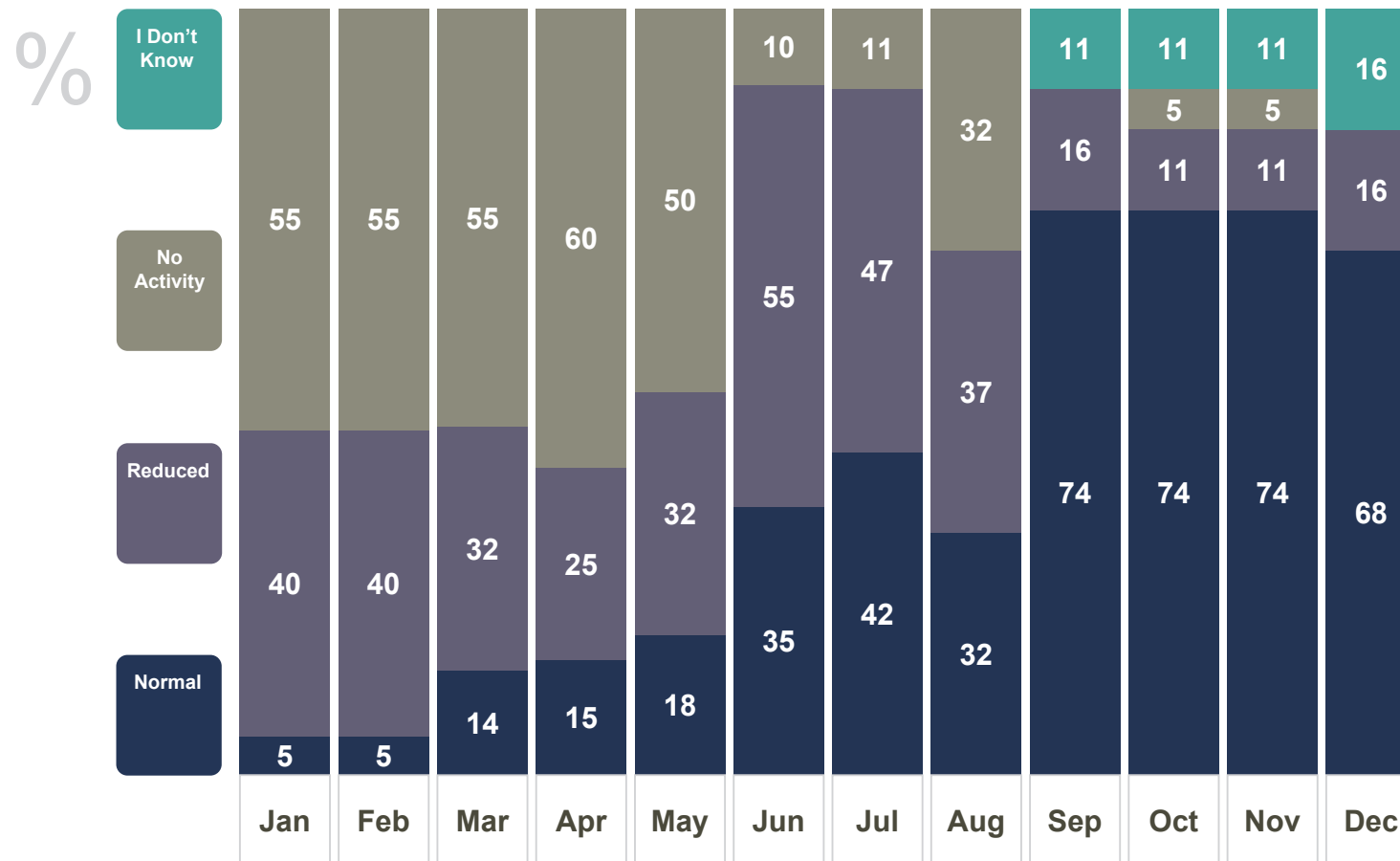


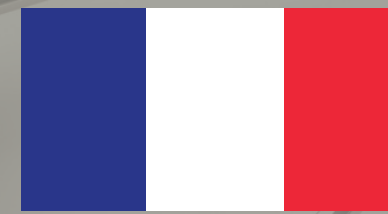
Expanded activities (for venues only) Europe



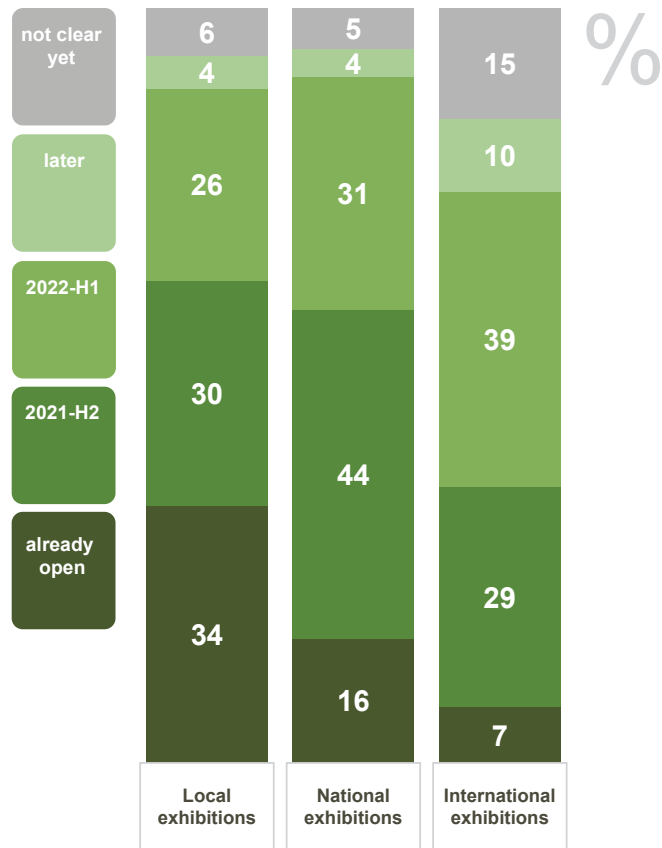


Situation of industry operations in 2021

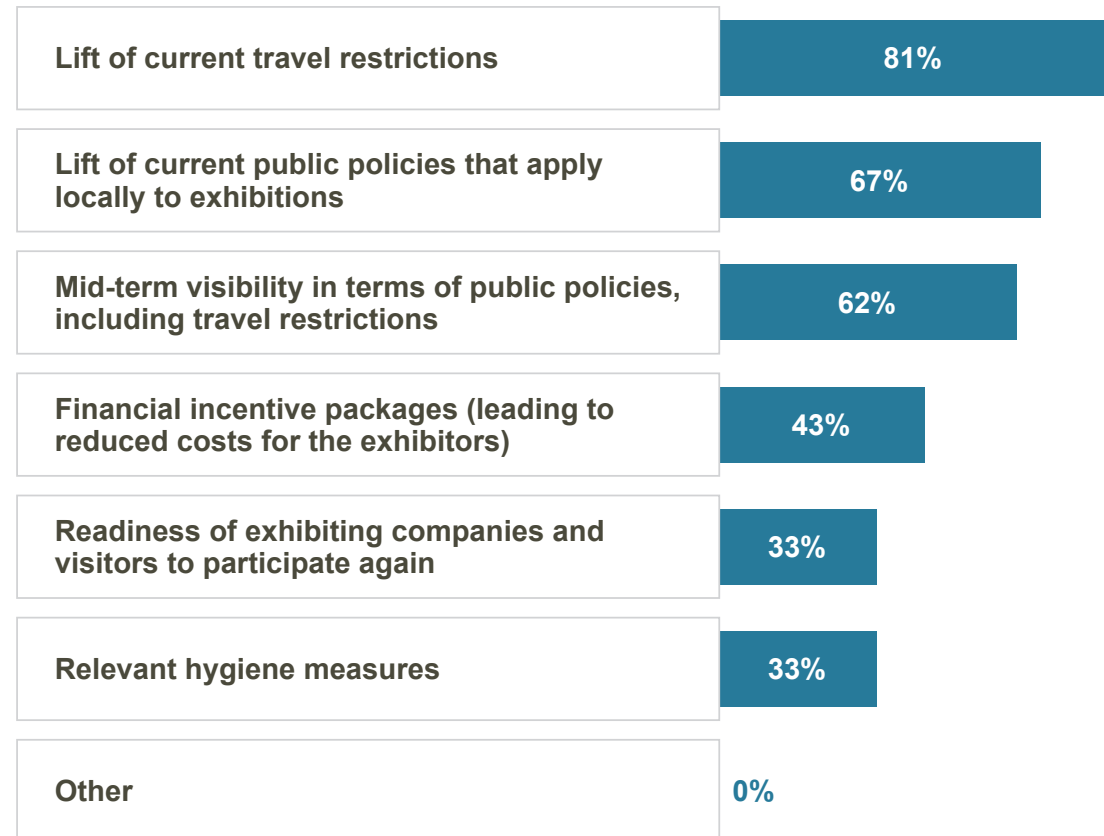




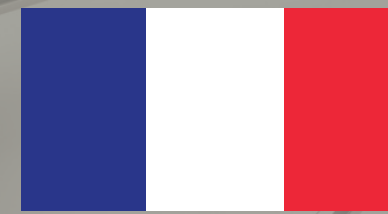
When do you believe exhibitions will open again in your city?



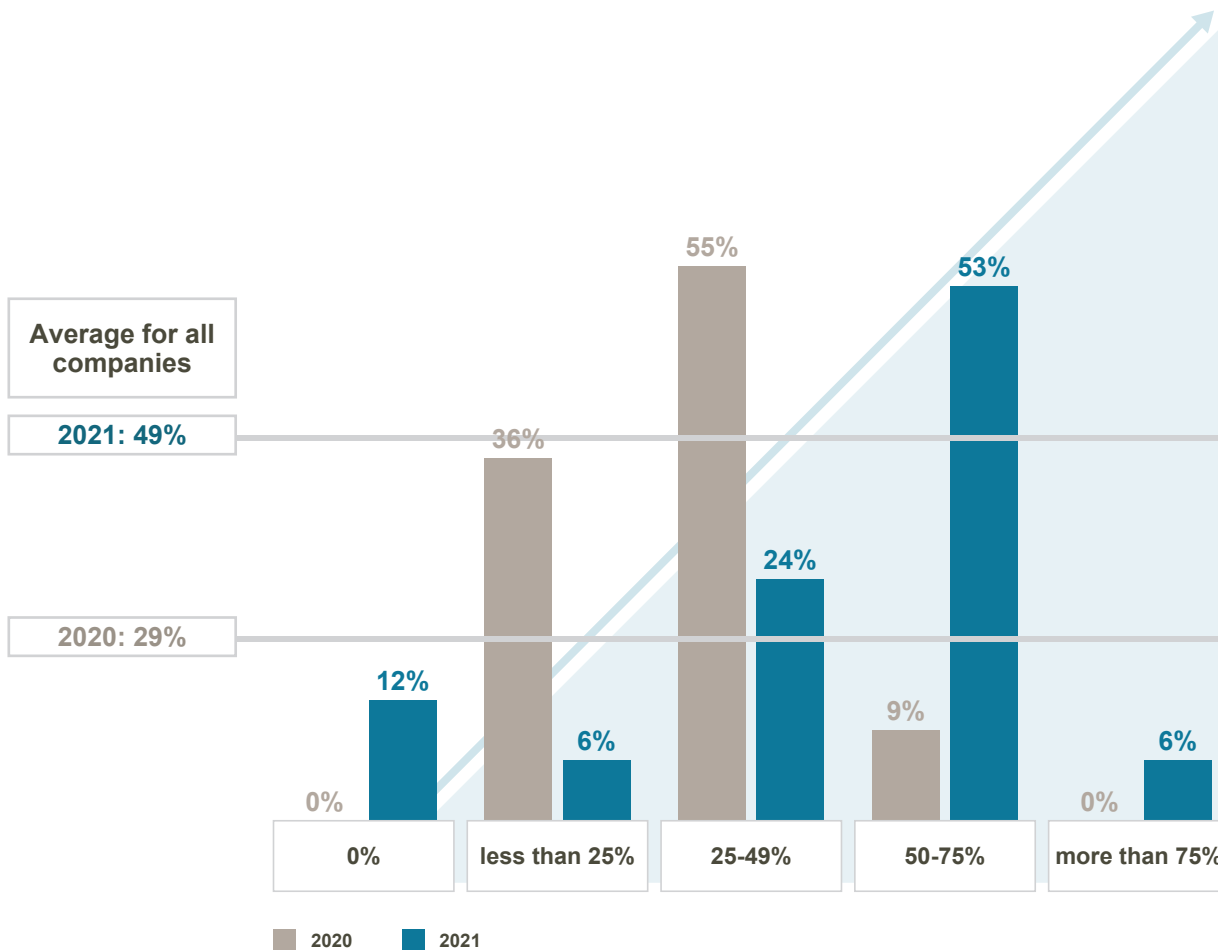
What do you believe would most help the “bounce back” of exhibitions?



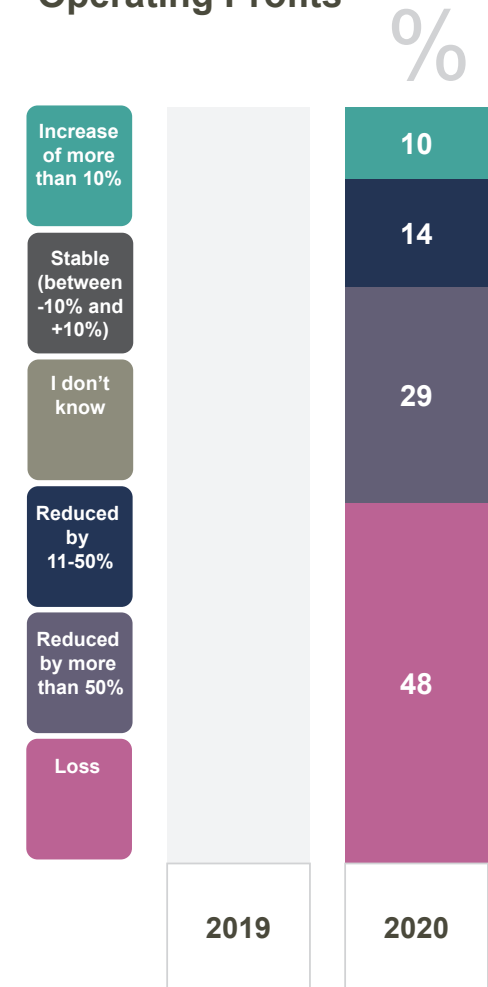
Detailed results for France



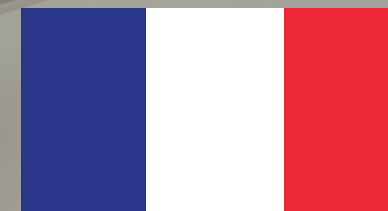
Revenue compared to 2019



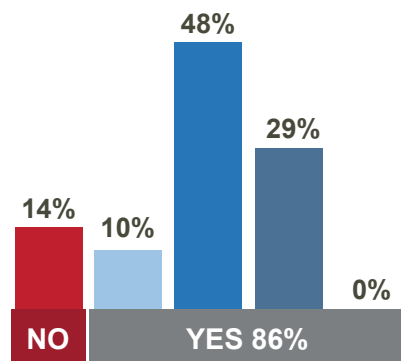
Operating Profits



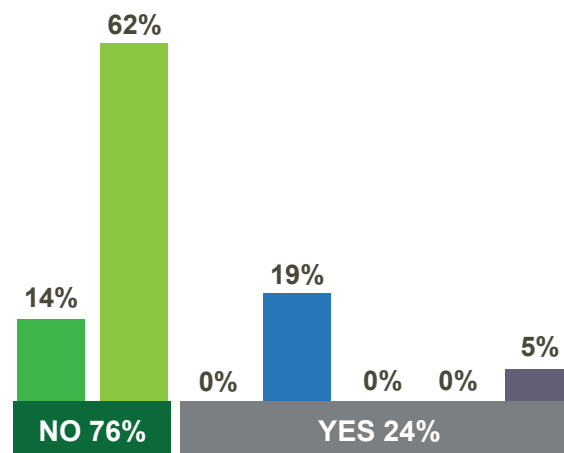
Detailed results for France



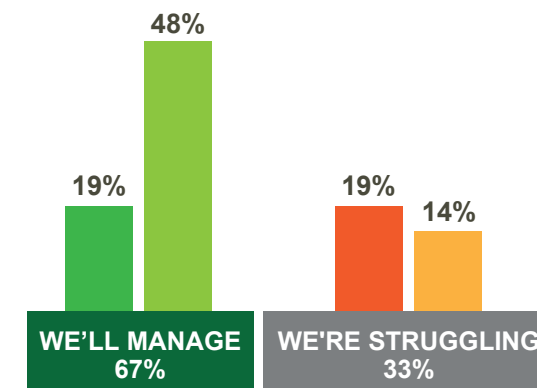
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?

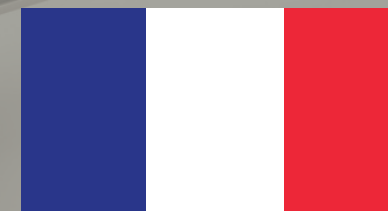


- No
- Yes, for less than 10% of our 2019 overall costs
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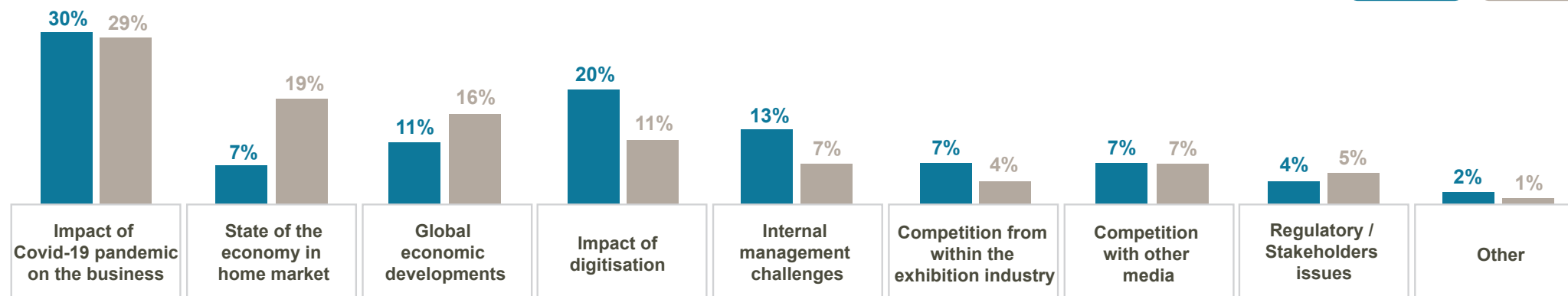
Detailed results for France



Most important business issues in the exhibition industry

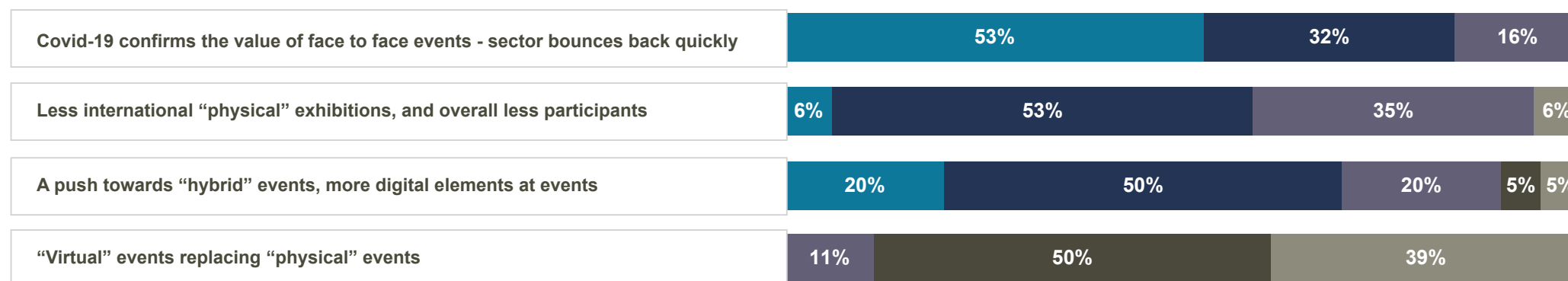
France

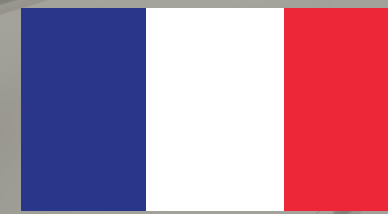
Global



Format of exhibitions in the coming years

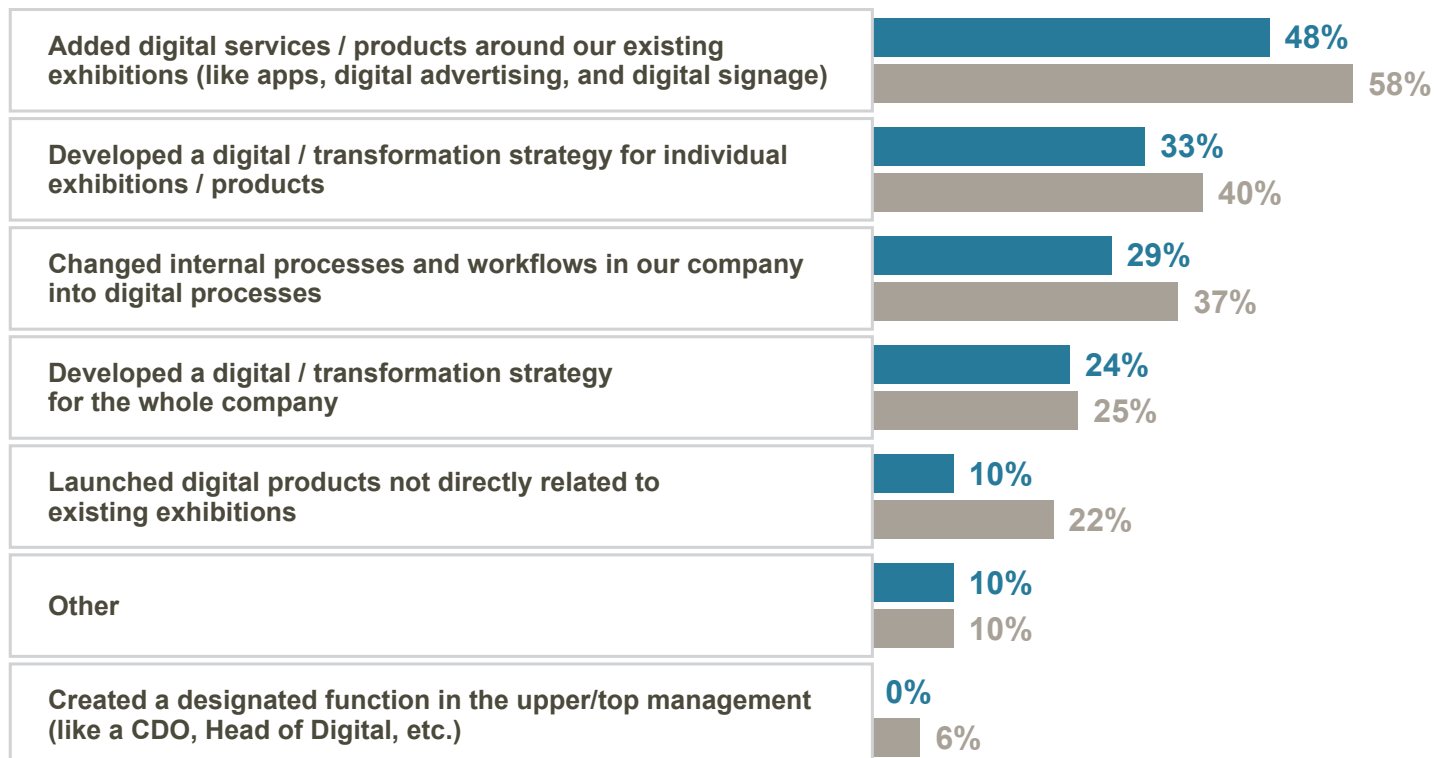
Yes, for sure Most probably Not sure Not sure at all Definitely not

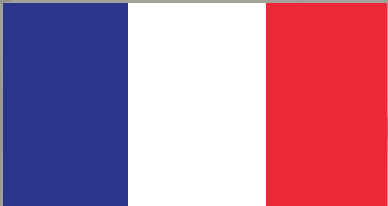




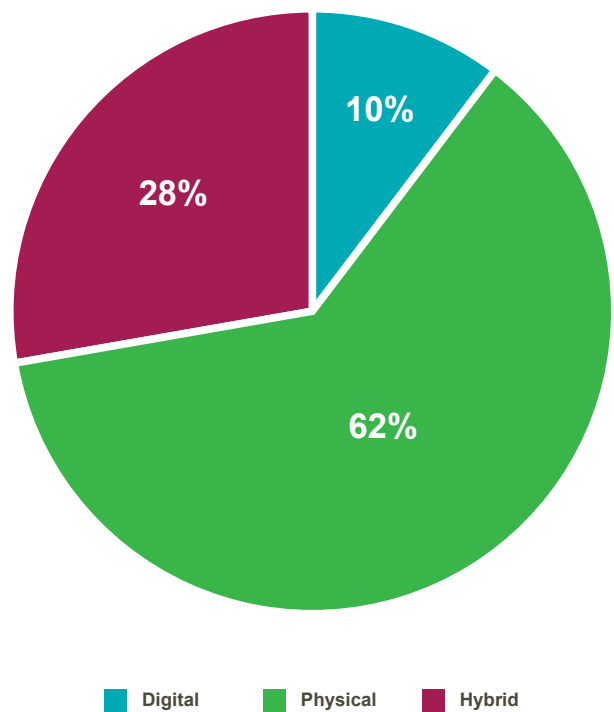
France Global

Digitisation: implementation in France and globally

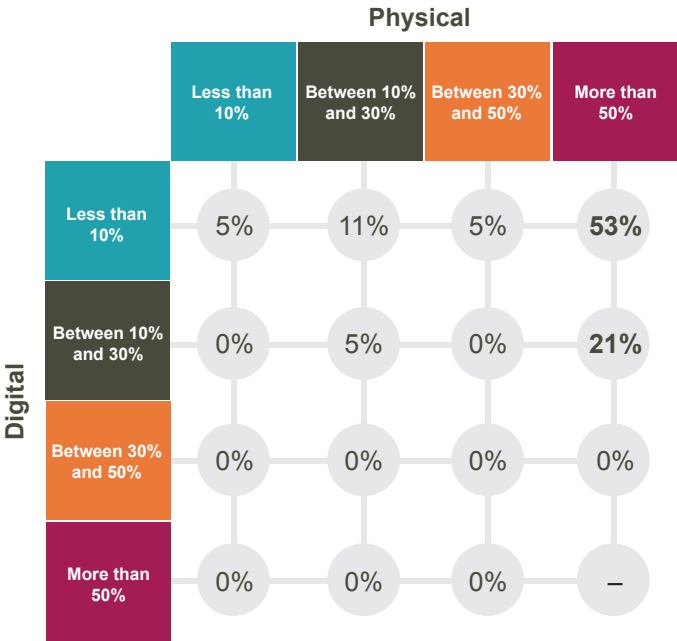




Number of fairs projected in 2021

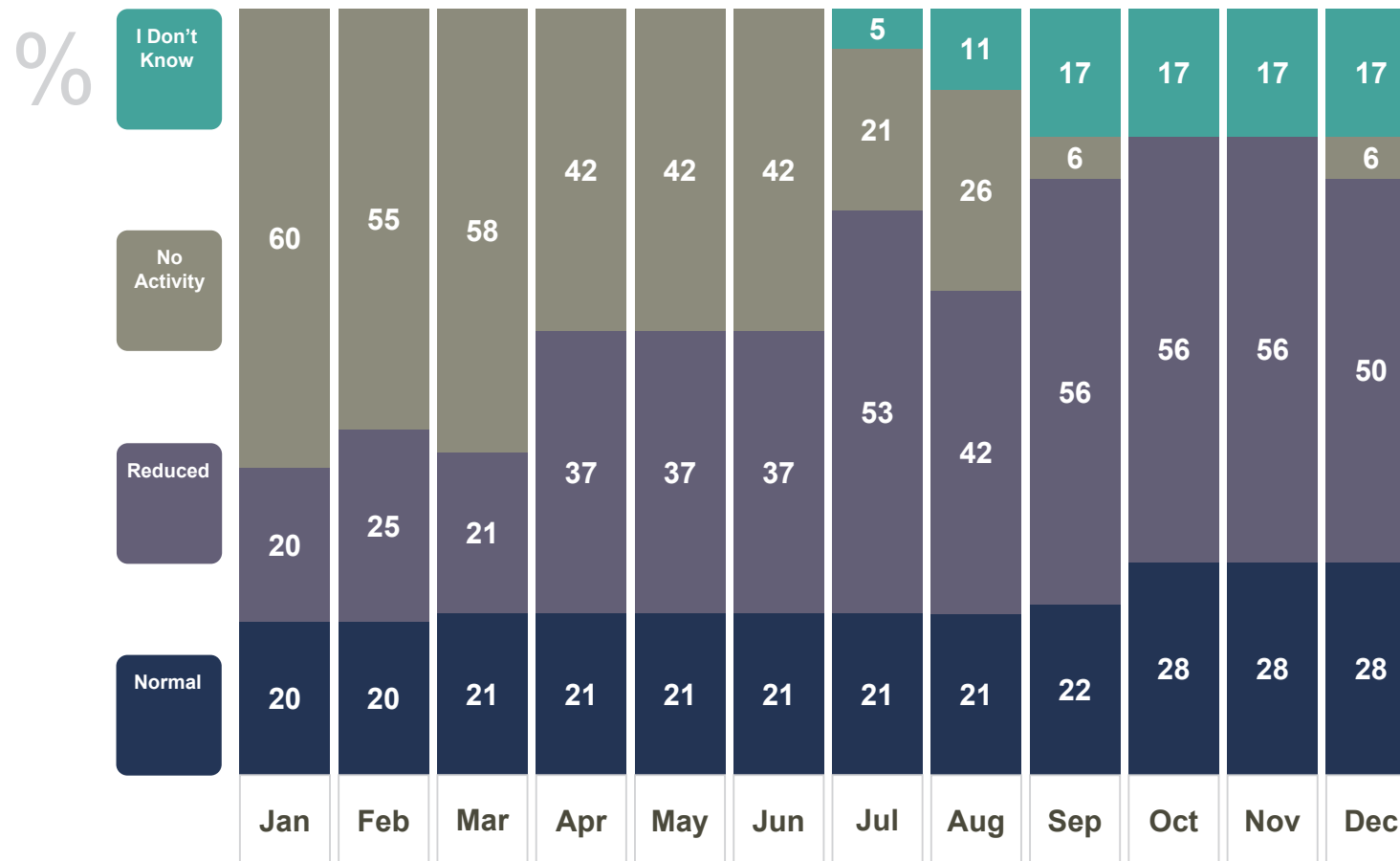


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



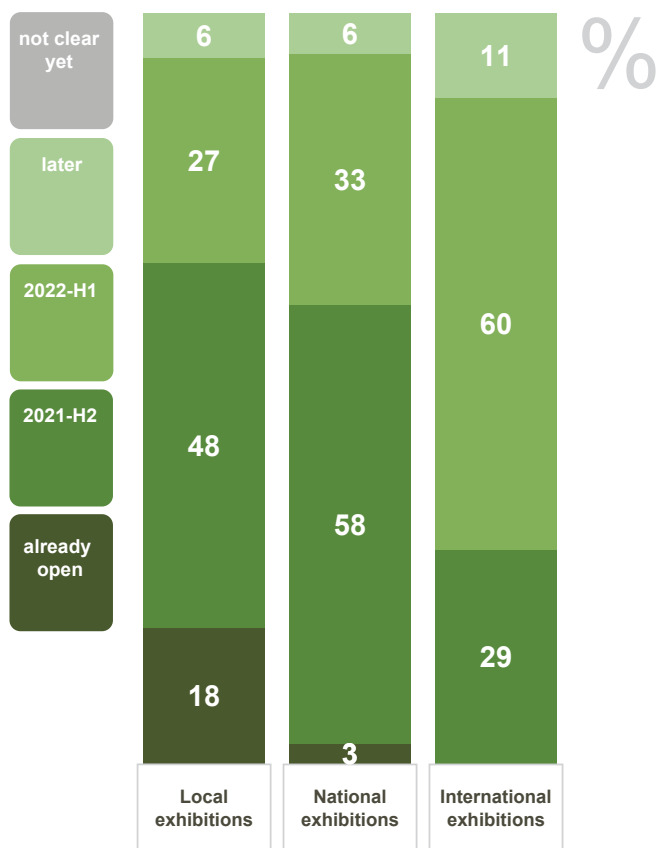


Situation of industry operations in 2021

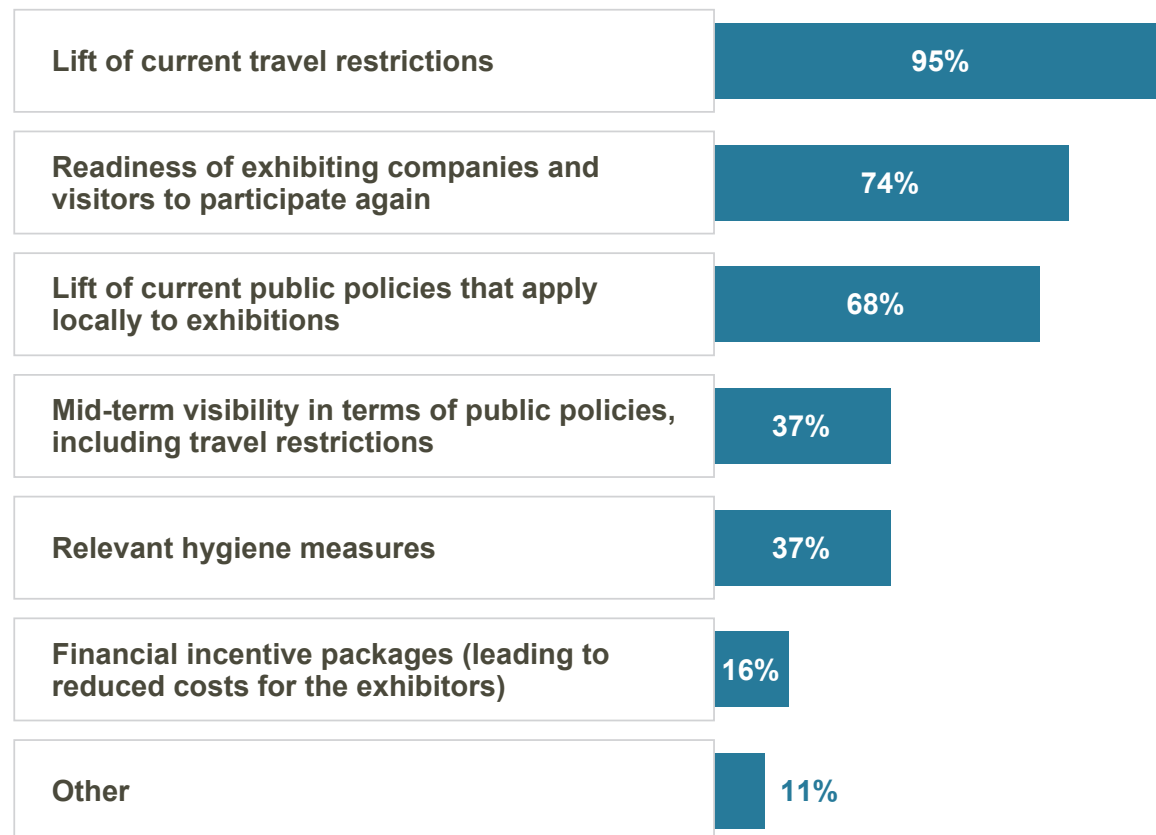




When do you believe exhibitions will open again in your city?



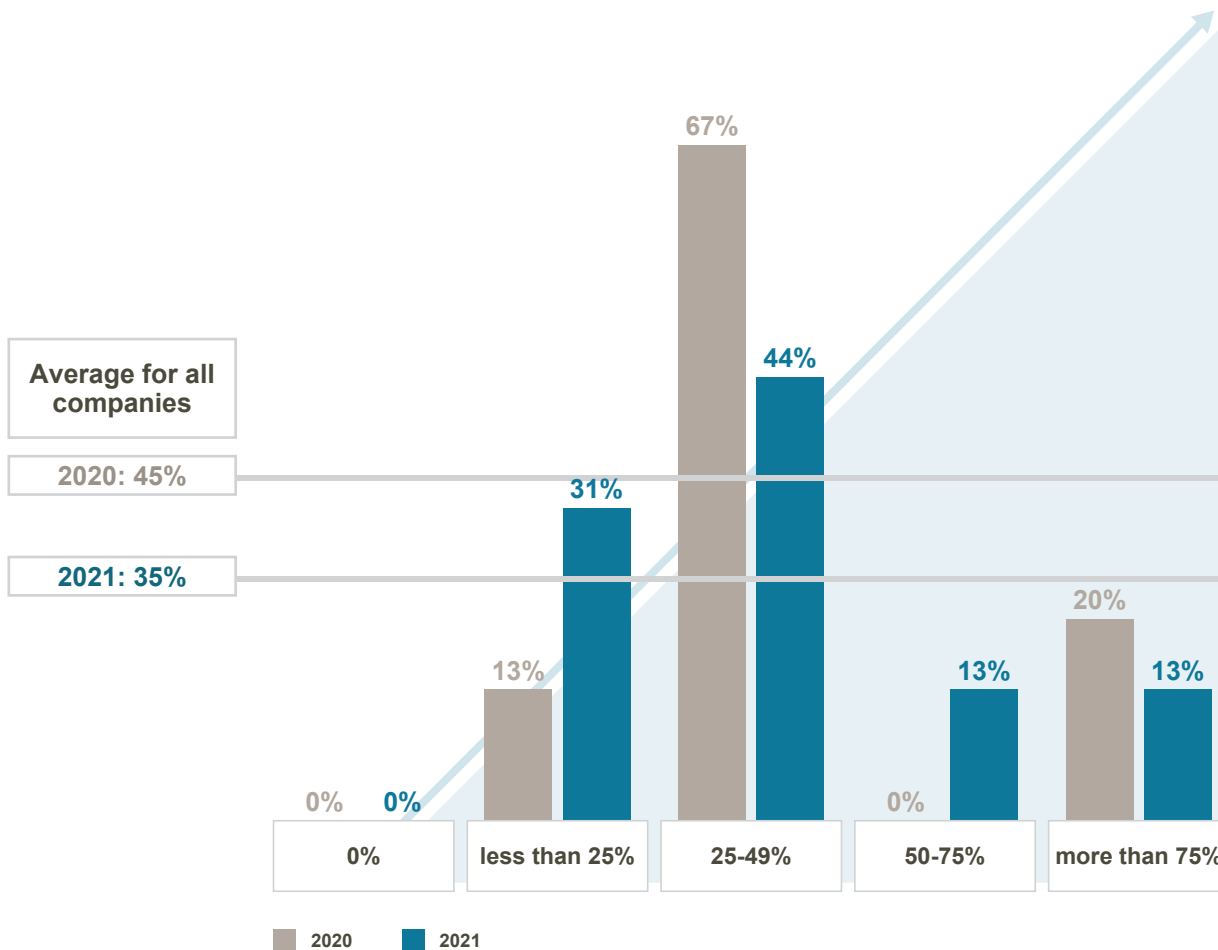
What do you believe would most help the “bounce back” of exhibitions?



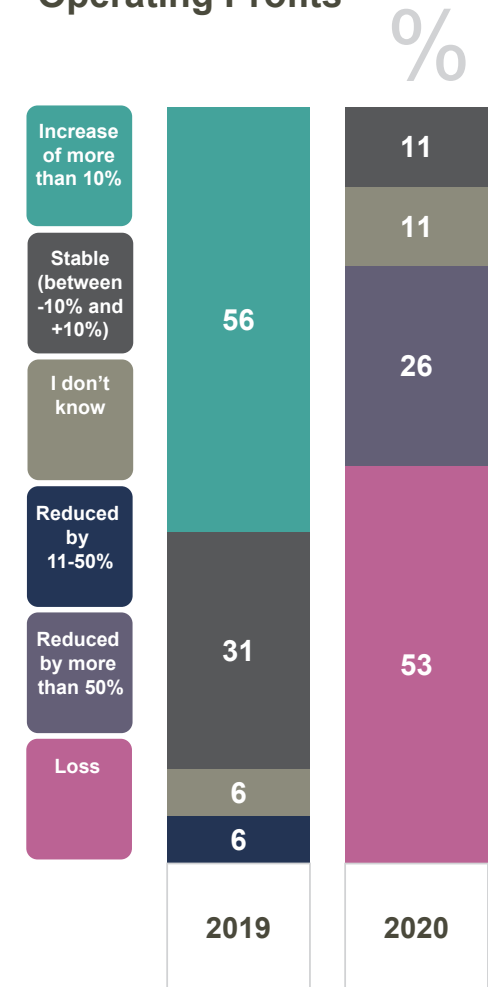
Detailed results for Germany



Revenue compared to 2019



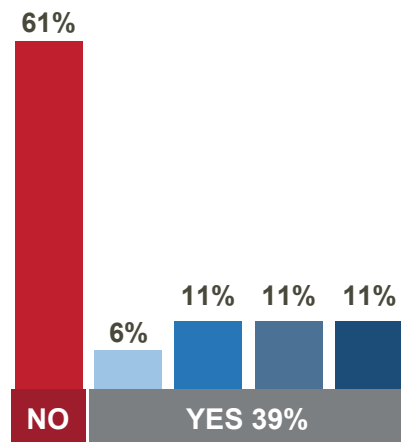
Operating Profits



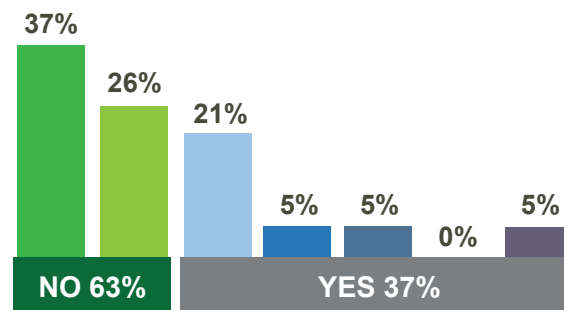
Detailed results for Germany



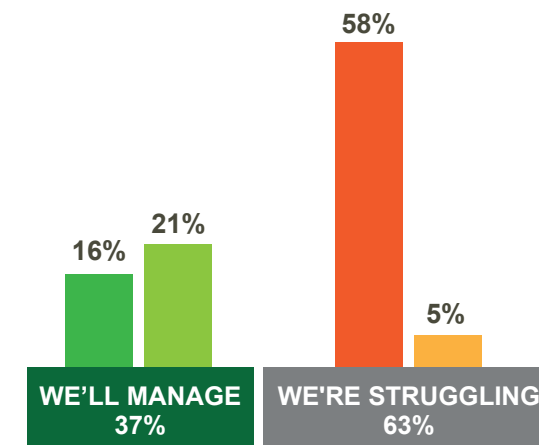
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

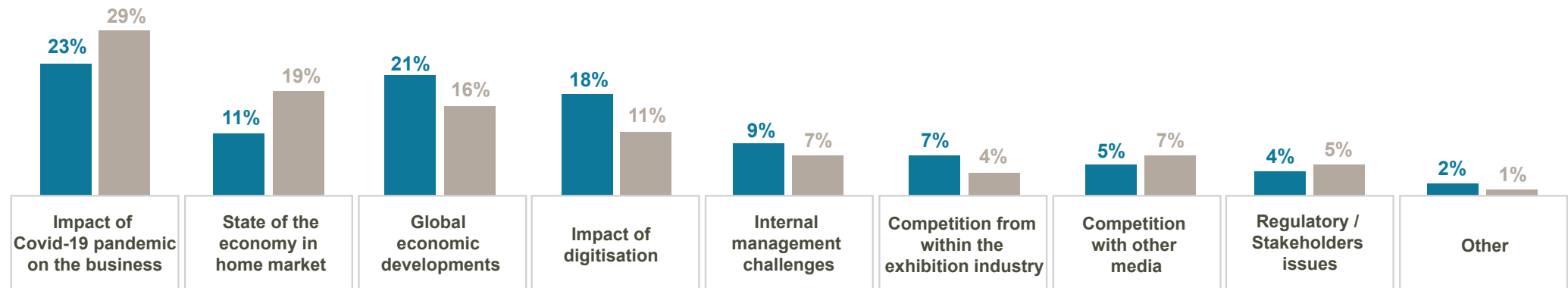
Detailed results for Germany



Most important business issues in the exhibition industry

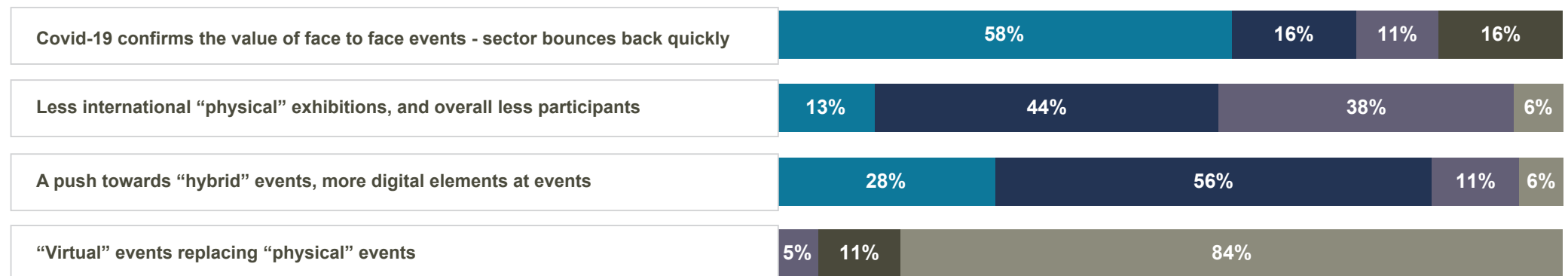
Germany

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

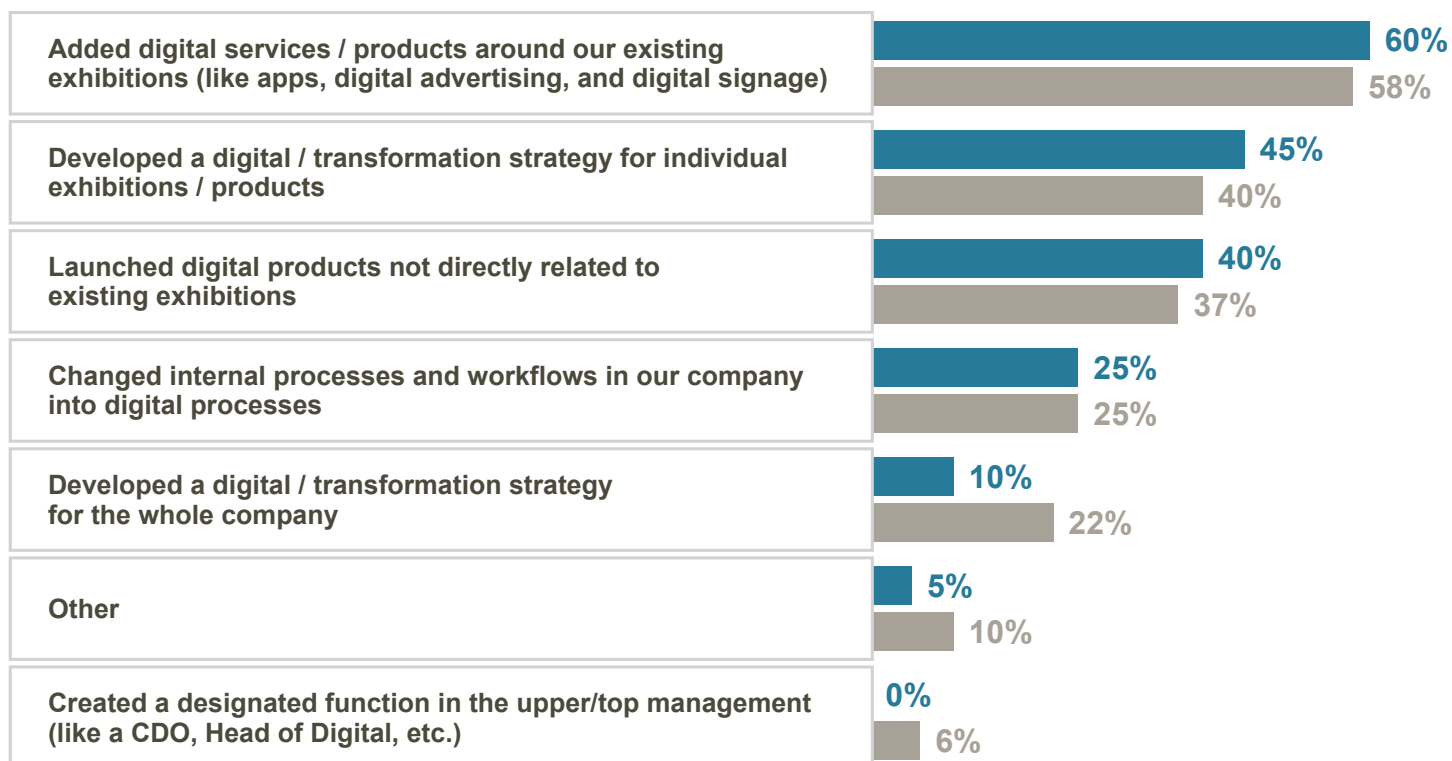




Germany

Global

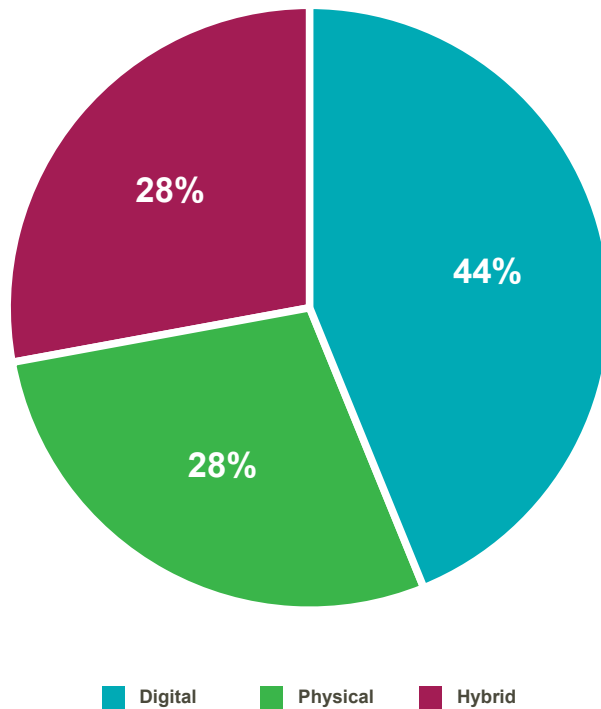
Digitisation: implementation in Germany and globally



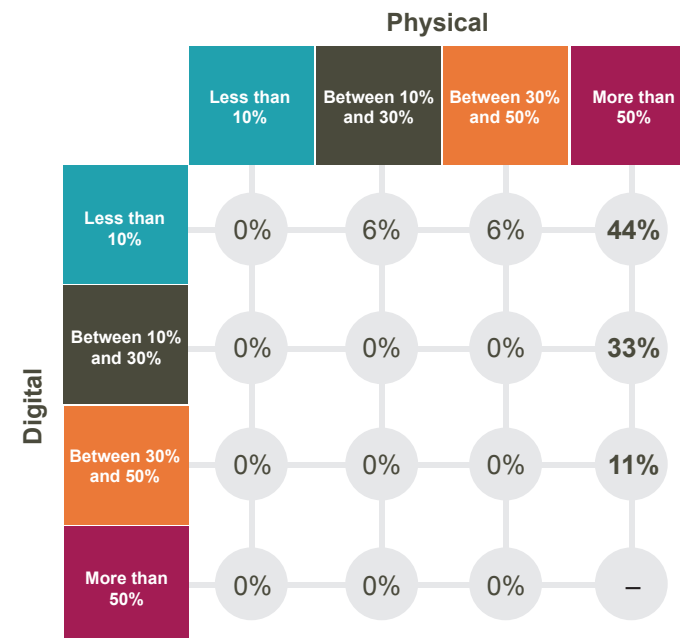
Detailed results for Germany

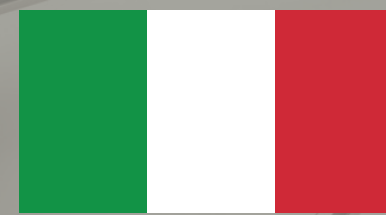


Number of fairs projected in 2021

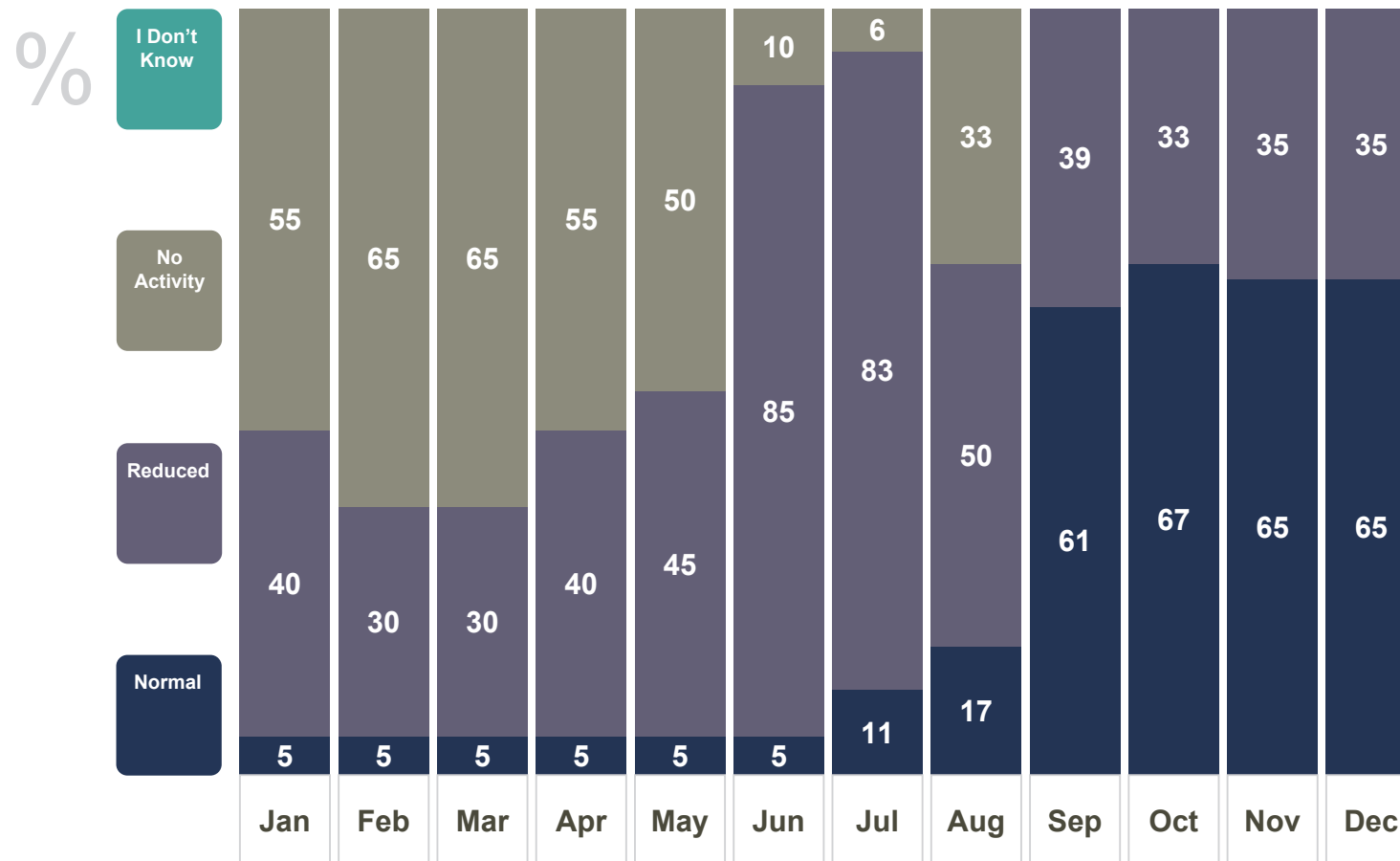


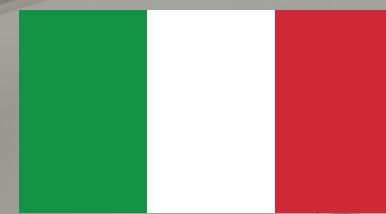
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



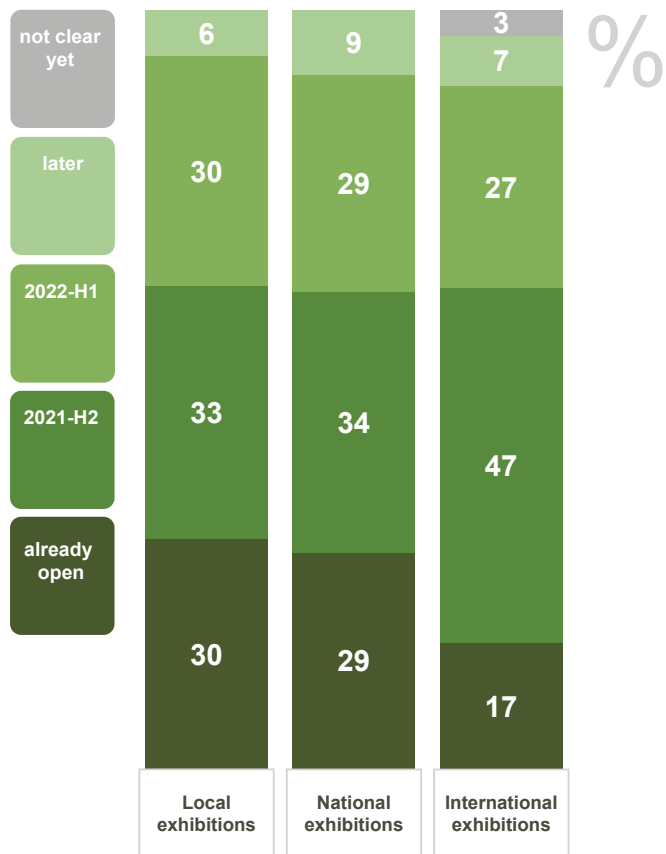


Situation of industry operations in 2021

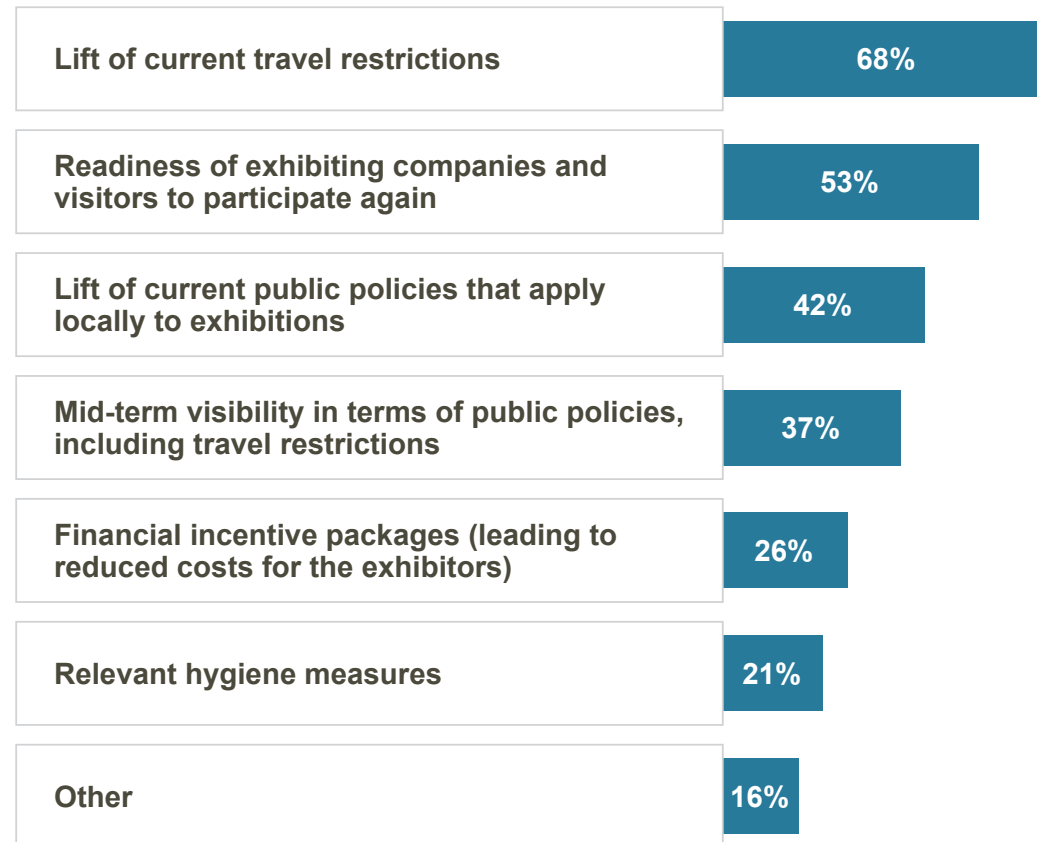


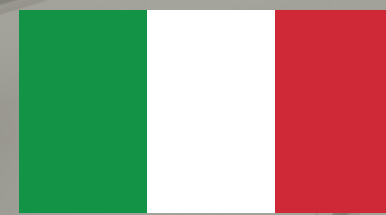


When do you believe exhibitions will open again in your city?

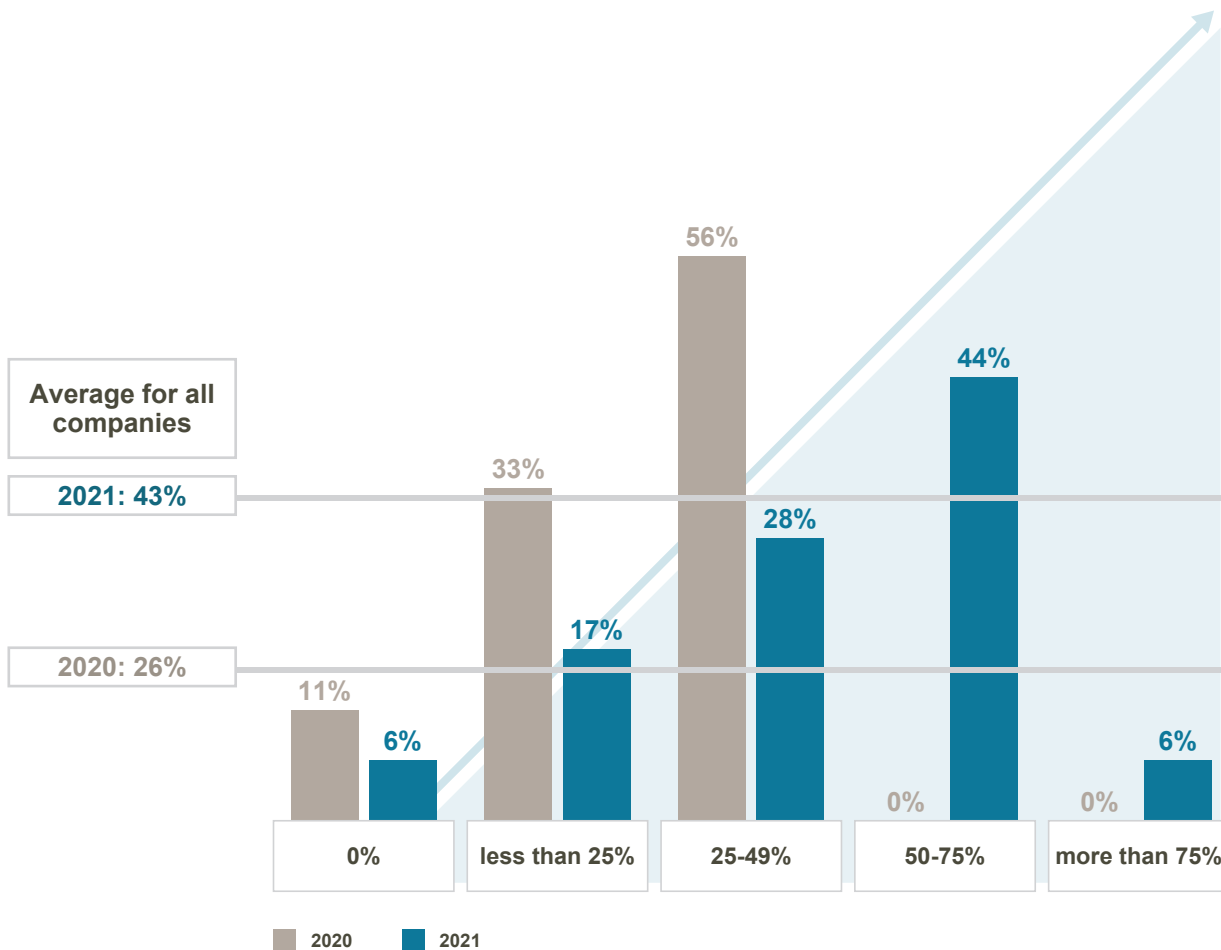


What do you believe would most help the “bounce back” of exhibitions?

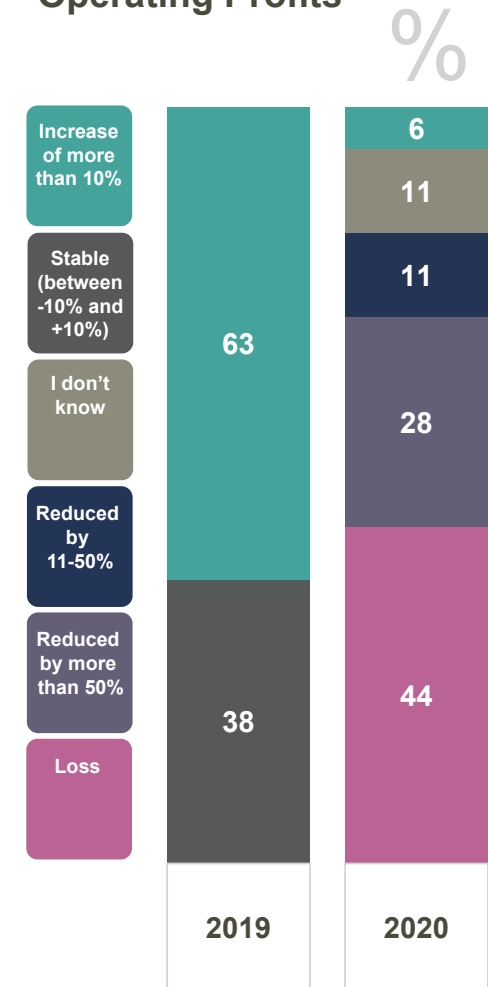


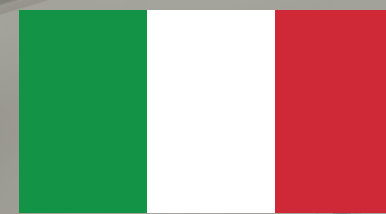


Revenue compared to 2019

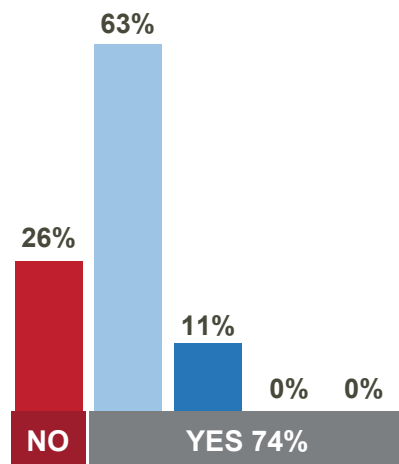


Operating Profits

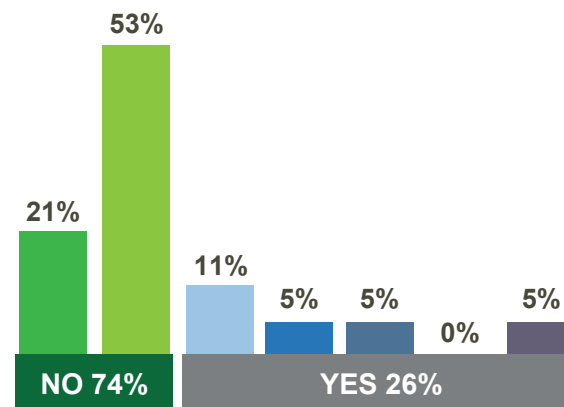




Did your company benefit from public financial support?



Have you had to reduce your workforce?



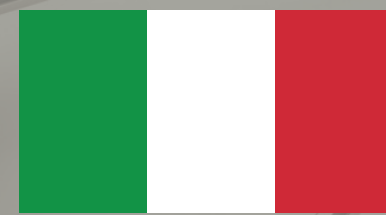
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- Yes, we shut down to the minimum

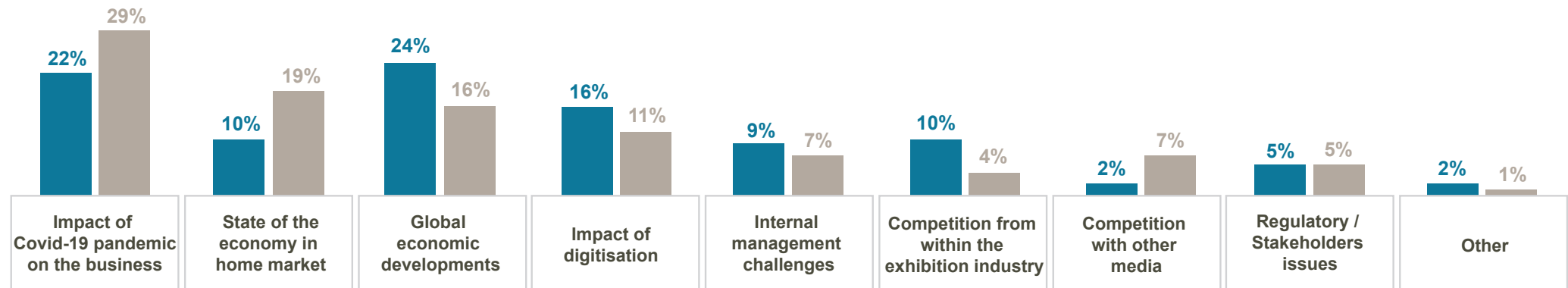
- It's okay, we have extended our offering to other profitable work areas
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Most important business issues in the exhibition industry

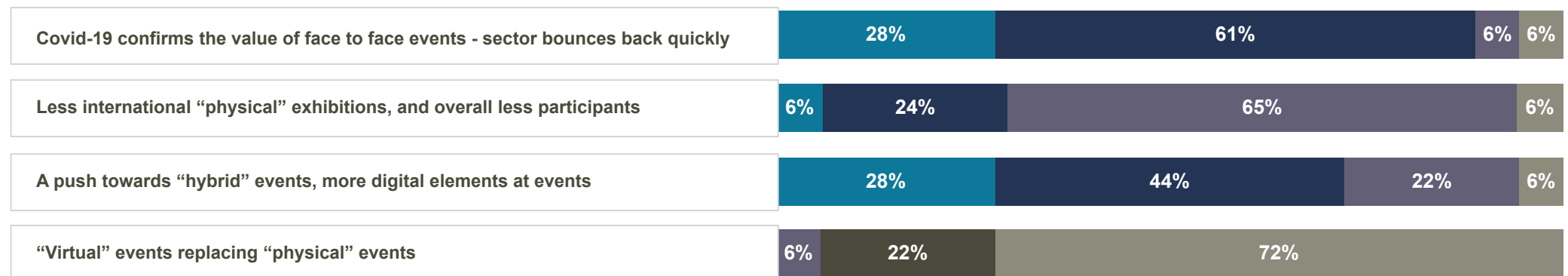
Italy

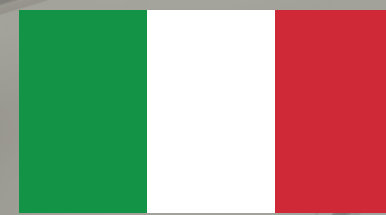
Global



Format of exhibitions in the coming years

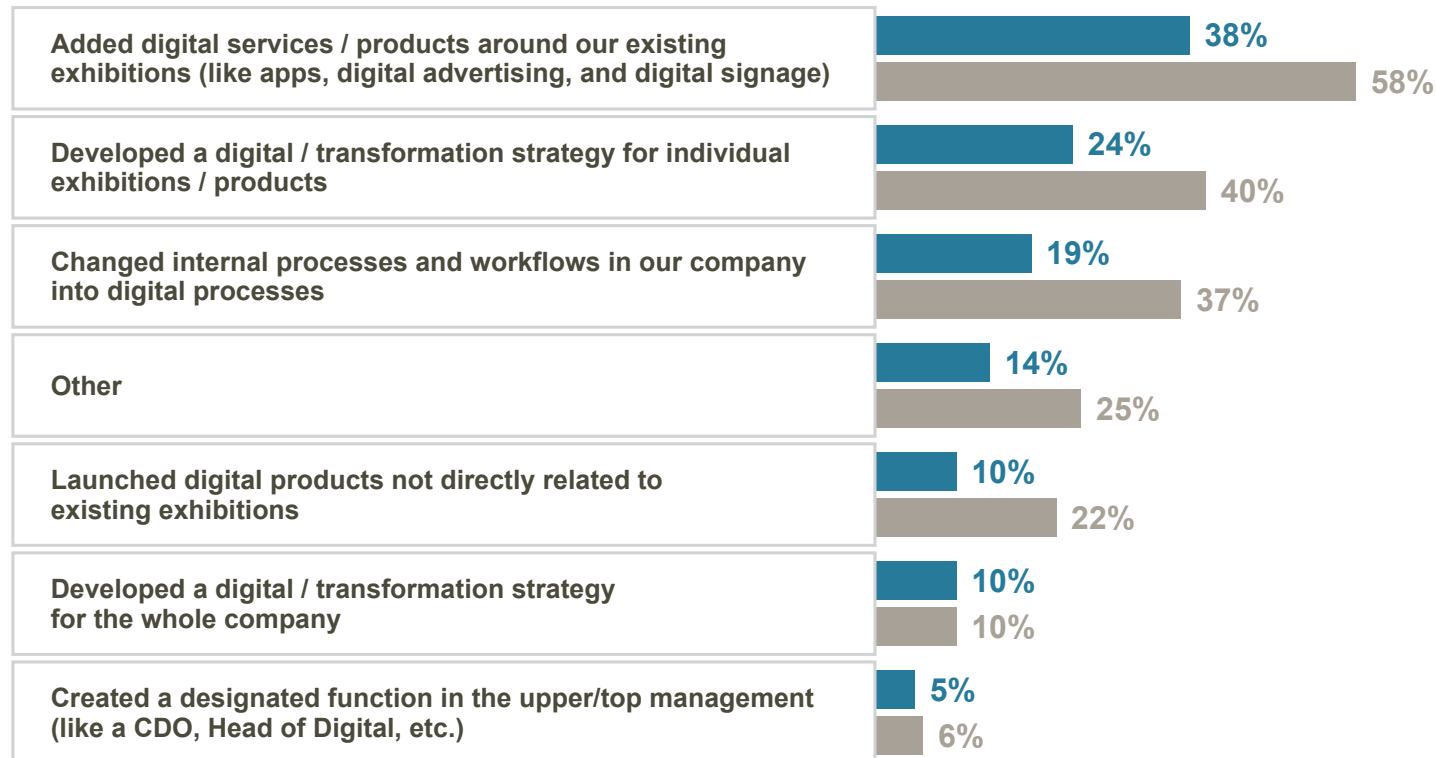
Yes, for sure Most probably Not sure Not sure at all Definitely not

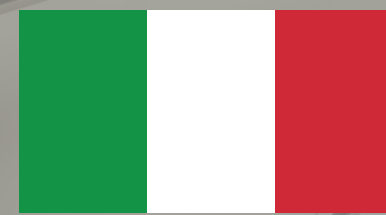




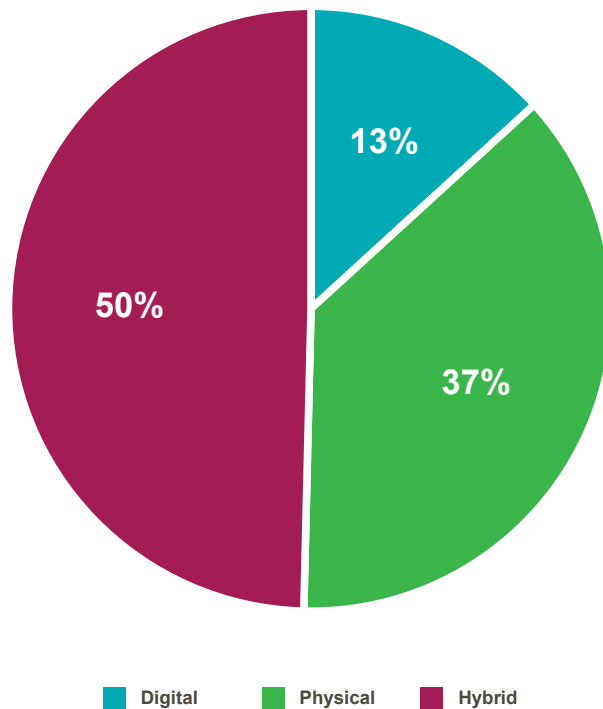
Italy Global

Digitisation: implementation in Italy and globally

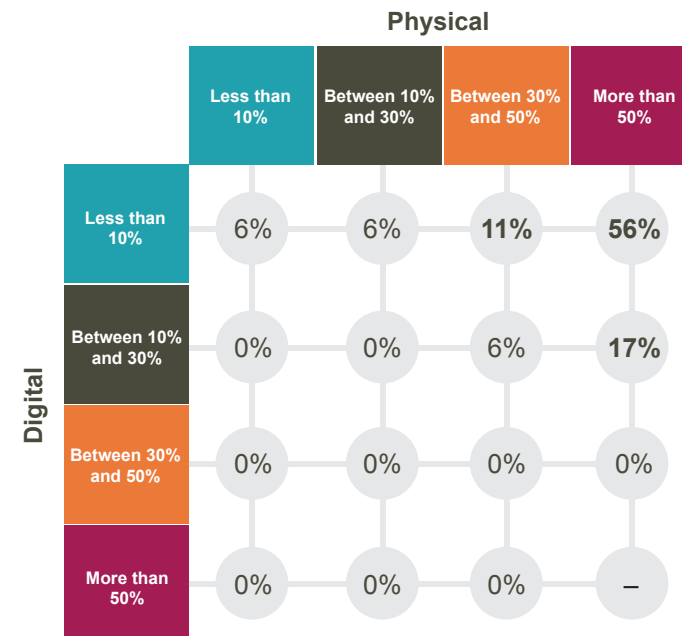


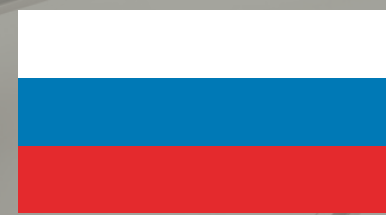


Number of fairs projected in 2021

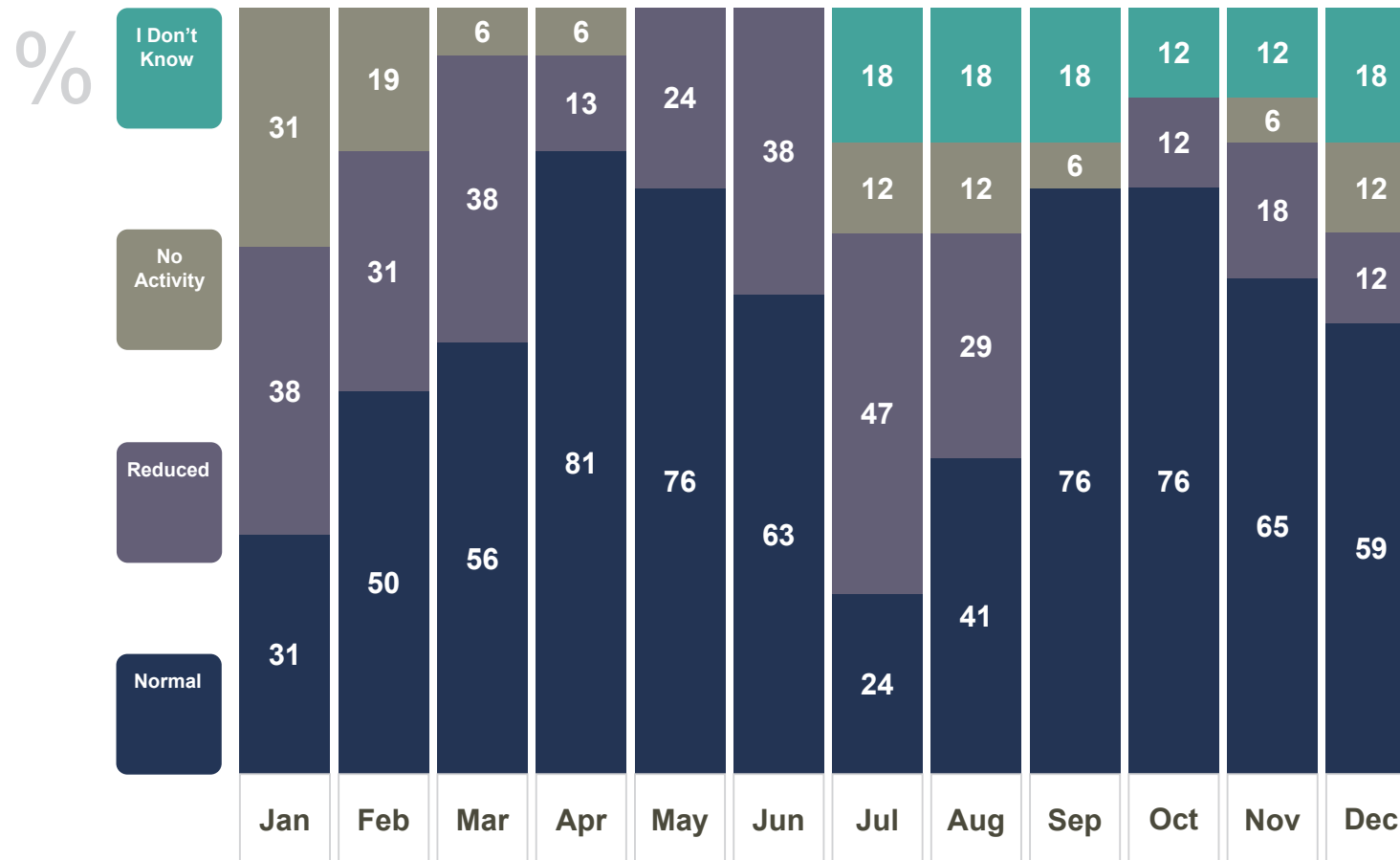


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

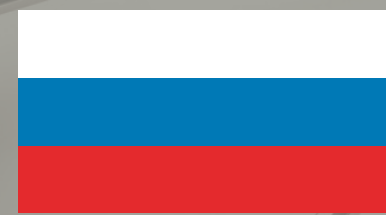




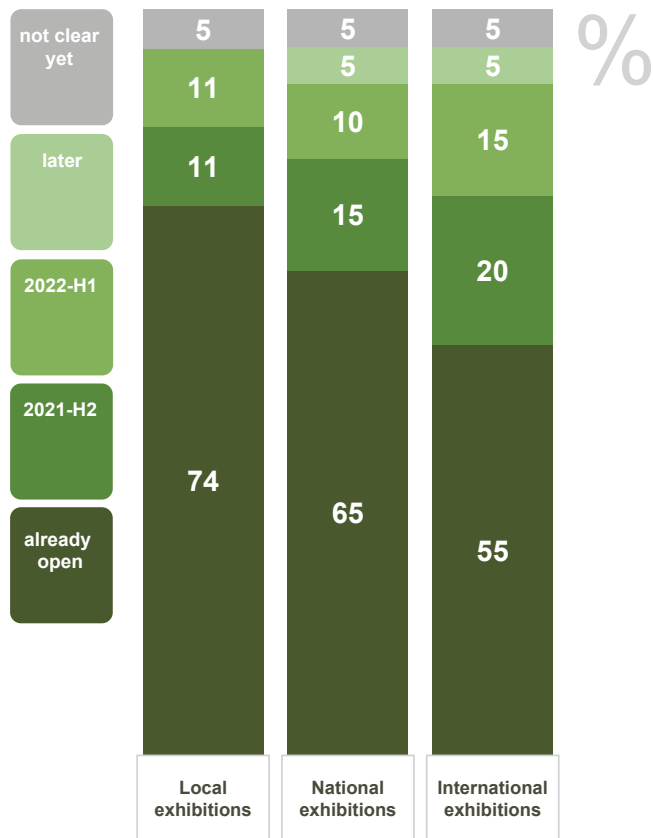
Situation of industry operations in 2021



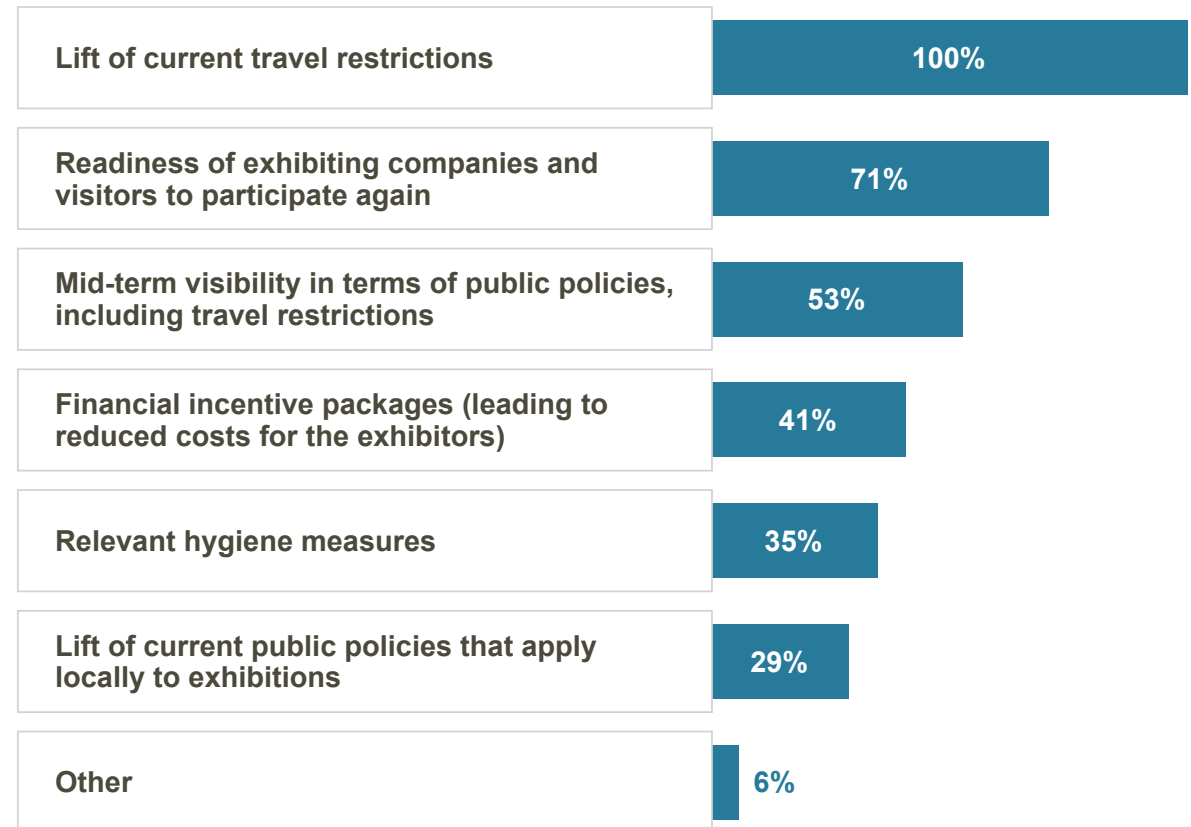
Detailed results for Russian Federation



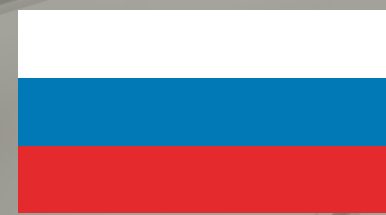
When do you believe exhibitions will open again in your city?



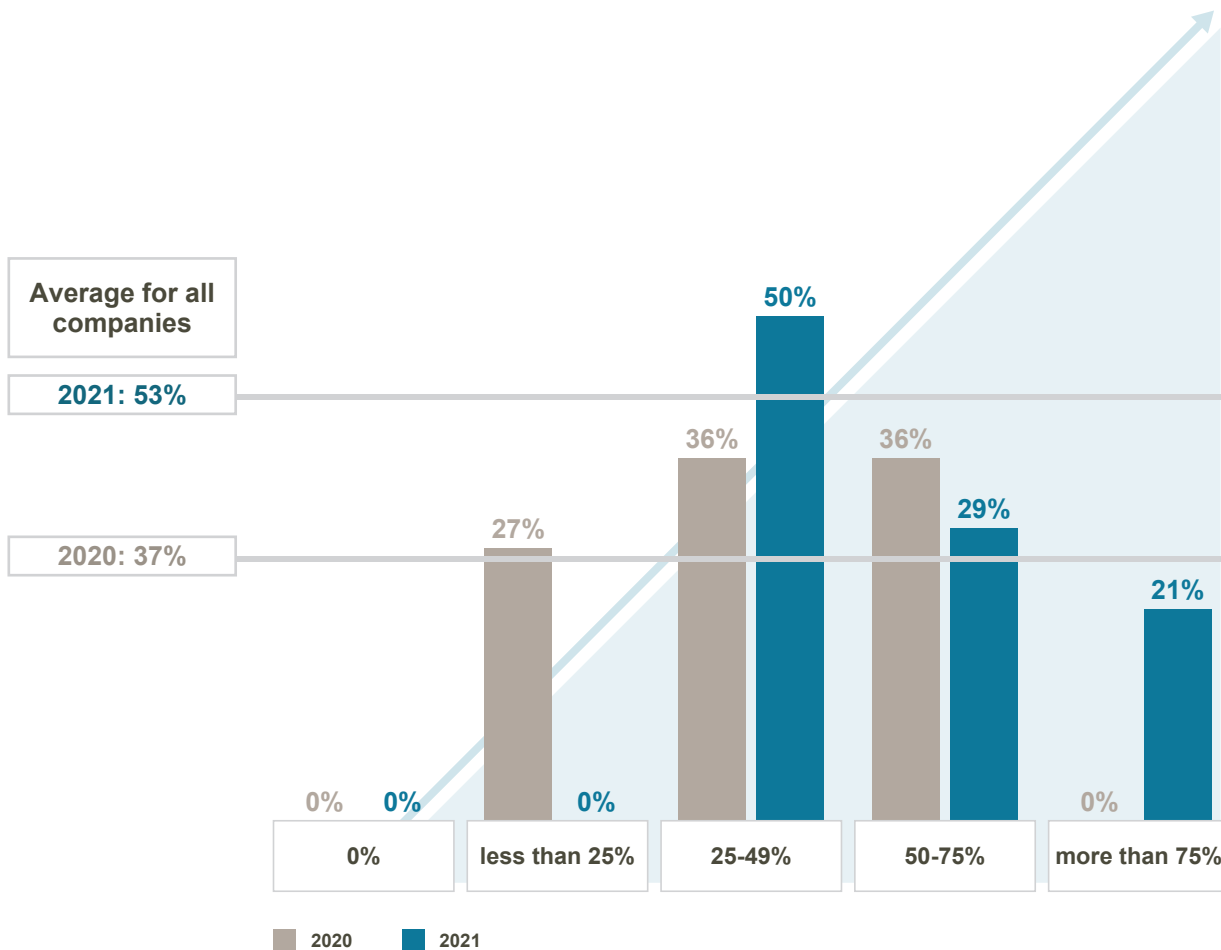
What do you believe would most help the “bounce back” of exhibitions?



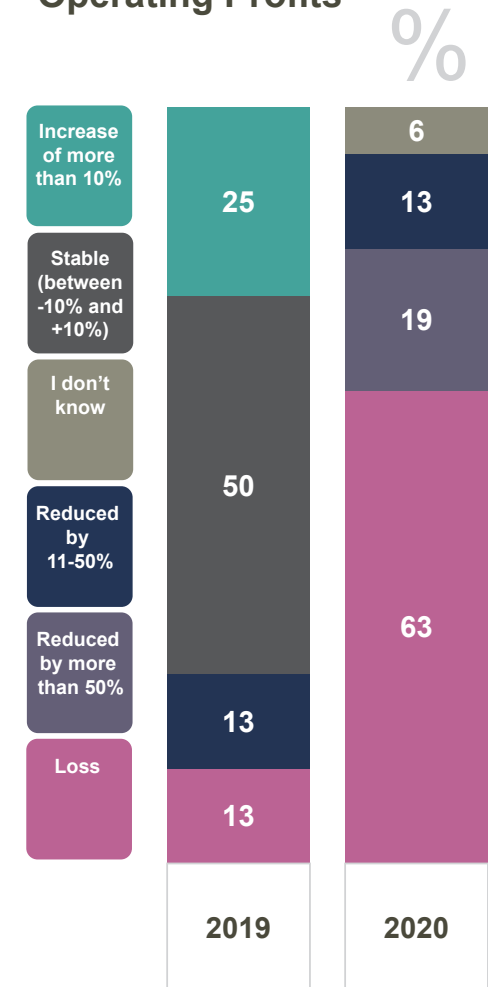
Detailed results for Russian Federation



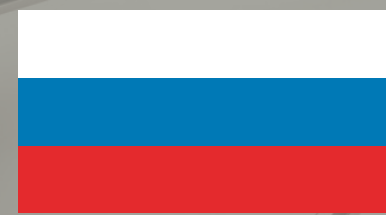
Revenue compared to 2019



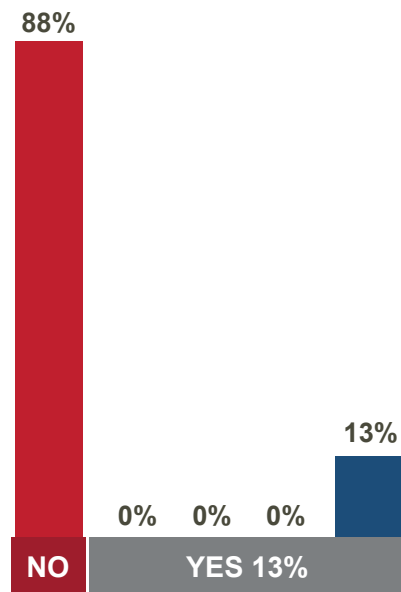
Operating Profits



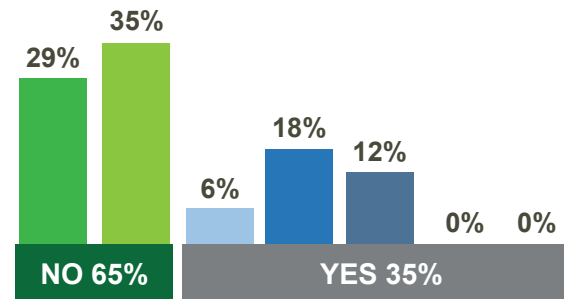
Detailed results for Russian Federation



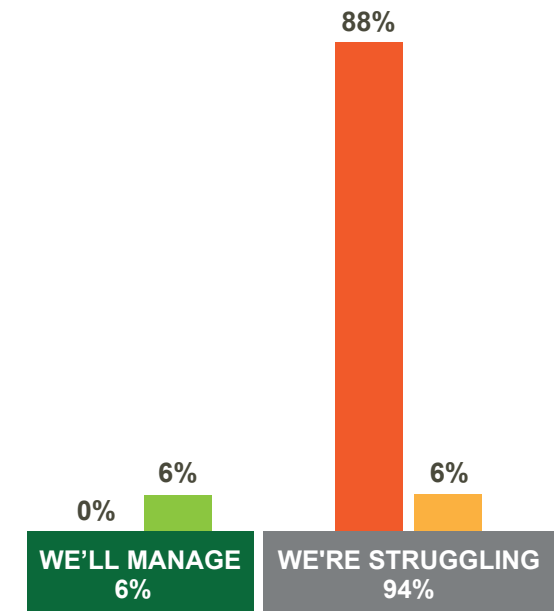
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?

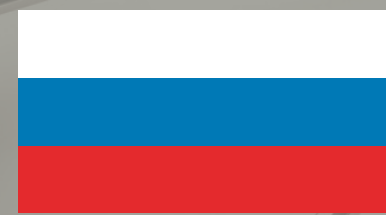


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
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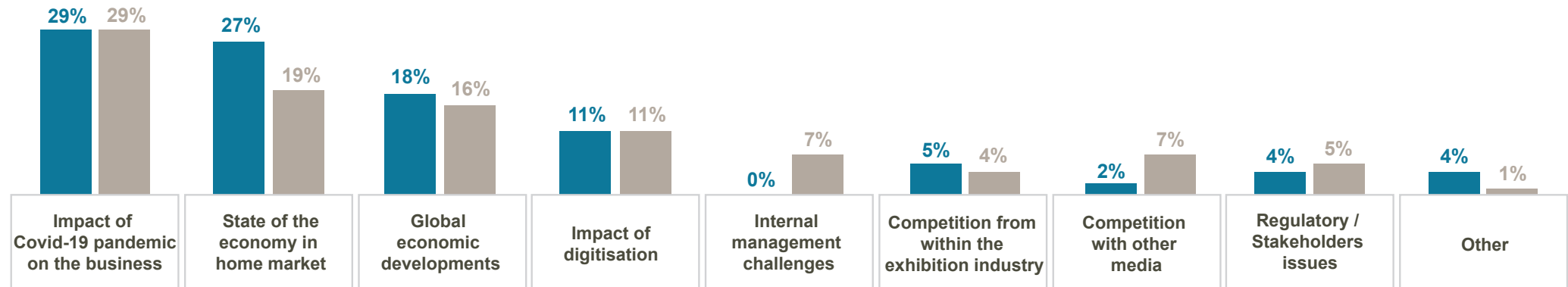
Detailed results for Russian Federation



Most important business issues in the exhibition industry

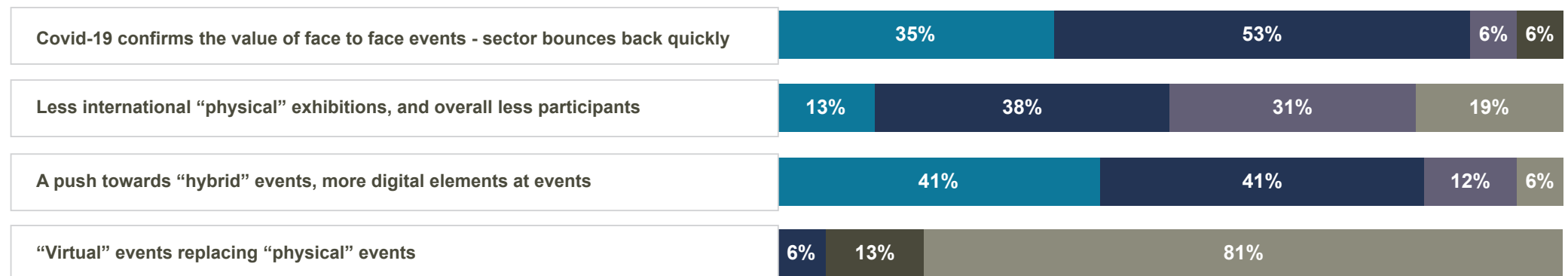
Russia

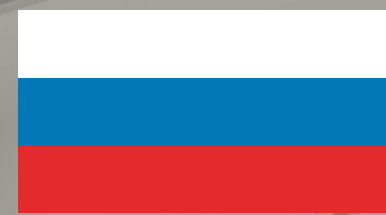
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

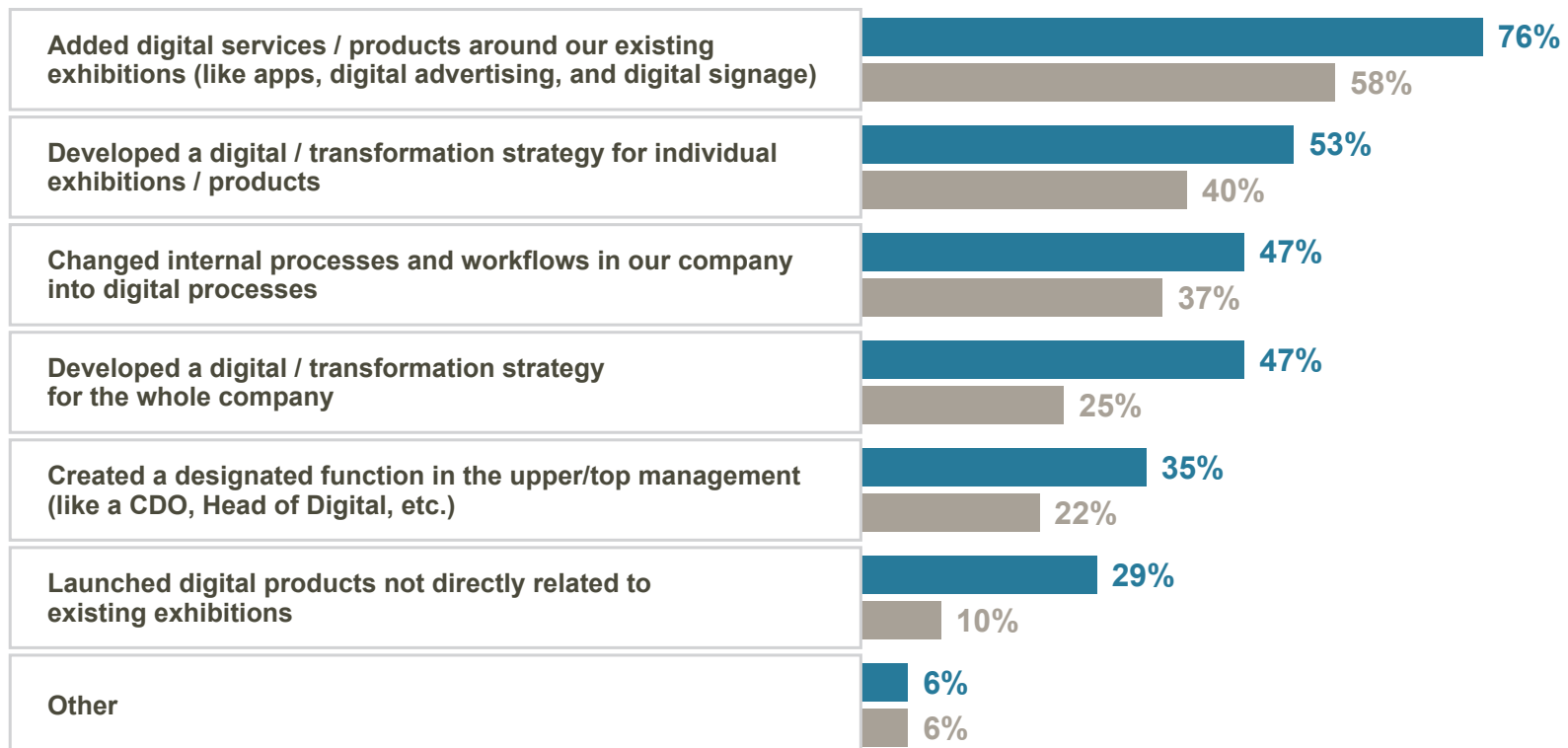




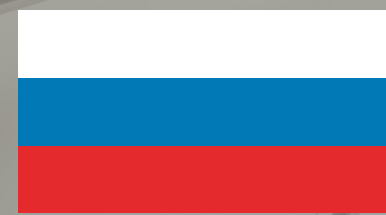
Russian Federation

Global

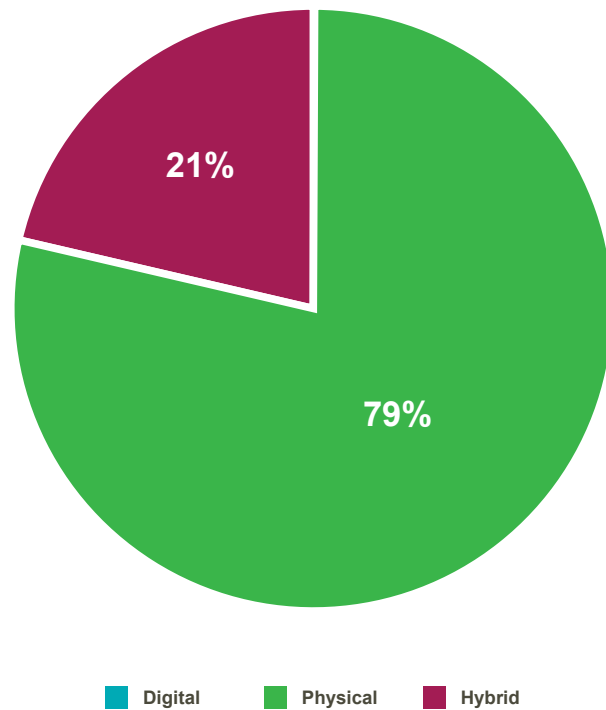
Digitisation: implementation in Russian Federation and globally



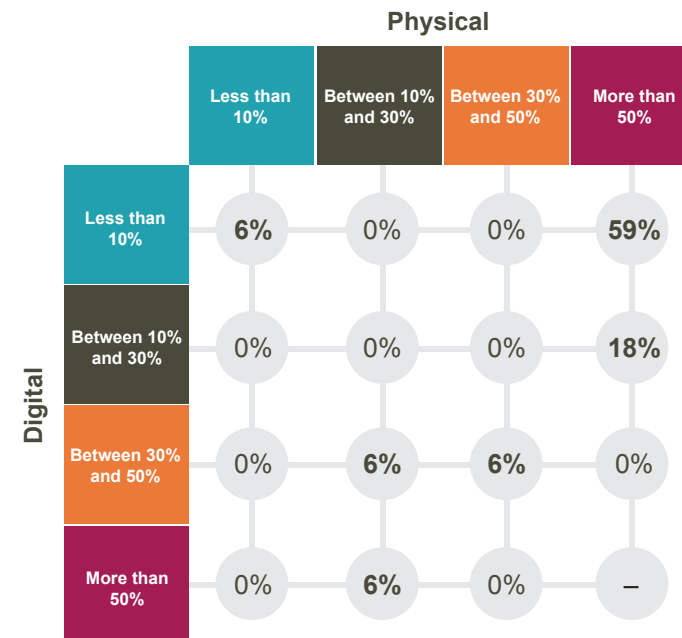
Detailed results for Russian Federation



Number of fairs projected in 2021

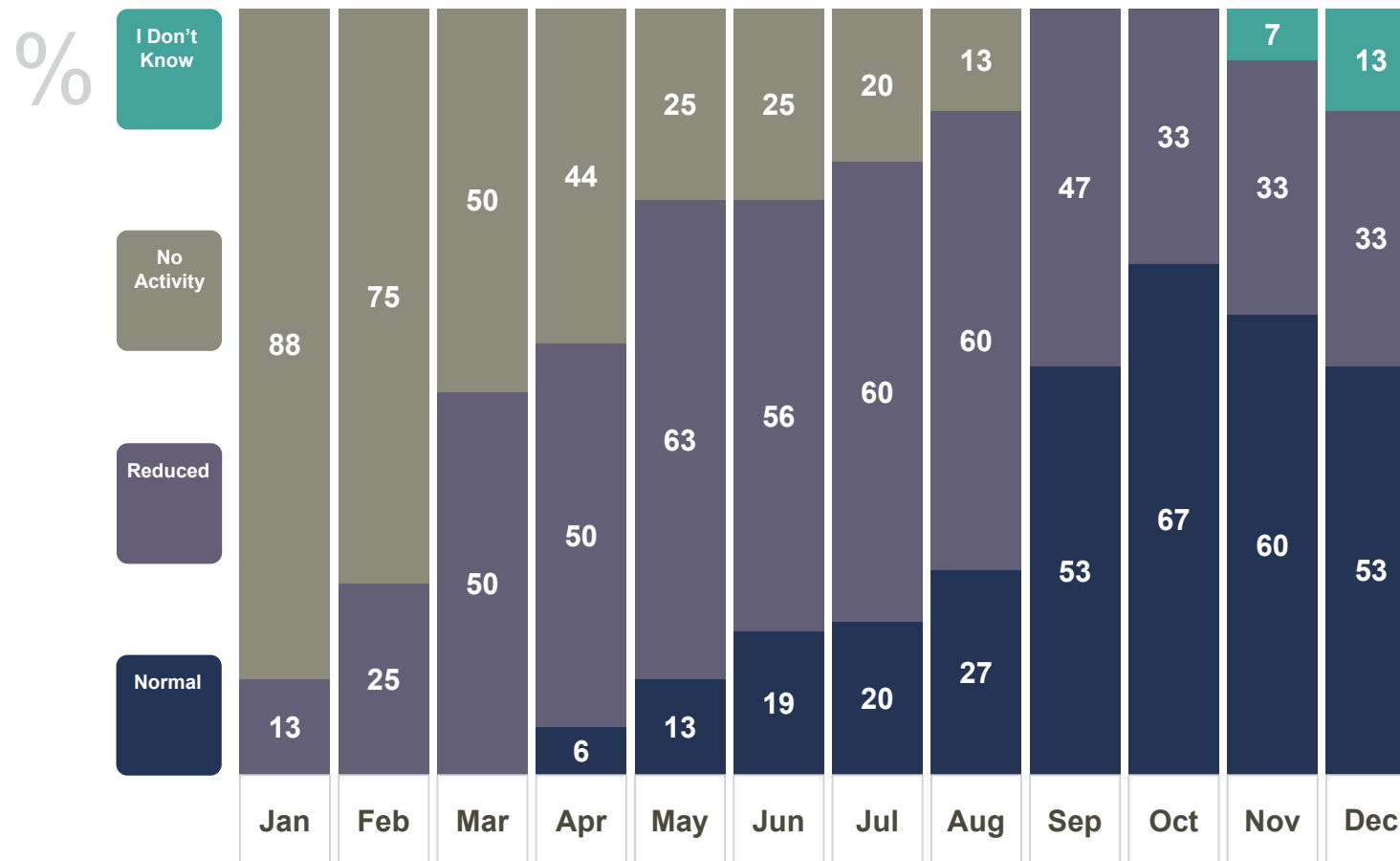


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



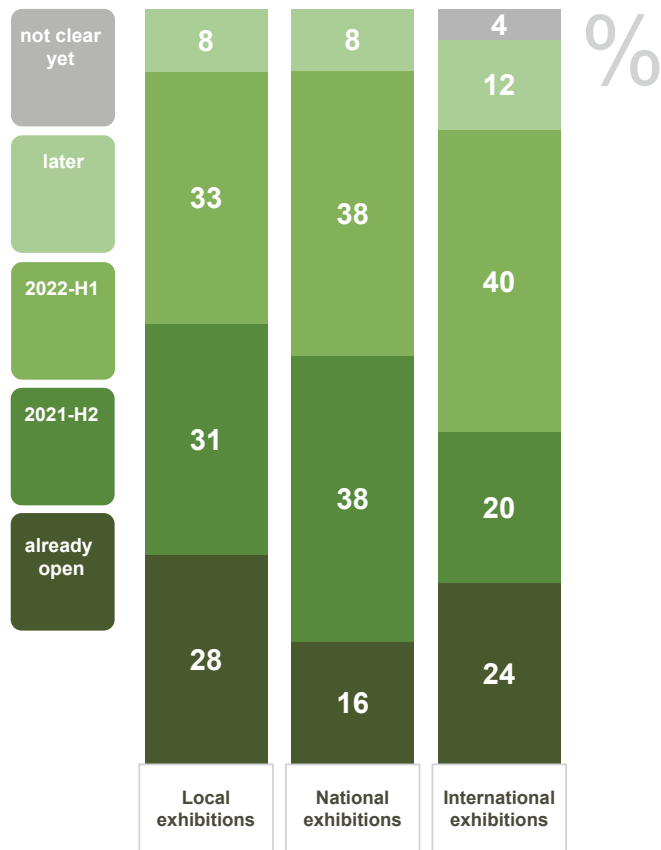


Situation of industry operations in 2021

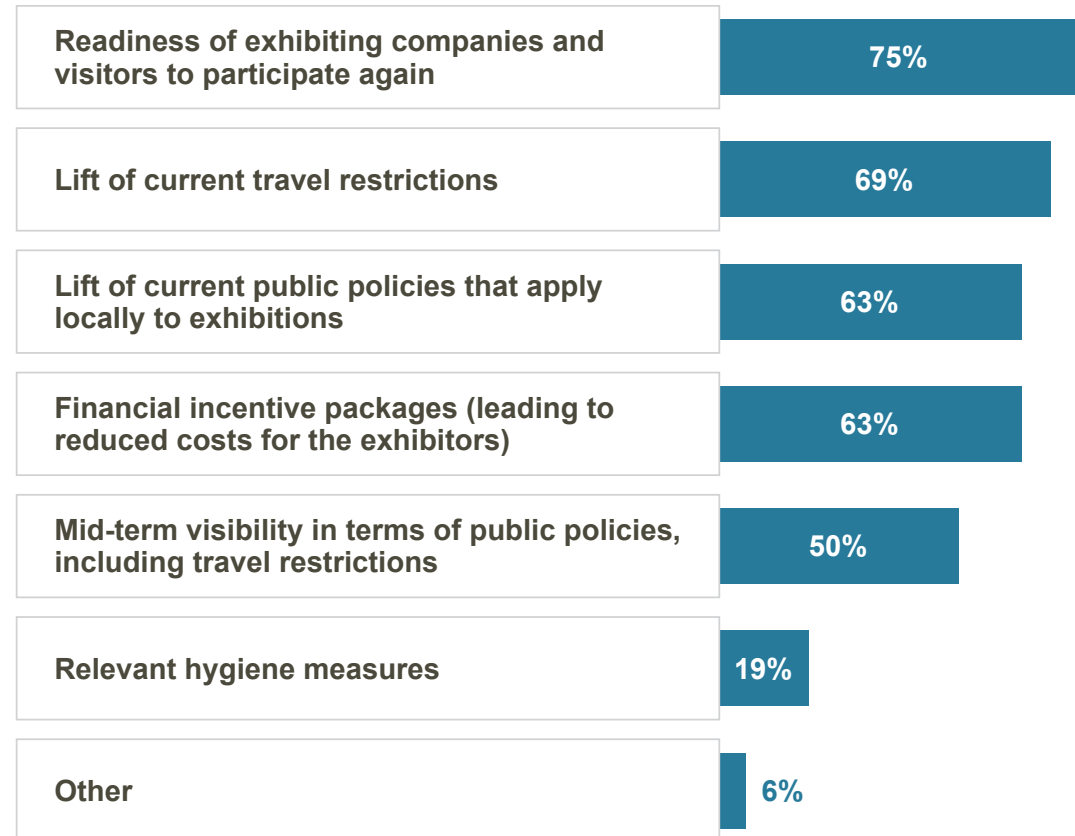




When do you believe exhibitions will open again in your city?



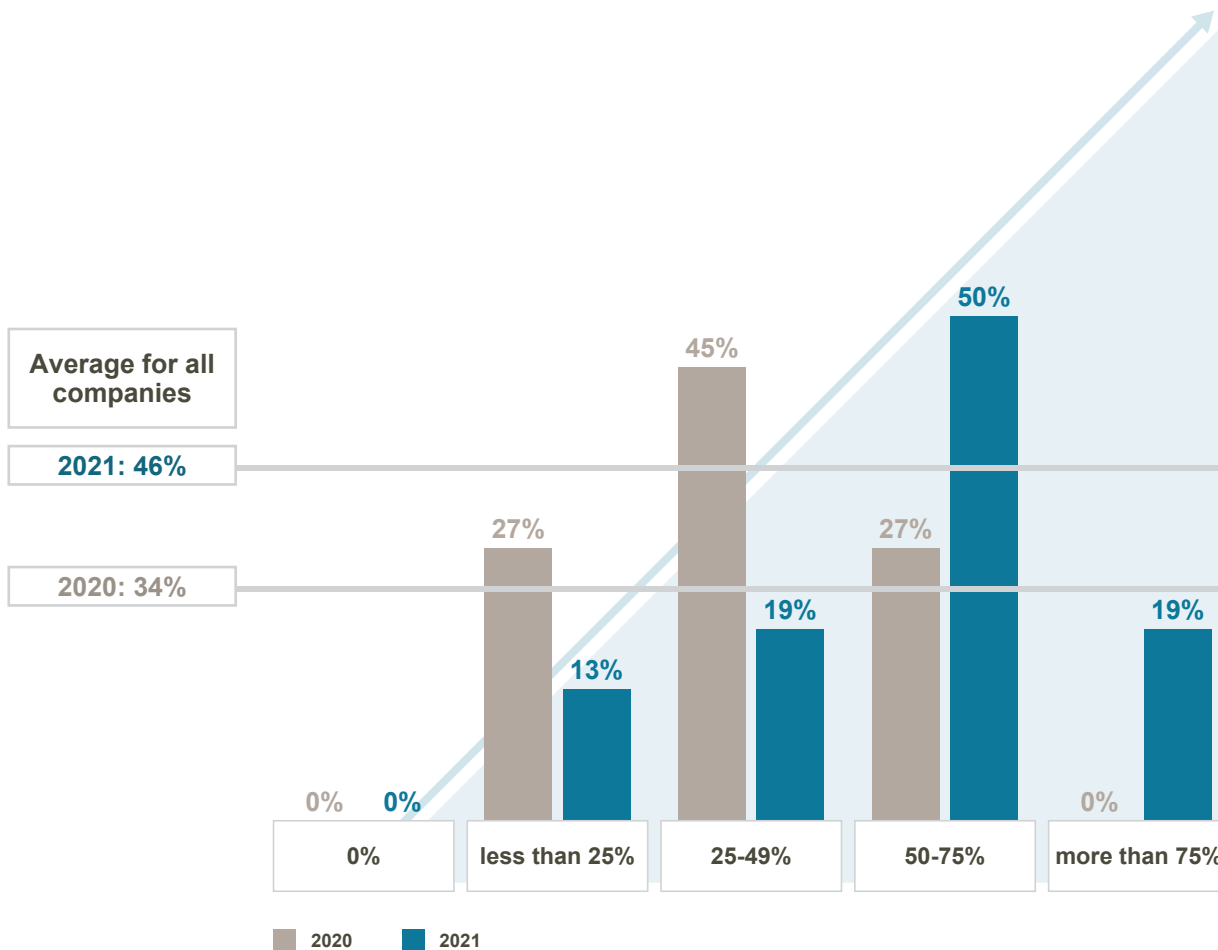
What do you believe would most help the “bounce back” of exhibitions?



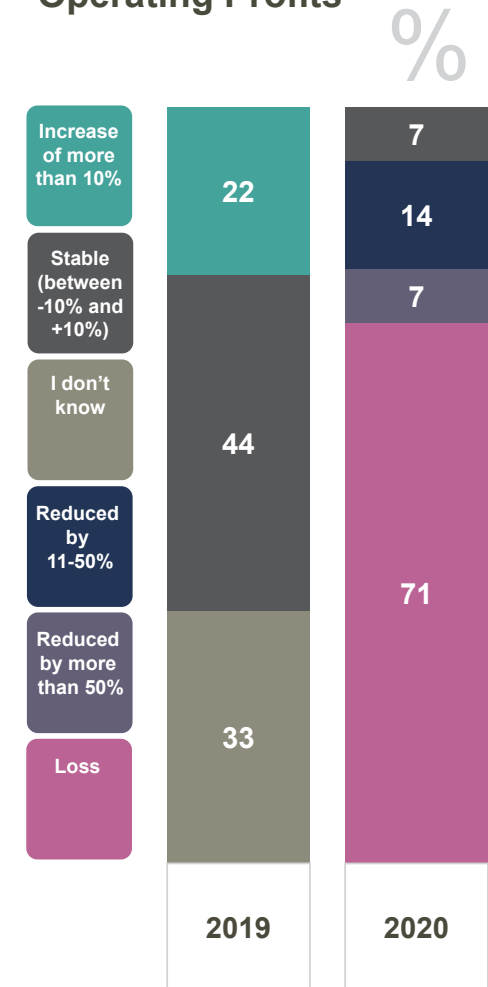
Detailed results for Spain



Revenue compared to 2019



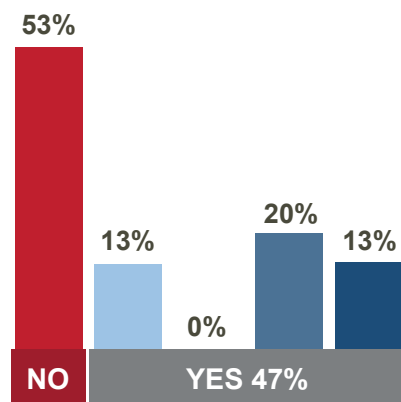
Operating Profits



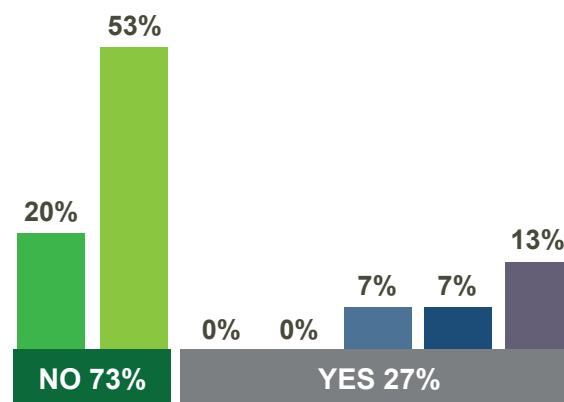
Detailed results for Spain



Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
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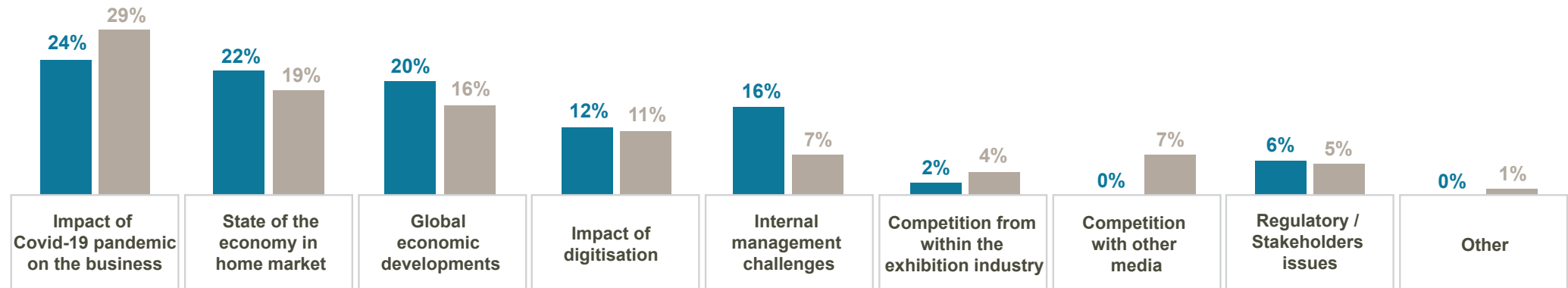
Detailed results for Spain



Most important business issues in the exhibition industry

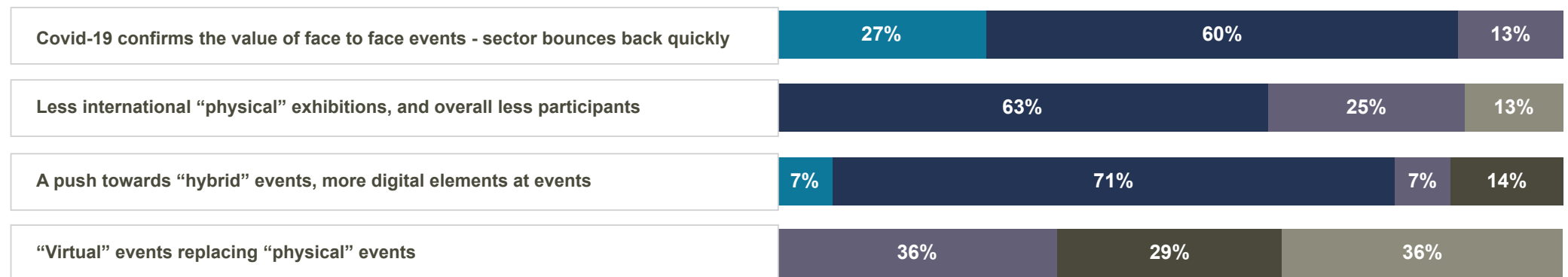
Spain

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

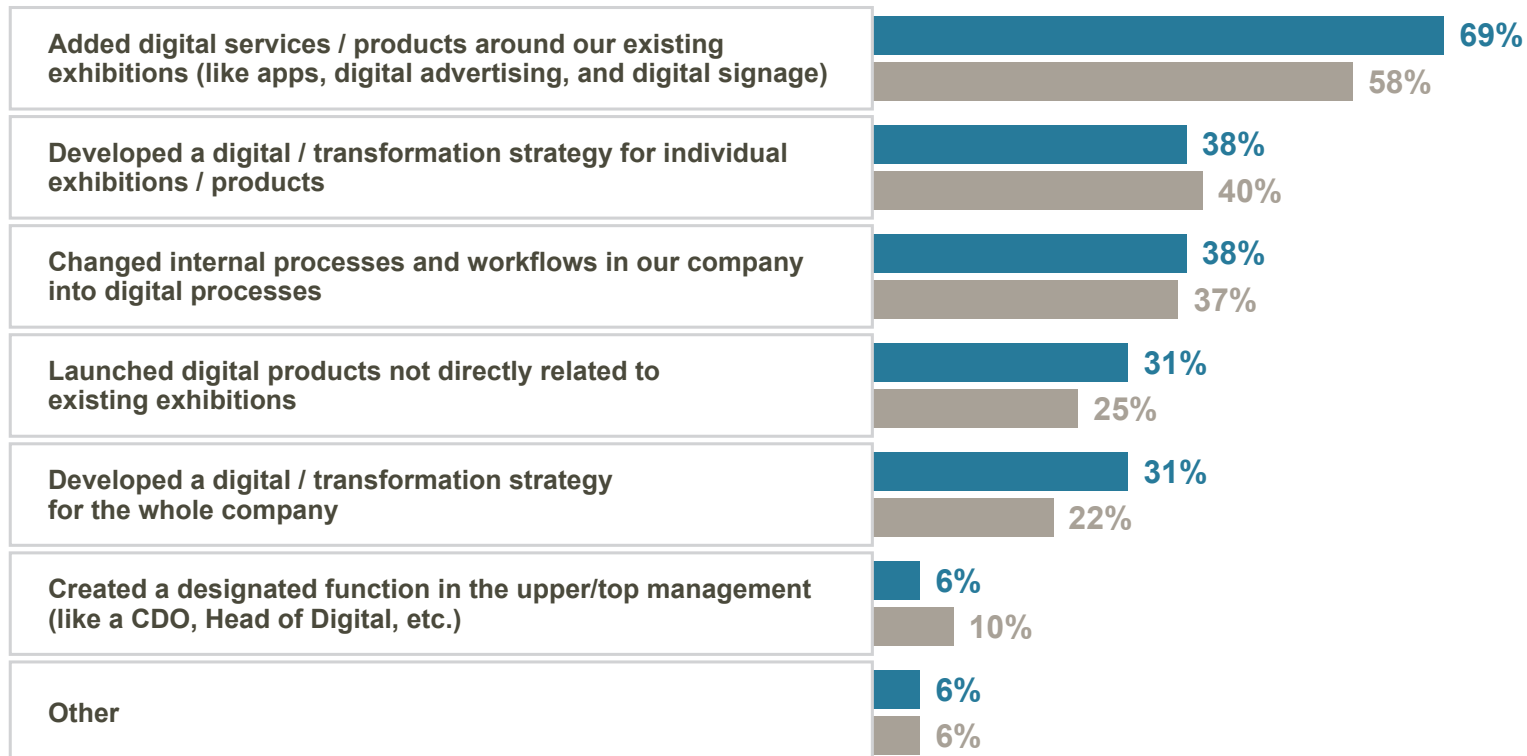




Spain

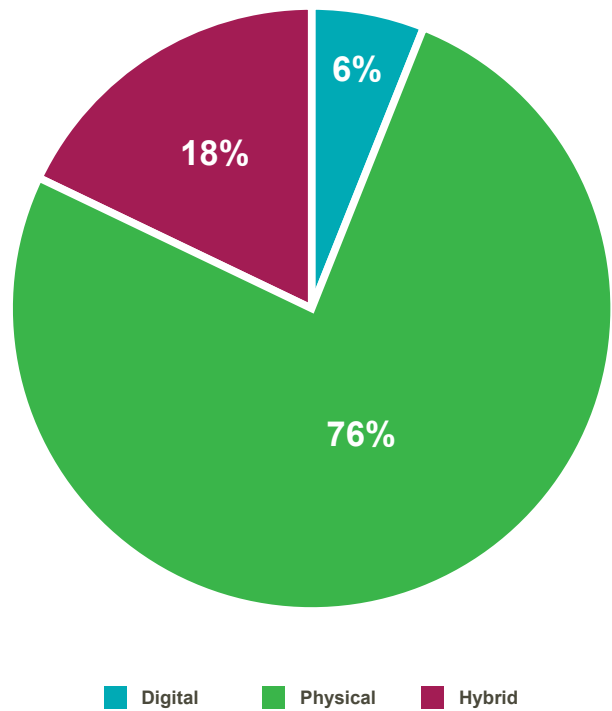
Global

Digitisation: implementation in Spain and globally

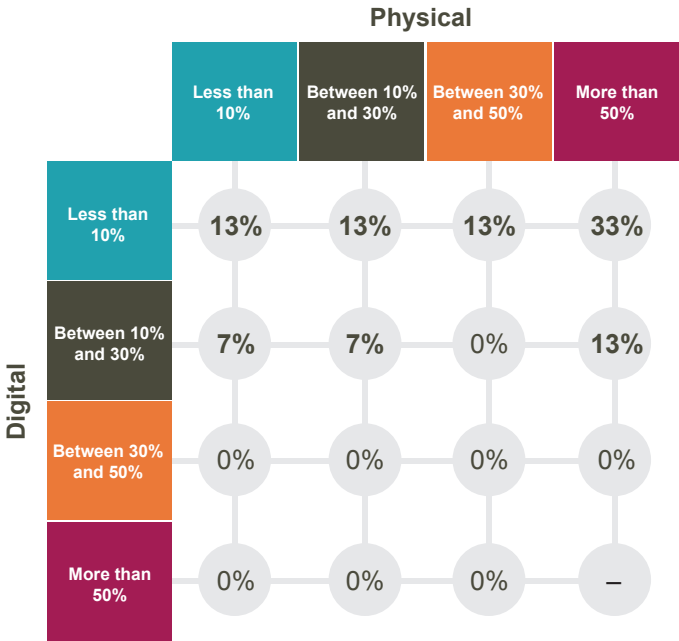




Number of fairs projected in 2021

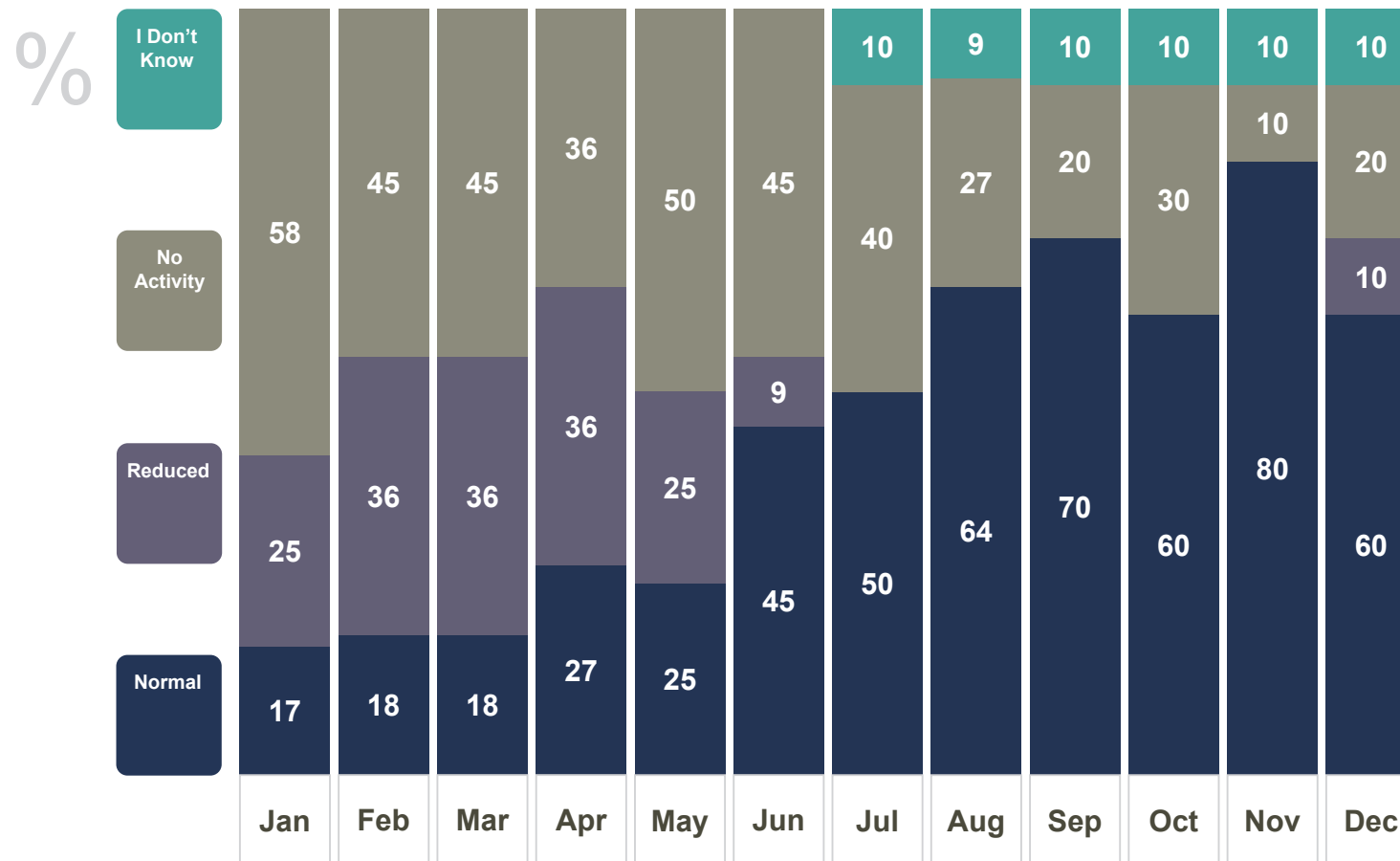


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



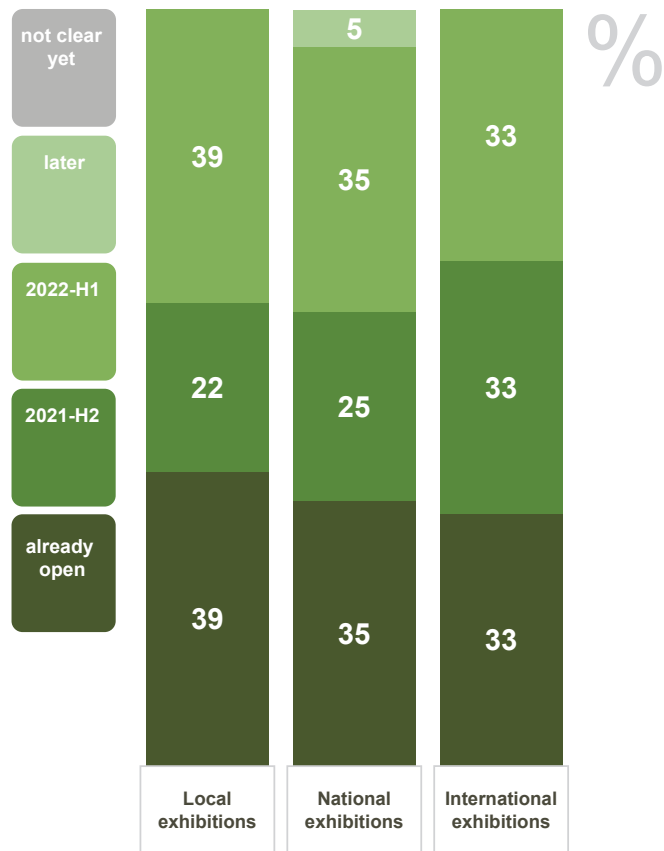


Situation of industry operations in 2021

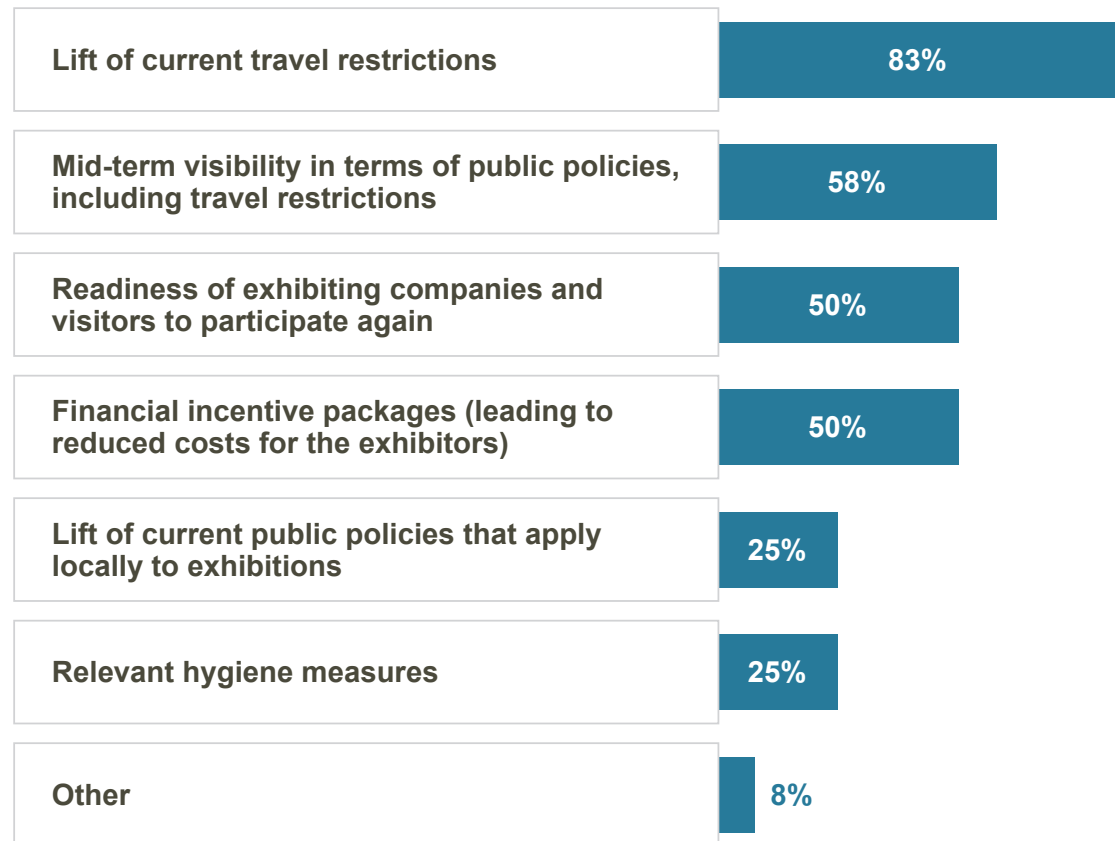




When do you believe exhibitions will open again in your city?

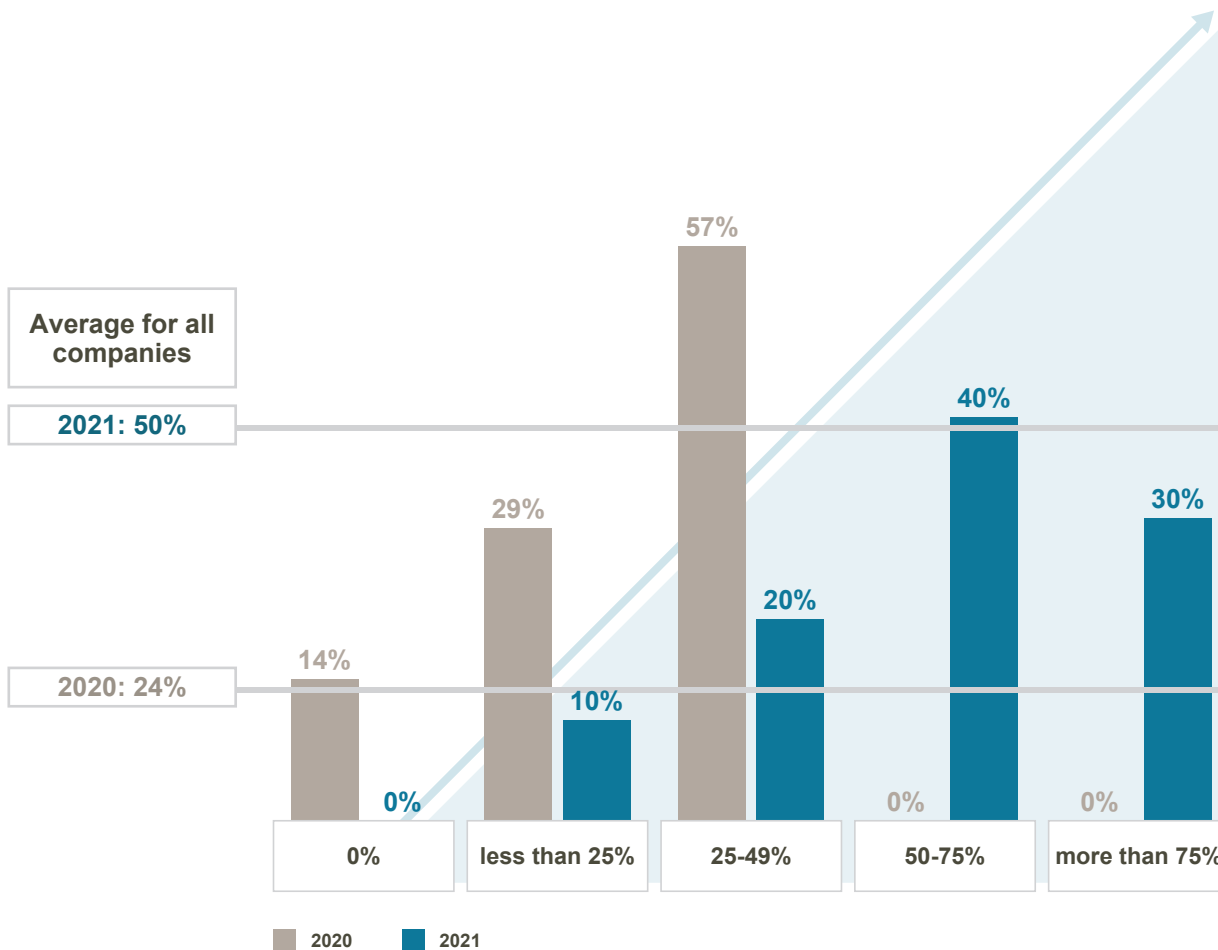


What do you believe would most help the “bounce back” of exhibitions?

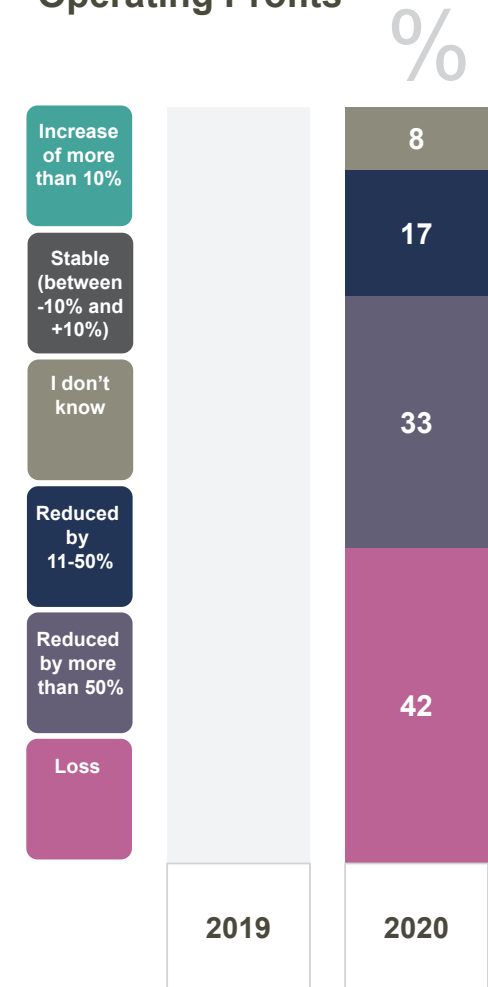




Revenue compared to 2019



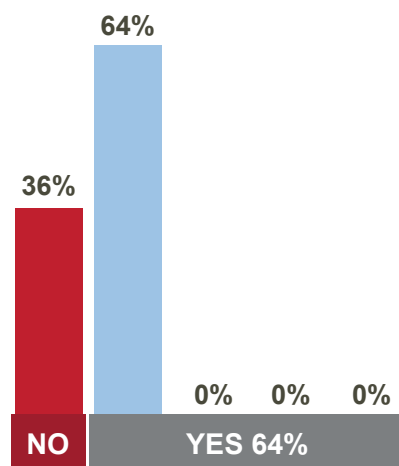
Operating Profits



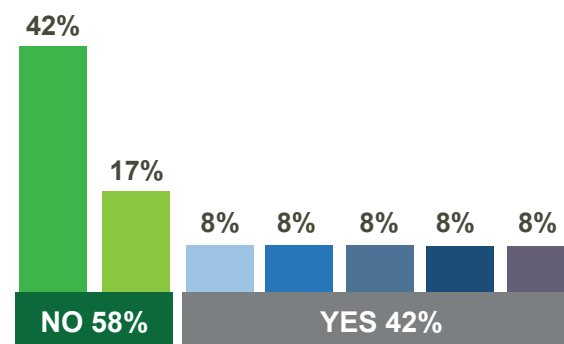
Detailed results for Turkey



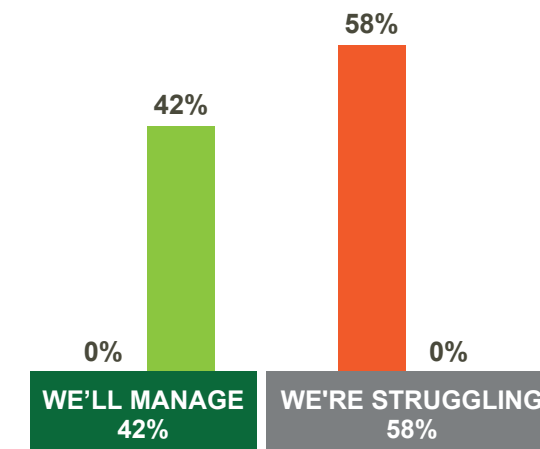
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Have you had to reduce your workforce?



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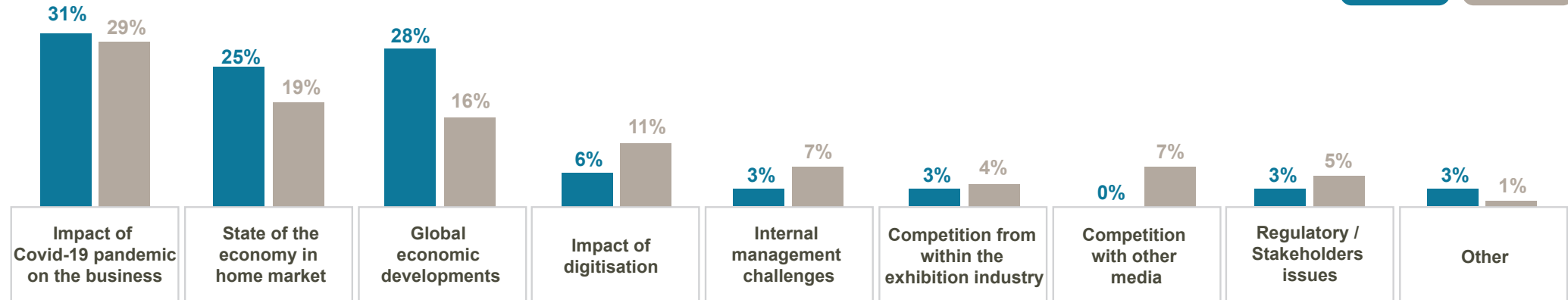
Detailed results for Turkey



Most important business issues in the exhibition industry

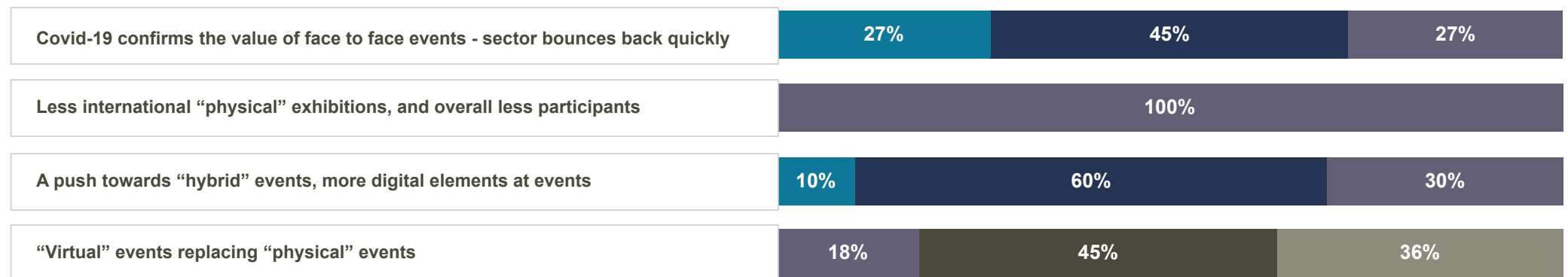
Turkey

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not





Turkey

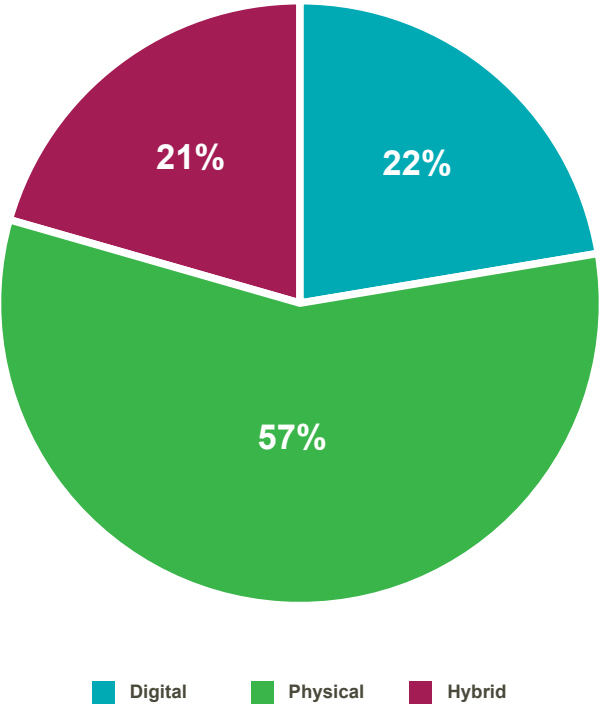
Global

Digitisation: implementation in Turkey and globally

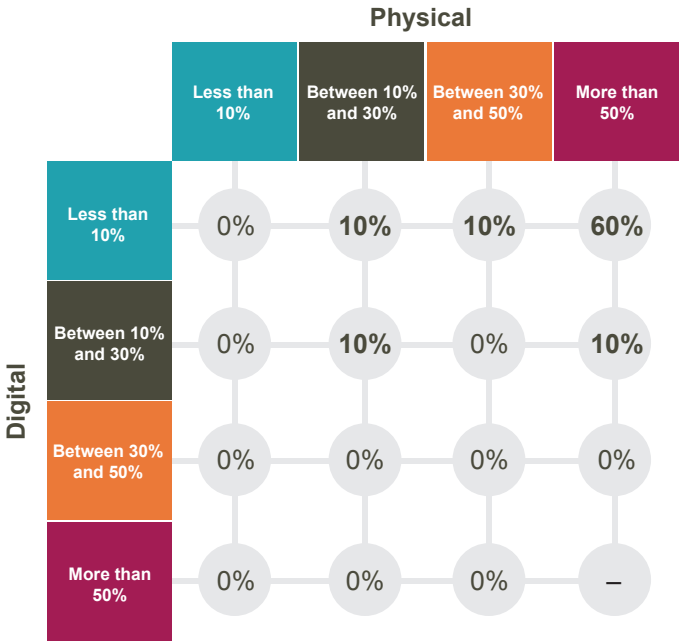




Number of fairs projected in 2021

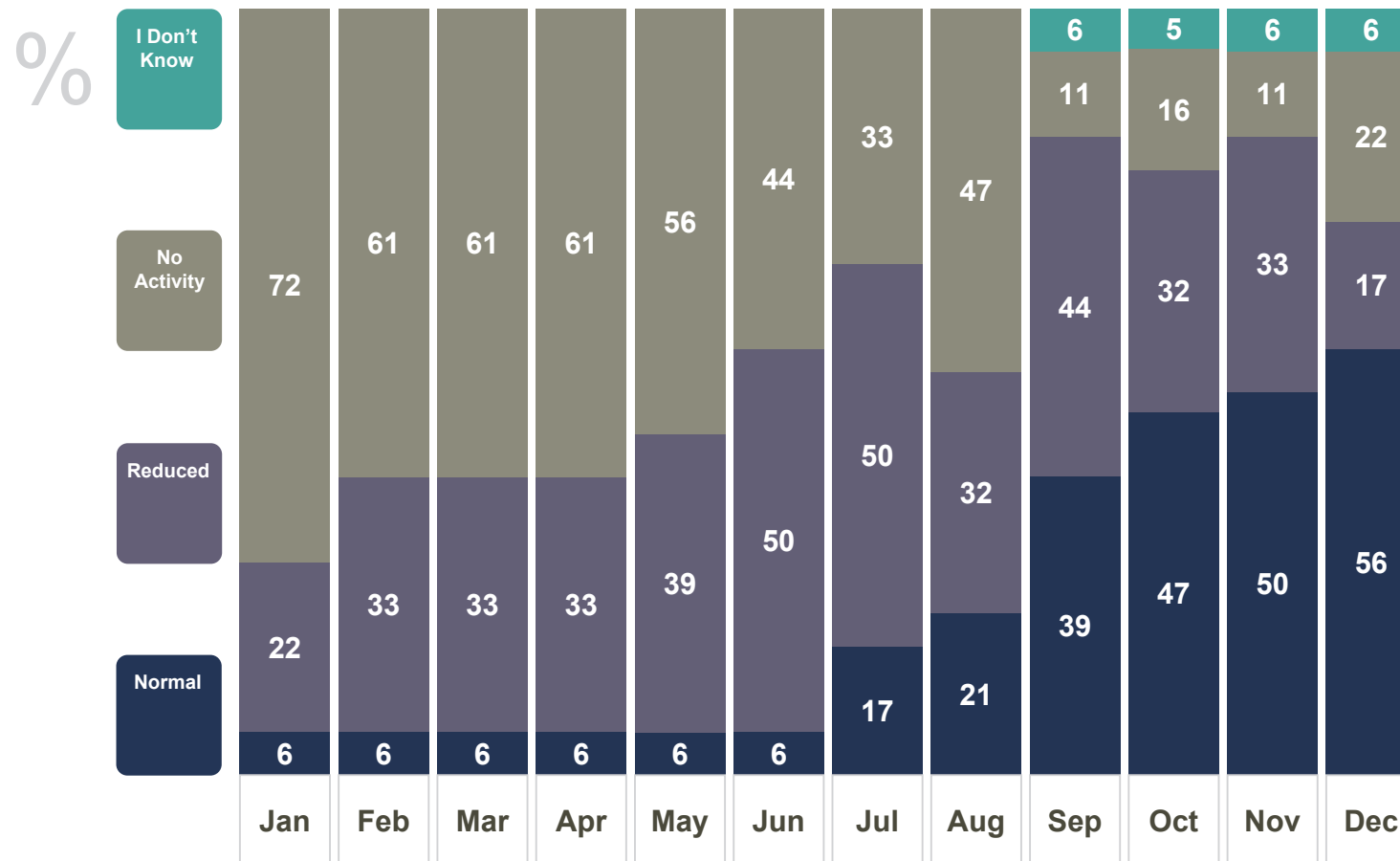


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



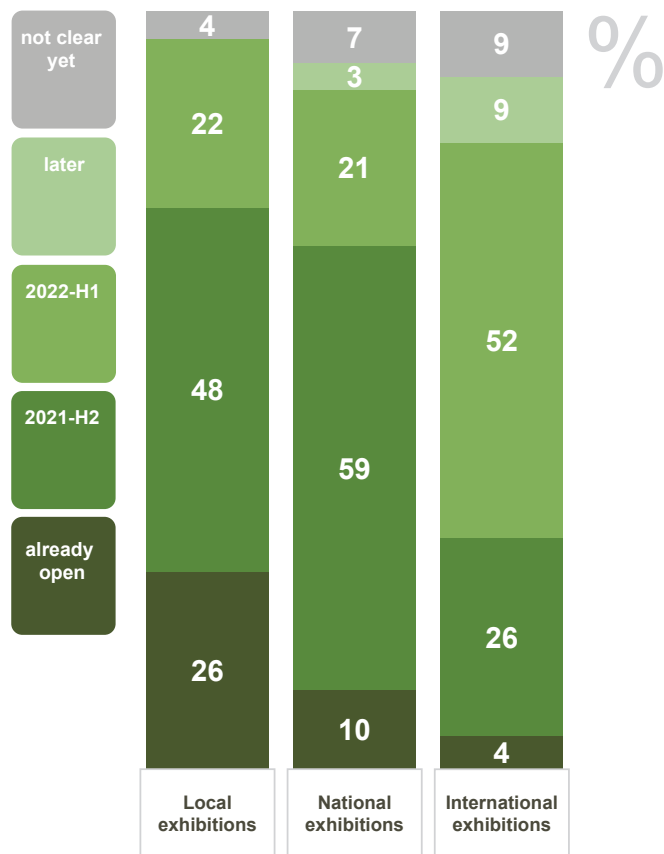


Situation of industry operations in 2021

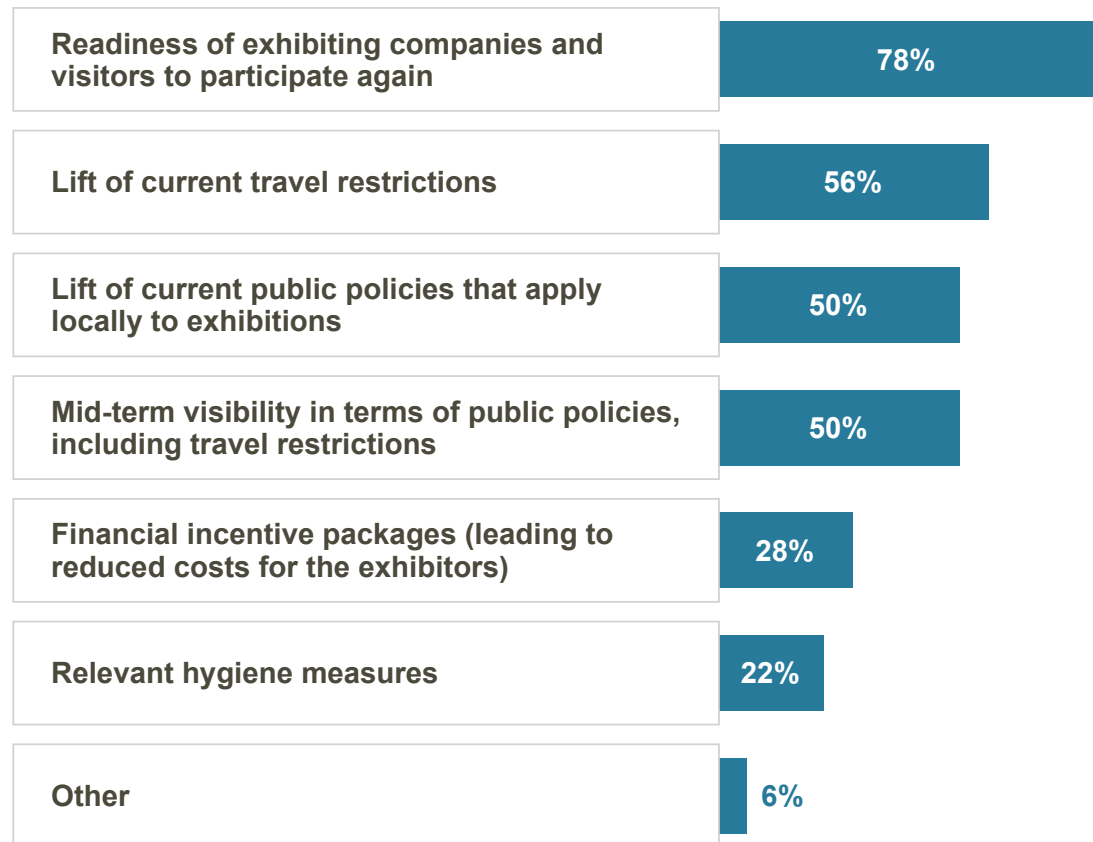




When do you believe exhibitions will open again in your city?

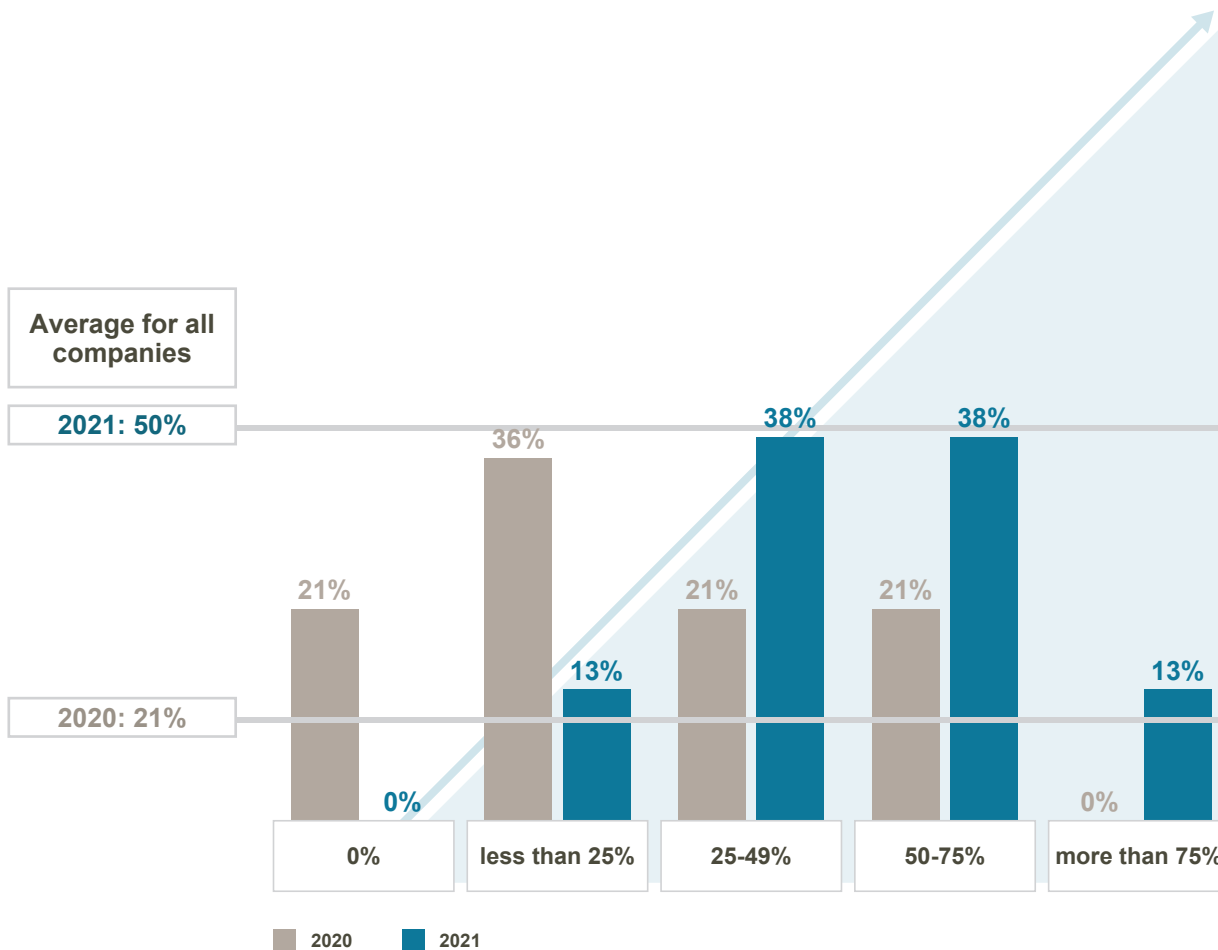


What do you believe would most help the “bounce back” of exhibitions?

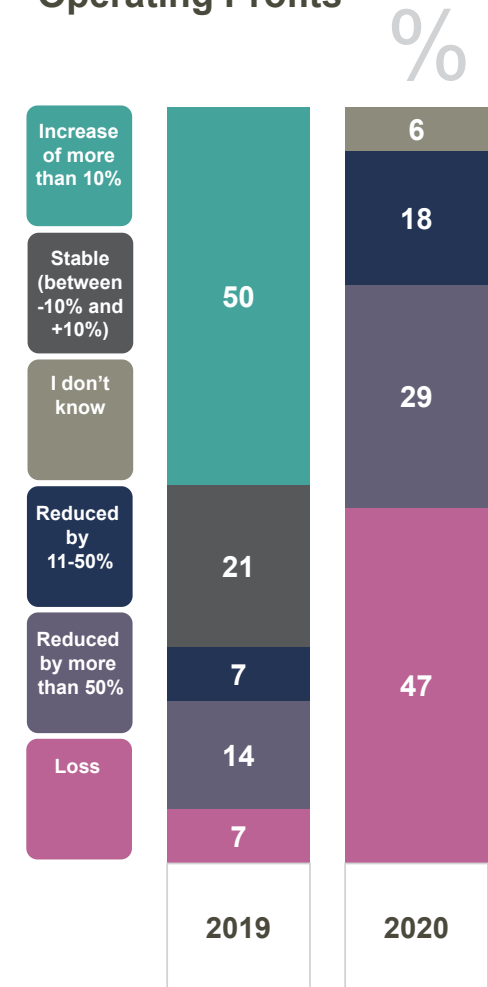




Revenue compared to 2019

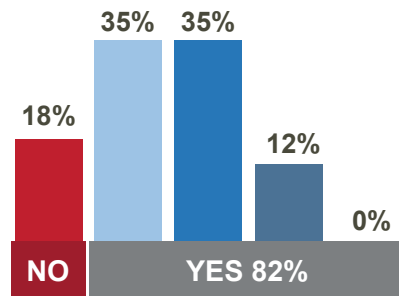


Operating Profits

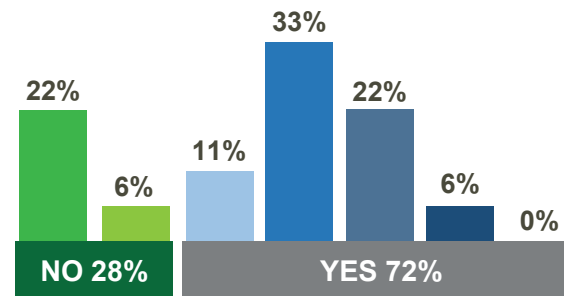




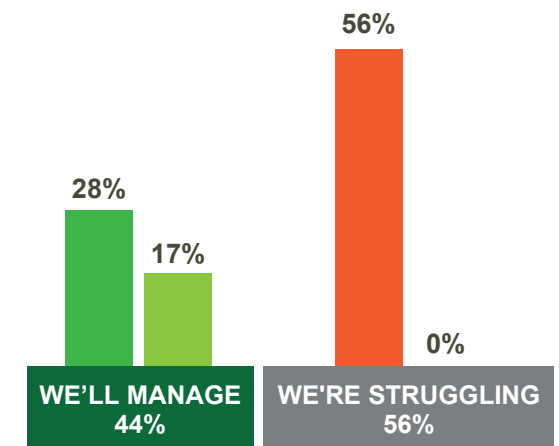
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
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- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
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- Yes, up to 10%
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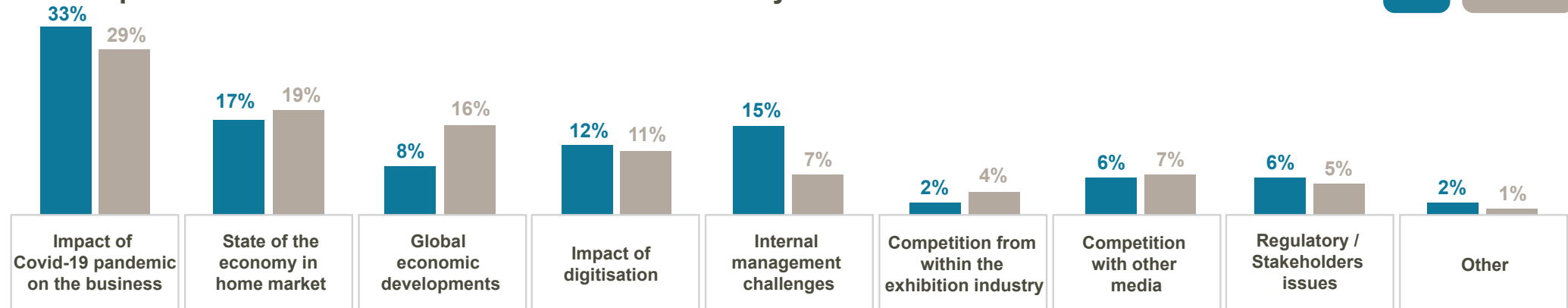
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Most important business issues in the exhibition industry

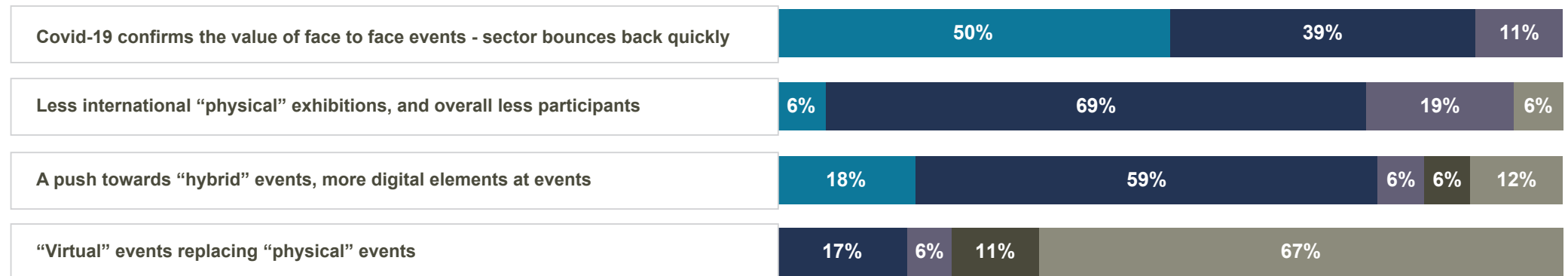
UK

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

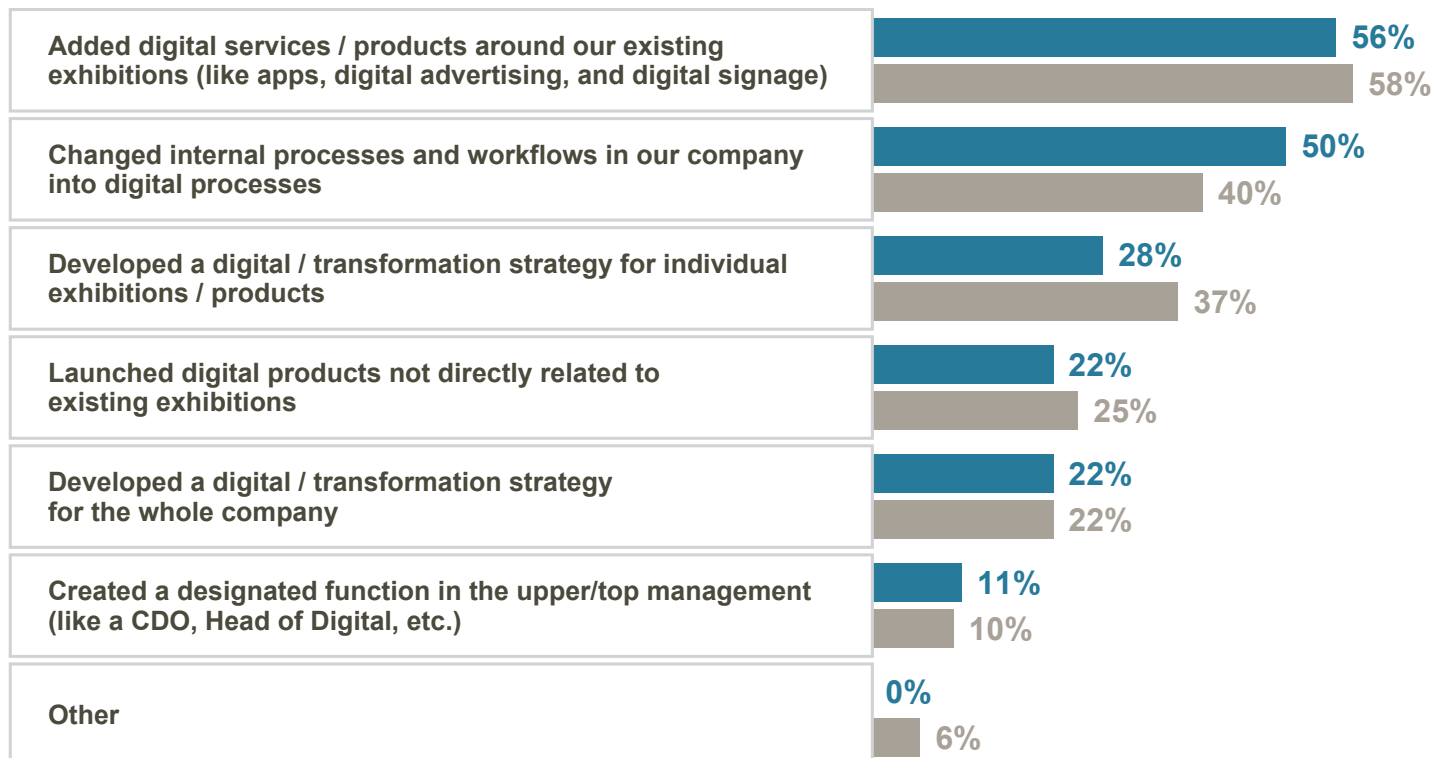




UK

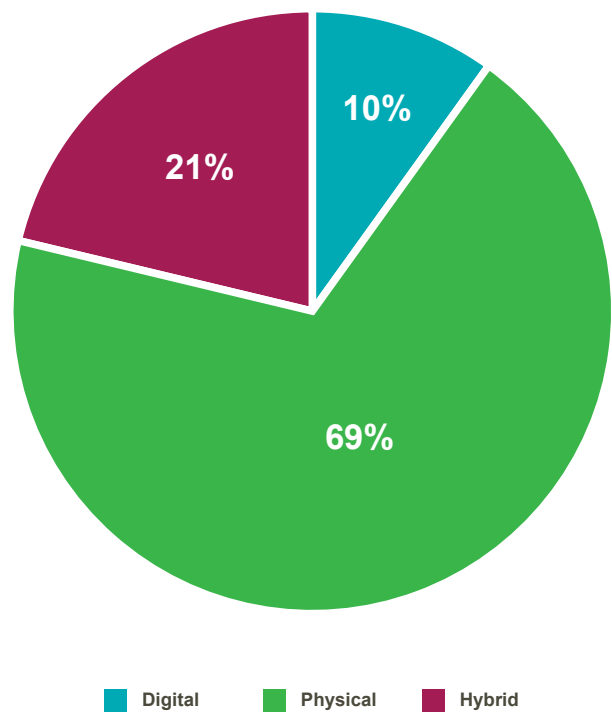
Global

Digitisation: implementation in UK and globally

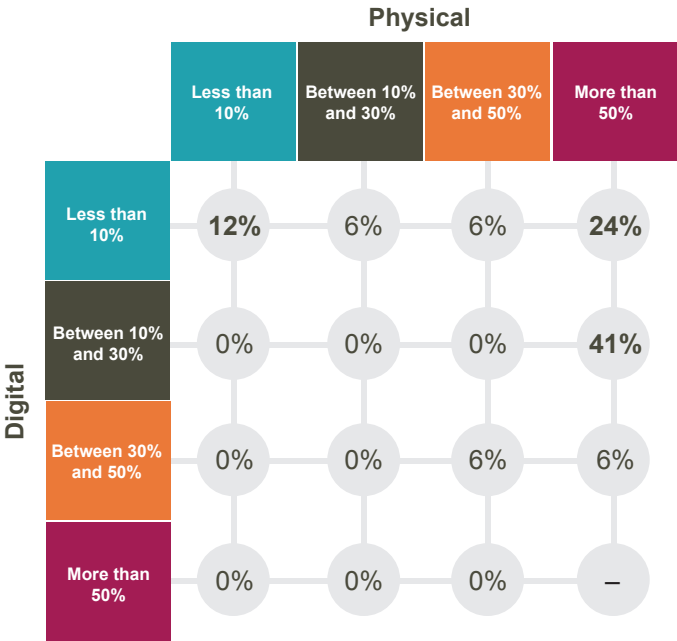




Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



Middle East & Africa



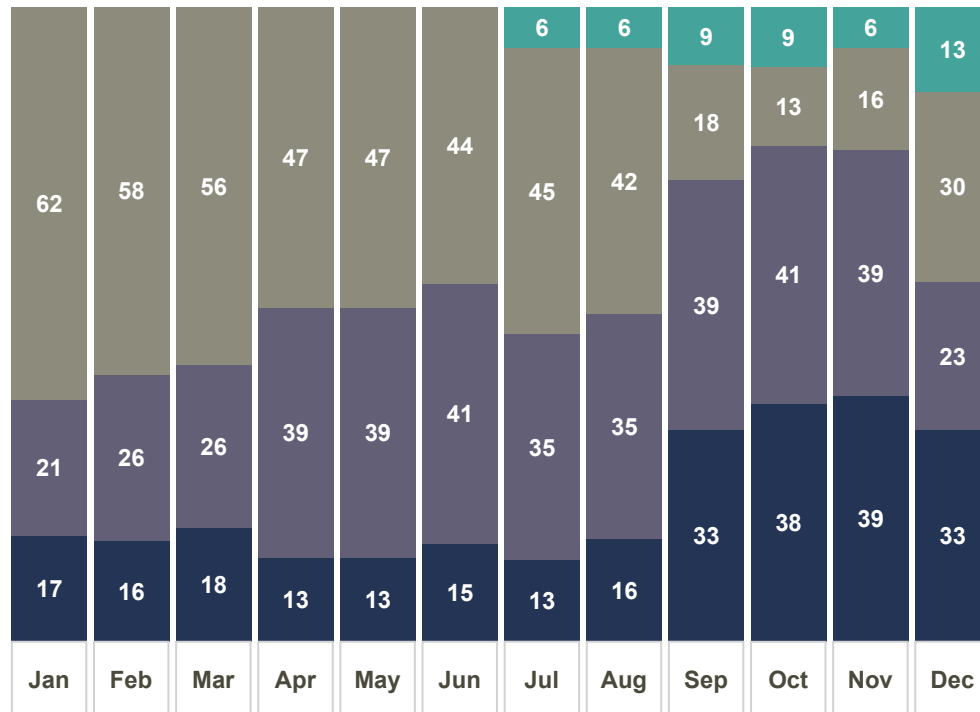
Operations - Reopening Exhibitions Middle East & Africa



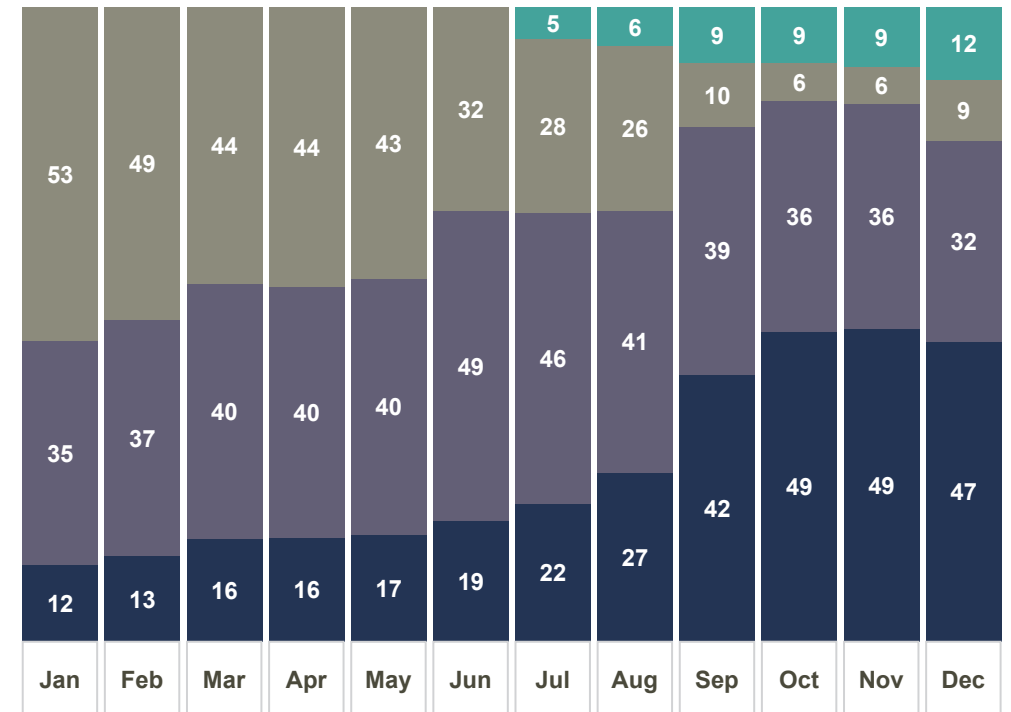
Situation of industry operations in 2021



Middle East & Africa



World

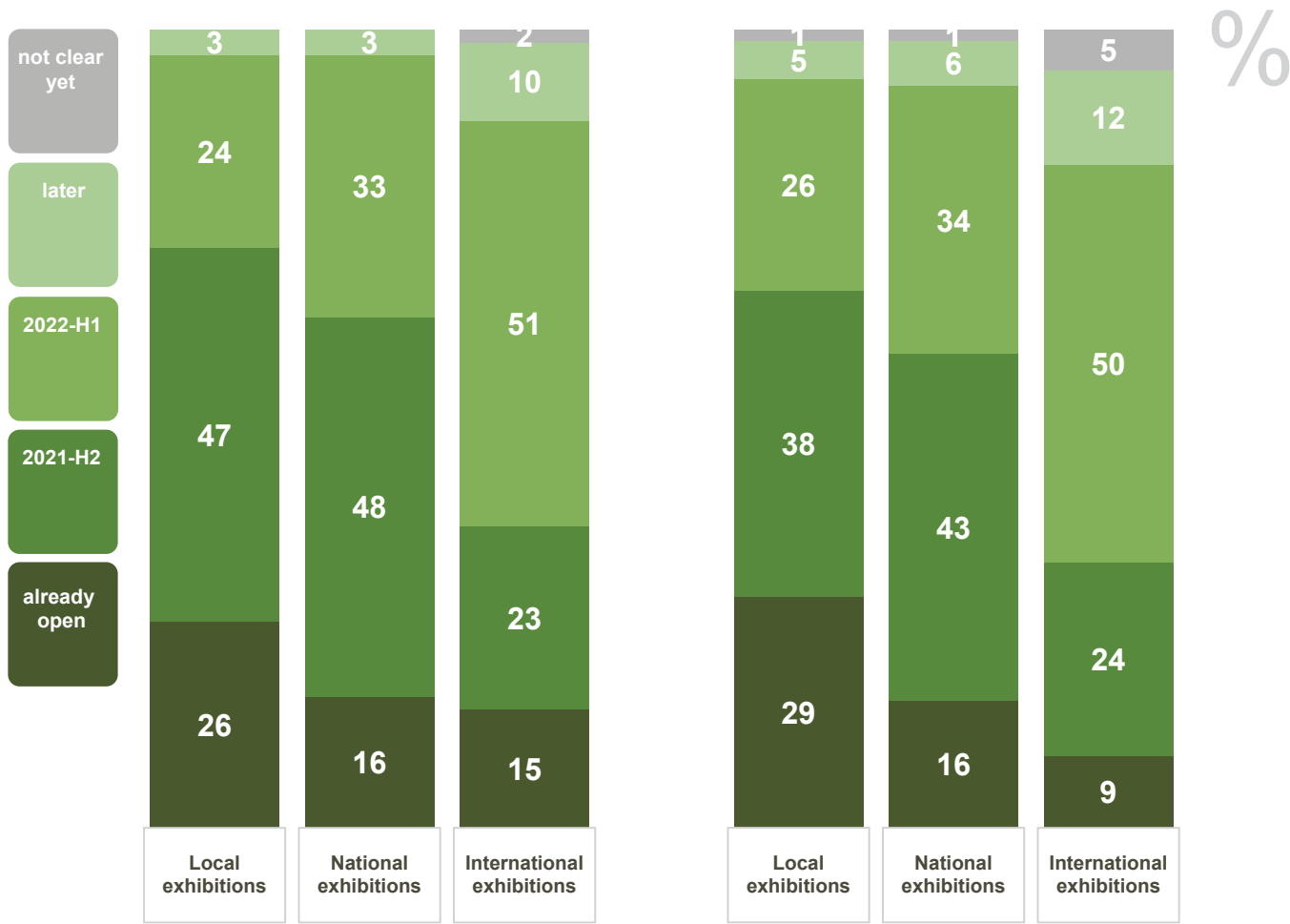




When do you believe
exhibitions will open
again in your city?

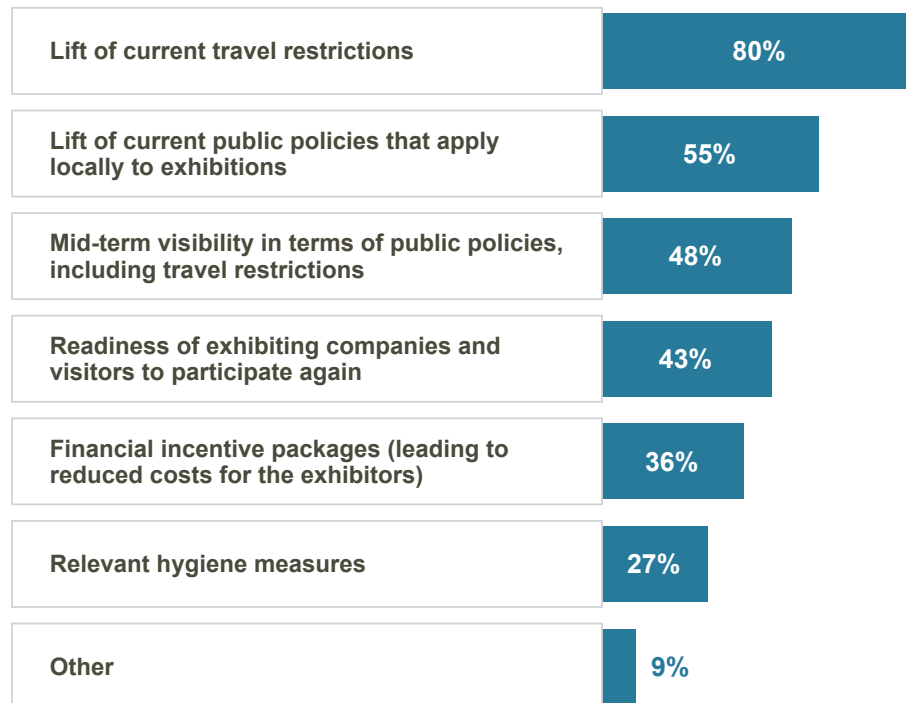
Middle East & Africa

World

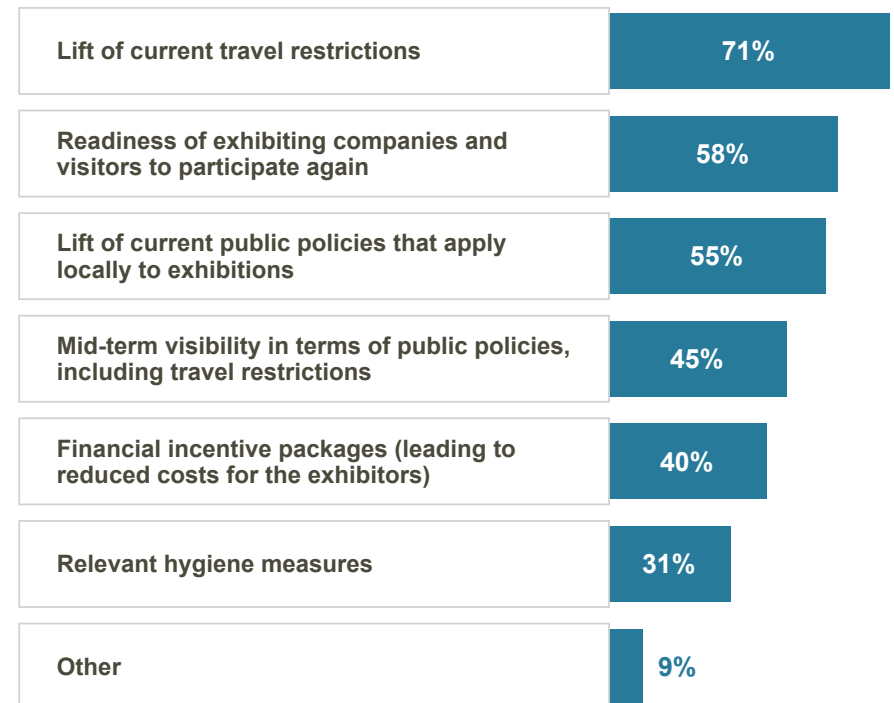


What do you believe would most help the “bounce back” of exhibitions?

Middle East & Africa

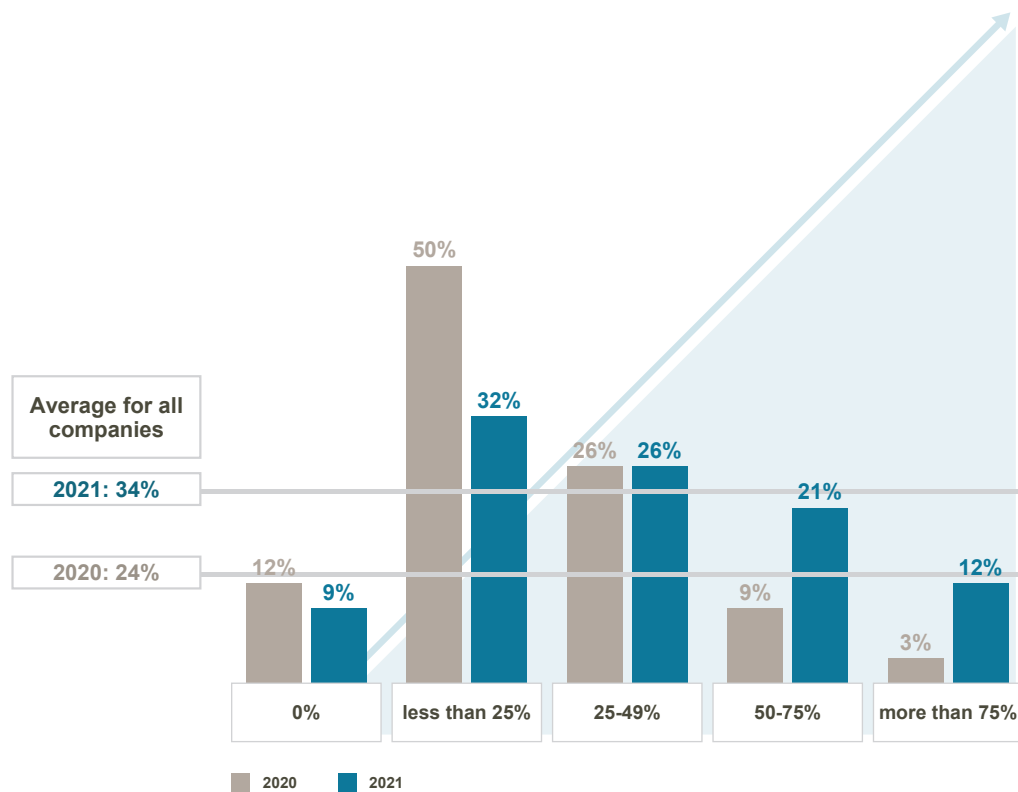


World

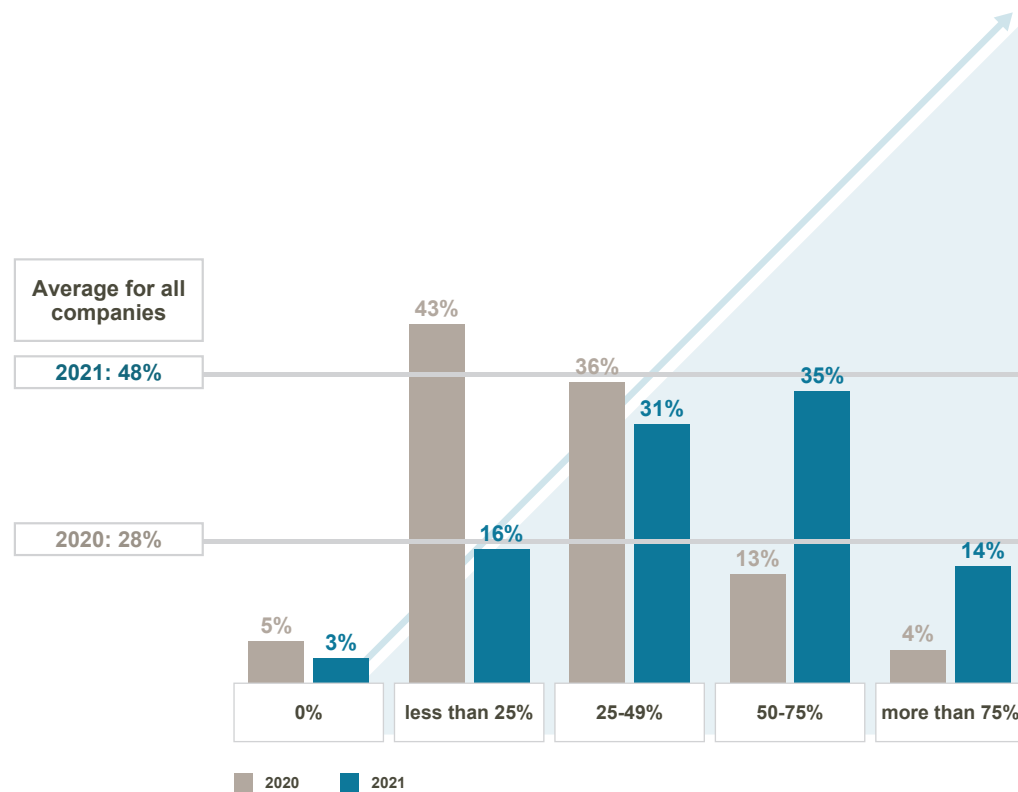


Revenue compared to 2019

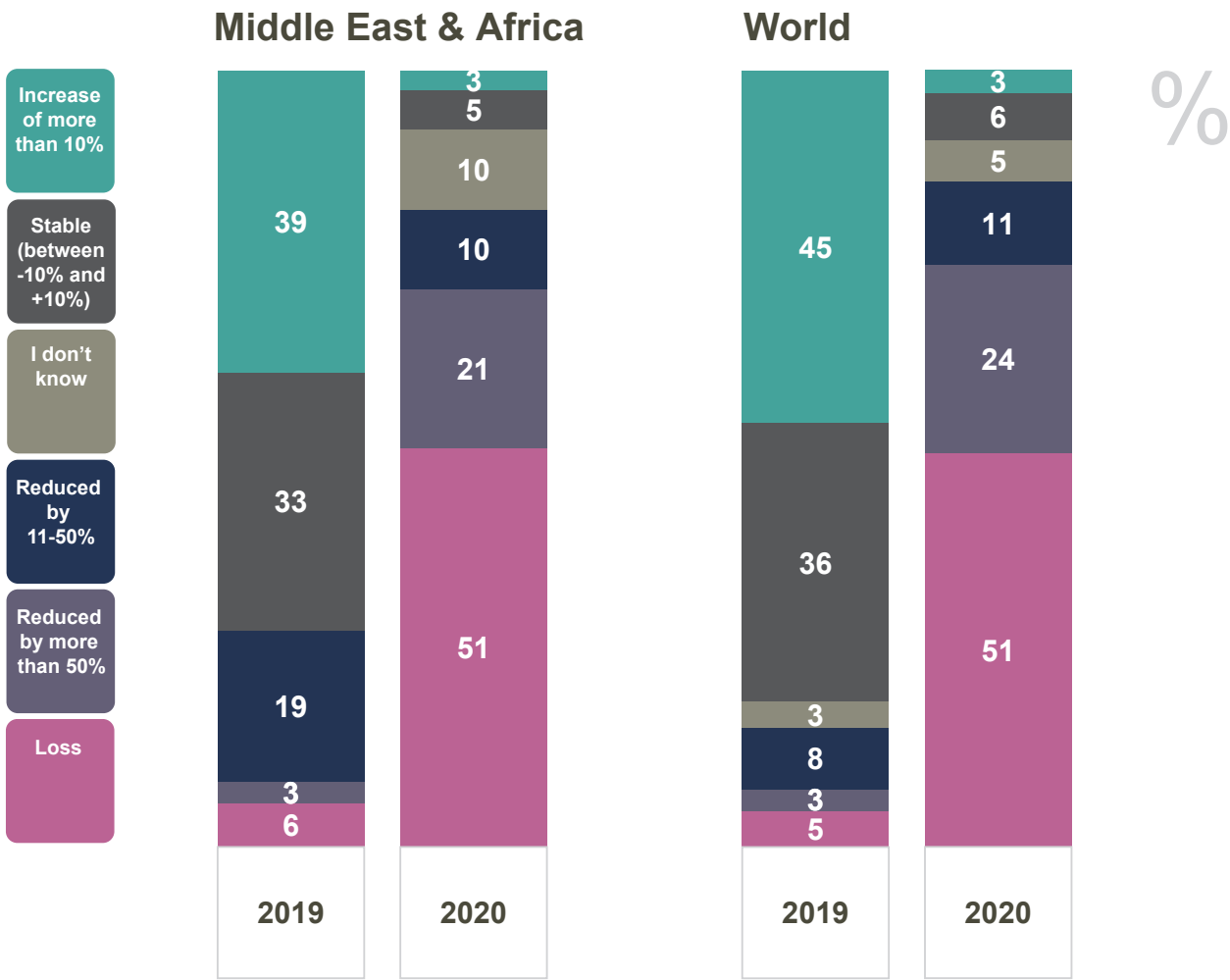
Middle East & Africa



World



Operating profits Middle East & Africa

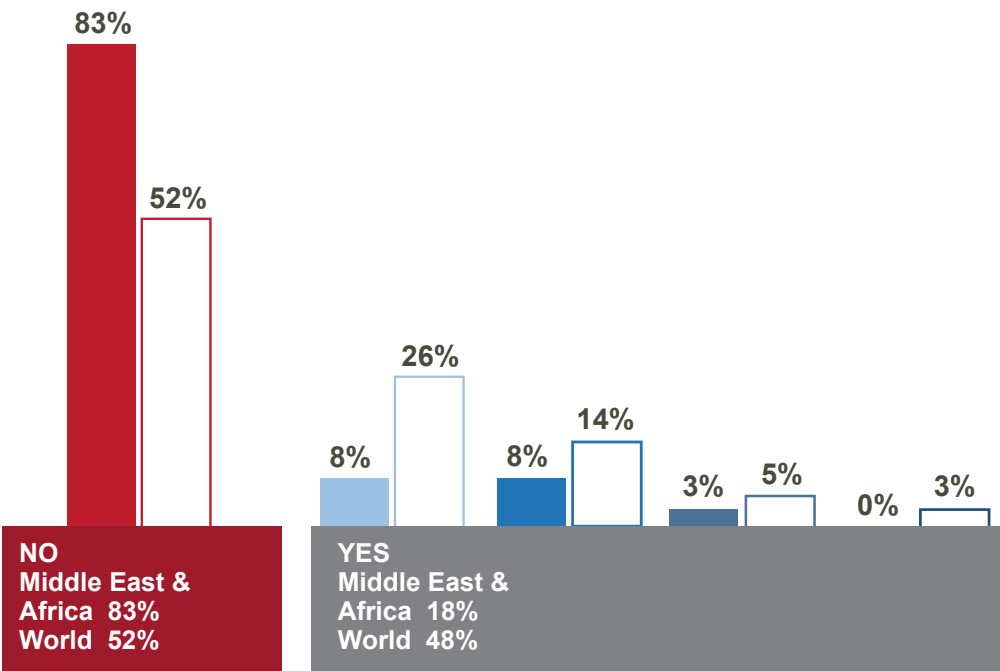


Did your company benefit from public financial support?

Middle East & Africa

World

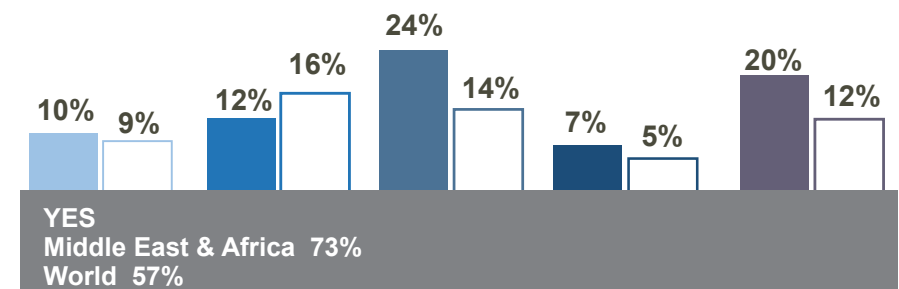
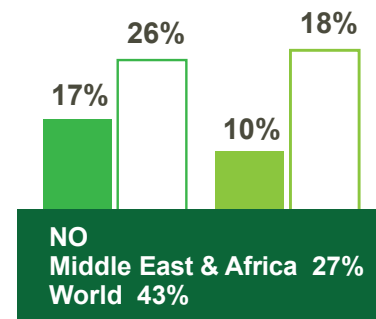
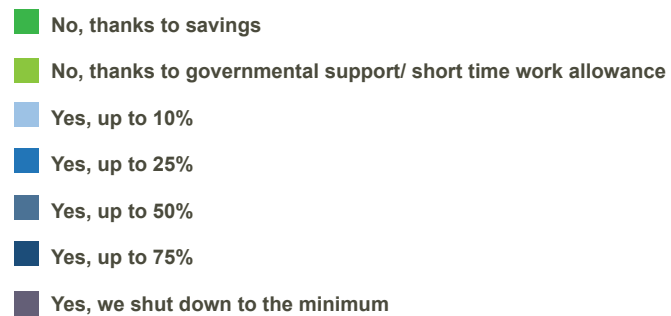
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Have you had to reduce your workforce?

Middle East & Africa

World

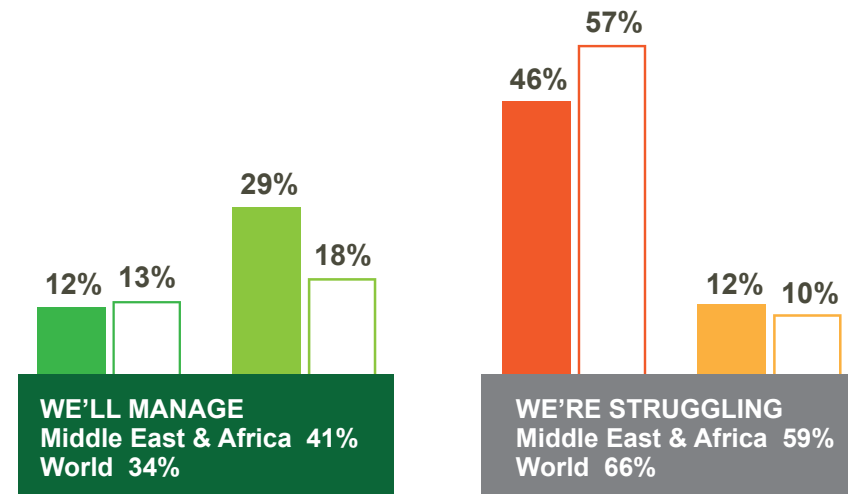


If there is no business for the next 6 months,
which best applies?

Middle East & Africa

World

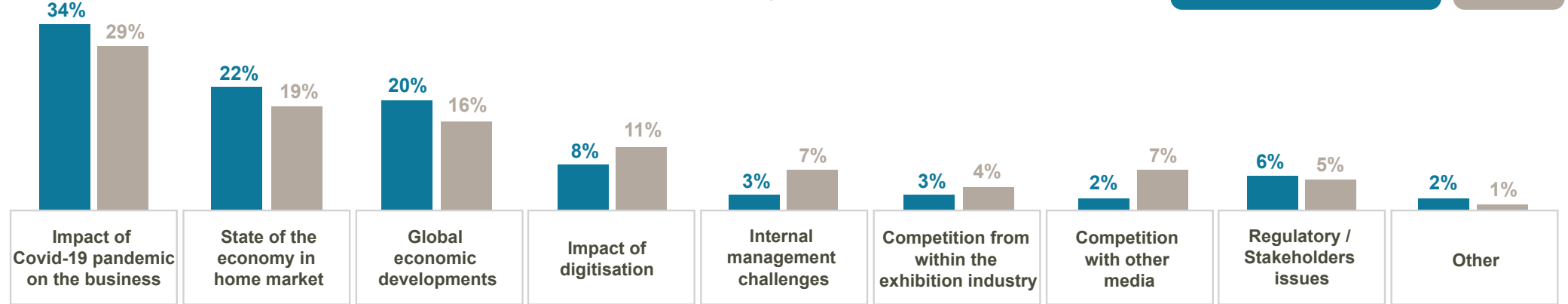
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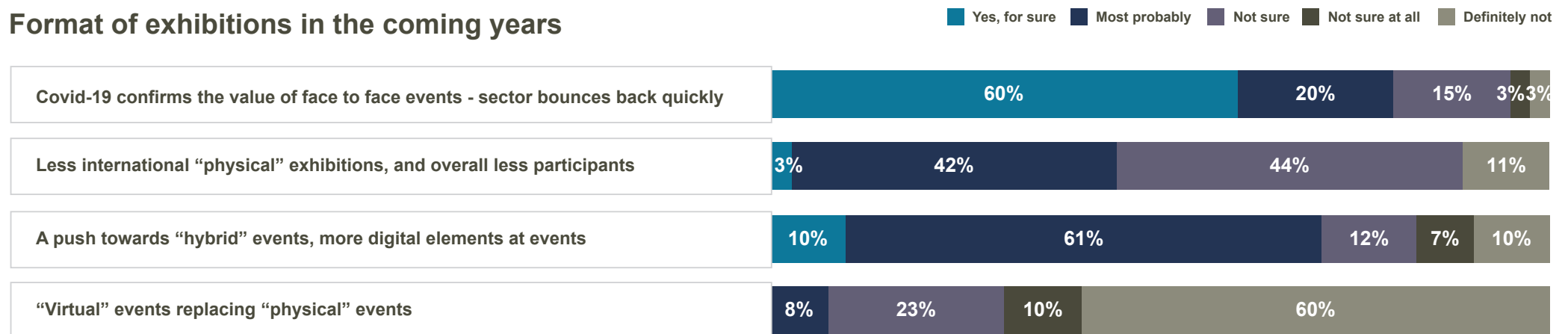
Most Important Business Issues - Format of Exhibitions - Middle East & Africa



Most important business issues in the exhibition industry



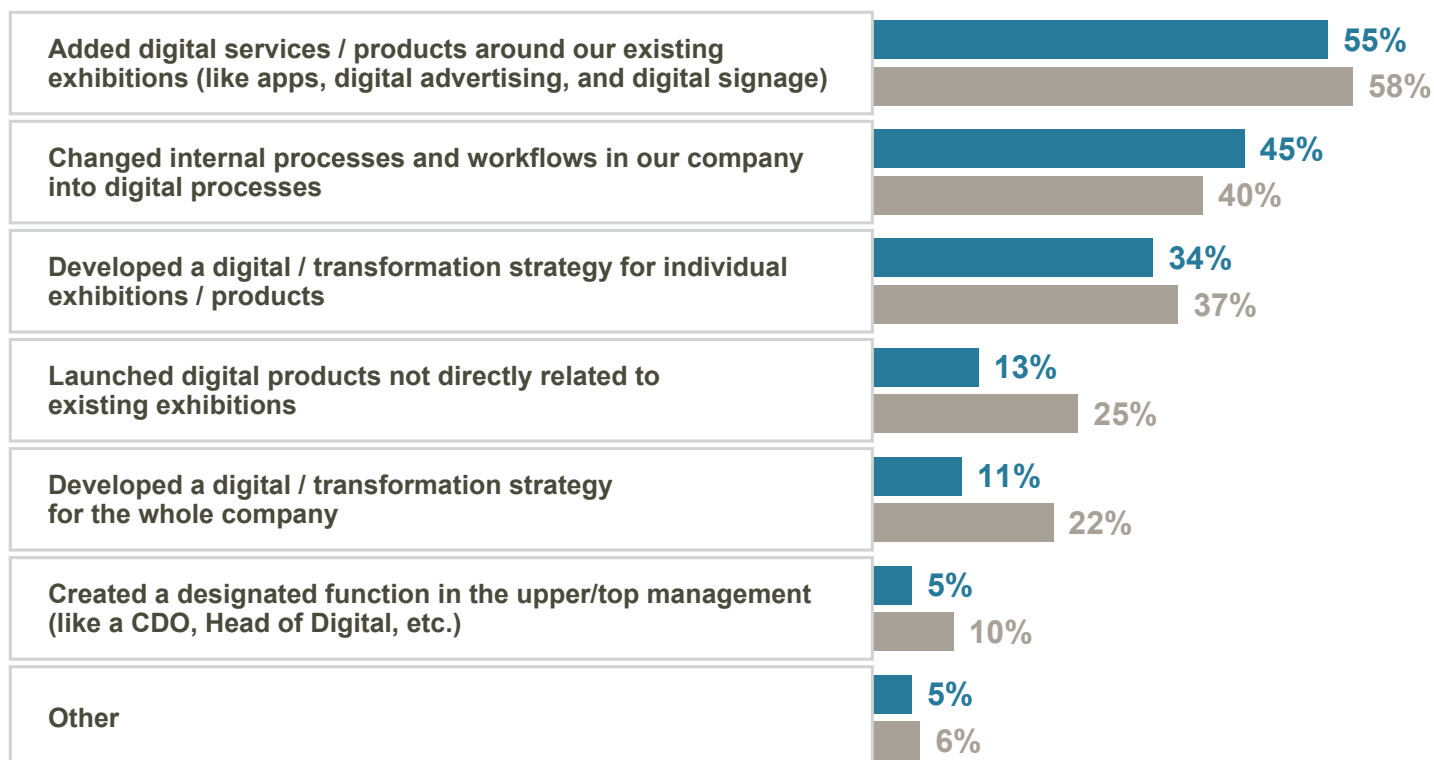
Format of exhibitions in the coming years



Middle East & Africa

Global

Digitisation: implementation in Middle East & Africa and globally

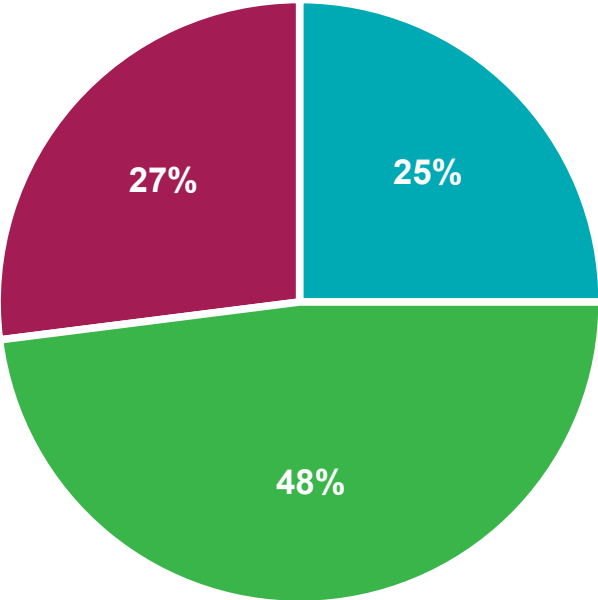


Number of fairs projected in 2021

Middle East & Africa

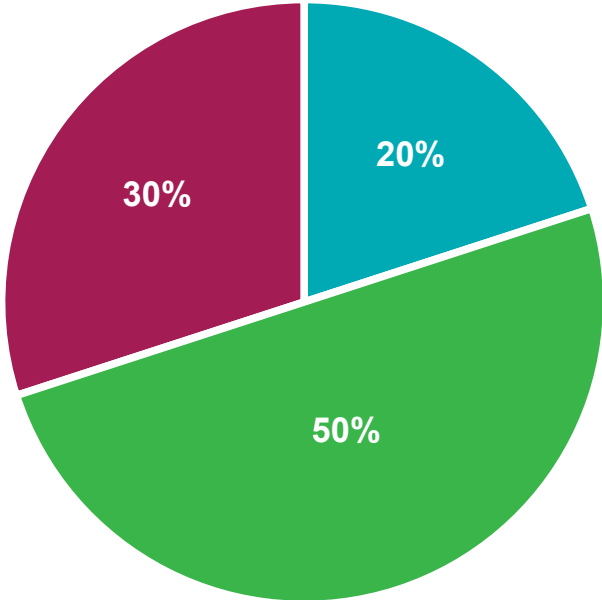


Middle East & Africa



Digital Physical Hybrid

World

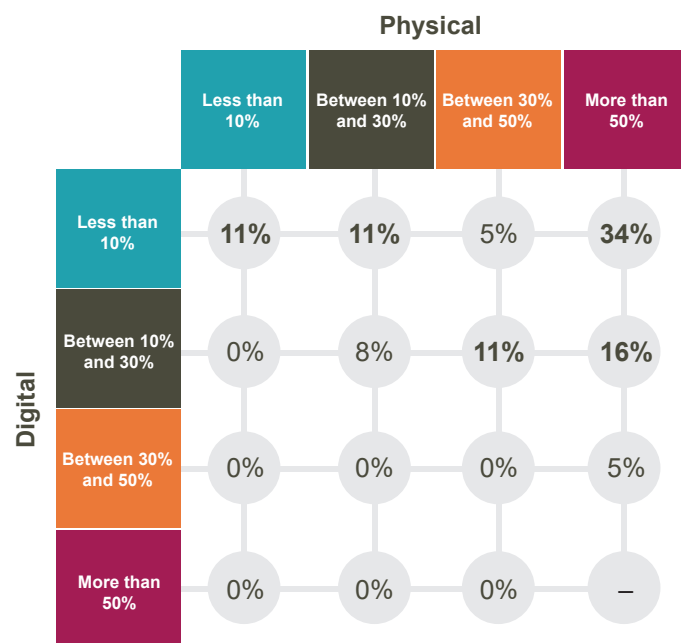


Digital Physical Hybrid

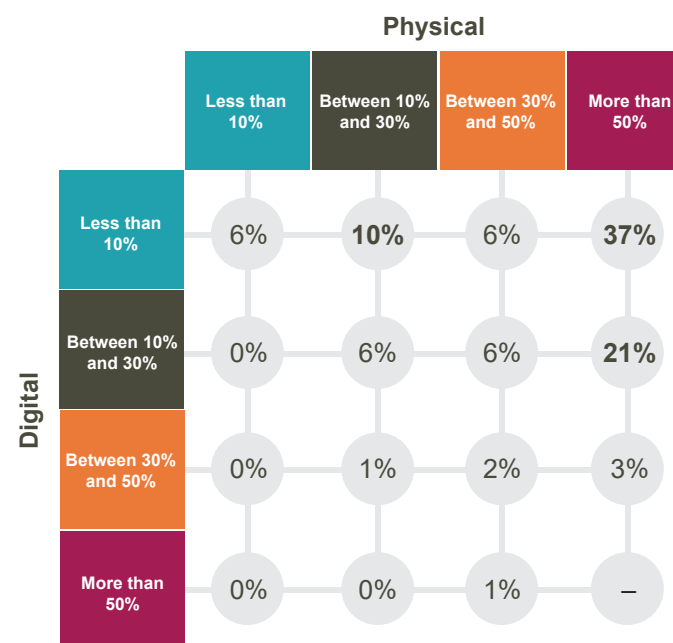
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



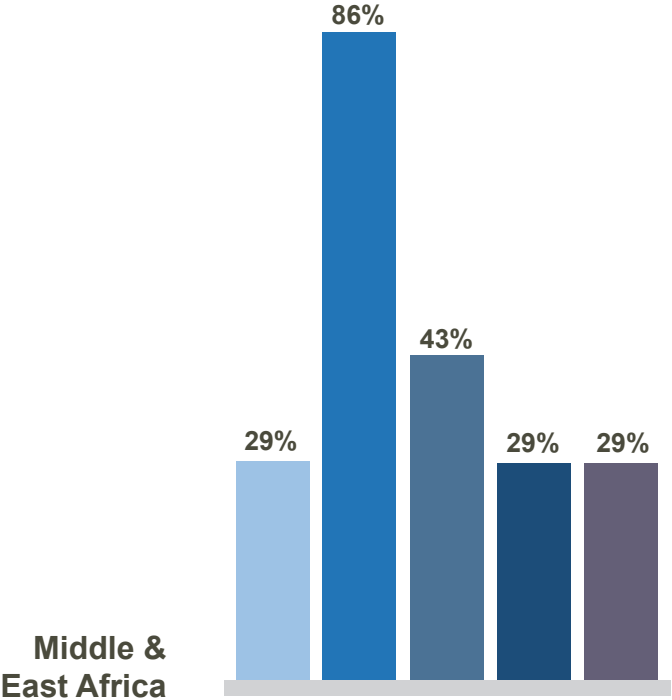
Middle East & Africa



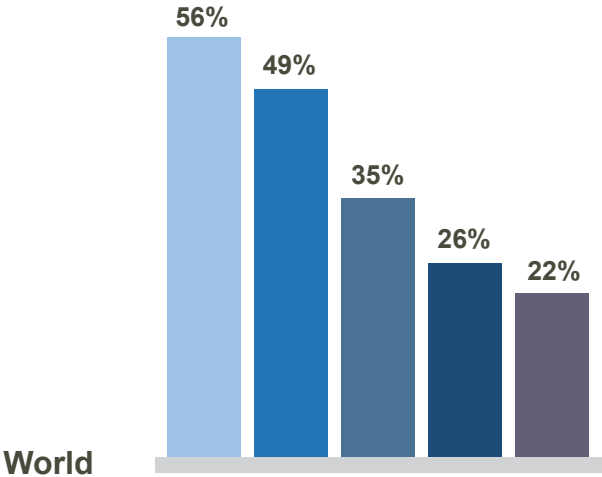
World



Expanded activities (for venues only) Middle East & Africa



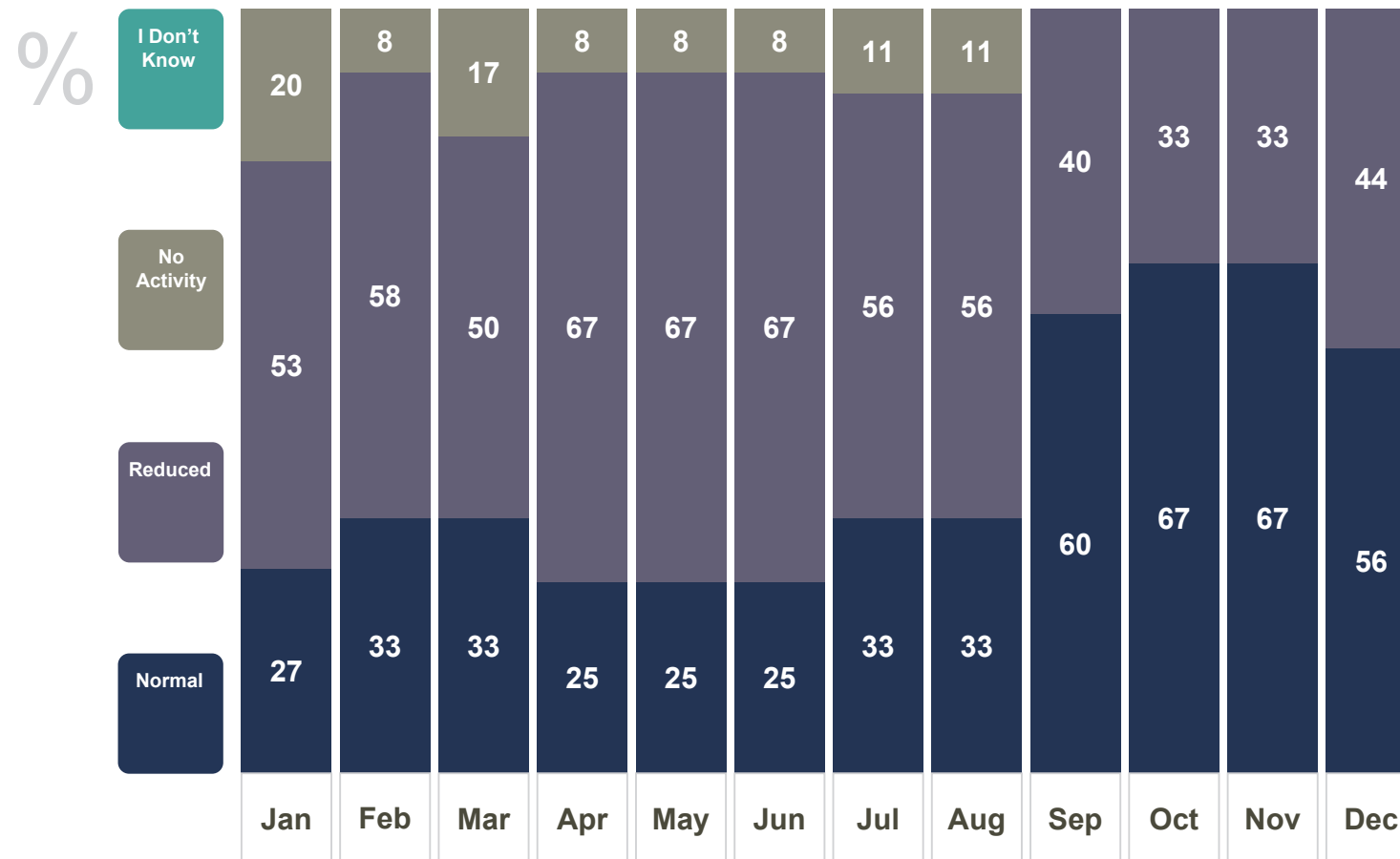
- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital



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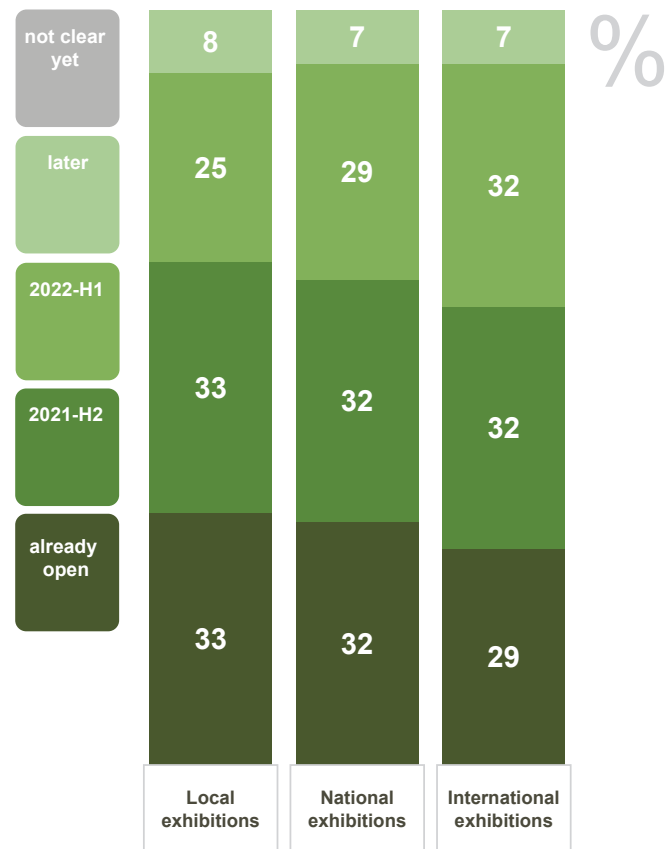


Situation of industry operations in 2021

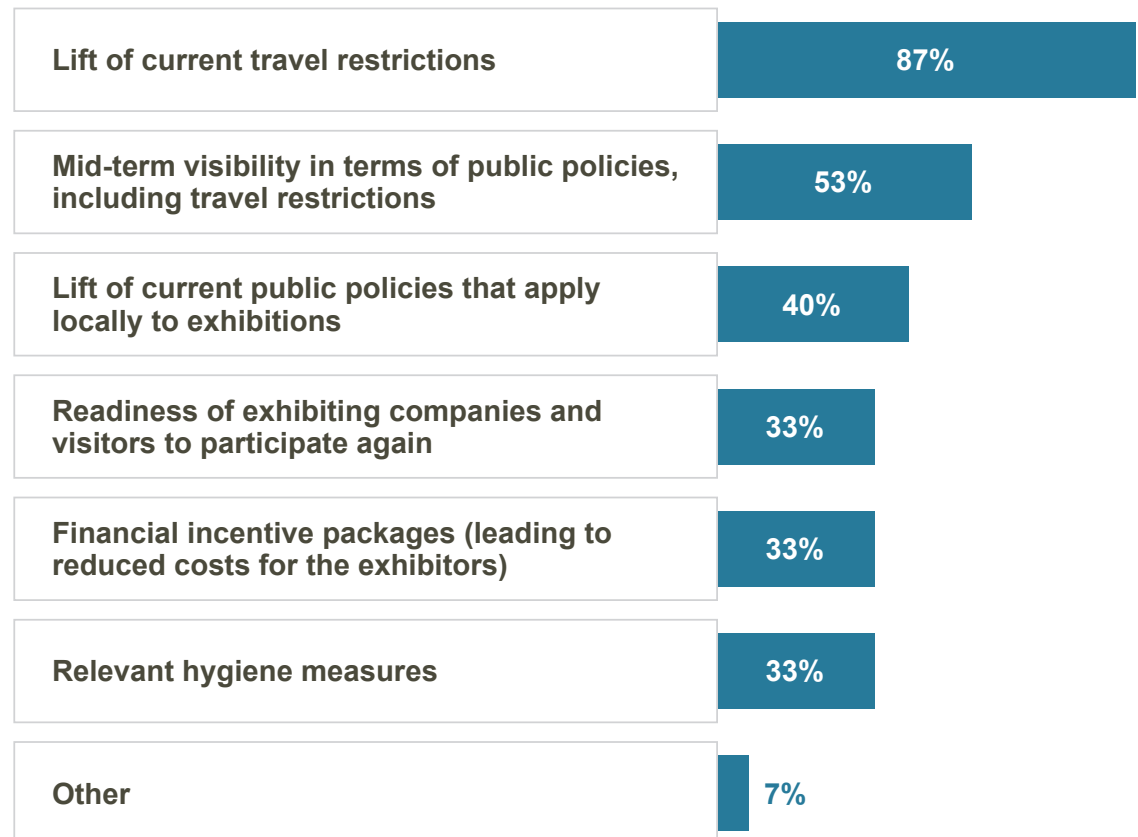




When do you believe exhibitions will open again in your city?



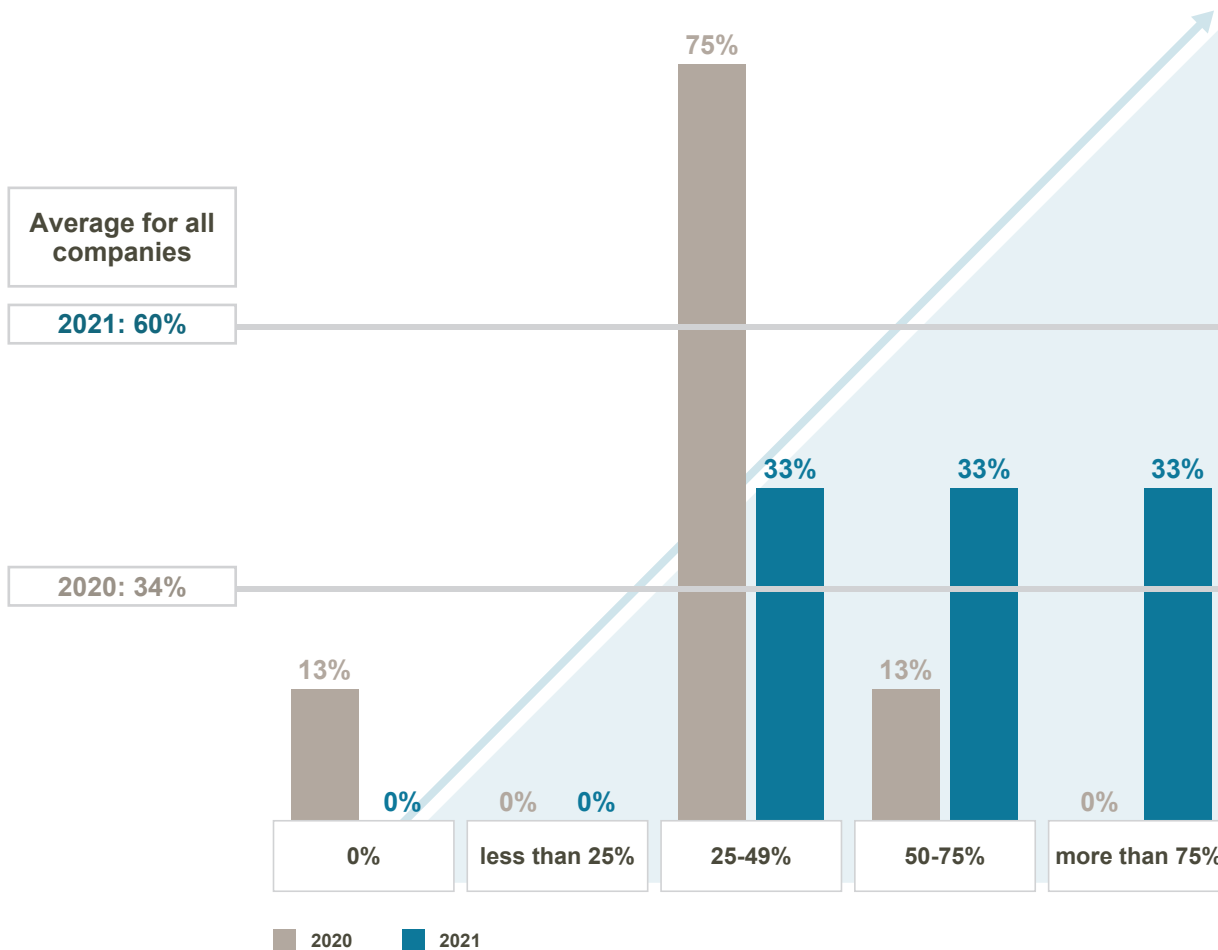
What do you believe would most help the “bounce back” of exhibitions?



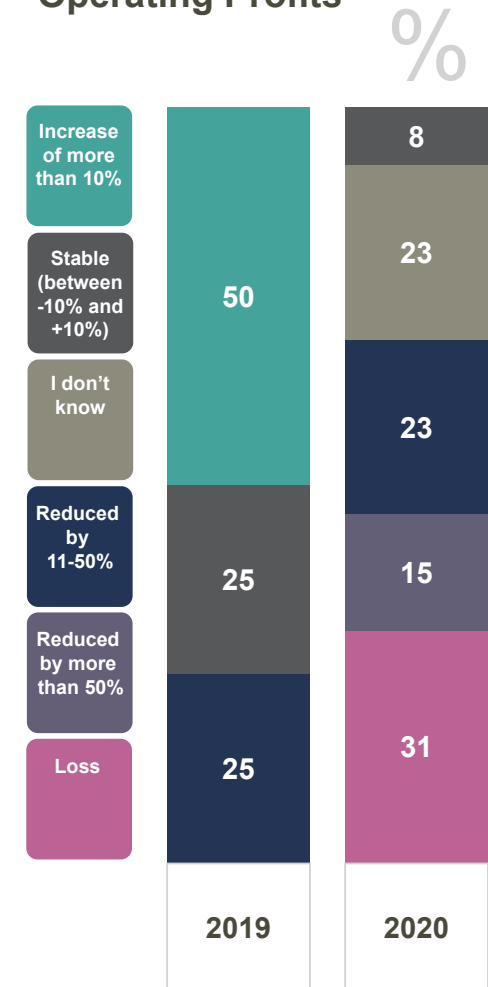
Detailed results for United Arab Emirates



Revenue compared to 2019



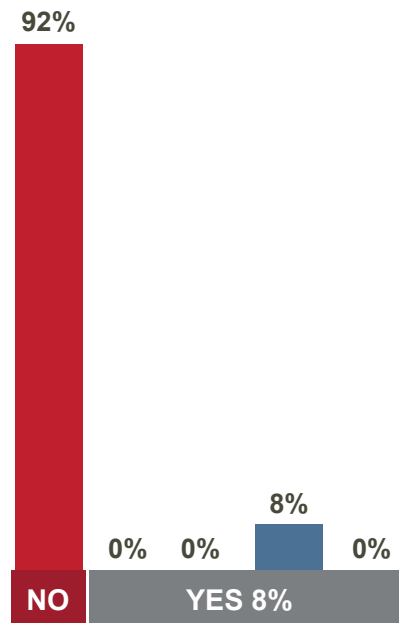
Operating Profits



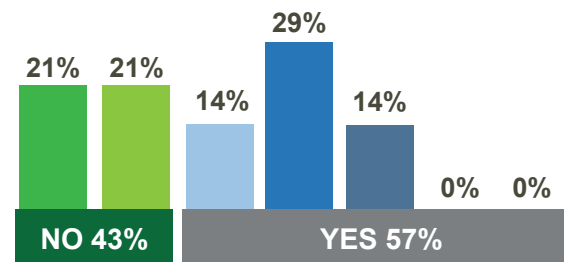
Detailed results for United Arab Emirates



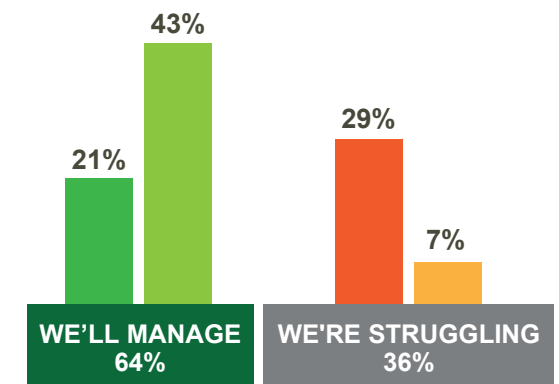
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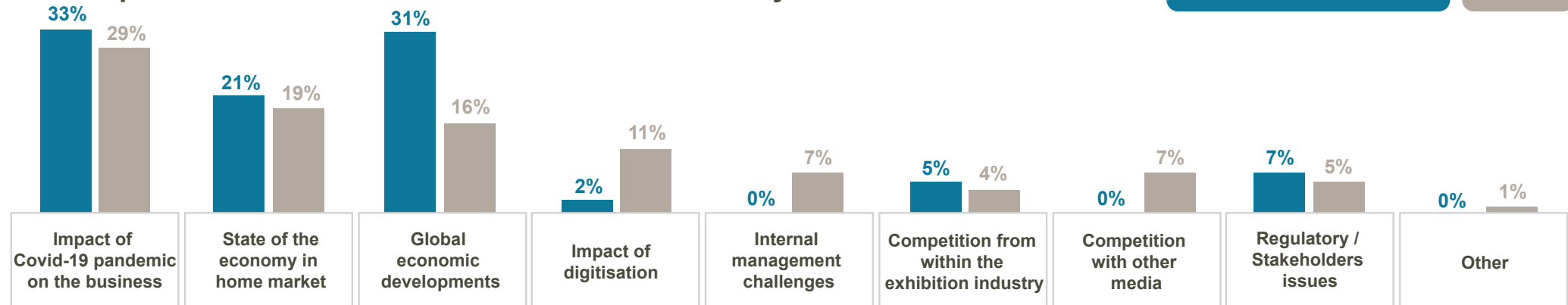
Detailed results for United Arab Emirates



Most important business issues in the exhibition industry

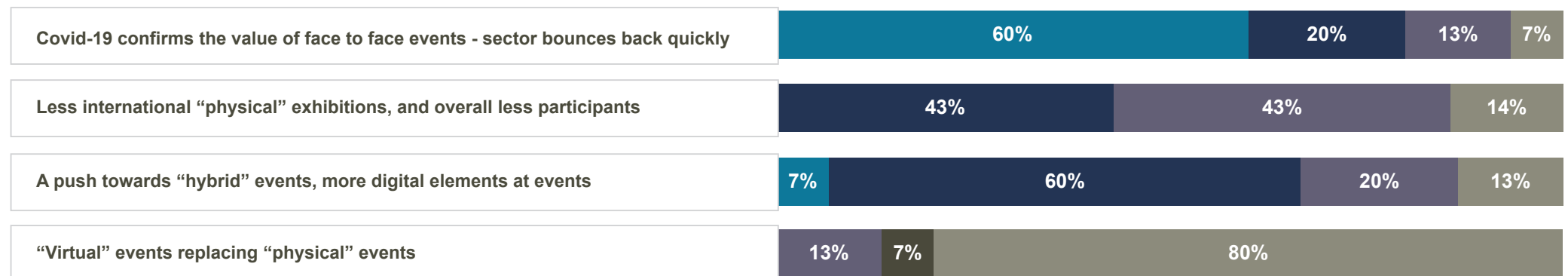
United Arab Emirates

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

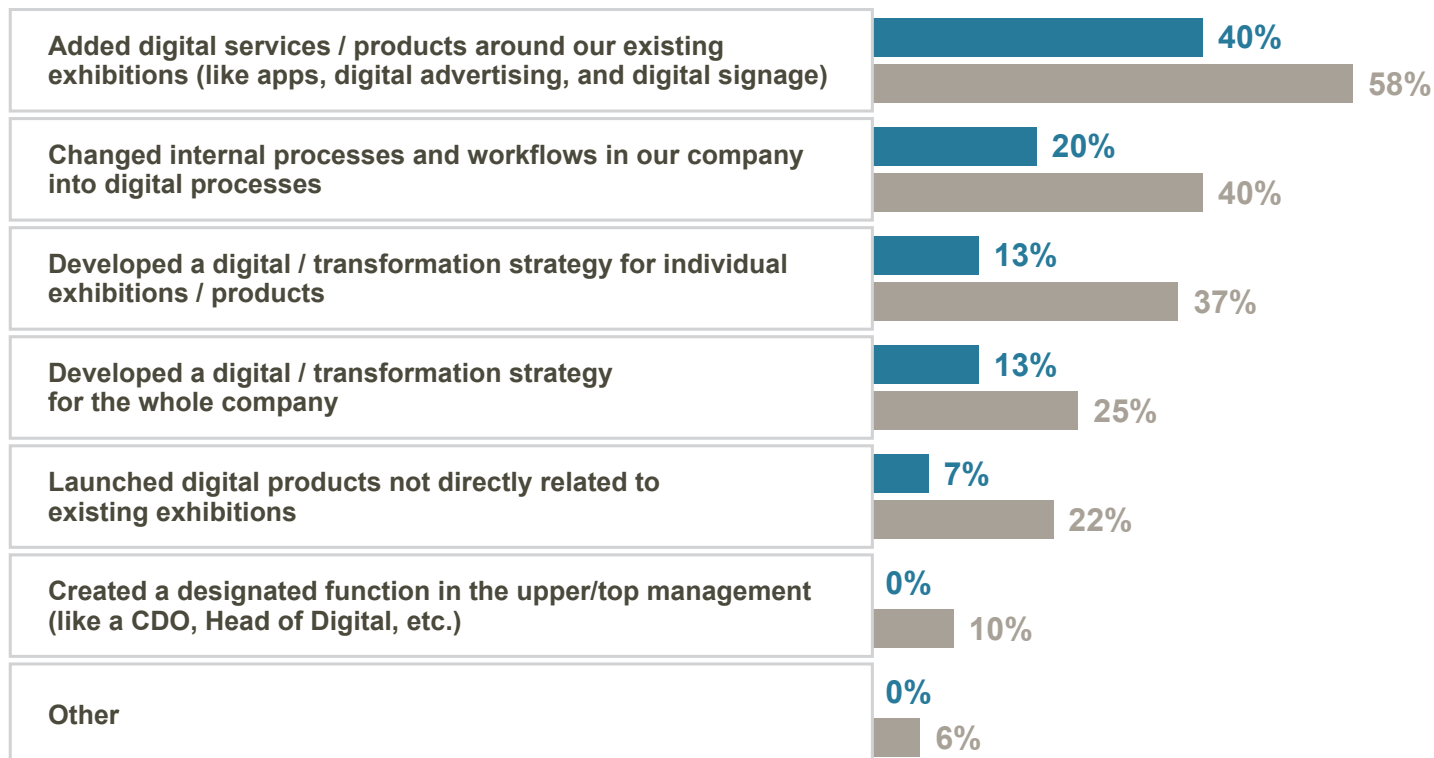




United Arab Emirates

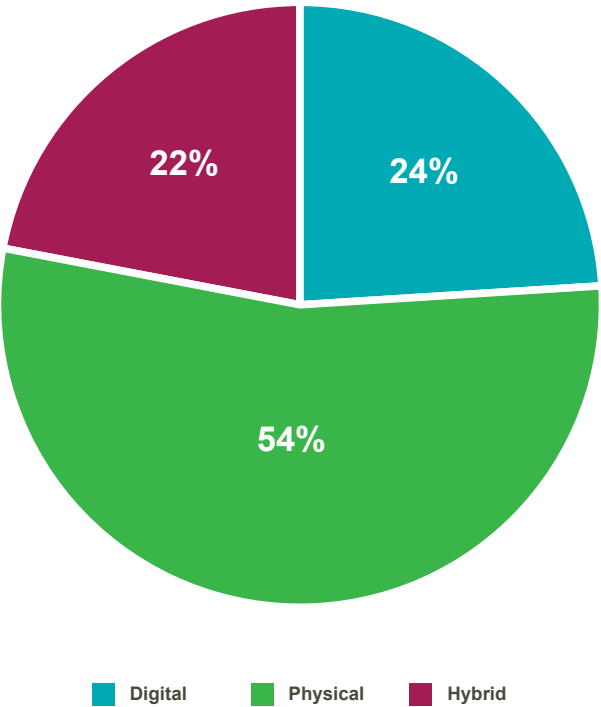
Global

Digitisation: implementation in United Arab Emirates and globally

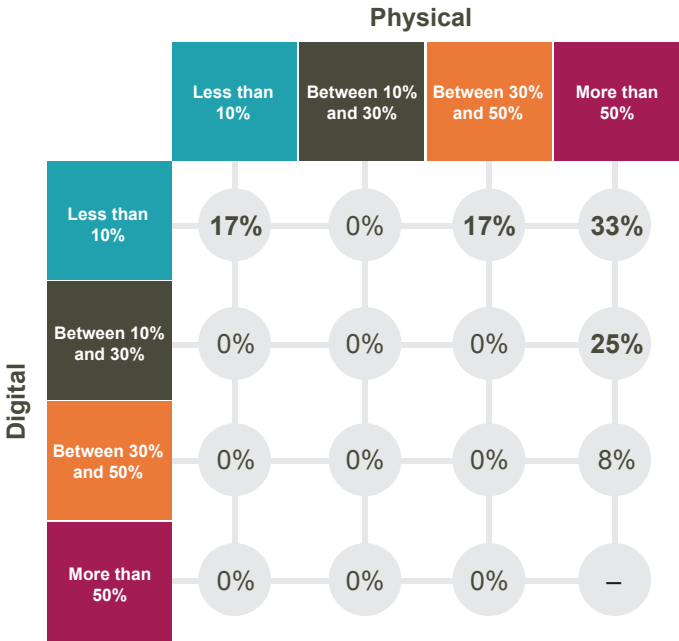




Number of fairs projected in 2021

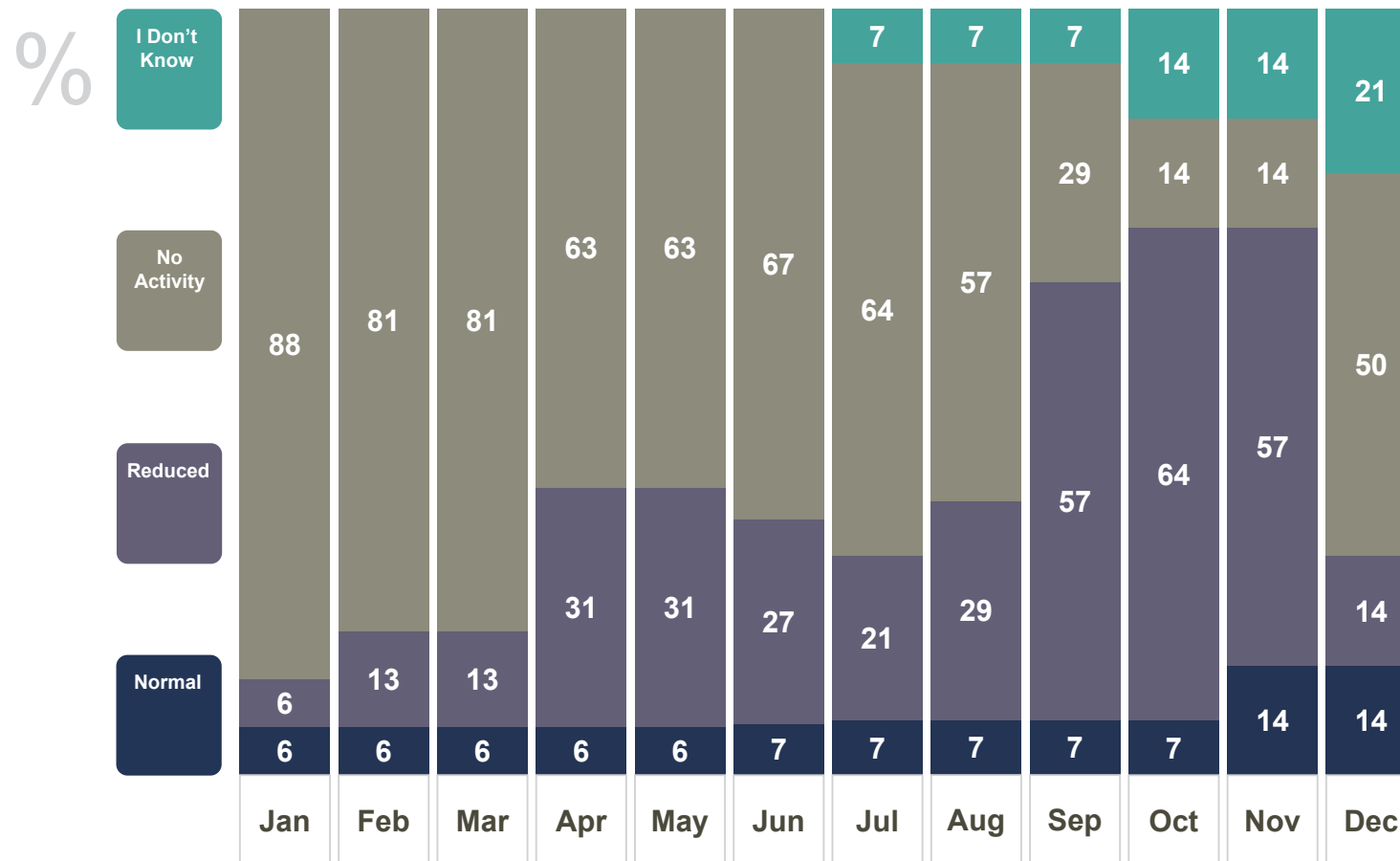


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



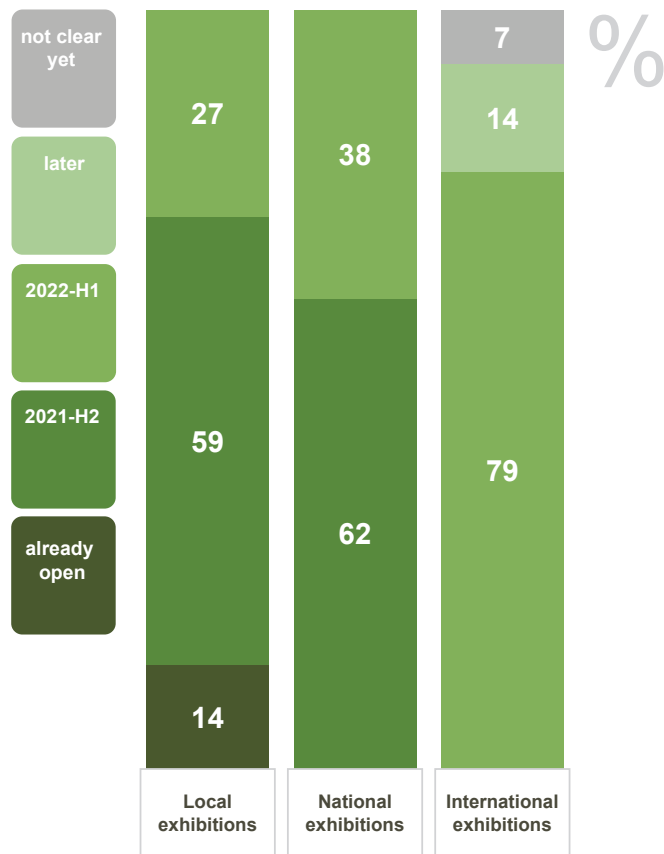


Situation of industry operations in 2021

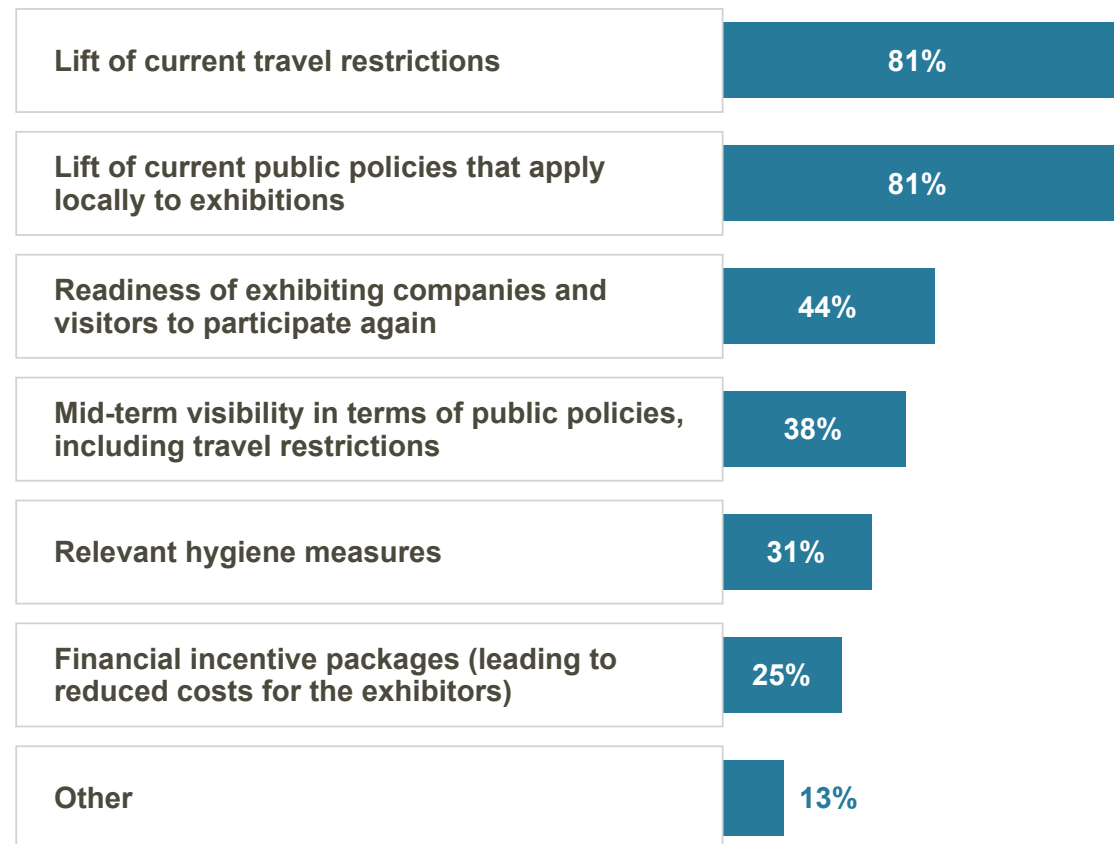




When do you believe exhibitions will open again in your city?

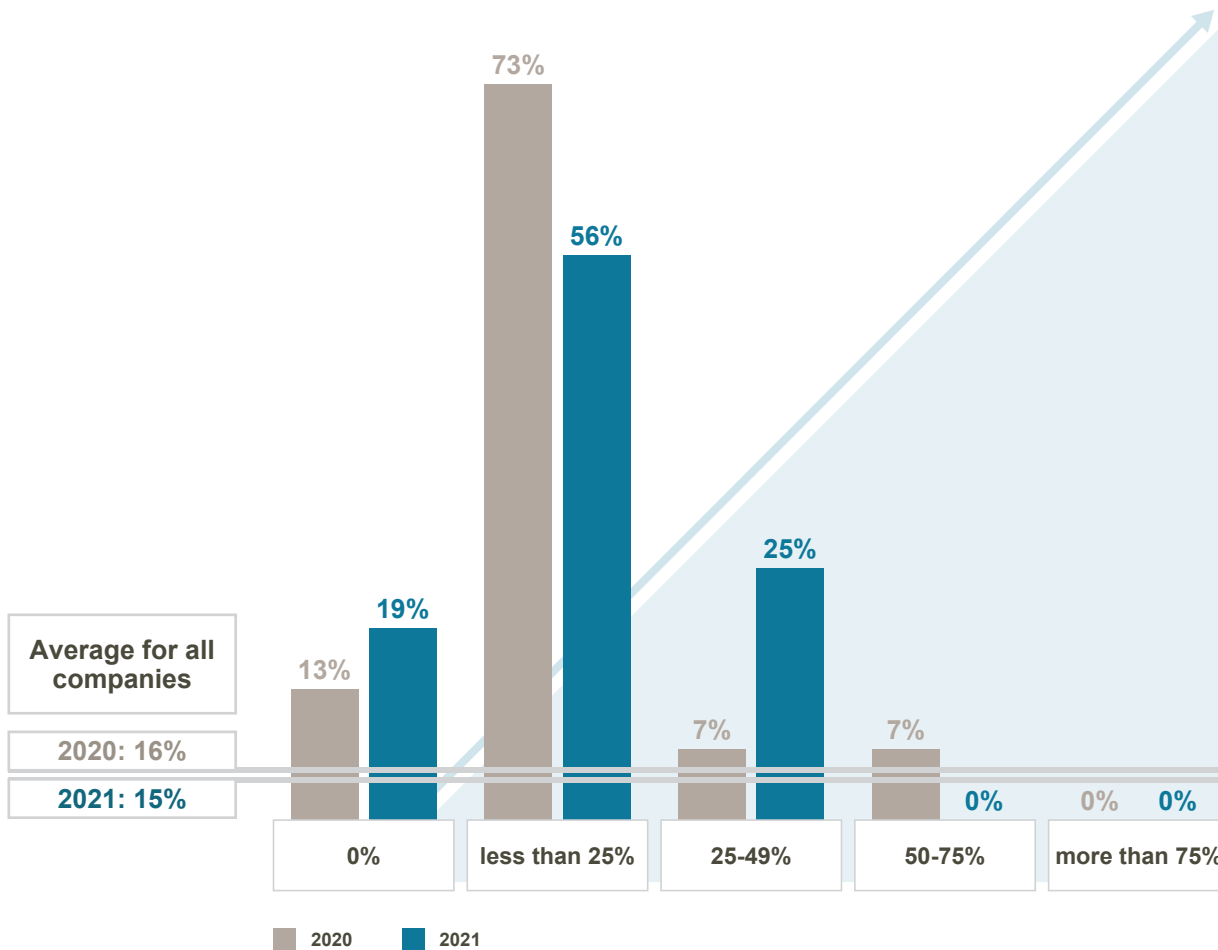


What do you believe would most help the “bounce back” of exhibitions?

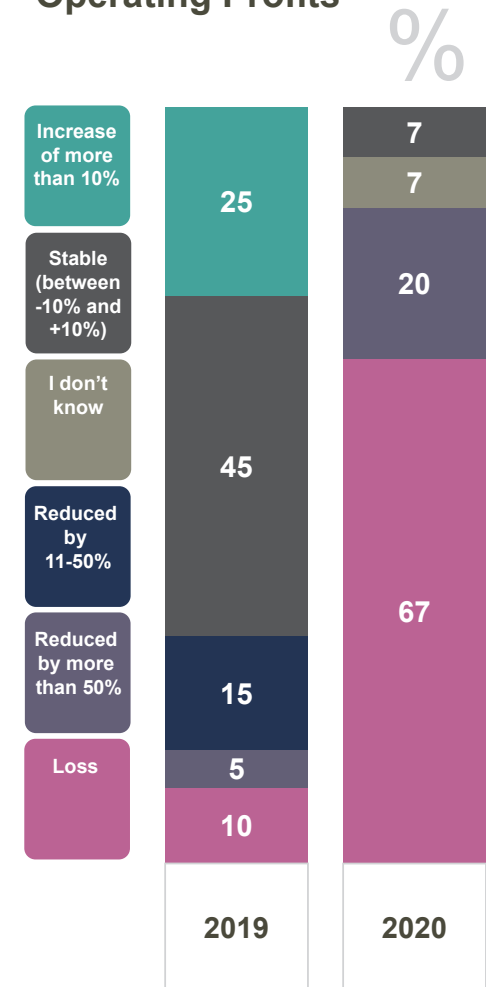




Revenue compared to 2019



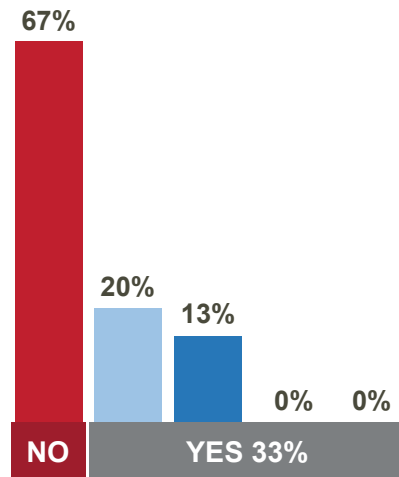
Operating Profits



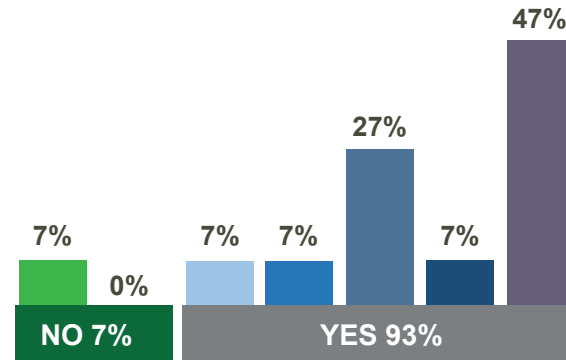
Detailed results for South Africa



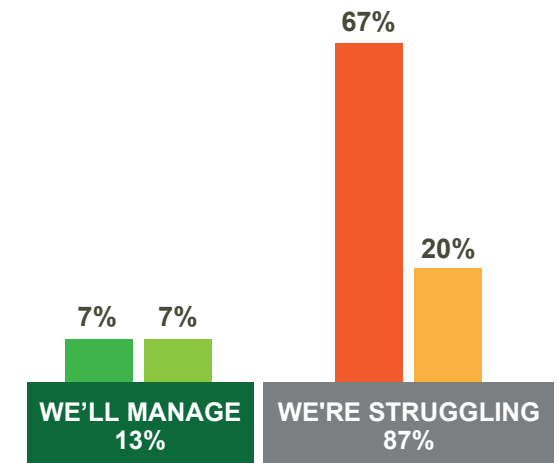
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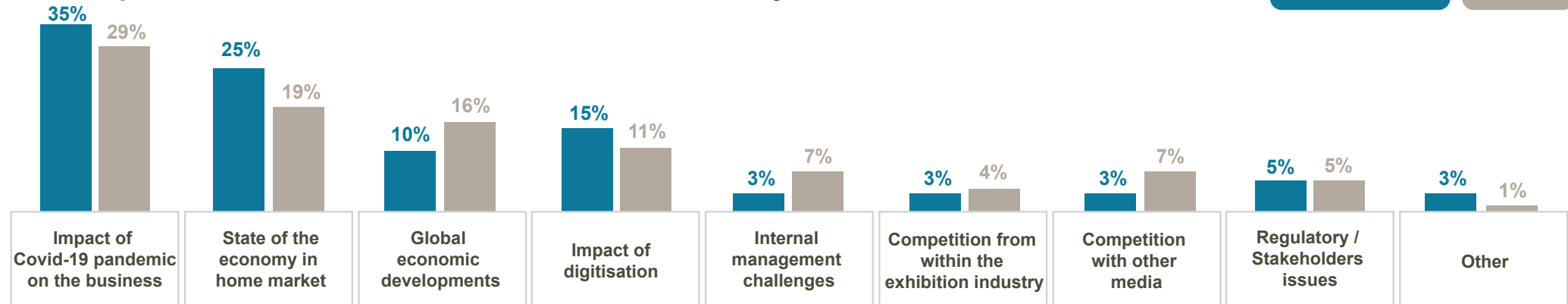
Detailed results for South Africa



Most important business issues in the exhibition industry

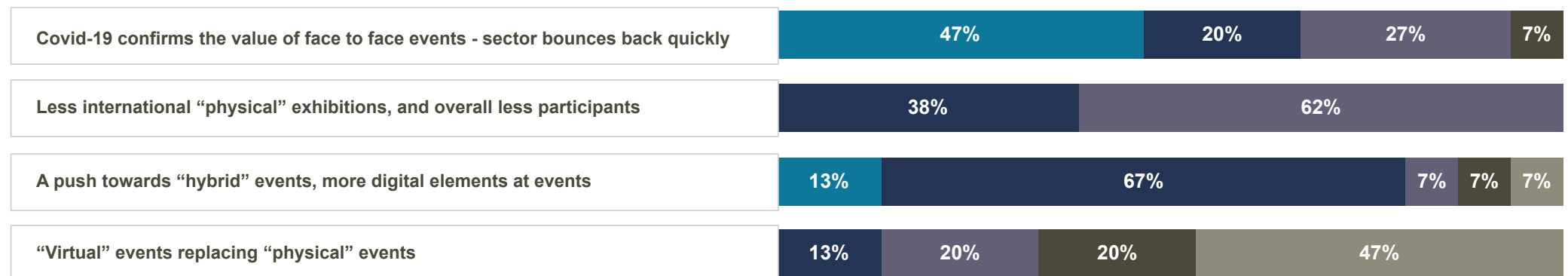
South Africa

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not





South Africa

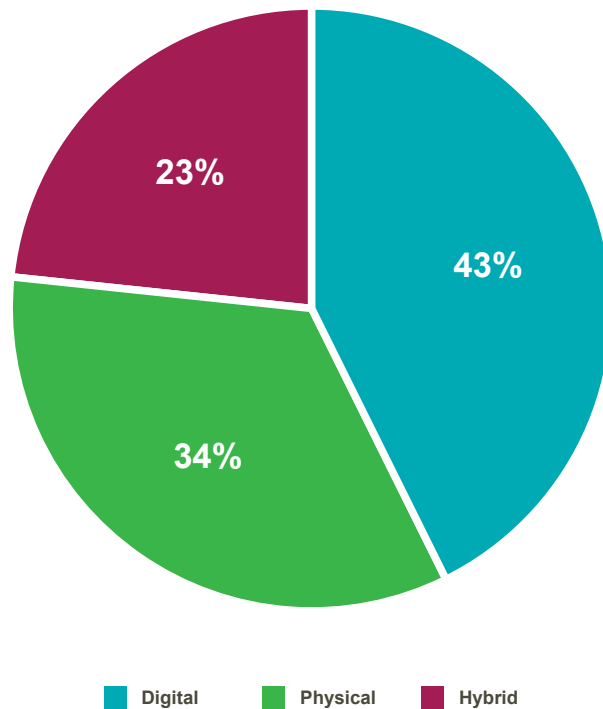
Global

Digitisation: implementation in South Africa and globally

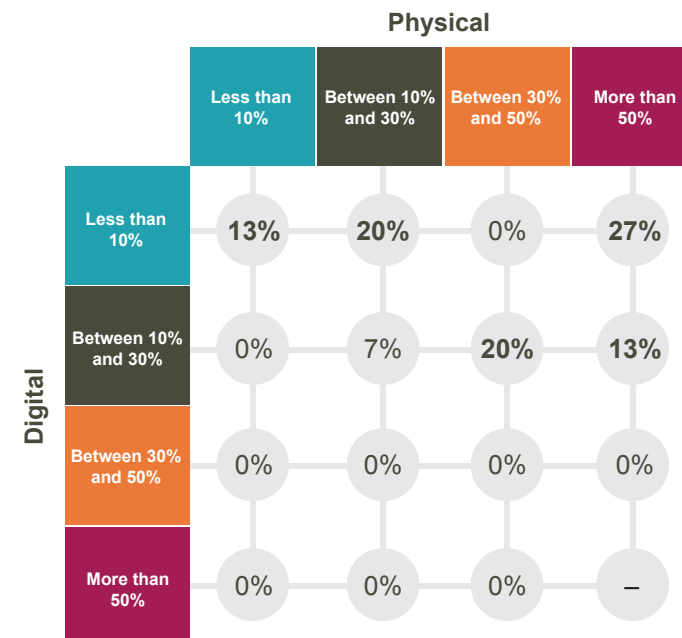




Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



Asia & Pacific

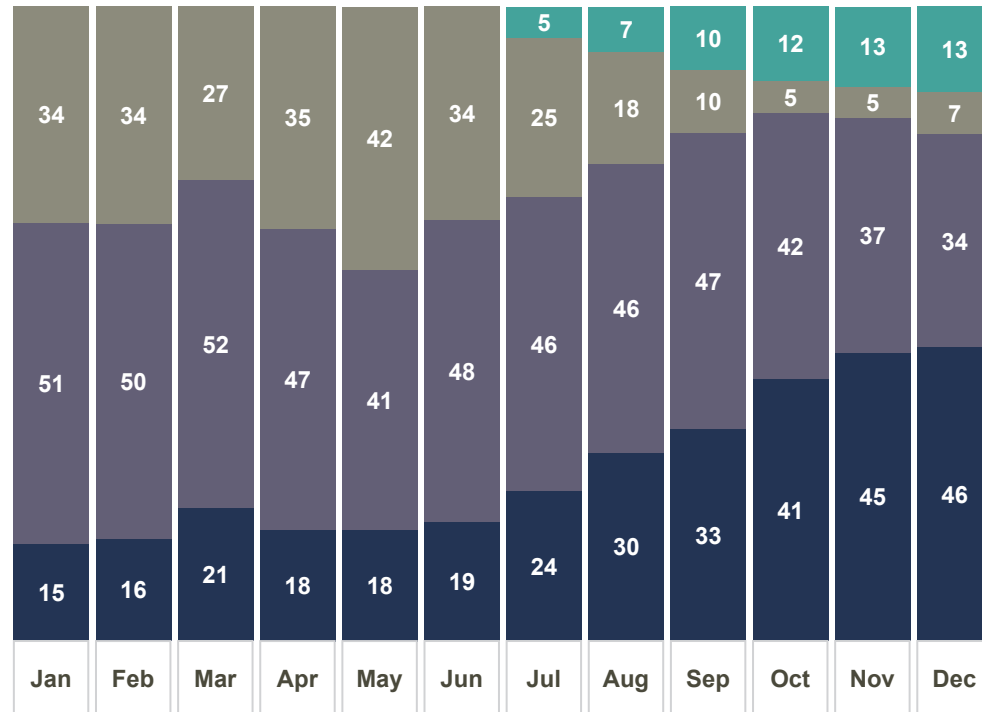


Operations - Reopening Exhibitions Asia & Pacific

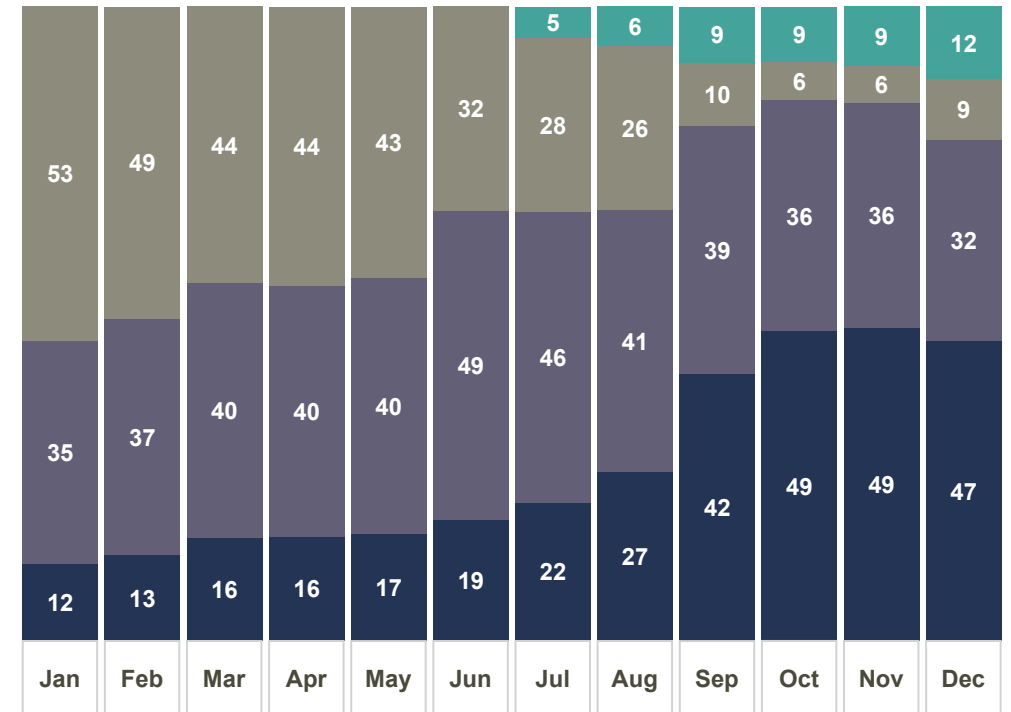
Situation of industry operations in 2021



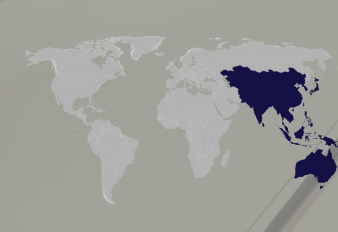
Asia & Pacific



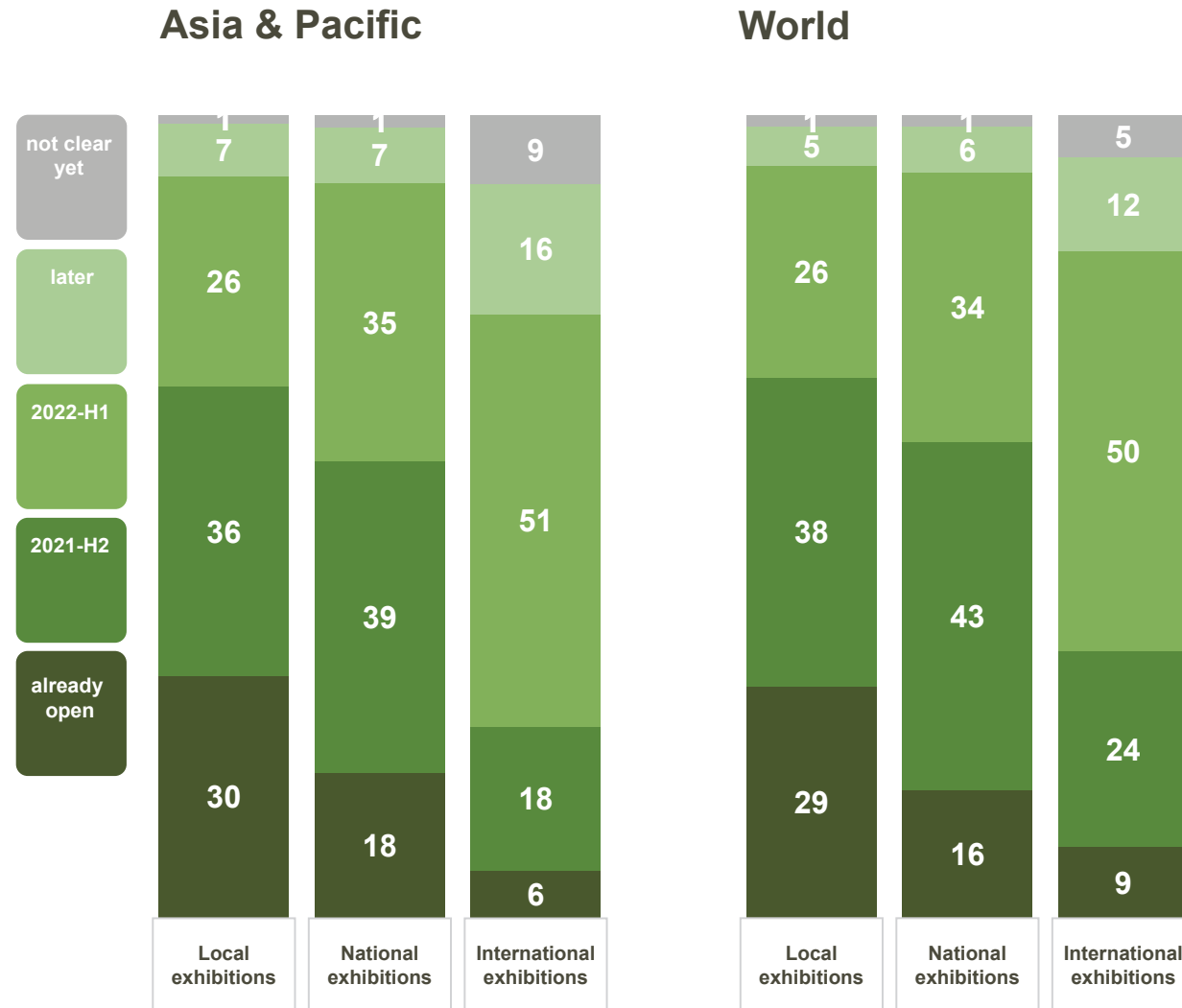
World



Operations - Reopening Exhibitions Asia & Pacific

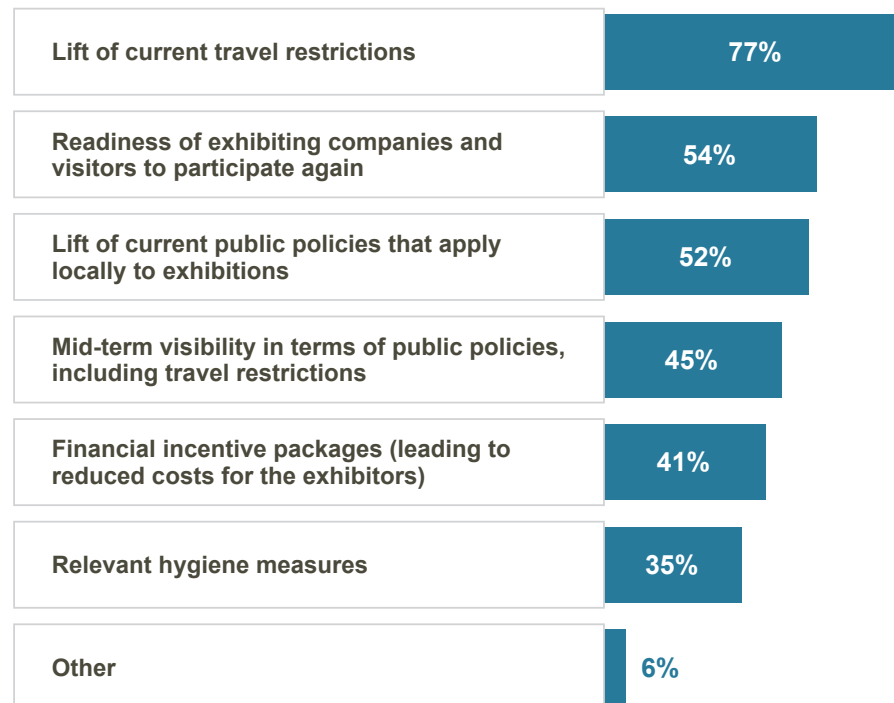


When do you believe
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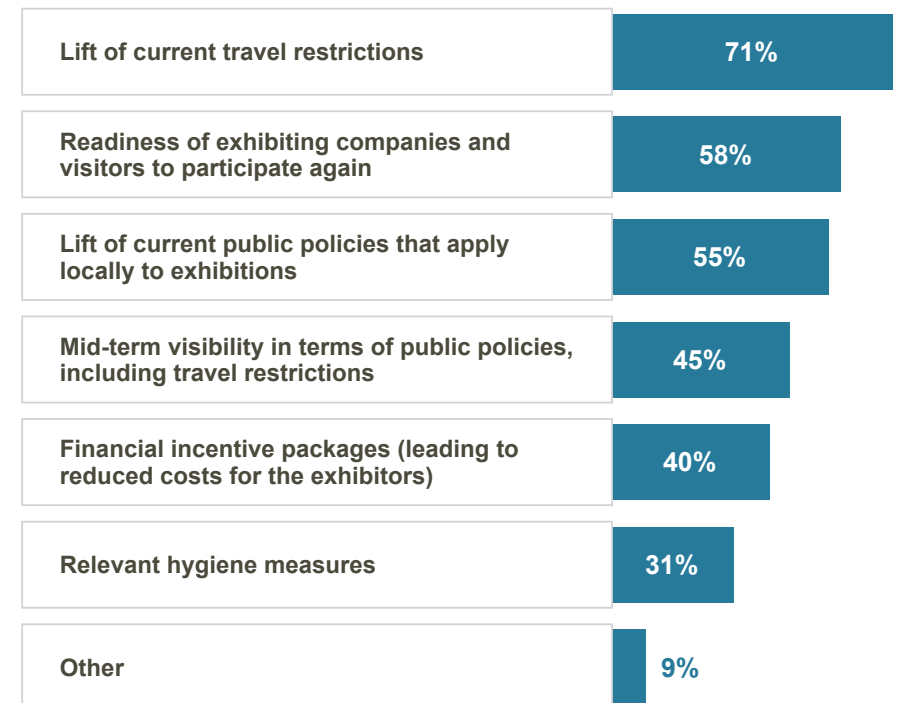


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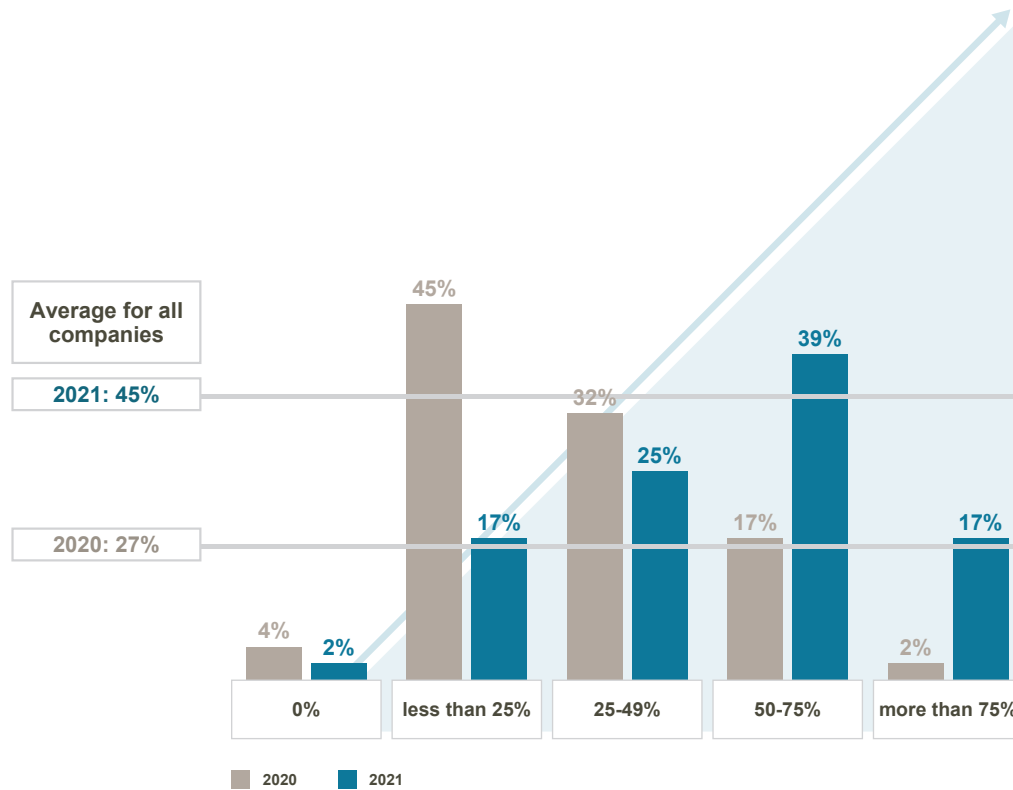
Asia & Pacific



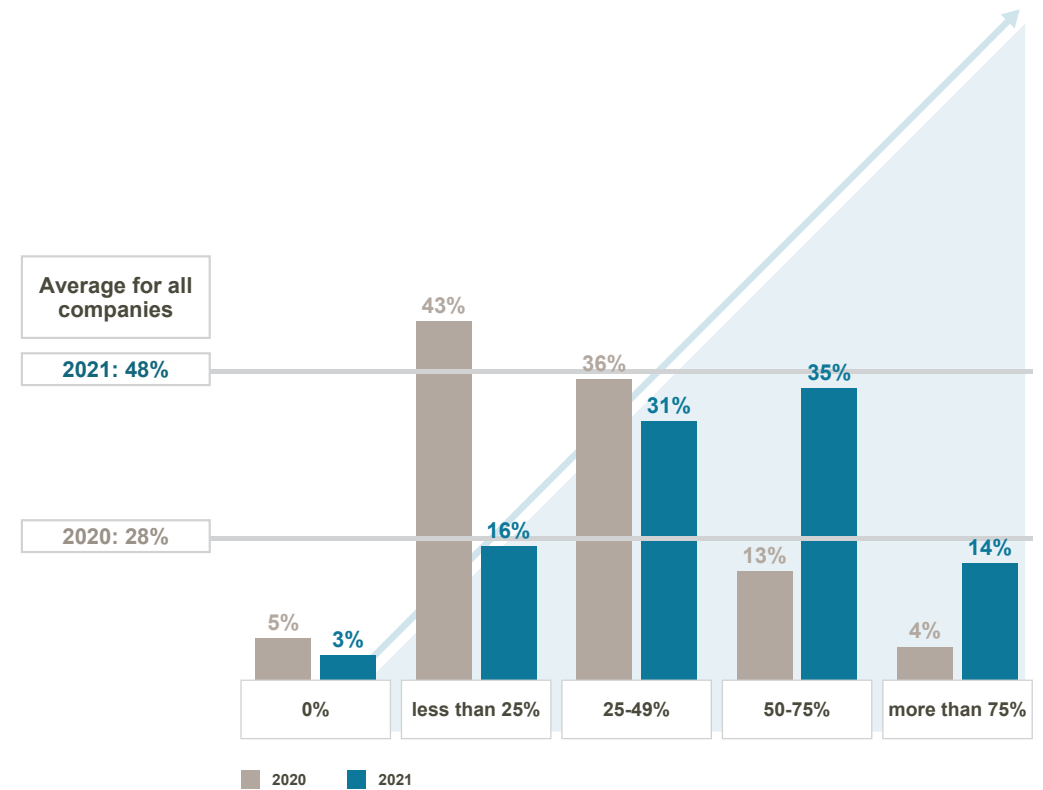
World



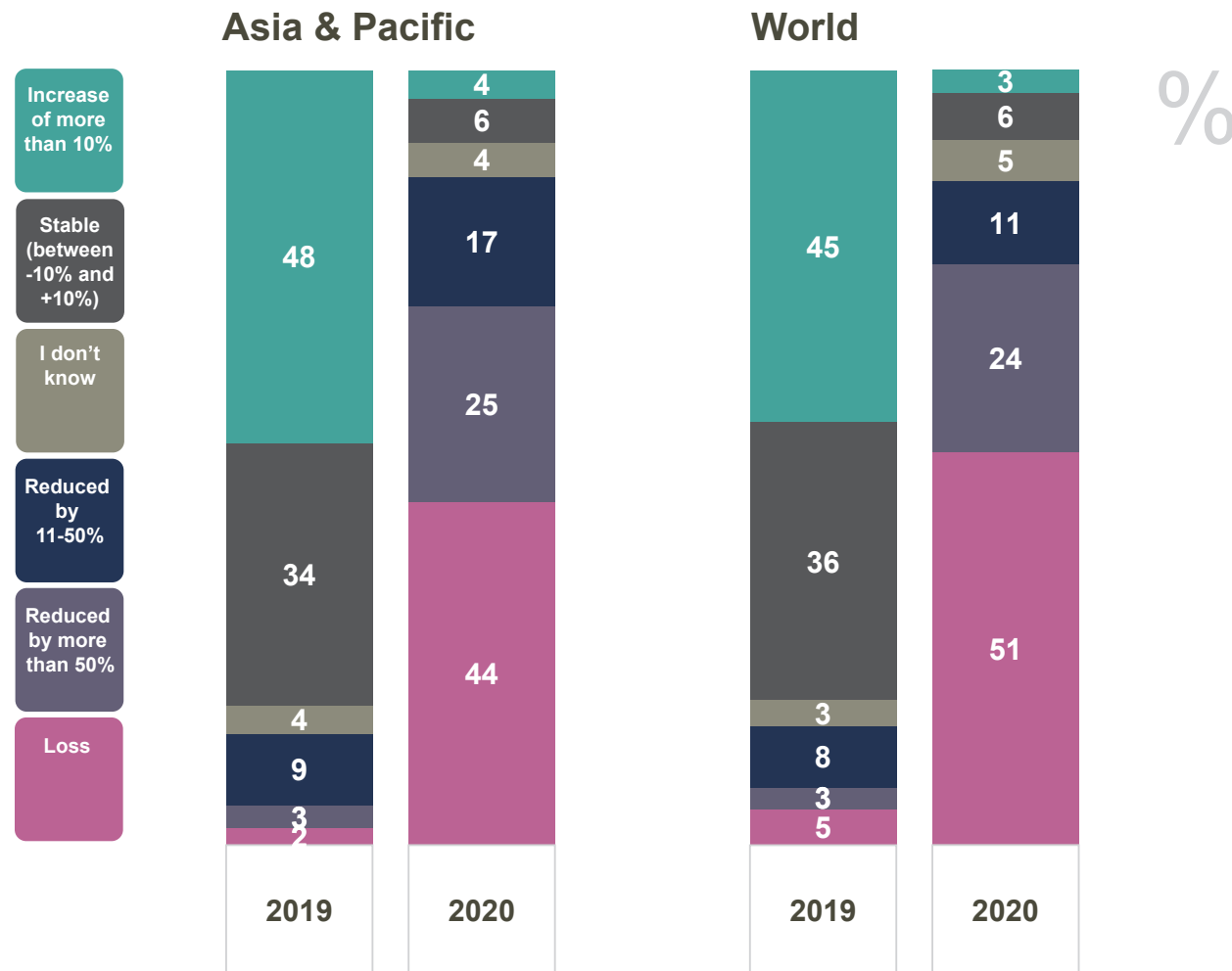
Revenue compared to 2019 Asia & Pacific



World



Operating profits Asia & Pacific

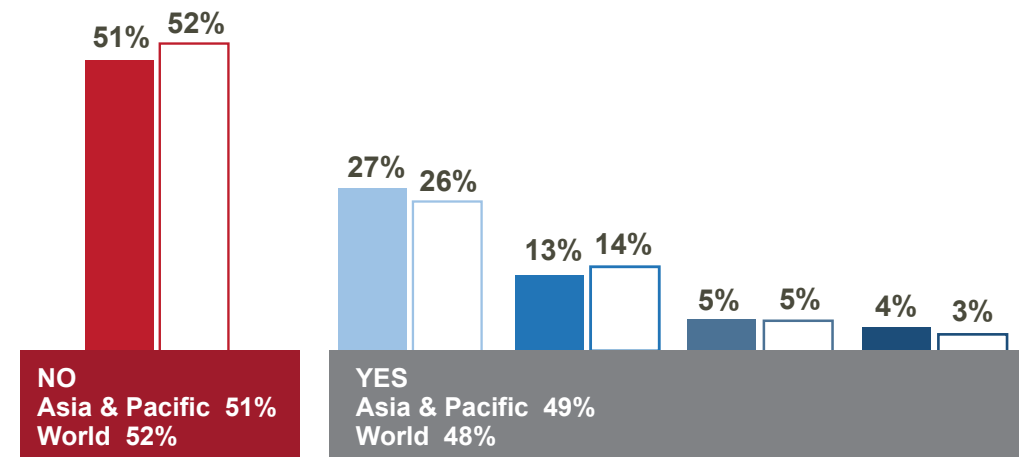


Did your company benefit from public financial support?

Asia & Pacific

World

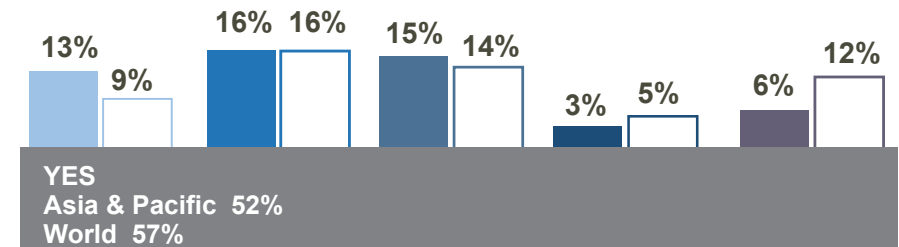
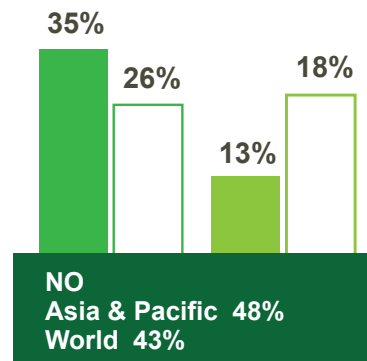
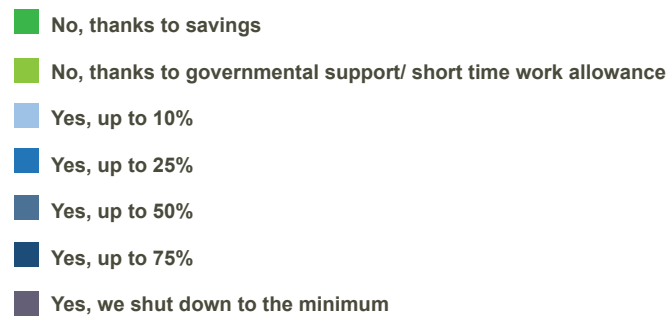
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Have you had to reduce your workforce?

Asia & Pacific

World

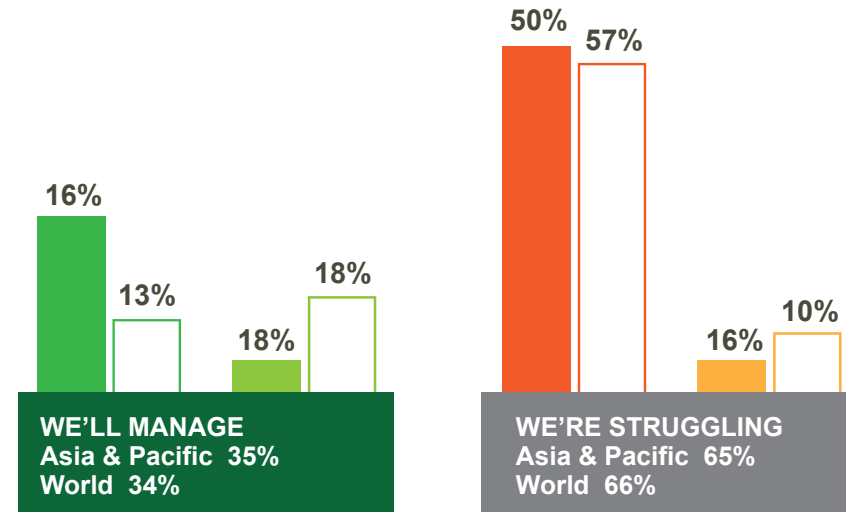


If there is no business for the next 6 months,
which best applies?

Asia & Pacific

World

- It's okay, we have extended our offering to other profitable work areas
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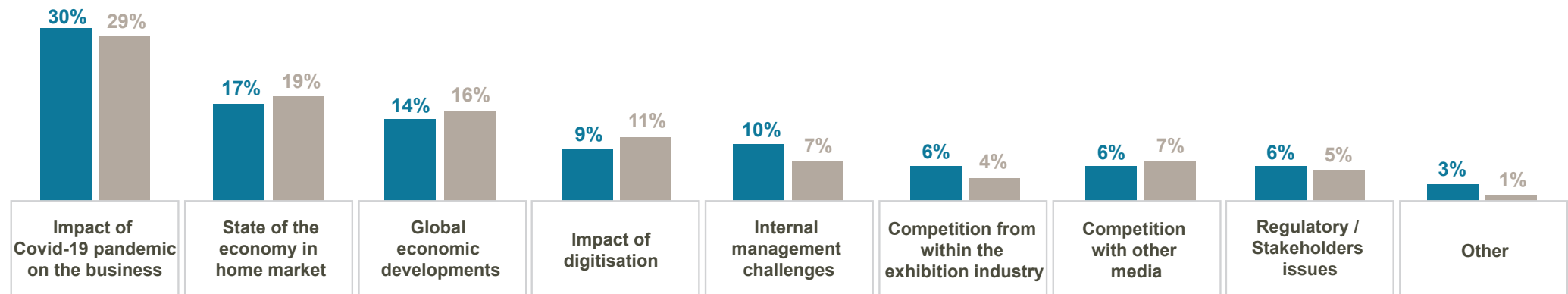


Most Important Business Issues - Format of Exhibitions - Asia & Pacific

Most important business issues in the exhibition industry

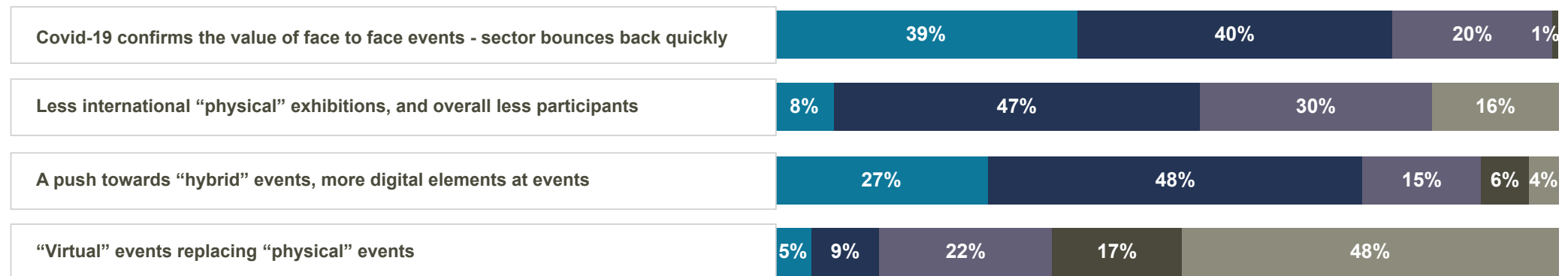
Asia & Pacific

Global



Format of exhibitions in the coming years

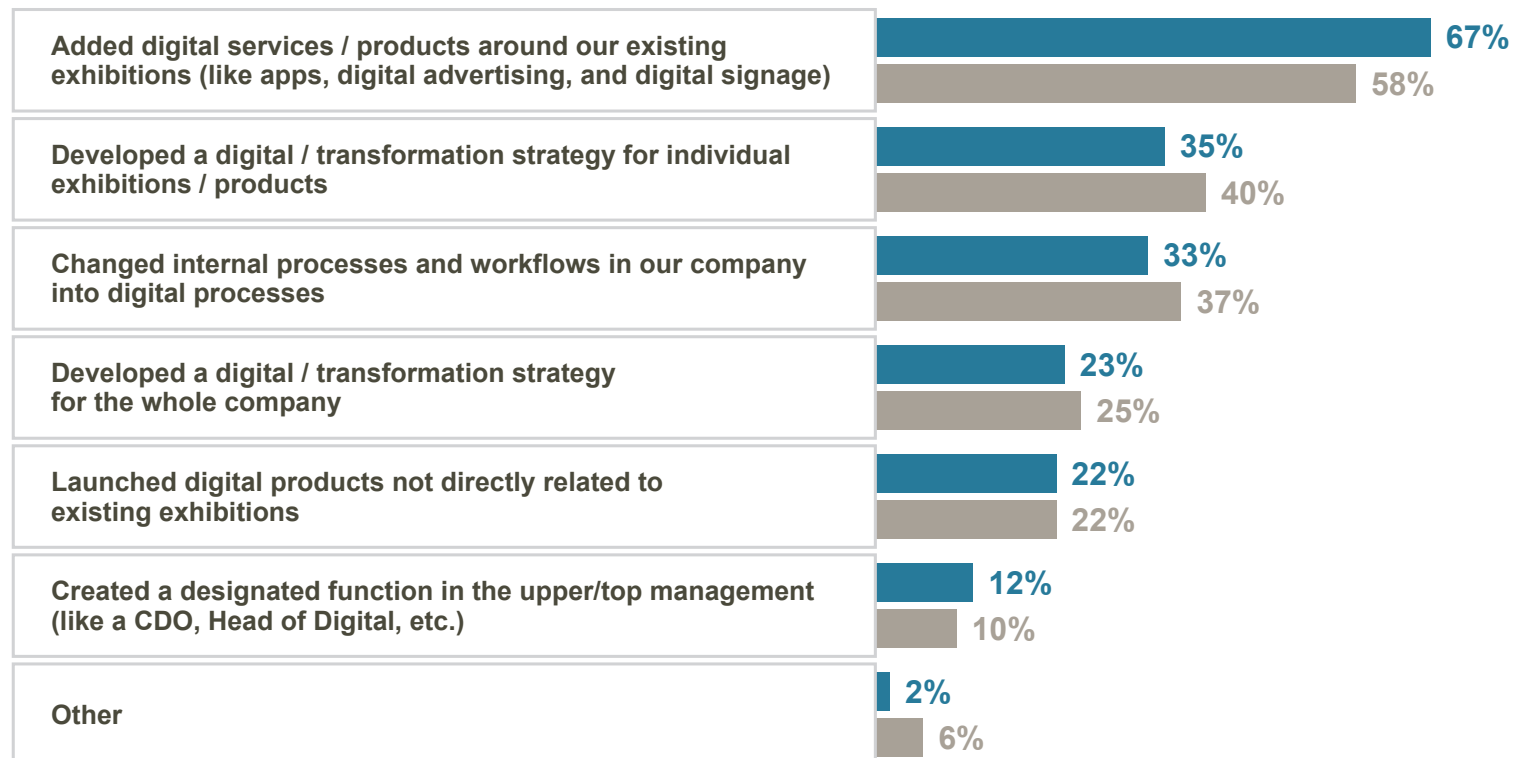
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not



Asia & Pacific

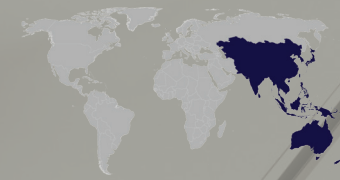
Global

Digitisation: implementation in Asia/Pacific and globally

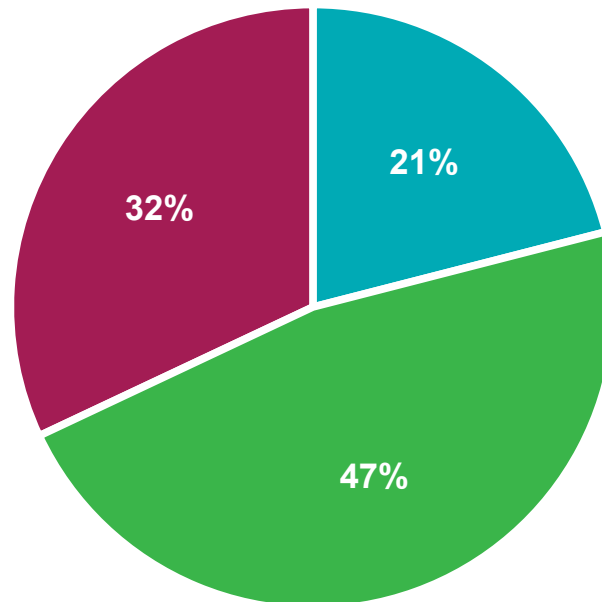


Number of fairs projected in 2021

Asia & Pacific

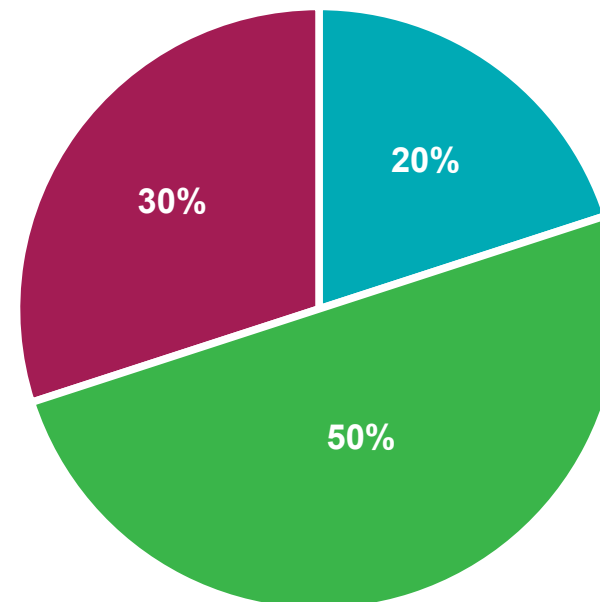


Asia & Pacific



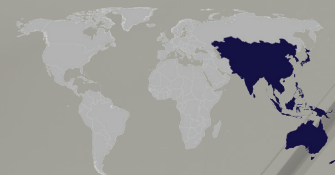
■ Digital ■ Physical ■ Hybrid

World

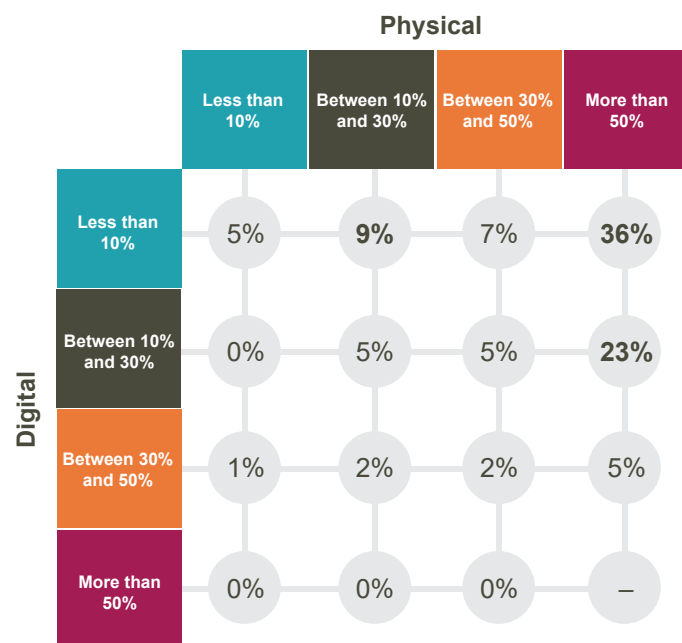


■ Digital ■ Physical ■ Hybrid

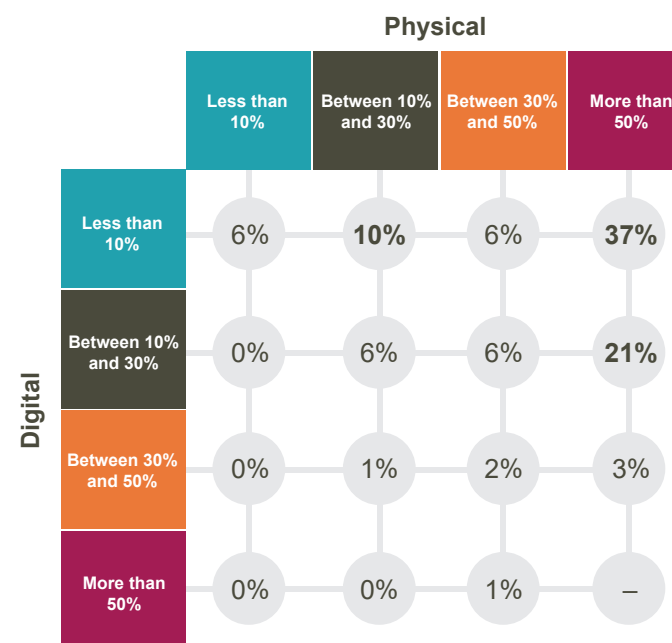
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



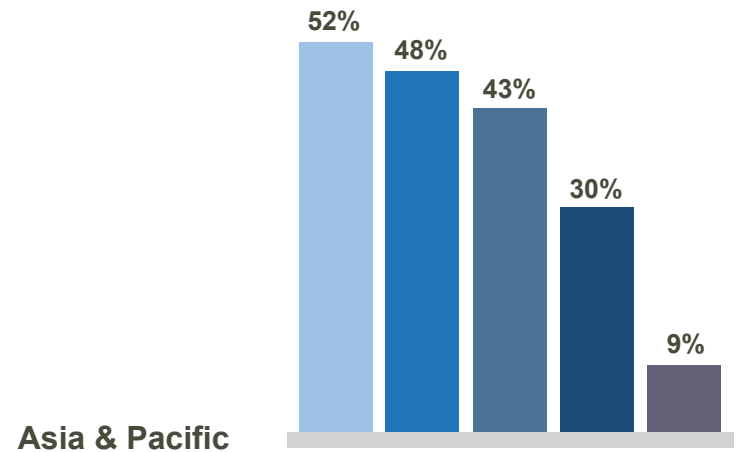
Asia & Pacific



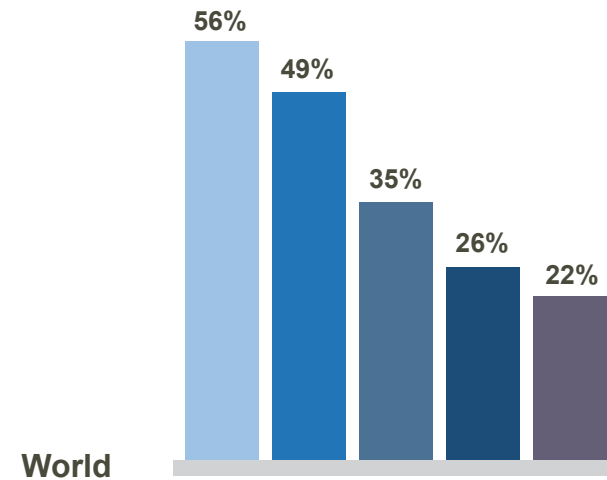
World



Expanded activities (for venues only) Asia & Pacific



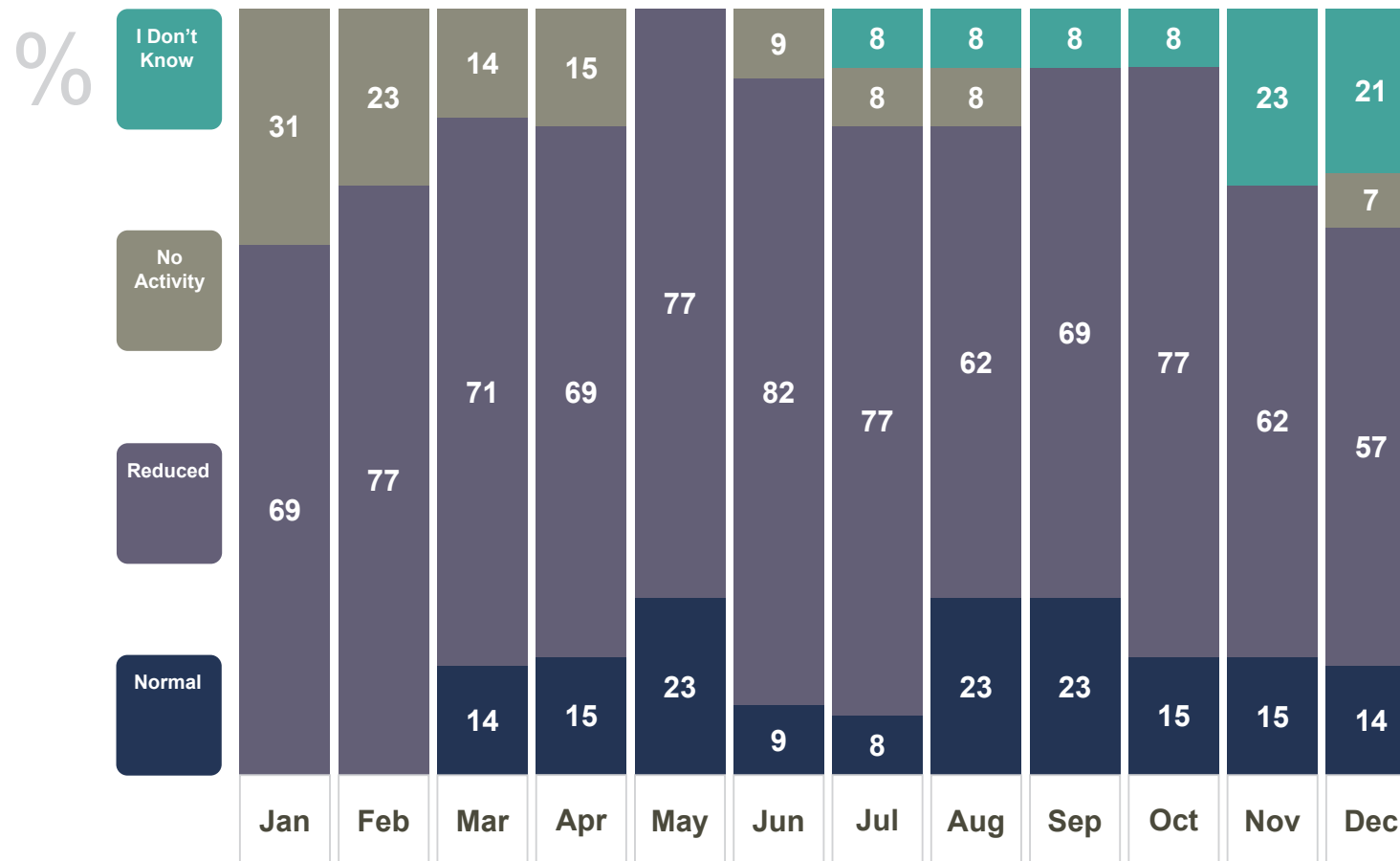
- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital

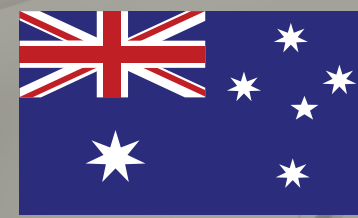


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- Site to generate brand activations
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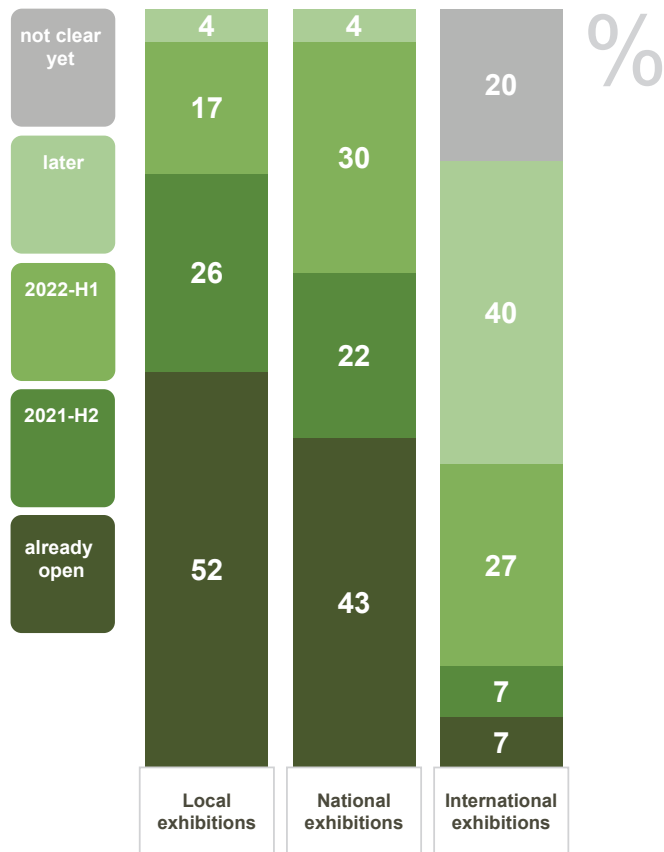


Situation of industry operations in 2021

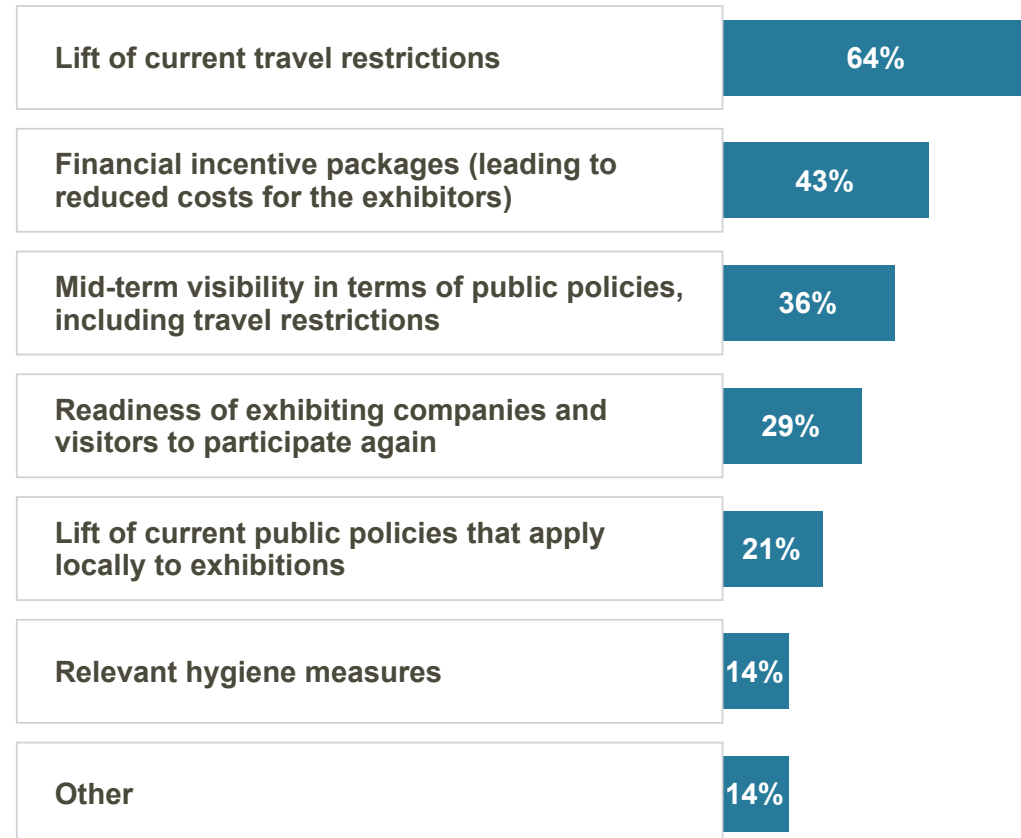




When do you believe exhibitions will open again in your city?



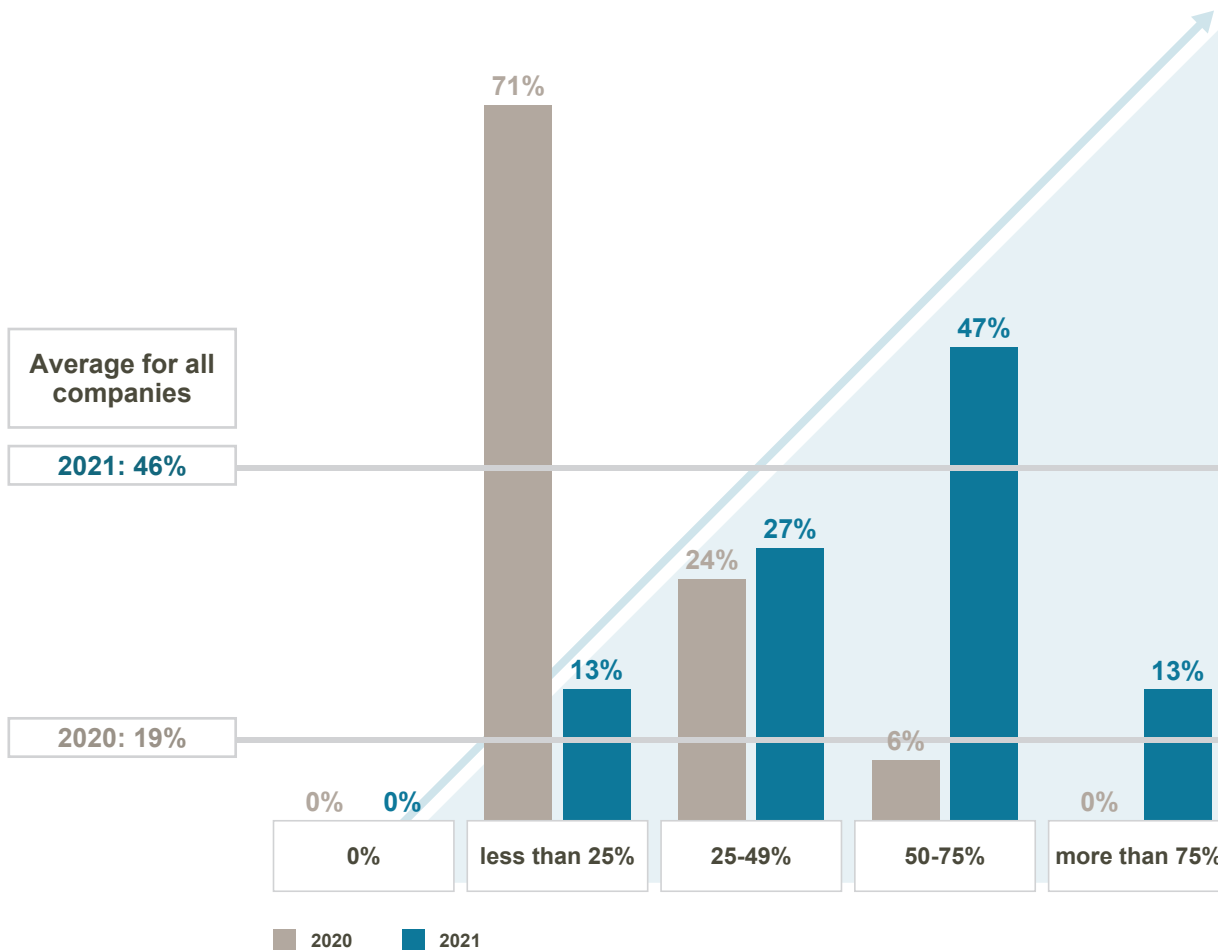
What do you believe would most help the “bounce back” of exhibitions?



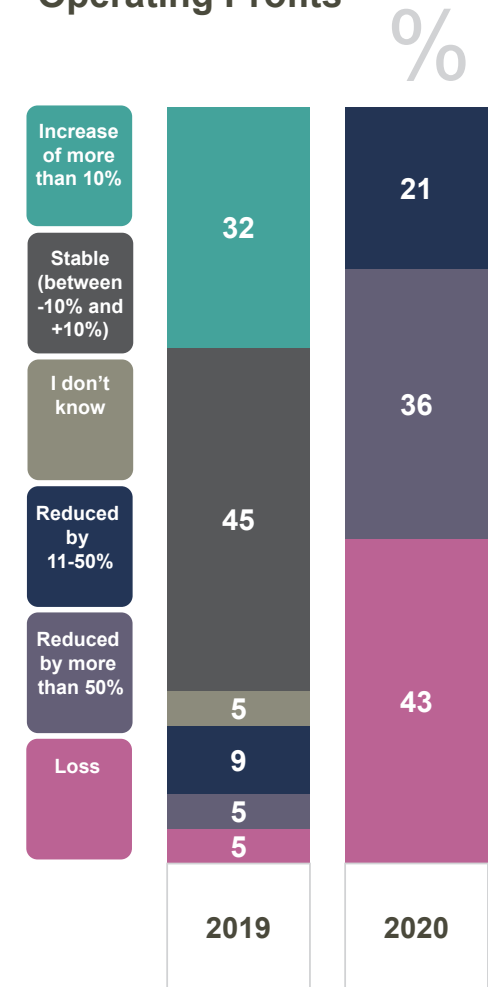
Detailed results for Australia



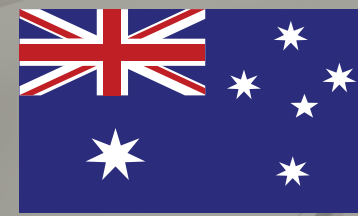
Revenue compared to 2019



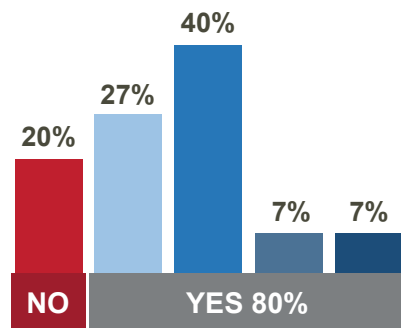
Operating Profits



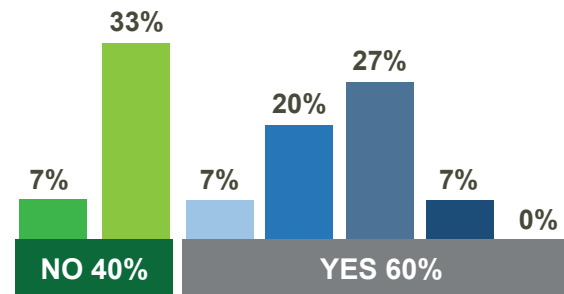
Detailed results for Australia



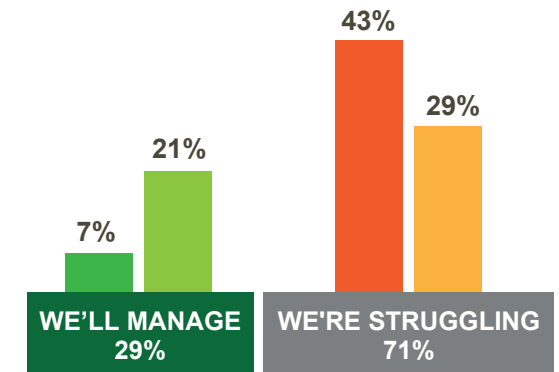
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

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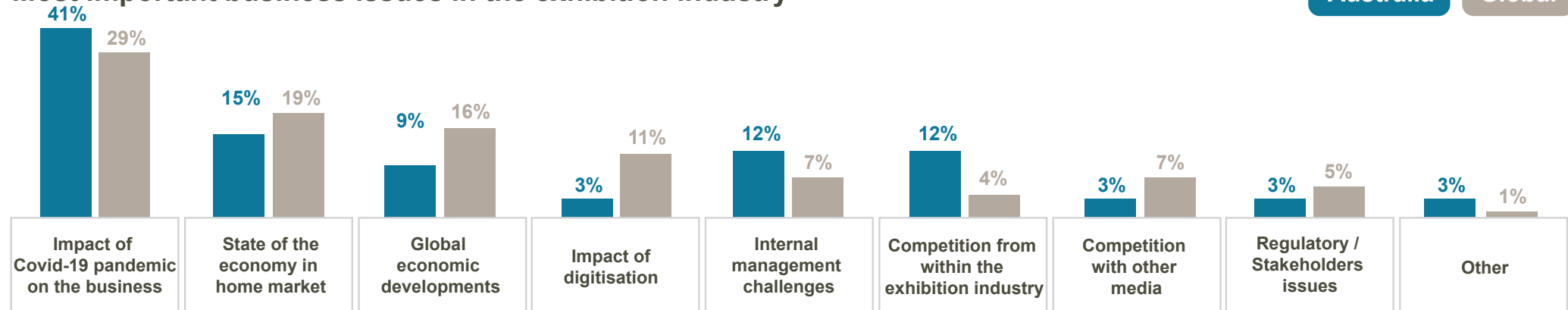
Detailed results for Australia



Most important business issues in the exhibition industry

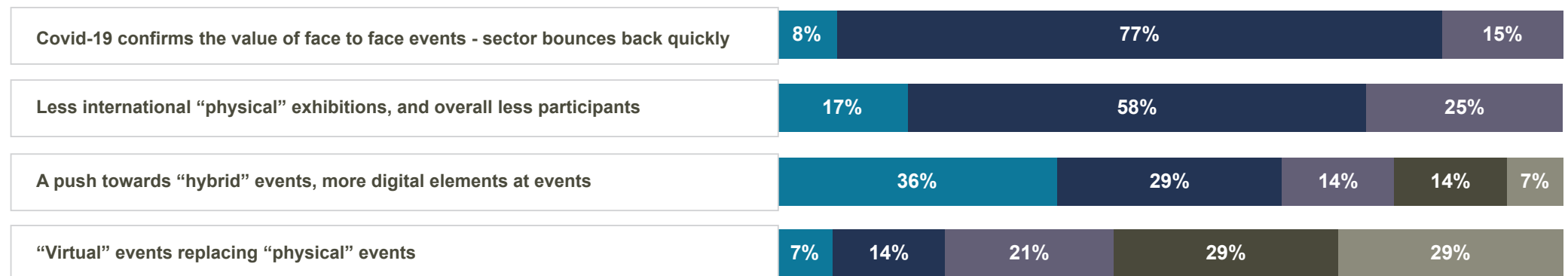
Australia

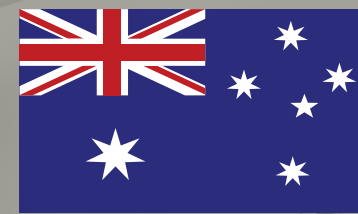
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

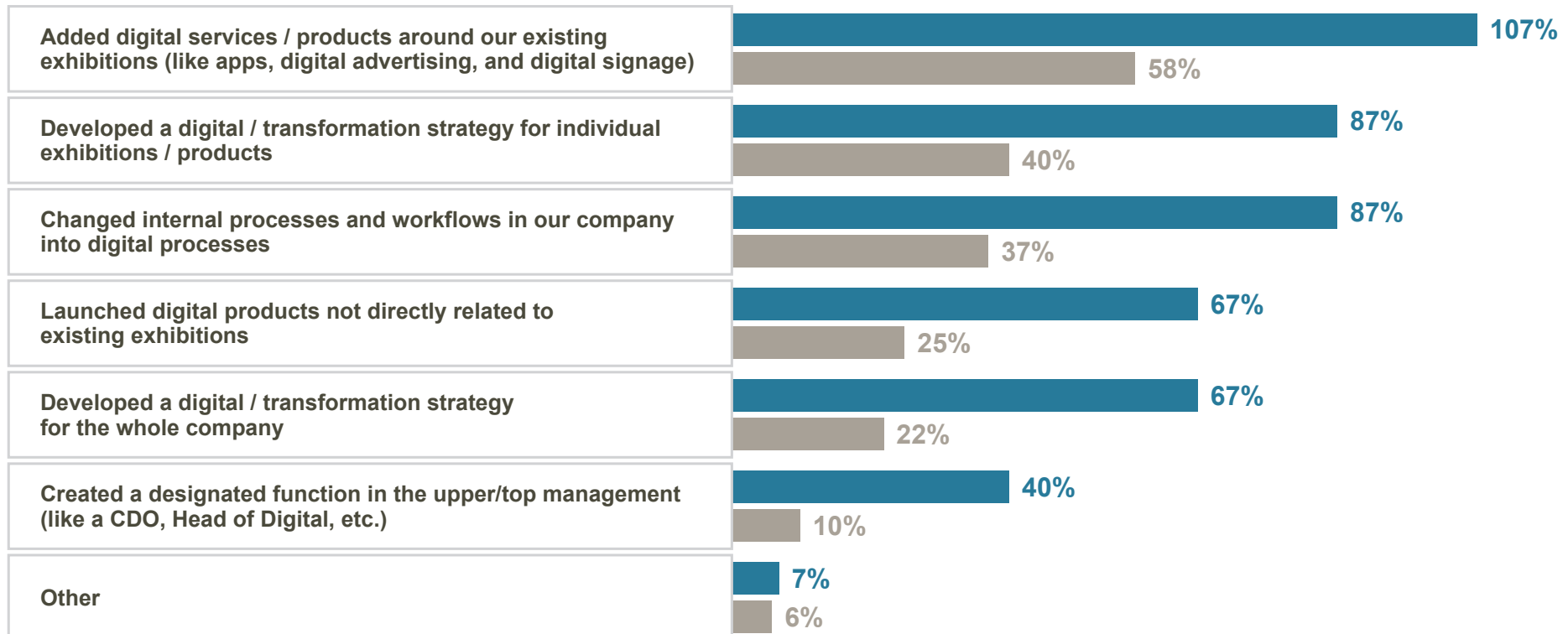




Australia

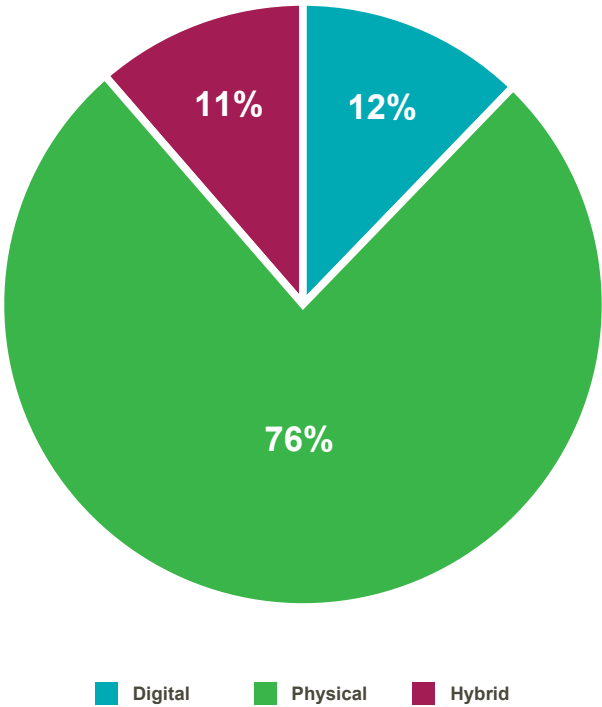
Global

Digitisation: implementation in Australia and globally

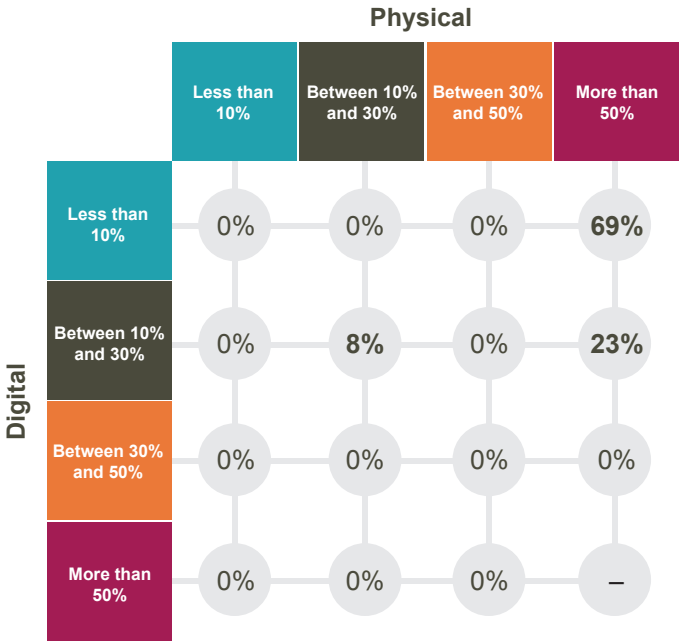




Number of fairs projected in 2021

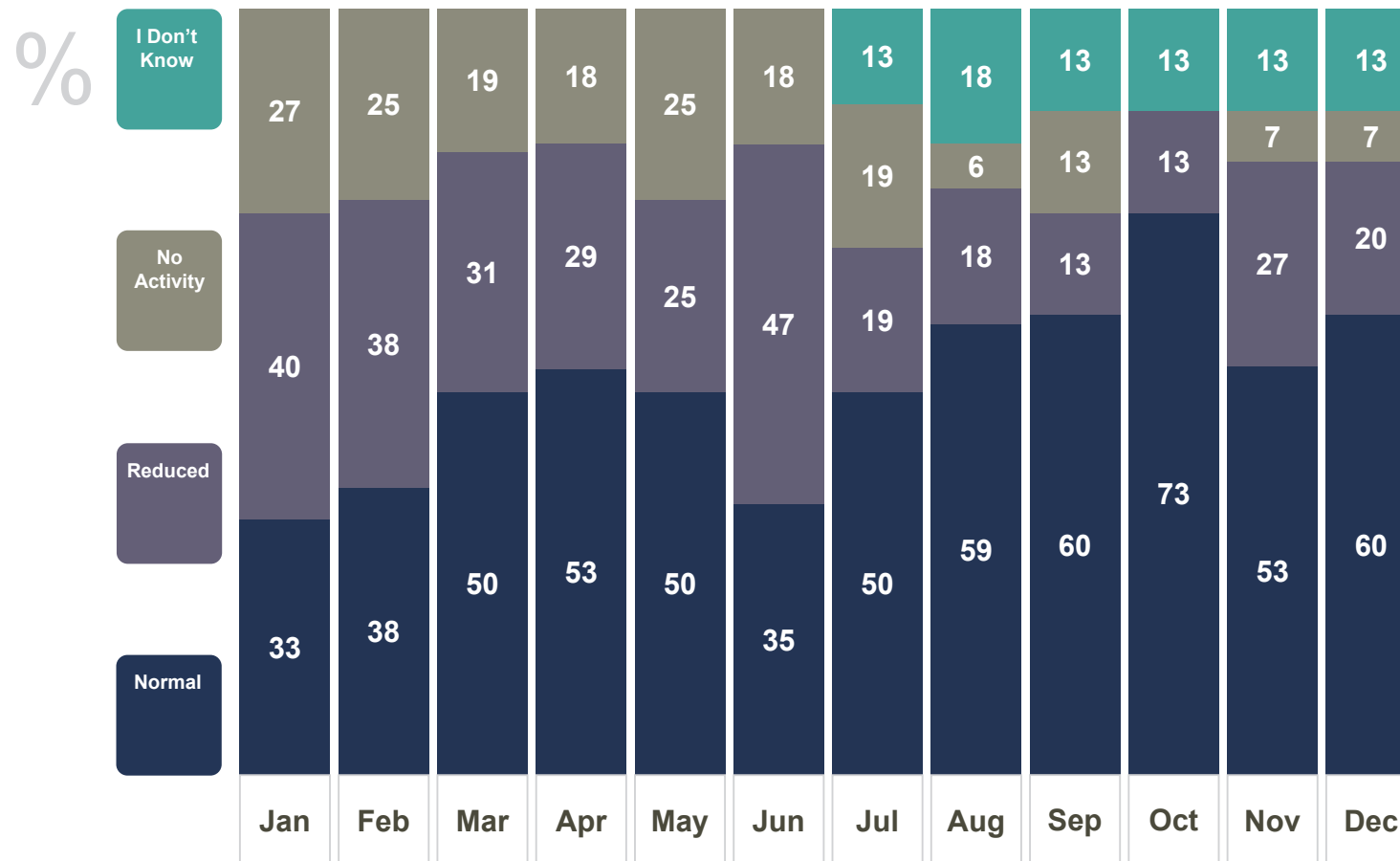


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



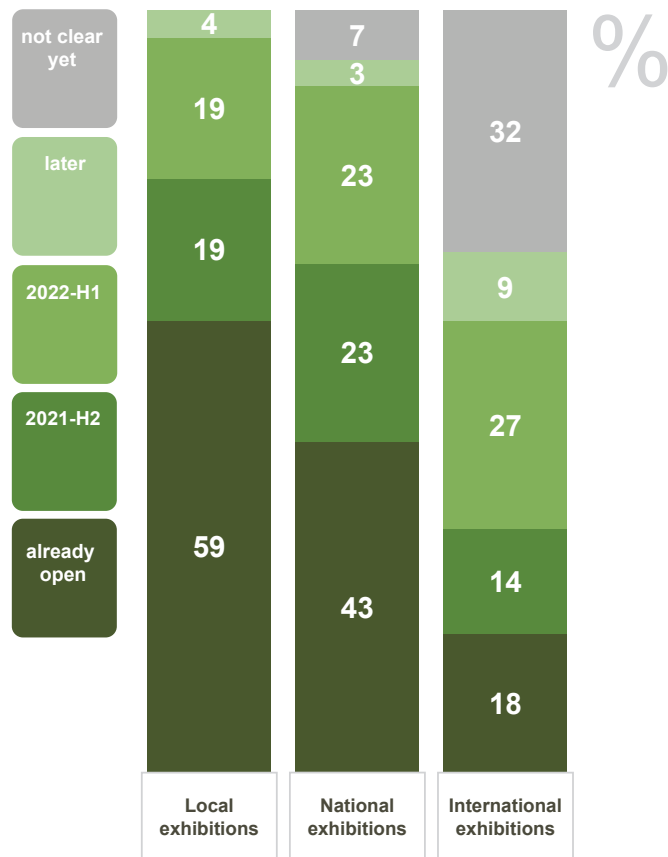


Situation of industry operations in 2021

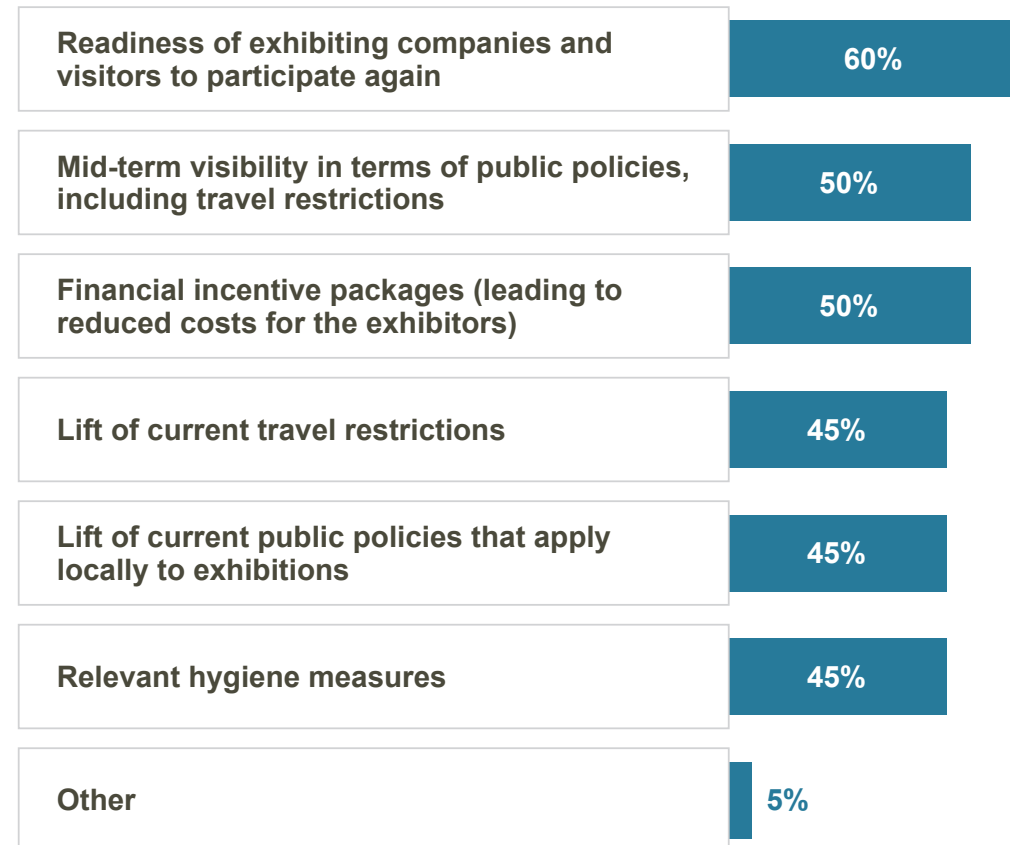




When do you believe exhibitions will open again in your city?

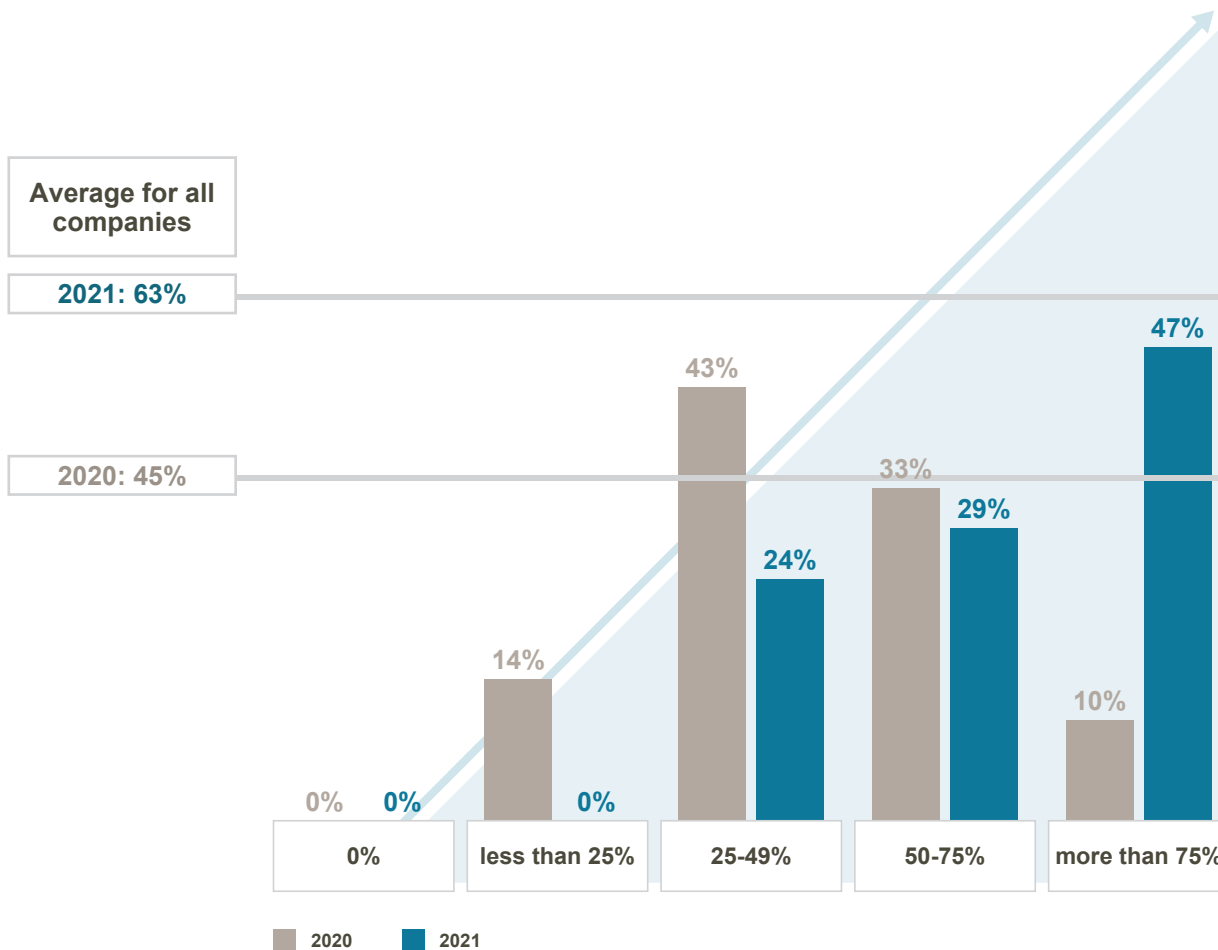


What do you believe would most help the “bounce back” of exhibitions?

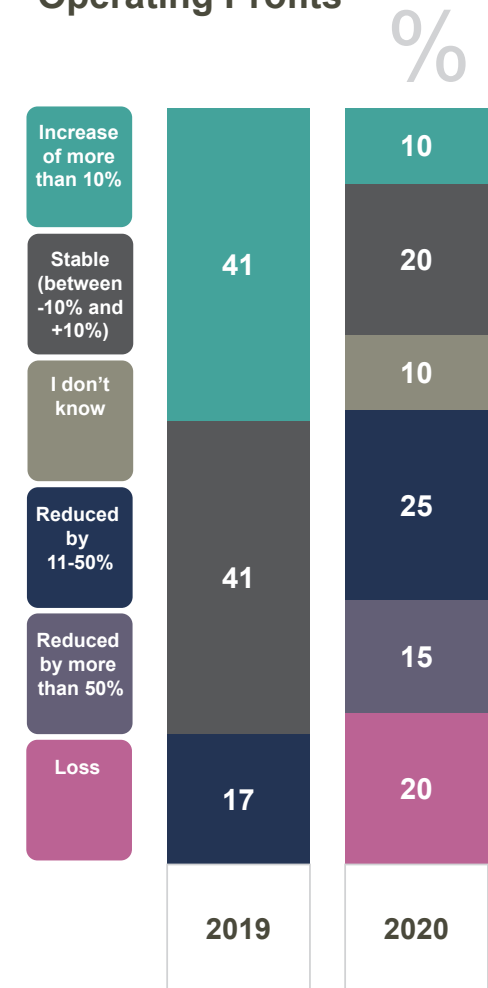




Revenue compared to 2019



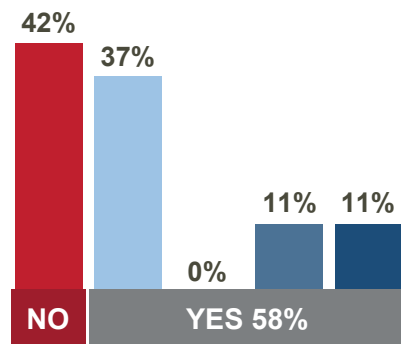
Operating Profits



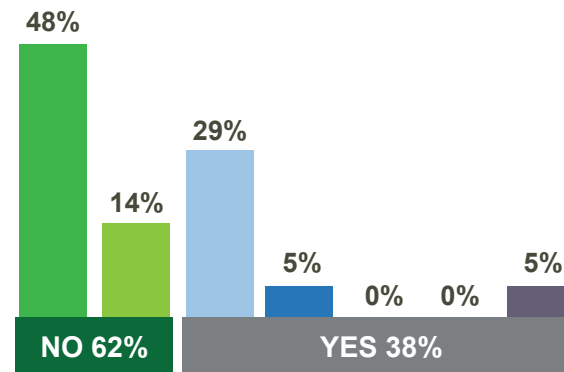
Detailed results for China



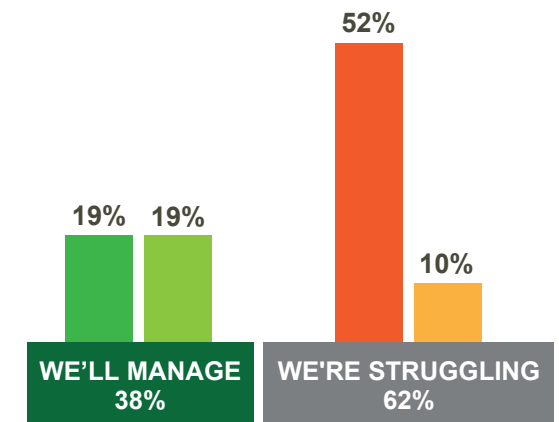
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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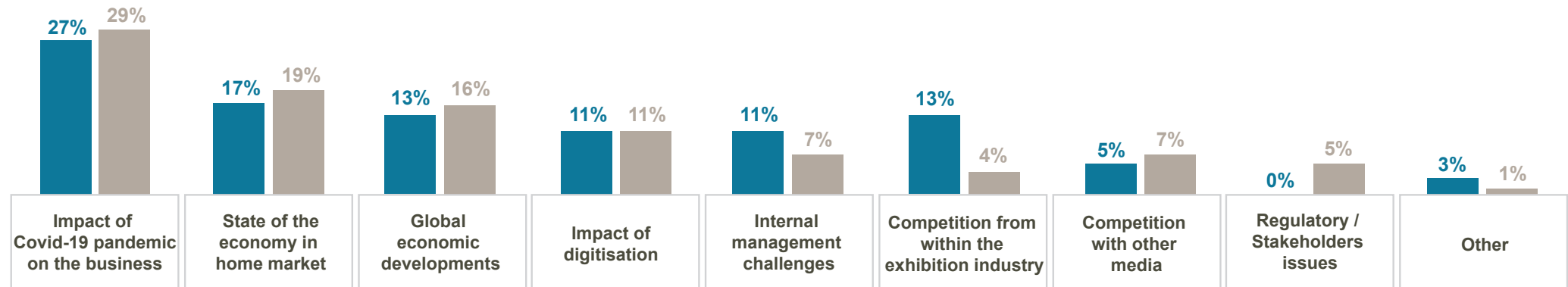
Detailed results for China



Most important business issues in the exhibition industry

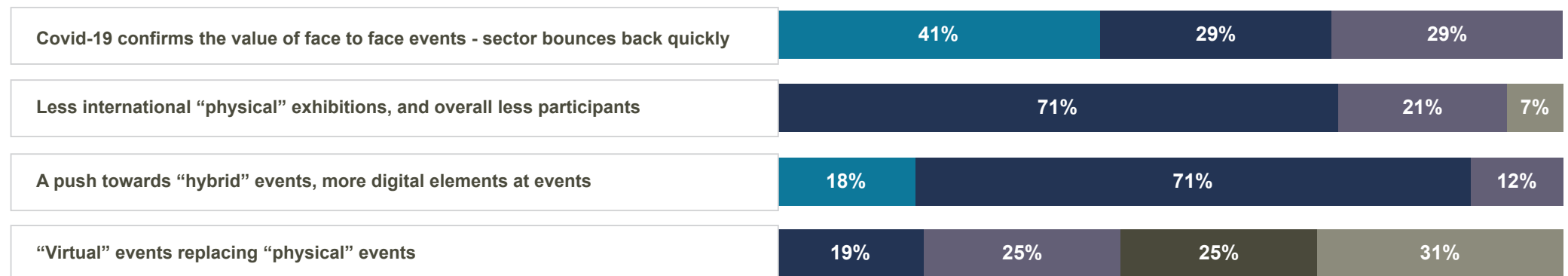
China

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

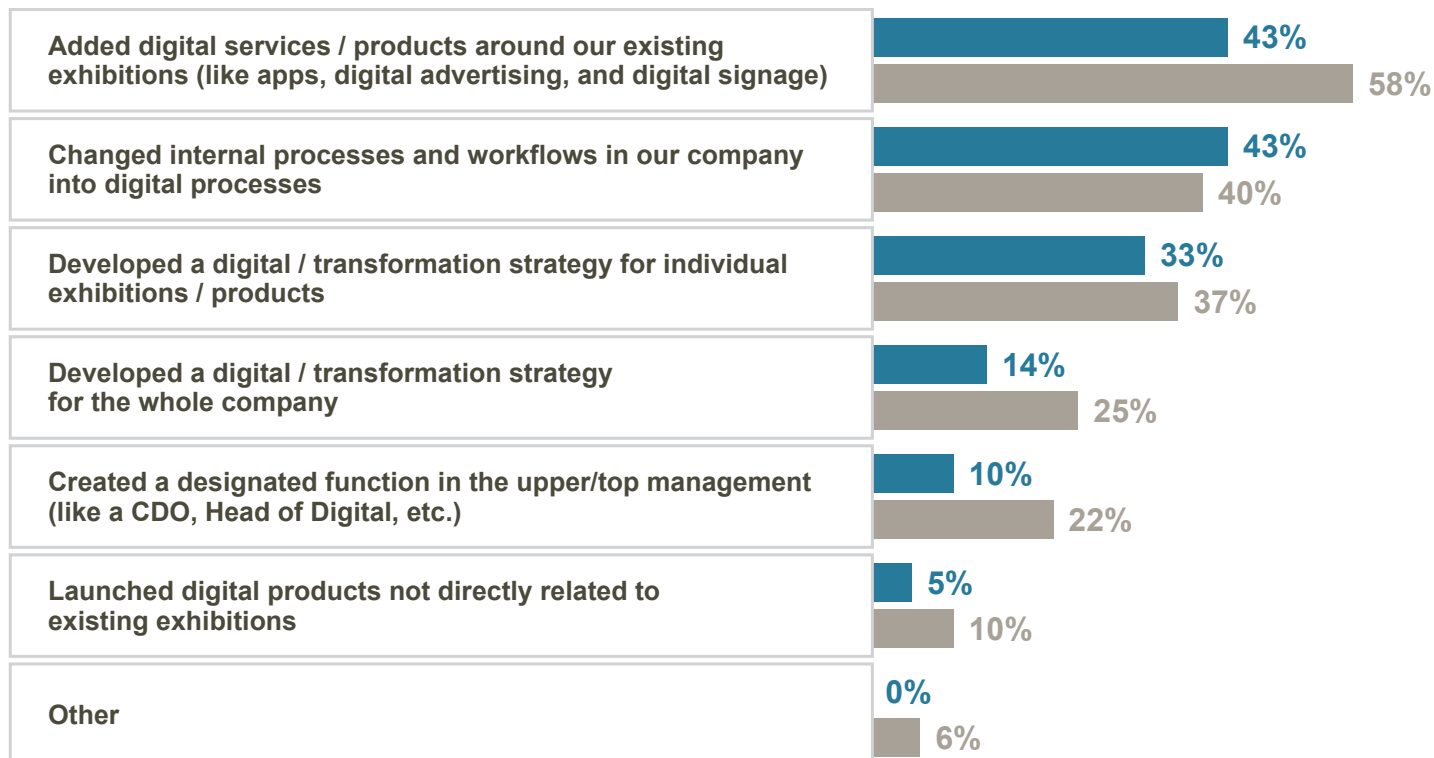




China

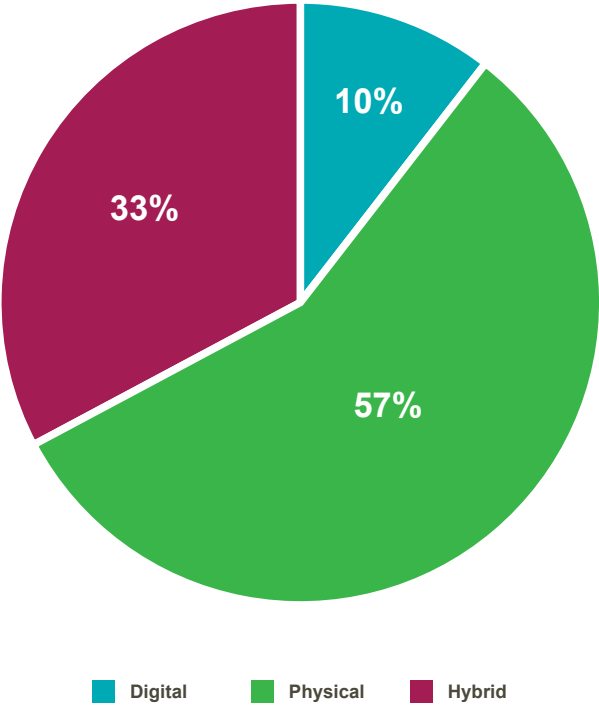
Global

Digitisation: implementation in China and globally

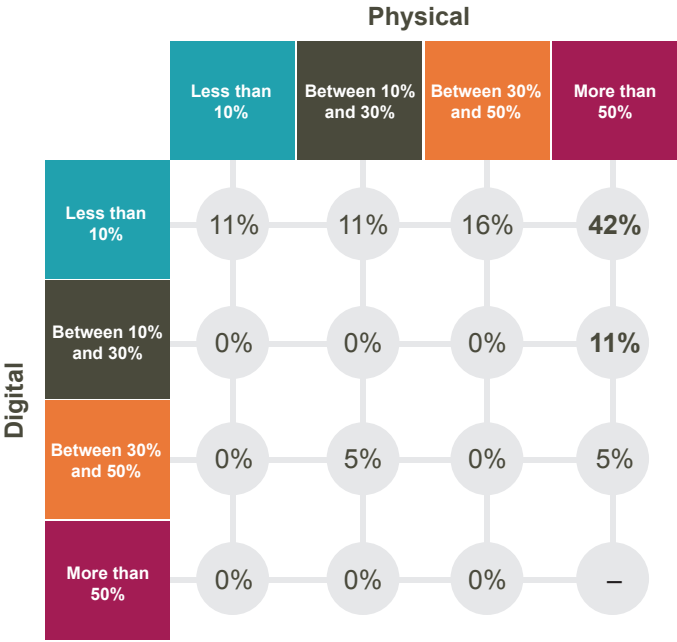


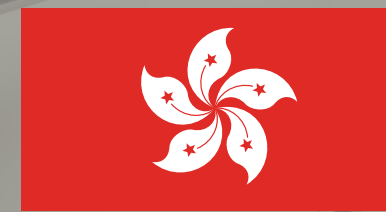


Number of fairs projected in 2021

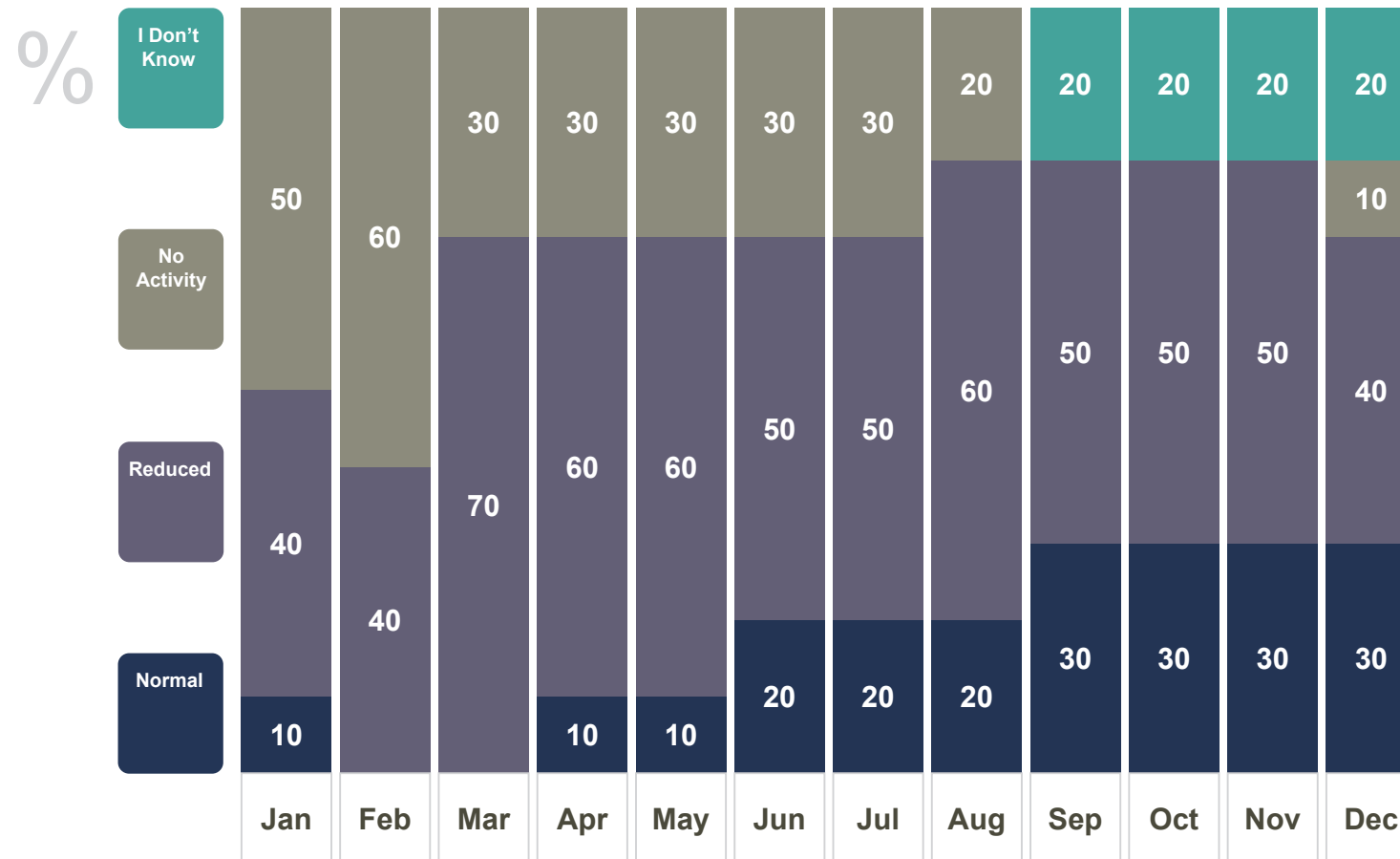


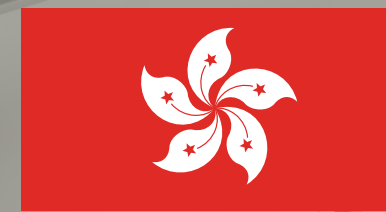
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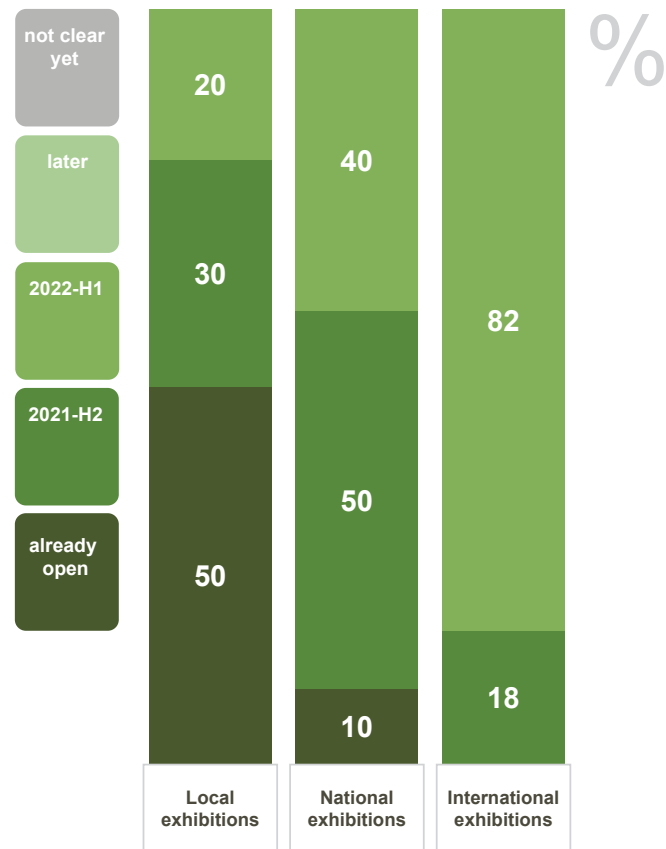


Situation of industry operations in 2021

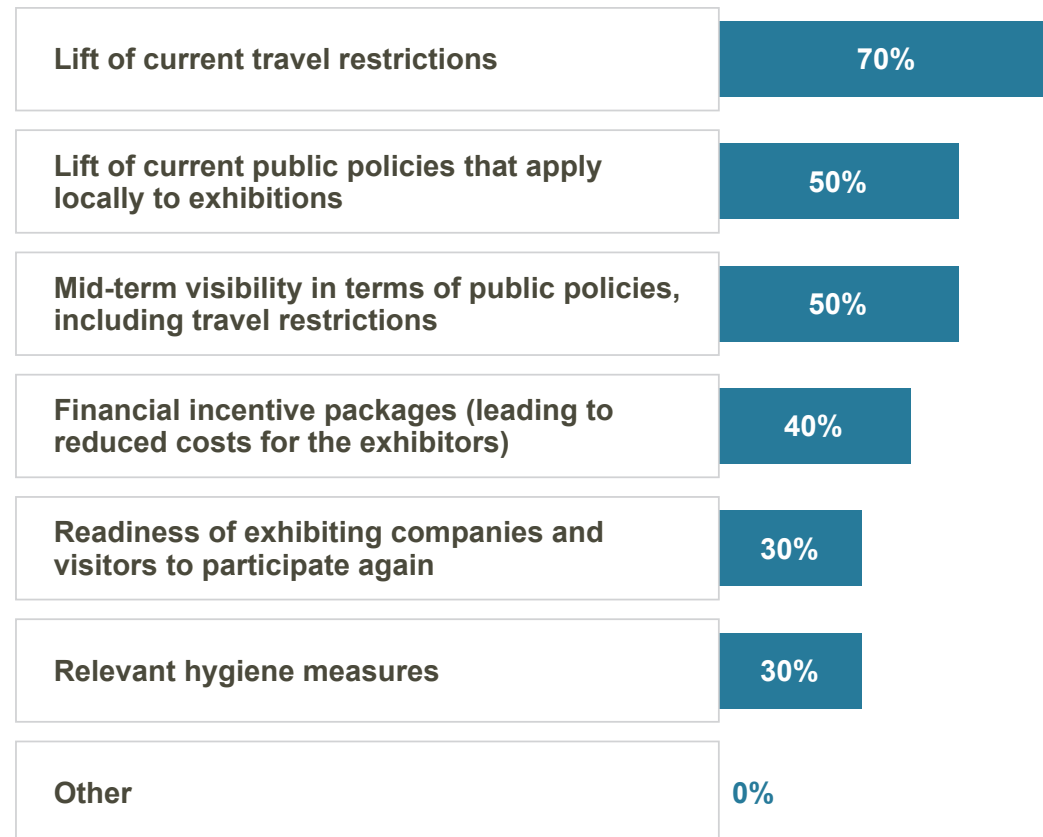


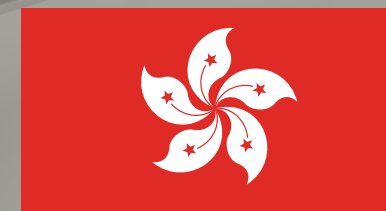


When do you believe exhibitions will open again in your city?

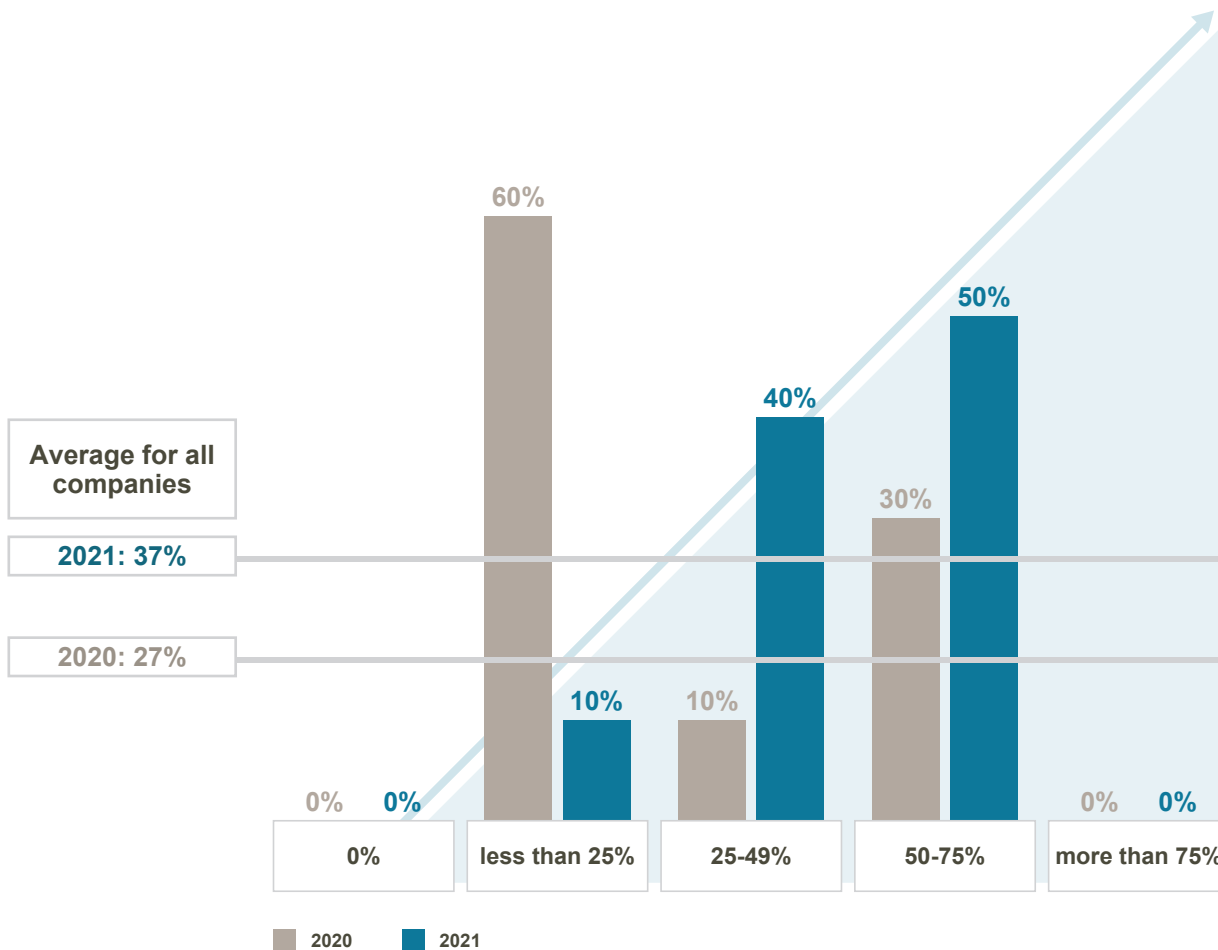


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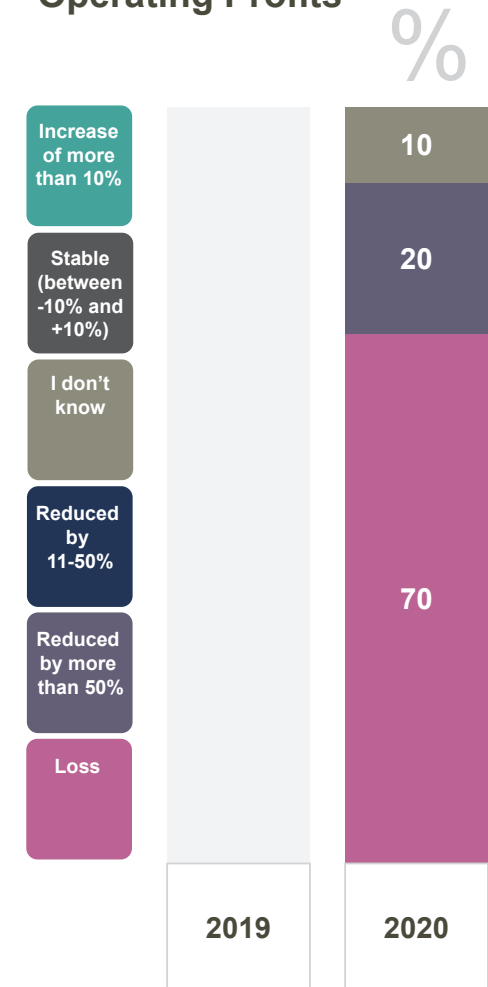


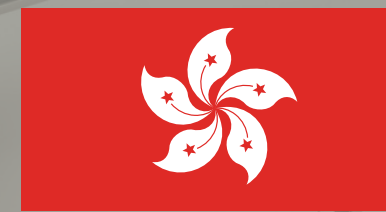


Revenue compared to 2019

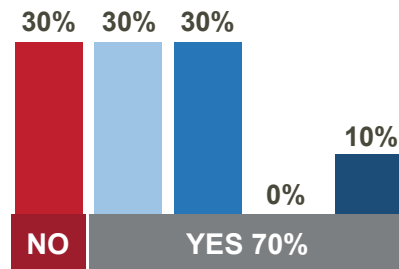


Operating Profits

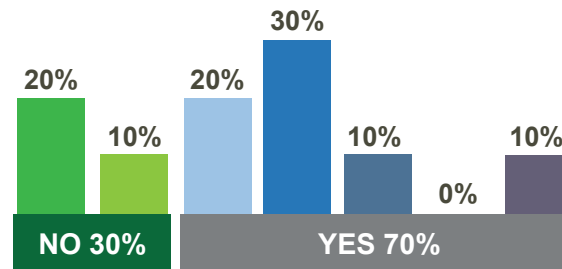




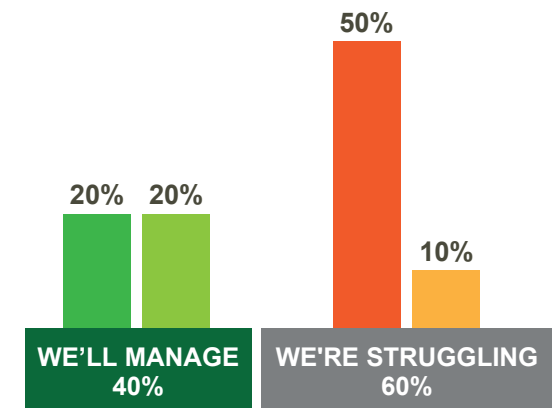
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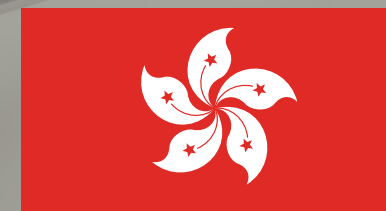


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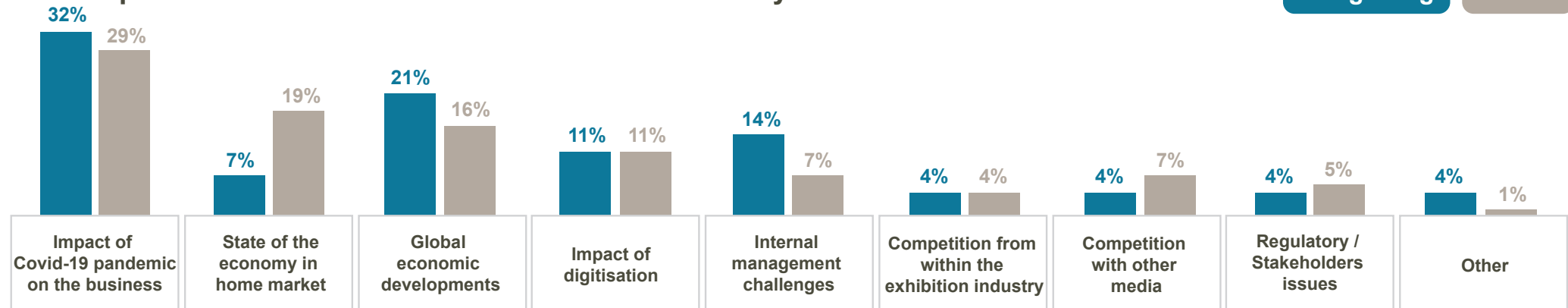
Detailed results for Hong Kong



Most important business issues in the exhibition industry

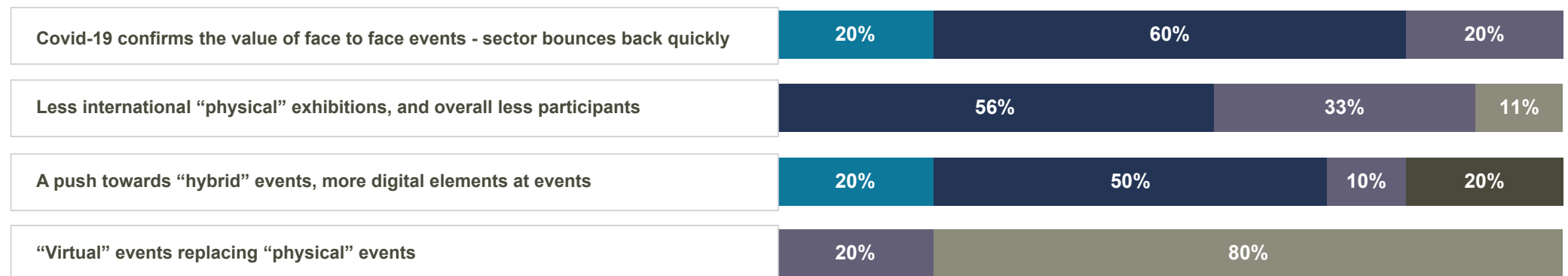
Hong Kong

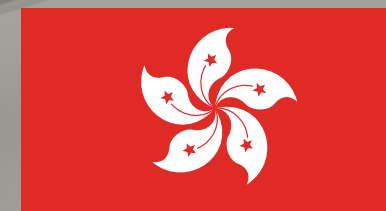
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

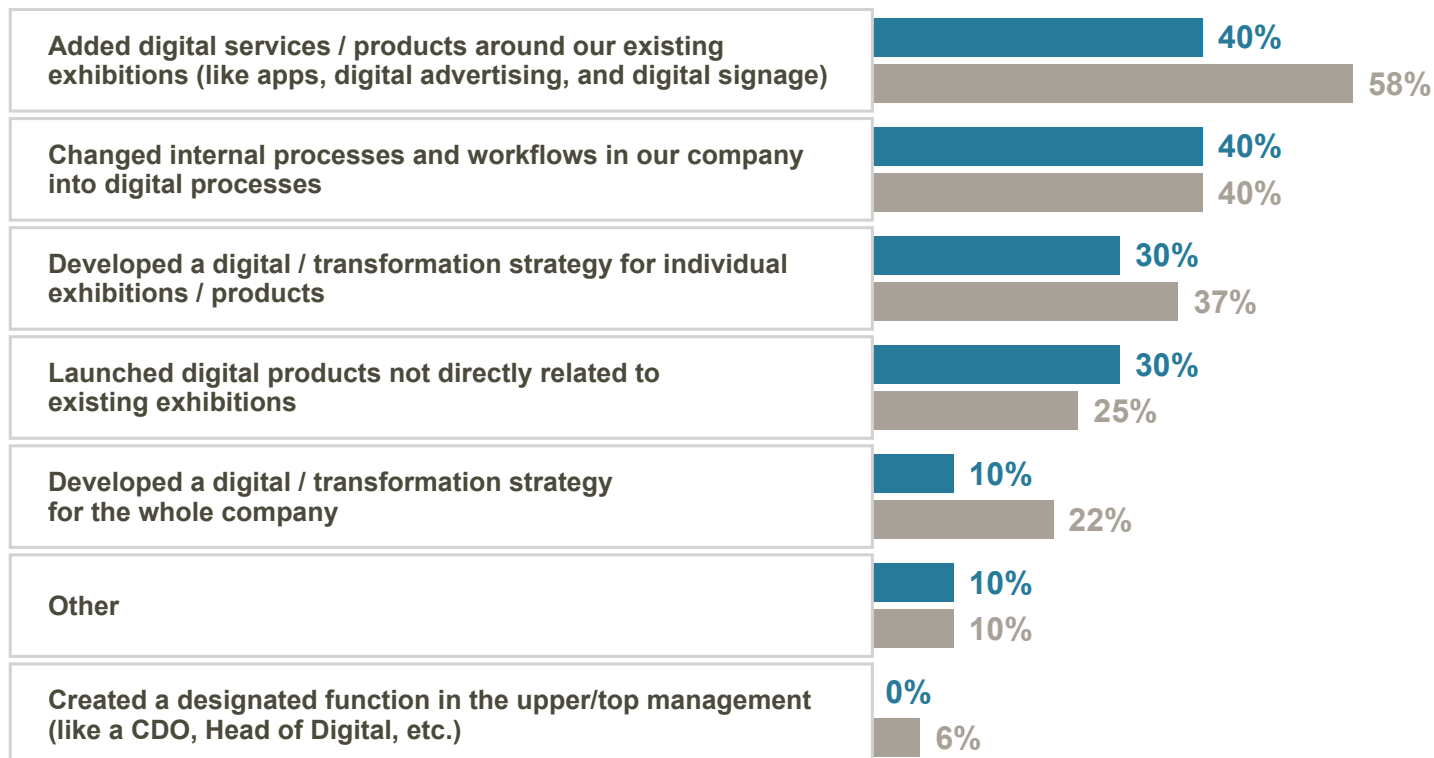


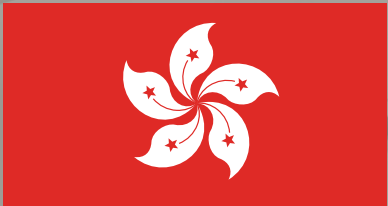


Hong Kong

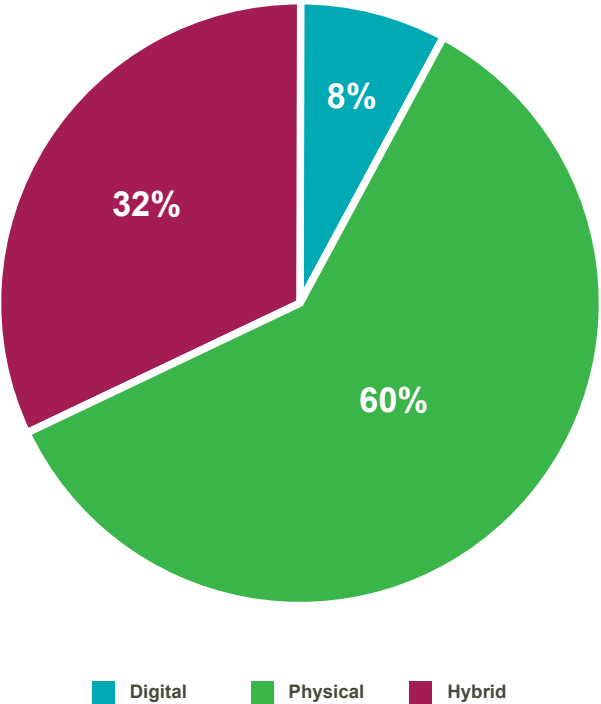
Global

Digitisation: implementation in Hong Kong and globally

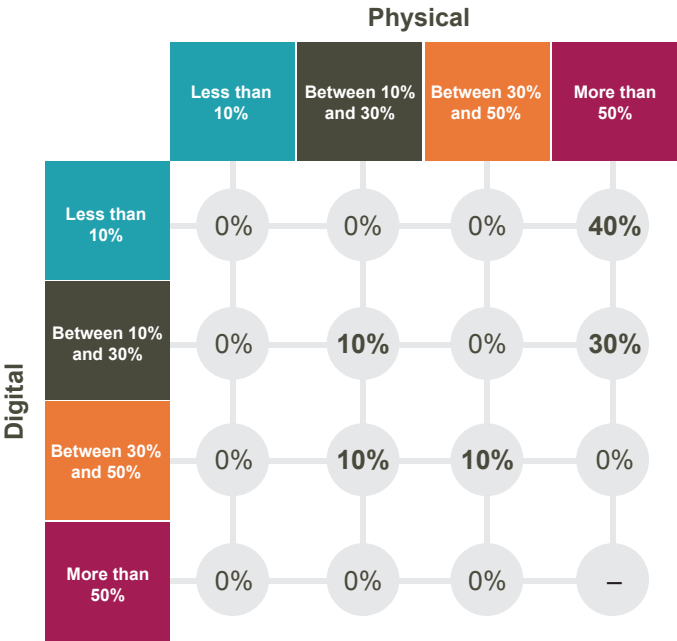




Number of fairs projected in 2021

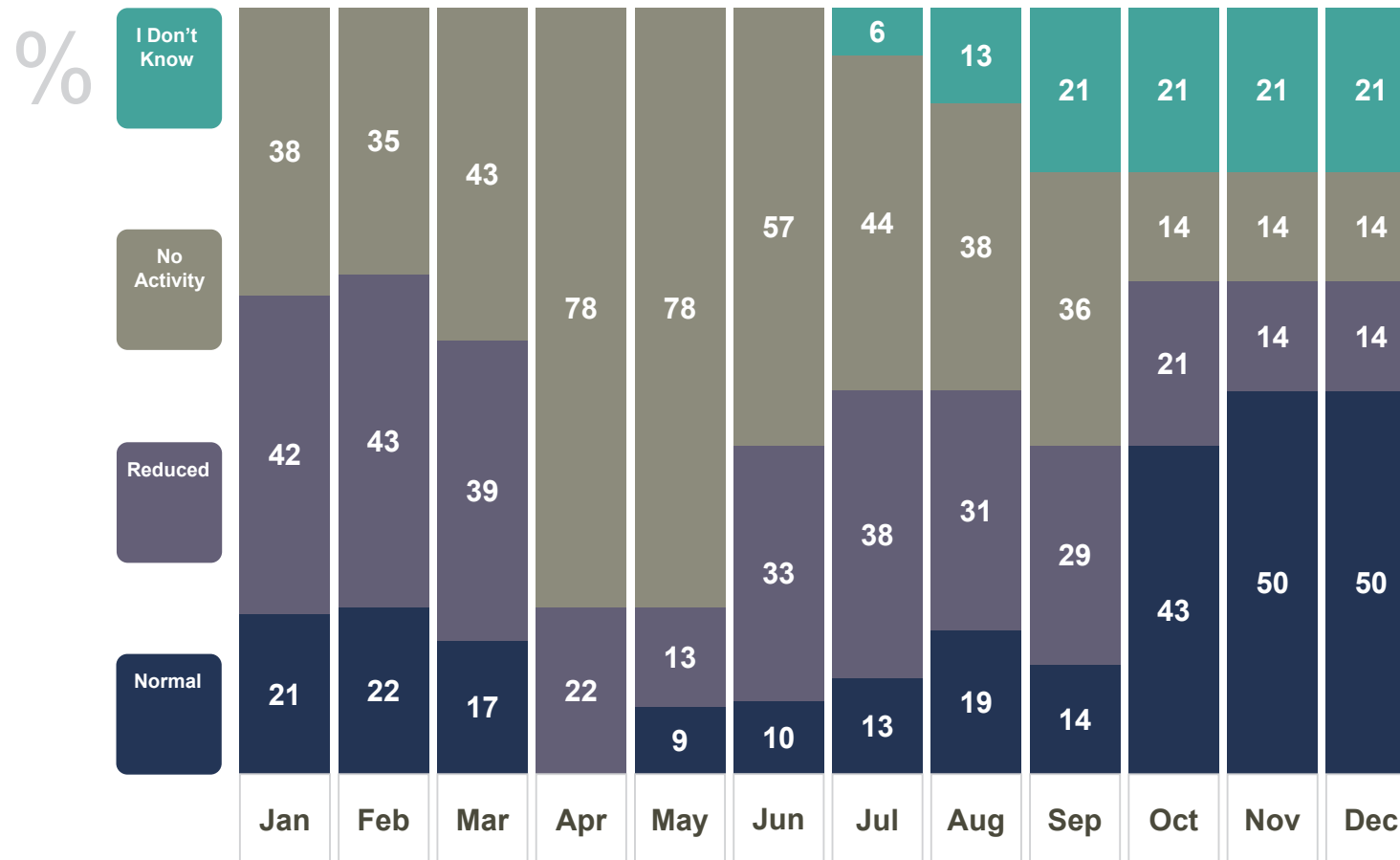


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



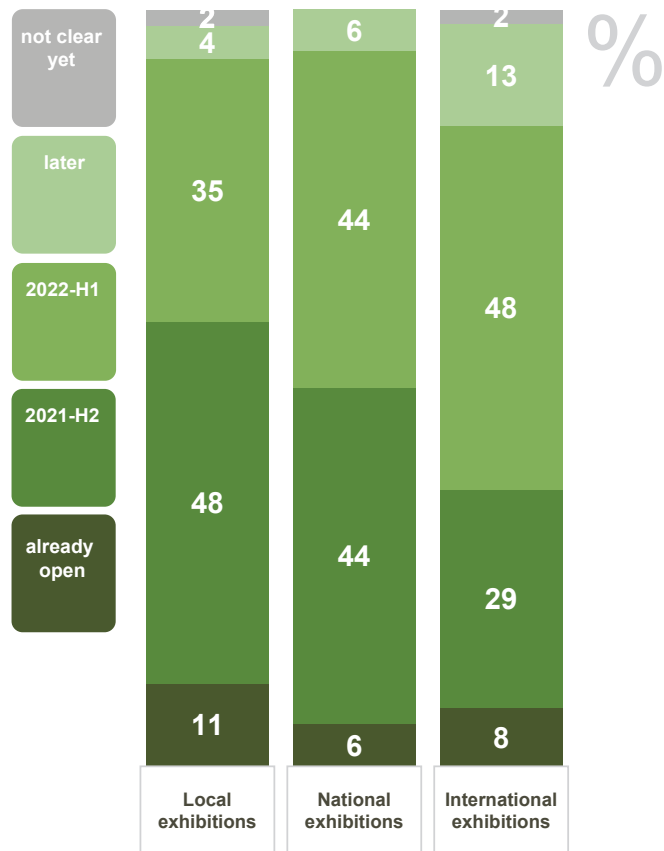


Situation of industry operations in 2021

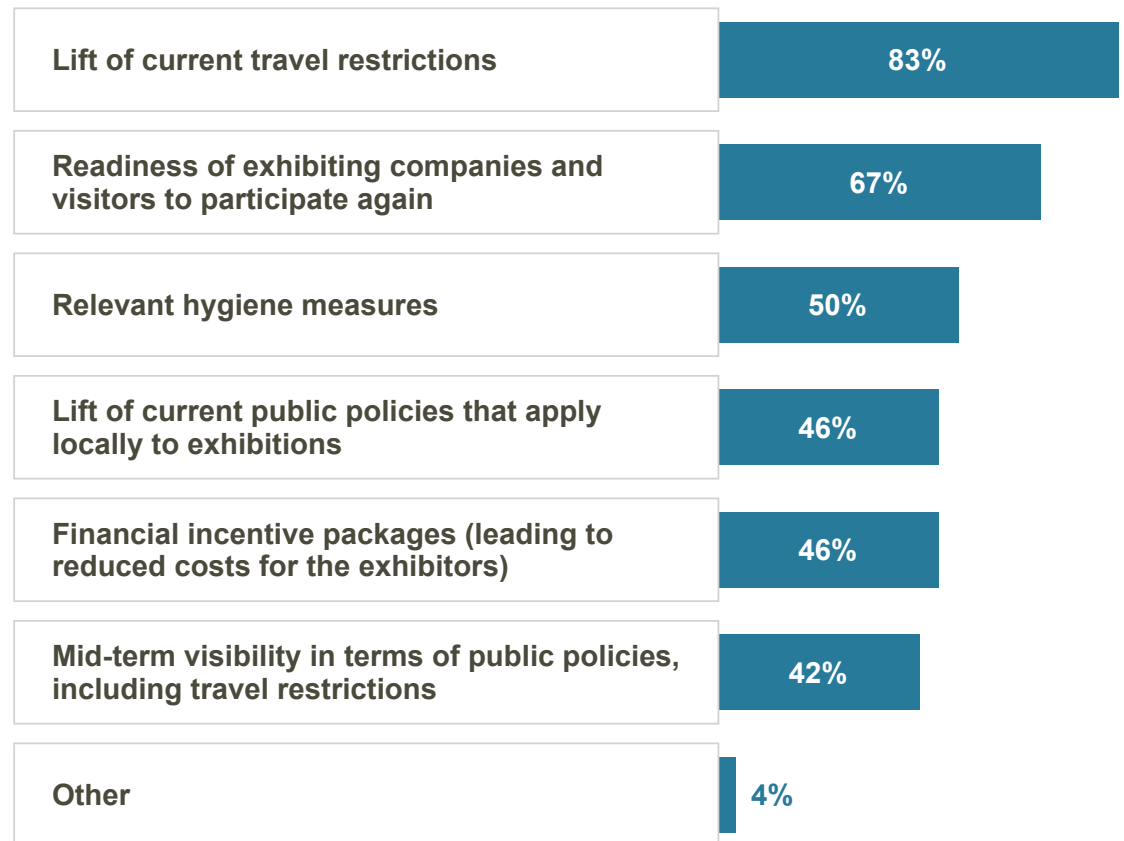




When do you believe exhibitions will open again in your city?



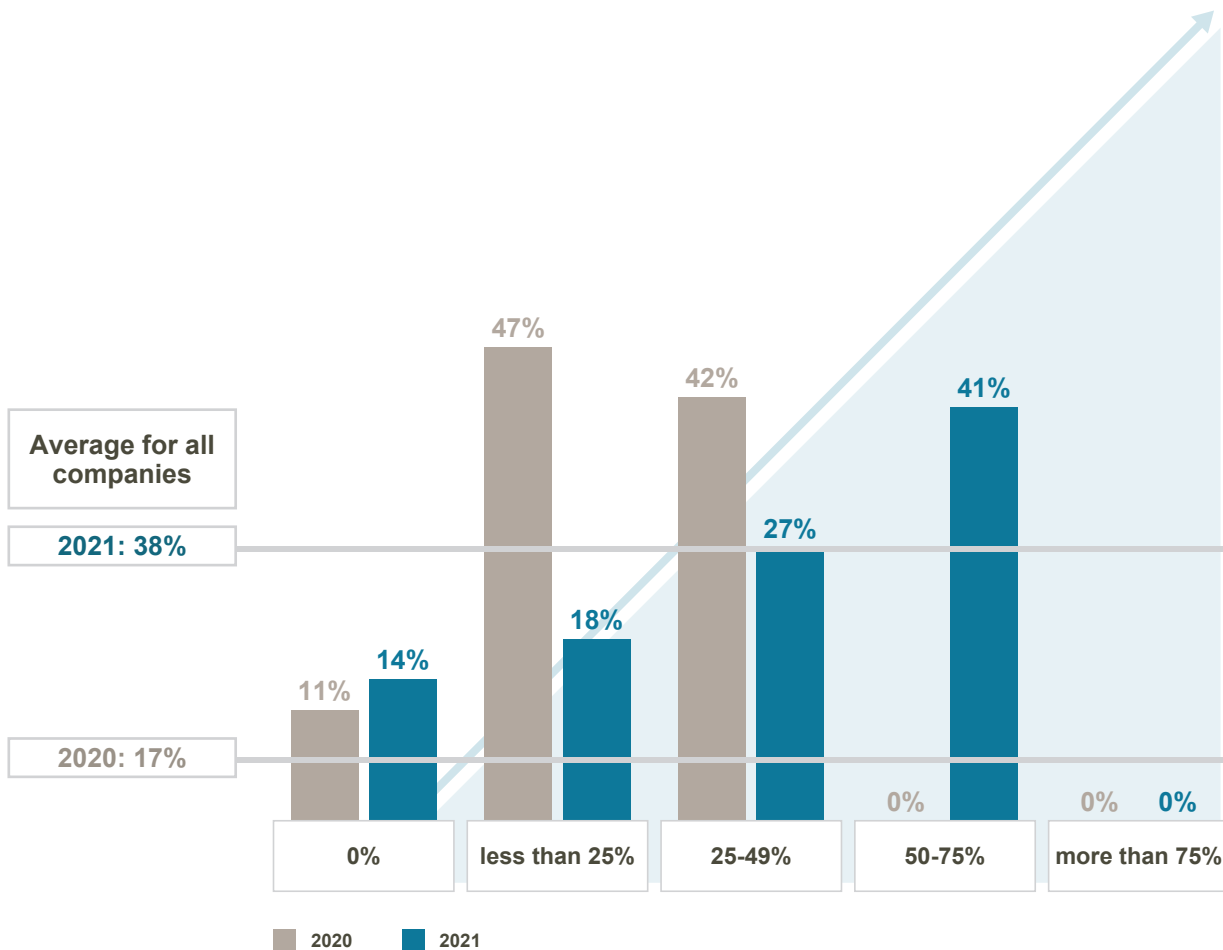
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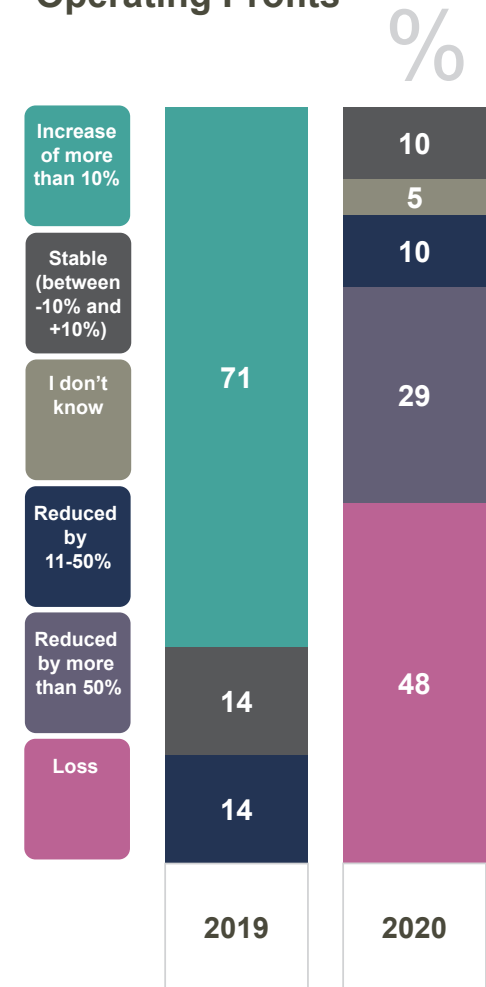
Detailed results for India



Revenue compared to 2019



Operating Profits



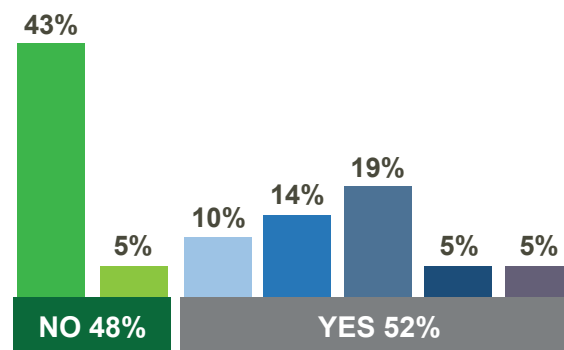
Detailed results for India



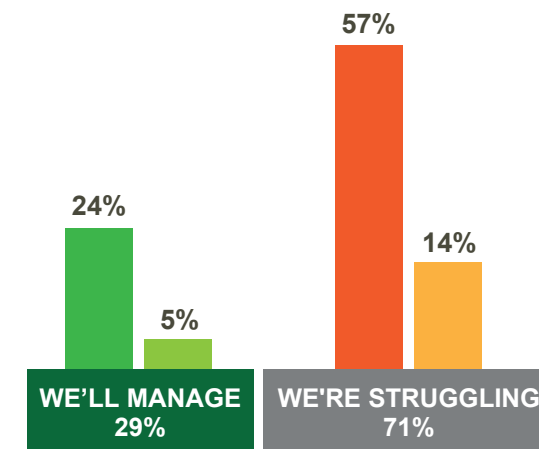
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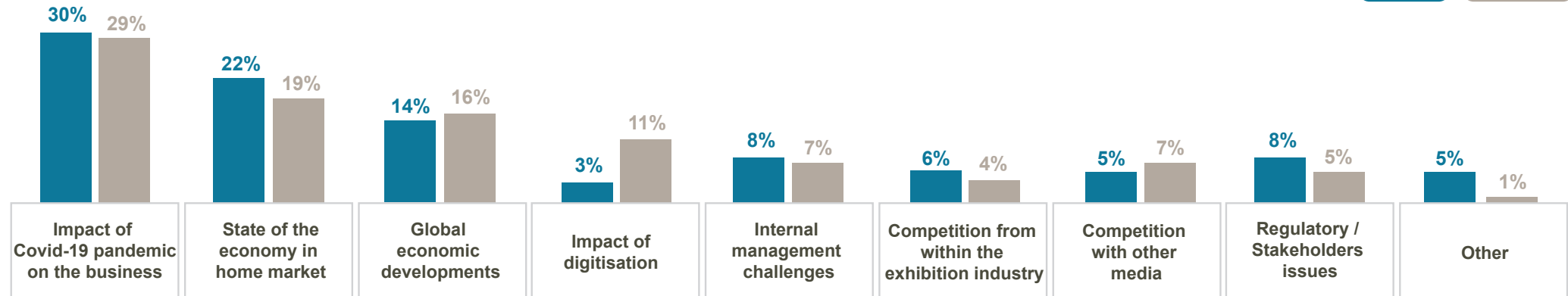
Detailed results for India



Most important business issues in the exhibition industry

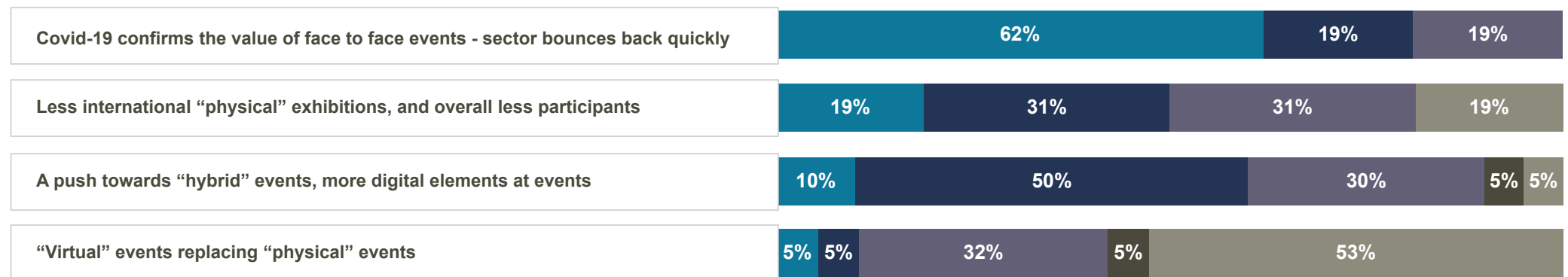
India

Global



Format of exhibitions in the coming years

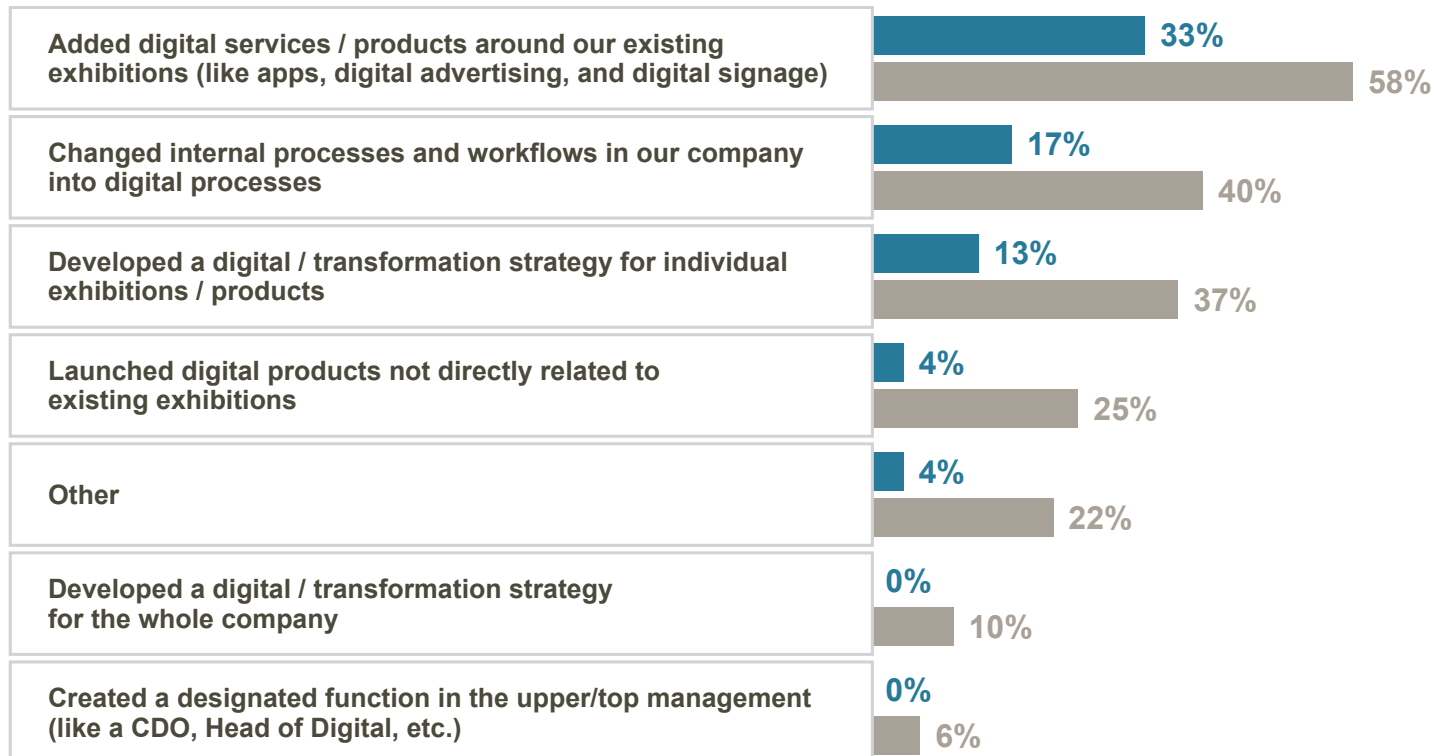
Yes, for sure Most probably Not sure Not sure at all Definitely not





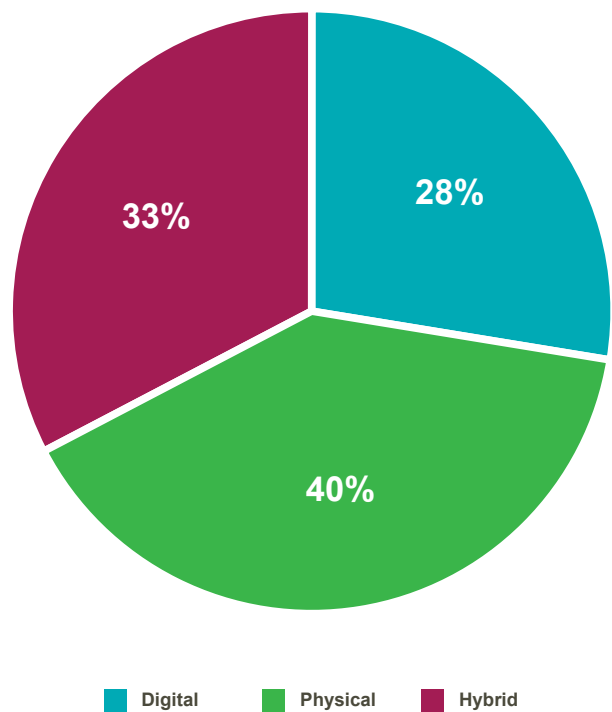
India Global

Digitisation: implementation in India and globally

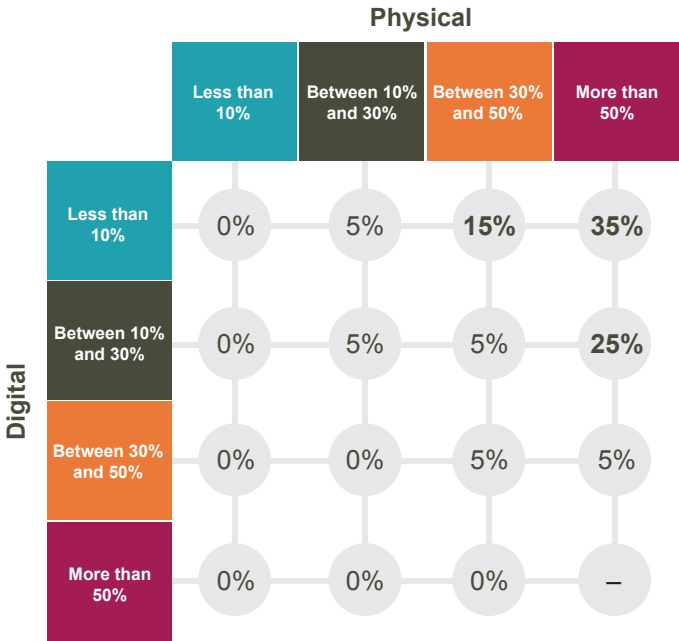


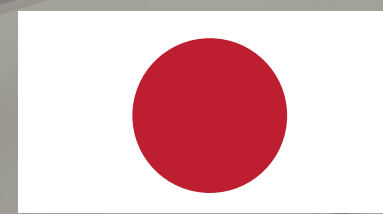


Number of fairs projected in 2021

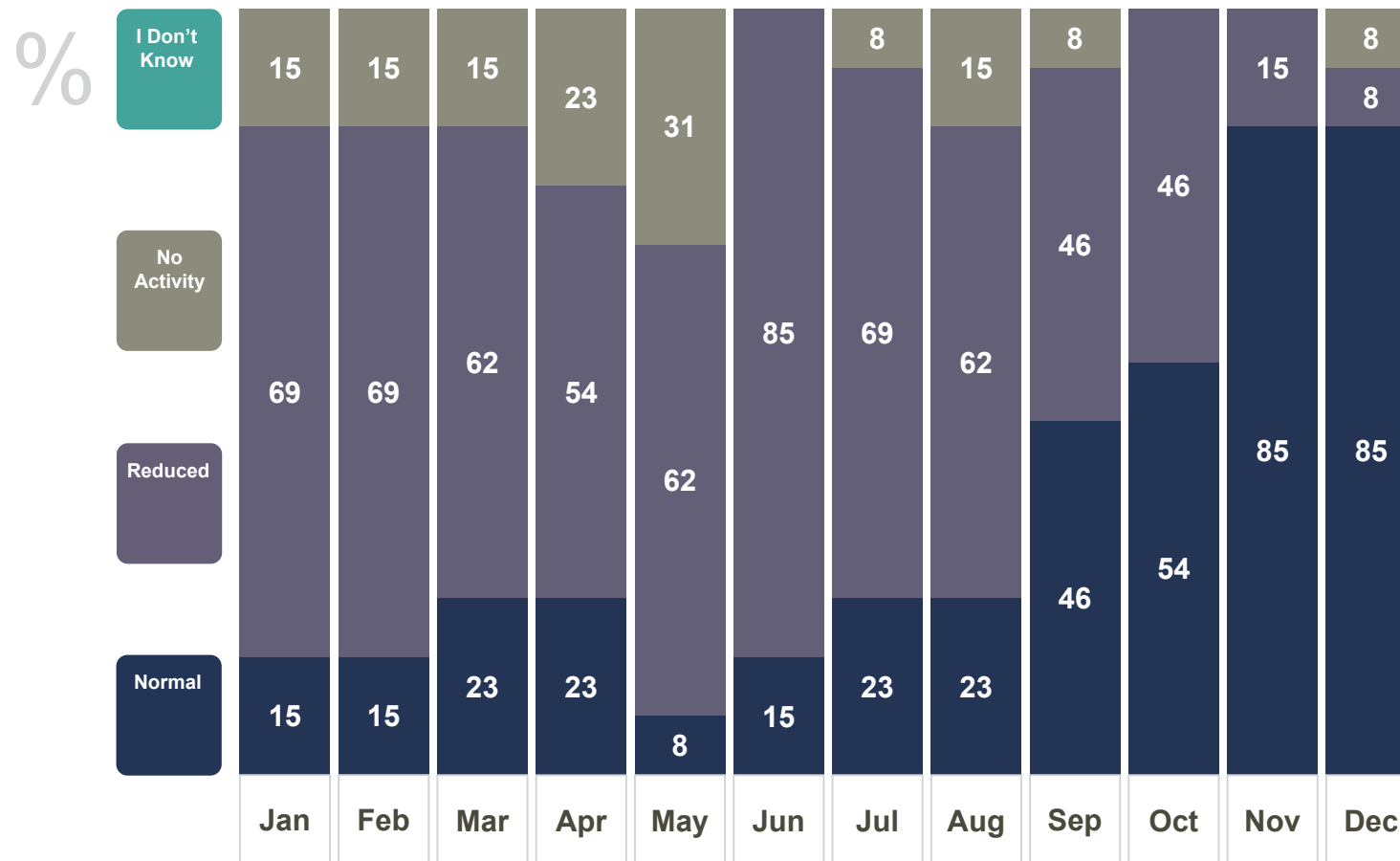


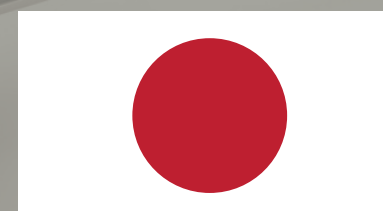
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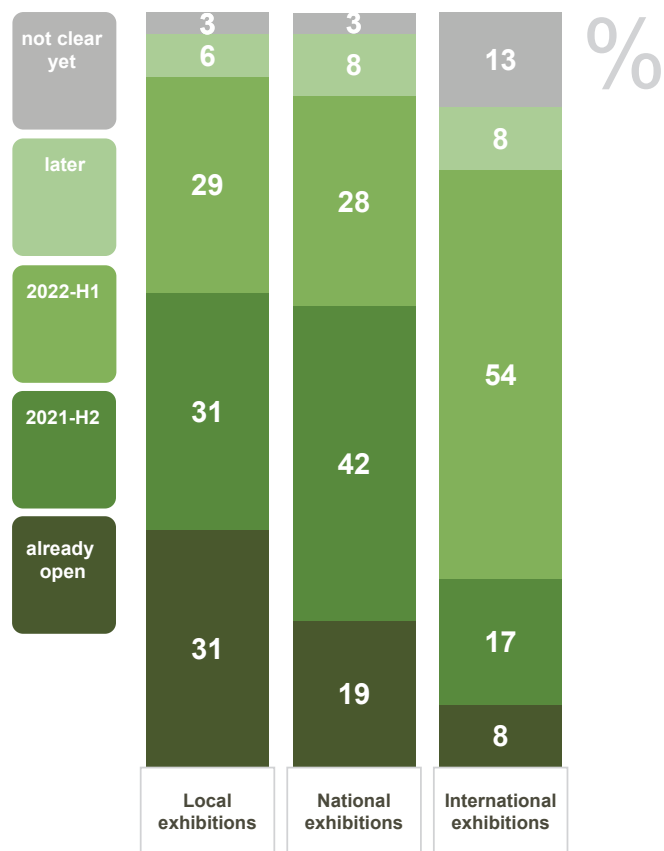


Situation of industry operations in 2021

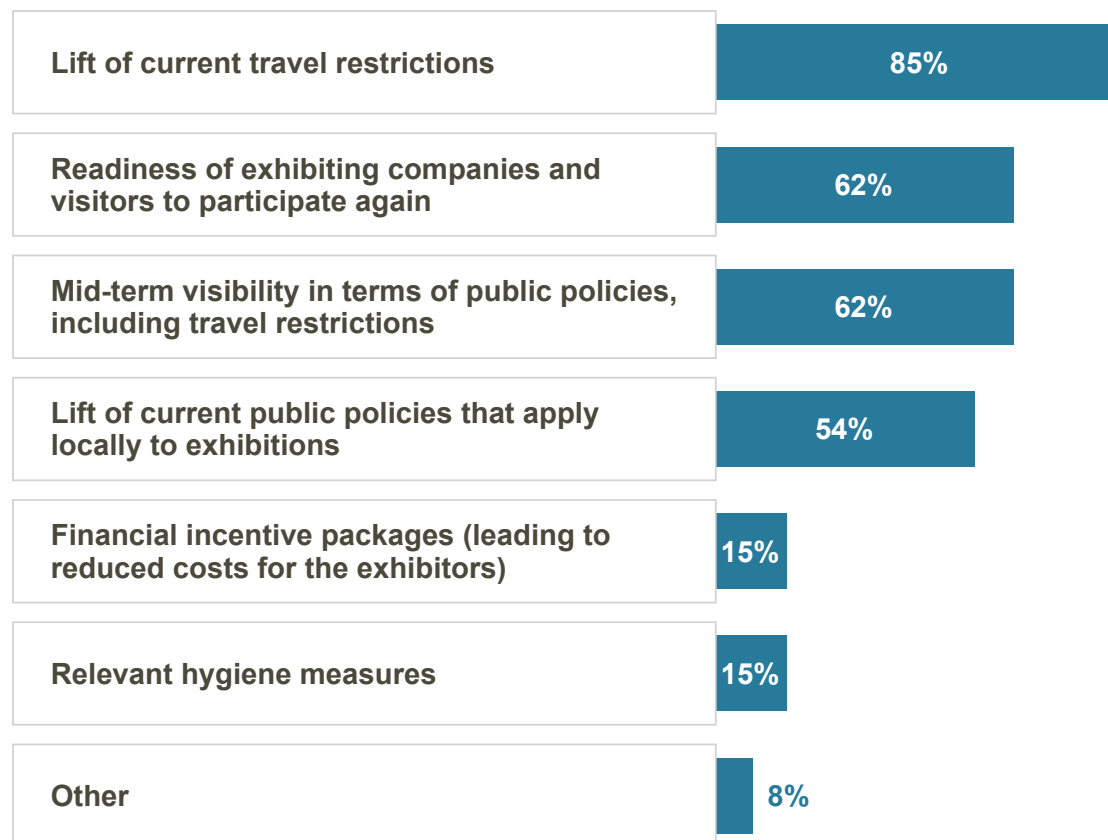


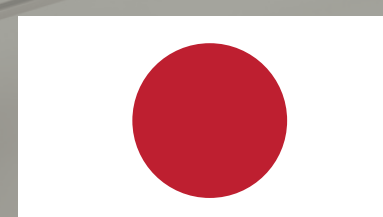


When do you believe exhibitions will open again in your city?

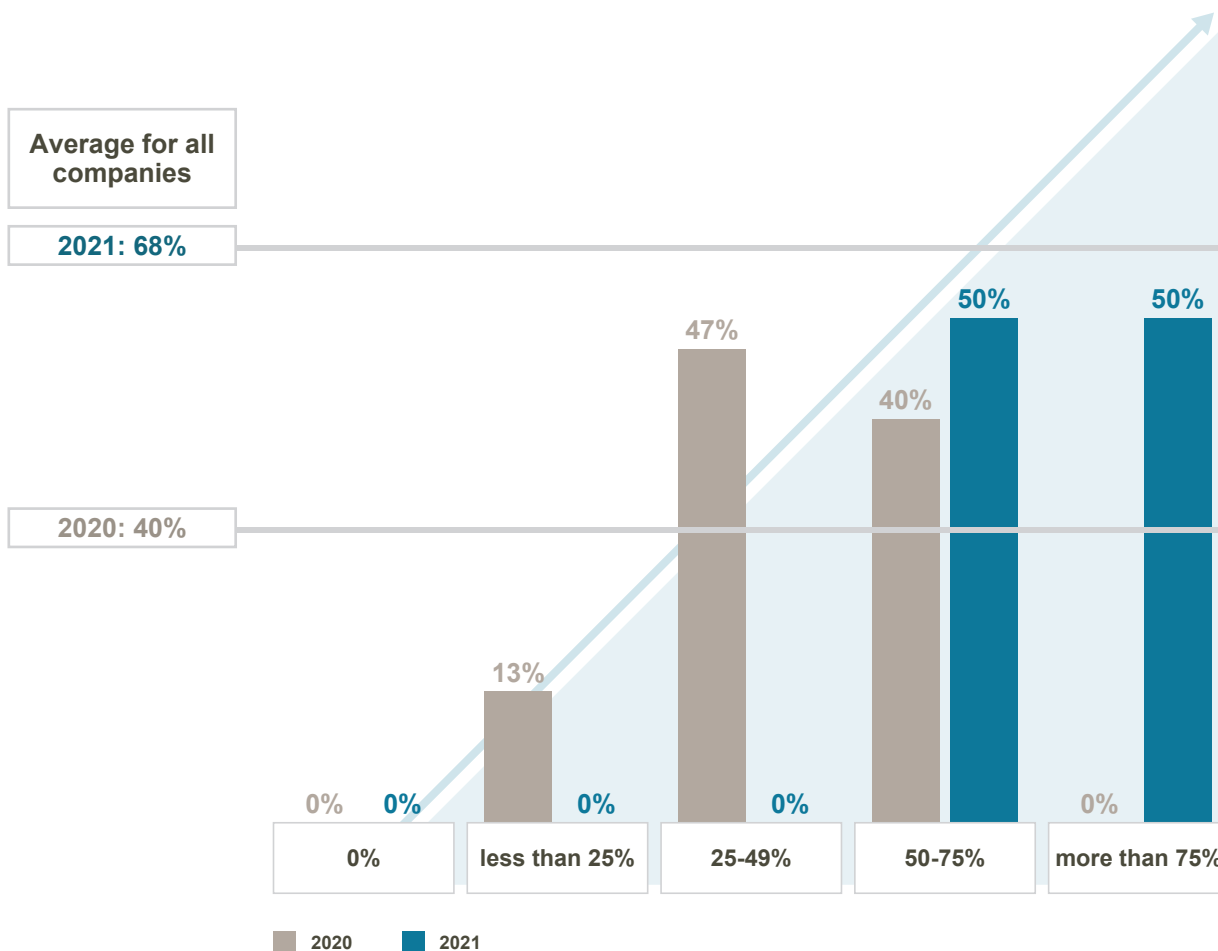


What do you believe would most help the “bounce back” of exhibitions?

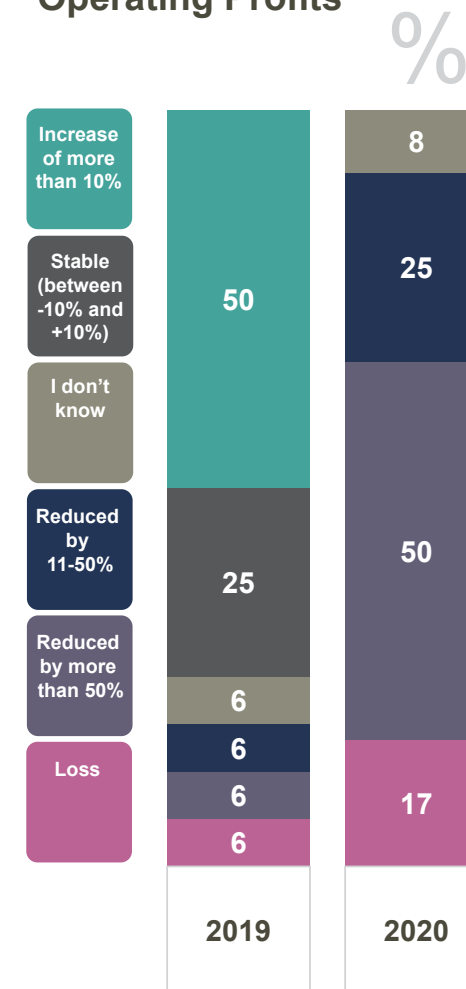




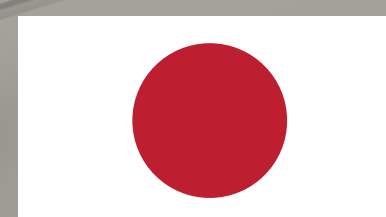
Revenue compared to 2019



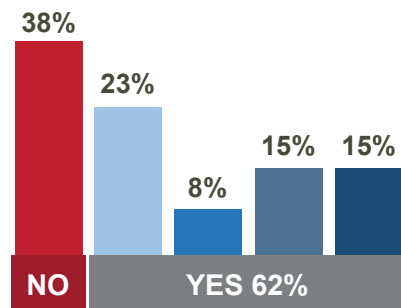
Operating Profits



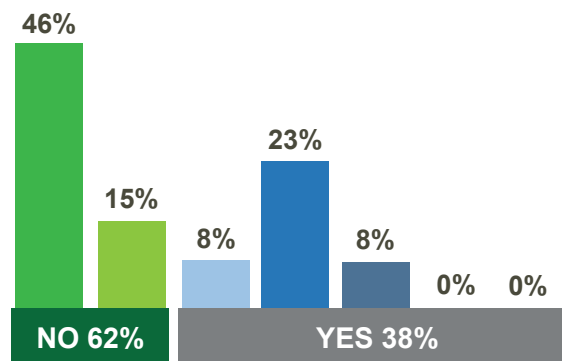
Detailed results for Japan



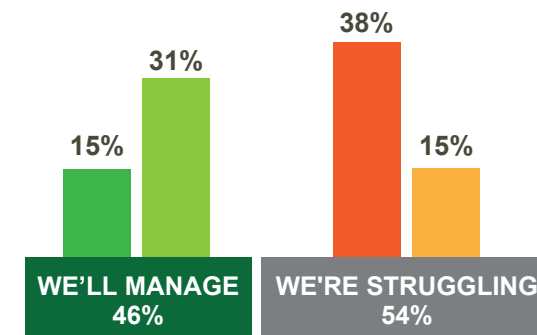
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?

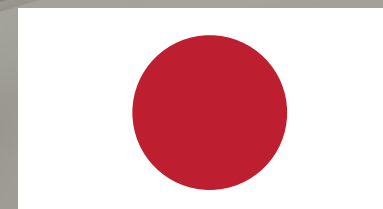


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

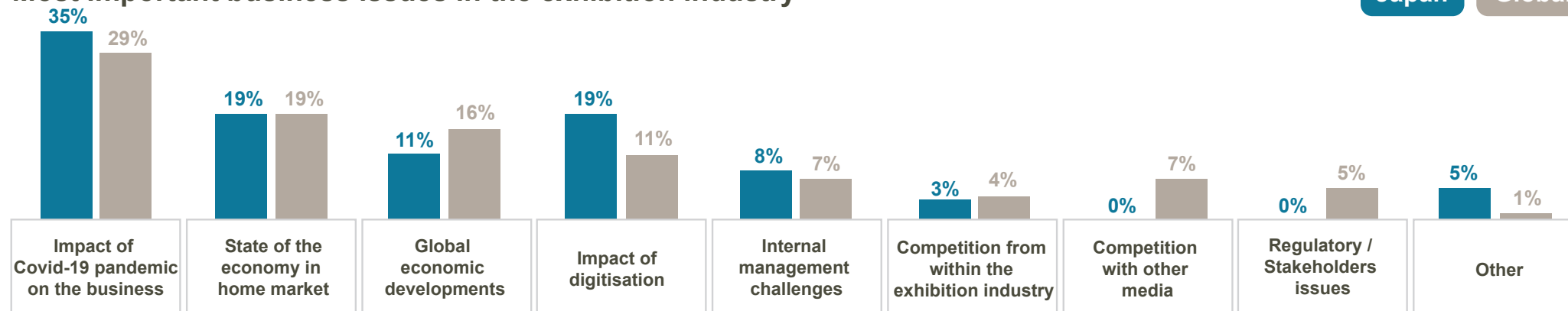
Detailed results for Japan



Most important business issues in the exhibition industry

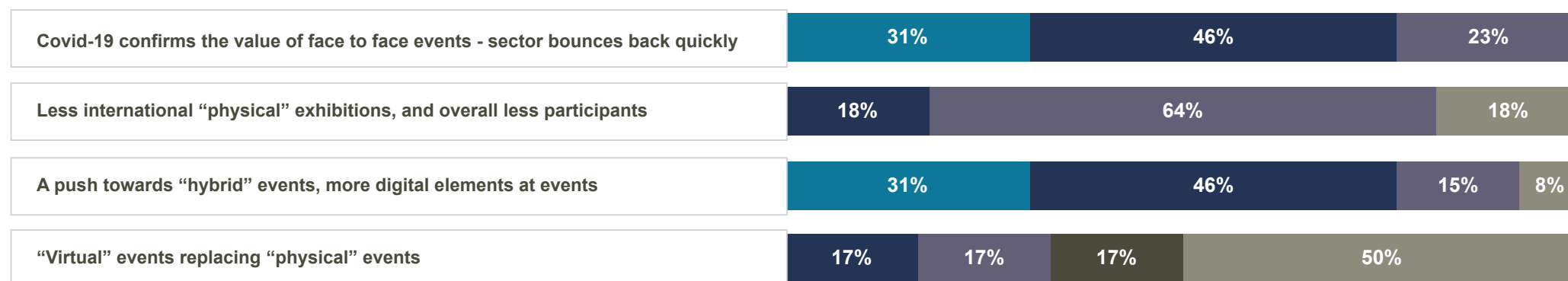
Japan

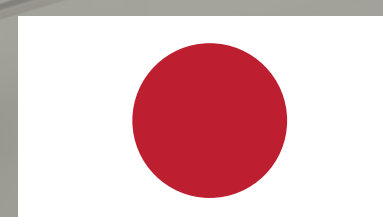
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

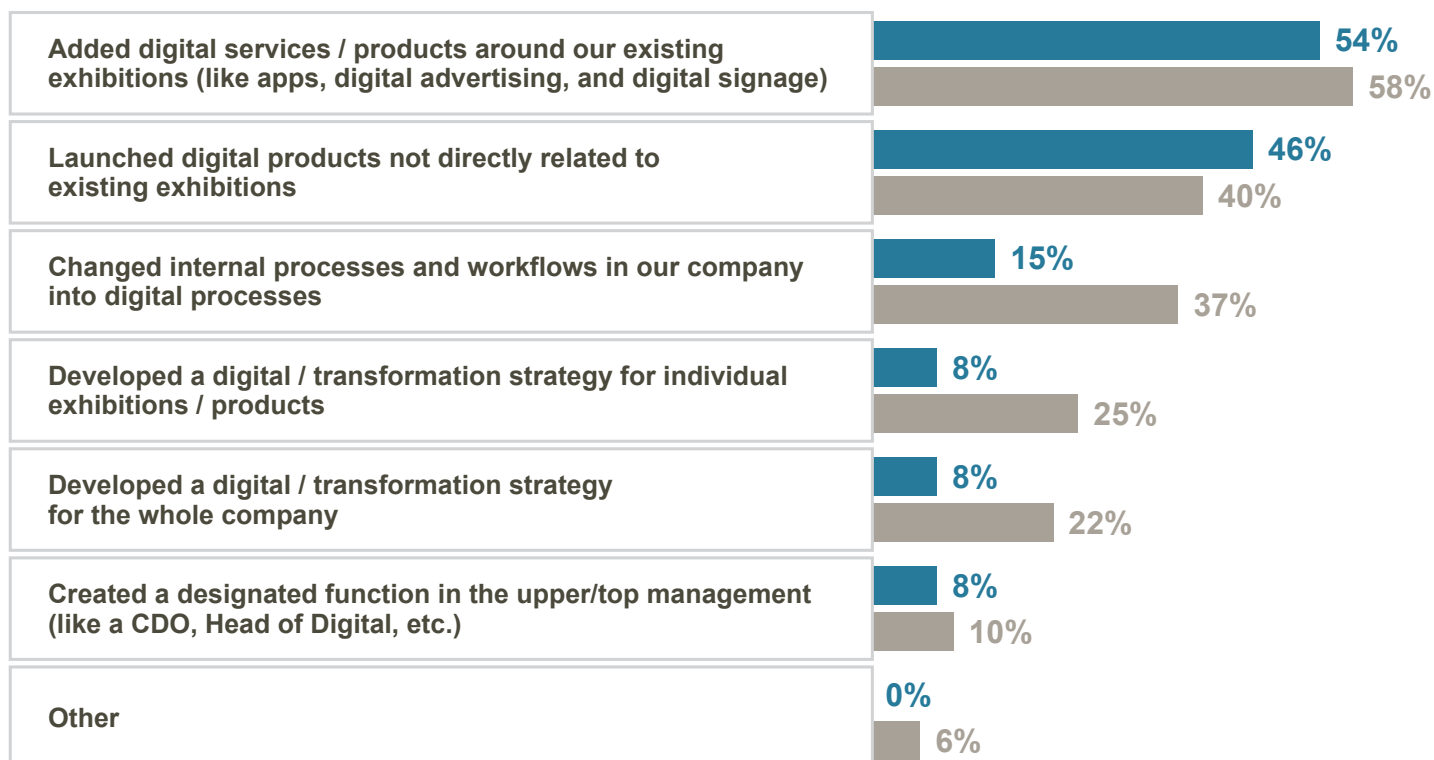


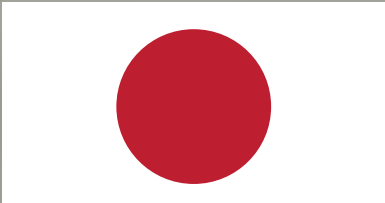


Japan

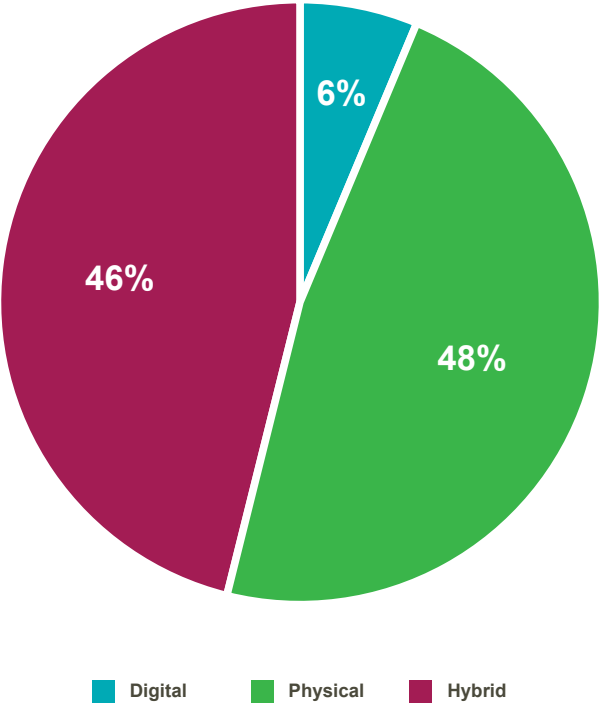
Global

Digitisation: implementation in Japan and globally

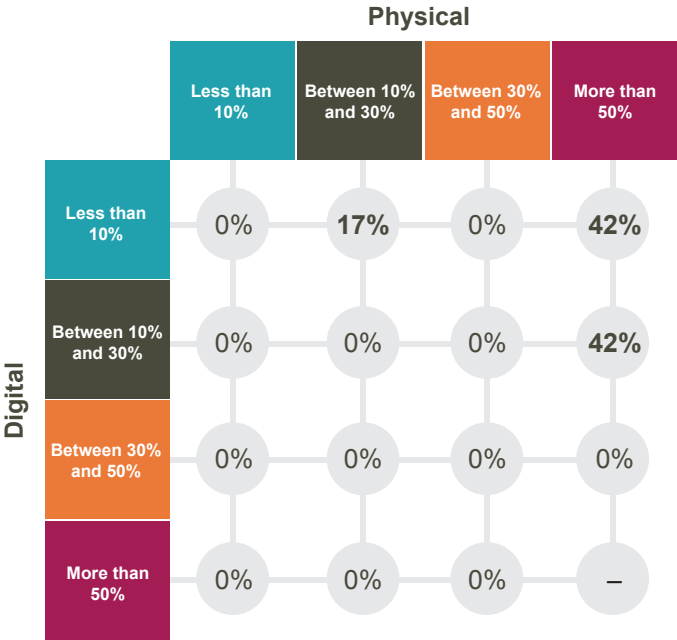


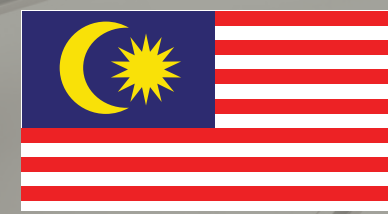


Number of fairs projected in 2021

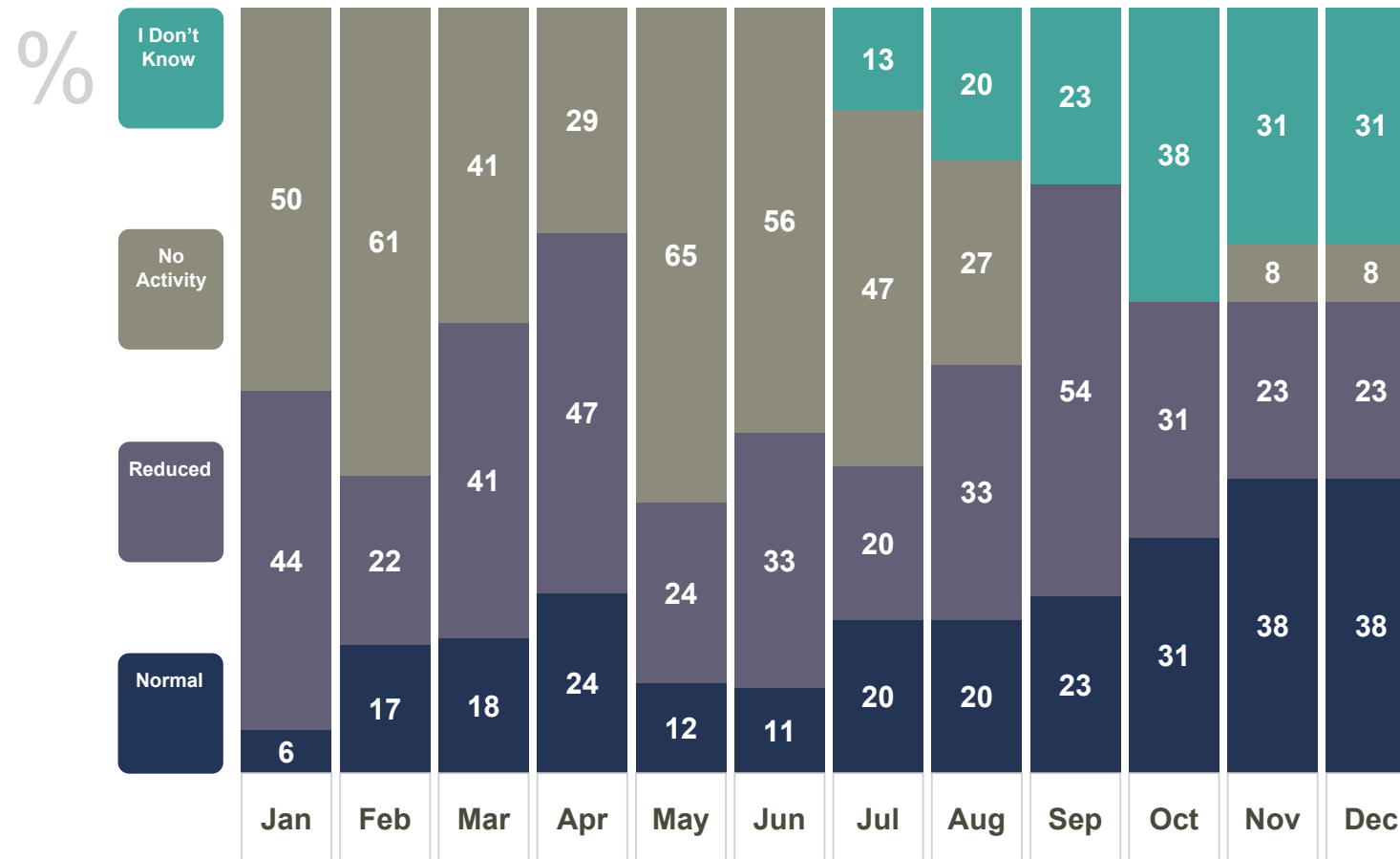


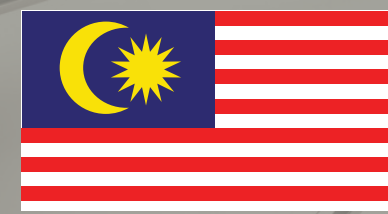
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



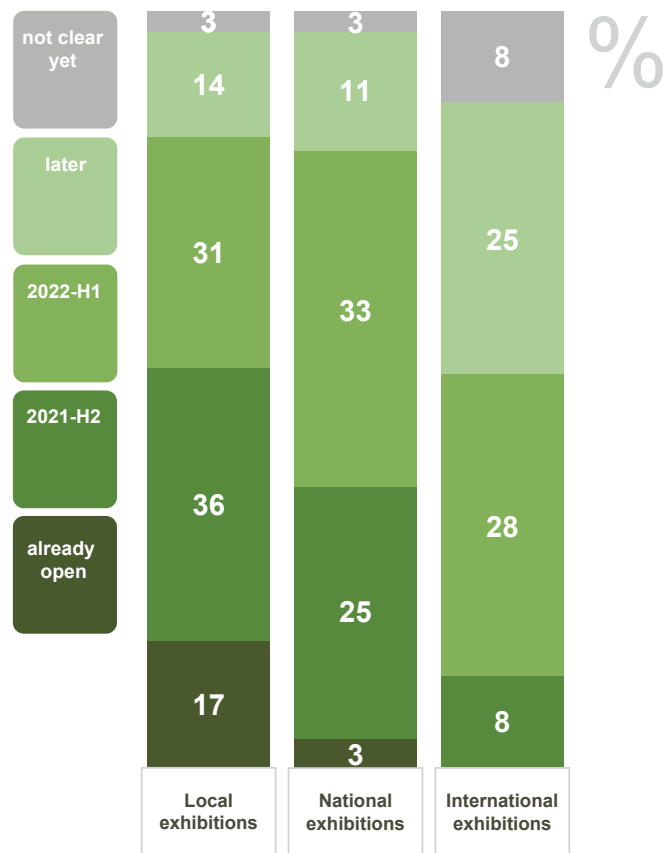


Situation of industry operations in 2021

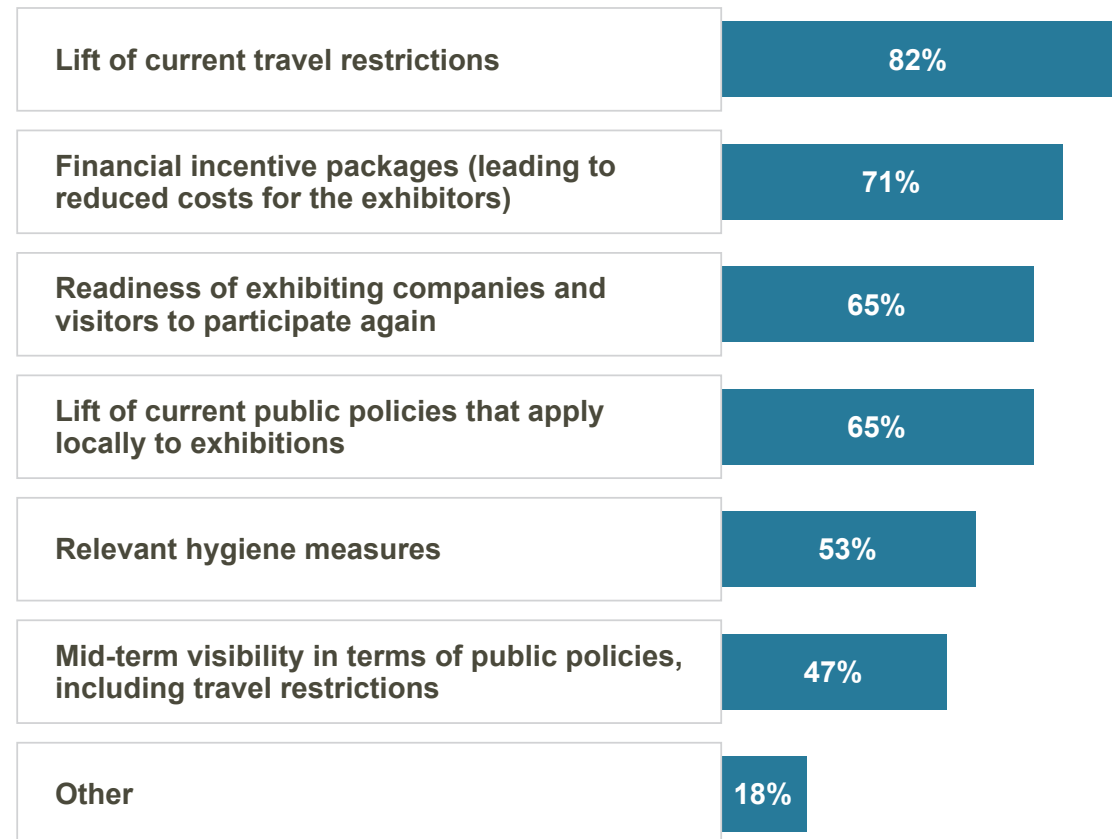




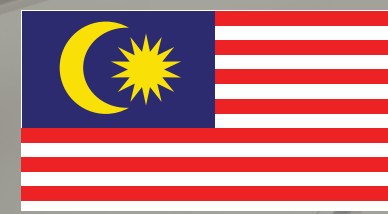
When do you believe exhibitions will open again in your city?



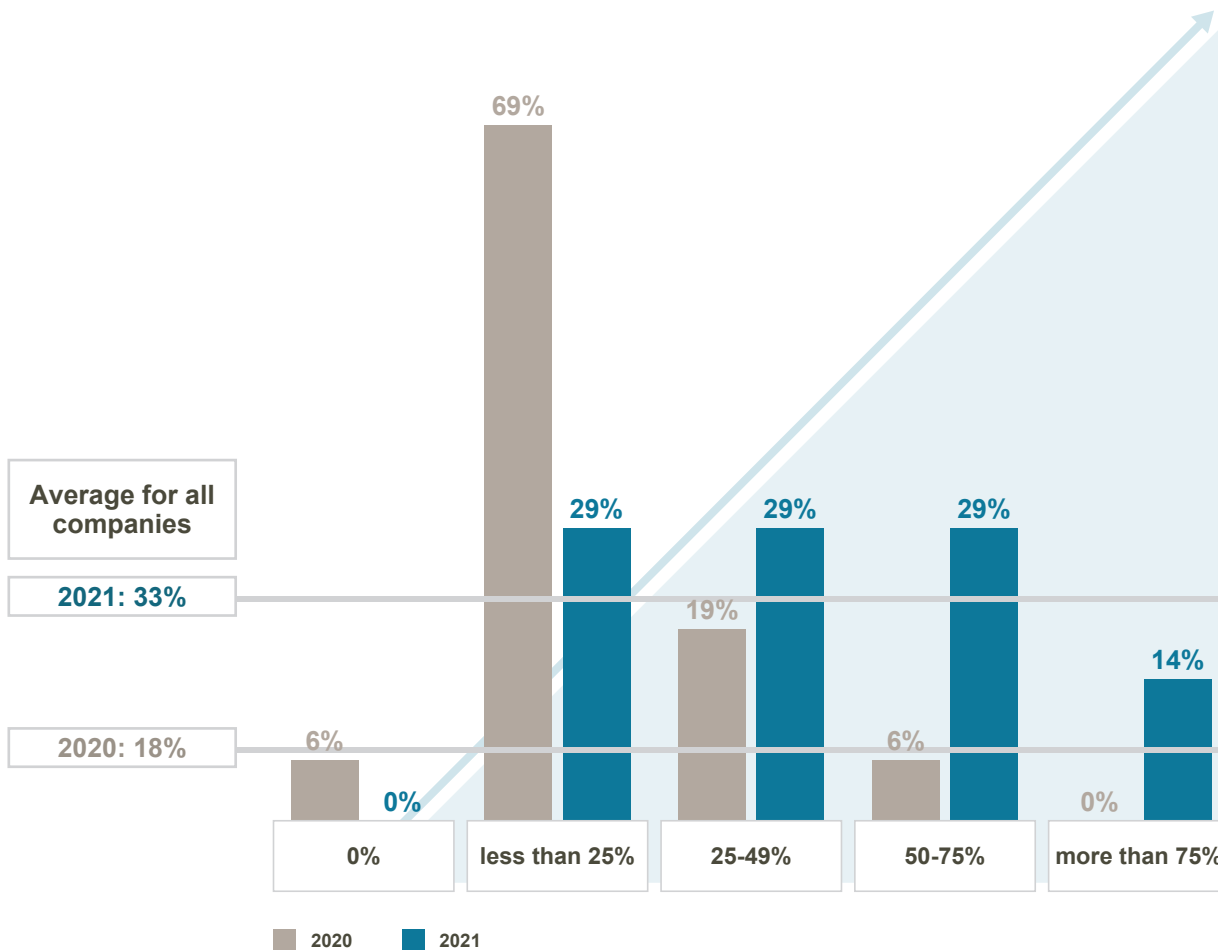
What do you believe would most help the “bounce back” of exhibitions?



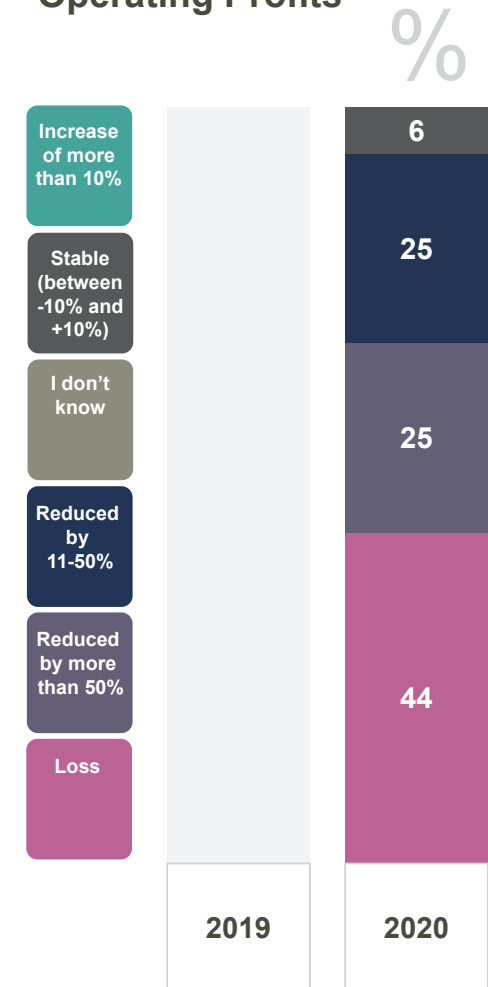
Detailed results for Malaysia



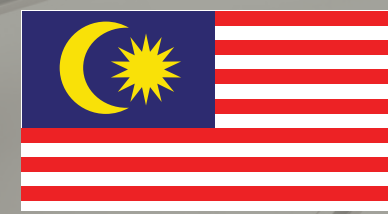
Revenue compared to 2019



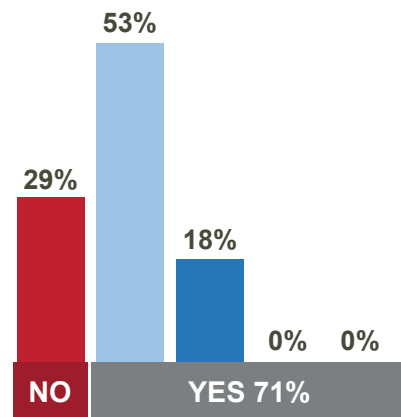
Operating Profits



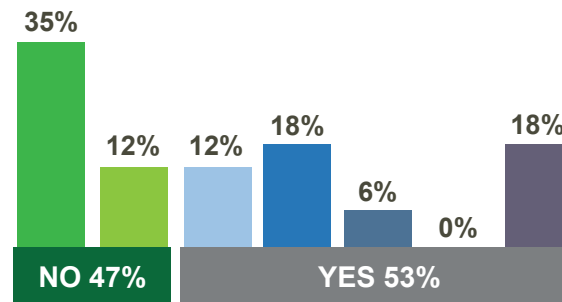
Detailed results for Malaysia



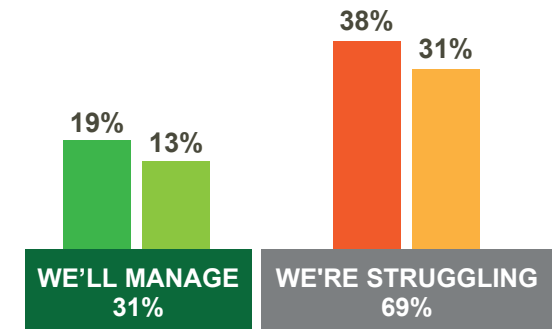
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?

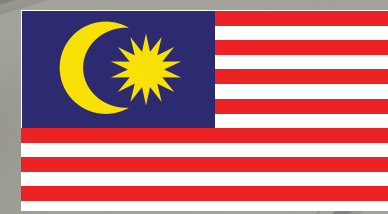


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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- No, thanks to governmental support/ short time work allowance
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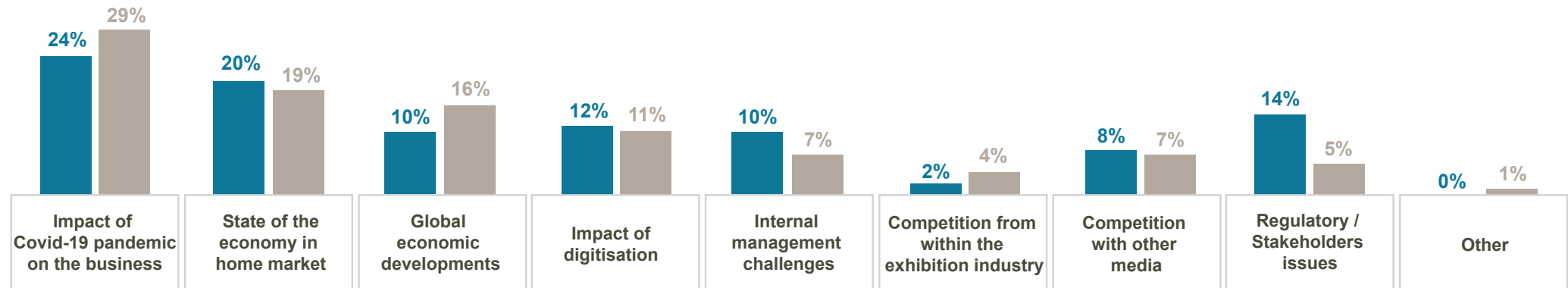
Detailed results for Malaysia



Most important business issues in the exhibition industry

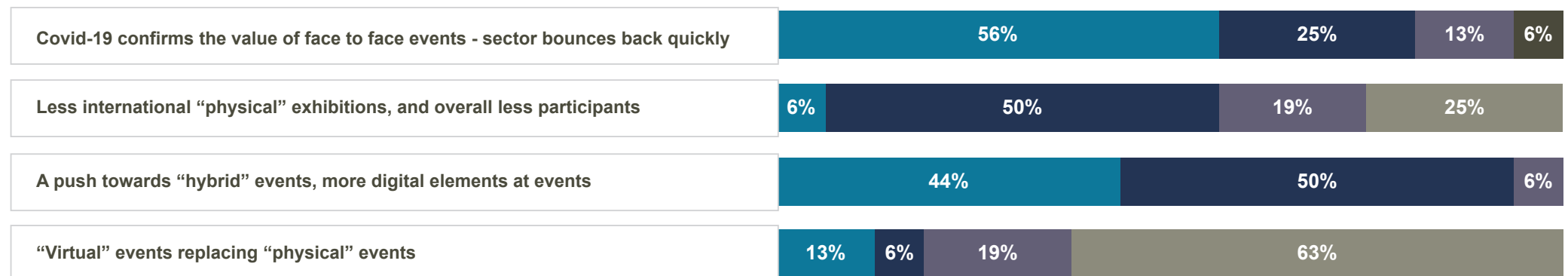
Malaysia

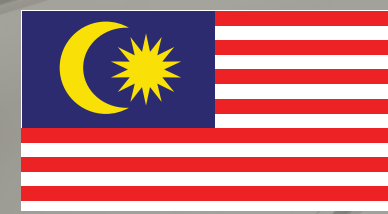
Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

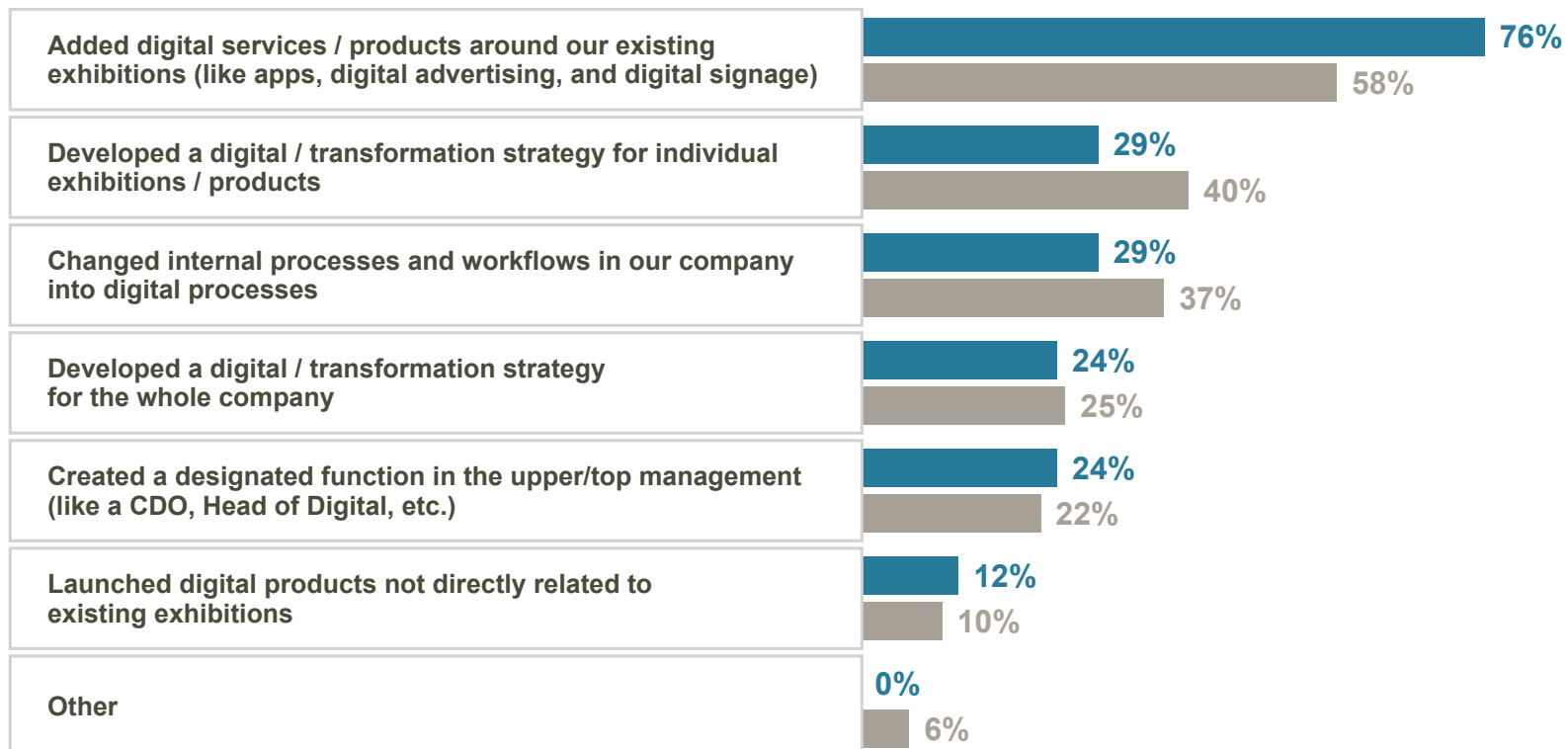


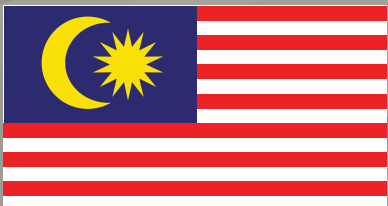


Malaysia

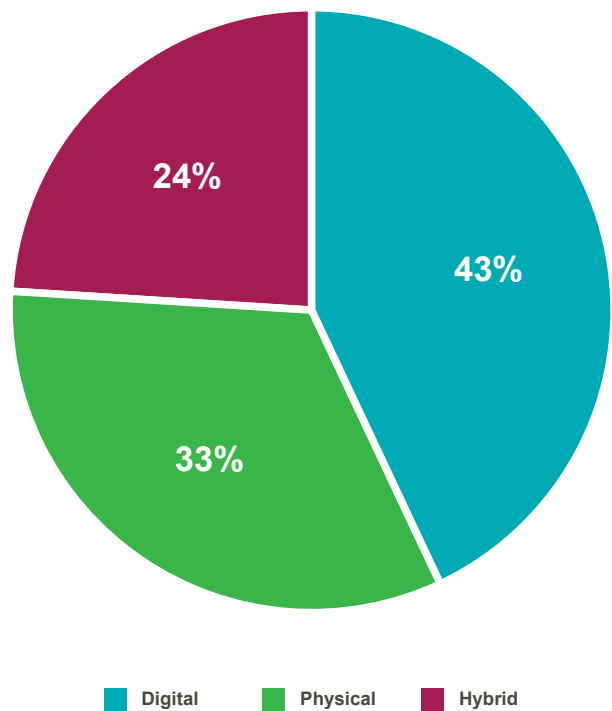
Global

Digitisation: implementation in Malaysia and globally

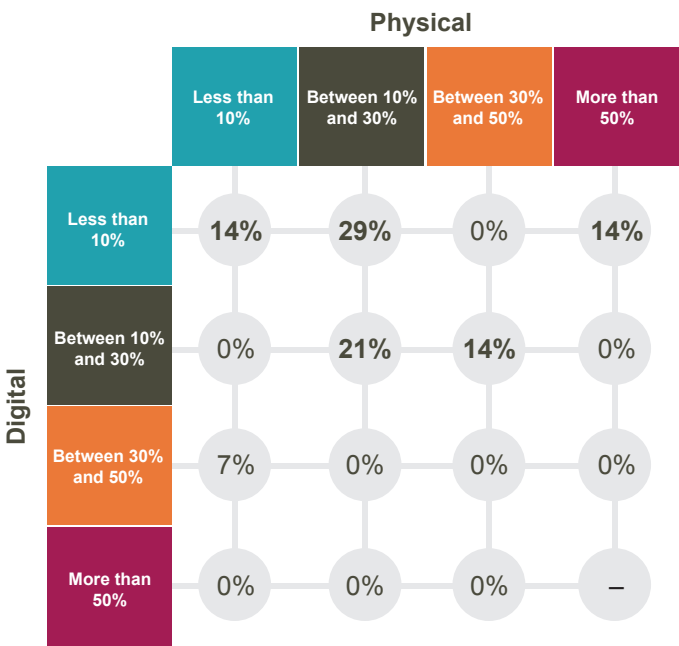




Number of fairs projected in 2021

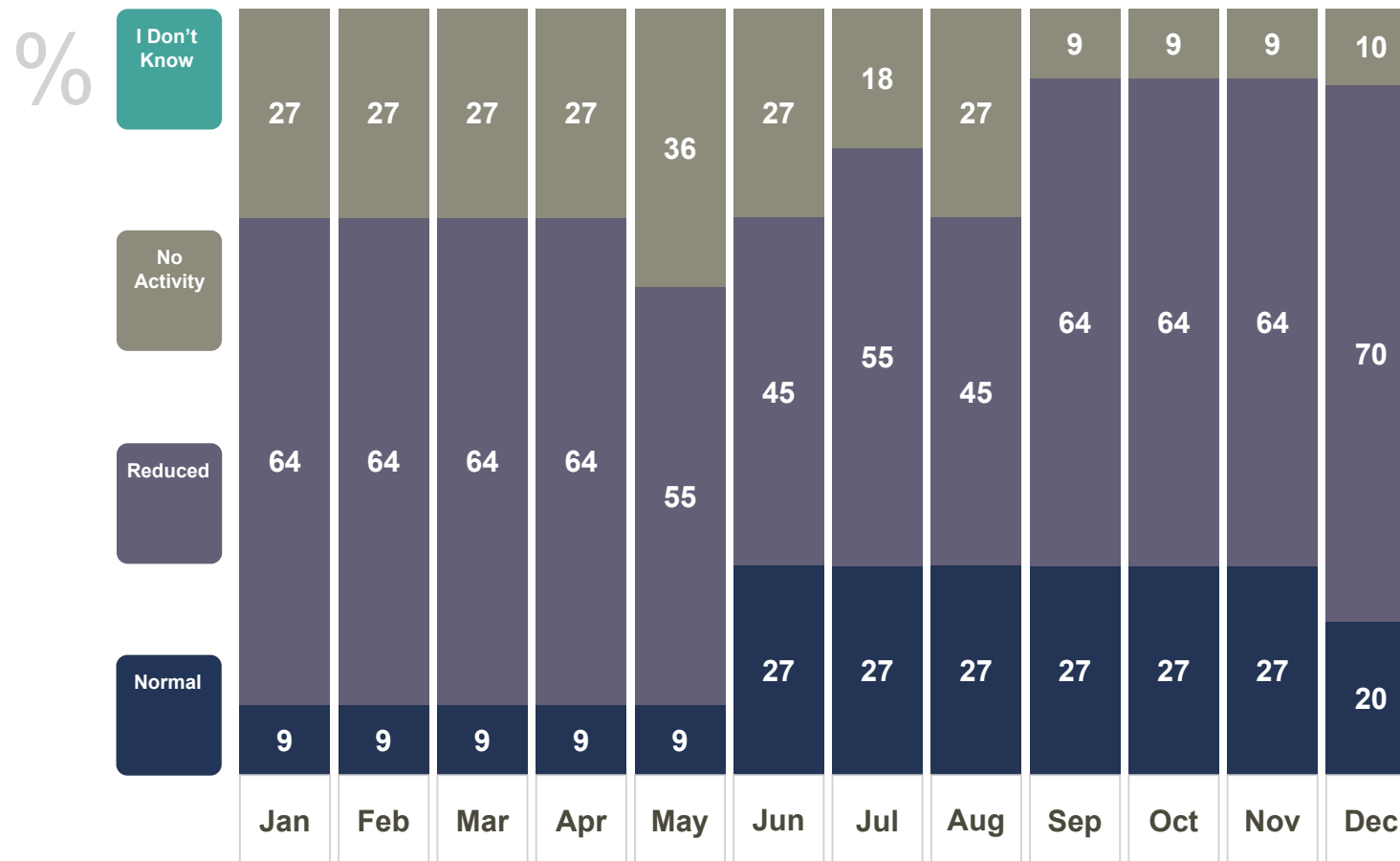


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years





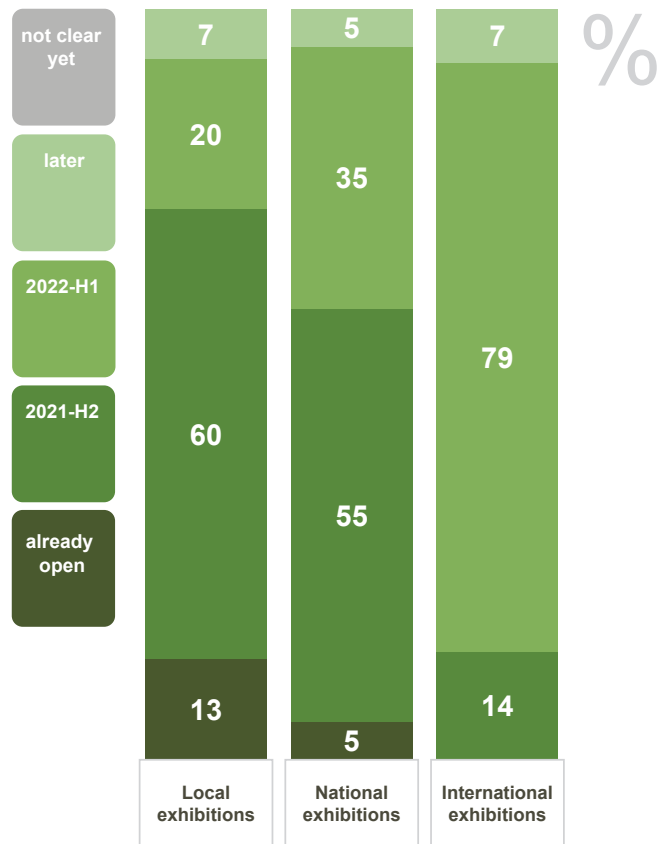
Situation of industry operations in 2021



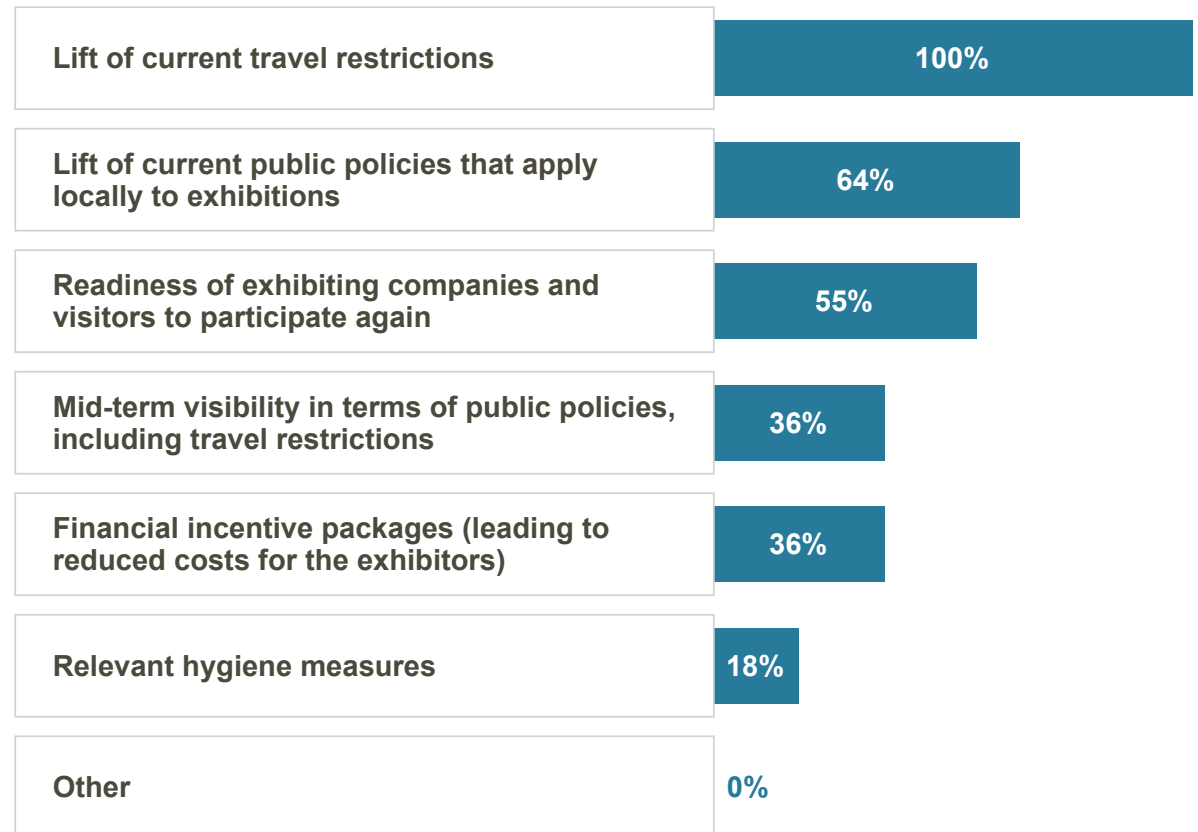
Detailed results for Singapore



When do you believe exhibitions will open again in your city?



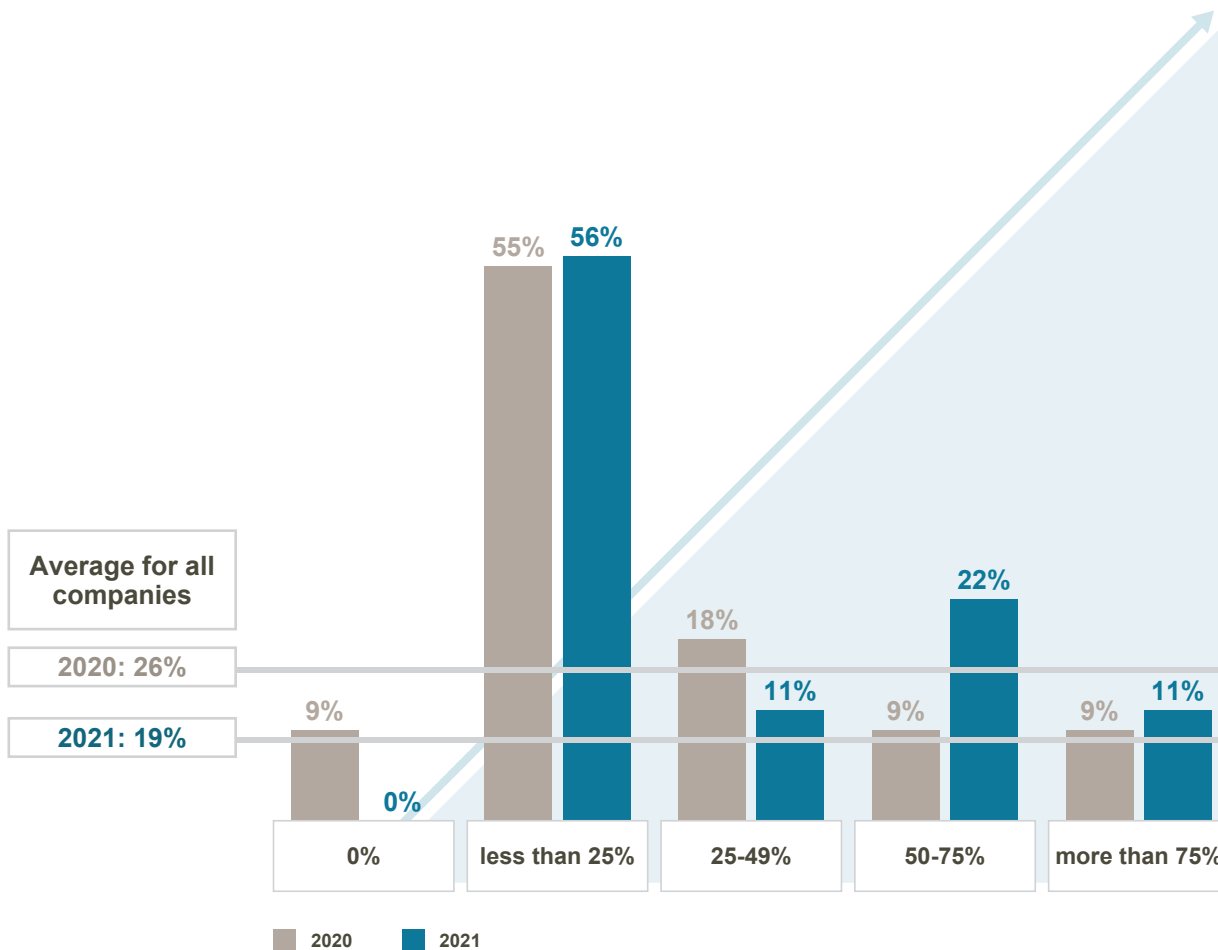
What do you believe would most help the “bounce back” of exhibitions?



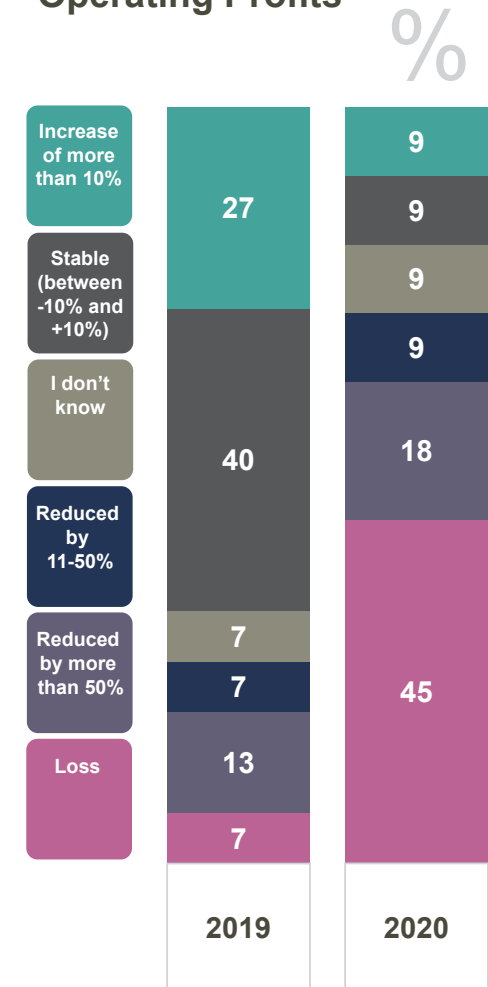
Detailed results for Singapore



Revenue compared to 2019



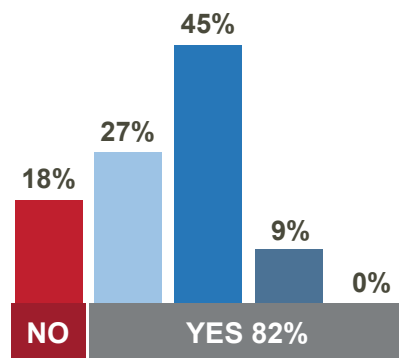
Operating Profits



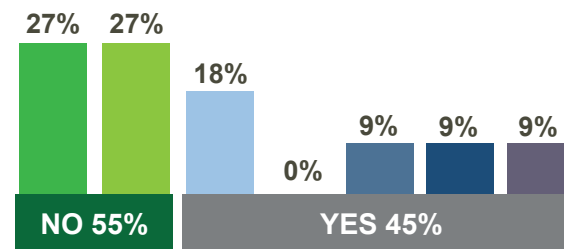
Detailed results for Singapore



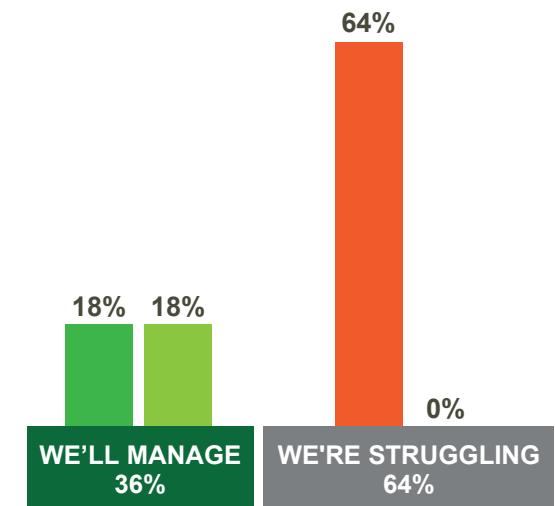
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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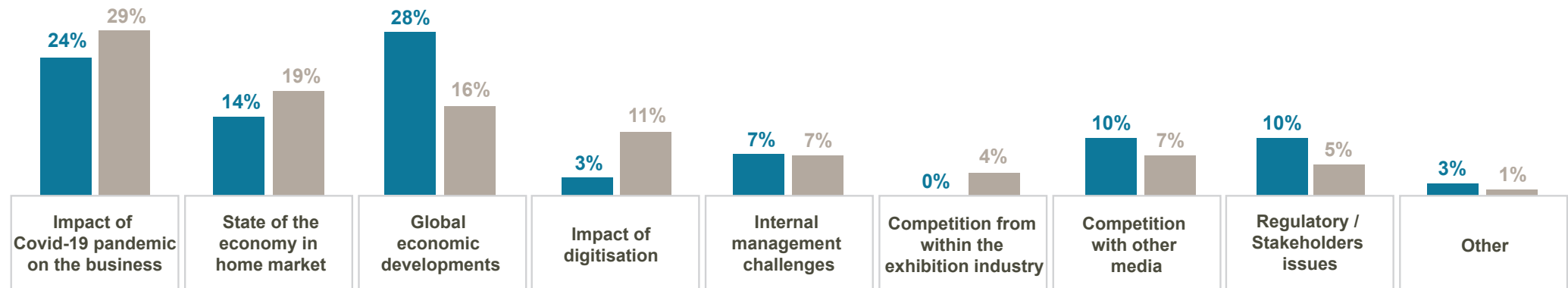
Detailed results for Singapore



Most important business issues in the exhibition industry

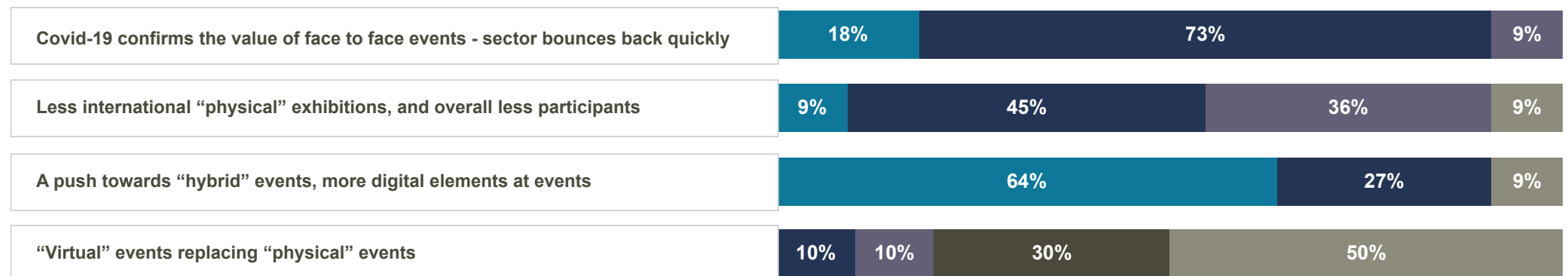
Singapore

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

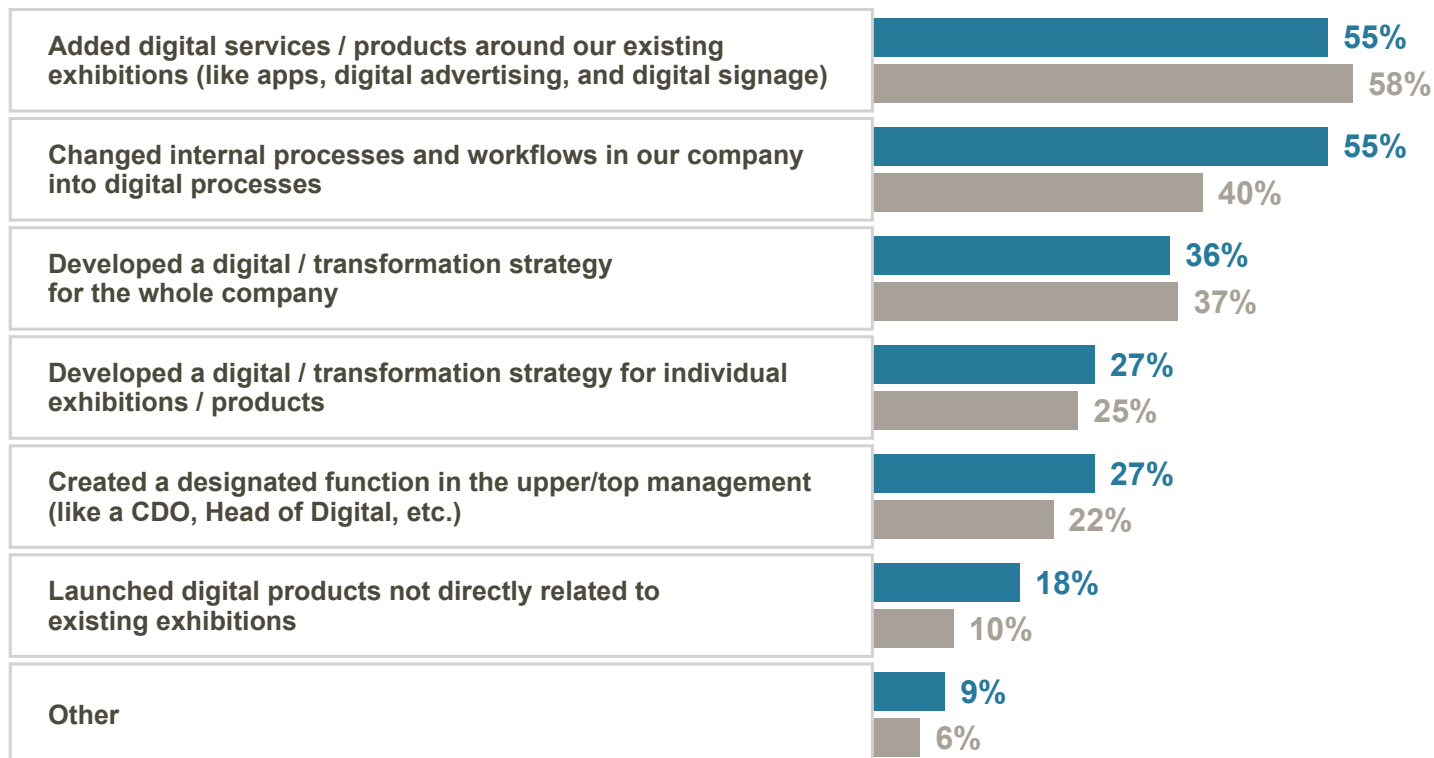




Singapore

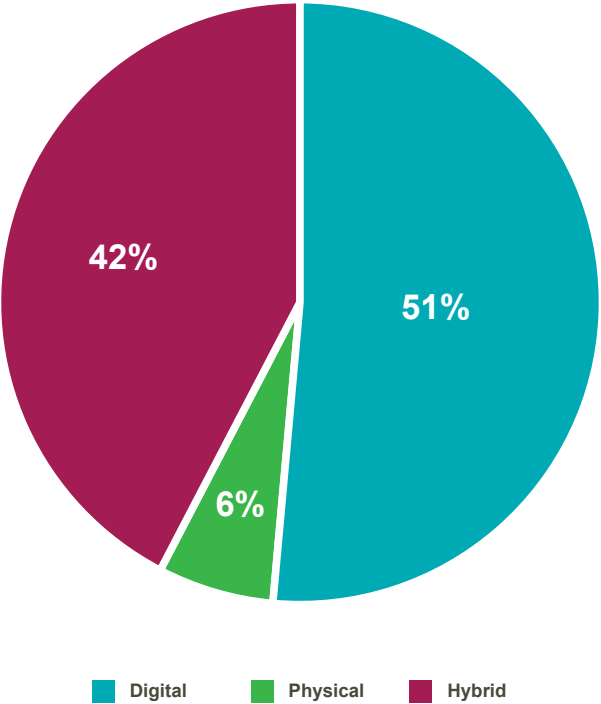
Global

Digitisation: implementation in Singapore and globally

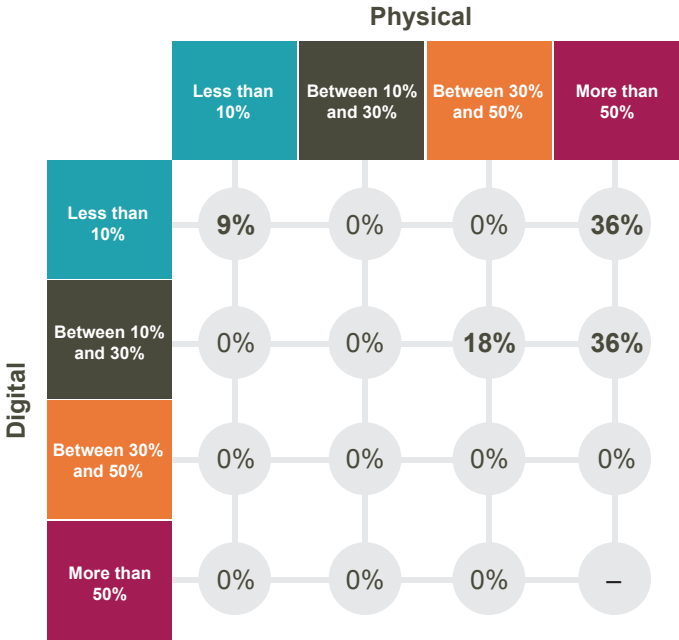




Number of fairs projected in 2021

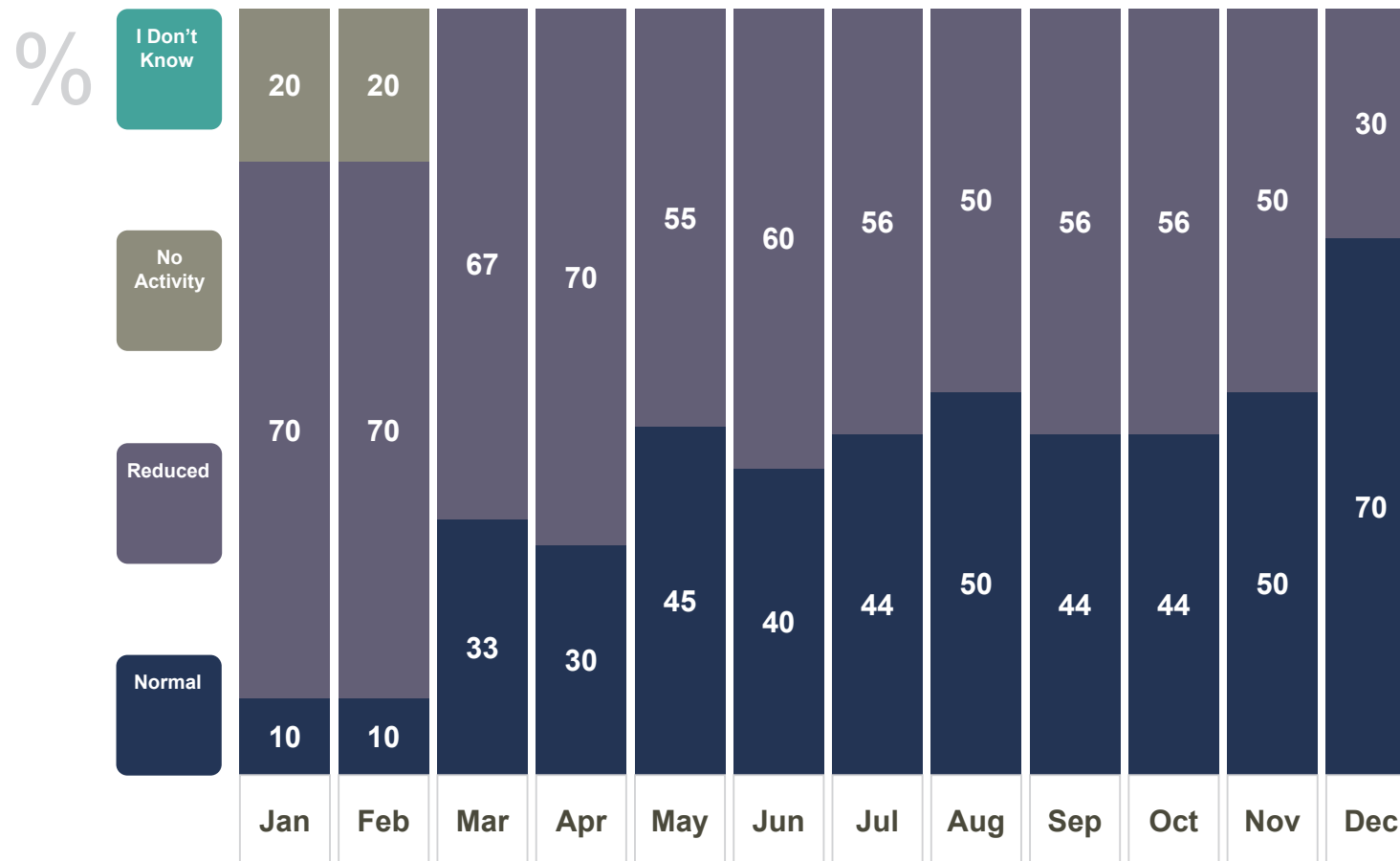


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



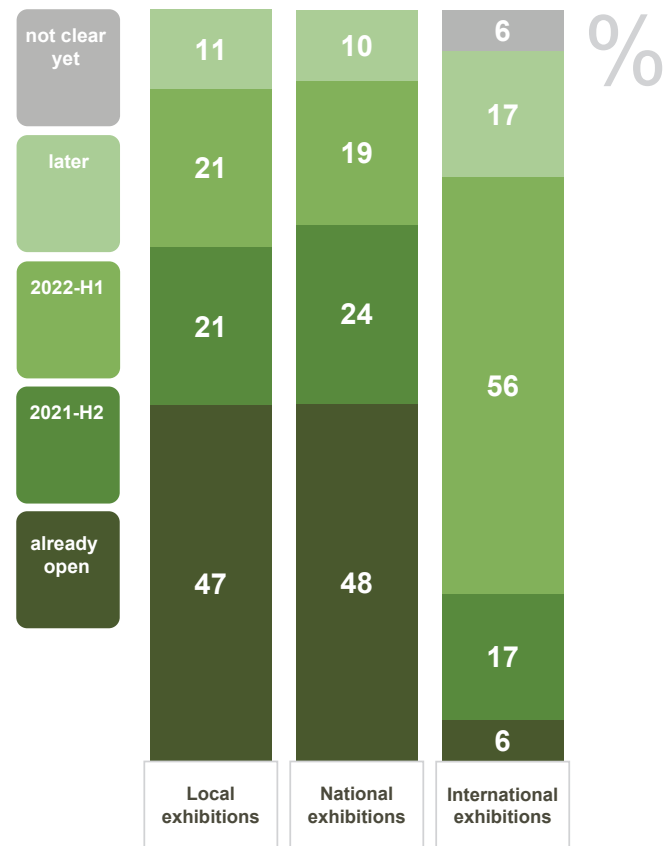


Situation of industry operations in 2021

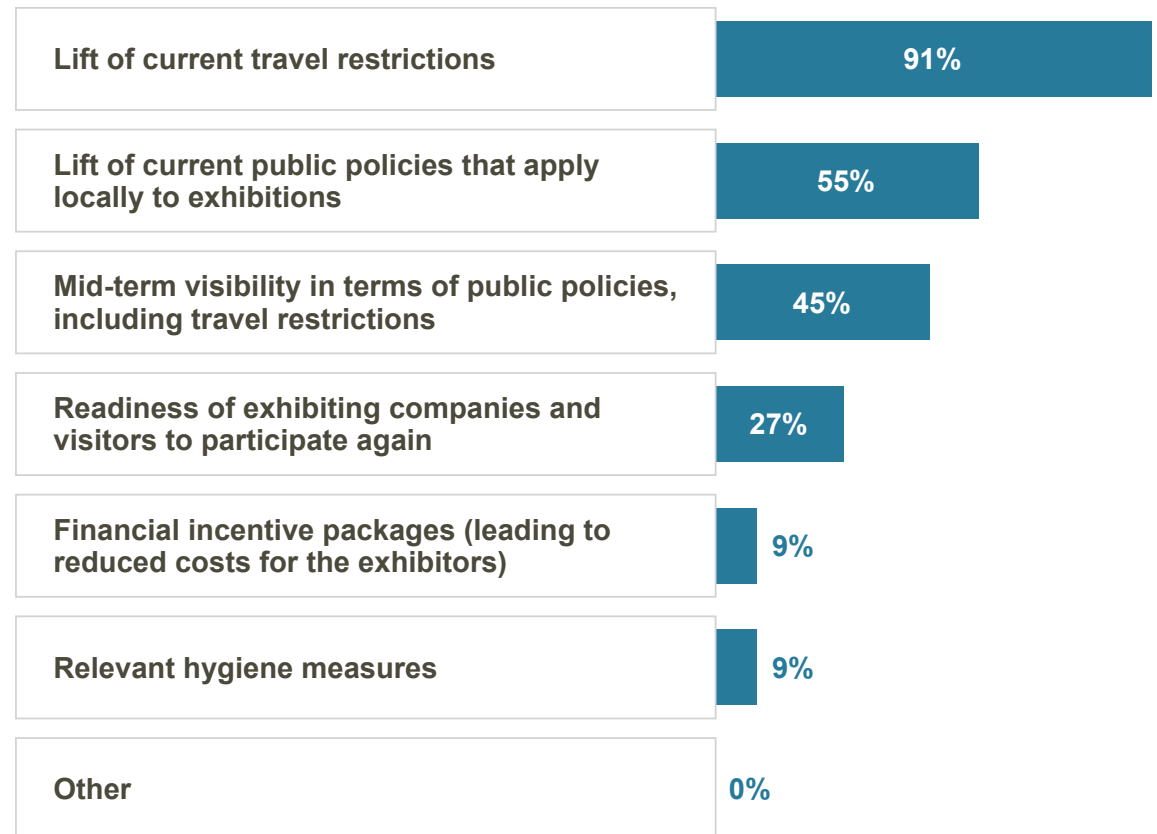




When do you believe exhibitions will open again in your city?



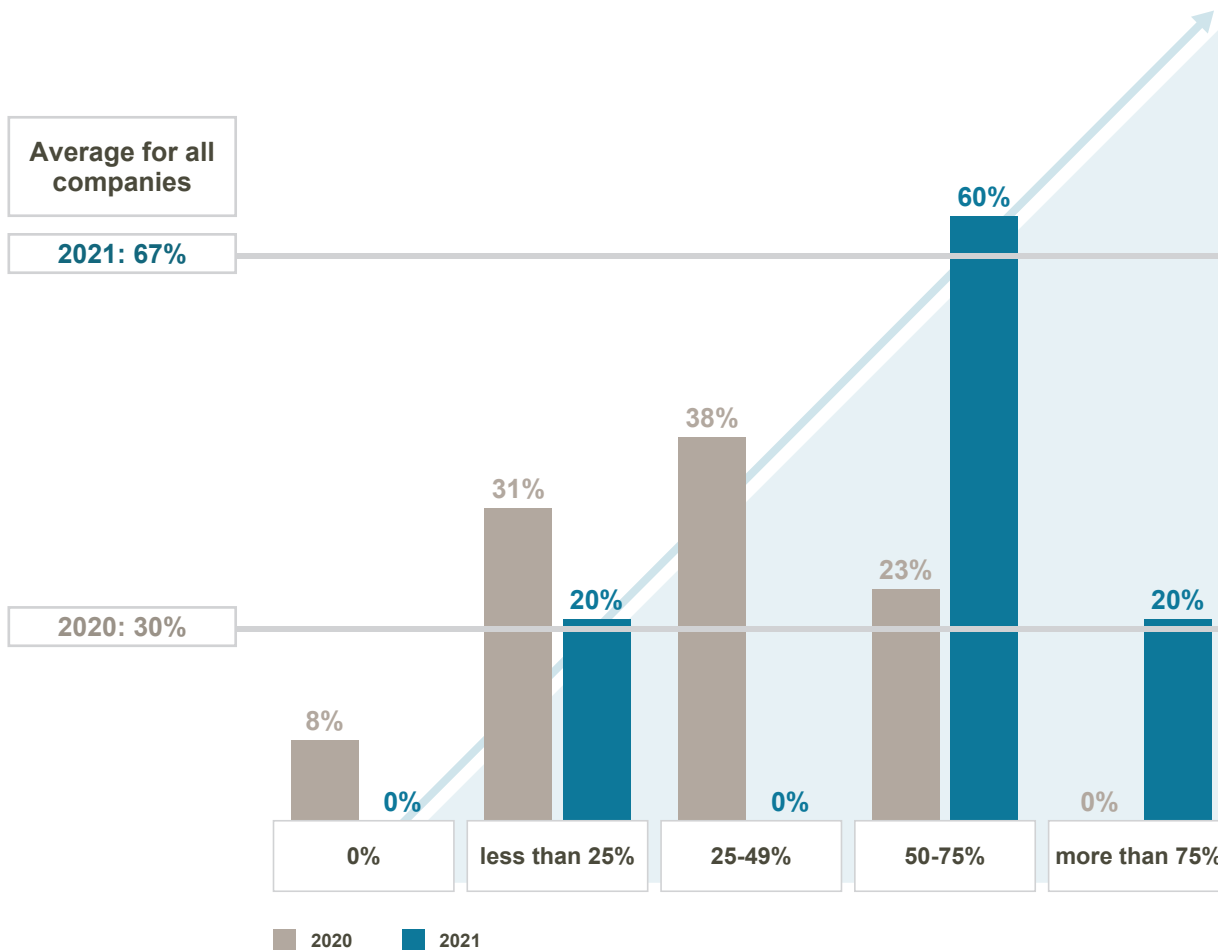
What do you believe would most help the “bounce back” of exhibitions?



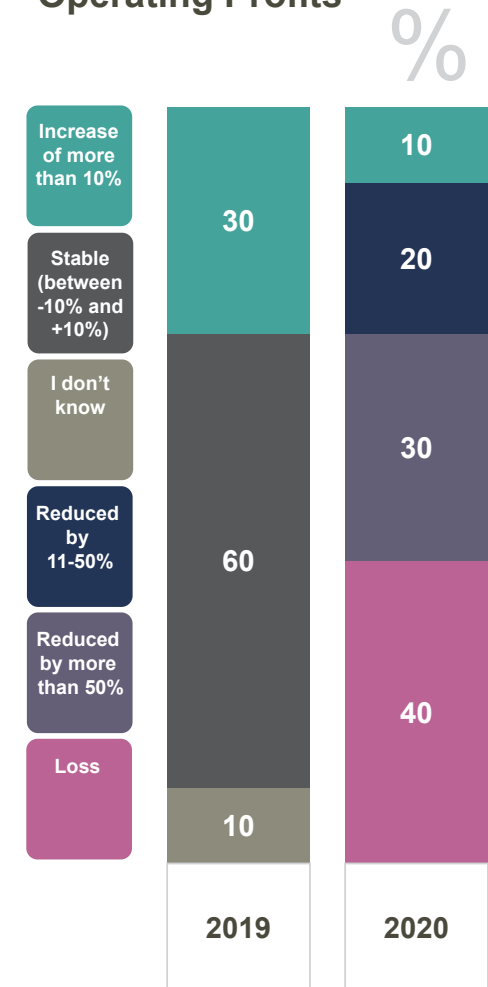
Detailed results for South Korea



Revenue compared to 2019



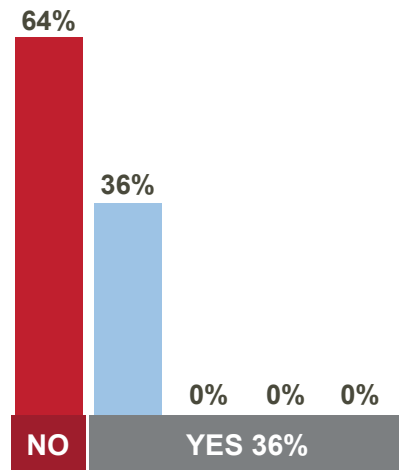
Operating Profits



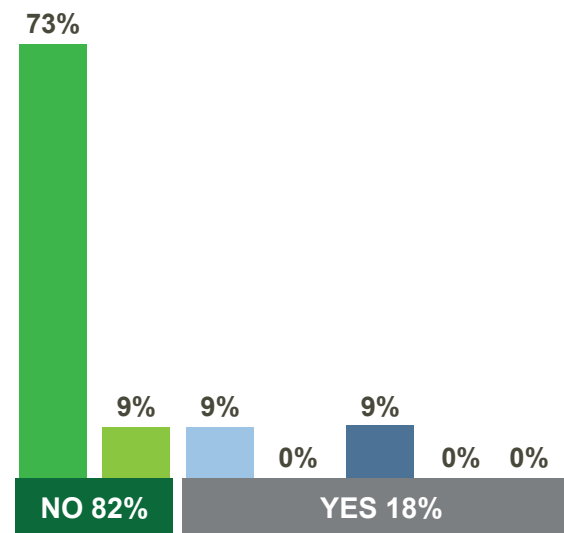
Detailed results for South Korea



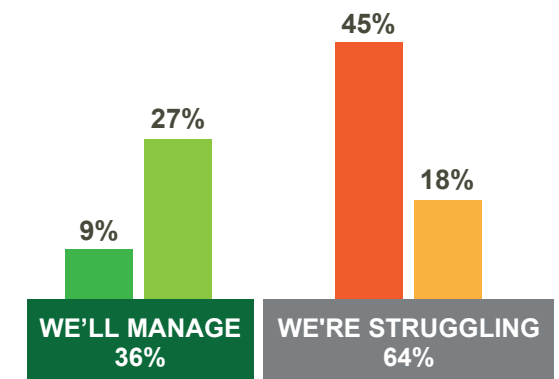
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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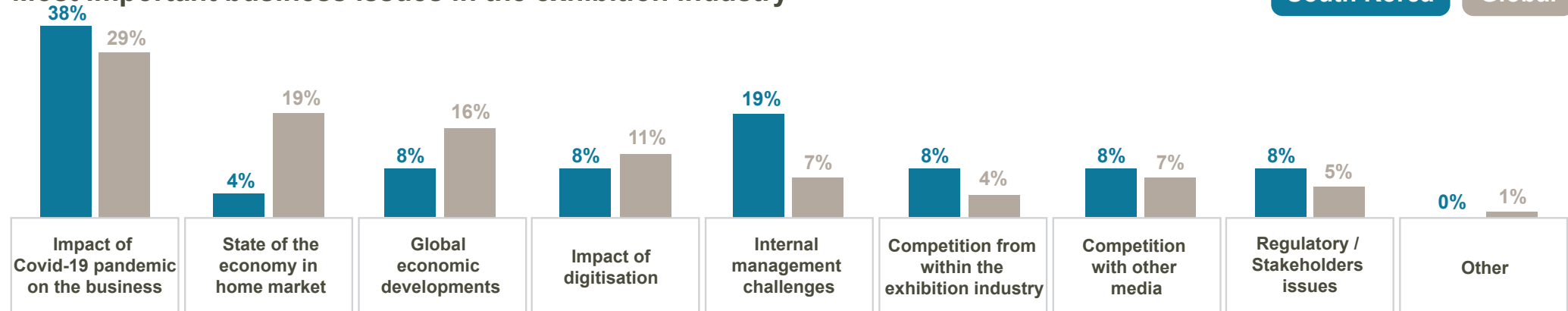
Detailed results for South Korea



Most important business issues in the exhibition industry

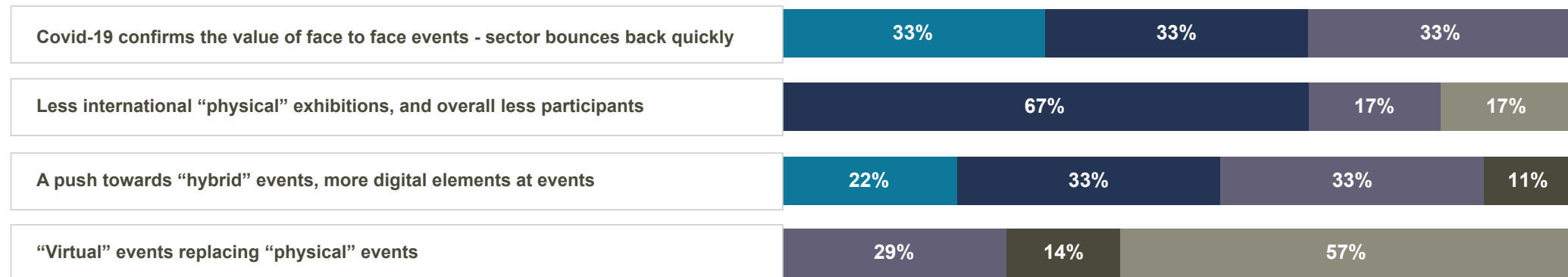
South Korea

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

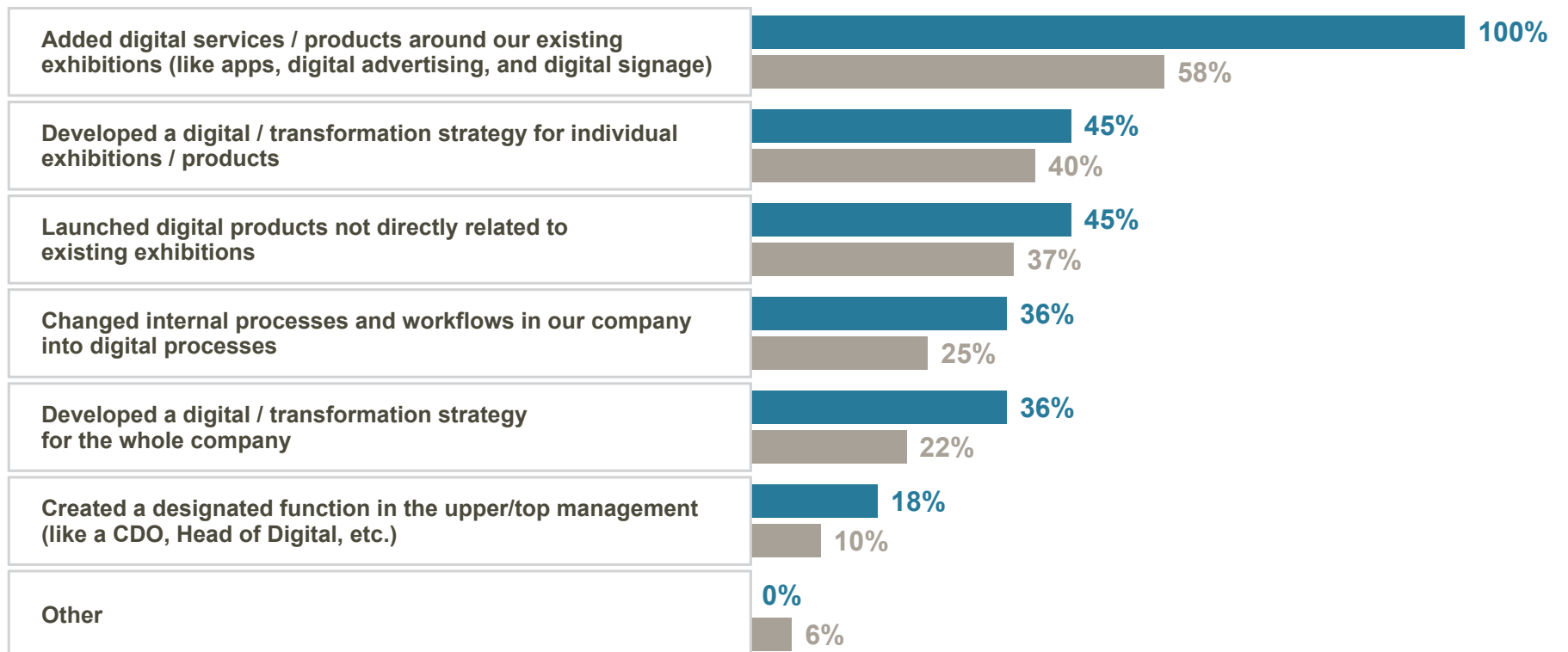




South Korea

Global

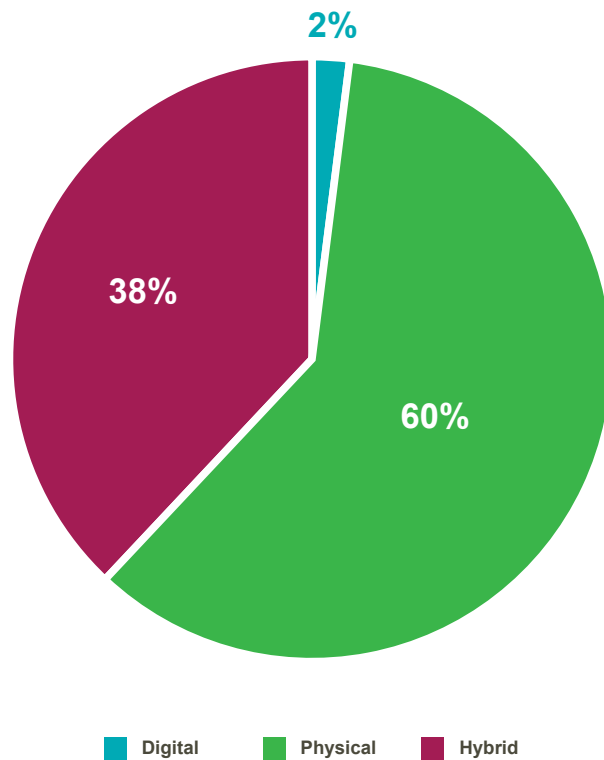
Digitisation: implementation in South Korea and globally



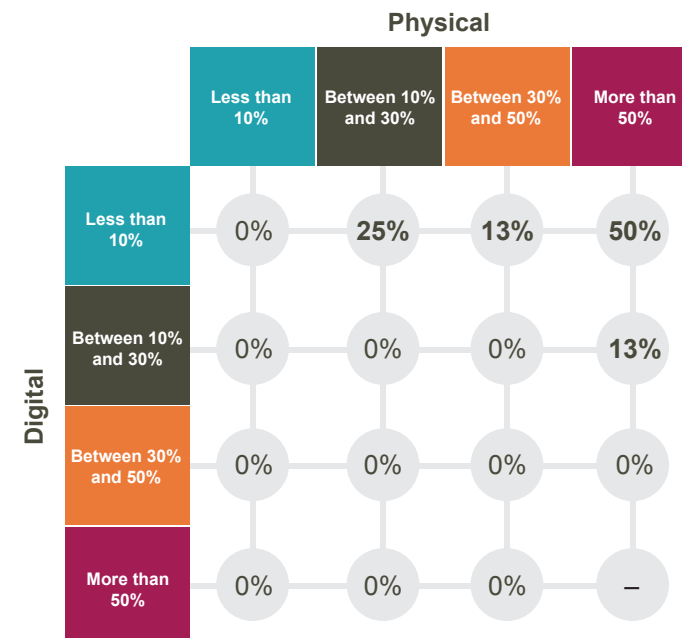
Detailed results for South Korea



Number of fairs projected in 2021

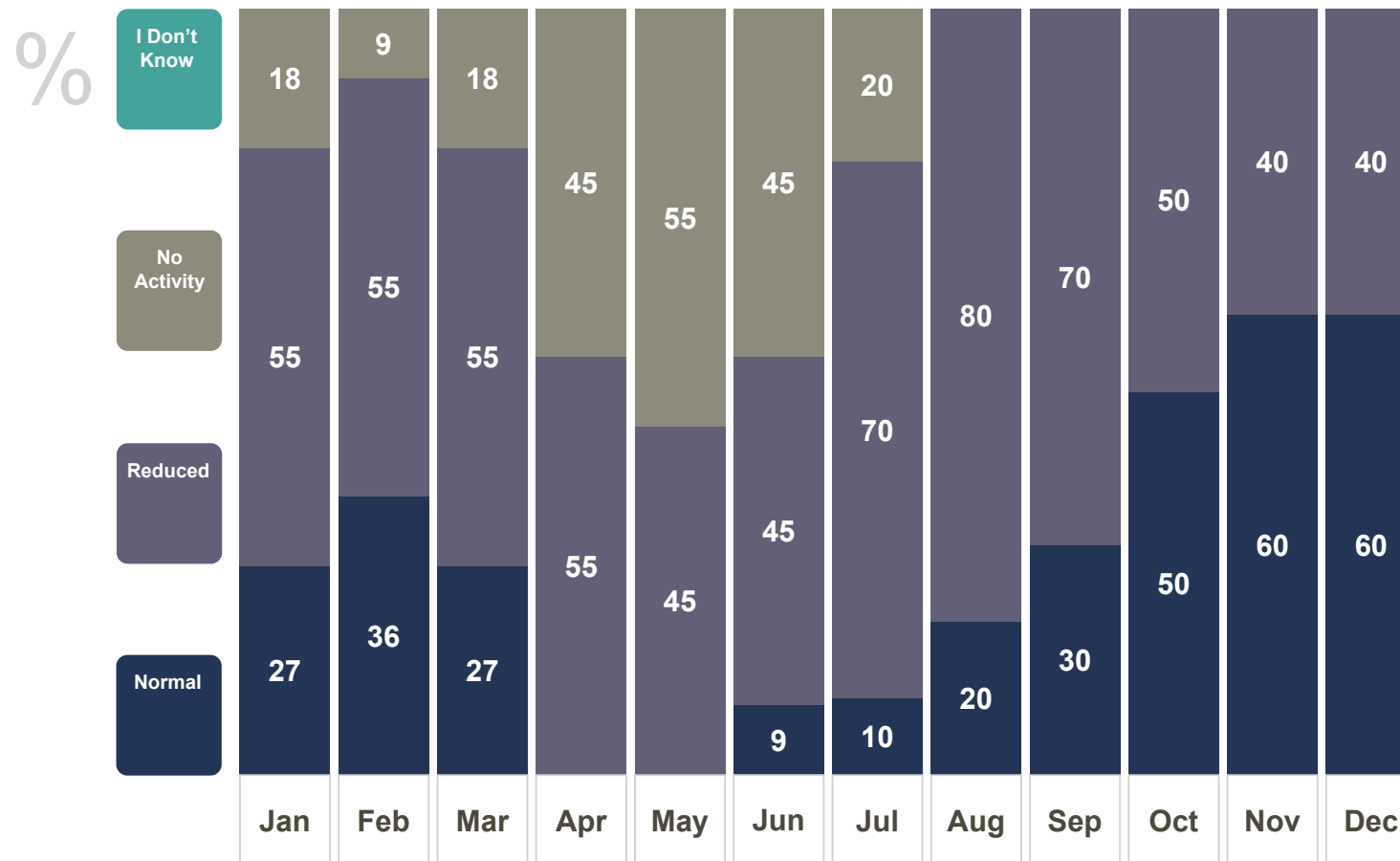


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



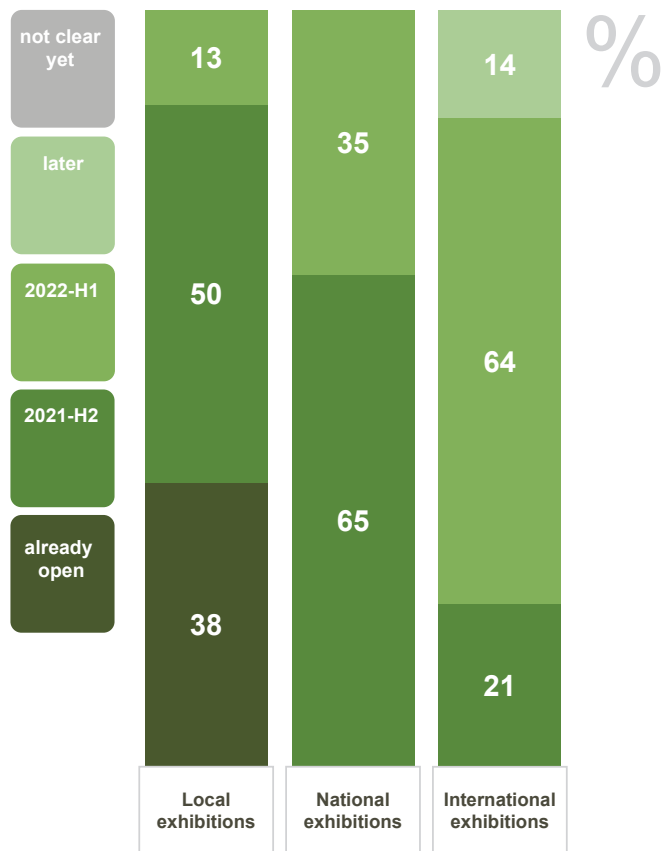


Situation of industry operations in 2021

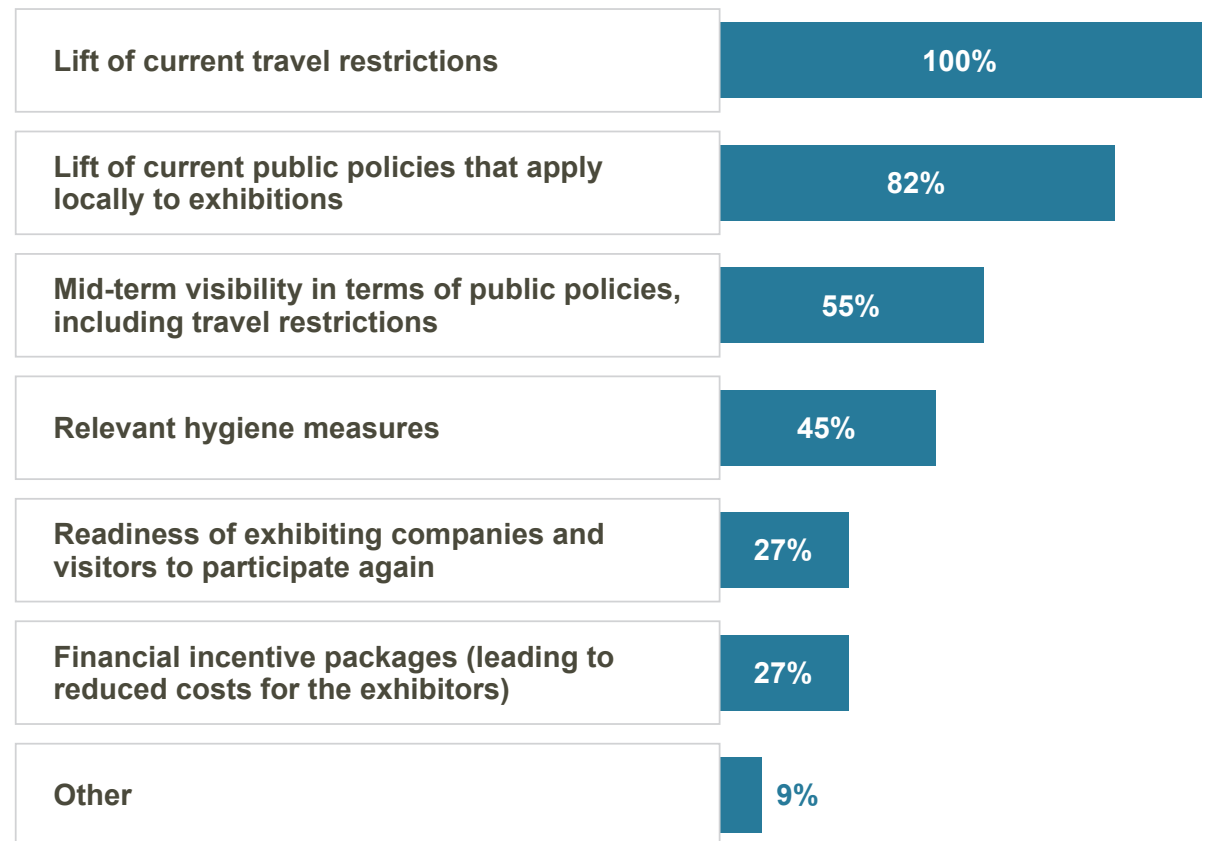




When do you believe exhibitions will open again in your city?

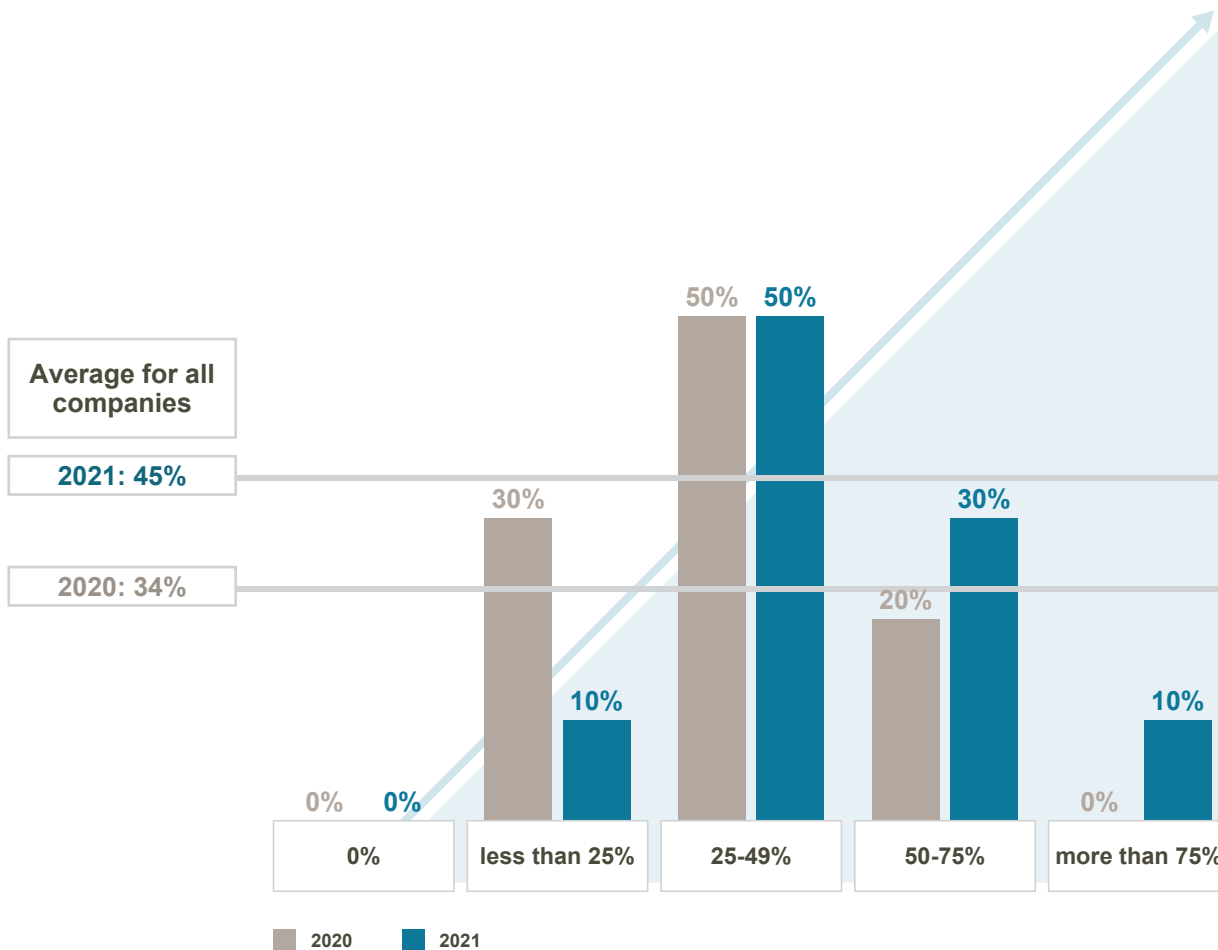


What do you believe would most help the “bounce back” of exhibitions?

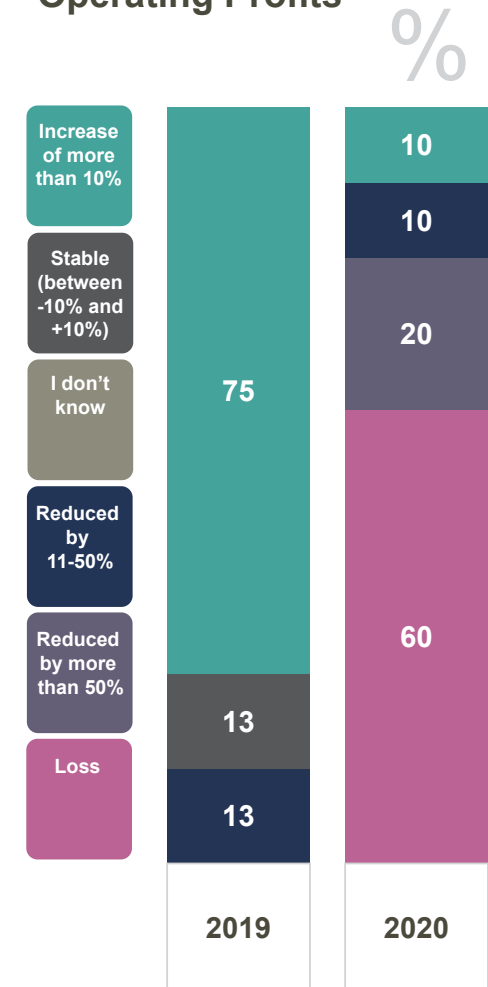




Revenue compared to 2019



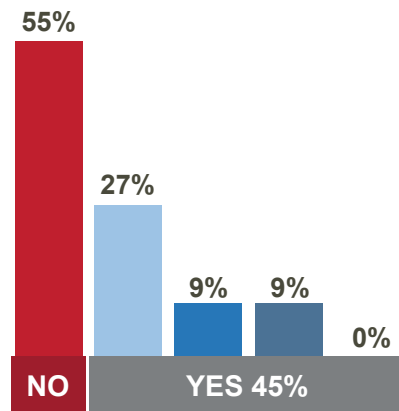
Operating Profits



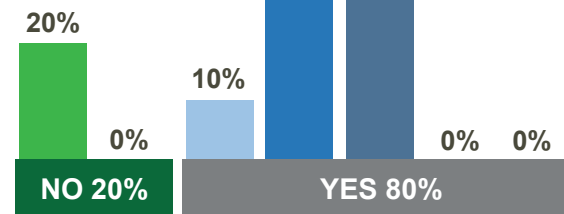
Detailed results for Thailand



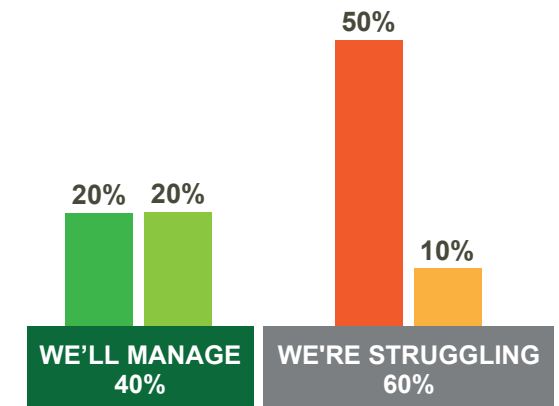
Did your company benefit from public financial support?



Have you had to reduce your workforce?



If there is no business for the next 6 months, which best applies?



- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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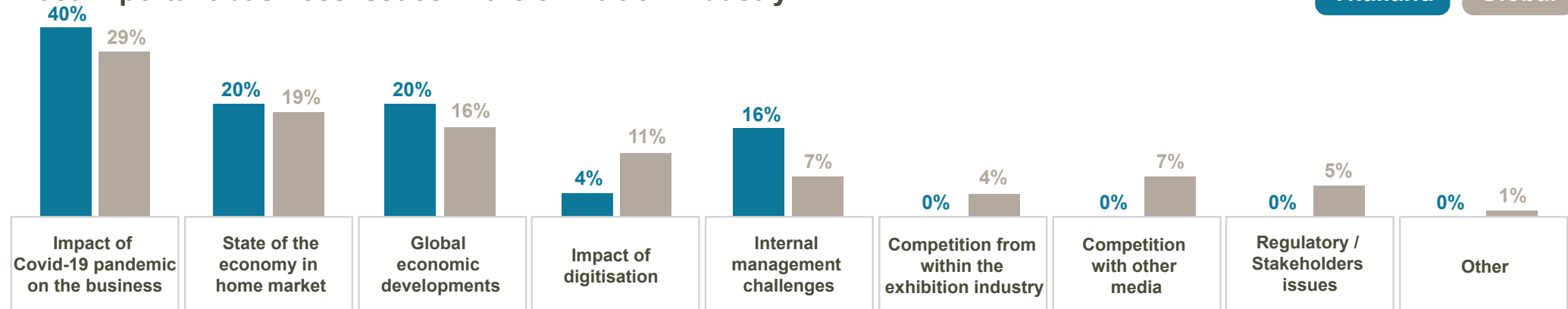
Detailed results for Thailand



Most important business issues in the exhibition industry

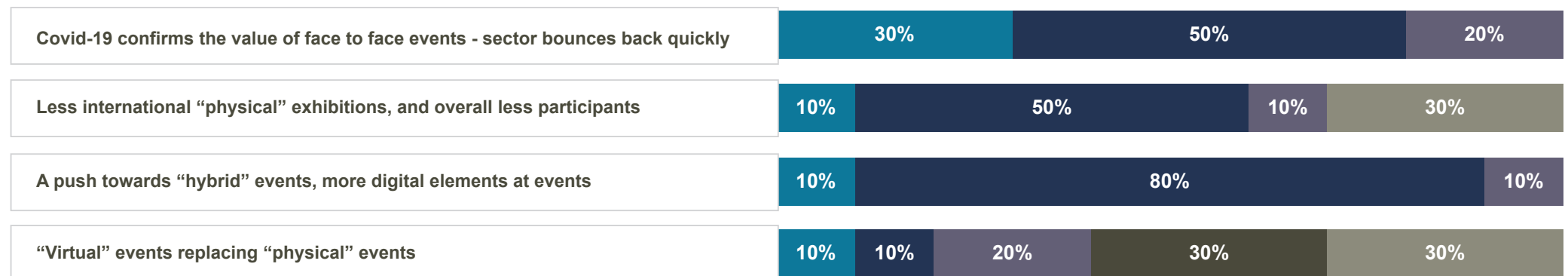
Thailand

Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not

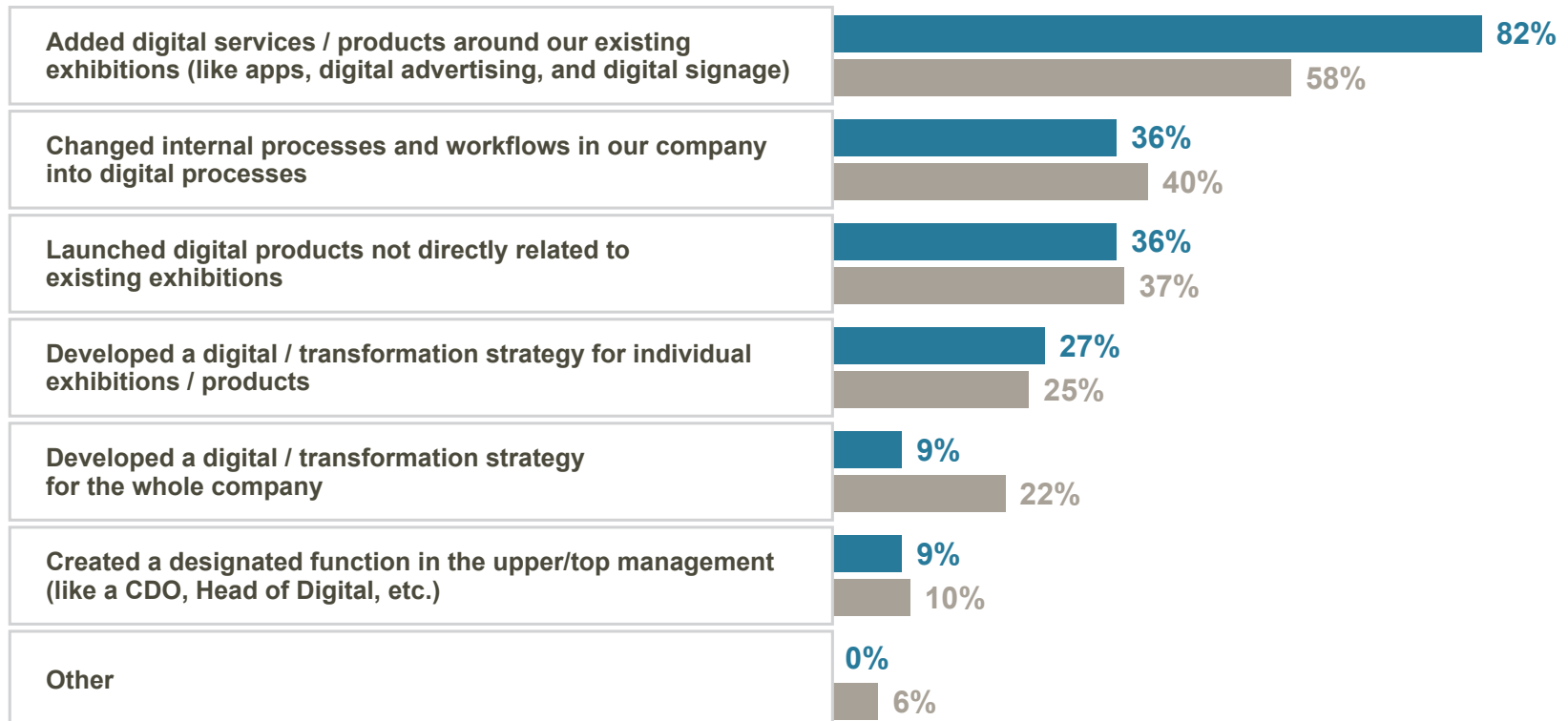




Thailand

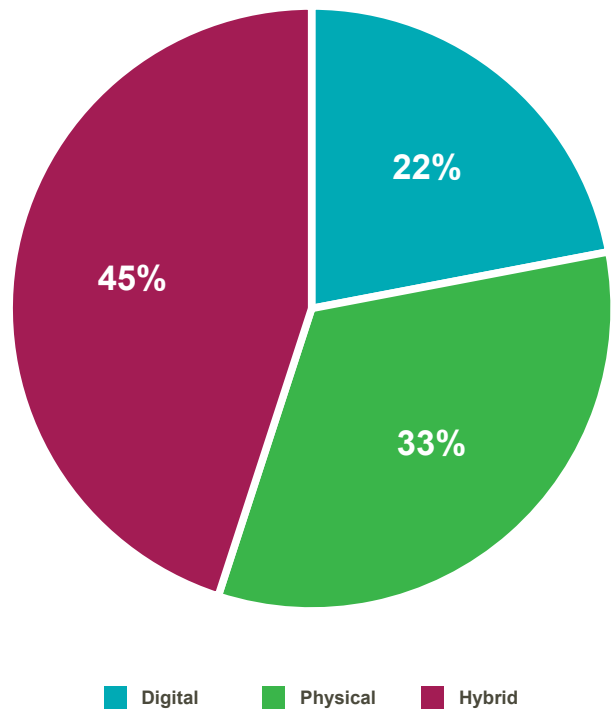
Global

Digitisation: implementation in Thailand and globally

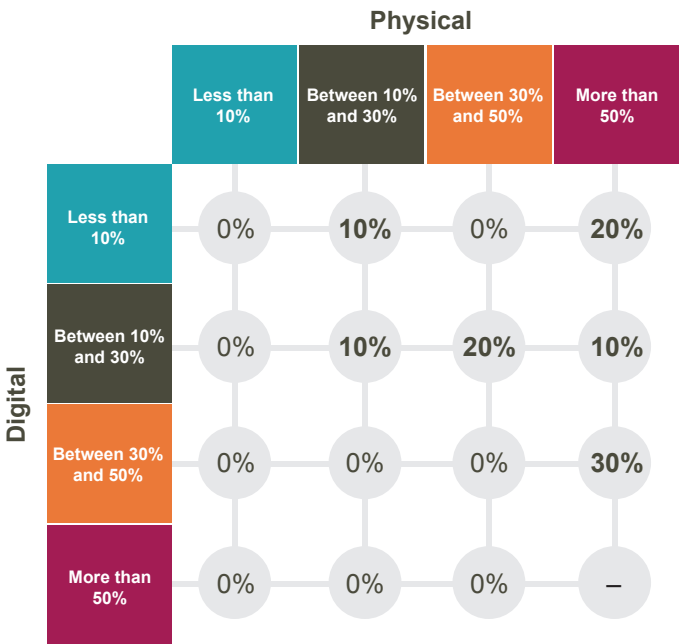




Number of fairs projected in 2021



Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. This 27th survey was concluded in June 2021 and includes data from 474 companies in 64 countries and regions. The report delivers outlooks and analysis for 24 countries and regions. In addition, it analyses five aggregated regional zones.

While the results highlight the strong impact the COVID-19 pandemic has had on the global exhibition industry in 2020, the situation is gradually improving, and there is a strong belief that the sector, primarily driven by physical exhibitions and business events, will bounce back quickly.

Globally the situation is gradually improving: the proportion of companies globally expecting “no activity” for the last quarter of 2021 has fallen from 53% in January to less than 10%, while the proportion of companies with “normal activity” has increased from 12% to close to 50%.

These results vary depending on region and are primarily driven by the currently confirmed or expected “reopening date” of exhibitions. While several markets reportedly reopened in June 2021, the majority of companies in all regions expect both local and national exhibitions to open again in the coming 12 months, and international exhibitions to reopen in the first half of 2022.

When asked what element would most help towards the “bounce-back” of exhibitions, the majority of companies rank “lifting of current

travel restrictions” (71% of answers), “readiness of exhibiting companies and visitors to participate again” (58% of answer), and “lifting of current public policies that apply locally to exhibitions” (55% of answers) as the key drivers.

On average globally, it is currently expected that 2021 revenues will represent 47% of those of 2019. In terms of profits, 51% of companies reported a loss in 2020, and 24% a reduction of their profit by more than 50%.

Overall:

- 48% of companies have benefitted from some level of public financial support; for the majority of these, this represented less than 10% of their overall 2019 costs.
- 57% of companies have had to reduce their workforce, over half of these have made reductions of more than 25%.
- 10% of companies state they will have to permanently close if there is no business for the next six months.
- For 57% globally, “it will be hard, but we can keep our heads above water”, while 34% of companies consider they will manage.

In line with results from the last Barometer six months ago, “impact of the COVID-19 pandemic on the business” and “state of the economy in home market” are considered to be the two most important

business issues, selected by 29% and 19% of respondents. “Global economic developments” (15% of respondents) “impact of digitisation” (10% of respondents) and “internal management challenges” (9% of respondents) also remain high on the list of key business issues.

The digitisation of products and services gained momentum throughout the pandemic, and 58% of respondents said they have added digital services/products (such as apps, digital advertising and digital signage) to their existing exhibition offerings. In addition, 40% have developed a digital transformation strategy for individual exhibitions or products.

In terms of future exhibition formats, global results indicate that:

- 78% of companies (up from 64% six months ago and 57% 12 months ago) of respondents are confident that “COVID-19 confirms the value of face- to-face events” anticipating that the sector will bounce back quickly (39% “Yes, for sure” and 39% “Most probably”), while 20% are “Not sure”.
- 46% - compared to 63% 6 months ago and 57% 12 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants” (6% “Yes, for sure” and 39% “Most probably”), and 44% are “Not sure”.

- 76% of companies – 80% 6 months ago and 82% 12 months ago - consider that there is “A push towards hybrid events, more digital elements at events” (26% “Yes, for sure” and 50% “Most probably”).
- 11% - down from 14% 6 months ago and 17% 12 months ago - agrees with the statement that “Virtual events replacing physical events” (3% “Yes, for sure” and 8% “Most probably”), 36% are “Not sure” and 53% are stating “definitely not”.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION! THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN DECMEBER 2021 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 474 (in 64 countries/regions)

North America	42	Europe	159	Middle East	25
Canada	3	Belgium	2	Lebanon	2
Mexico	21	Bulgaria	1	Oman	3
USA	18	Croatia	2	Qatar	2
		Czech Republic	1	Saudi Arabia	3
		Finland	1	United Arab Emirates	15
Central & South America	82	France	21		
Argentina	6	Georgia	1	Asia & Pacific	147
Bolivia	2	Germany	20	Australia	15
Brazil	17	Greece	4	China	21
Chile	16	Hungary	1	Hong Kong	10
Colombia	21	Ireland	1	India	24
Costa Rica	2	Italy	21	Indonesia	9
Cuba	1	Netherlands	5	Japan	13
Ecuador	3	Poland	2	Malaysia	17
El Salvador	1	Portugal	4	New Zealand	1
Guatemala	4	Romania	1	Pakistan	1
Panama	3	Russian Federation	17	Philippines	1
Peru	3	Slovenia	1	Singapore	11
Uruguay	3	Spain	16	South Korea	11
		Sweden	4	Sri Lanka	1
Africa	19	Switzerland	1	Thailand	11
Egypt	1	Turkey	12	Vietnam	1
Libya	1	Ukraine	2		
Rwanda	1	United Kingdom	18		
South Africa	16				

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