# **UFI** Global Exhibition Barometer

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Report based on the results of a survey concluded in January 2022



## **UFI** Research: An Overview





Analysing the global exhibition industry with global comparisons.

**Global Barometer** – Bi-annual report on industry developments.

**World Map of Venues** – Global report on venue capacity developments.

**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.

Status of Sustainability – Report on the status of sustainability in the exhibition industry, including results from surveys conducted by UFI research partner Explori.



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 Latin America** – The first comprehensive overview by UFI of the exhibition industry Latin America.

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

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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## Introduction



Welcome to the 28th edition of the "UFI Global Exhibition Barometer" survey. This study is based on a global survey, conducted in January 2022. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 29 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 401 participating companies, the reach of this barometer is large. 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 (Asociacion 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/ASPERAPI (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan,

MFTA (Macau Fair & Trade Association) in Macau, MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia, 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 (401 from 53 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 24 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%. This applies in particular to the charts related to the public financial support.

Questions related to this survey can be addressed at research@ufi.org

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

## **Operations - Reopening Exhibitions**



The 28th Barometer surveyed participants' monthly operations, to qualify their level of activity as "normal", "reduced" or "no activity", from July 2021 and including their predictions until June 2022. These "company operations" include, for many companies and while faceto-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 expecting "no activity" dropped from 34% to 16% during the second half of 2021, and only 4-5% of companies expect no activity from March 2022.
- In parallel, the proportion of companies declaring "normal activity" has increasedfrom less than two in ten, in July 2021, to around four in ten, between October 2021 and February 2022. And this looks set to increase to around six in ten companies expecting normal activity levels from March 2022.

However, the situation, primarily driven by the "reopening date" of exhibitions, varies from one region to another and sometimes from a country to another within the same region:

 In North America, the proportion of companies declaring a normal level of activity is growing steadily, from less than one in ten, in July 2021, to at least six in ten, from February 2022.

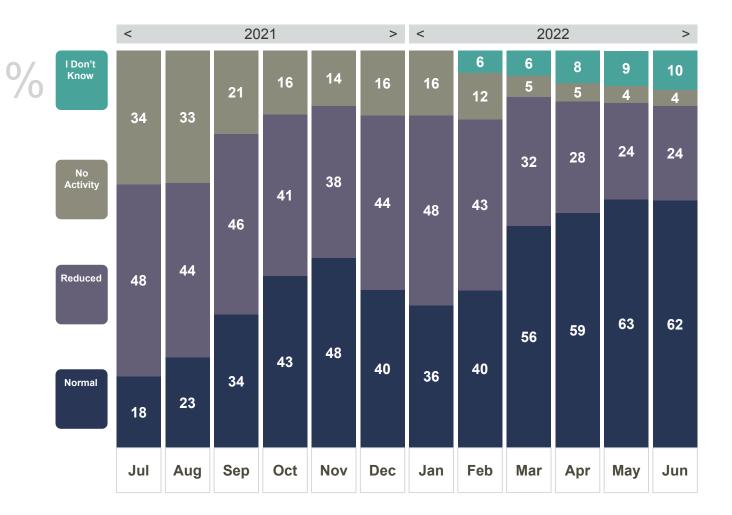
- In several major markets across Central and South America, most companies saw normal activity levels between September and November 2021, and more than eight in ten expect normal activity levels from February 2022.
- In Europe, most companies saw normal activity levels between October and November 2021, and expect the same from March 2022, onwards. However, the picture changes across different countries, with for example a majority of companies seeing normal activity on a larger period in Russia, Spain and, to some extent, Turkey, while in Germany, this is not expected until May 2022.
- The situation is also very different across countries in the Asia-Pacific and Middle East and Africa, where Japan and UAE appeared to be less severely hit than other countries during the second half of 2021, and only Australia, India and Malaysia are also expecting to return to normal activity levels during the first half of 2022.

When asked what elements would most help towards the "bounceback" of exhibitions, seven in ten companies selected "Lifting of current travel restrictions", while five in ten selected "Readiness of exhibiting companies and visitors to participate again", "Mid-term visibility in terms of public policies, including travel restrictions" and "Lift of current public policies that apply locally to exhibitions".

"Financial incentive packages (leading to reduced costs for the exhibitors)" is another or additional key driver mentioned by a majority of companies in several markets (Argentina, Colombia, Hong-Kong, Malaysia, Spain and USA).

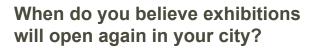
## **Operations - Reopening Exhibitions World**

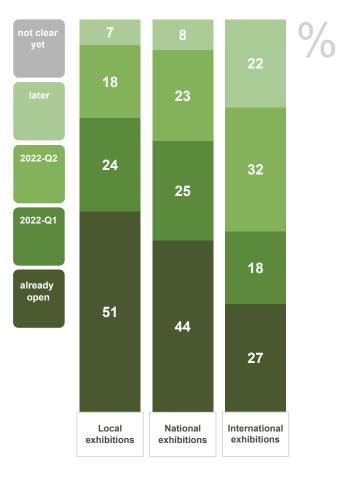
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



The Global Association of the Association of the

## **Operations - Reopening Exhibitions World**





## What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	70%	
Readiness of exhibiting companies and visitors to participate again	54%	
Mid-term visibility in terms of public policies, including travel restrictions	49%	
Lift of current public policies that apply locally to exhibitions	47%	
Financial incentive packages (leading to reduced costs for the exhibitors)	41%	
Relevant hygiene measures	21%	
Other	5%	

The Global Association of the Exhibition Industry

## **Turnover - Operating profits**



The 28th Barometer surveyed the participants' production for their company's 2021 gross turnover and expectations for 2022, when compared to 2019. The survey also questioned the evolution of operating profits for 2021 compared to 2019 and 2020.

#### The following charts present:

- revenues from 2021, and projections for the full year 2022 compared to 2019, on average for all companies, and also broken down per level of revenue realised (0% compared to revenues of 2019, less than 25%, etc.).
- the evolution of operating profits 2021 compared to those for 2020 and to those for 2019.

Globally, and on average, companies saw a 2021 turnover of just 41% of 2019 levels, and project that this will increase to 71%, of the same baseline, in 2022. Still, many countries are performing well above average, including:

- For 2021 revenues: France (62% of 2019 level's), Russia (61%), China (60%), Japan (55%), South Korea (54%), UAE (53%) and Spain (50%).
- For projected 2022 revenues: USA (84% of 2019 levels), Brazil and France (79%), Spain (78%), Colombia, China and Japan (77%), and Thailand and UK (76%).

In terms of operating profit for 2021, 27% of companies globally reported a loss, and 26% reported a reduction of more than 50%, compared to 2019 levels. All regions include countries with a higher than average proportion of companies declaring a loss in 2021:

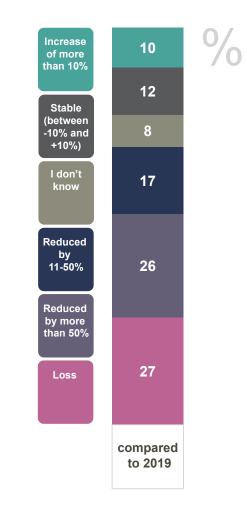
- Mexico (33% of companies) in North America.
- Argentina (50%), Brazil (44%), Chile (38%) and Colombia (42%) in Central and South America.
- Germany (44%) in Europe.
- South Africa (36%) in the Middle East and Africa.
- Australia (30%), India (29%), Malaysia (38%), Singapore (40%) and Thailand (38%) in the Asia-Pacific.

## **Turnover - Operating Profits** World

**Revenue compared to 2019** Average for all companies 2022: 71% 54% 2021: 41% 36% 34% 30% 21% 10% 8% 5% 1% 0% 50-75% 0% less than 25% 25-49% more than 75% 2021 2022

**Operating Profits 2021** 

The Global Association of the Exhibition Industry



## **Public Financial Support**

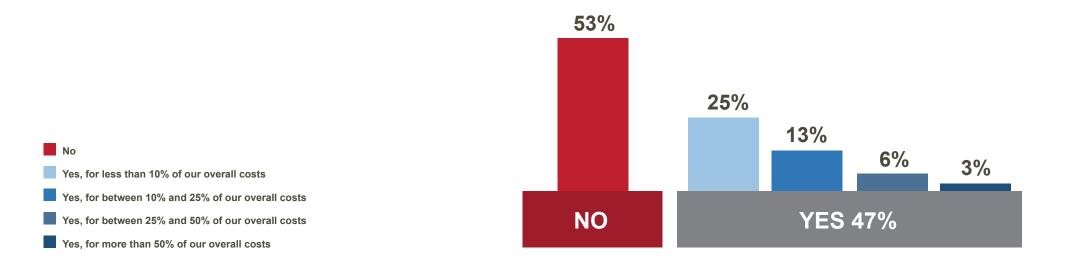


The 28th Barometer surveyed the impact of the COVID-19 crisis regarding public financial support. Overall, 53% of companies received no public financial support, and for the majority of those who did, financial public aid represented less than 10% of their overall costs.

In terms of proportion of companies who've received no public financial support, the Asia-Pacific matches the global average of 53%. In Europe, this proportion is lower than the global average (33%), but is higher in the Middle East and Africa (78%), North America (73%) and Central and South America (68%).

## Public Financial Support World

# Did your company benefit from public financial support?



The Global Association of the Exhibition Industry

### **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 previous edition of the Barometer, released in the summer of 2021, "Impact of the COVID-19 pandemic on the business" remains the most pressing business issue – although this has dropped to 19% of respondents, from 29%, six months ago. There has also been a shift in the second and third most pressing issues, with "Internal management challenges" (19% of respondents, compared to 9%, six months ago) and "Impact of digitalisation" (16%, compared to 10%, six months ago) forming the top three. "Competition with other media" is now the fourth most pressing issue (14%, compared to 5%, six months ago) while "State of the economy in home market" drops to fifth spot (12%), from being the second most pressing issue just six months ago (19% of respondents).

The three components of "Internal management challenges" are all almost equally represented within the responses: "Human resources" (56% of respondents), "Business model adjustments" (54%) and "Finance" (48%). "Internal management challenges" represents the key business issue across Australia, Argentina and Mexico (22% of respondents), Spain (21%), Colombia (20%), Thailand (19%) and South Africa (18%).

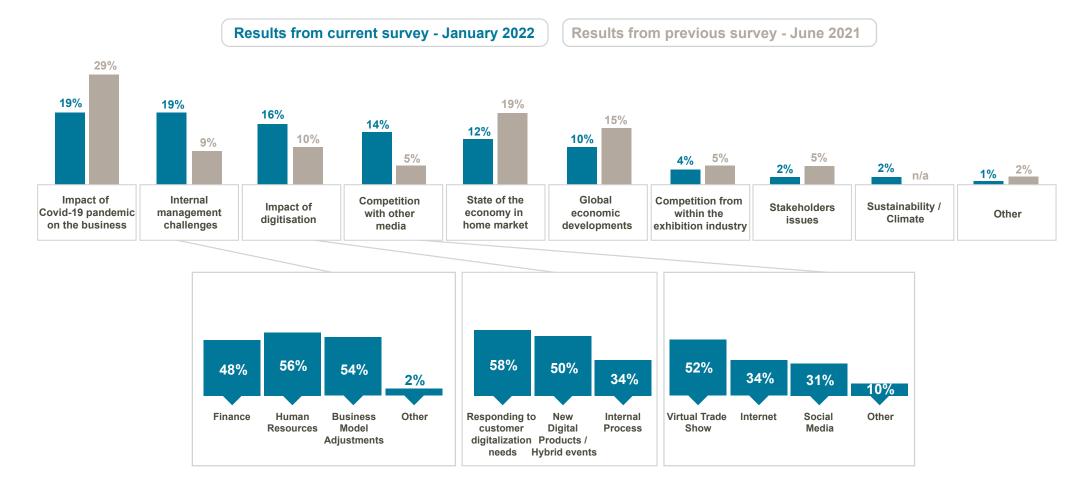
In Germany, "Impact of digitalisation" is matched with "Impact of the COVID-19 pandemic on the business" as the most pressing issue (20% of respondents).

The picture is different depending on the activity type of respondents. ("Organiser", "Venue only" and "Service provider only").

For organisers and venues "Impact of COVID-19 pandemic on the business" is the top issue (20% and 19% of respondents respectively), followed closely by "Internal management challenges" (18% for both categories) and "Impact of digitalisation" (17% and 14%).

Service providers, however, rank "Internal management challenges" (21% of respondents) ahead of "Impact of COVID-19 pandemic on the business", "Impact of digitalisation" and "Competition with other media" (16% of respondents for each).

## Top Issues World



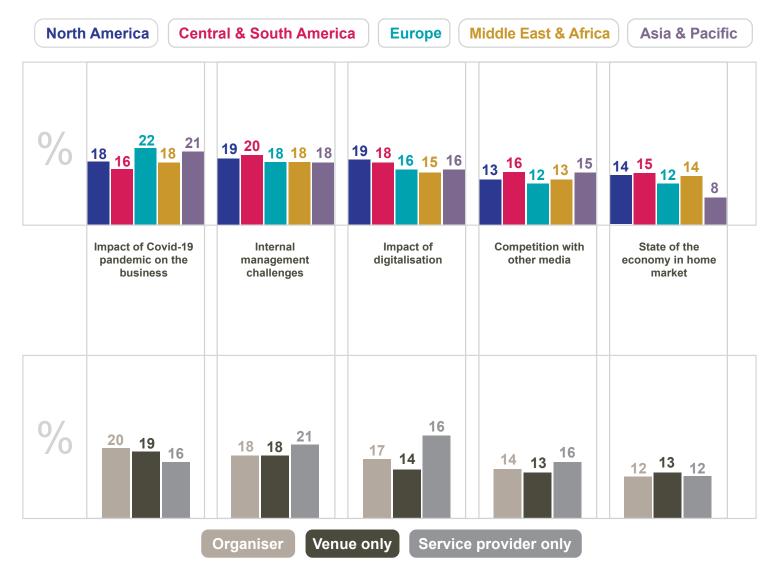
(multiple answers possible)

The Global Association of the Explosition Industry

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

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#### Actions put in place



## Format of Exhibitions in the Coming Years

The Global Association of the Exhibition Industry

The 28th 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 previous editions of this research, the comparisons allow to identify trends.

#### The global results indicate that:

- 80% of respondents (up from 78%, six months ago, and 64%, 12 months ago) agree that "COVID-19 confirms the value of face-to-face events", and anticipate the sector to bounce back quickly (with 38% stating "Yes, for sure" and 42% stating "Most probably"). Meanwhile,13% of respondents are unsure.
- 44% (compared to 46%, six months ago, and 63%, 12 months ago) believe there will be "Less international 'physical' exhibitions, and, overall, less participants" (with 6% stating "Yes, for sure" and 38% stating "Most probably"), while 30% are unsure.
- 73% (compared to 76%, six months ago, and 80%, 12 months ago) believe there is "A push towards hybrid events, more digital elements at events" (with 24% stating "Yes, for sure" and 49% stating "Most probably"), while 15% are unsure.
- 10% (compared to 11%, six months ago, and 14%, 12 months ago) agree that "Virtual events are replacing physical events" (with 2% stating "Yes, for sure" and 9% stating "Most probably"), while 18% are unsure and 54% state "Definitely not".

The results show no significant differences across different regions.

## Format of Exhibitions in the Coming Years World

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

The Global Association of the Exhibition Industry

Covid-19 confirms the value of face to face events - sector bounces back quickly	38%		42%	1	3% <mark>4%</mark> 2%	
Less international "physical" exhibitions, and overall less participants	6% 38%		30%	14%	12%	
A push towards "hybrid" events, more digital elements at events		24%		49%	15%	8% 4%
"Virtual" events replacing "physical" events	<mark>2% 9%</mark>	18%	17%	5	54%	

## **Climate Change and Net Zero Carbon Events**

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Climate change has become a priority for the events industry, with the launch of the "Net Zero Carbon Events initiative" supported by the UNFCCC (<u>www.netzerocarbonevents.org</u> for more information). The following page presents a graphic on the perception and engagement of the industry on this issue.

#### **Global results indicate that:**

- 66% of respondents are confident that "This initiative is of key relevance to secure the future of the industry" (28% "Yes, for sure" and 38% "Most probably"), while 25% are "Not sure".
- 91% of companies agree that "It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)" (53% "Yes, for sure" and 37% "Most probably"), and 6% are "Not sure".
- 89% of companies considers that "It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events" (48% "Yes, for sure" and 41% "Most probably") and 8% are "Not sure".

Regarding the deadline for companies to achieve Net Zero Greenhouse Gas emissions:

• 23% of respondents are sure "My company will achieve Net Zero Greenhouse Gas emissions before 2050", while 31% believe this is "Most probably" the case and 33% are unsure.

69% of respondents are confident that "My company will achieve Net Zero Greenhouse Gas emissions by 2050" (with 41% stating "Yes, for sure" and 28% stating "Most probably"), while 24% are unsure Country results highlight a significant specificity about the first question: compared to the global average (66%) a much lower proportion of companies in Russia (27%), Japan and Turkey (44%) or Germany and Singapore (50%) consider – "For sure" or "Most probably" – that "This initiative ["Net Zero Carbon Events initiative"] is of key relevance to secure the future of the industry".

Also, when looking at the deadline for companies to achieve Net Zero Greenhouse Gas emissions, and comparing to the global average (54%) a much higher proportion of companies are confident – "For sure" or "Most probably" – that "My company will achieve Net Zero Greenhouse Gas emissions before 2050": Chile (86%), UK (85%), UAE (83%), South Africa (73%), Spain (71%), Argentina (69%), Mexico (62%) and Australia (60%).

# Climate Change and Net Zero Carbon Events

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

This initiative is of key relevance to secure the future of the industry	28% 38%		3%	25%	7% 2%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	53%		3%		6%2%1
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	48%		41%		8% 1% <mark>2</mark> %
My company will achieve Net Zero Greenhouse Gas emissions by 2050	41%		28%	24%	5% 2%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	23%	31%		33%	10% 3%

## Part 2: Detailed results for 5 regions and 24 markets

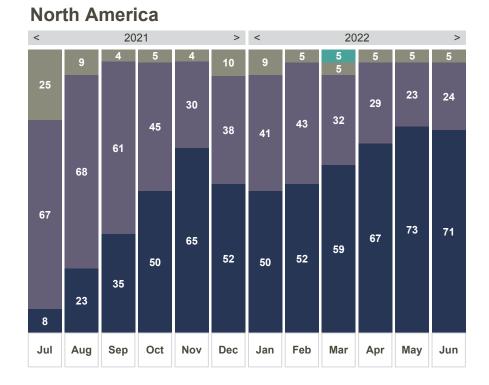


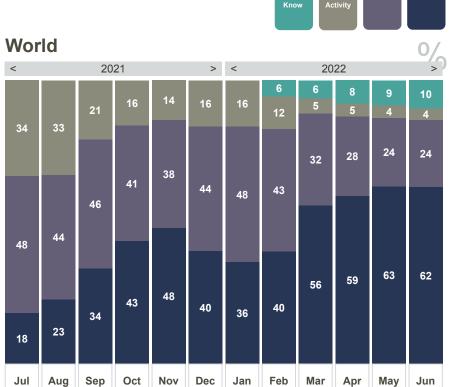
North America:	Mexico US
Central & South America:	Argentina Brazil Chile Colombia
Europe:	France Germany Italy Russian Federation Spain Turkey United Kingdom
Middle East & Africa:	UAE South Africa
Asia-Pacific:	Australia China Hong Kong India Japan Malaysia Singapore South Korea Thailand



### **Operations - Reopening Exhibitions** North America

#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





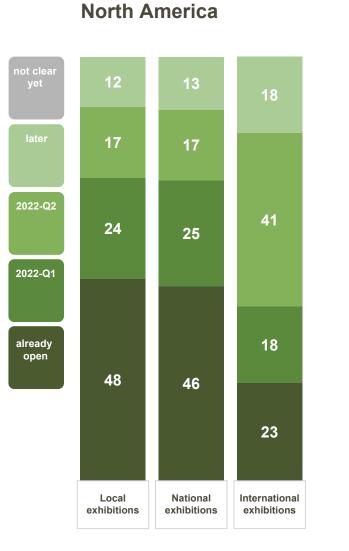
I Don't Know

The Global Association of the

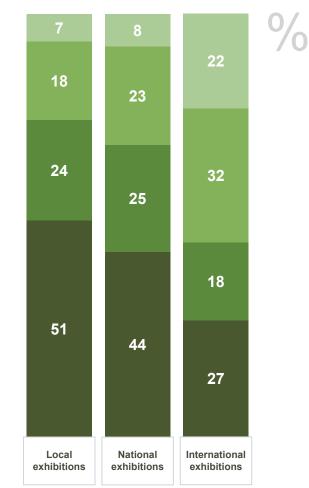
## **Operations - Reopening Exhibitions North America**



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



World

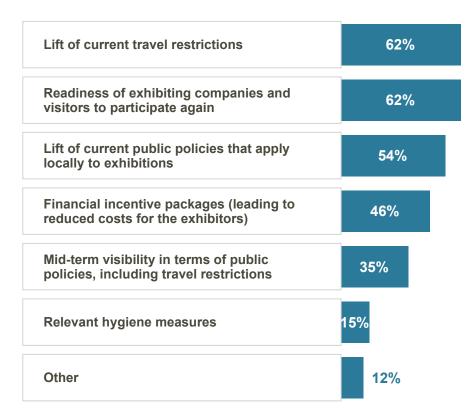


## **Operations - Reopening Exhibitions North America**



#### What do you believe would most help the "bounce back" of exhibitions?

#### **North America**



#### World

Lift of current travel restrictions	70%
Readiness of exhibiting companies and visitors to participate again	54%
Mid-term visibility in terms of public policies, including travel restrictions	49%
Lift of current public policies that apply locally to exhibitions	47%
Financial incentive packages (leading to reduced costs for the exhibitors)	41%
Relevant hygiene measures	21%
Other	5%

## Turnover North America

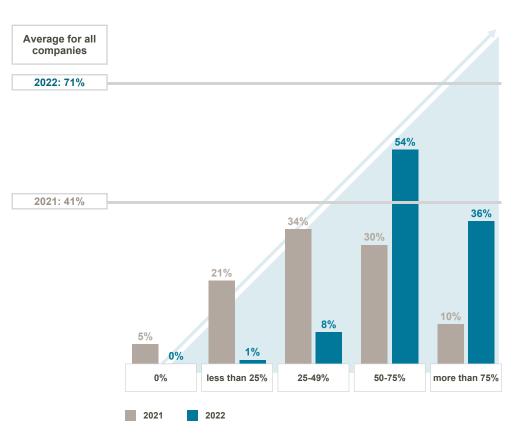
**North America** 



#### **Revenue compared to 2019**

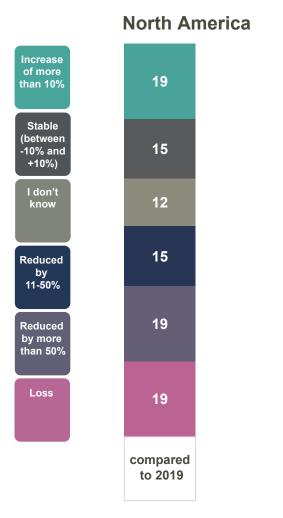
#### 2022: 79% Average for all companies 54% 2021: 47% 38% 38% 25% 17% 13% 8% 4% 4% 0% 0% less than 25% 25-49% 50-75% more than 75% 2021 2022

#### World

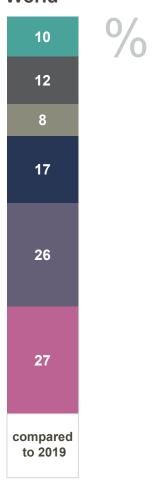


## Operating profit 2019 North America









## Public Financial Support North America



# Did your company benefit from public financial support?

 North America
 World

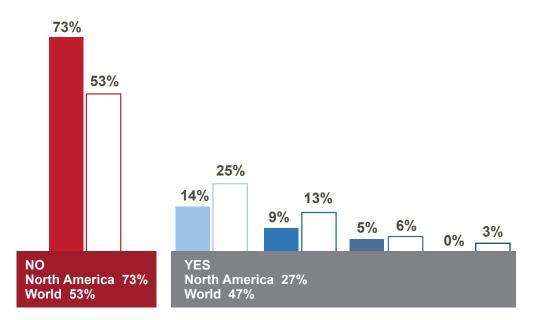
 No

 Yes, for less than 10% of our overall costs

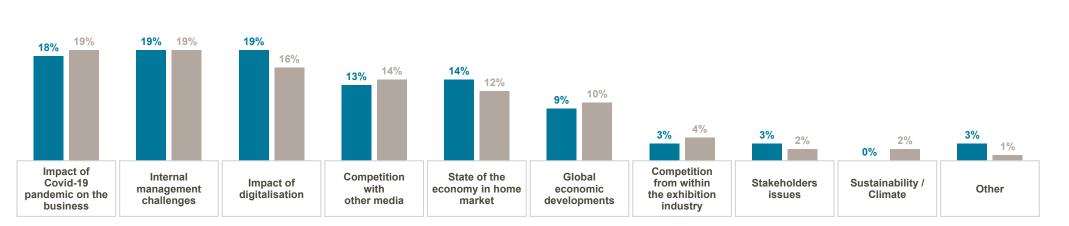
 Yes, for between 10% and 25% of our overall costs

 Yes, for between 25% and 50% of our overall costs

 Yes, for more than 50% of our overall costs



# Most Important Business Issues -Format of Exhibitions - North America



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

4% 28% 40% 20% 8% Covid-19 confirms the value of face to face events - sector bounces back quickly 8% 16% 20% 36% 20% Less international "physical" exhibitions, and overall less participants 32% A push towards "hybrid" events, more digital elements at events 28% 20% 12% 8% 8% 4% "Virtual" events replacing "physical" events 16% 32% 40%

**North America** Global

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

## Climate Change and Net Zero Carbon Events North America

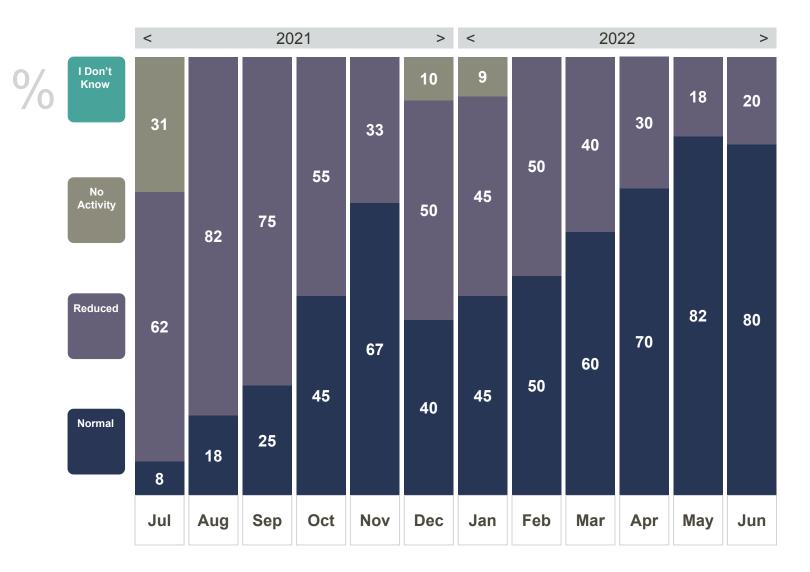


**Climate Change and Net Zero Carbon Events** 

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

This initiative is of key relevance to secure the future of the industry	32%	32%	32%	4%		
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	60%		36%	4%		
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		60%	32% 8	8%		
My company will achieve Net Zero Greenhouse Gas emissions by 2050	24% 36%		24% 36%		40%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	32%	24%	44%			

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

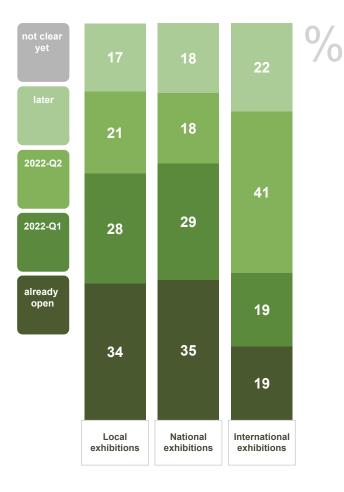


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#### The Global Association of the Exhibition Industry

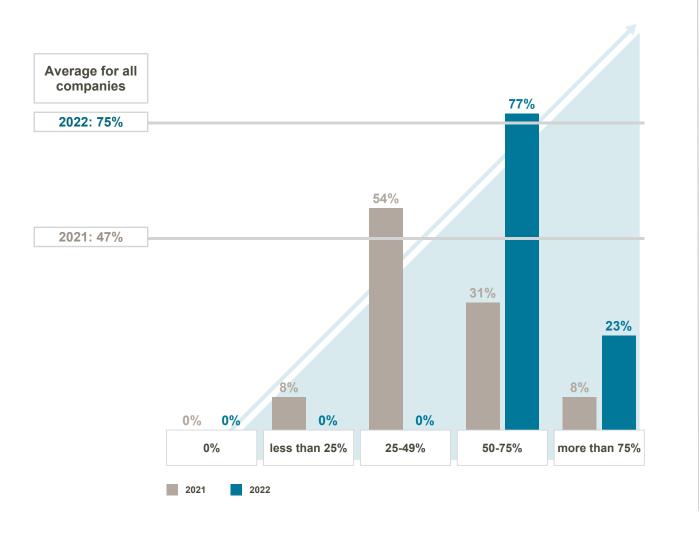
When do you believe exhibitions will open again in your city?



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

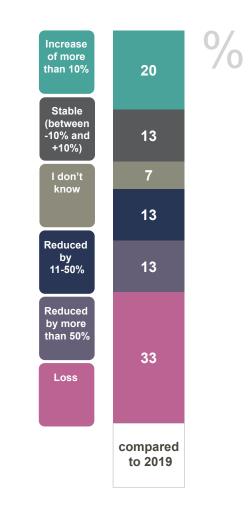
Readiness of exhibiting companies and visitors to participate again	79%	
Lift of current public policies that apply locally to exhibitions	64%	
Lift of current travel restrictions	50%	
Financial incentive packages (leading to reduced costs for the exhibitors)	43%	
Mid-term visibility in terms of public policies, including travel restrictions	29%	
Relevant hygiene measures	14%	
Other	14%	

Revenue compared to 2019



**Operating Profits 2021** 

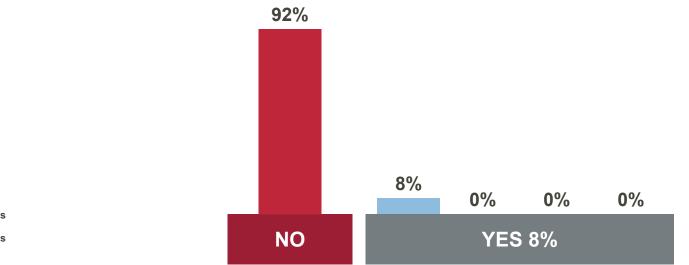
The Global Association of the Exhibition Industry





The Global Association of the Exhibition Industry

Did your company benefit from public financial support?

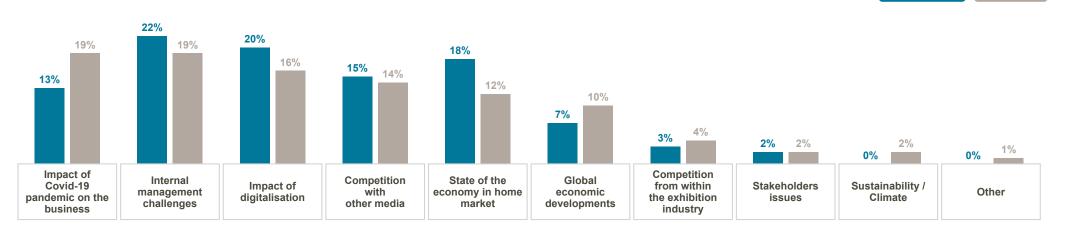


## No Yes, for less than 10% of our overall costs

Yes, for between 10% and 25% of our overall costs

Yes, for between 25% and 50% of our overall costs

Yes, for more than 50% of our overall costs



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

Mexico

Covid-19 confirms the value of face to face events - sector bounces back quickly	23%		46%	1	23%	8%
Less international "physical" exhibitions, and overall less participants	15%	15%		46%	8%	15%
A push towards "hybrid" events, more digital elements at events		46%		31%	8%	15%
"Virtual" events replacing "physical" events	8%	23%	3	8%	3	1%

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Global



#### **Climate Change and Net Zero Carbon Events**

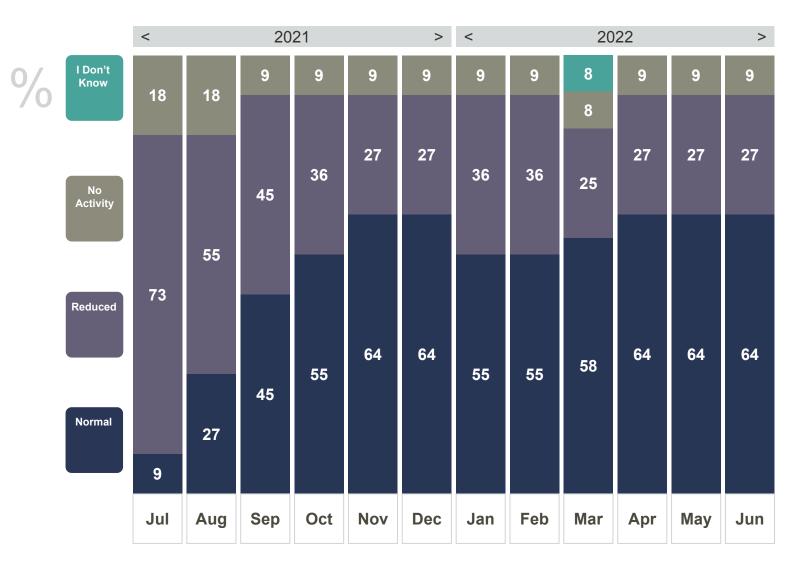
Yes, for sure Most probably Not sure Not sure at all Definitely not

This initiative is of key relevance to secure the future of the industry	38% 15%		15%		46%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	54%				38%	8%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	62%			31%	8%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	23% 46%		46%		31%	, D
My company will achieve Net Zero Greenhouse Gas emissions before 2050	38%		23%		38%	

## **Detailed results for US**



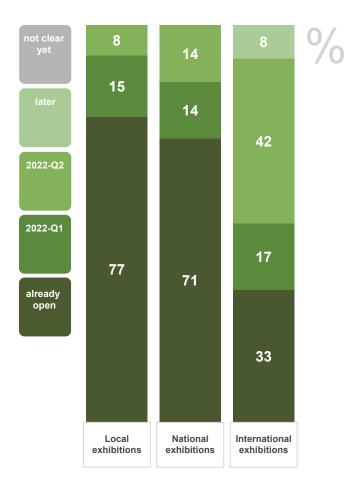
#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



## **Detailed results for US**



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



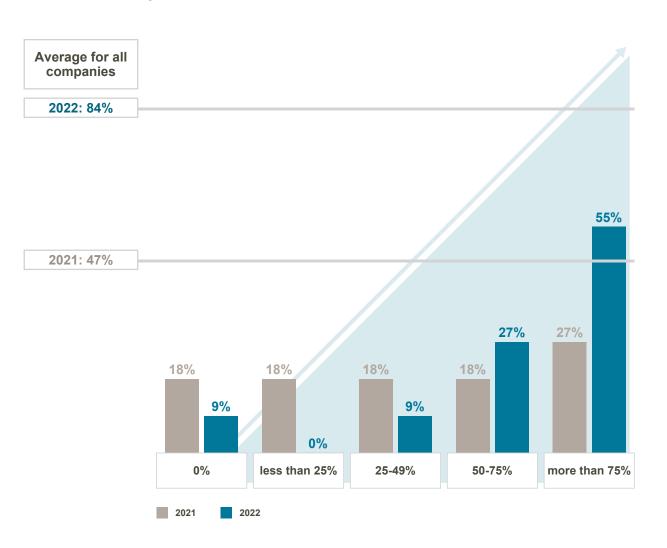
What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	75%
Financial incentive packages (leading to reduced costs for the exhibitors)	50%
Readiness of exhibiting companies and visitors to participate again	42%
Mid-term visibility in terms of public policies, including travel restrictions	42%
Lift of current public policies that apply locally to exhibitions	42%
Relevant hygiene measures	17%
Other	8%

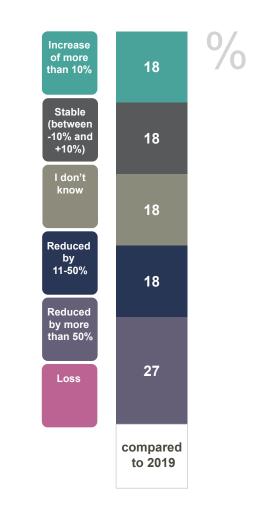




Revenue compared to 2019



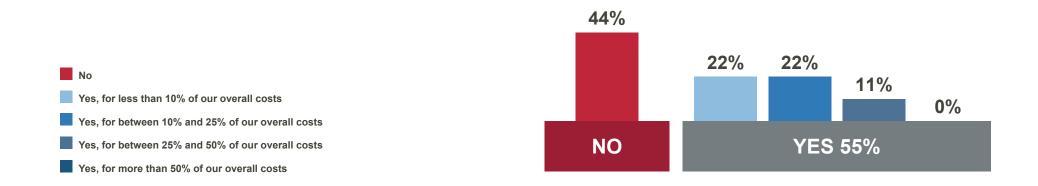
### **Operating Profits 2021**







Did your company benefit from public financial support?

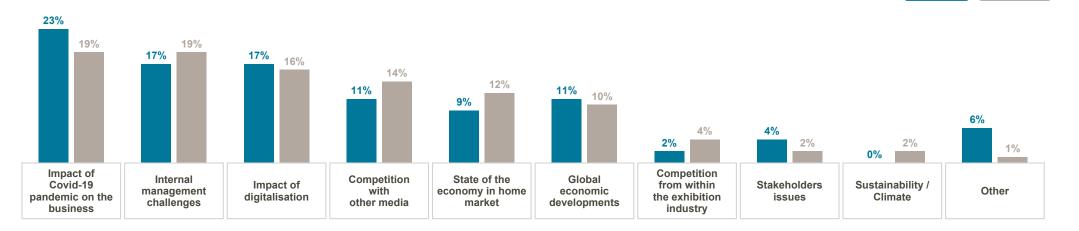






Global

USA



#### Most important business issues in the exhibition industry

Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly	33%		33	3%	17%	8% 8%
Less international "physical" exhibitions, and overall less participants	17%	25%		25%	8%	25%
A push towards "hybrid" events, more digital elements at events	17%	25%		33%		25%
"Virtual" events replacing "physical" events	17%	8% 25%		5% 50		, 0



### **Climate Change and Net Zero Carbon Events**

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

This initiative is of key relevance to secure the future of the industry	25%	50'	%	17%	8%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	67%			33%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	58%			3%	8%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	25% 25%		Ę	60%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	25% 25%		Ę	60%	

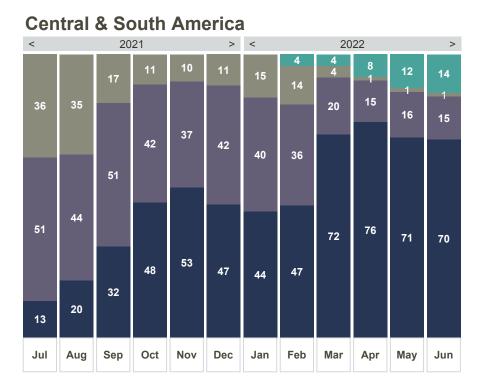
# Central & South America

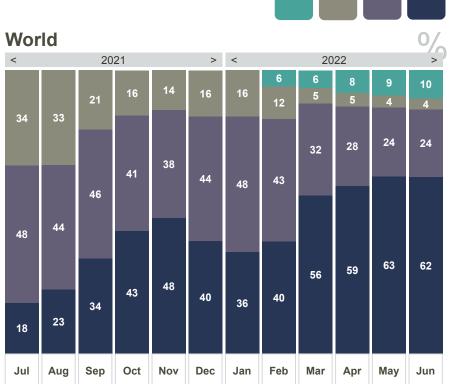
### **Operations - Reopening Exhibitions Central & South America**



Normal

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





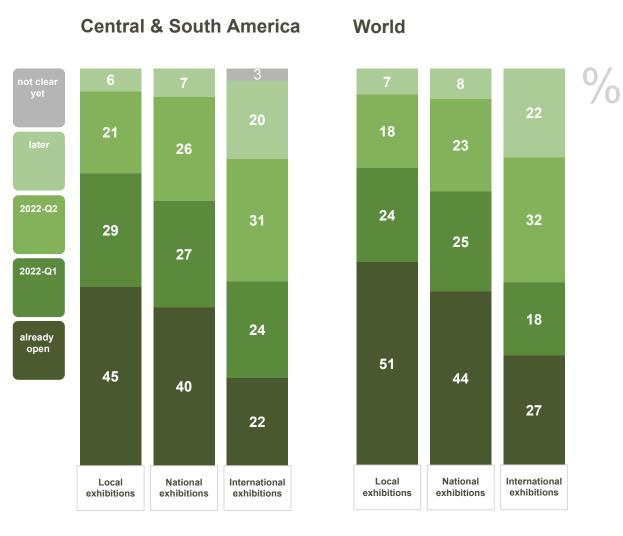
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Know

# **Operations - Reopening Exhibitions Central & South America**



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

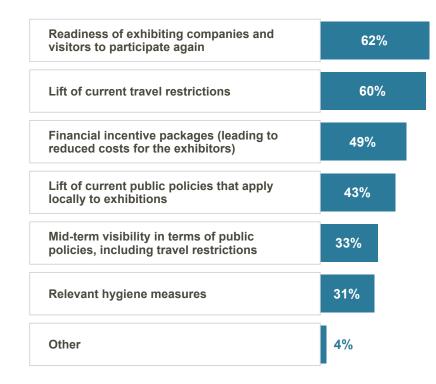


28th UFI Global Exhibition Barometer / February 2022 ©

### **Operations - Reopening Exhibitions Central & South America**



#### **Central & South America**



#### World

Lift of current travel restrictions	70%
Readiness of exhibiting companies and visitors to participate again	54%
Mid-term visibility in terms of public policies, including travel restrictions	49%
Lift of current public policies that apply locally to exhibitions	47%
Financial incentive packages (leading to reduced costs for the exhibitors)	41%
Relevant hygiene measures	21%
Other	5%

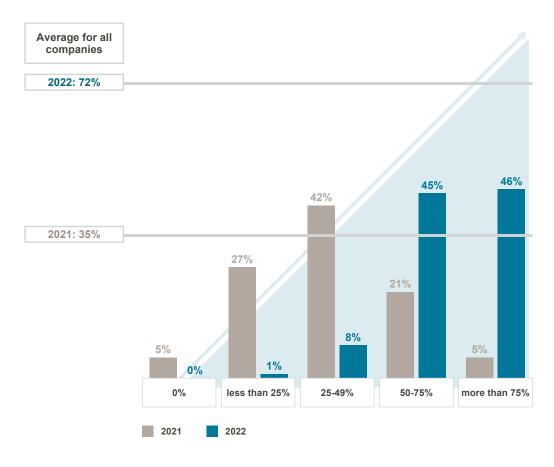
The Global Association of the Chibition Jeducter

### Turnover Central & South America

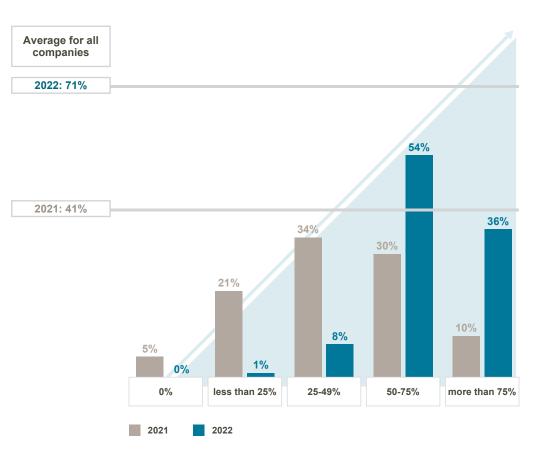


### **Revenue compared to 2019**

### **Central & South America**

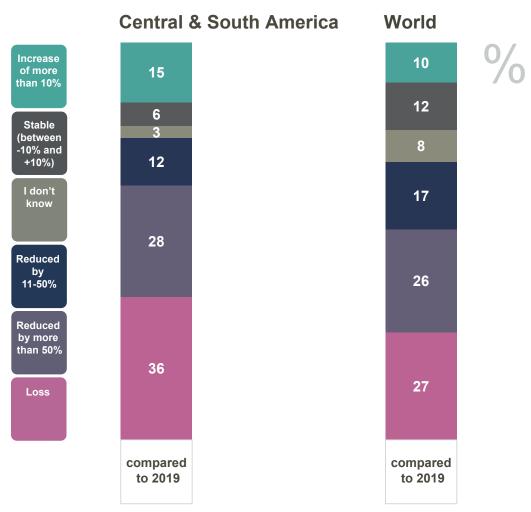


### World



# Operating profit 2019 Central & South America



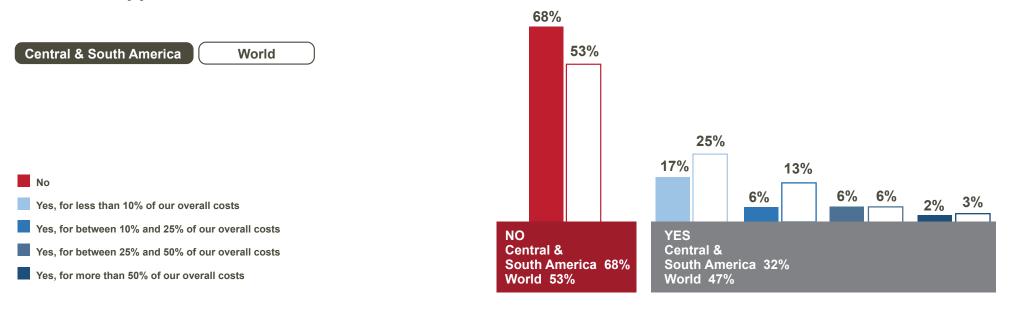


46

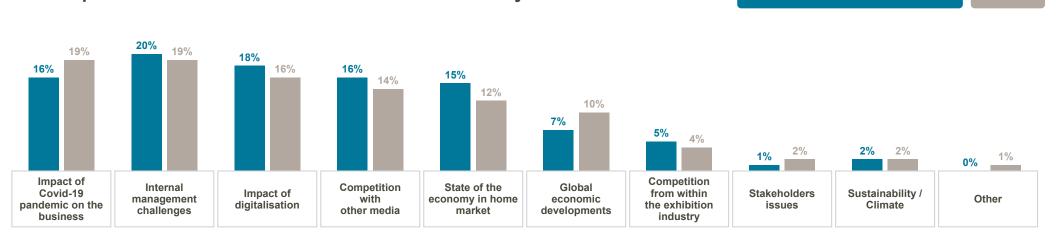
# Public Financial Support Central & South America



# Did your company benefit from public financial support?



### 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

38% 36% 7%19 18% Covid-19 confirms the value of face to face events - sector bounces back quickly 5% Less international "physical" exhibitions, and overall less participants 35% 32% 13% 15% A push towards "hybrid" events, more digital elements at events 33% 53% 8% 1% 5% 12% 24% 14% "Virtual" events replacing "physical" events 4% 46%

Central & South America Global

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



# Climate Change and Net Zero Carbon Events Central & South America

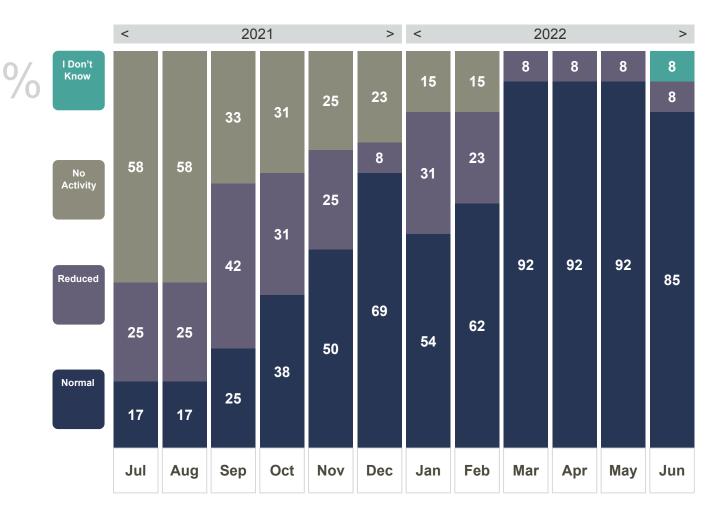


**Climate Change and Net Zero Carbon Events** 

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

This initiative is of key relevance to secure the future of the industry	37% 38%			17% 2 <mark>%</mark> 6%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)		26	5% 2% <sup>1%</sup>	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	59%			8% 2%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	23% 46%		2	5% 6%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	23%	41%	24%	9% 2%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

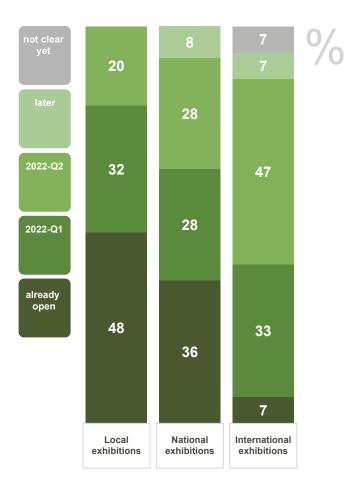


The Global Association of the Association Industry





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



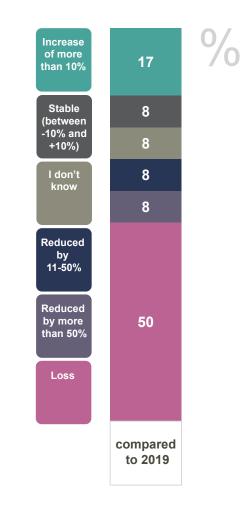
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	77%
Readiness of exhibiting companies and visitors to participate again	69%
Financial incentive packages (leading to reduced costs for the exhibitors)	69%
Mid-term visibility in terms of public policies, including travel restrictions	38%
Lift of current public policies that apply locally to exhibitions	15%
Relevant hygiene measures	15%
Other	0%

**Revenue compared to 2019** Average for all companies 2022: 72% 62% 46% 31% 2021: 30% 23% 15% 8% 8% 8% 0% 0% 0% 50-75% less than 25% 25-49% more than 75% 2021 2022

### **Operating Profits 2021**

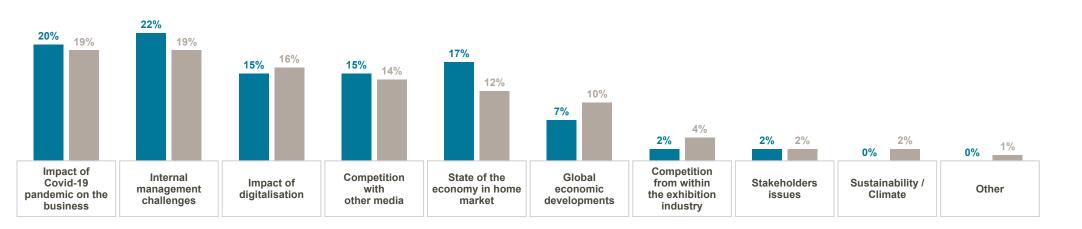
The Global Association of the Exhibition Industry





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

Format of exhibitions in the coming years

23% 69% 8% Covid-19 confirms the value of face to face events - sector bounces back quickly Less international "physical" exhibitions, and overall less participants 62% 31% 8% 31% 54% A push towards "hybrid" events, more digital elements at events 8% 8% 8% 31% 23% 38% "Virtual" events replacing "physical" events

Argentina

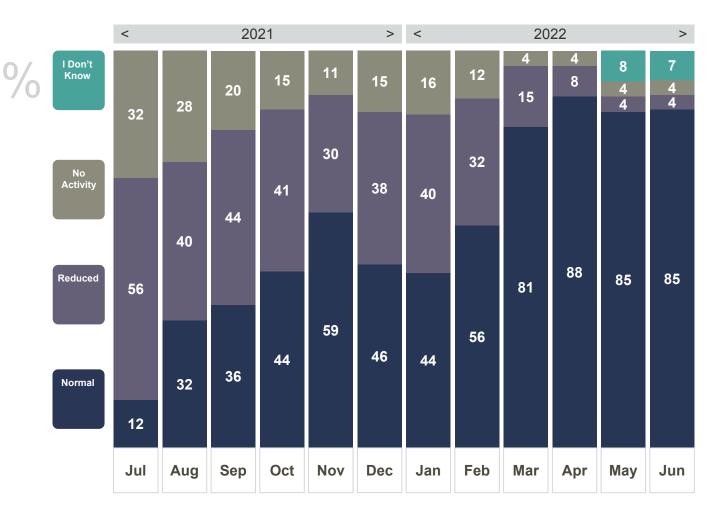
Yes, for sure Most probably Not sure Not sure at all Definitely not

Global



Climate Change and Net Zero Carbon Events		Yes, for sure Most proba	oly Not sure	Not sure at all	Definitely not
This initiative is of key relevance to secure the future of the industry	23%	46%		23%	8%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	46% 46			%	8%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	4	6%	54%		
My company will achieve Net Zero Greenhouse Gas emissions by 2050	31% 46%		15%	8%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	15%	54%		23%	8%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

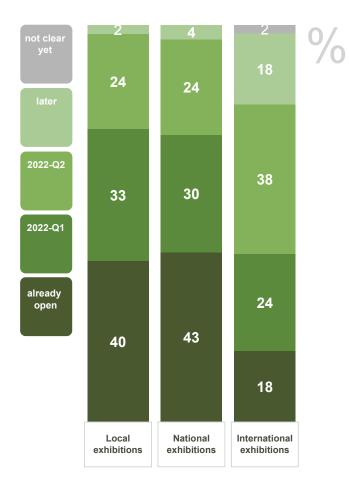


The Global Association of the Association of the





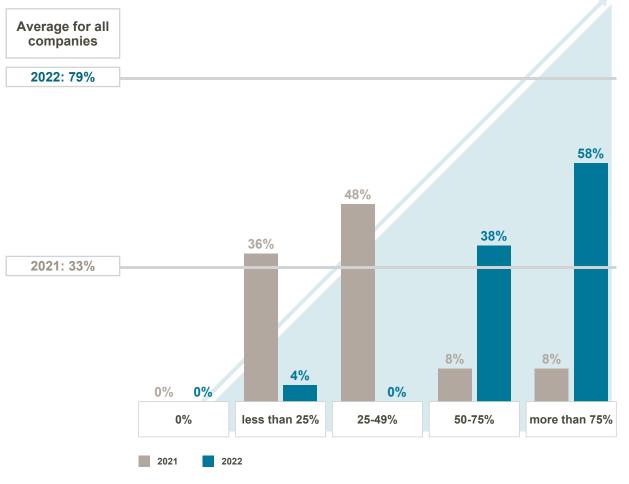
# When do you believe exhibitions will open again in your city?



# What do you believe would most help the "bounce back" of exhibitions?

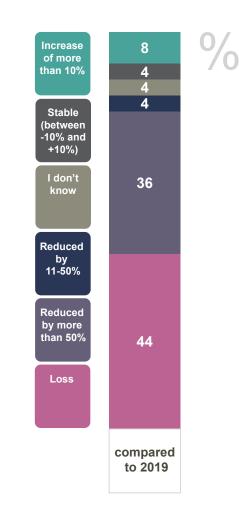
Lift of current public policies that apply locally to exhibitions	60%
Lift of current travel restrictions	57%
Readiness of exhibiting companies and visitors to participate again	50%
Financial incentive packages (leading to reduced costs for the exhibitors)	37%
Relevant hygiene measures	37%
Mid-term visibility in terms of public policies, including travel restrictions	33%
Other	7%

Revenue compared to 2019



**Operating Profits 2021** 

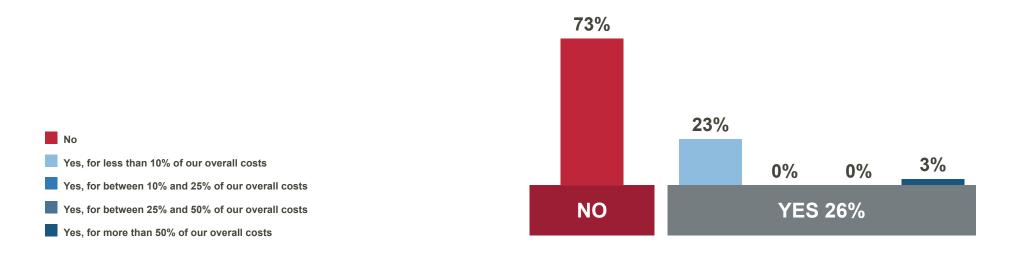
The Global Association of the Association of the

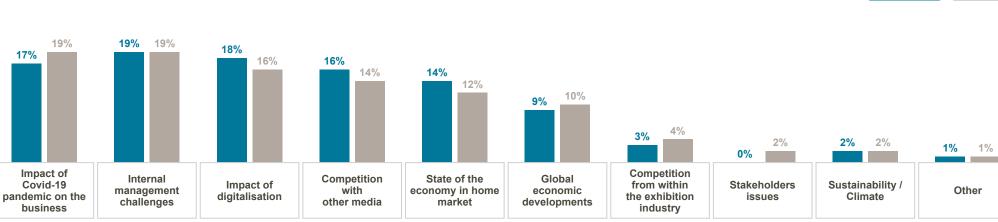






Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly		38%	24%		24%	14%
Less international "physical" exhibitions, and overall less participants	<mark>4%</mark>	36%	21%	7%	32%	
A push towards "hybrid" events, more digital elements at events		52%		34%	%	10% 3%
"Virtual" events replacing "physical" events	<mark>4%</mark> 7%	11% 7%		71%		



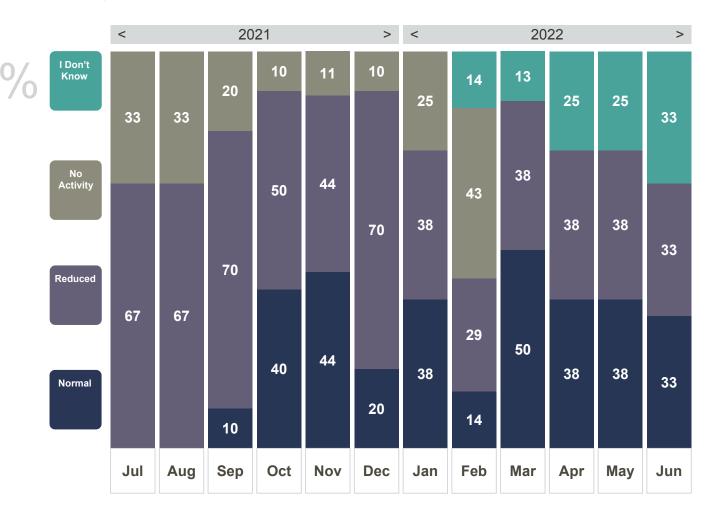
#### **Climate Change and Net Zero Carbon Events**

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

This initiative is of key relevance to secure the future of the industry	38% 349			%	14%	3%	10%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)		69%			28%	)	3%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		48%		34%		10%	7%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	11% 50%			32%		7%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	15%	41%		30%	6	11%	% 4%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

×

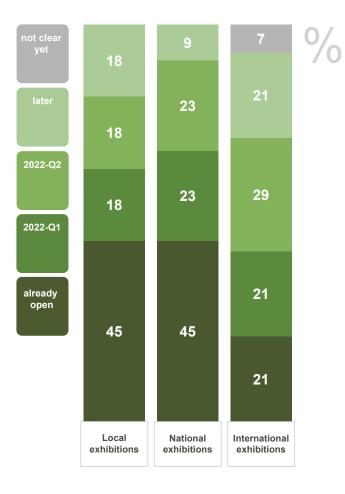


The Global Association of the Association of the





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

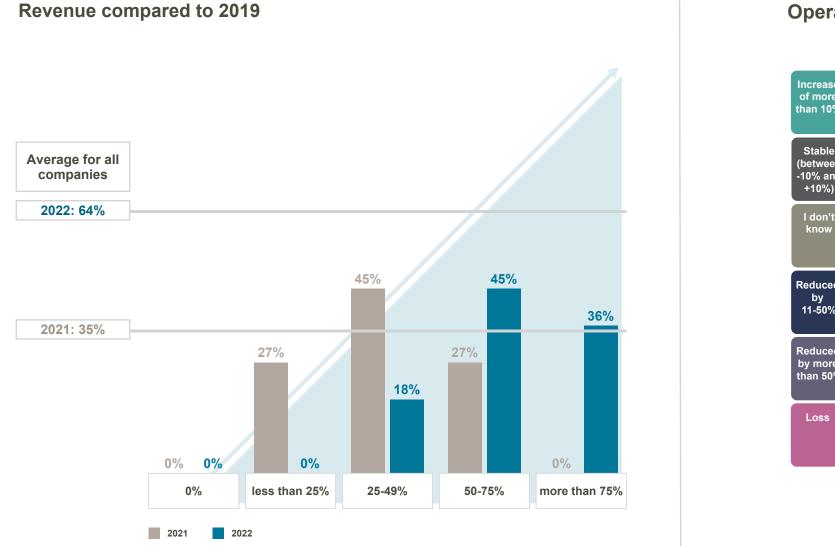


# What do you believe would most help the "bounce back" of exhibitions?

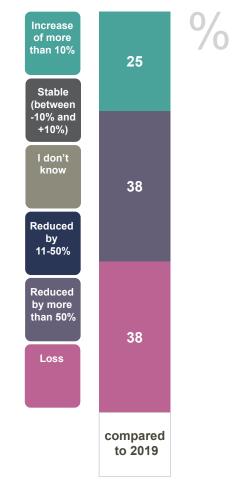
Lift of current travel restrictions	73%
Lift of current public policies that apply locally to exhibitions	64%
Readiness of exhibiting companies and visitors to participate again	36%
Mid-term visibility in terms of public policies, including travel restrictions	36%
Financial incentive packages (leading to reduced costs for the exhibitors)	36%
Relevant hygiene measures	36%
Other	0%

 $\star$ 





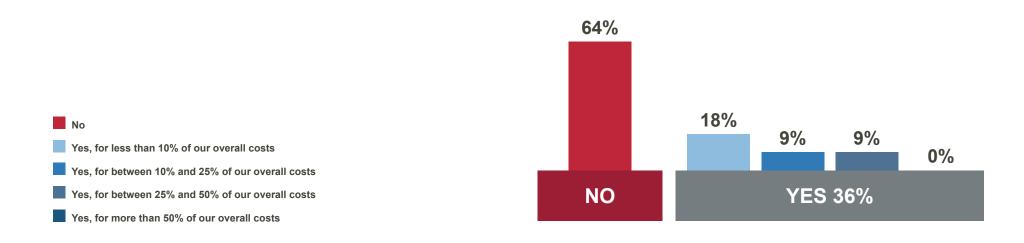
**Operating Profits 2021** 



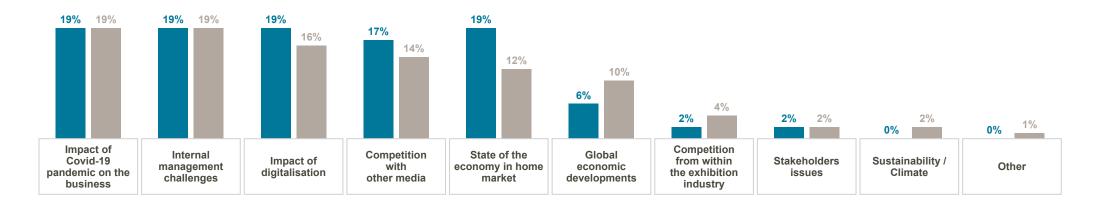
 $\star$ 



Did your company benefit from public financial support?



#### Most important business issues in the exhibition industry



### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly	22%	6	67%	11%
Less international "physical" exhibitions, and overall less participants	11%	22%	67%	
A push towards "hybrid" events, more digital elements at events	22% 78%			
"Virtual" events replacing "physical" events	11% 22%		56%	11%

Chile Global

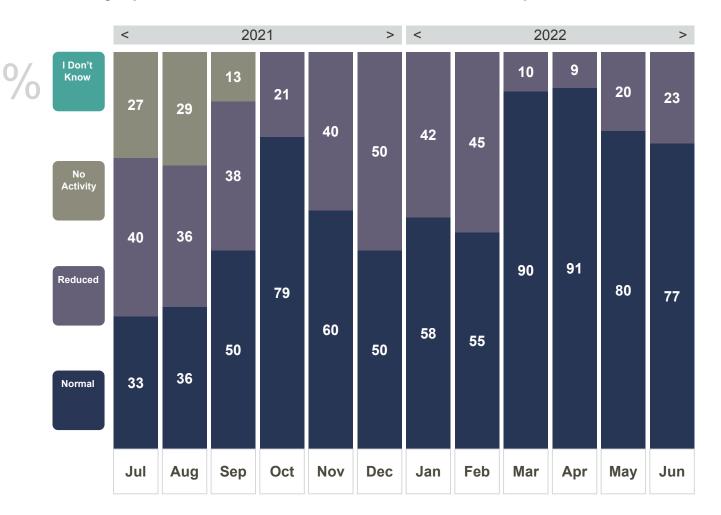
The Global Association of the Exhibition Industry



### **Climate Change and Net Zero Carbon Events**

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

This initiative is of key relevance to secure the future of the industry	33%	56%	11%
It is important that the event industry works together to reduce the event) environmental impact of the components it controls (production of the event)		22%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events			
My company will achieve Net Zero Greenhouse Gas emissions by 2050	25%	13%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	43%	43%	14%

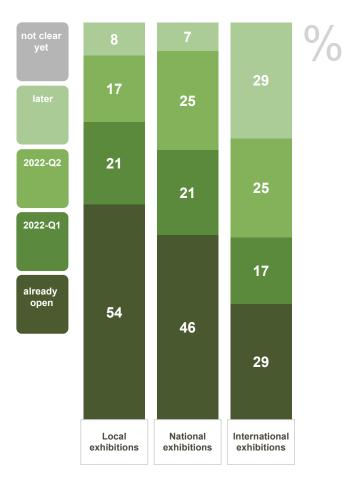


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

The Global Association of the Association of the



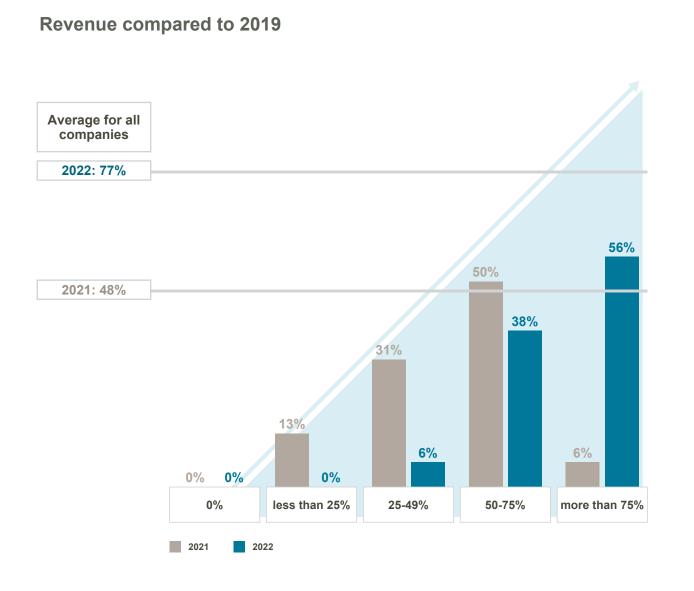
# When do you believe exhibitions will open again in your city?



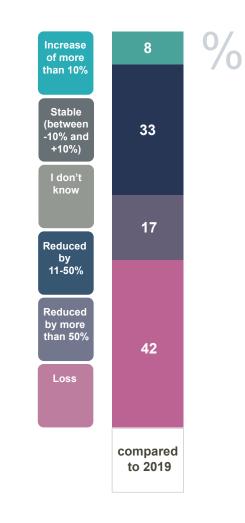
# What do you believe would most help the "bounce back" of exhibitions?

Readiness of exhibiting companies and visitors to participate again	78%		
Lift of current travel restrictions	67%		
Financial incentive packages (leading to reduced costs for the exhibitors)	67%		
Relevant hygiene measures	22%		
Mid-term visibility in terms of public policies, including travel restrictions	17%		
Lift of current public policies that apply locally to exhibitions	17%		
Other	6%		

The Global Association of the Exhibition Industry

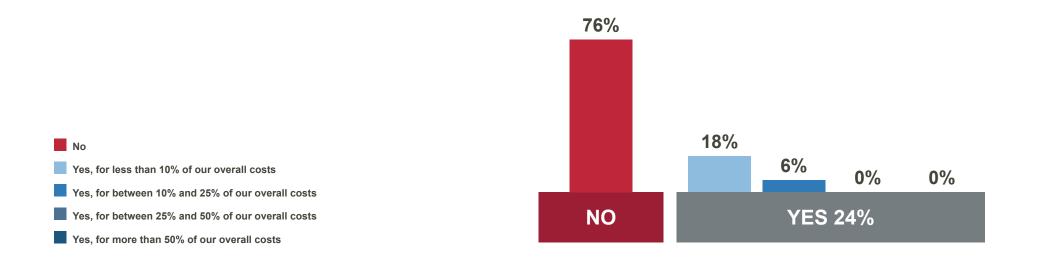


### **Operating Profits 2021**

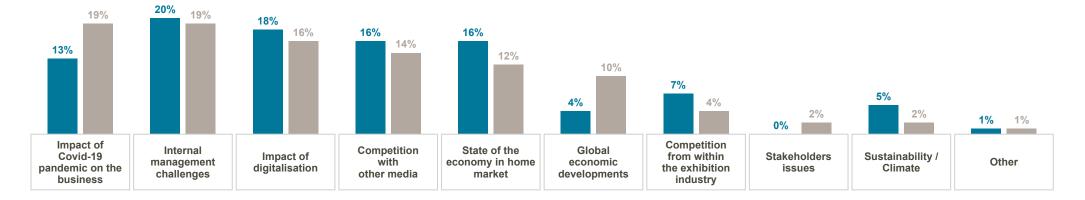




Did your company benefit from public financial support?







### Format of exhibitions in the coming years

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

Colombia

Global

Covid-19 confirms the value of face to face events - sector bounces back quickly	50%			31	31% 6%		13%
Less international "physical" exhibitions, and overall less participants	25%		38%		25%		13%
A push towards "hybrid" events, more digital elements at events	40		47%			7% 7%	
"Virtual" events replacing "physical" events	7% 27	%	27%		40%	6	

## **Detailed results for Colombia**



#### **Climate Change and Net Zero Carbon Events**

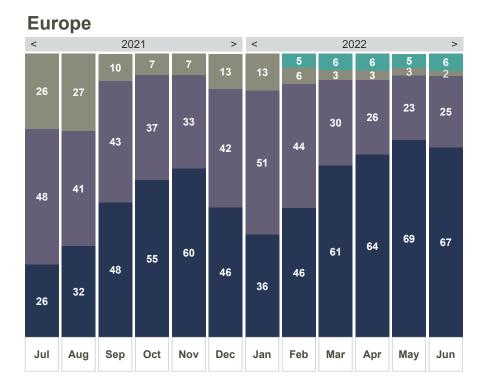
This initiative is of key relevance to secure the future of the industry	38% 38%		38%		19%	6%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	69%				25%	6%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	63%				%	13%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	19% 38%		%	38%		6%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	19%	38	%	38'	%	6%

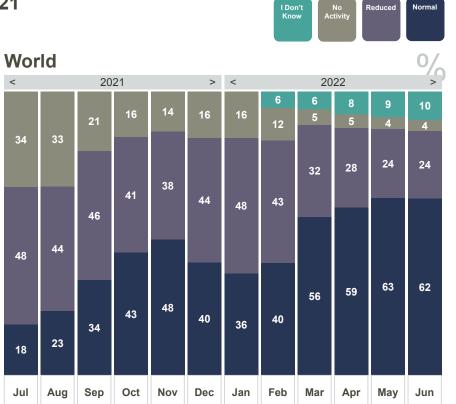


## **Operations - Reopening Exhibitions Europe**



Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

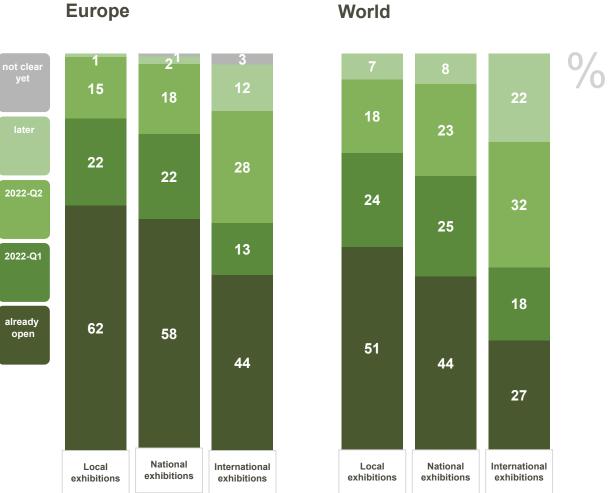




## **Operations - Reopening Exhibitions** Europe



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



World

## **Operations - Reopening Exhibitions Europe**



#### What do you believe would most help the "bounce back" of exhibitions?

#### Europe

Lift of current travel restrictions	63%
Readiness of exhibiting companies and visitors to participate again	59%
Mid-term visibility in terms of public policies, including travel restrictions	59%
Lift of current public policies that apply locally to exhibitions	45%
Financial incentive packages (leading to reduced costs for the exhibitors)	36%
Relevant hygiene measures	17%
Other	6%

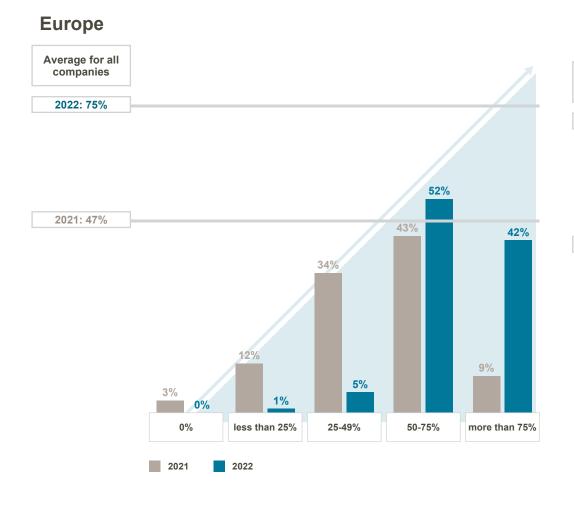
#### World

Lift of current travel restrictions	70%
Readiness of exhibiting companies and visitors to participate again	54%
Mid-term visibility in terms of public policies, including travel restrictions	49%
Lift of current public policies that apply locally to exhibitions	47%
Financial incentive packages (leading to reduced costs for the exhibitors)	41%
Relevant hygiene measures	21%
Other	5%

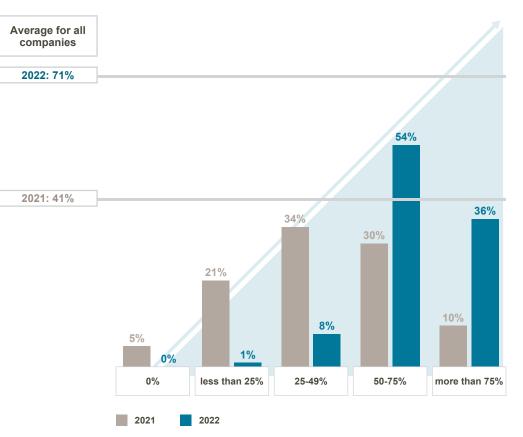
## Turnover Europe



### Revenue compared to 2019

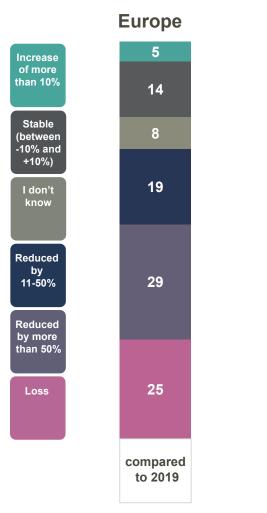


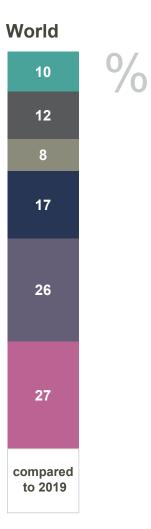
#### World



## Operating profit 2019 Europe



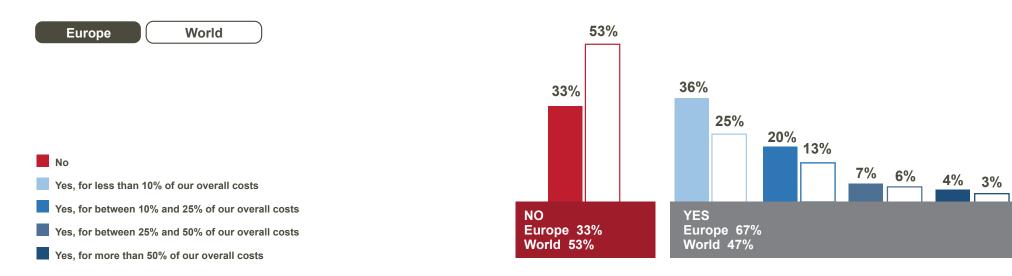




## Public Financial Support Europe



# Did your company benefit from public financial support?

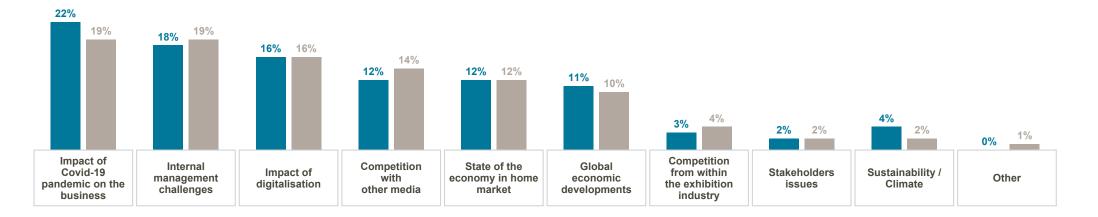


## Most Important Business Issues -Format of Exhibitions - Europe



Europe

Global



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

Covid-19 confirms the value of face to face events - sector bounces back quickly	41%			47%			<b>%</b> 4%	
Less international "physical" exhibitions, and overall less participants	5%		41%		25%	2'	1% 8'	%
A push towards "hybrid" events, more digital elements at events		19%		47%		18%	11%	4%
"Virtual" events replacing "physical" events	3%	19%	18%			60%		

## Climate Change and Net Zero Carbon Events Europe



#### **Climate Change and Net Zero Carbon Events**

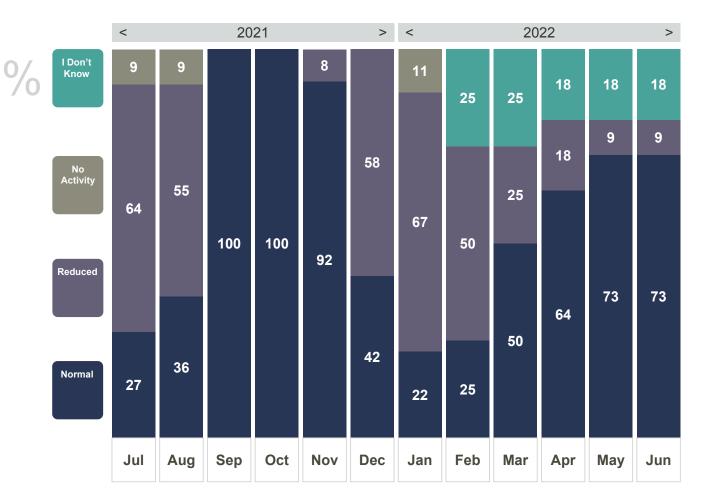
Yes, for sure Most probably Not sure Not sure at all Definitely not

1

This initiative is of key relevance to secure the future of the industry	26%	34%	26%	13% 1%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	539	%	37%	7% 2% <mark>1</mark> 9
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	50%		41%	8% 2%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	30% 34%		24%	8% 4%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	24%	32%	29%	11% 4%

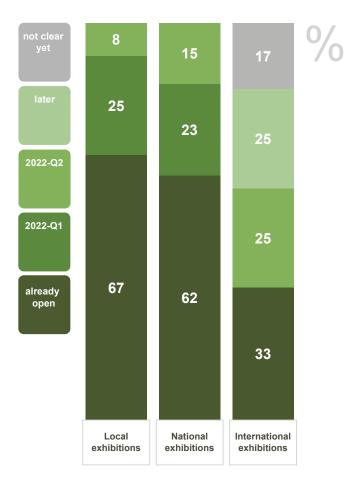


#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





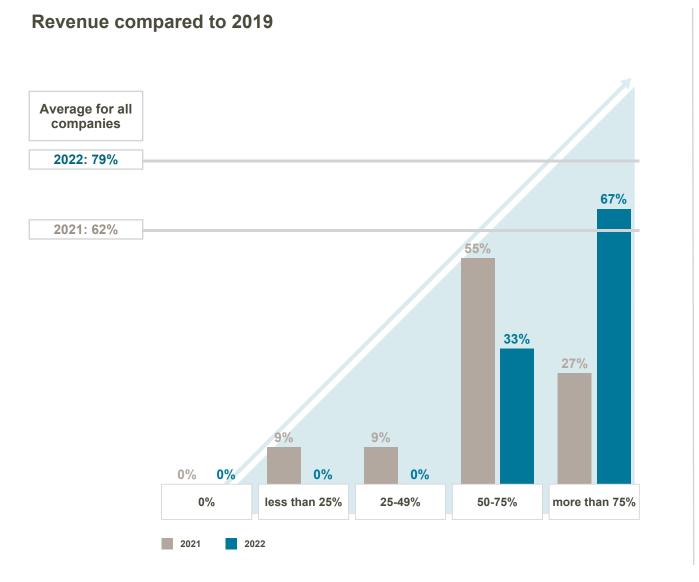
When do you believe exhibitions will open again in your city?



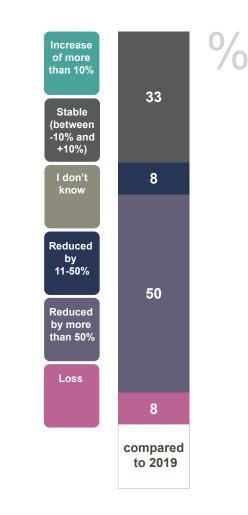
What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	83%
Mid-term visibility in terms of public policies, including travel restrictions	83%
Lift of current public policies that apply locally to exhibitions	58%
Readiness of exhibiting companies and visitors to participate again	42%
Financial incentive packages (leading to reduced costs for the exhibitors)	25%
Relevant hygiene measures	8%
Other	0%



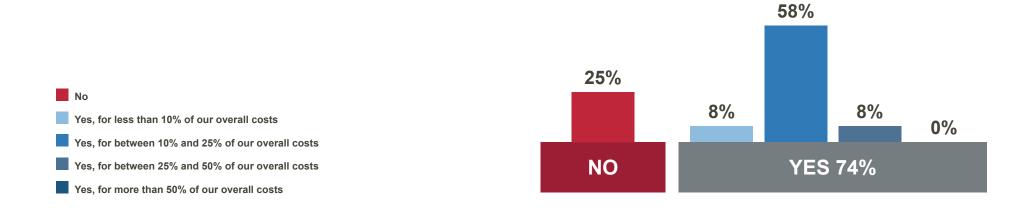


#### **Operating Profits 2021**

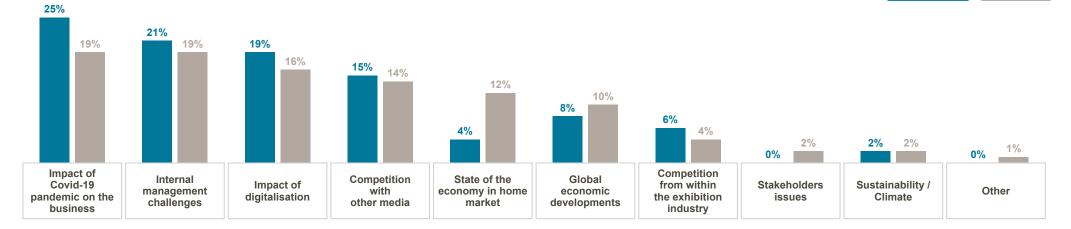




Did your company benefit from public financial support?



(12 answers in total)



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

33% 58% 8% Covid-19 confirms the value of face to face events - sector bounces back quickly Less international "physical" exhibitions, and overall less participants 58% 17% 25% 8% 58% 17% 8% A push towards "hybrid" events, more digital elements at events 8% 8% 42% 50% "Virtual" events replacing "physical" events

France

Global

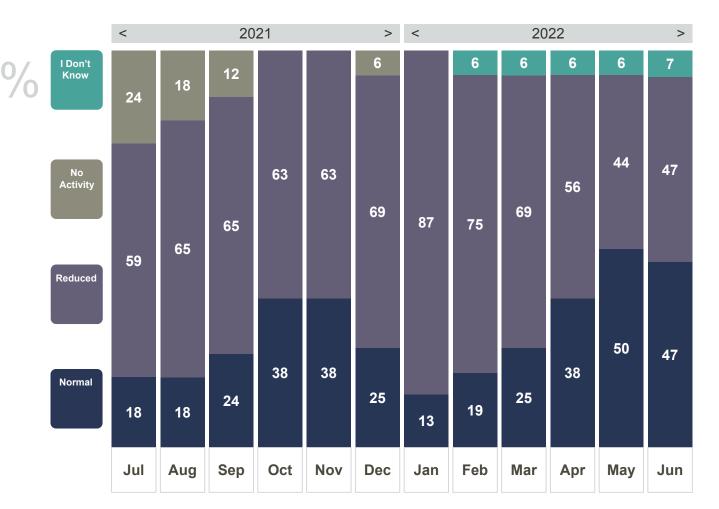
28th UFI Global Exhibition Barometer / February 2022 ©



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	17%	50	25%	8%			
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)		58%		33%	8%		
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		42%		58%			
My company will achieve Net Zero Greenhouse Gas emissions by 2050	9%	36%		5%	9%		
My company will achieve Net Zero Greenhouse Gas emissions before 2050	8%	33%	33%	2	5%		

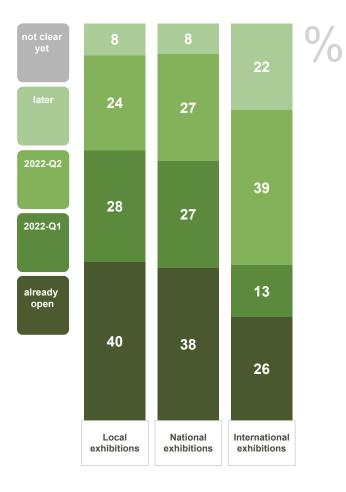
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



The Global Association of the Association of the



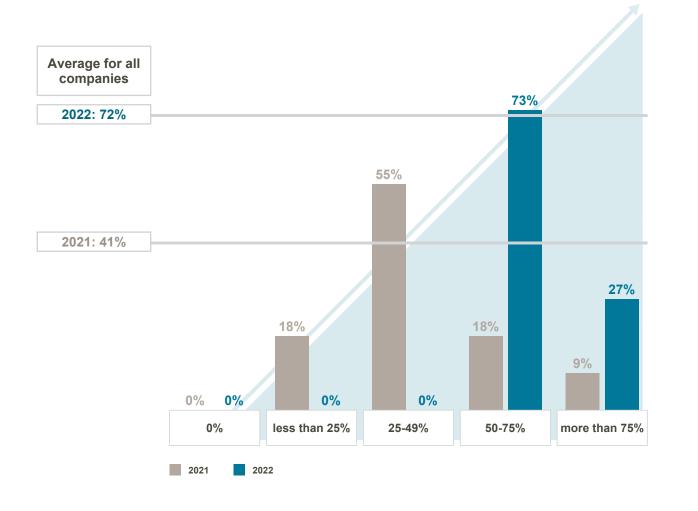
When do you believe exhibitions will open again in your city?



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

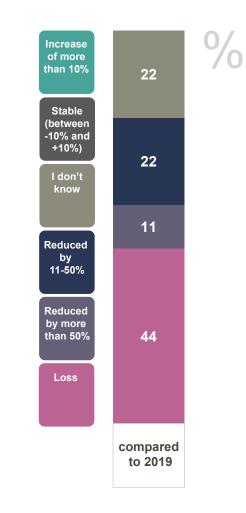
Readiness of exhibiting companies and visitors to participate again	75%
Mid-term visibility in terms of public policies, including travel restrictions	69%
Lift of current travel restrictions	63%
Lift of current public policies that apply locally to exhibitions	56%
Relevant hygiene measures	25%
Financial incentive packages (leading to reduced costs for the exhibitors)	13%
Other	13%

Revenue compared to 2019



**Operating Profits 2021** 

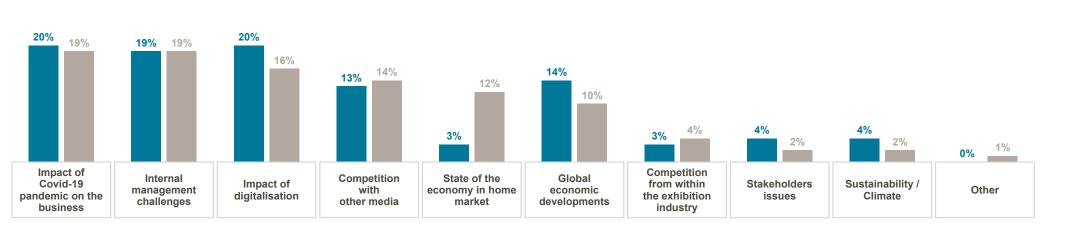
The Global Association of the Exhibition Industry





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

38% 38% 6% Covid-19 confirms the value of face to face events - sector bounces back quickly Less international "physical" exhibitions, and overall less participants 19% 38% 13% 31% 44% 31% A push towards "hybrid" events, more digital elements at events 19% 6% 81% "Virtual" events replacing "physical" events 13%

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93

6%

19%

The Global Association of the Exhibition Industry

Germany Global

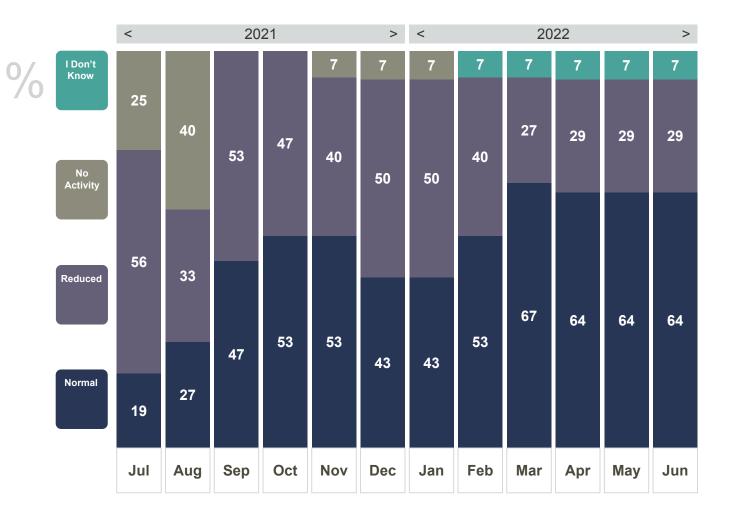


#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	13% 38%			31%	31%			
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	56%				;	31%	6%	6%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		63%				31%		6%
My company will achieve Net Zero Greenhouse Gas emissions by 2050		46%		15%		23%		%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	2	27% 27%		27% 27% 33%		33%		8%

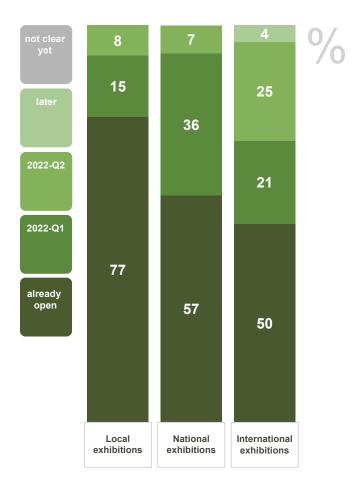


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





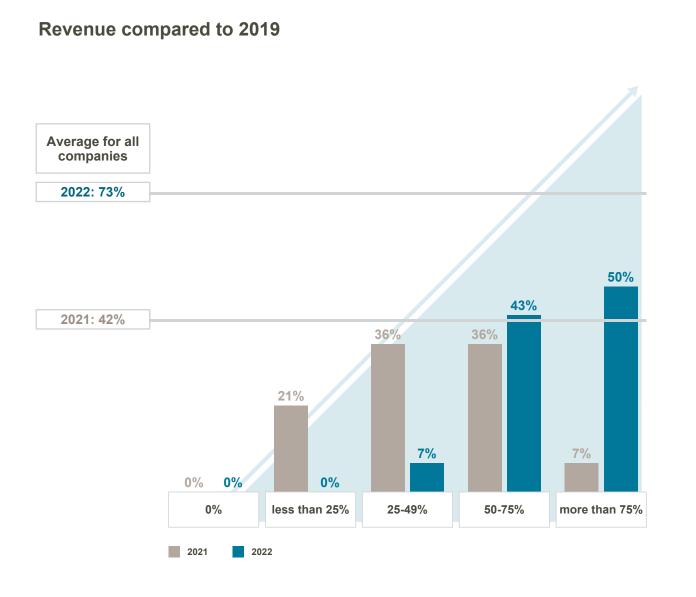
## When do you believe exhibitions will open again in your city?



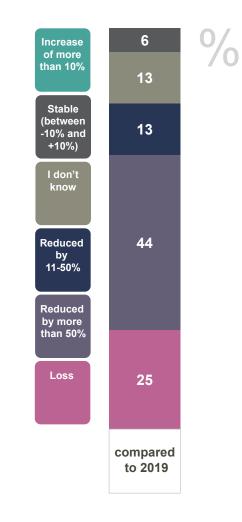
## What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	56%
Mid-term visibility in terms of public policies, including travel restrictions	44%
Readiness of exhibiting companies and visitors to participate again	38%
Lift of current public policies that apply locally to exhibitions	31%
Financial incentive packages (leading to reduced costs for the exhibitors)	31%
Relevant hygiene measures	6%
Other	6%

The Global Association of the Exhibition Industry

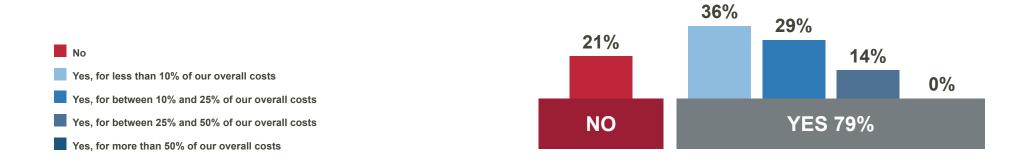


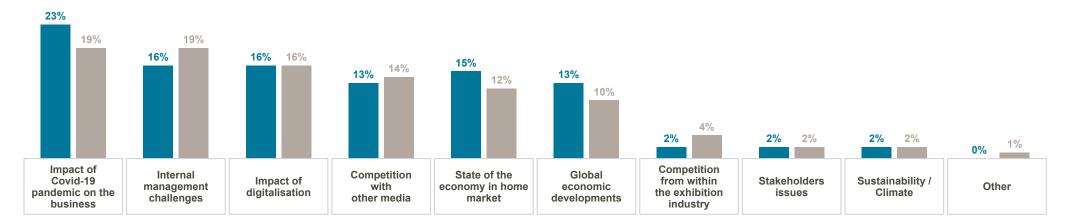
#### **Operating Profits 2021**





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly			60%			33%		7%
Less international "physical" exhibitions, and overall less participants	7%		33%	4	.0%		20%	
A push towards "hybrid" events, more digital elements at events		20%		47%		13%	13%	7%
"Virtual" events replacing "physical" events	7%	20%	20%			53%		

The Global Association of the Exhibition Industry

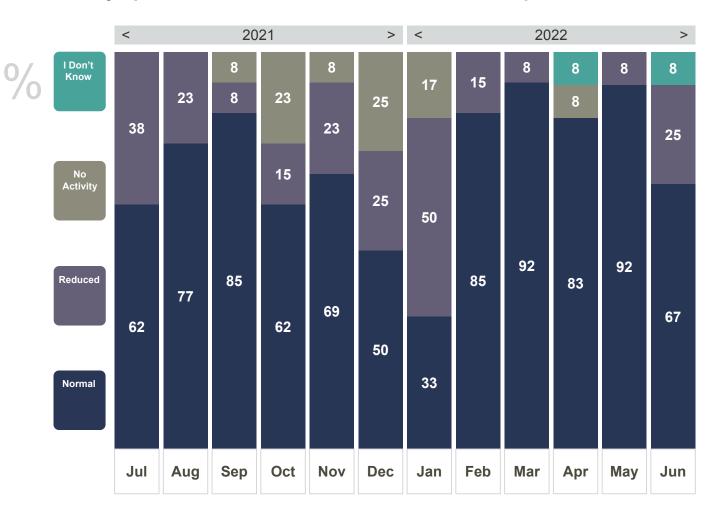
Global

Italy



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	21% 36%		3	36%		
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	29% 50%				21%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	14%		57%		21%	<b>5</b> 7%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	23%	23% 38%		15%	8%	15%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	7% 2	9%	36%	1	7%	21%

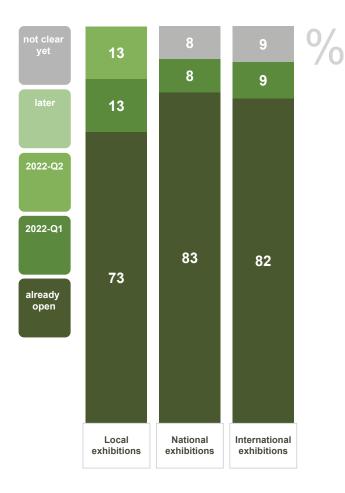


#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

The Global Association of the



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



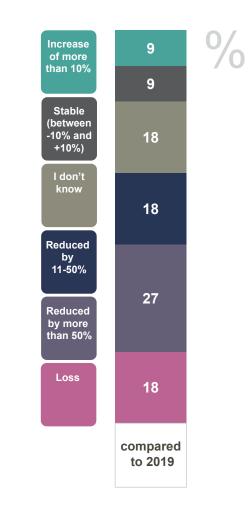
What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	77%
Mid-term visibility in terms of public policies, including travel restrictions	77%
Readiness of exhibiting companies and visitors to participate again	62%
Lift of current public policies that apply locally to exhibitions	54%
Financial incentive packages (leading to reduced costs for the exhibitors)	54%
Relevant hygiene measures	31%
Other	0%



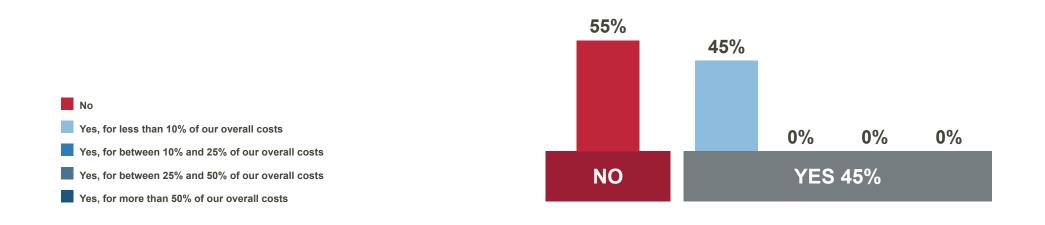
**Revenue compared to 2019** 92% Average for all companies 75% 2022: 72% 2021: 61% 25% 8% 0% 0% 0% 0% 0% 0% 0% less than 25% 25-49% 50-75% more than 75% 2021 2022 

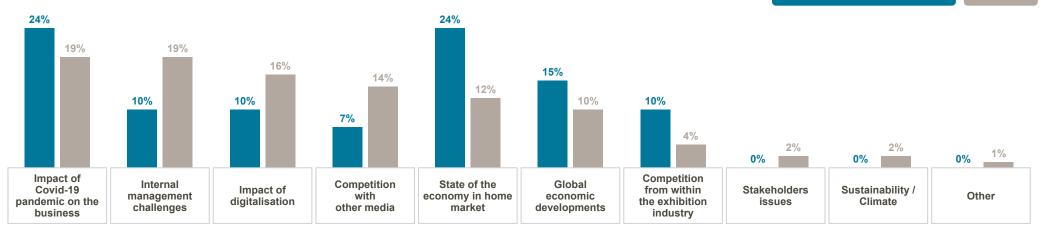
#### **Operating Profits 2021**





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

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

**Russian Federation** 

Covid-19 confirms the value of face to face events - sector bounces back quickly	18'	%		55%		9%	9%	9%
Less international "physical" exhibitions, and overall less participants	55%				9%	36%		
A push towards "hybrid" events, more digital elements at events	27%			55%			18%	
"Virtual" events replacing "physical" events	9% 27%		64%					

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Format of exhibitions in the coming years



Global

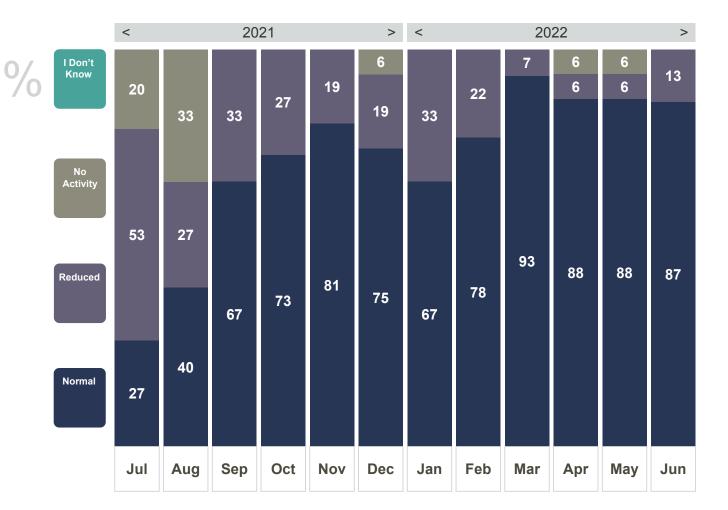


#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	18%	/ 0	9%		55%		9%	9%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	45%				27%		18%	9%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	42%			33%		17%	8%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	27%		3	36%		36%		
My company will achieve Net Zero Greenhouse Gas emissions before 2050	9%	36%		36% 5		55%	/ 0	

## **Detailed results for Spain**

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



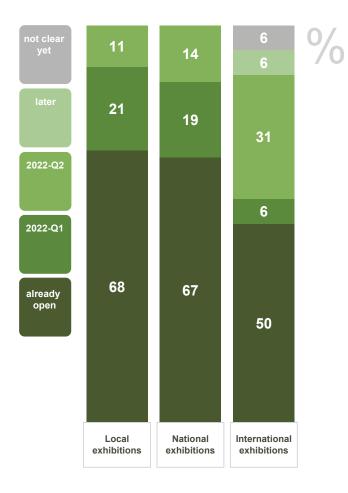
The Global Association of the Association of the

## **Detailed results for Spain**



#### The Global Association of the Exhibition Industry

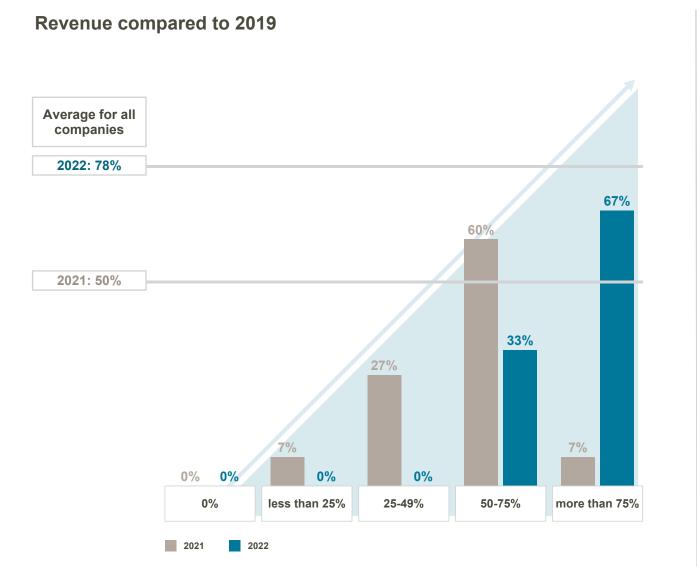
## When do you believe exhibitions will open again in your city?



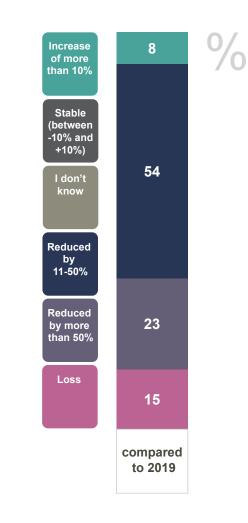
What do you believe would most help the "bounce back" of exhibitions?

Readiness of exhibiting companies and visitors to participate again	60%
Financial incentive packages (leading to reduced costs for the exhibitors)	60%
Lift of current travel restrictions	53%
Mid-term visibility in terms of public policies, including travel restrictions	47%
Lift of current public policies that apply locally to exhibitions	47%
Relevant hygiene measures	7%
Other	0%

The Global Association of the Exhibition Industry

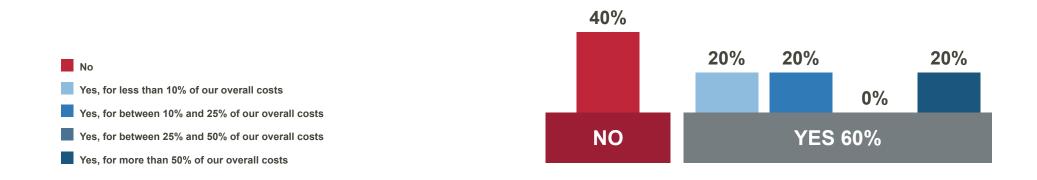


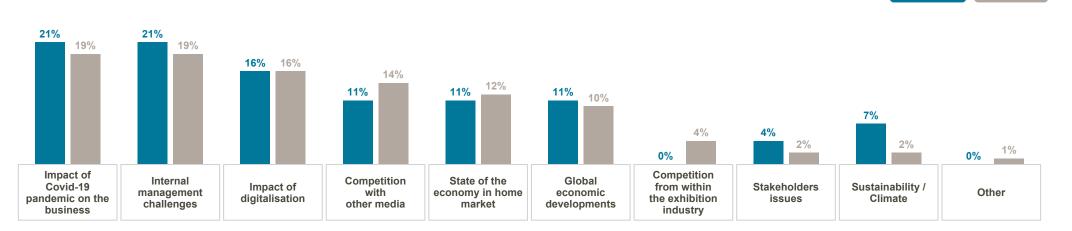
#### **Operating Profits 2021**





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

50% 36% 7% 7% Covid-19 confirms the value of face to face events - sector bounces back quickly Less international "physical" exhibitions, and overall less participants 7% 7% 29% 36% 21% A push towards "hybrid" events, more digital elements at events 14% 57% 21% 7% 14% "Virtual" events replacing "physical" events 43% 43%



Global

Spain

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

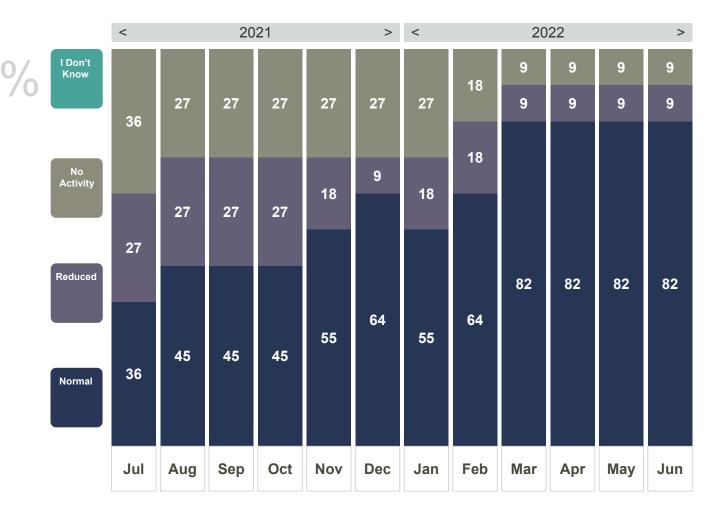


#### **Climate Change and Net Zero Carbon Events**

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

This initiative is of key relevance to secure the future of the industry	36%	43%	21%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)		79%	21%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		79%	21%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	29%	36%	29% 7%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	14%	57%	21% 7%



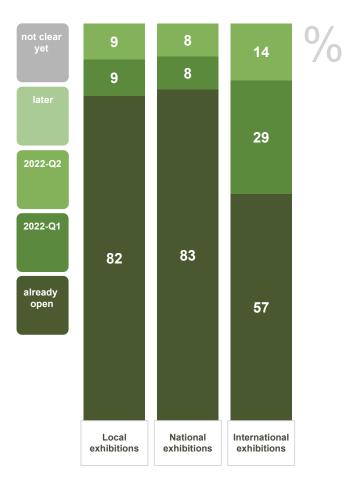


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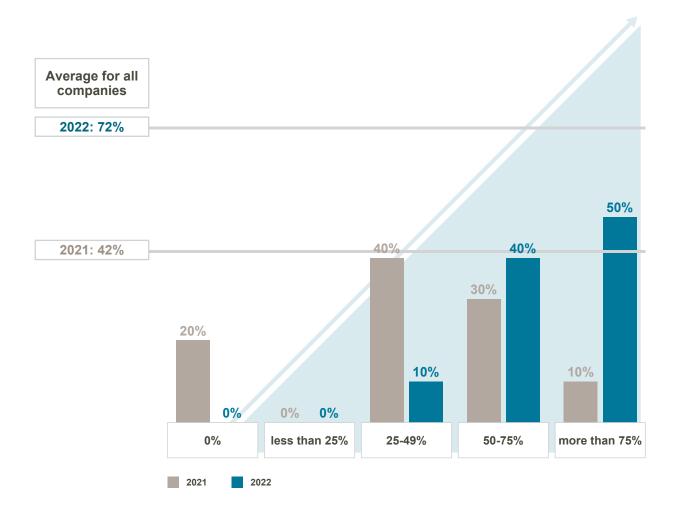
When do you believe exhibitions will open again in your city?



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

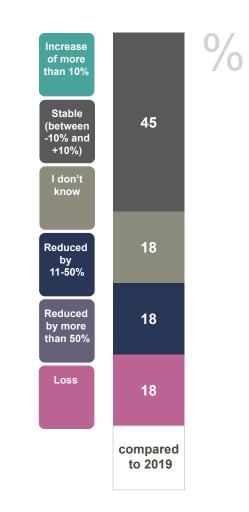
Lift of current travel restrictions	82%	
Lift of current public policies that apply locally to exhibitions	64%	
Mid-term visibility in terms of public policies, including travel restrictions	55%	
Financial incentive packages (leading to reduced costs for the exhibitors)	45%	
Readiness of exhibiting companies and visitors to participate again	36%	
Relevant hygiene measures	27%	
Other	9%	

**Revenue compared to 2019** 



**Operating Profits 2021** 

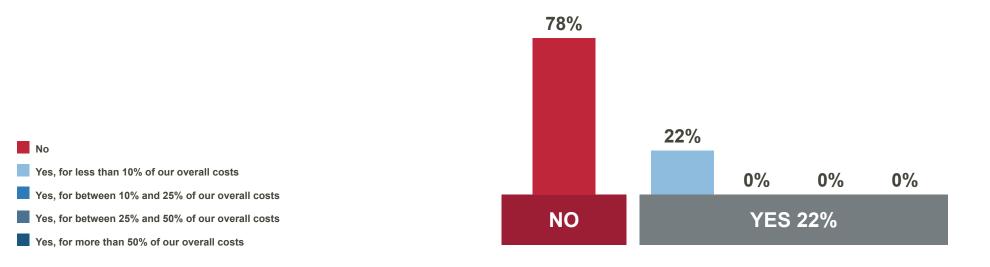
The Global Association of the Association of the

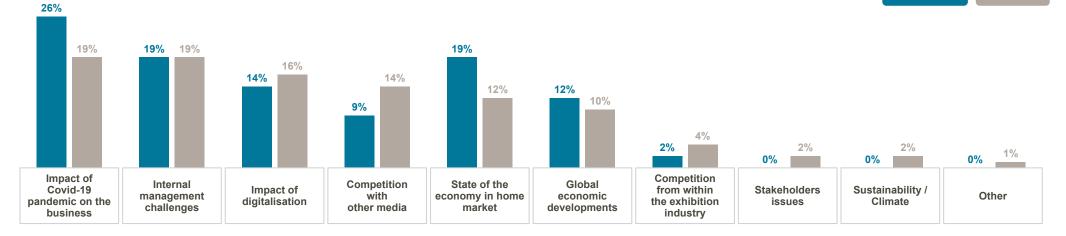




The Global Association of the Exhibition Industry

Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly		73%		27%
Less international "physical" exhibitions, and overall less participants	18%	18%	45%	18%
A push towards "hybrid" events, more digital elements at events	10%	50%	30'	% 10%
"Virtual" events replacing "physical" events	30%	10%	60%	

Turkey Global

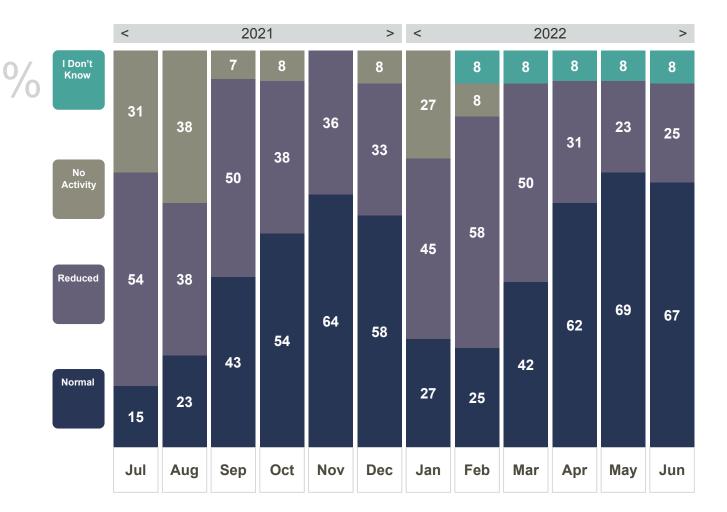


#### **Climate Change and Net Zero Carbon Events**

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

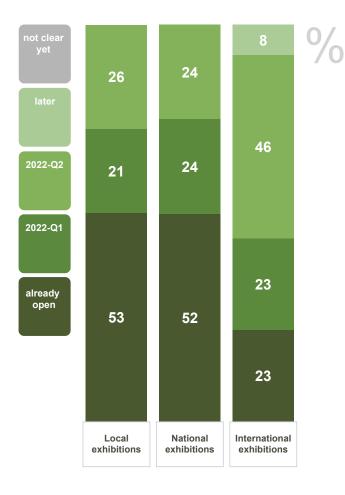
This initiative is of key relevance to secure the future of the industry	22%	22%	11%		44%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	13%		75%			13%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	13%		75%			13%
My company will achieve Net Zero Greenhouse Gas emissions by 2050		57%		14%	14%	14%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	13%	25%	38	%	13%	13%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





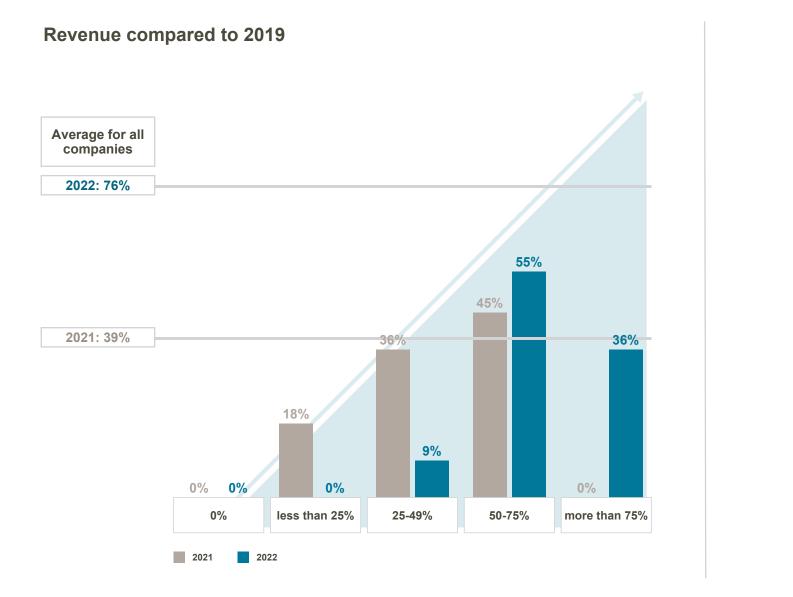
When do you believe exhibitions will open again in your city?



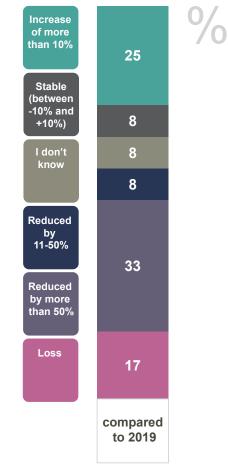
What do you believe would most help the "bounce back" of exhibitions?

Readiness of exhibiting companies and visitors to participate again	77%
Lift of current travel restrictions	54%
Mid-term visibility in terms of public policies, including travel restrictions	54%
Lift of current public policies that apply locally to exhibitions	23%
Financial incentive packages (leading to reduced costs for the exhibitors)	15%
Relevant hygiene measures	15%
Other	15%





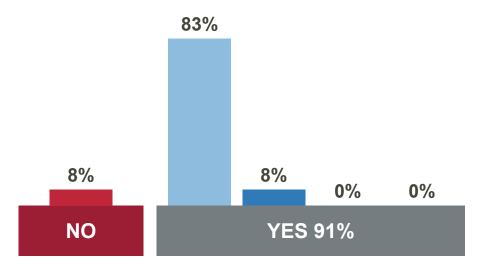
**Operating Profits 2021** 

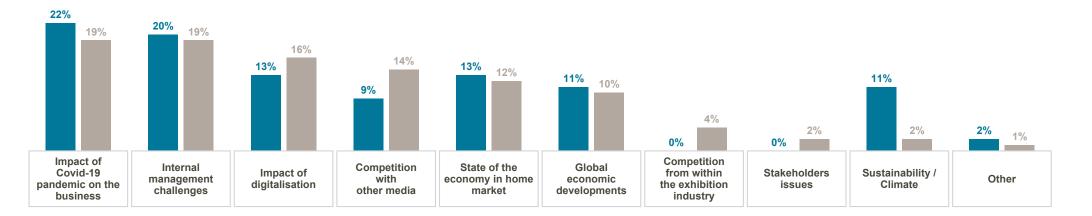




Did your company benefit from public financial support?







#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly		38%		54%		8%
Less international "physical" exhibitions, and overall less participants	8%	46%		23%	8%	15%
A push towards "hybrid" events, more digital elements at events	15%	15%	38%		31	%
"Virtual" events replacing "physical" events	8%		92	.%		

UK Global



#### **Climate Change and Net Zero Carbon Events**

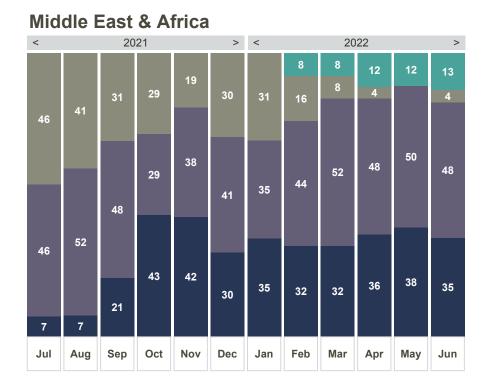
Yes, for sure Most probably Not sure Not sure at all Definitely not

This initiative is of key relevance to secure the future of the industry	54% 3	31%	15%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	85%		15%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	77%		23%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	69%		23% 8%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	62%	23%	8% 8%

# Middle East & Africa

### **Operations - Reopening Exhibitions Middle East & Africa**

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

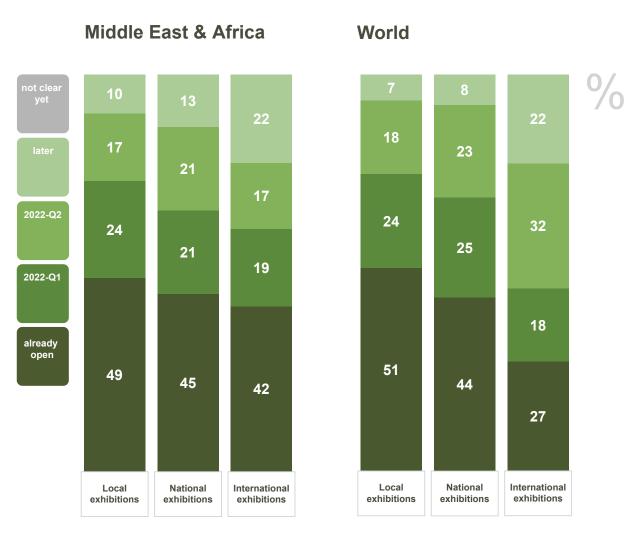




The Global Association of the

# **Operations - Reopening Exhibitions Middle East & Africa**

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



The Global Association of the Exhibition Industry

### **Operations - Reopening Exhibitions Middle East & Africa**

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

#### Middle East & Africa

Lift of current travel restrictions	86%
Financial incentive packages (leading to reduced costs for the exhibitors)	48%
Lift of current public policies that apply locally to exhibitions	45%
Mid-term visibility in terms of public policies, including travel restrictions	41%
Readiness of exhibiting companies and visitors to participate again	28%
Relevant hygiene measures	21%
Other	7%

#### World

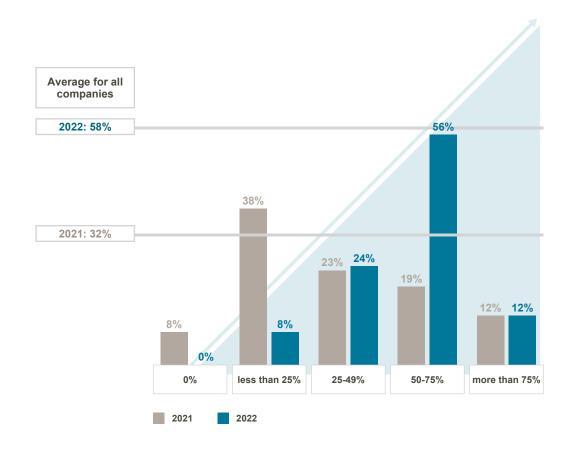
Lift of current travel restrictions	70%
Readiness of exhibiting companies and visitors to participate again	54%
Mid-term visibility in terms of public policies, including travel restrictions	49%
Lift of current public policies that apply locally to exhibitions	47%
Financial incentive packages (leading to reduced costs for the exhibitors)	41%
Relevant hygiene measures	21%
Other	5%

The Global Association of the Explicition Inductor

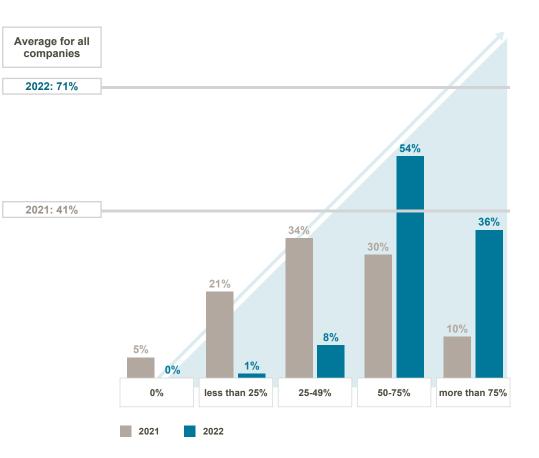
### Turnover Middle East & Africa



#### Middle East & Africa

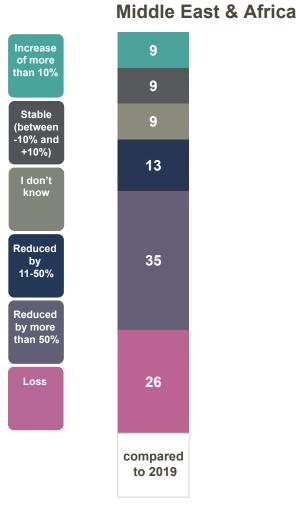


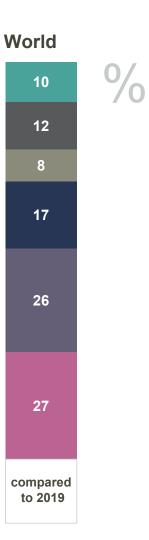
#### World



The Global Association of the Exhibition Industry

### **Operating profit 2019 Middle East & Africa**





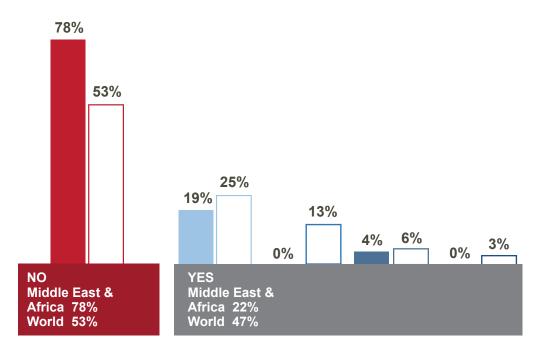
The Global Association of the Exhibition Industry

### Public Financial Support Middle East & Africa



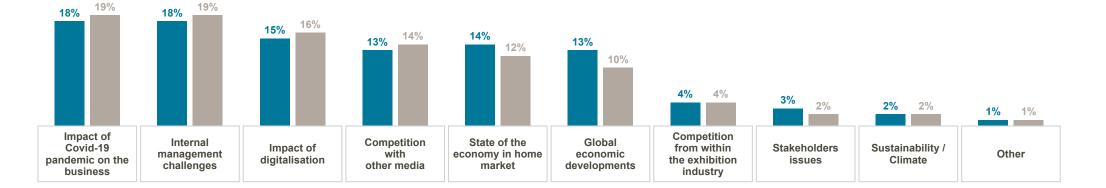
# Did your company benefit from public financial support?

Middle East & AfricaWorldNoYes, for less than 10% of our overall costsYes, for between 10% and 25% of our overall costsYes, for between 25% and 50% of our overall costsYes, for more than 50% of our overall costs



### 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

Covid-19 confirms the value of face to face events - sector bounces back quickly 41%

Less international "physical" exhibitions, and overall less participants	8%		42%	33	3%	13% 4%
A push towards "hybrid" events, more digital elements at events	229	6	4	4%	19%	<mark>4%</mark> 11%
"Virtual" events replacing "physical" events	13%	8%	21%		58%	

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Middle East & Africa

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

Global

Definitely not

11%

7%

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# Climate Change and Net Zero Carbon Events Middle East & Africa



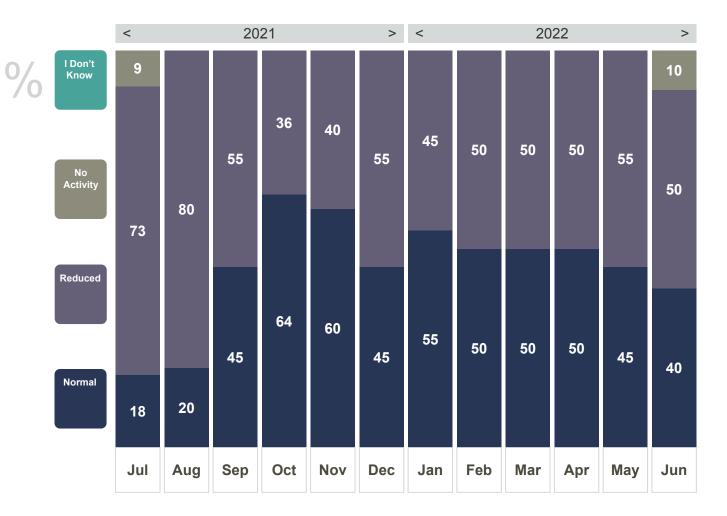
#### **Climate Change and Net Zero Carbon Events**

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

This initiative is of key relevance to secure the future of the industry	38%	38%	21% 4%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	46%	38%	12% 4%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	42%	42%	8% 8%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	43%	30%	17% 9%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	40%	36%	12% 12%

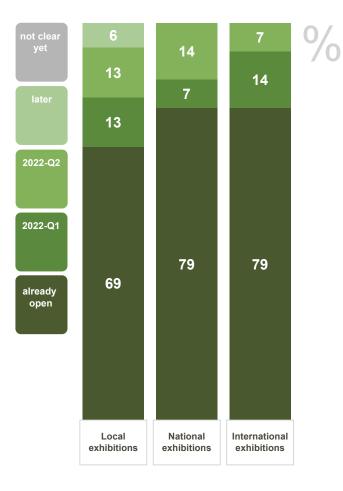
The Global Association of the Exhibition Industry







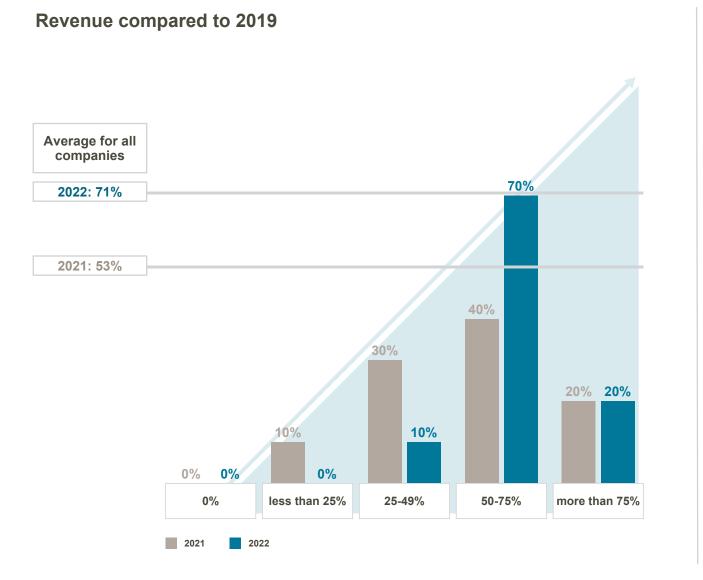
When do you believe exhibitions will open again in your city?



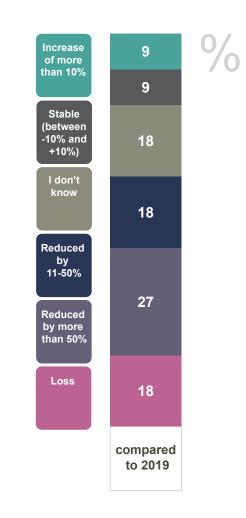
What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	92%
Lift of current public policies that apply locally to exhibitions	42%
Mid-term visibility in terms of public policies, including travel restrictions	33%
Financial incentive packages (leading to reduced costs for the exhibitors)	33%
Readiness of exhibiting companies and visitors to participate again	17%
Relevant hygiene measures	8%
Other	8%



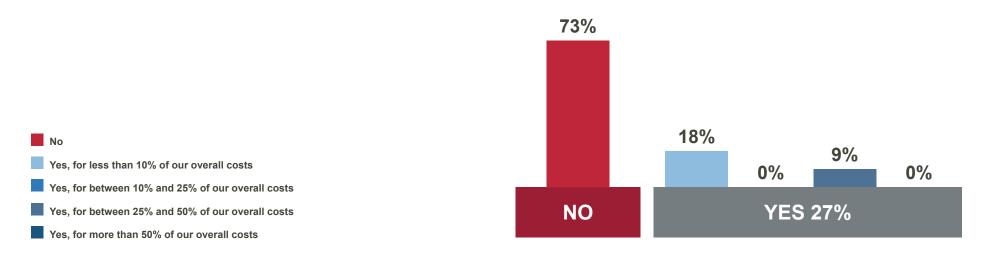


**Operating Profits 2021** 



The Global Association of the Exhibition Industry

Did your company benefit from public financial support?



Most important business issues in the exhibition industry

20% 19% 19% 18% 16% 15% 15% 14% 13% 12% 11% 10% 5% 4% 4% 2% 2% 1% 0% 0% Impact of Competition Competition State of the Global Internal Covid-19 Impact of from within Sustainability / Stakeholders with economy in home Other management economic pandemic on the digitalisation the exhibition Climate issues challenges other media market developments business industry

#### F

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"Virtual" events replacing "physical" events

_				
Format of	exhibitions	in the	coming	years

Covid-19 confirms the value of face to face events - sector bounces back quickly

Less international "physical" exhibitions, and overall less participants

A push towards "hybrid" events, more digital elements at events

(12 answers in total)

8%

10%

8%

**United Arab Emirates** 

25%

33%

10%

70%

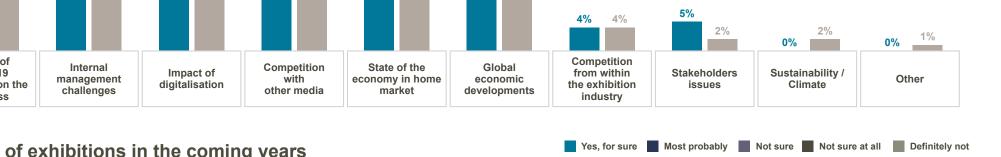
#### Global

17%

8%

20%

17%



10%

50%

10%

33%

20%

50%



Climate Change and Net Zero Carbon Events	Yes, for sure	ost probably 📕 Not sure 📕	Not sure at all Definitely no	
This initiative is of key relevance to secure the future of the industry	45%	27%	27%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	50% 42		% 8%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	55%	3	6% 9%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	40%	30%	30%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	42%	42%	17%	

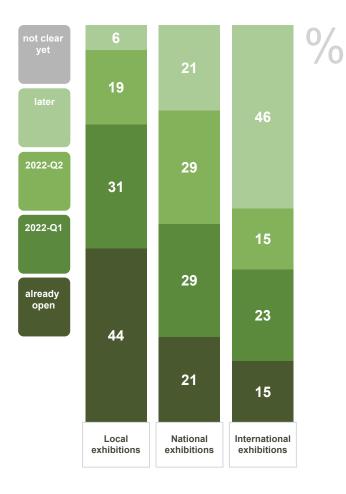
< 2021 > < 2022 > I Don't 0 Know 15 15 /∩ 23 23 25 36 15 50 8 57 57 31 No Activity 64 64 67 54 50 43 Reduced 54 62 29 46 36 36 36 36 33 Normal 25 23 21 21 15 7 7 8 8 Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

The Global Association of the



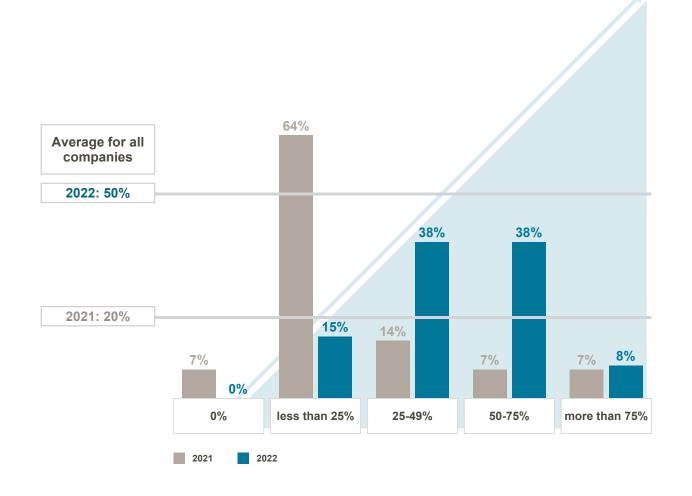
When do you believe exhibitions will open again in your city?



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

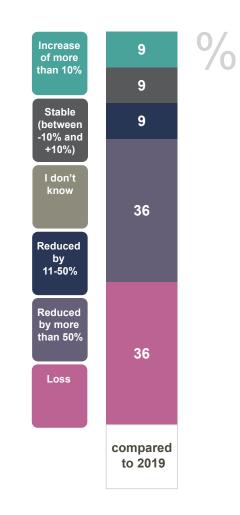
Lift of current travel restrictions	79%	
Financial incentive packages (leading to reduced costs for the exhibitors)	57%	
Lift of current public policies that apply locally to exhibitions	50%	
Mid-term visibility in terms of public policies, including travel restrictions	43%	
Readiness of exhibiting companies and visitors to participate again	36%	
Relevant hygiene measures	29%	
Other	7%	

**Revenue compared to 2019** 

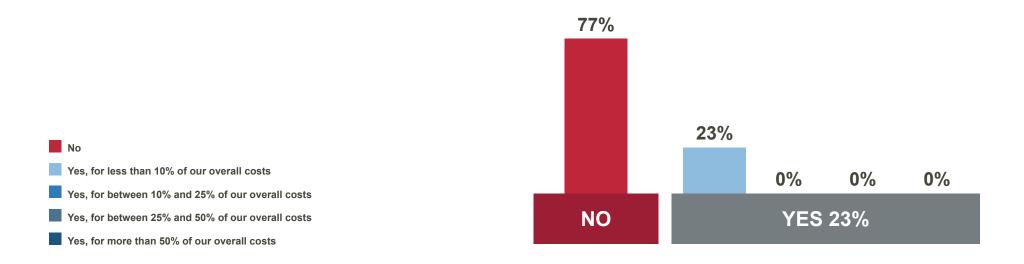


#### **Operating Profits 2021**

The Global Association of the Association of the



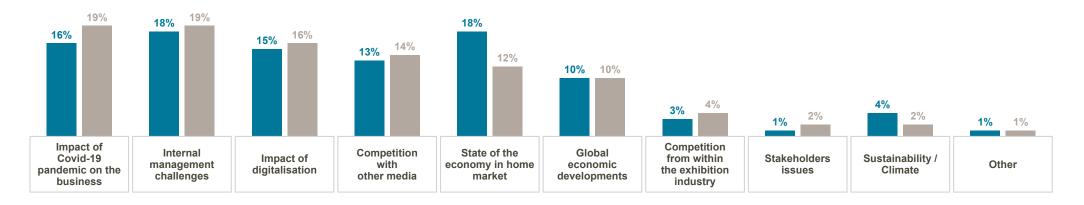
Did your company benefit from public financial support?



The Global Association of the Association of the

#### 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

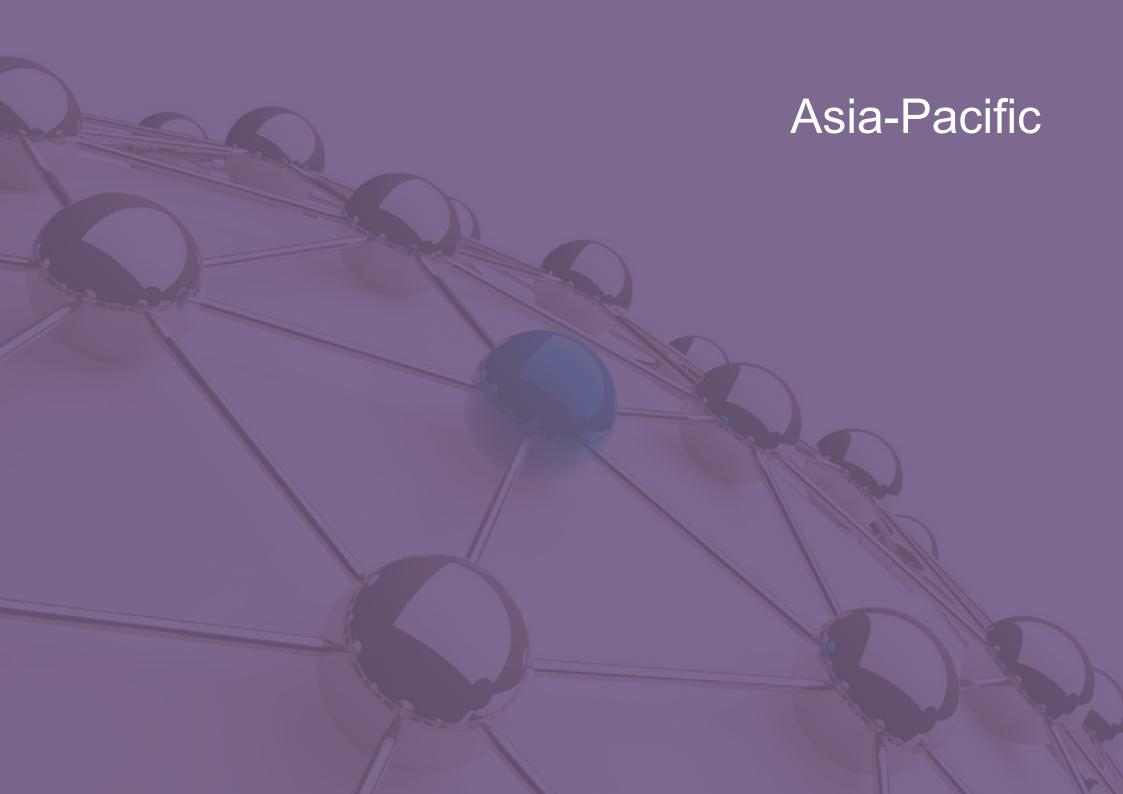
Covid-19 confirms the value of face to face events - sector bounces back quickly	31%		62%			8%
Less international "physical" exhibitions, and overall less participants	8%	42%		42%		8%
A push towards "hybrid" events, more digital elements at events	15%		62%		15%	8%
"Virtual" events replacing "physical" events	8%	17%	33%		42%	

### **Detailed results for South Africa**



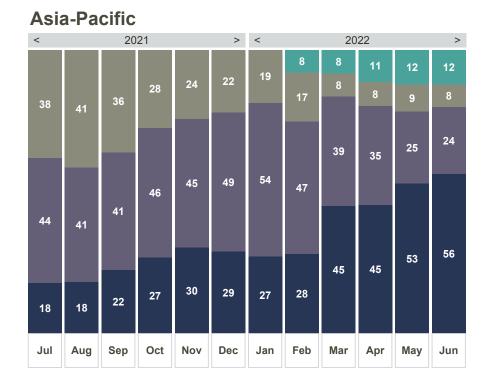
#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	25%	50%	17%	8%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	50%	33%	8%	8%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	36%	45%	9%	9%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	45%	36%	18%	6
My company will achieve Net Zero Greenhouse Gas emissions before 2050	45%	27%	27%	



#### **Operations - Reopening Exhibitions Asia-Pacific**

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

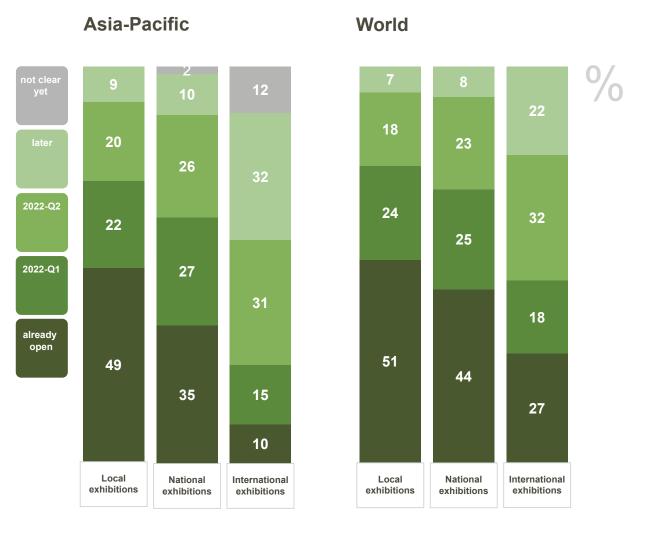




## **Operations - Reopening Exhibitions Asia-Pacific**

The Global Association of the Exhibition Industry

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



## Operations - Reopening Exhibitions Asia-Pacific

#### What do you believe would most help the "bounce back" of exhibitions?

#### **Asia-Pacific**

Lift of current travel restrictions	82%
Mid-term visibility in terms of public policies, including travel restrictions	55%
Lift of current public policies that apply locally to exhibitions	53%
Readiness of exhibiting companies and visitors to participate again	49%
Financial incentive packages (leading to reduced costs for the exhibitors)	38%
Relevant hygiene measures	17%
Other	2%

#### World

Lift of current travel restrictions	70%
Readiness of exhibiting companies and visitors to participate again	54%
Mid-term visibility in terms of public policies, including travel restrictions	49%
Lift of current public policies that apply locally to exhibitions	47%
Financial incentive packages (leading to reduced costs for the exhibitors)	41%
Relevant hygiene measures	21%
Other	5%

The Global Association of the Exhibition Industry

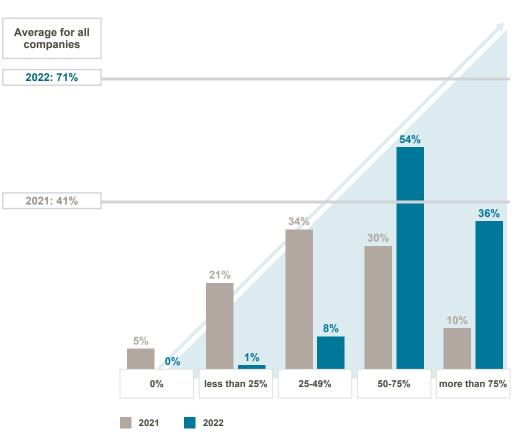
### Turnover Asia-Pacific



#### **Revenue compared to 2019**

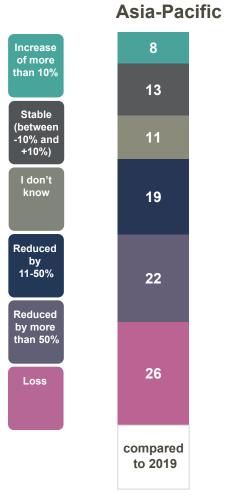


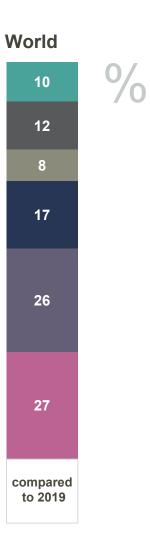
#### World



## Operating profit 2019 Asia-Pacific



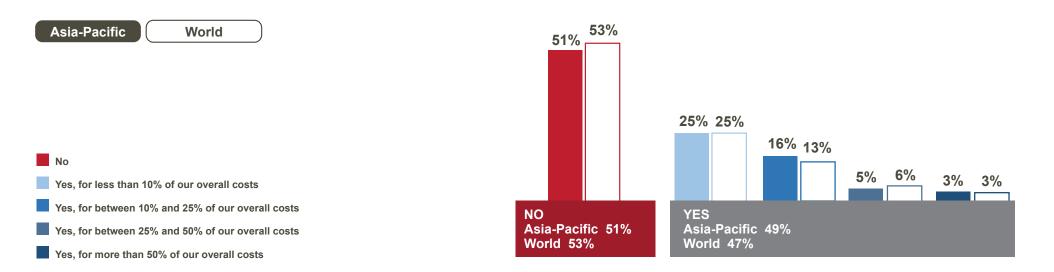




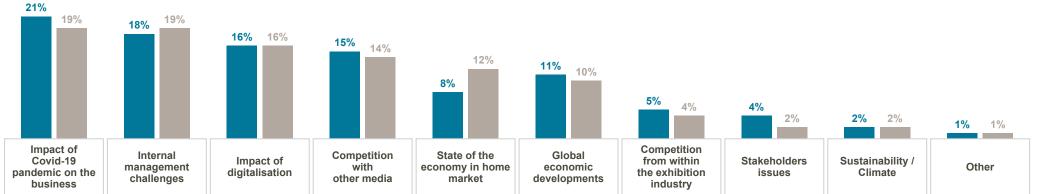
### Public Financial Support Asia-Pacific



# Did your company benefit from public financial support?



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



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

37% 43% 15% 4%1 Covid-19 confirms the value of face to face events - sector bounces back quickly 6% 39% 10% Less international "physical" exhibitions, and overall less participants 31% 14% A push towards "hybrid" events, more digital elements at events 20% 55% 14% 10% 2 13% 56% "Virtual" events replacing "physical" events 15% 15%

Asia-Pacific Global

The Global Association of the Exhibition Industry

### **Climate Change and Net Zero Carbon Events** Asia-Pacific



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

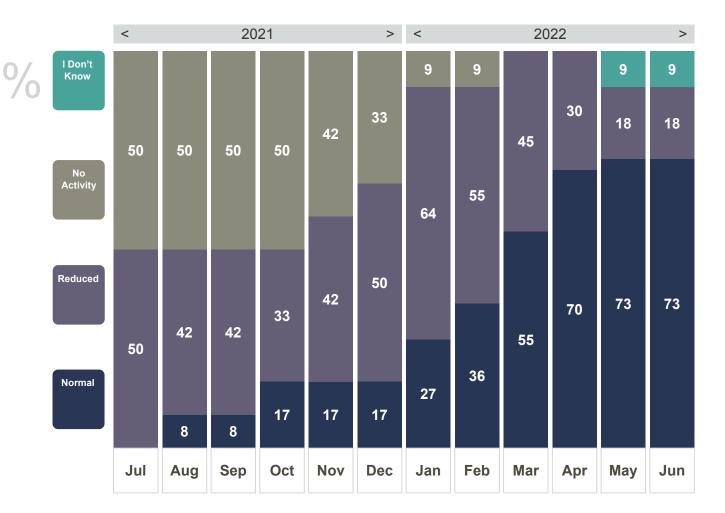
The Global Association of the Exhibition Industry

This initiative is of key relevance to secure the future of the industry	20%		42%	30%	<mark>4%3</mark> %
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	43%		43% 46%		8% 3%1
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	38%		50%		9% 2% <mark>2</mark> 9
My company will achieve Net Zero Greenhouse Gas emissions by 2050	22% 27%		39%		7% 4%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	16%	23%	45%	, o	12% 5%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

\*

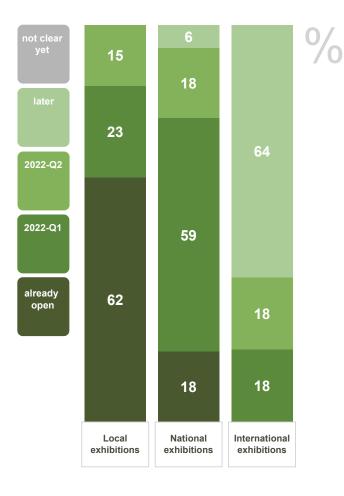
The Global Association of the Association of the





#### The Global Association of the Association Industry

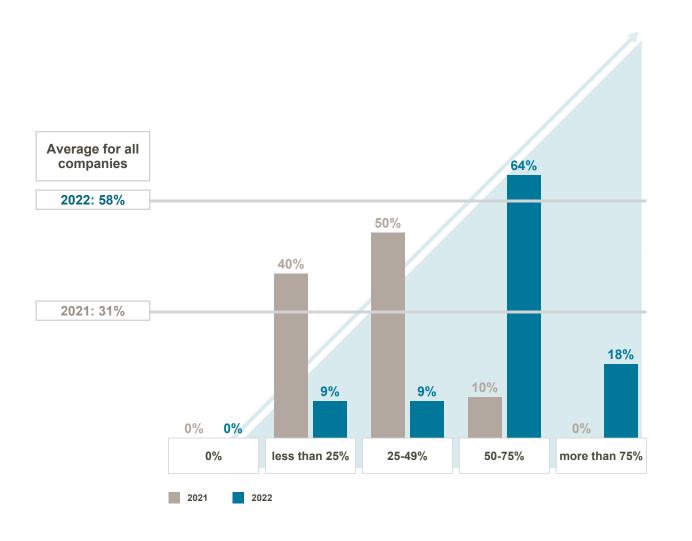
# When do you believe exhibitions will open again in your city?



# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	83%
Readiness of exhibiting companies and visitors to participate again	42%
Mid-term visibility in terms of public policies, including travel restrictions	42%
Lift of current public policies that apply locally to exhibitions	42%
Financial incentive packages (leading to reduced costs for the exhibitors)	17%
Relevant hygiene measures	8%
Other	0%

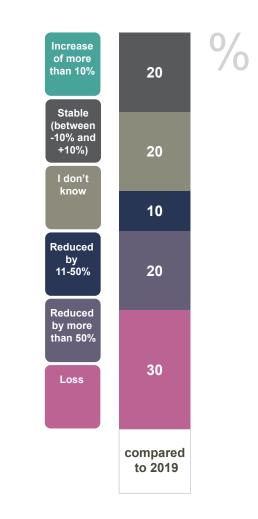
**Revenue compared to 2019** 



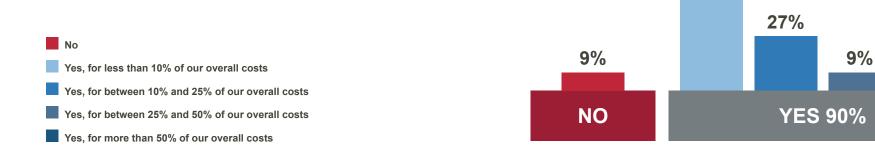
#### **Operating Profits 2021**

The Global Association of the Association of the

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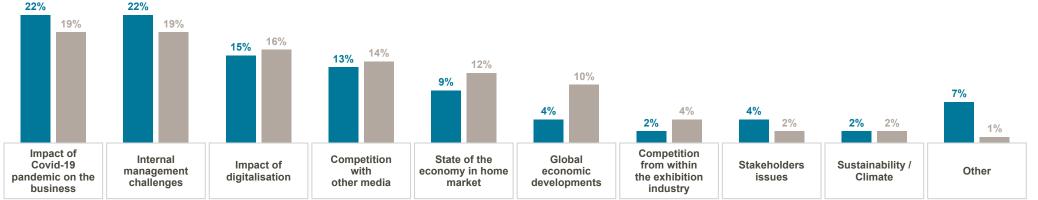
Did your company benefit from public financial support?



45%

The Global Association of the Association of the

**9%** 



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

18% 45% 27% 9% Covid-19 confirms the value of face to face events - sector bounces back quickly 9% 18% 36% Less international "physical" exhibitions, and overall less participants 18% 18% 8% 58% 25% 8% A push towards "hybrid" events, more digital elements at events "Virtual" events replacing "physical" events 17% 33% 8% 42%

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

**Australia** 

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The Global Association of the

Global



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

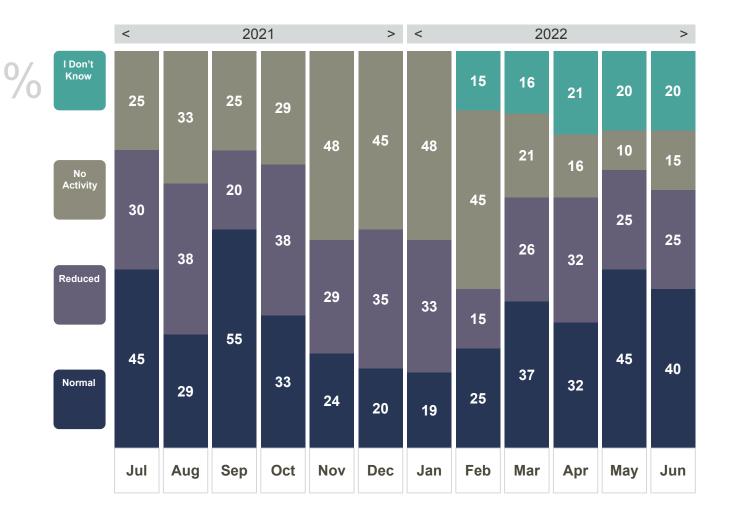
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The Global Association of the Exhibition Industry

This initiative is of key relevance to secure the future of the industry	27%	36%	27% 9%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	5	8%	42%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	50%		50%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	27%	27%	45%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	30%	30%	40%	



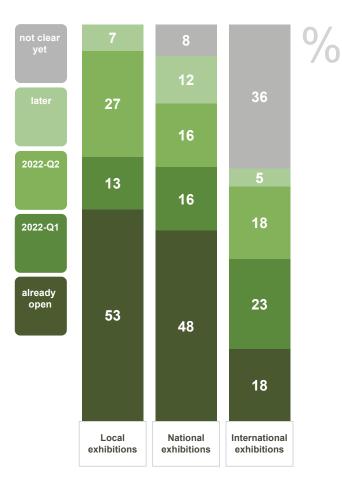
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





#### The Global Association of the Exhibition Industry

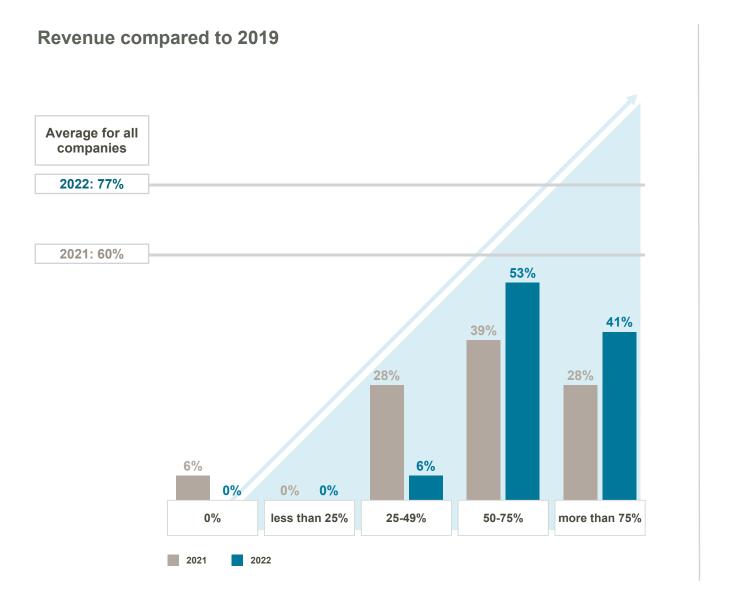
## When do you believe exhibitions will open again in your city?



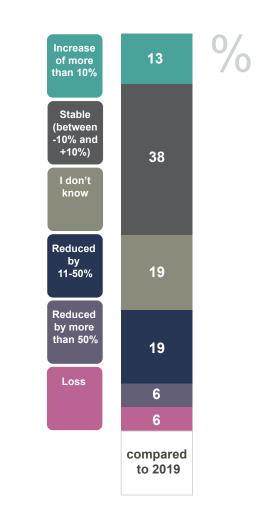
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current public policies that apply locally to exhibitions	76%
Lift of current travel restrictions	71%
Readiness of exhibiting companies and visitors to participate again	52%
Mid-term visibility in terms of public policies, including travel restrictions	52%
Financial incentive packages (leading to reduced costs for the exhibitors)	38%
Relevant hygiene measures	38%
Other	0%





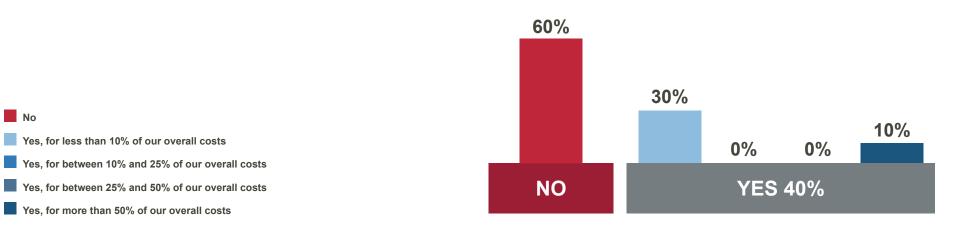
#### **Operating Profits 2021**

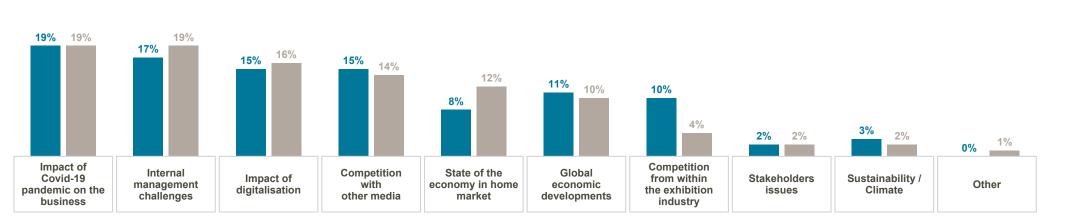






Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

11% 56% 22% 11% Covid-19 confirms the value of face to face events - sector bounces back quickly 28% 56% 11% Less international "physical" exhibitions, and overall less participants 6% A push towards "hybrid" events, more digital elements at events 47% 16% 11% 26% 22% 17% 33% 28% "Virtual" events replacing "physical" events



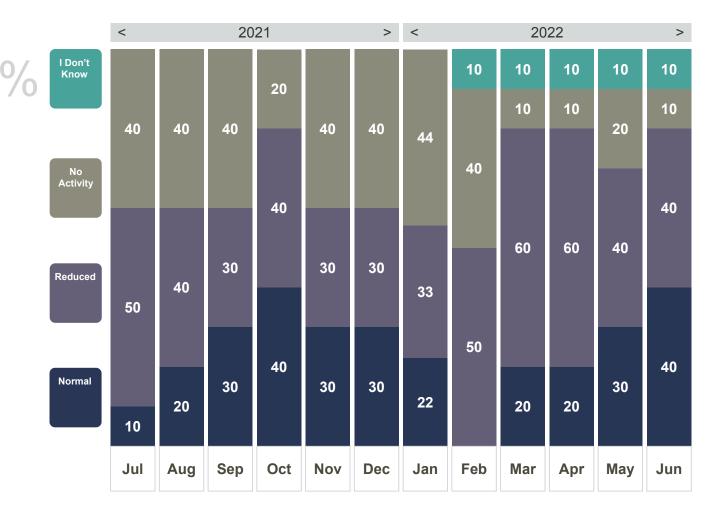
China Global



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	24%		41%	29%	6%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	28%		56%	11%	6%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	12%		65%	18%	6%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	17%	17%	50%	6%	11%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	6% 22	2%	56%	11%	6%



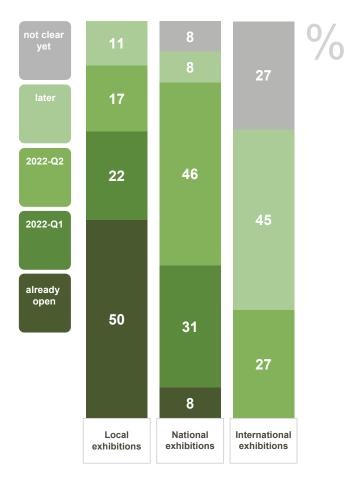


The Global Association of the Association of the



#### The Global Association of the Exhibition Industry

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

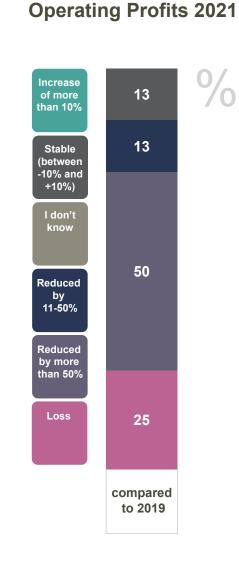


# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	90%
Financial incentive packages (leading to reduced costs for the exhibitors)	60%
Readiness of exhibiting companies and visitors to participate again	40%
Mid-term visibility in terms of public policies, including travel restrictions	40%
Lift of current public policies that apply locally to exhibitions	20%
Relevant hygiene measures	10%
Other	0%

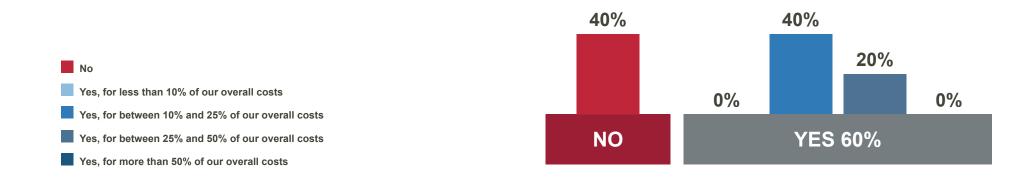
**Revenue compared to 2019** Average for all companies 63% 2022: 58% 2021: 41% 38% 25% 25% 25% 13% 13% 0% 0% 0% 0% 25-49% 50-75% less than 25% more than 75% 2021 2022 

#### The Global Association of the Exhibition Industry



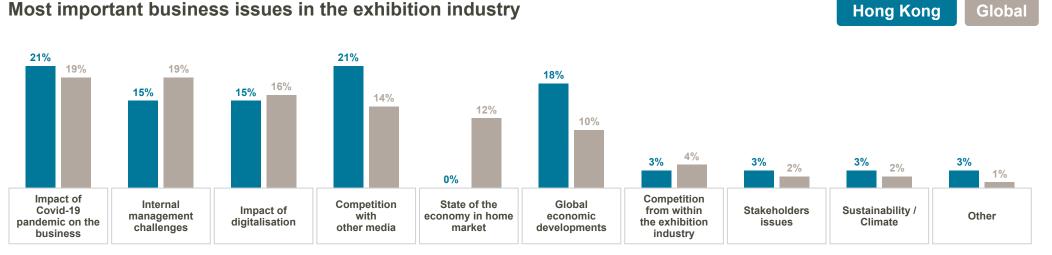


Did your company benefit from public financial support?





Global



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

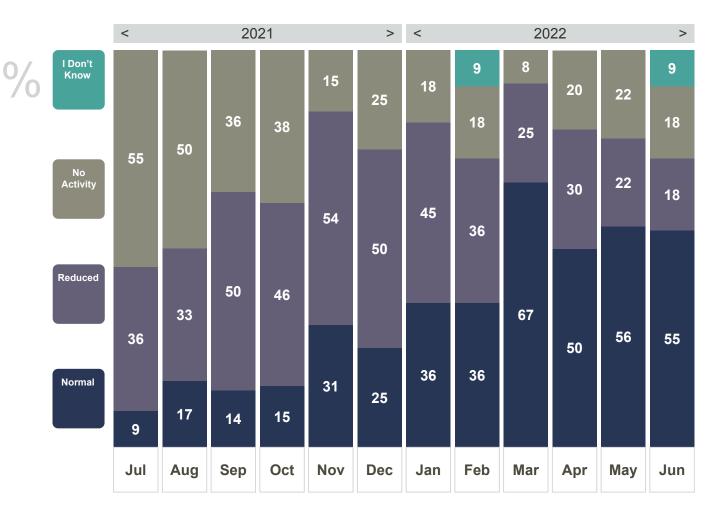
Covid-19 confirms the value of face to face events - sector bounces back quickly	20%		70%		10%
Less international "physical" exhibitions, and overall less participants	20%	50	0%	30%	
A push towards "hybrid" events, more digital elements at events	22%	44	%	22%	11%
"Virtual" events replacing "physical" events	11%	22% 11%		56%	



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	11%		56%	33%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)		33%	44%	11% 11%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	22	2%	56%	11% 11%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	11%	11%	67%	11%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	11%		67%	22%

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

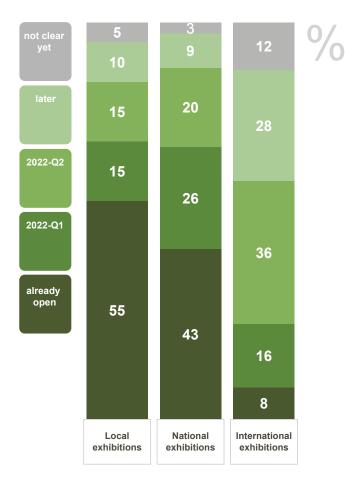


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When do you believe exhibitions will open again in your city?



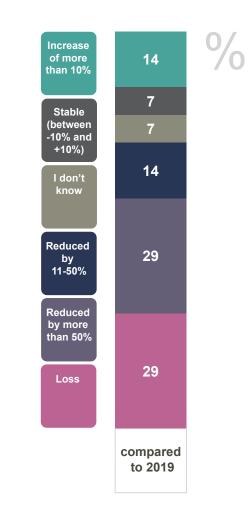
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	88%
Mid-term visibility in terms of public policies, including travel restrictions	50%
Financial incentive packages (leading to reduced costs for the exhibitors)	44%
Lift of current public policies that apply locally to exhibitions	31%
Readiness of exhibiting companies and visitors to participate again	25%
Relevant hygiene measures	13%
Other	13%

**Revenue compared to 2019** Average for all companies 2022: 68% 64% 36% 2021: 36% 21% 21% 14% 14% 14% 14% 0% 0% 0% 25-49% 50-75% more than 75% less than 25% 2021 2022 

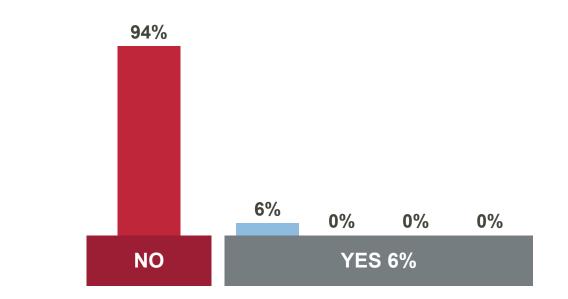
#### **Operating Profits 2021**

The Global Association of the Exhibition Industry





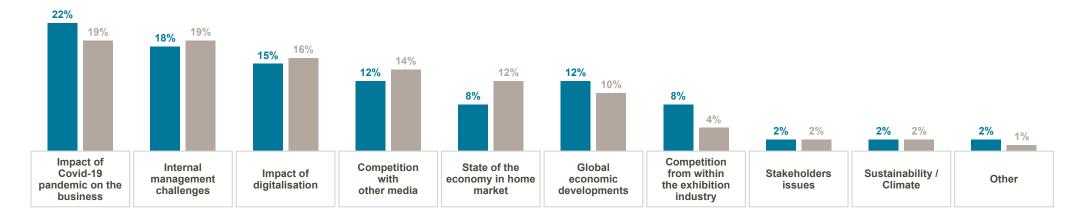
Did your company benefit from public financial support?



#### No

Yes, for less than 10% of our overall costs Yes, for between 10% and 25% of our overall costs

- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

UTI The Global Association of the Evbibilition Industry

India

Global

Covid-19 confirms the value of face to face events - sector bounces back quickly		19%		
Less international "physical" exhibitions, and overall less participants	44%		31%	25%
A push towards "hybrid" events, more digital elements at events	7%	47%	27%	13% 7%
"Virtual" events replacing "physical" events	<b>6%</b> 13%		81%	

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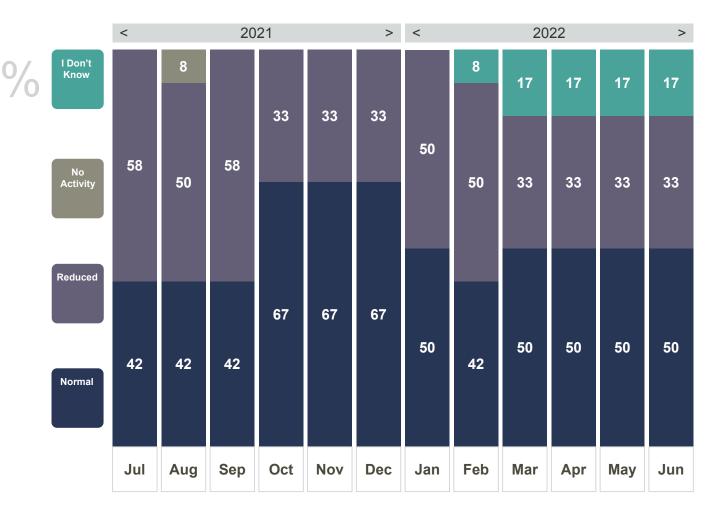
177



This initiative is of key relevance to secure the future of the industry	56%			31%		6% 6%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	38%		4%		13%	6%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	38%		50%			13%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	36%		36%		14% 14%		4%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	7%	36%		43%		14	4%

### **Detailed results for Japan**

Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

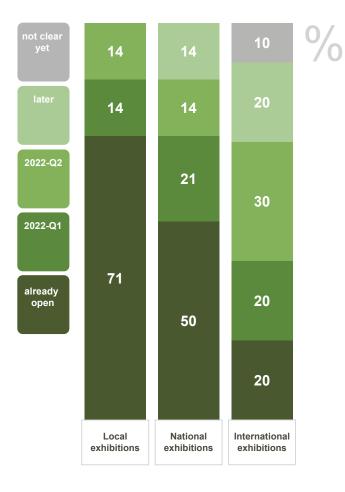


The Global Association of the Association of the

### **Detailed results for Japan**



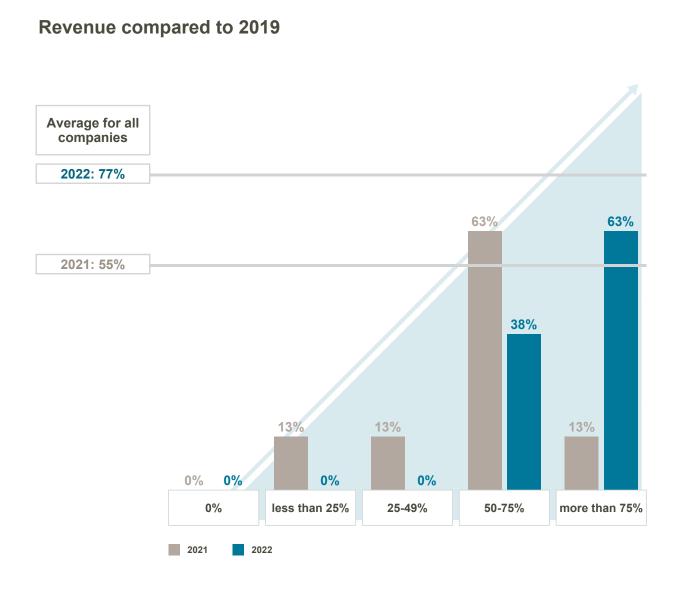
When do you believe exhibitions will open again in your city?



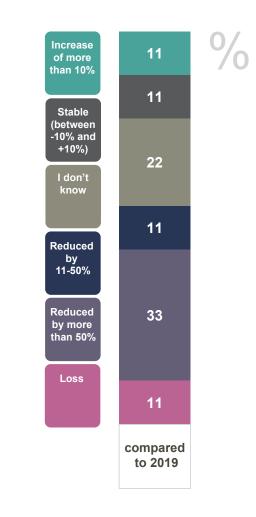
# What do you believe would most help the "bounce back" of exhibitions?

Readiness of exhibiting companies and visitors to participate again	83%	
Lift of current travel restrictions	75%	
Mid-term visibility in terms of public policies, including travel restrictions	67%	
Lift of current public policies that apply locally to exhibitions	50%	
Financial incentive packages (leading to reduced costs for the exhibitors)	25%	
Other	8%	
Relevant hygiene measures	0%	

The Global Association of the Exhibition Industry

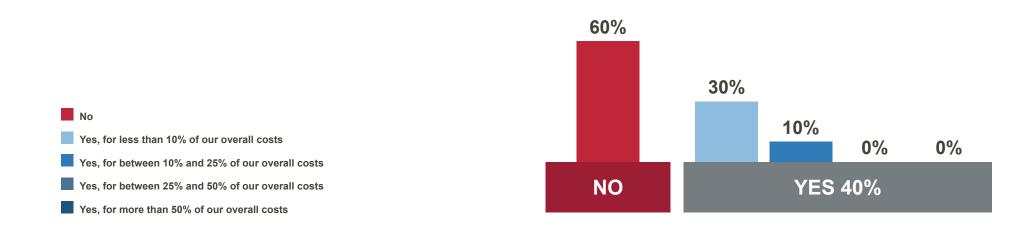


#### **Operating Profits 2021**

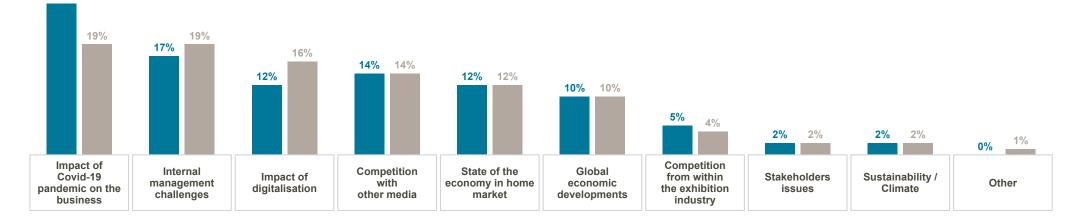




Did your company benefit from public financial support?



26%



#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly	56%			11% 22	2% 11%		
Less international "physical" exhibitions, and overall less participants	44%		33%		44% 33%		22%
A push towards "hybrid" events, more digital elements at events	22%	22% 67			11%		
"Virtual" events replacing "physical" events	11% 11%	22%		56%			

Japan Global

///

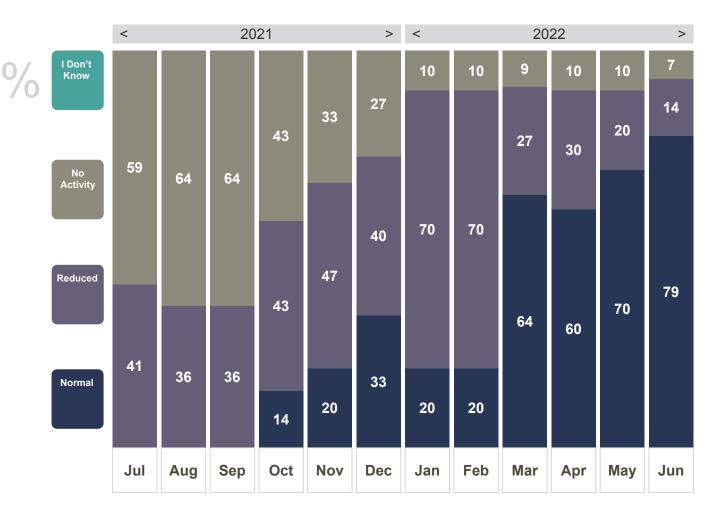


#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	11%	33%	44%		11%	
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	11%		78%		11%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	22%	0	56%		22%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	22%	, 0	56%		22%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	11%	44%	:	22%	22%	

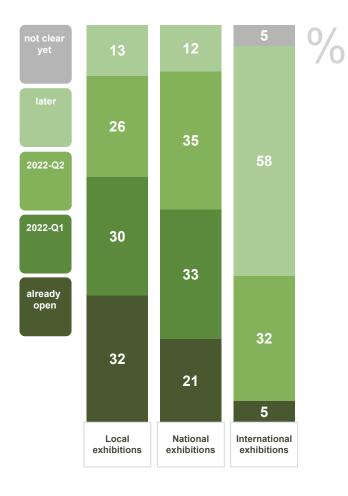


#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





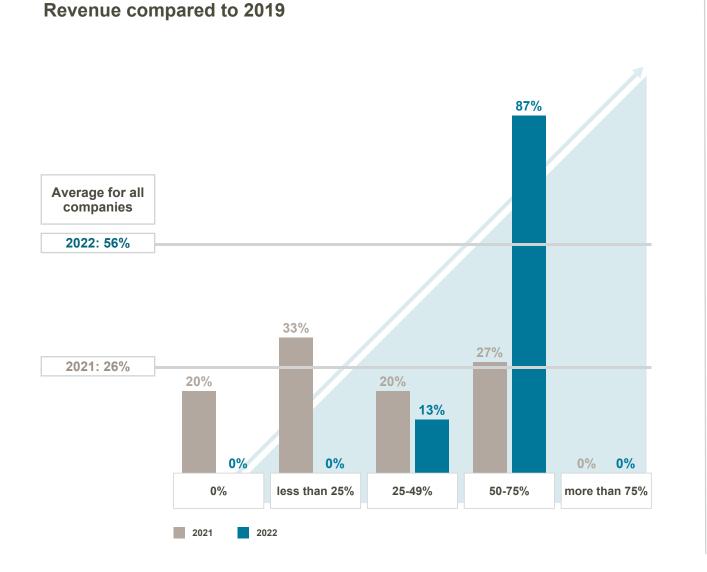
When do you believe exhibitions will open again in your city?



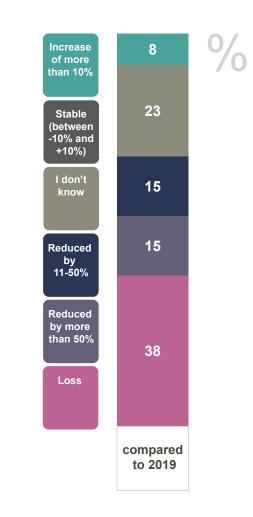
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	87%
Financial incentive packages (leading to reduced costs for the exhibitors)	73%
Mid-term visibility in terms of public policies, including travel restrictions	67%
Readiness of exhibiting companies and visitors to participate again	53%
Lift of current public policies that apply locally to exhibitions	47%
Relevant hygiene measures	20%
Other	0%

The Global Association of the Exhibition Industry

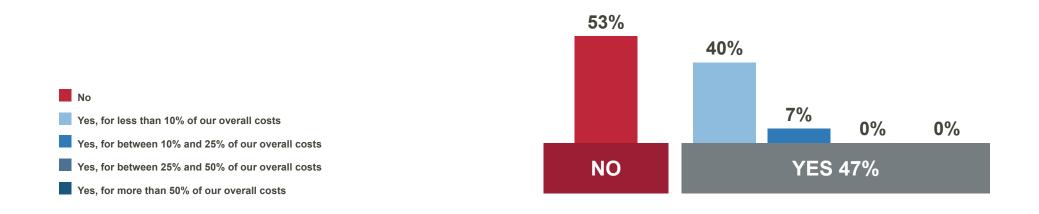


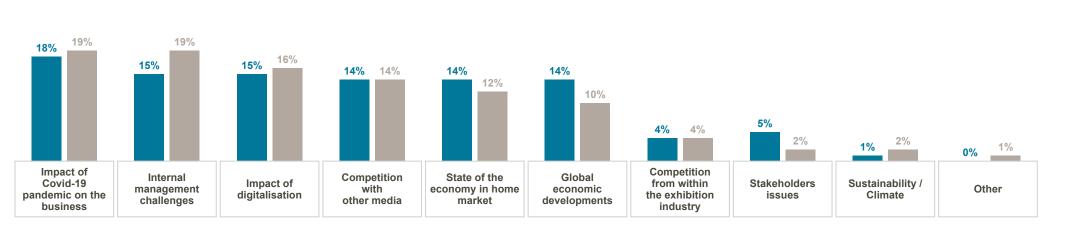
#### **Operating Profits 2021**





Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

50% 36% 14% Covid-19 confirms the value of face to face events - sector bounces back quickly 21% 36% 14% 14% 14% Less international "physical" exhibitions, and overall less participants 14% 79% 7% A push towards "hybrid" events, more digital elements at events 21% 79% "Virtual" events replacing "physical" events

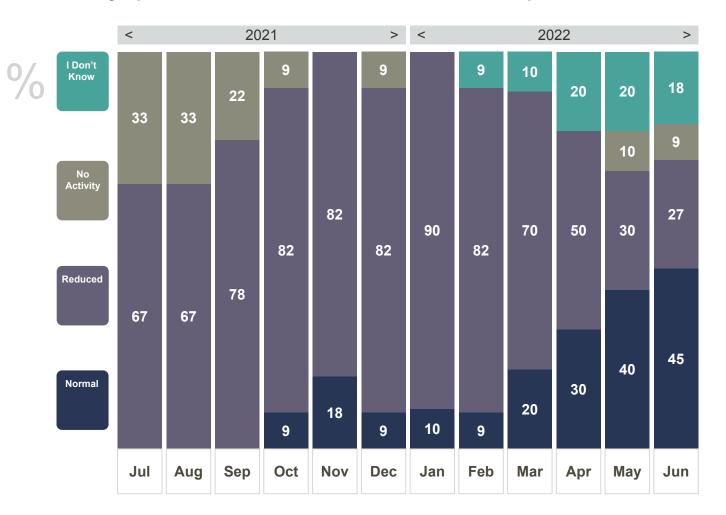






#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	14% 43%		29%	14%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	43%		50%	7%
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events		50%	50%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	21%	29%	36%	14%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	21%	21%	43%	14%



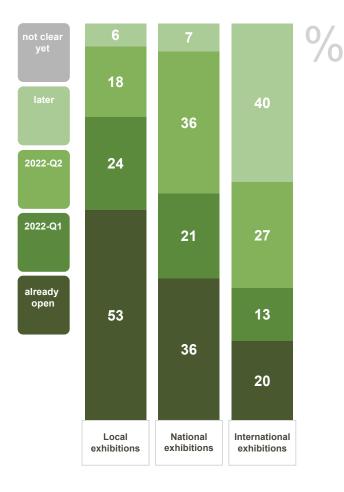
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

The Global Association of the



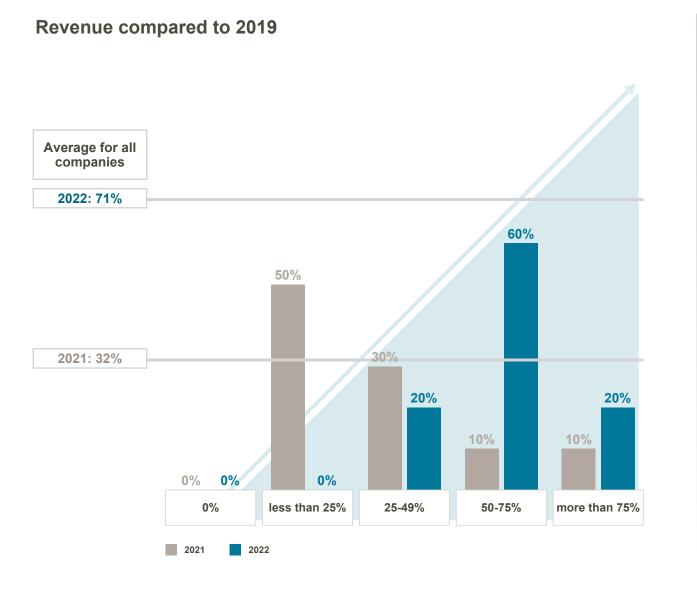
The Global Association of the Exhibition Industry

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



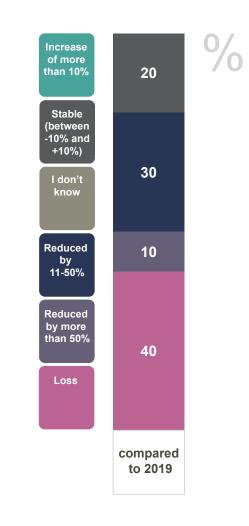
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	91%
Lift of current public policies that apply locally to exhibitions	82%
Mid-term visibility in terms of public policies, including travel restrictions	64%
Readiness of exhibiting companies and visitors to participate again	36%
Financial incentive packages (leading to reduced costs for the exhibitors)	36%
Relevant hygiene measures	0%
Other	0%



**Operating Profits 2021** 

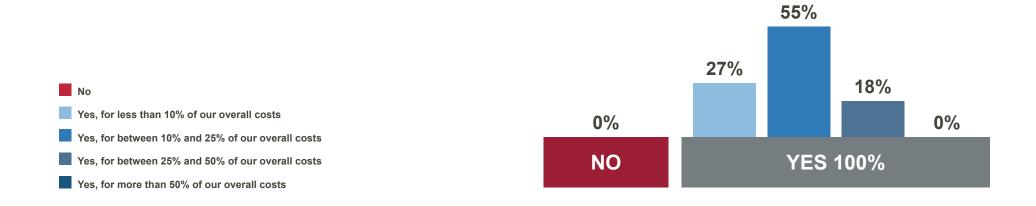
The Global Association of the Industry

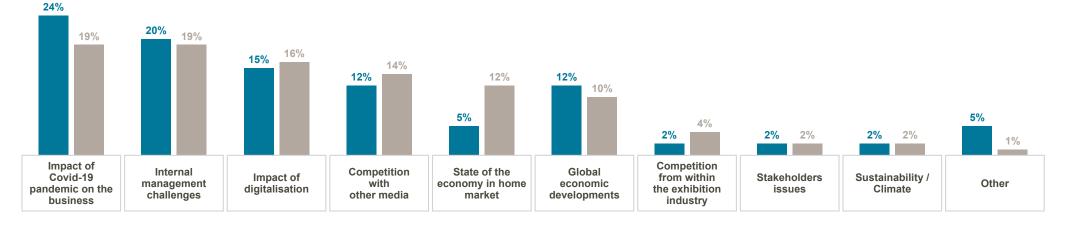


(\*\*\* \* \*

The Global Association of the Exhibition Industry

Did your company benefit from public financial support?





#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

20% 40% 30% 10% Covid-19 confirms the value of face to face events - sector bounces back quickly 40% 30% 30% Less international "physical" exhibitions, and overall less participants A push towards "hybrid" events, more digital elements at events 30% 50% 20% 22% 11% 67% "Virtual" events replacing "physical" events

Singapore Global



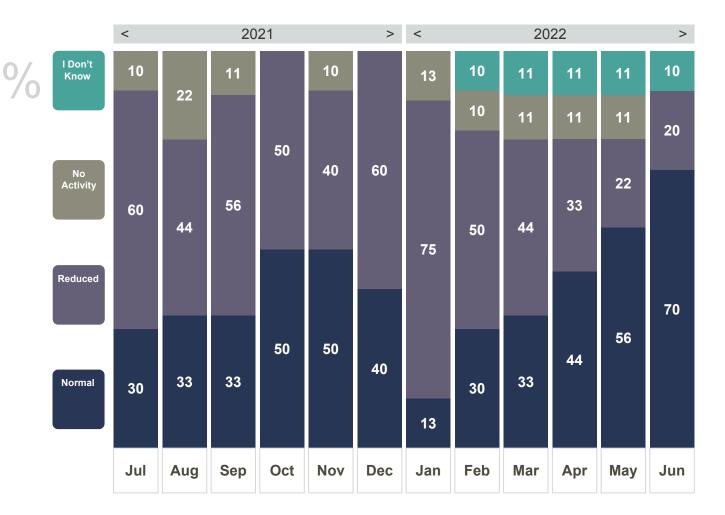
#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	30%	409	10%		
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	6	10%	20%	10%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	50%		30%	10%	10%
My company will achieve Net Zero Greenhouse Gas emissions by 2050	30% 20%		40%		10%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	30% 20%		40%		10%





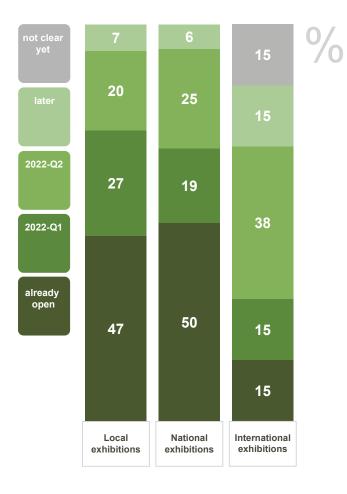
#### Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022





#### The Global Association of the Exhibition Industry

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

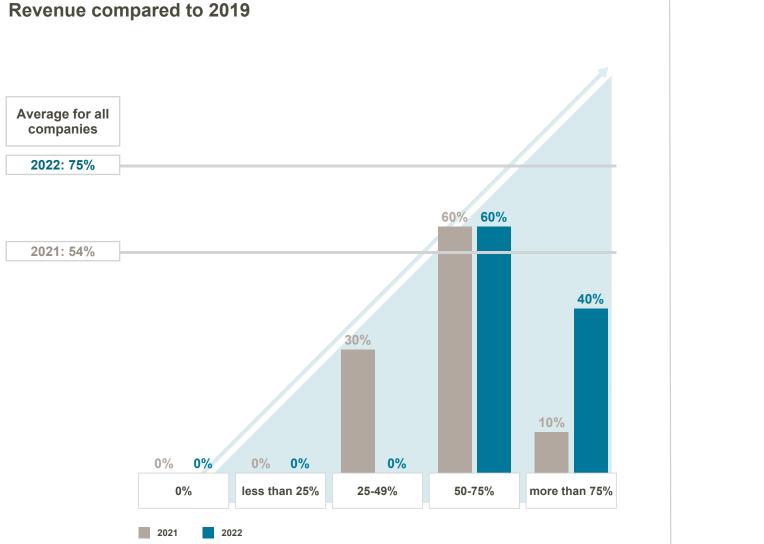


What do you believe would most help the "bounce back" of exhibitions?

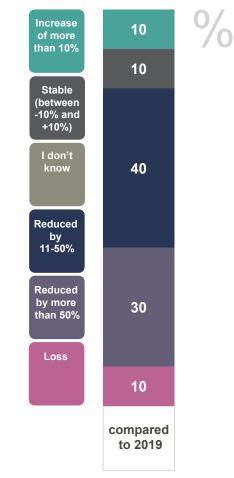
Lift of current travel restrictions	70%
Mid-term visibility in terms of public policies, including travel restrictions	70%
Lift of current public policies that apply locally to exhibitions	60%
Readiness of exhibiting companies and visitors to participate again	50%
Financial incentive packages (leading to reduced costs for the exhibitors)	30%
Relevant hygiene measures	0%
Other	0%







#### **Operating Profits 2021**







Did your company benefit from public financial support?







22% 20% 19% 19% 18% 18% 16% 14% 12% 10% 7% 7% 4% 4% 2% 2% 2% 2% 1% 0% Impact of Competition Internal Competition State of the Global Covid-19 Impact of from within Stakeholders Sustainability / management with economy in home economic Other digitalisation pandemic on the the exhibition Climate issues challenges other media market developments business industry

#### Most important business issues in the exhibition industry

#### Format of exhibitions in the coming years

10% 80% 10% Covid-19 confirms the value of face to face events - sector bounces back quickly 20% Less international "physical" exhibitions, and overall less participants 30% 30% 20% 40% 30% 30% A push towards "hybrid" events, more digital elements at events "Virtual" events replacing "physical" events 10% 10% 50% 30%

South Korea Global

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

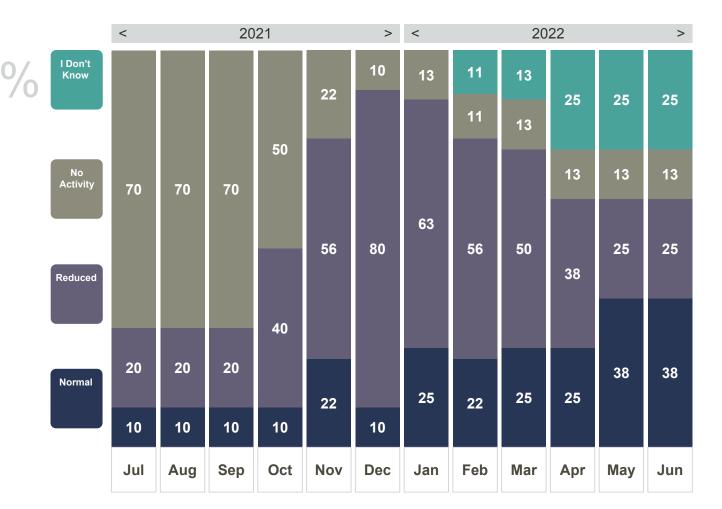
28th UFI Global Exhibition Barometer / February 2022 ©



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	30%	30%	30% 40%		
It is important that the event industry works together to reduce the event) environmental impact of the components it controls (production of the event)	40%		6	60%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	30%		50%	10% 10%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	20%	30%	30%	20%	
My company will achieve Net Zero Greenhouse Gas emissions before 2050	20%	30%	30%	10% 10%	

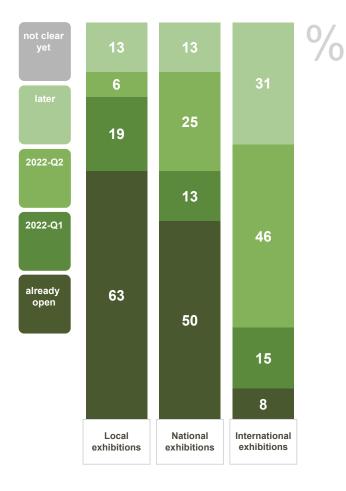
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



The Global Association of the Association of the



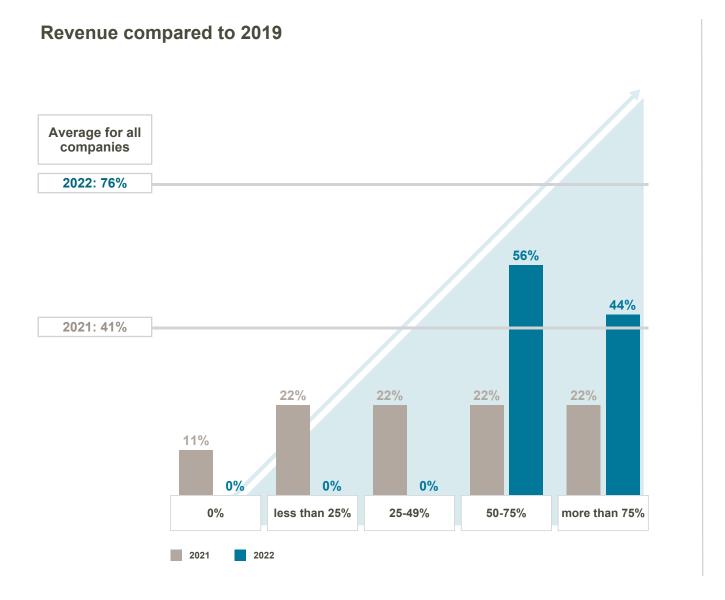
When do you believe exhibitions will open again in your city?



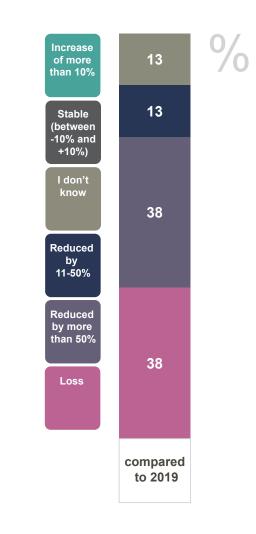
# What do you believe would most help the "bounce back" of exhibitions?

Lift of current travel restrictions	91%	
Lift of current public policies that apply locally to exhibitions	73%	
Mid-term visibility in terms of public policies, including travel restrictions	64%	
Relevant hygiene measures	55%	
Readiness of exhibiting companies and visitors to participate again	45%	
Financial incentive packages (leading to reduced costs for the exhibitors)	27%	
Other	0%	



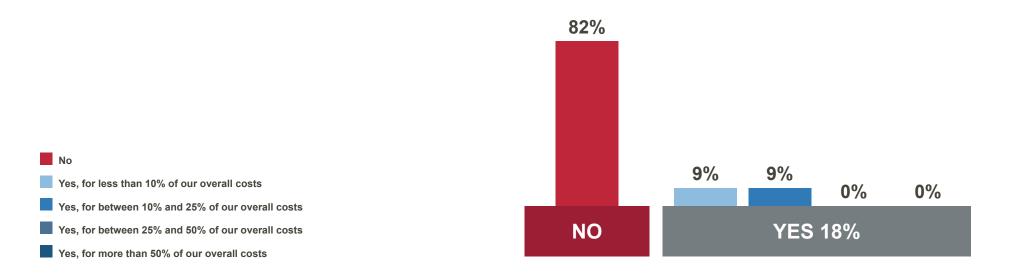


**Operating Profits 2021** 

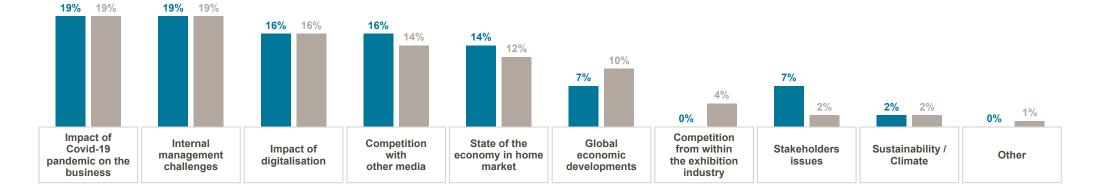




Did your company benefit from public financial support?



#### Most important business issues in the exhibition industry



#### Format of exhibitions in the coming years

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

Covid-19 confirms the value of face to face events - sector bounces back quickly		22%	11%	11%	
Less international "physical" exhibitions, and overall less participants		22%		11%	
A push towards "hybrid" events, more digital elements at events	22%		78%		
"Virtual" events replacing "physical" events	22%	11% 11%	56%		

Thailand Global

The Global Association of the Exhibition Industry



#### **Climate Change and Net Zero Carbon Events**

This initiative is of key relevance to secure the future of the industry	22% 56%			22%
It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)	67%		33%	
It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events	56%		44%	
My company will achieve Net Zero Greenhouse Gas emissions by 2050	22%	22% 44%		33%
My company will achieve Net Zero Greenhouse Gas emissions before 2050	22%	22%	44%	11%

### Conclusion



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. This 28th survey was concluded in January 2022 and includes data from 401 companies in 53 countries and regions. The report delivers outlooks and analysis for 24 focus countries and regions. In addition, it analyses 5 aggregated regional zones.

The results highlight the quickening pace of the industry's recovery in 2022, after the continuing impact of COVID-19 throughout 2021. There is a strong belief that the sector, primarily driven by physical exhibitions and business events, will bounce back quickly.

The results vary depending on location, and are primarily driven by confirmed or expected "reopening dates" for exhibitions.

When asked what **elements would most help towards the "bounce-back" of exhibitions**, seven in ten companies selected "Lifting of current travel restrictions", while five in ten selected "Readiness of exhibiting companies and visitors to participate again", "Mid-term visibility in terms of public policies, including travel restrictions" and "Lift of current public policies that apply locally to exhibitions".

Globally, and on average, companies saw a **2021 turnover** of just 41% of 2019 levels, and project that this will increase to 71%, of the same baseline, in 2022.

In terms of **operating profit for 2021**, 27% of companies globally reported a loss, and 26% reported a reduction of more than 50%, compared to 2019 levels. All regions include countries with a higher than average proportion of companies declaring a loss in 2021.

Overall, 53% of companies received no **public financial support**, and for the majority of those who did, financial public aid represented less than 10% of their overall costs.

In line with results from the previous edition of the Barometer, released in the summer of 2021, "Impact of the COVID-19 pandemic on the business" remains the **most pressing business issue** – although this has dropped to 19% of respondents, from 29%, six months ago. There has also been a shift in the second and third most pressing issues, with "Internal management challenges" (19% of respondents, compared to 9%, six months ago) and "Impact of digitalisation" (16%, compared to 10%, six months ago) forming the top three. "Competition with other media" is now the fourth most pressing issue (14%, compared to 5%, six months ago) while "State of the economy in home market" drops to fifth spot (12%), from being the second most pressing issue just six months ago (19% of respondents).

### Conclusion



The three components of "Internal management challenges" are all almost equally represented within the responses: "Human resources" (56% of respondents), "Business model adjustments" (54%) and "Finance" (48%).

In relation to **future exhibition formats**, the global results indicate that:

- 80% of respondents (up from 78%, six months ago, and 64%, 12 months ago) agree that "COVID-19 confirms the value of face-to-face events", and anticipate the sector to bounce back quickly (with 38% stating "Yes, for sure" and 42% stating "Most probably"). Meanwhile, 13% of respondents are unsure.
- 44% (compared to 46%, six months ago, and 63%, 12 months ago) believe there will be "Less international 'physical' exhibitions, and, overall, less participants" (with 6% stating "Yes, for sure" and 38% stating "Most probably"), while 30% are unsure.
- 73% (compared to 76%, six months ago, and 80%, 12 months ago) believe there is "A push towards hybrid events, more digital elements at events" (with 24% stating "Yes, for sure" and 49% stating "Most probably"), while 15% are unsure.
- 10% (compared to 11%, six months ago, and 14%, 12 months ago) agree that "Virtual events are replacing physical events" (with 2% stating "Yes, for sure" and 9% stating "Most probably"), while 18% are unsure and 54% state "Definitely not".

In the context of the recently launched "**Net Zero Carbon Events initiative**", the global results indicate that:

- 66% of respondents are confident that "This initiative is of key relevance to secure the future of the industry", just weeks after it was launched
- 91% of companies agree that "It is important that the event industry works together to reduce the environmental impact of the components it controls (production of the event)"
- 89% of companies believe that "It is important that the event industry works with its clients (participants) and other stakeholders (destinations, transport and accommodation) to reduce the environmental impact of the other components attributed to events".

Regarding the deadline for companies to achieve Net Zero Greenhouse Gas emissions:

- 23% of respondents are sure "My company will achieve Net Zero Greenhouse Gas emissions before 2050", while 31% believe this is "Most probably" the case and 33% are unsure.
- 69% of respondents are confident that "My company will achieve Net Zero Greenhouse Gas emissions by 2050" (with 41% stating "Yes, for sure" and 28% stating "Most probably"), while 24% are unsure.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION! THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2022 – PLEASE PARTICIPATE!

## Appendix: Number of survey replies per country Total = 401 (in 53 countries/regions)



North America	26	Europe	124	Middle East & Africa	29
Mexico	14	Belgium	3	Qatar	1
USA	12	Croatia	1	Saudi Arabia	2
		Finland	2	South Africa	14
<b>Central &amp; South America</b>	96	France	12	United Arab Emirates	12
Argentina	13	Georgia	1		
Bolivia	4	Germany	16	Asia-Pacific	126
Brazil	31	Greece	3	Australia	12
Chile	11	Hungary	2	China	21
Colombia	18	Italy	16	Hong Kong	10
Costa Rica	2	Kazakhstan	1	India	16
Cuba	1	The Netherlands	1	Indonesia	4
Ecuador	5	Poland	2	Japan	12
Panama	5	Portugal	3	Malaysia	15
Paraguay	1	Romania	1	New Zealand	1
Peru	3	Russian Federation	13	Pakistan	1
Dominican Republic	1	Slovenia	1	Philippines	2
Uruguay	1	Spain	16	Singapore	11
		Sweden	5	South Korea	10
		Switzerland	1	Thailand	11
		Turkey	11		

13

United Kingdom



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