

UFI Global Exhibition Barometer

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

26th Edition

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



Global



Japan



Southern Africa



Macau



United Kingdom



Malaysia



Spain



Russian Federation



Peru



Singapore



Central &
South America



US



South Korea



Thailand



Mexico



Brazil



Indonesia



France



Australia



India



Global Reports



Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

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

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

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

Regional Reports



Regular market overviews on UFI's chapter regions.

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

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

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

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

Topical Reports



Focused reports on challenges and developments within the exhibition industry.

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

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

Best Practices Compendiums – Case studies of successful industry developments.

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

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www.ufi.org/research

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Welcome to the 26th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, conducted in December 2020. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 29 specific markets, including France and Peru for the first time.

UFI launched the barometer on the back of a global crisis – the 2008 Financial Crisis - and this edition updates and adds to the previous one released in July 2020 to produce an assessment on the impact of the COVID-19 pandemic on the exhibition industry in the full year 2020, as well as projections for the future.

With more than 450 participating companies for the second time in a row, the reach of this barometer is unprecedented. It enables us to share specific, vastly expanded insights into 24 markets and 6 regions. This is the result of global collaboration, and we wish to thank all the following associations who take part in the project. In addition to AFEP (Asociación de Ferias del Perú), MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) and UNIMEV (French Meeting Industry Council), who joined as from this latest survey, these are: 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, AFIDA (Asociación Internacional de Ferias de América) in Central and 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, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs), SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

Important remarks

The number of replies to the current survey (457 from 64 countries and regions - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 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%.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at research@ufi.org
This research is available online at www.ufi.org/research

The 26th Barometer surveyed participants' monthly operations, to qualify their level of activity as "normal", "reduced" or "no activity", from July 2020 and including their predictions for the first half of 2021. 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. The following chart presents the results, globally first, and then for each region with comparison to the World. The first series of charts include the level of activity for the first half of 2020, as declared in the 25th Barometer concluded in July.

Globally:

- between April and August 2020, more than half of companies had no activity.
- this situation changed as from September, where a majority of companies declared the return of some operations, reduced for most.
- for 2021, the proportion of companies expecting a "normal" level of activity grows from 10% for January to 37% for June.

Those results vary depending on the region, and they are primarily driven by the "reopening date" of exhibitions; **in all regions, a majority of companies expect both "local" and "national"**

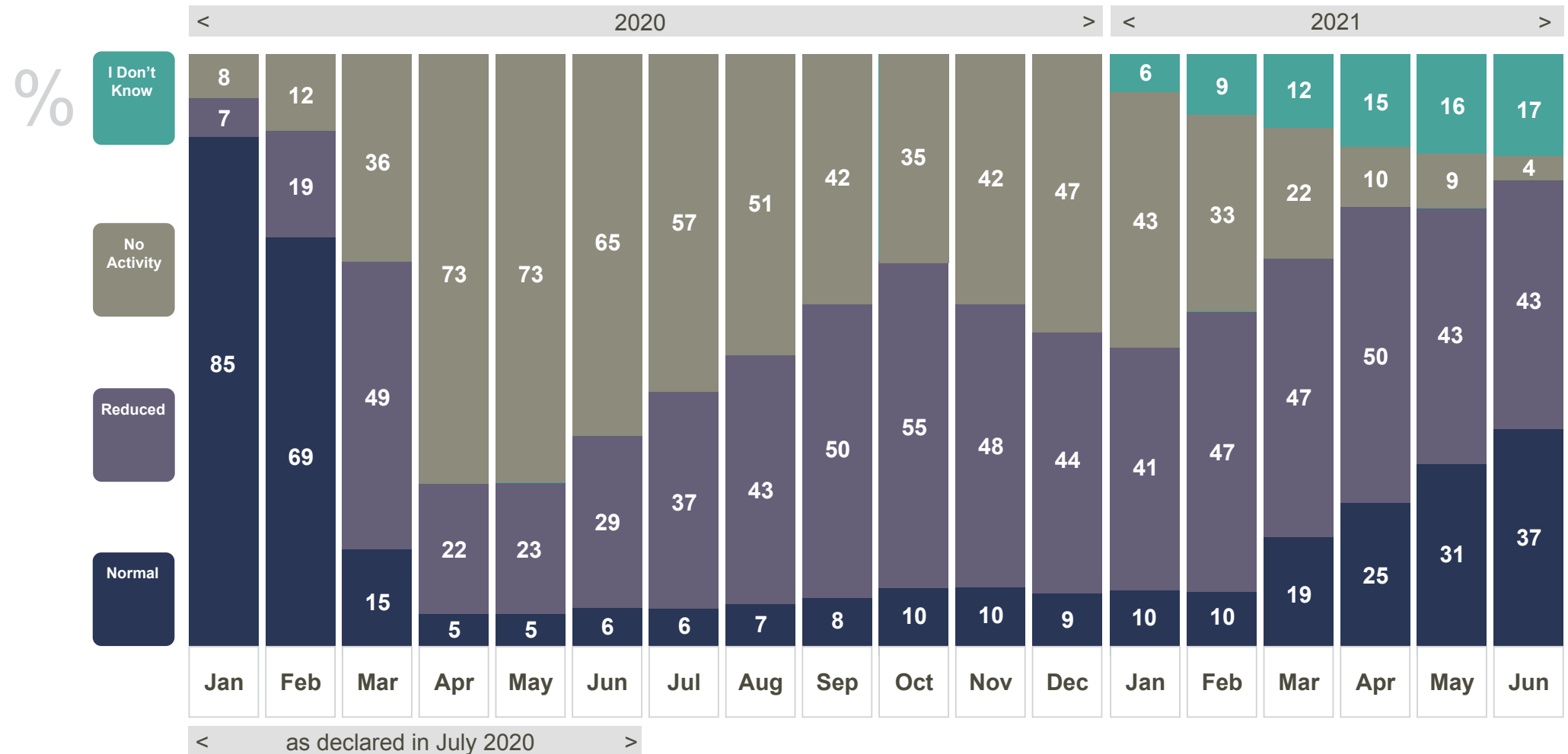
exhibitions to open again by the end of June 2021 latest. But that is not expected until the second half of 2021 for international exhibitions. Company operations also include, for many companies and while face-to-face events are not possible, working into the development of digital solutions.

When looking at the period when a majority of companies declared "no activity" in 2020, it is limited to March-June for Asia/Pacific and April-June for North America, and April-September for Central & South America as well as the Middle East and Africa. For Europe, an initial period lasted from April to August, followed by an additional period from November to December.

When asked what element would most help towards the "bounce back" of exhibitions, **a majority of companies, rank "Readiness of exhibiting companies and visitors to participate again" (64% of answers globally), "Lift of current travel restrictions" (63%) and "Lift of current public policies that apply locally to exhibitions" (52%) first.** These "top 3" elements apply to all regions, except North America, where "Relevant hygiene measures" ranks second (with 51% of answers), and Central and South America & the Middle East / Africa, where "Financial incentive packages leading to reduced costs for the exhibitors" ranks third (with 43% of answers for both regions).



Situation of industry operations in 2020 and current predictions for the 1st half of 2021



Operations - Reopening Exhibitions World & Regions



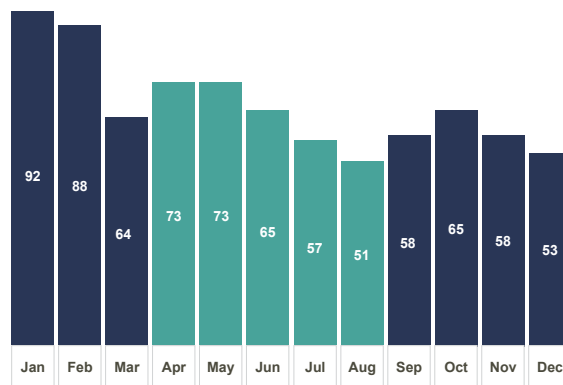
Dominant Status of Operations in 2020

%

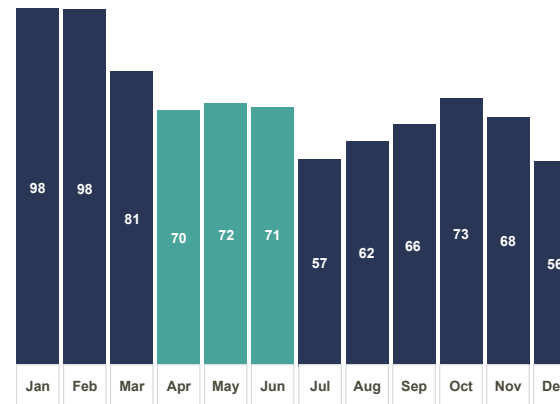
No
Activity

Reduced
or
Normal
Activity

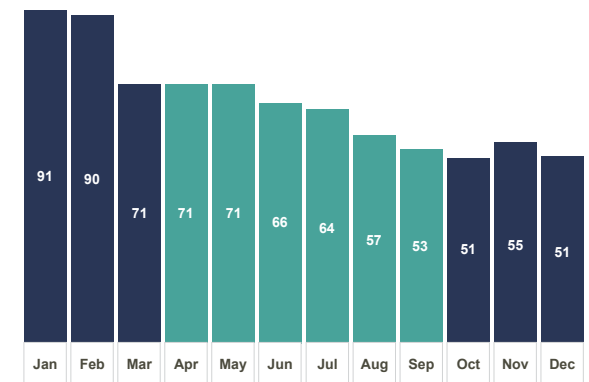
World



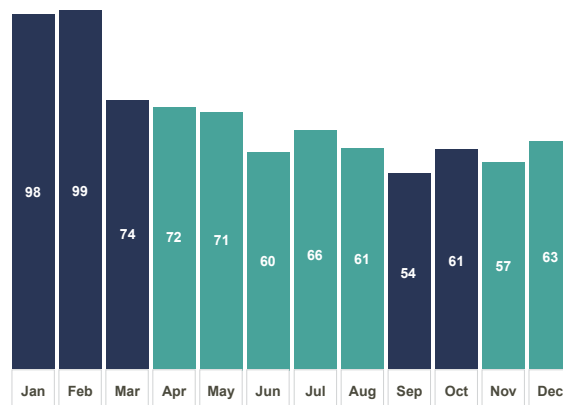
North America



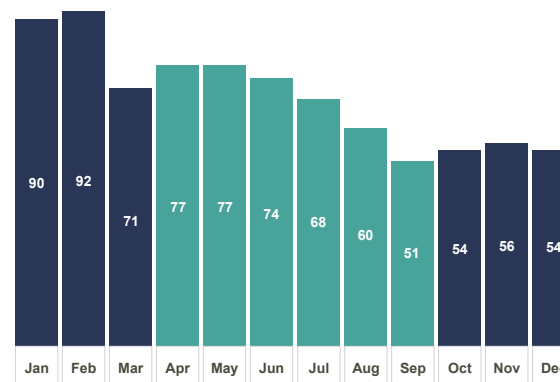
Central and South America



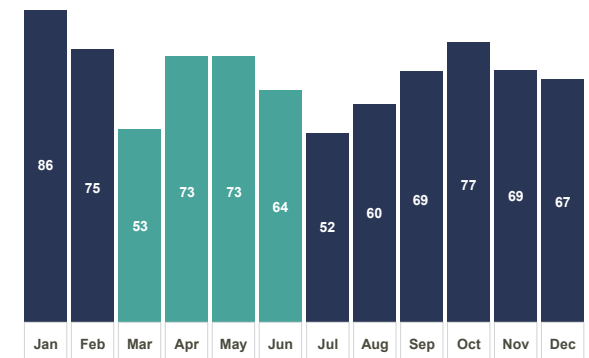
Europe



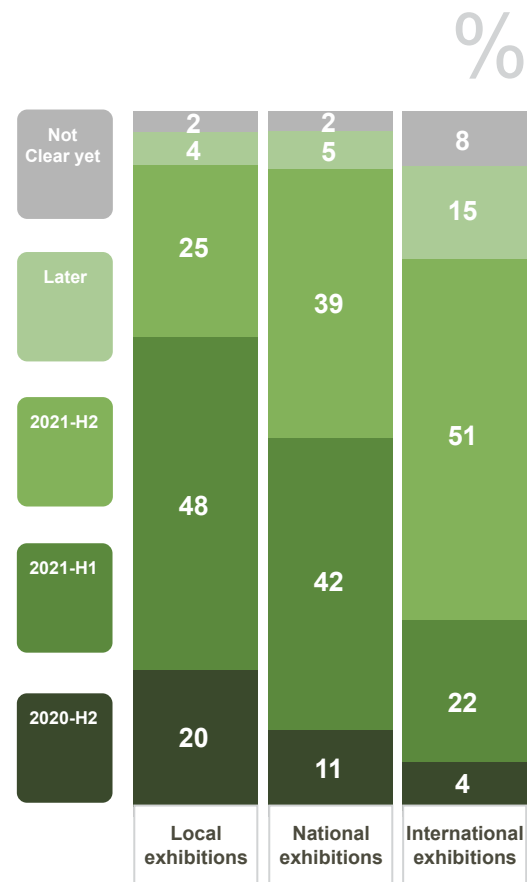
Middle East - Africa



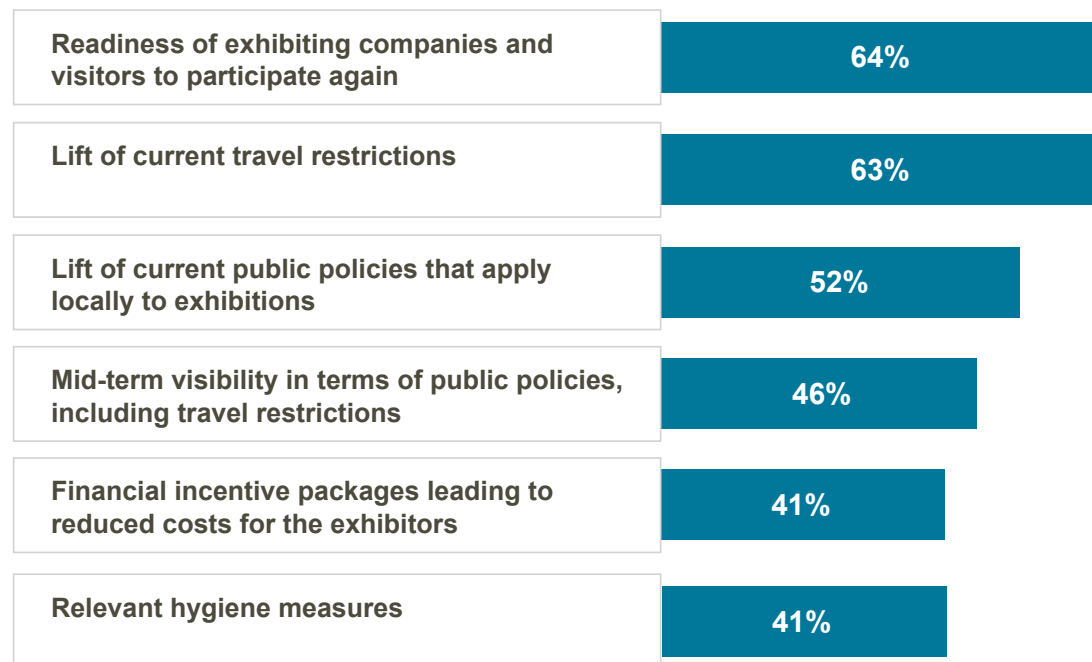
Asia/Pacific



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



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



The 26th Barometer surveyed the evolution of participants' gross turnover, when compared to 2019, for the full year 2020, as well as their expectations for the first half of 2021, and for all of 2021. The survey also questioned the evolution of operating profits for 2020 compared to the previous year.

The following charts present:

- the 2020, H1-2021 and 2021 revenues compared to 2019, on average for all companies, and also broken down per level of revenue realized (0% of last year, less than 25%, etc.).
- the evolution of operating profits for 2020 and also, taken from the previous Barometer, those for 2019.

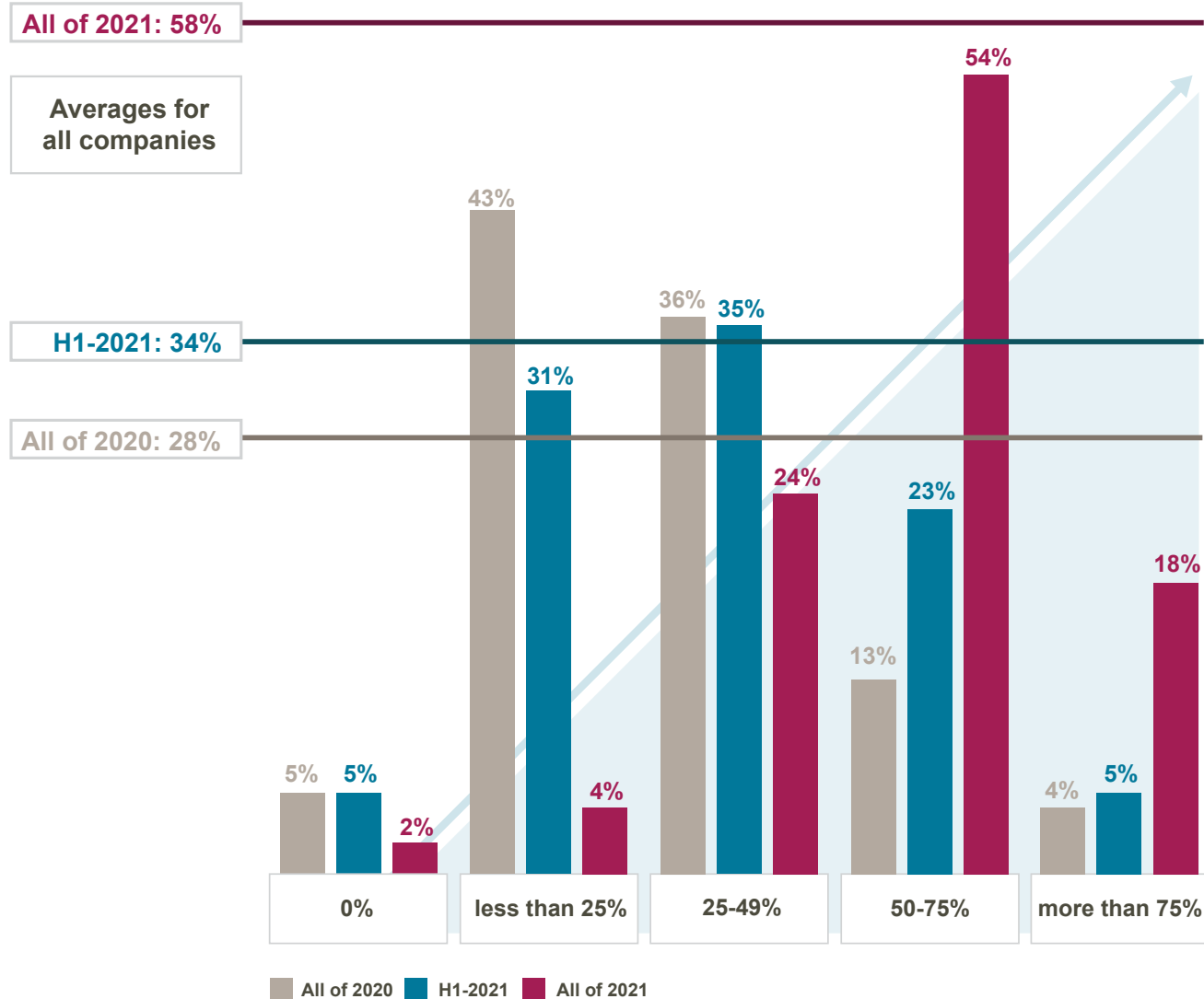
On average globally, revenues for 2020 represented only 28% of the revenues produced for same period last year. Looking at 2021, it is currently expected that the revenues will represent 34% of those of 2019 for the first half of 2021, and 58% for all of 2021.

In terms of profits, 52% of companies faced a loss, and 30% a reduction of their profit by more than 50%.

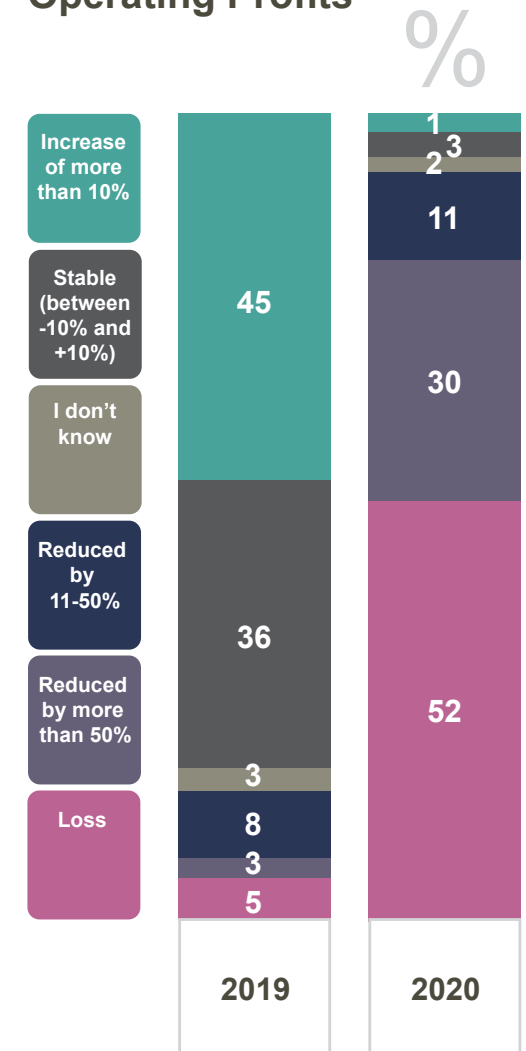
Regional results indicate that:

- The revenue drop for all of 2020 was highest in Central and South America and the Middle East & Africa (respectively only 23% and 24% of the 2019 revenue). Asia-Pacific (27%), Europe (32%) and North America (36%) are on or above the global average; **for 2021, the perspectives are rather similar for all regions: between 32% and 37% of the 2019 revenue for H1-2021, and between 55% and 60% for all of 2021.**
- In terms of profits, the percentage of companies who faced a loss for 2020 varies from 47% in the Asia-Pacific region and Europe, 50% in North America, 58% in the Middle East & Africa, and 64% in Central and South America.

Revenue compared to 2019



Operating Profits



The 26th Barometer surveyed the impact of the COVID-19 crisis regarding public financial support, workforce reduction, and also their perspectives in case of no business for the next 6 months.

Overall, 44% of companies benefitted from some level of public financial support, and for a majority of them it related to less than 10% of their 2019 overall costs.

This public support is stronger in Europe (54%) and Asia/Pacific (53%) than Central & South America (35%), North America (31%) or the Middle East / Africa (13%).

54% of companies had to reduce their workforce, half of them by more than 25%.

Reduction of workforce were stronger in the Middle East / Africa (73%), North America (61%) and Central & South America (56%) than in Europe (52%) or Asia/Pacific (49%).

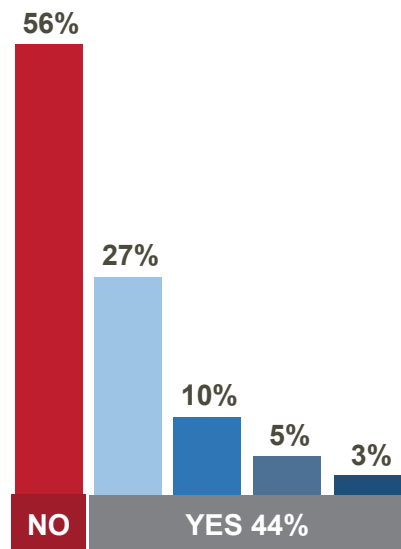
10% of companies state they will have to close down if there is no business for the next 6 months (5% in North America, 6% in Asia/Pacific, 10% in Central & South America, 14% in Europe and 17% for the Middle East / Africa).

For 57% globally, “it will be hard, but we can keep our heads above water”, while 33% of companies consider they will manage (this proportion varies from 26% in Europe to 40% in Asia/Pacific).

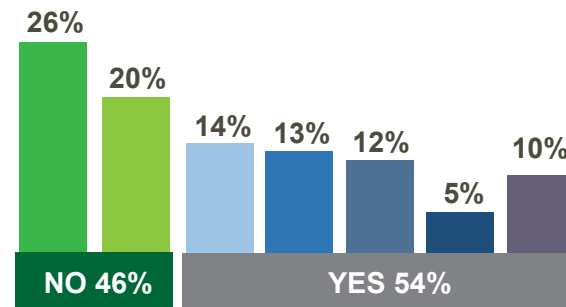
Public Financial Support – Workforce – Perspectives WORLD



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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

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

Most Important Business Issues

Companies were asked to identify the **three most important issues** for their business in the coming year from a pre-defined list of eight issues, including the “Impact of COVID-19 pandemic on the business”. Multiple choices were proposed to get further insights for some answers.

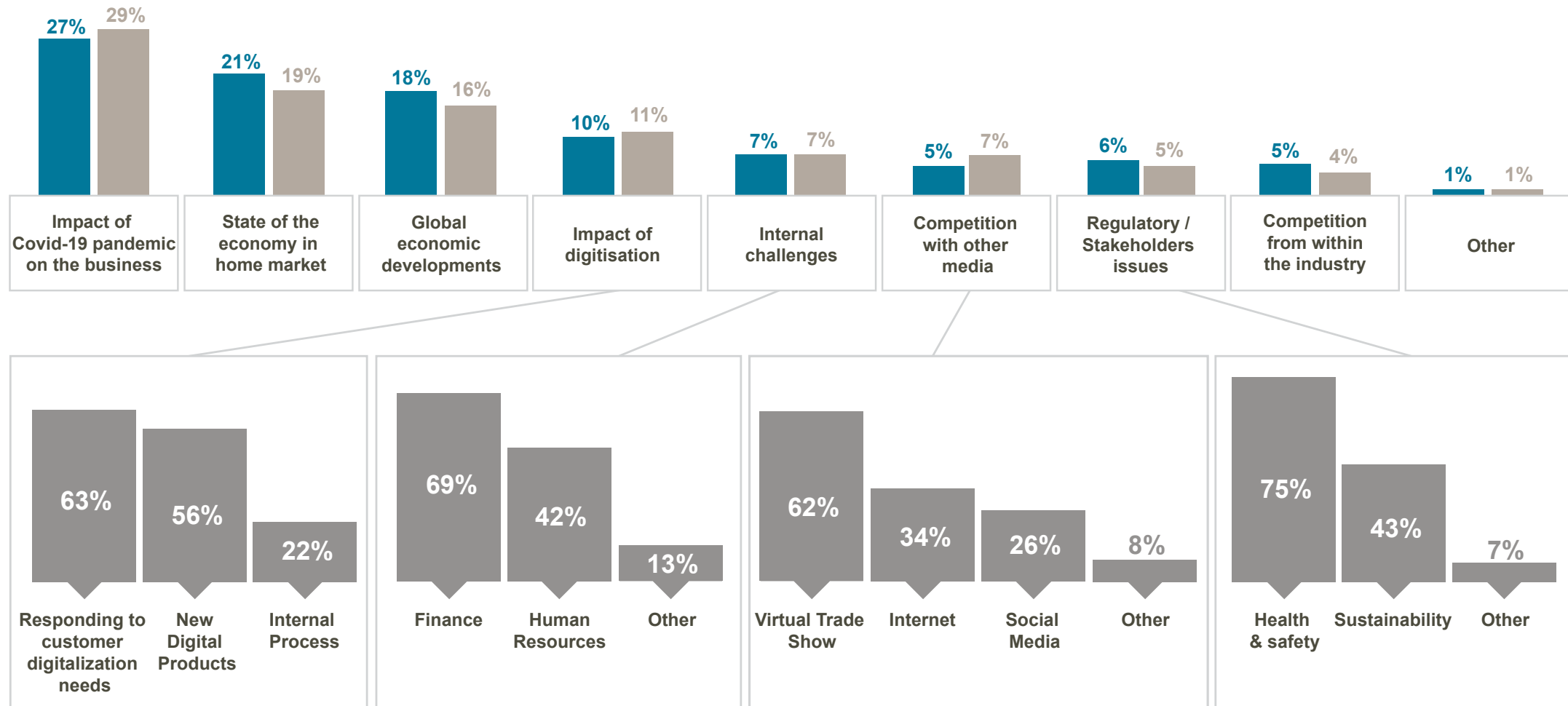
“Impact of COVID-19 pandemic on the business” is considered as the most important business issue (29% of combined answers, a 2% increase compared to 6 months ago). “Impact of digitalisation” (11% of answers) and “Competition with other media” (7%) are also increasing (by respectively +1% and +2%), while “State of the economy in home market” (19%) and “Global economic developments” (16%) decrease but remain among the top 3 concerns. “Internal challenges” (7%) and “Competition from within the industry” (4%), that always were in the top four most important business issues before the COVID-19 crisis, have been ranked below for the last 2 surveys. “Regulatory / Stakeholders issues” keeps a similar level to the last survey (5%).

The following pages show the consolidated results, for the world and by region. While “Impact of COVID-19 pandemic on the business” is the top priority in all regions, “Global economic developments” are ranked higher in the Middle East / Africa (23%) than in other regions. It can also be noticed that the “Impact of digitalisation” is ranked higher in North America (15%) and Europe (14%) than in the other regions.

Further insight is also provided by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”), and the main differences can be spotted as to the 4th issue for each category: “Impact of digitalisation” for Organisers (13% of answers), “Internal challenges” for venues only (10%) and “Regulatory / Stakeholders Issues” for Service providers (8%).

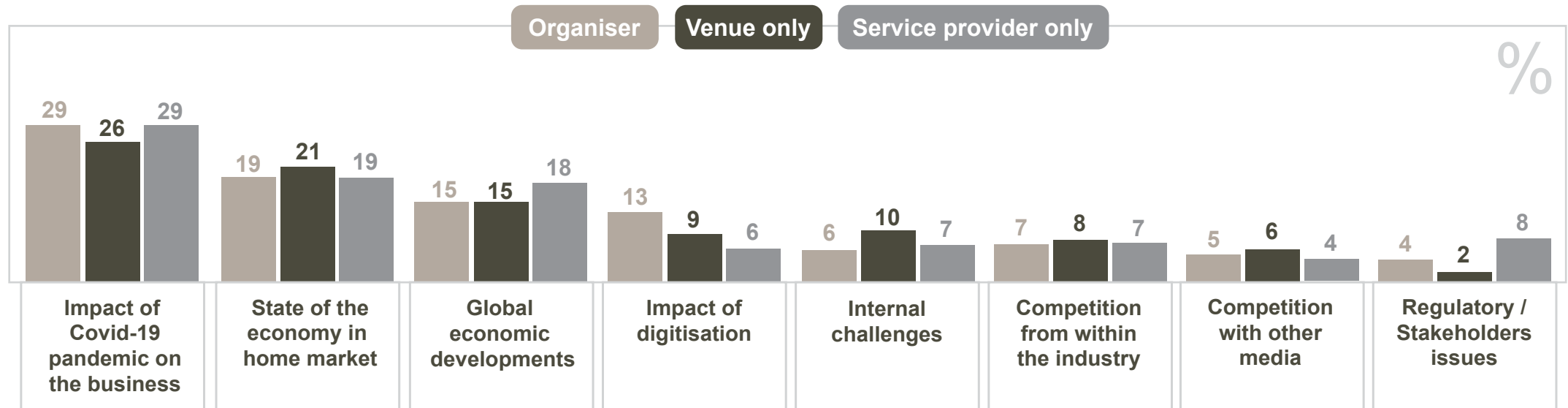
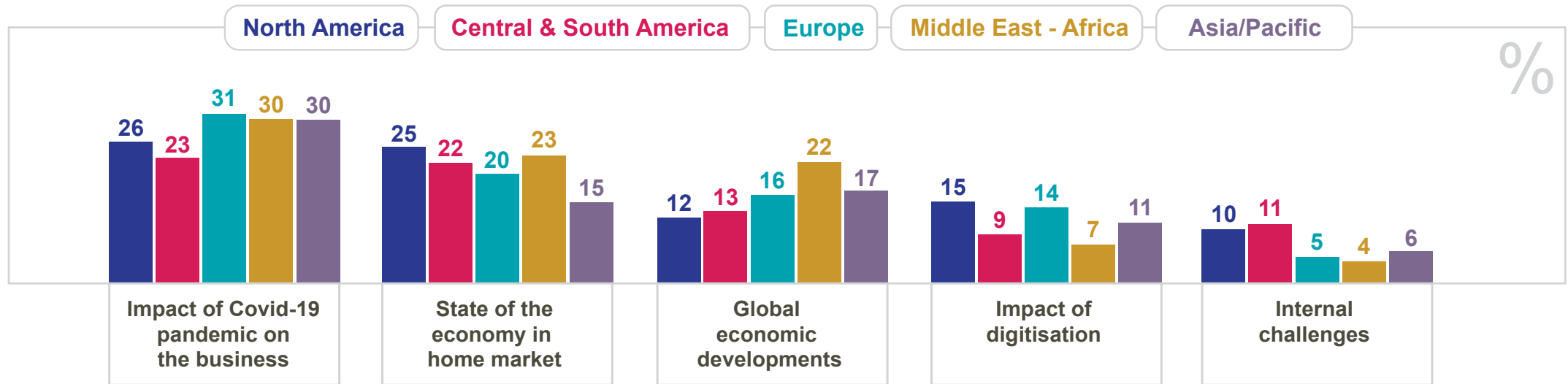
Results from previous survey - June 2020

Results from current survey - Dec 2020



(multiple answers possible)

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



The 26th Barometer surveyed 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 asked 6 months ago, the comparisons allow to identify trends.

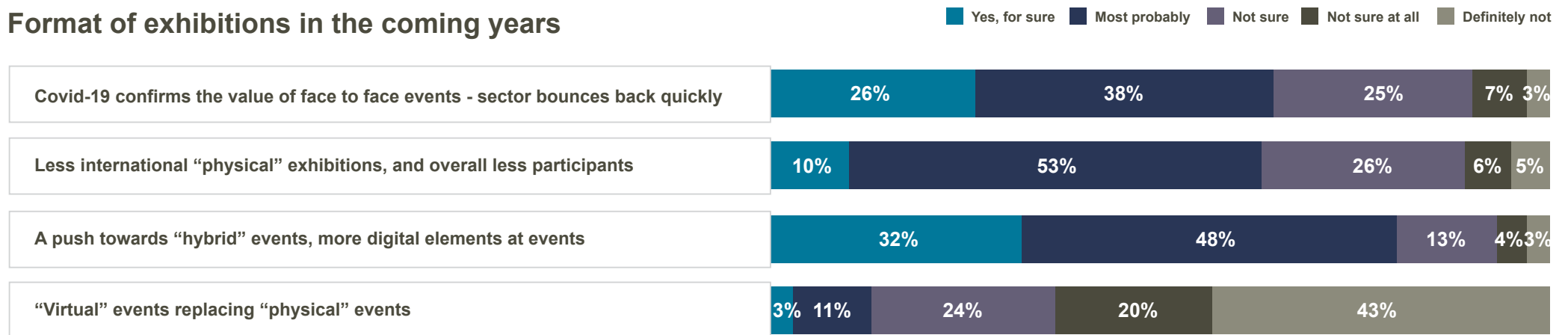
Global results indicate that:

- **64% - compared to 57% 6 months ago - are confident that “COVID-19 confirms the value of face- to-face events” anticipating that the sector will bounce back quickly** (26% “Yes, for sure” and 38% “Most probably”), but 32% are “Not sure” (31% 6 months ago).
- **63% - compared to 57% 6 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants”** (10% “Yes, for sure” and 53% “Most probably”), and 34% are “Not sure”.
- **80% of companies – close to the 82% from 6 months ago - consider that there is “A push towards hybrid events, more digital elements at events”** (32% “Yes, for sure” and 48% “Most probably”).
- **A minority of 14% - close to the 17% from 6 months ago - agrees with “Virtual events replacing physical events”** (3% “Yes, for sure” and 11% “Most probably”), and 44% are “Not sure”.

There are two significant regional differentiations:

- “COVID-19 confirms the value of face- to-face events”, more widely agreed in the Middle East / Africa (70% of companies), Asia/Pacific (69%) and Europe (67%) than North America (55%) or Central and South America (53%)
- “Virtual events replacing physical events”, with stronger and opposing views – from Europe, where 74% of companies disagree, and from North America, where “only” 57% do.

Format of exhibitions in the coming years



Part 2: Detailed results or 5 regions and 24 countries

North America:

Mexico
US

Central and South America:

Argentina
Brazil
Peru
Colombia

Europe:

France
Germany
Italy
Russian Federation
Spain
Turkey
United Kingdom

Middle East / Africa:

South Africa
UAE

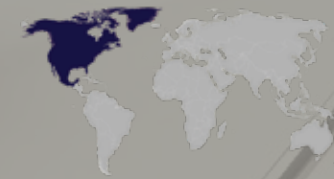
Asia/Pacific:

Australia
China
Hong Kong
India
Japan
Malaysia
Singapore
South Korea
Thailand

A network diagram consisting of several blue, reflective spheres of varying sizes connected by thin, light blue lines. The spheres are arranged in a non-linear, interconnected pattern, suggesting a network or communication structure. The background is a solid, medium blue color.

North America

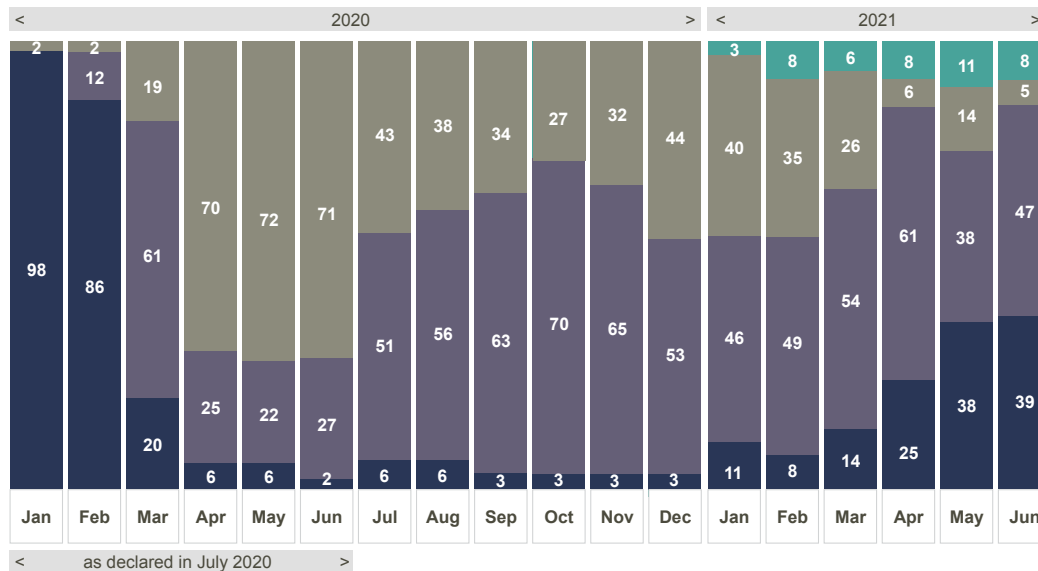
Operations - Reopening Exhibitions North America



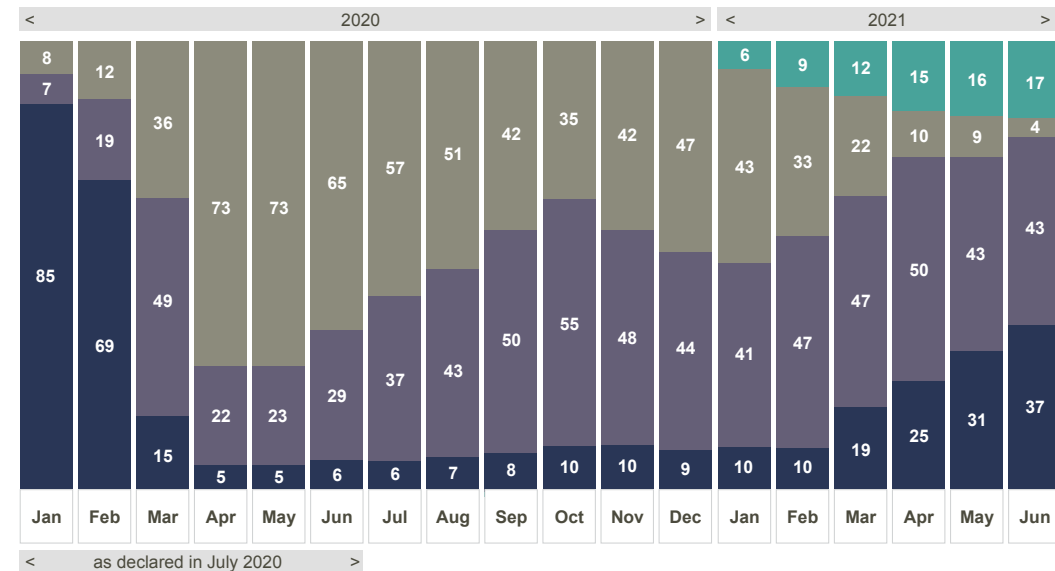
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



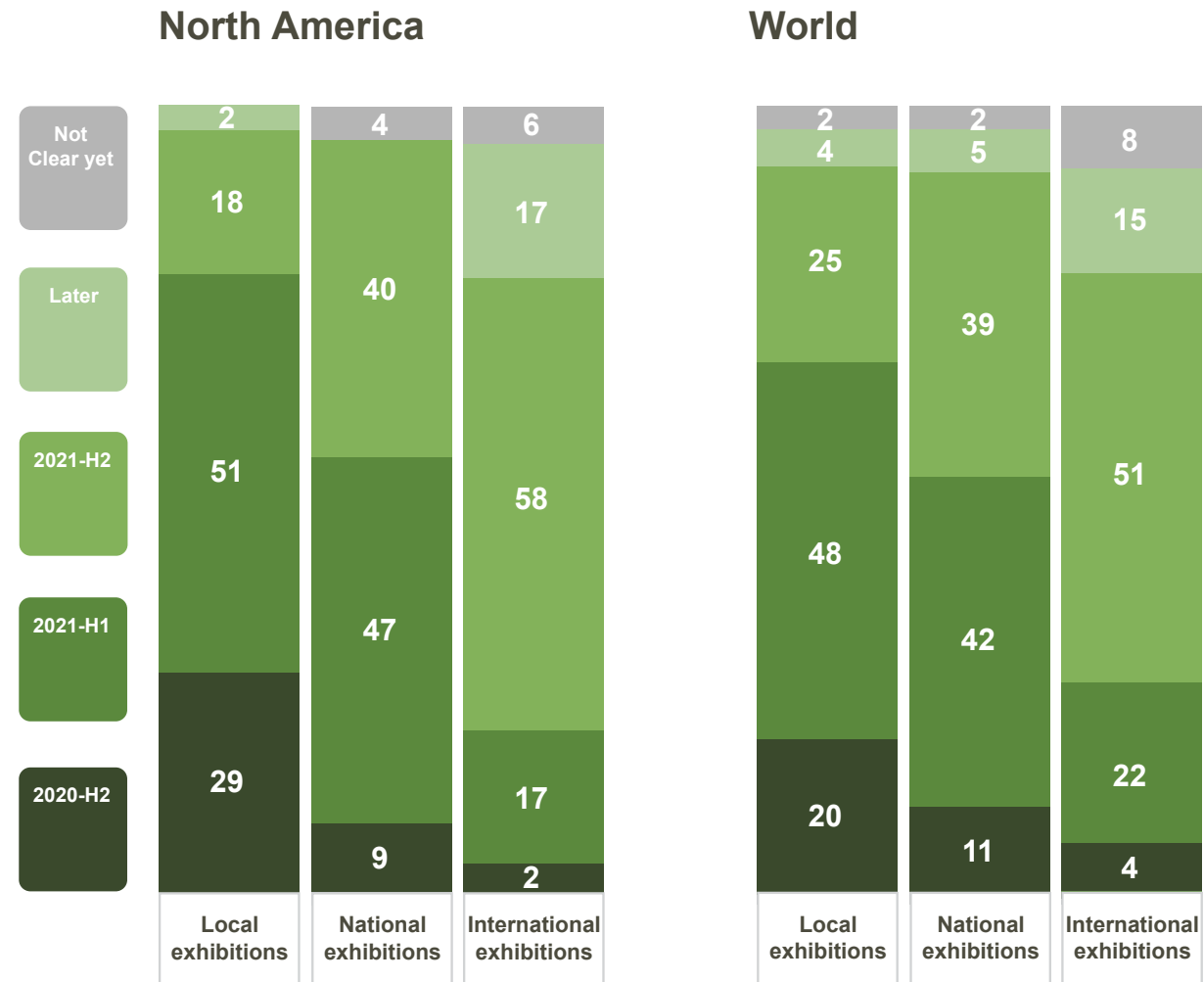
North America



World



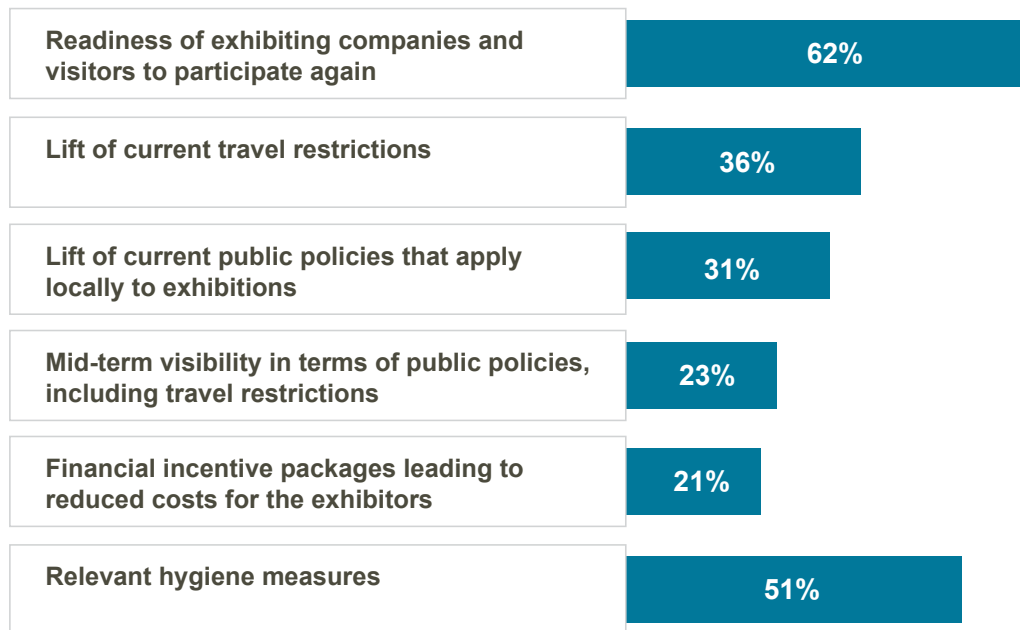
When do you believe exhibitions will open again in your city?



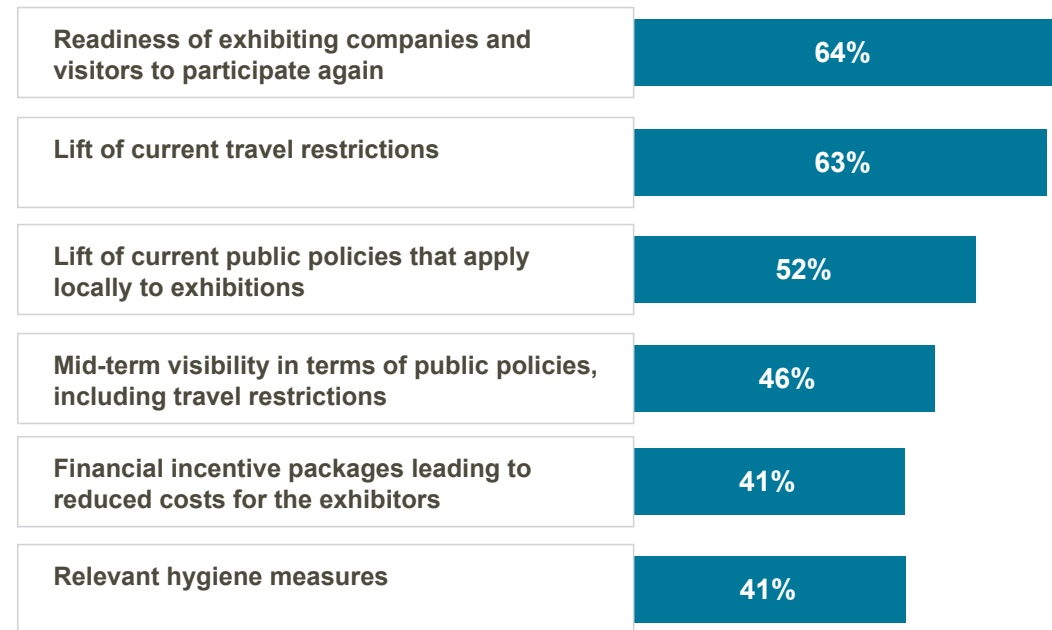


What do you believe would most help the “bounce back” of exhibitions?

North America

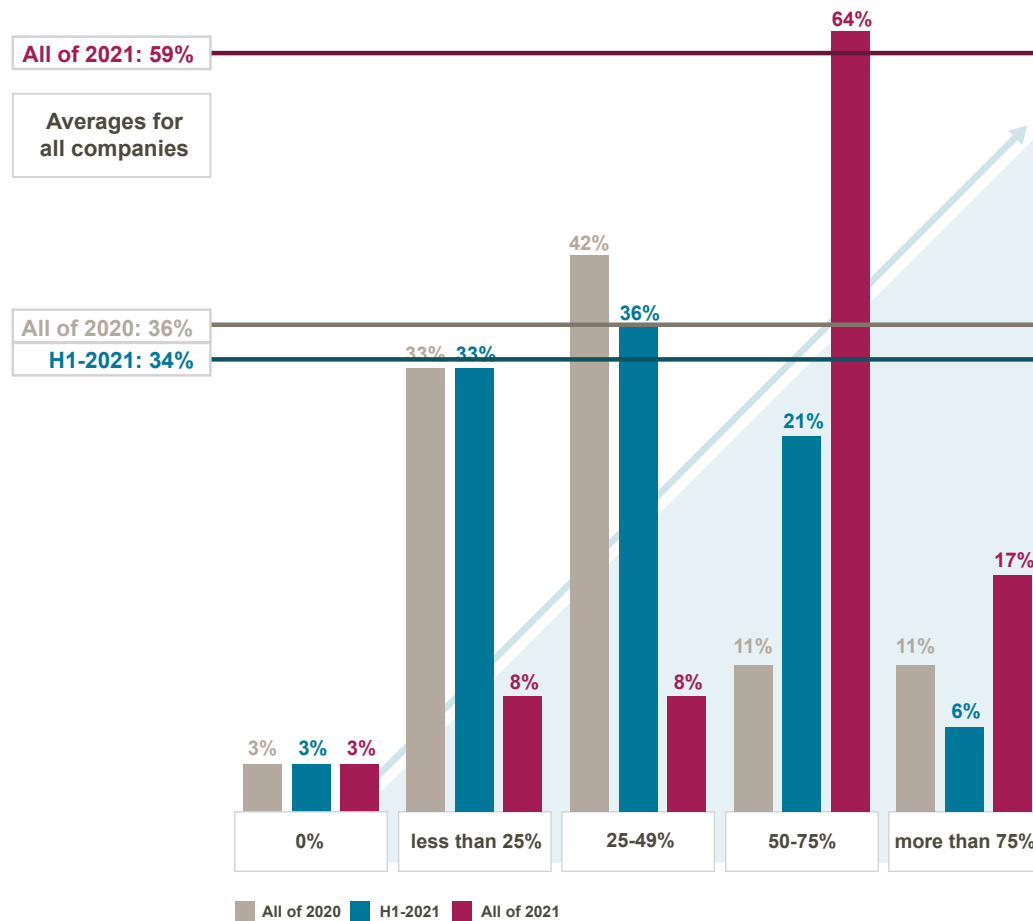


World

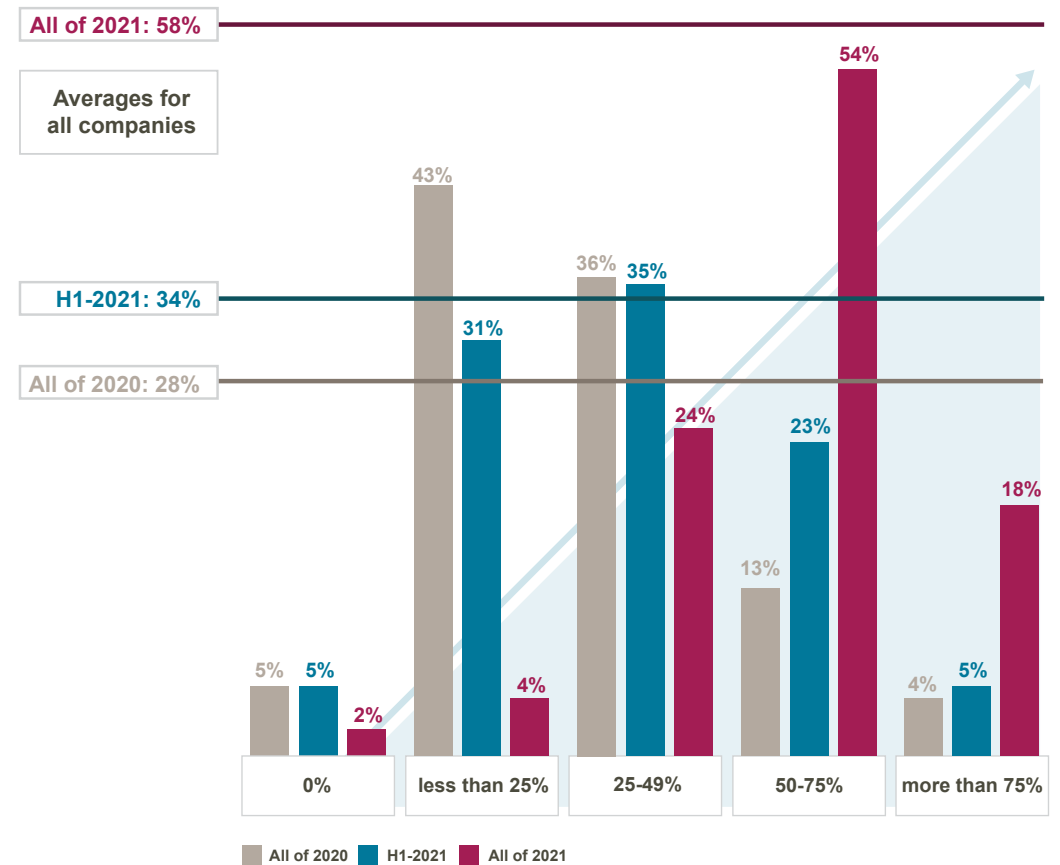


Revenue compared to last year (2019)

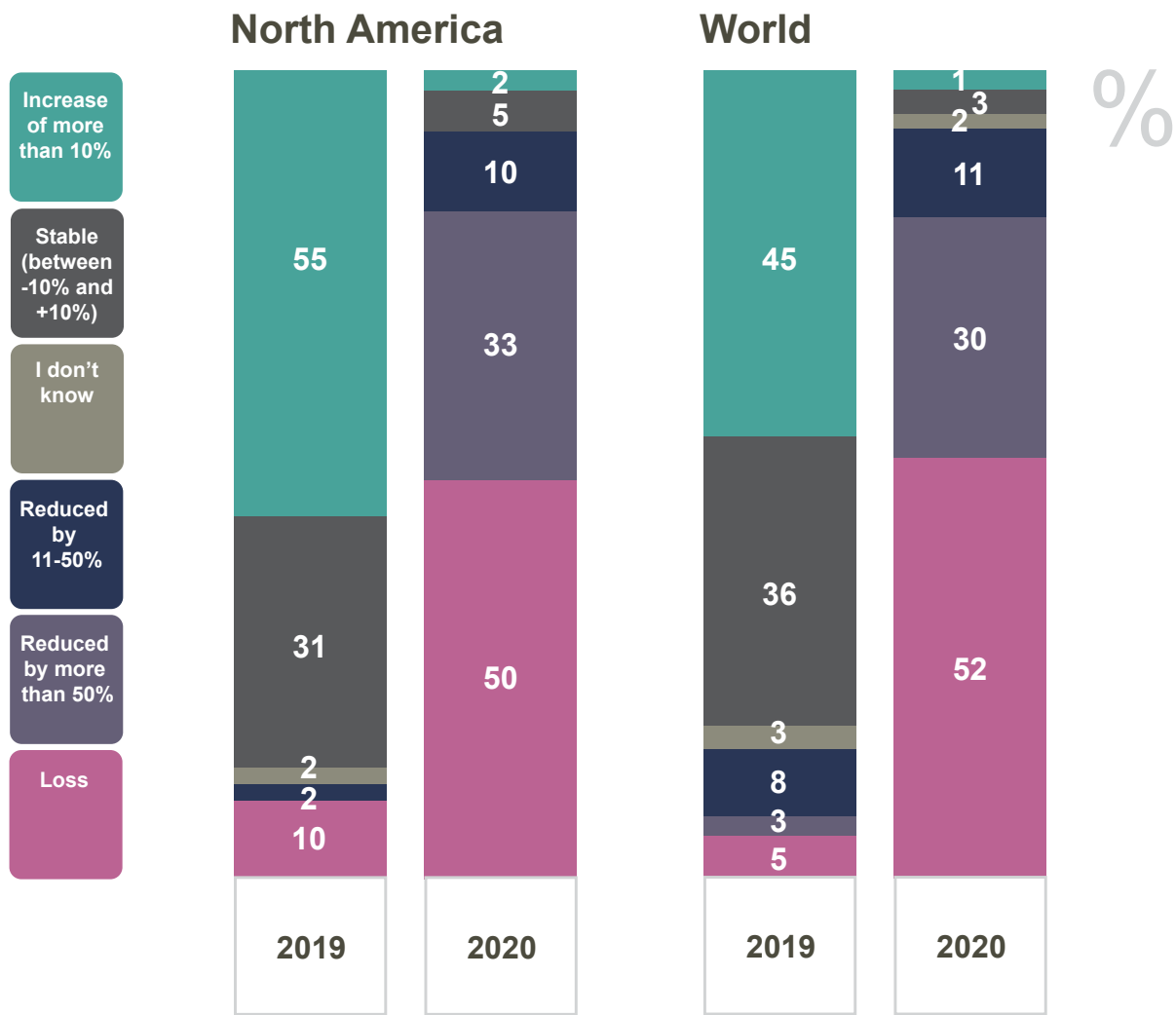
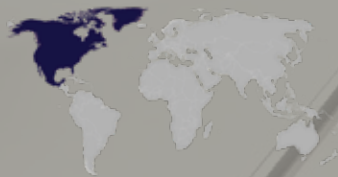
North America

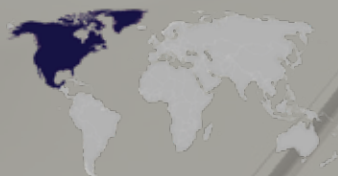


World



Operating Profits North America

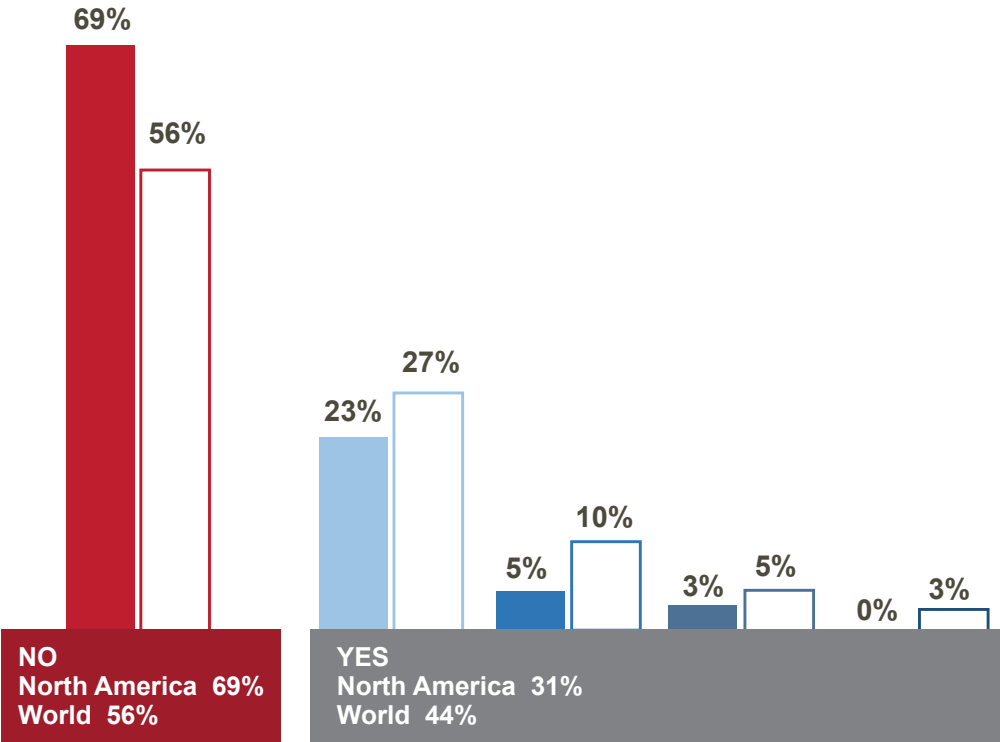




Did your company benefit from public financial support?

North America World

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

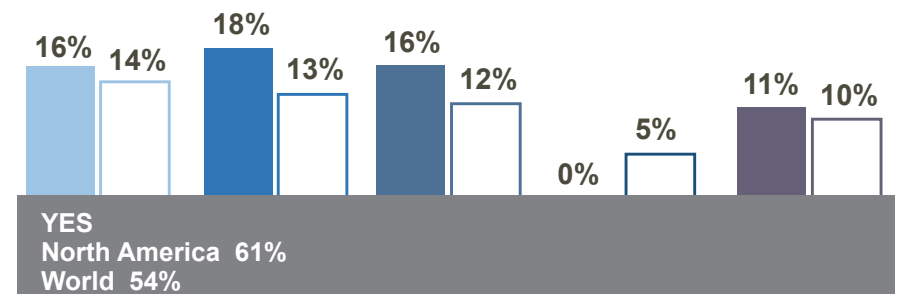
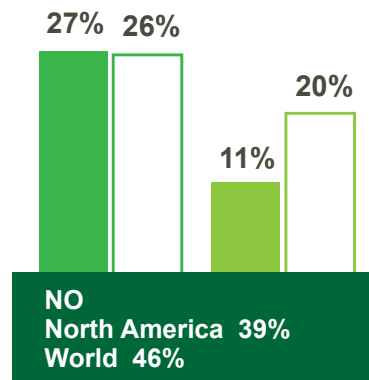


Have you had to reduce your workforce?

North America





World

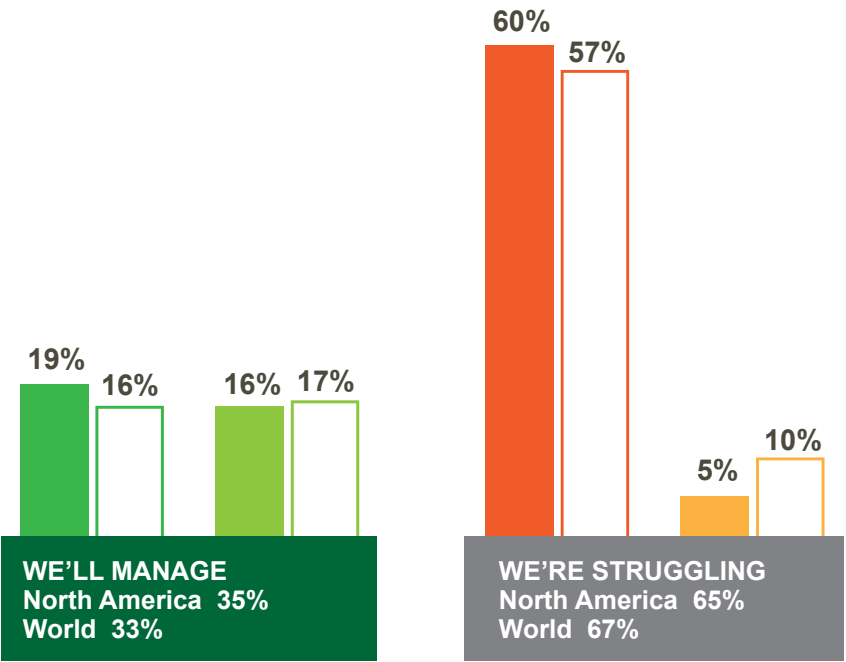
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum



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

North America World

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

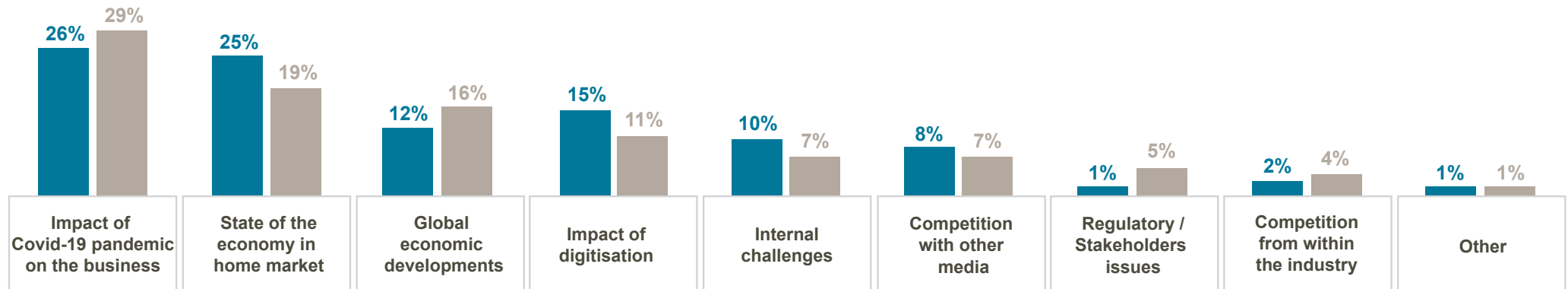


Most Important Business Issues - Format of Exhibitions - North America

Most important business issues in the exhibition industry

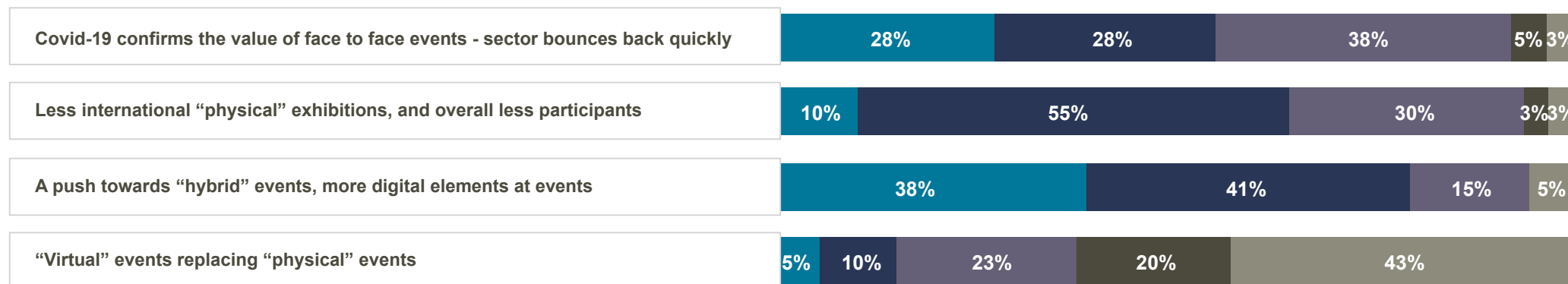
North America

Global



Format of exhibitions in the coming years

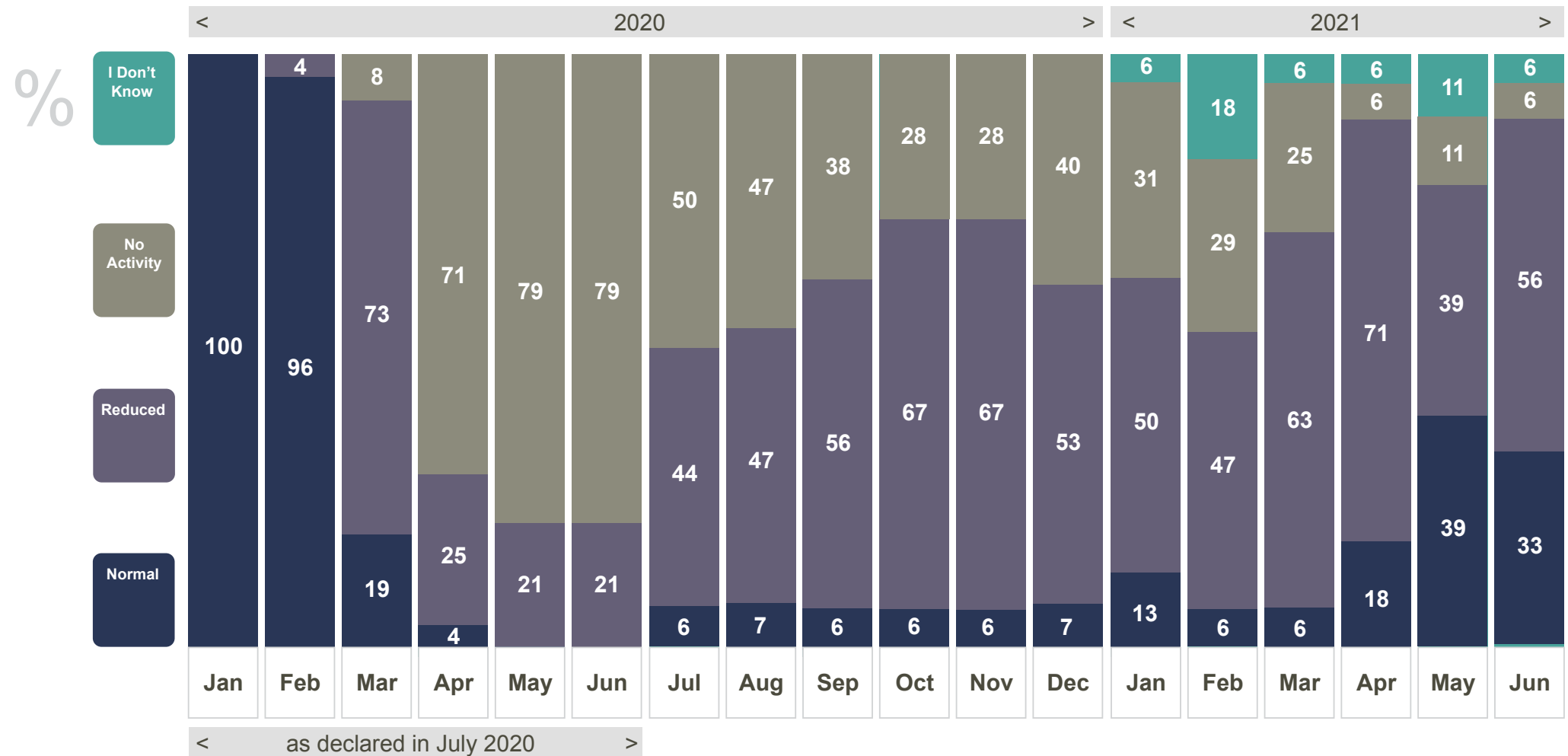
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Mexico



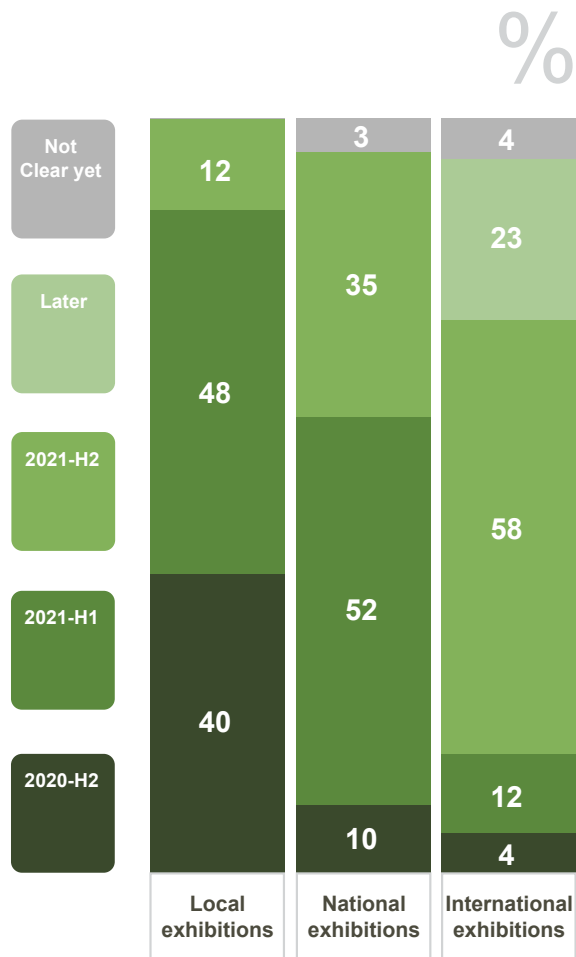
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



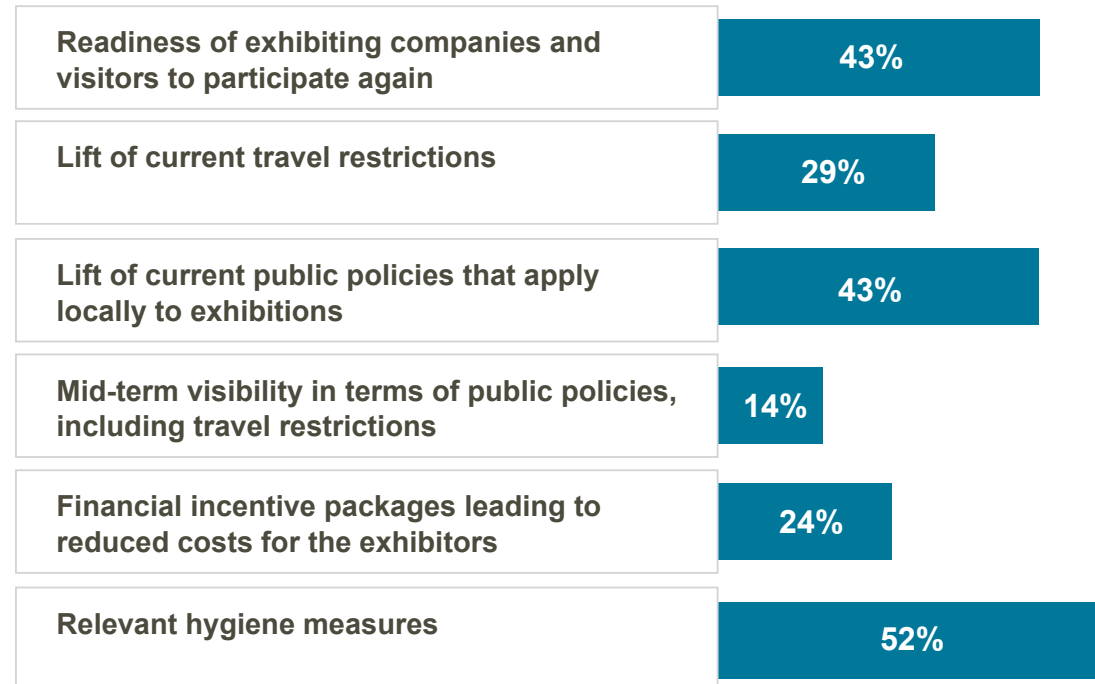
Detailed results for Mexico



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



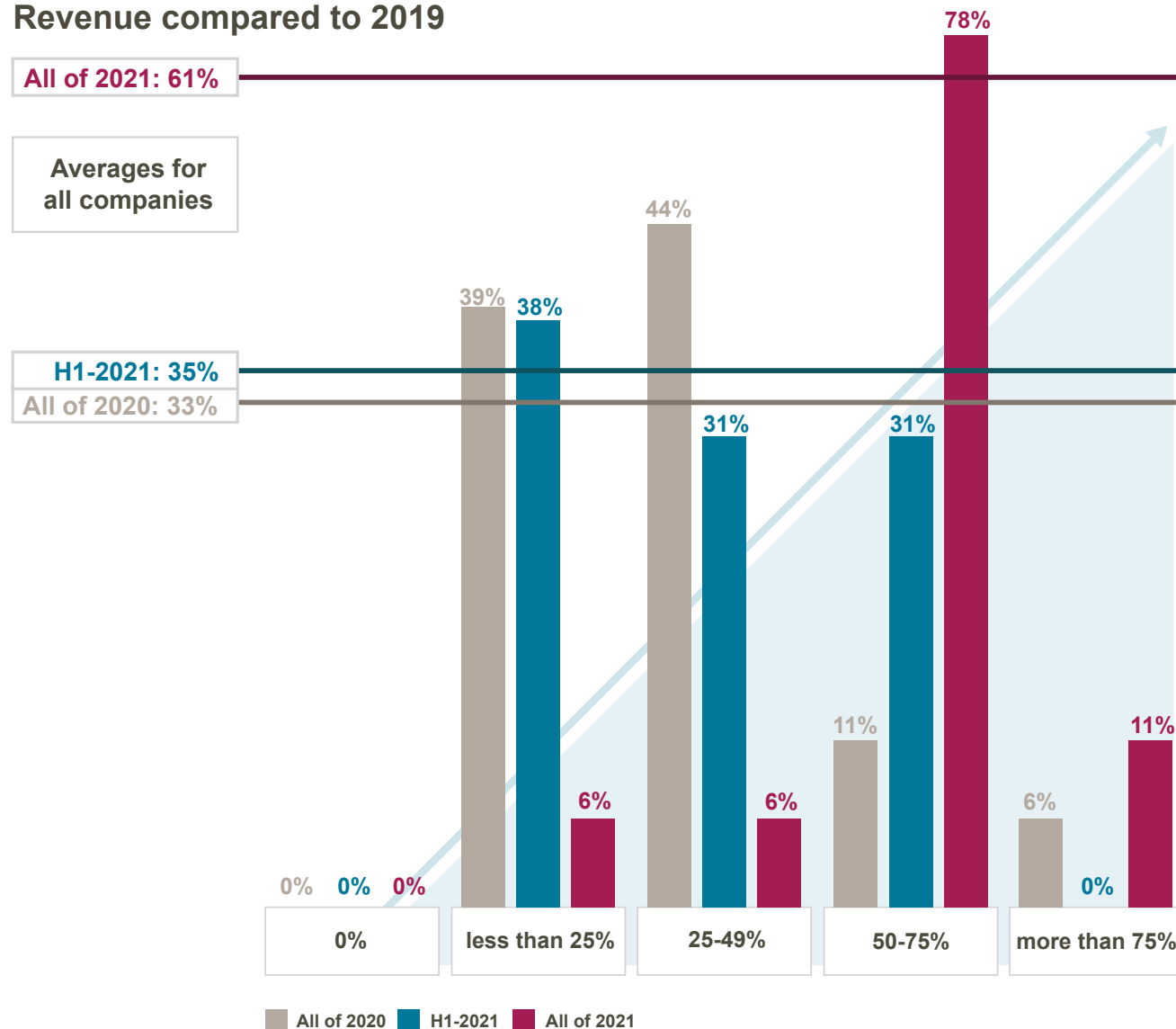
What do you believe would most help the “bounce back” of exhibitions?



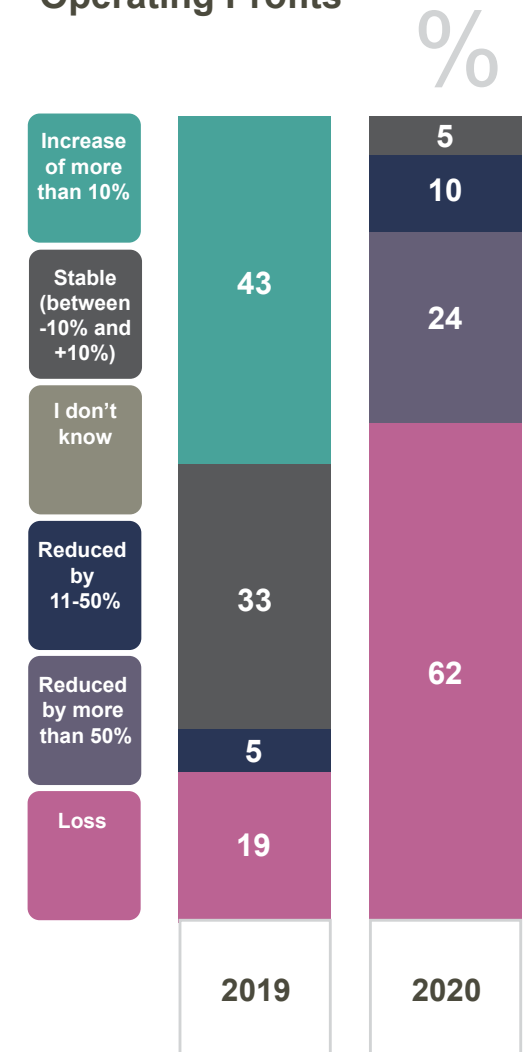
Detailed results for Mexico



Revenue compared to 2019



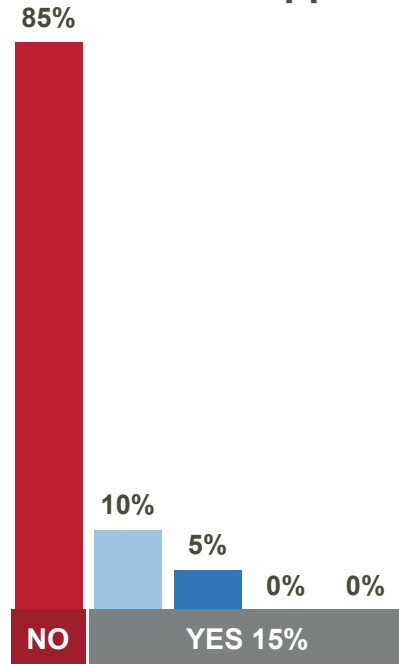
Operating Profits



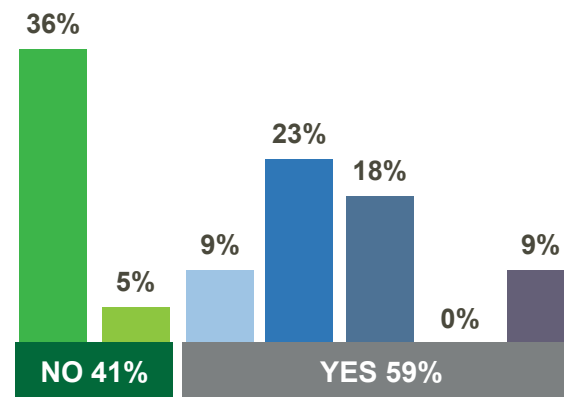
Detailed results for Mexico



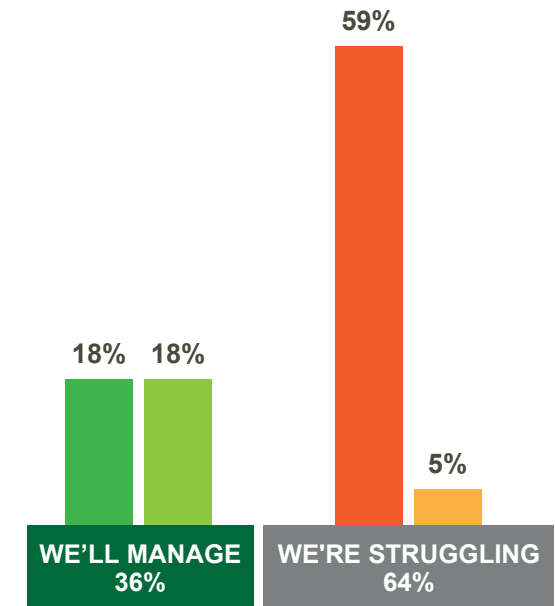
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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

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

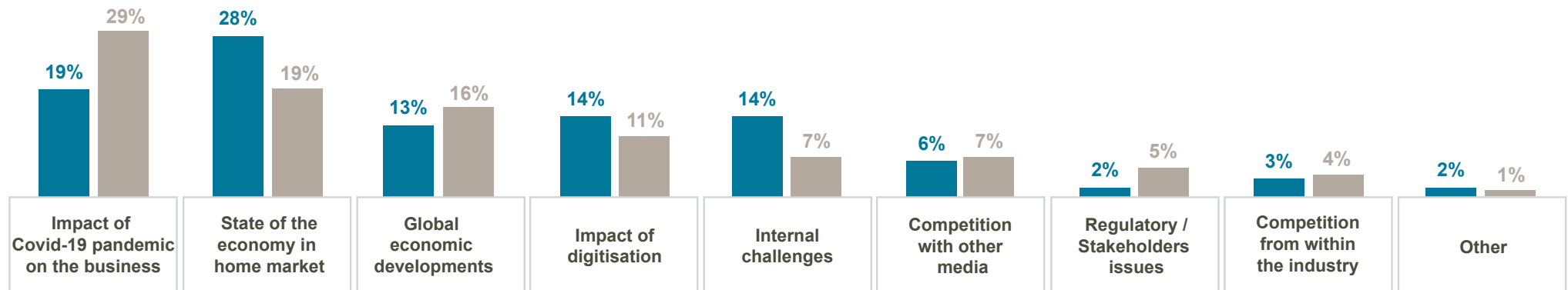
Detailed results for Mexico



Most important business issues in the exhibition industry

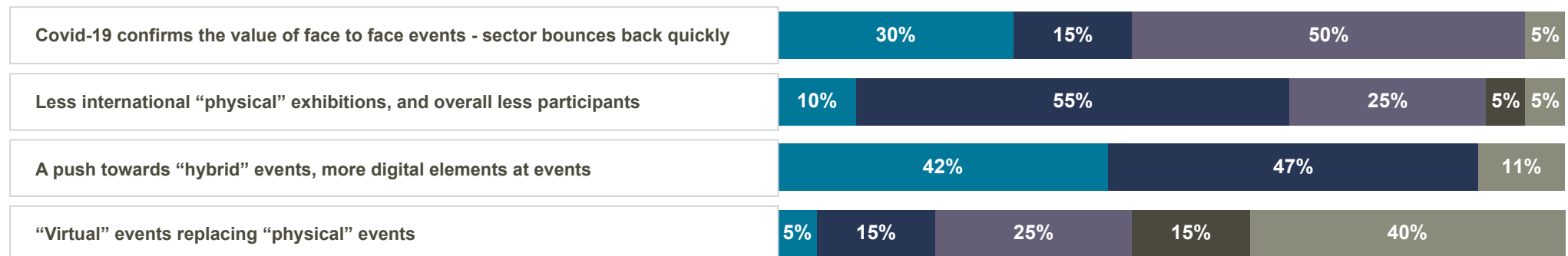
Mexico

Global



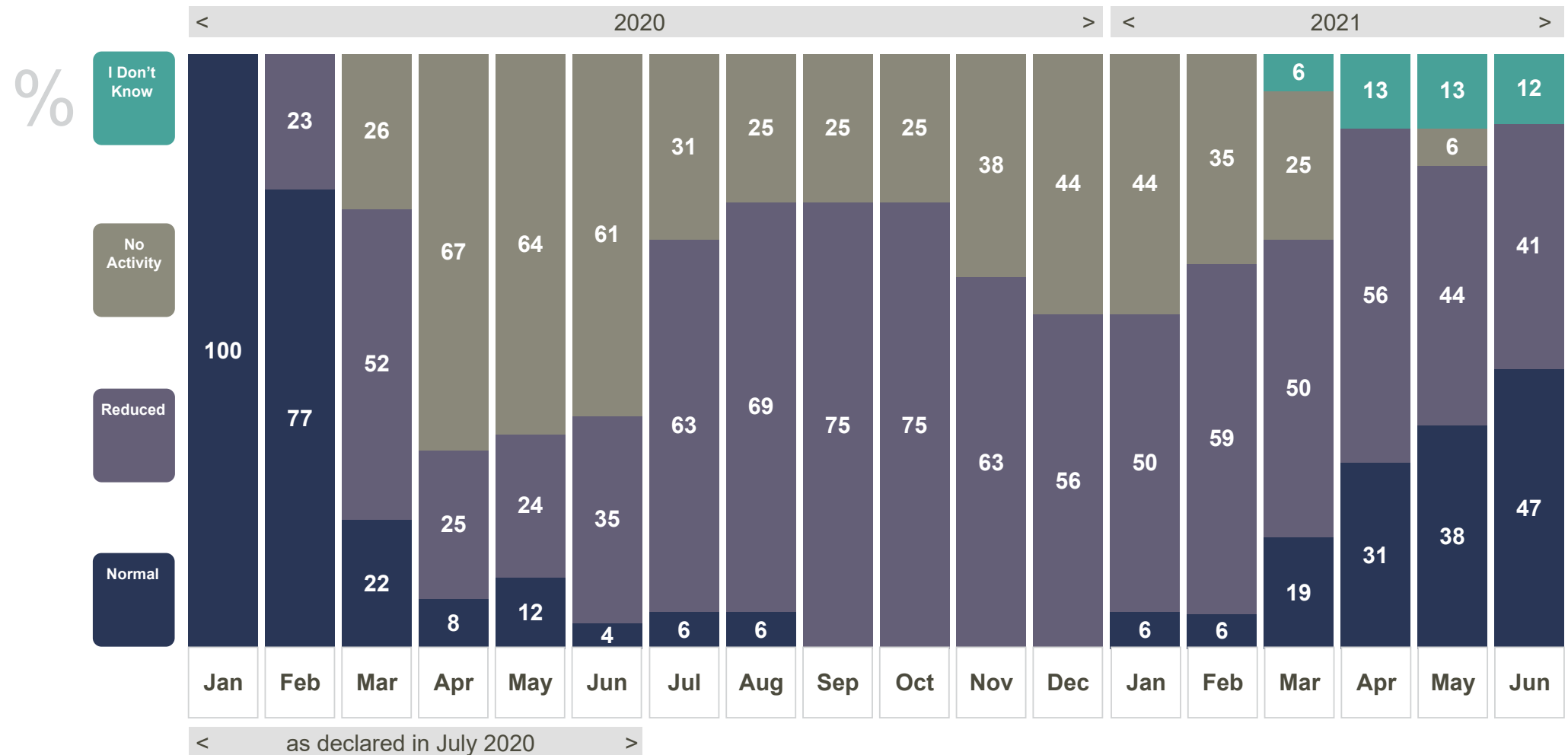
Format of exhibitions in the coming years

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



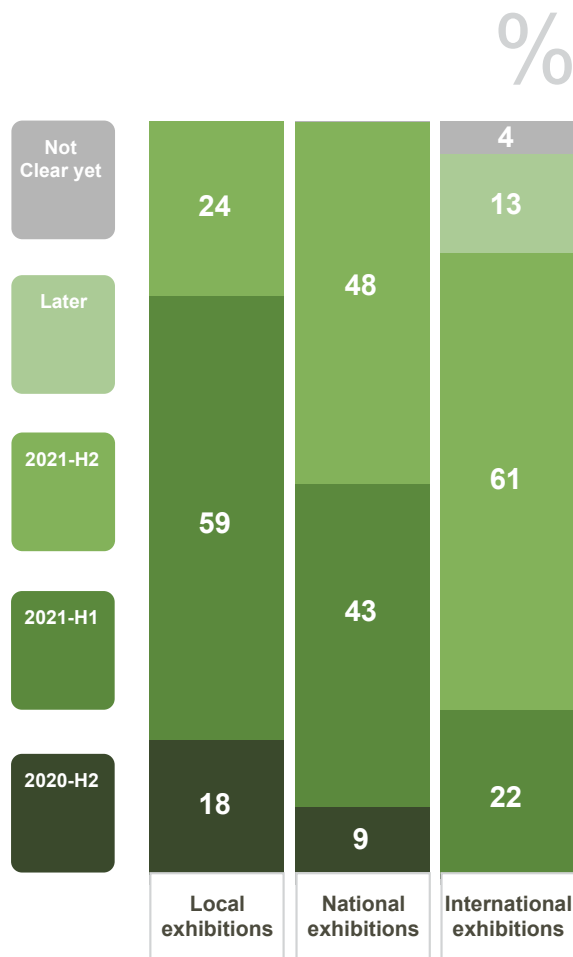


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

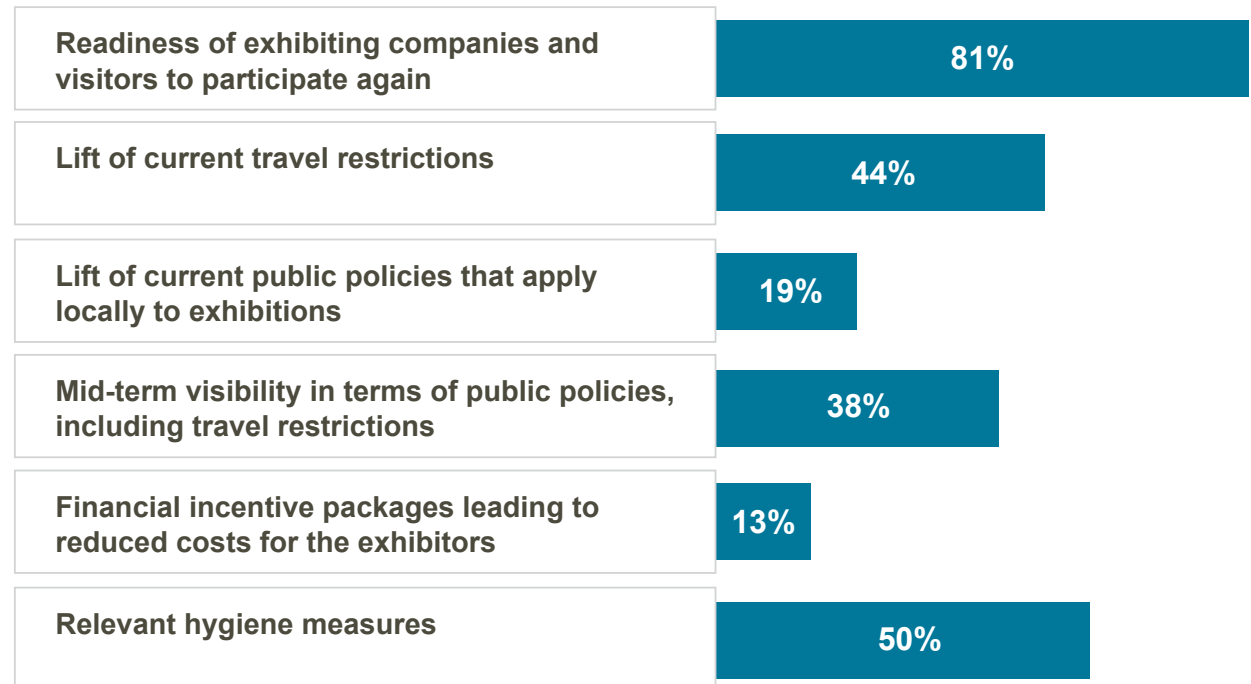




When do you believe exhibitions will open again in your city?



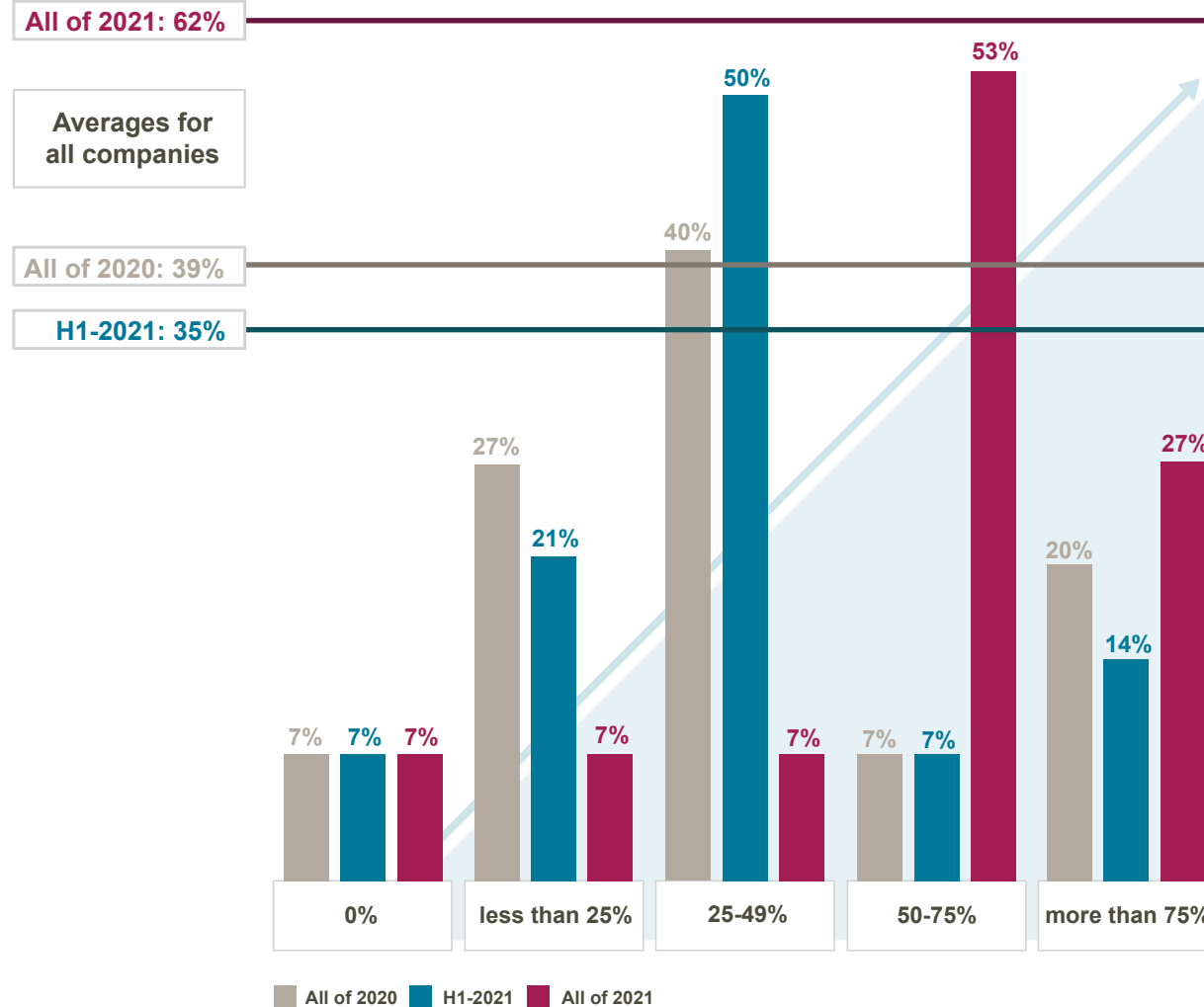
What do you believe would most help the “bounce back” of exhibitions?



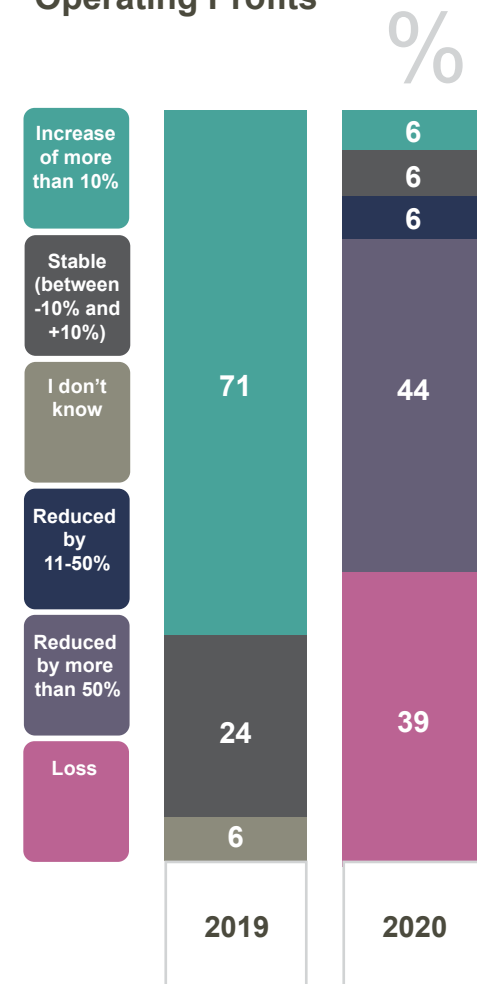
Detailed results for US



Revenue compared to 2019



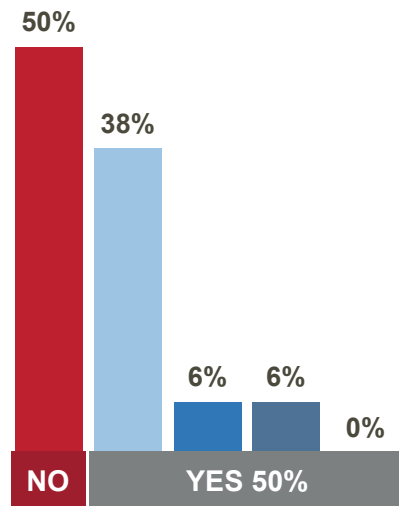
Operating Profits



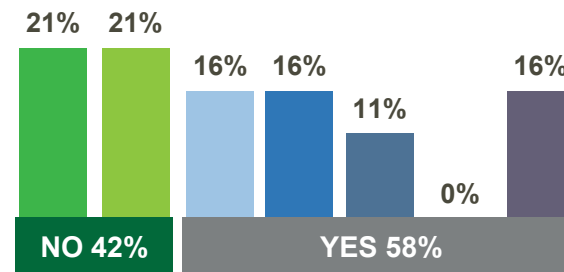
Detailed results for US



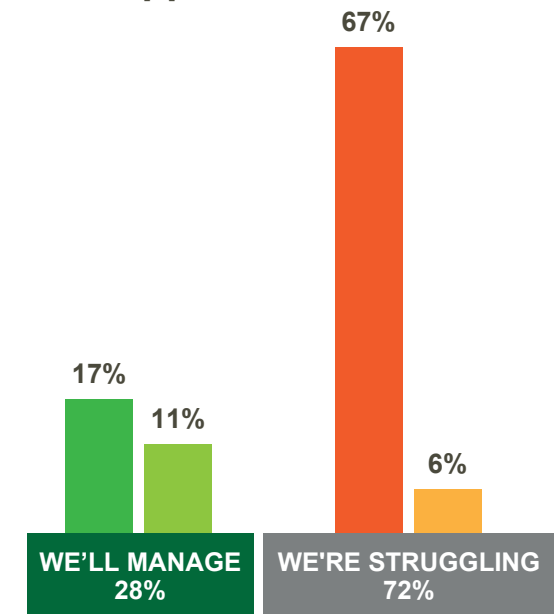
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
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- I'm afraid we'd have to close down

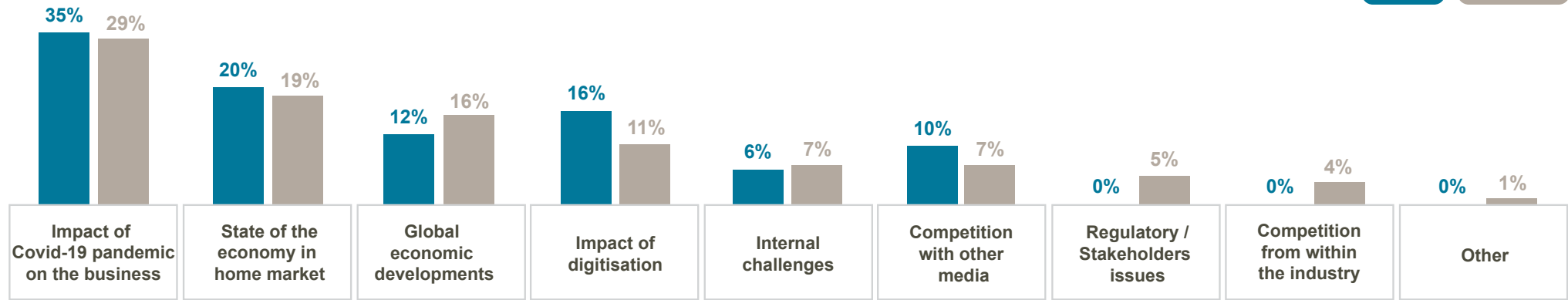
Detailed results for US



Most important business issues in the exhibition industry

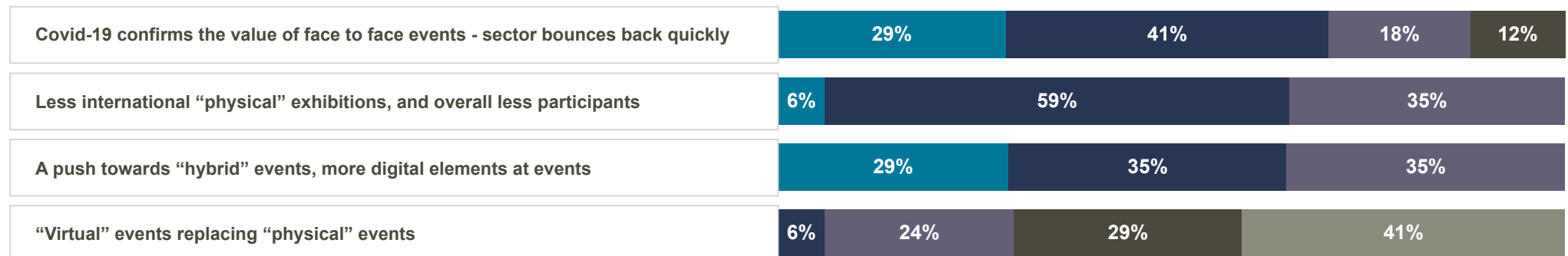
USA

Global



Format of exhibitions in the coming years

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



Central and South America



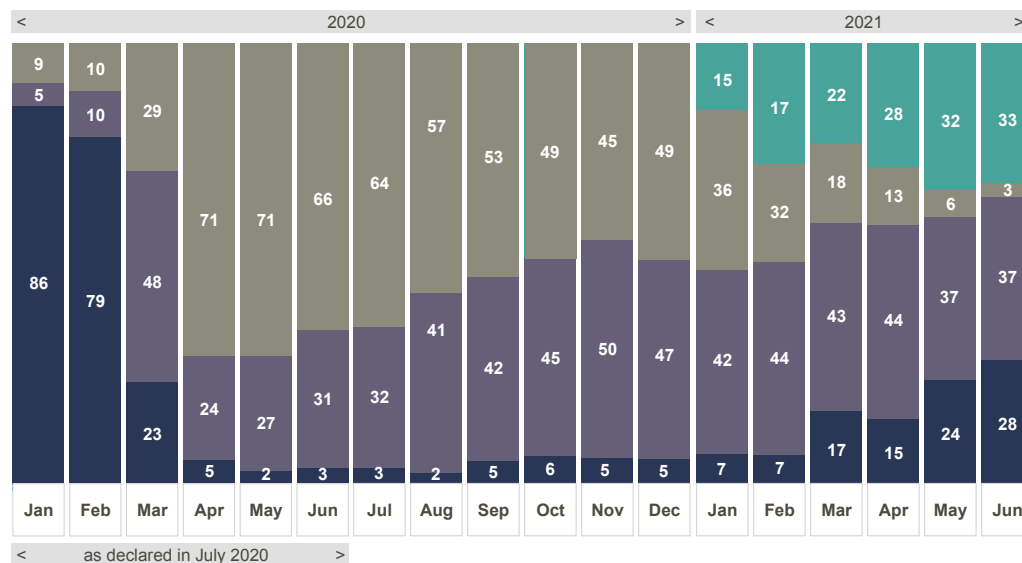
Operations - Reopening Exhibitions Central and South America



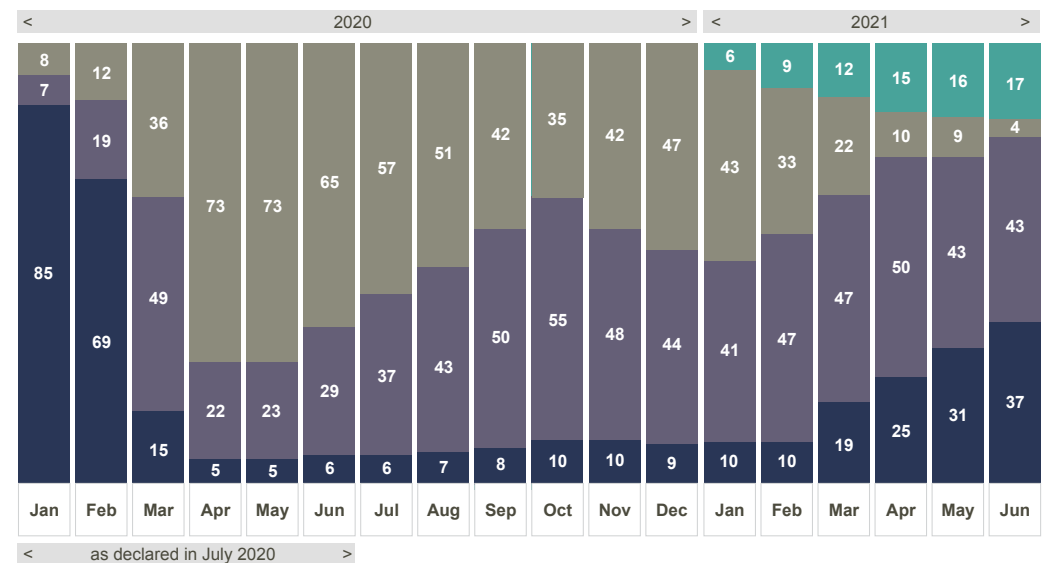
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



Central and South America

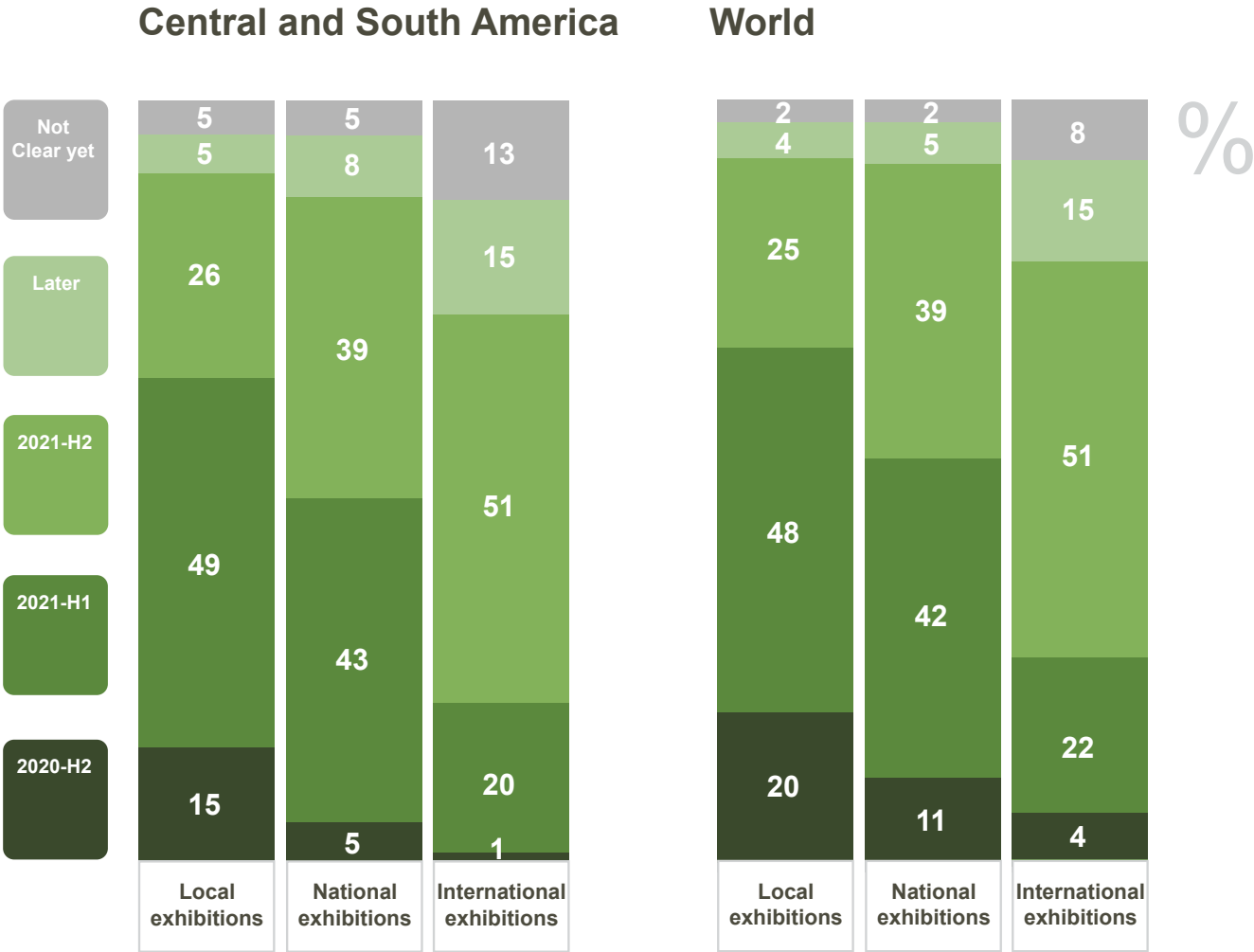


World



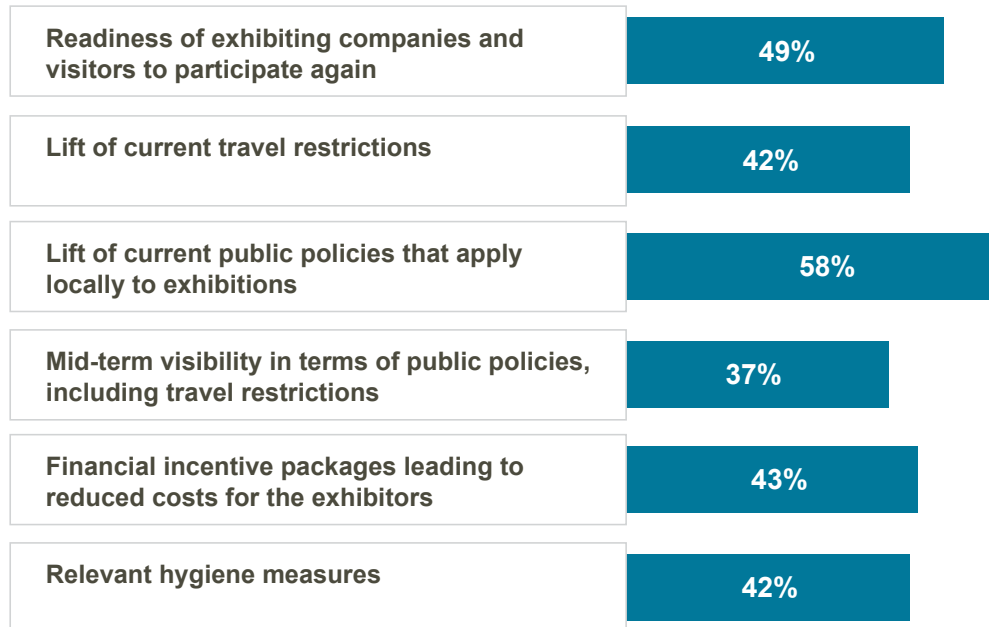


When do you believe exhibitions
will open again in your city?

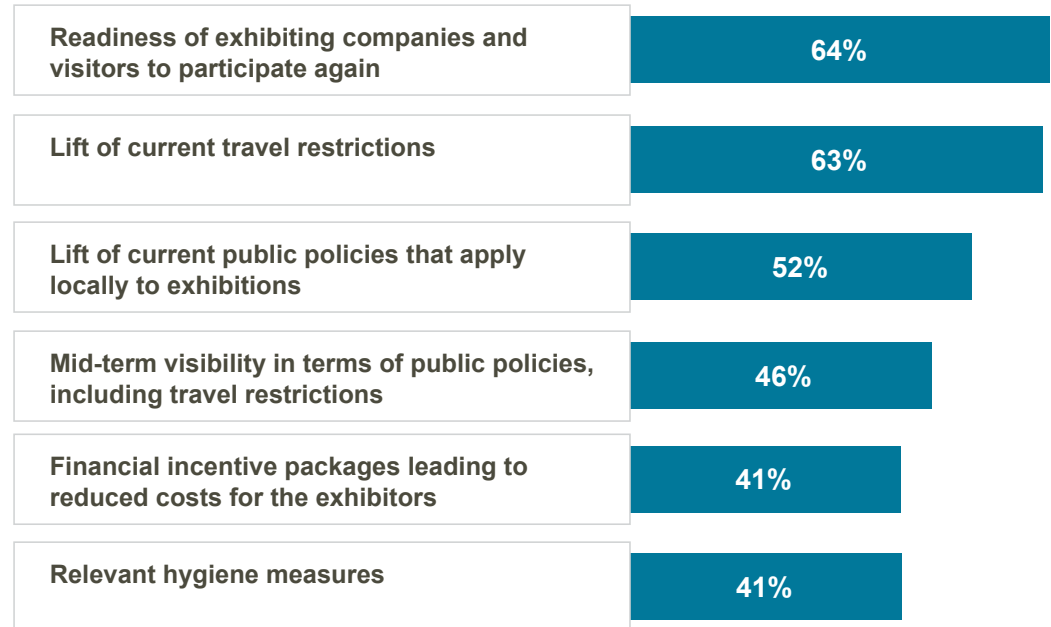


What do you believe would most help the “bounce back” of exhibitions?

Central and South America

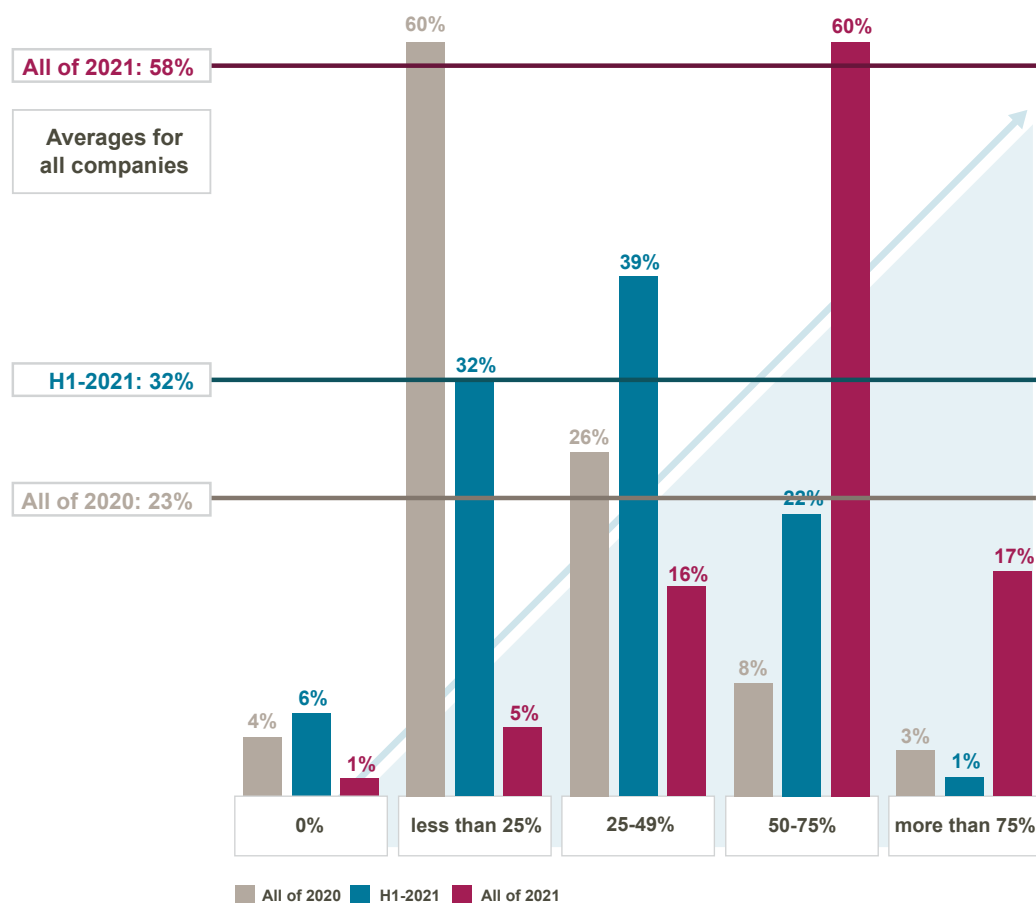


World

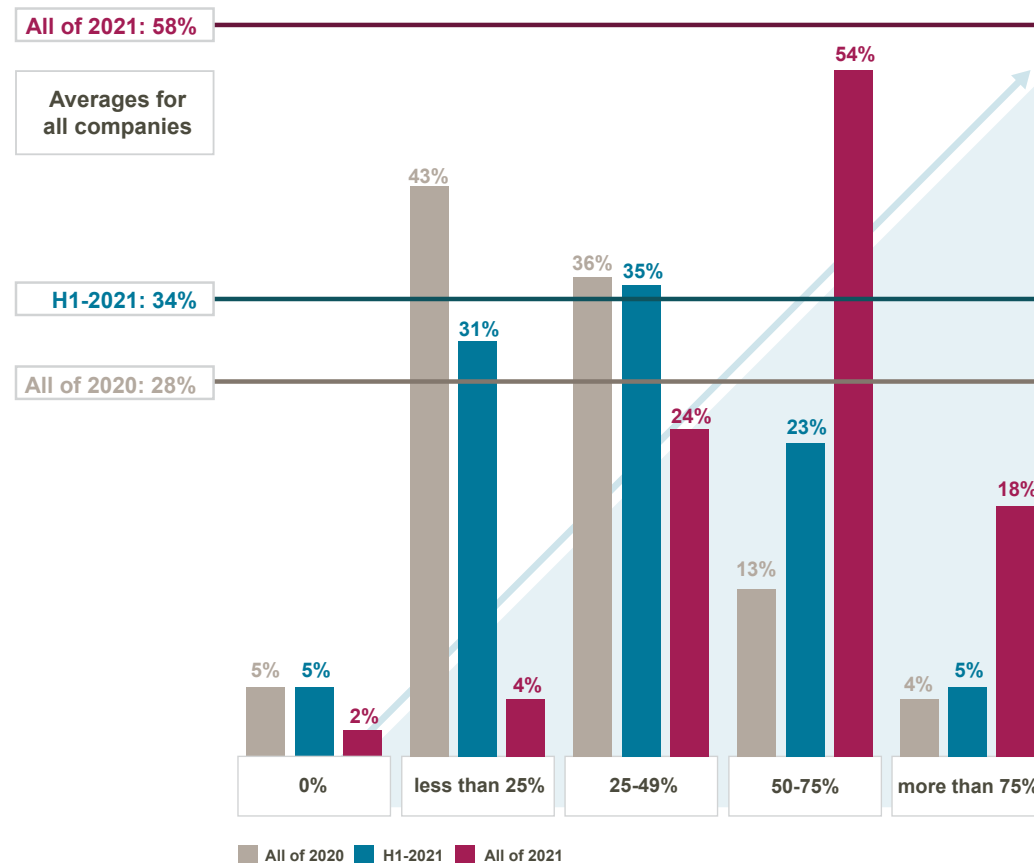


Revenue compared to last year (2019)

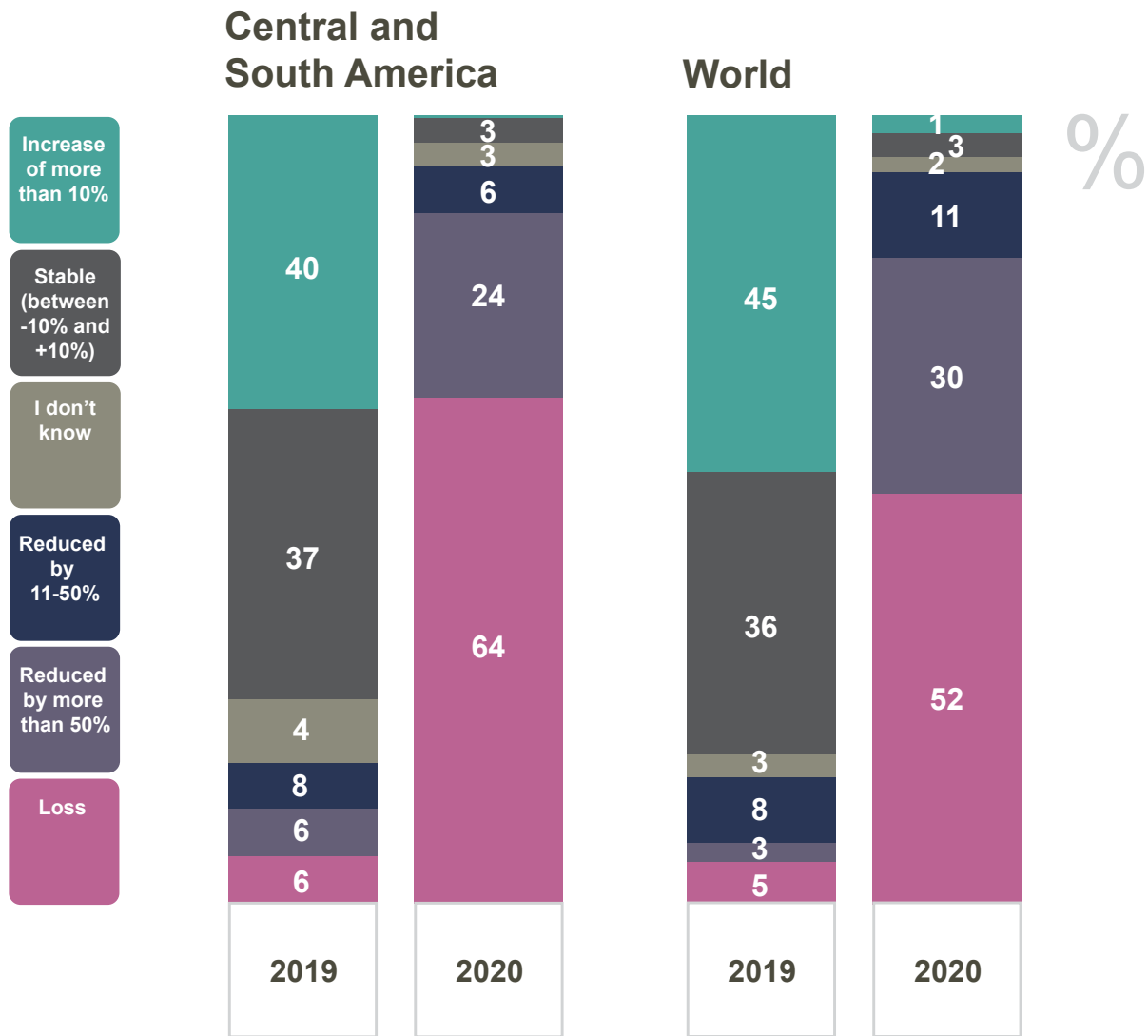
Central and South America



World



Operating Profits Central and South America

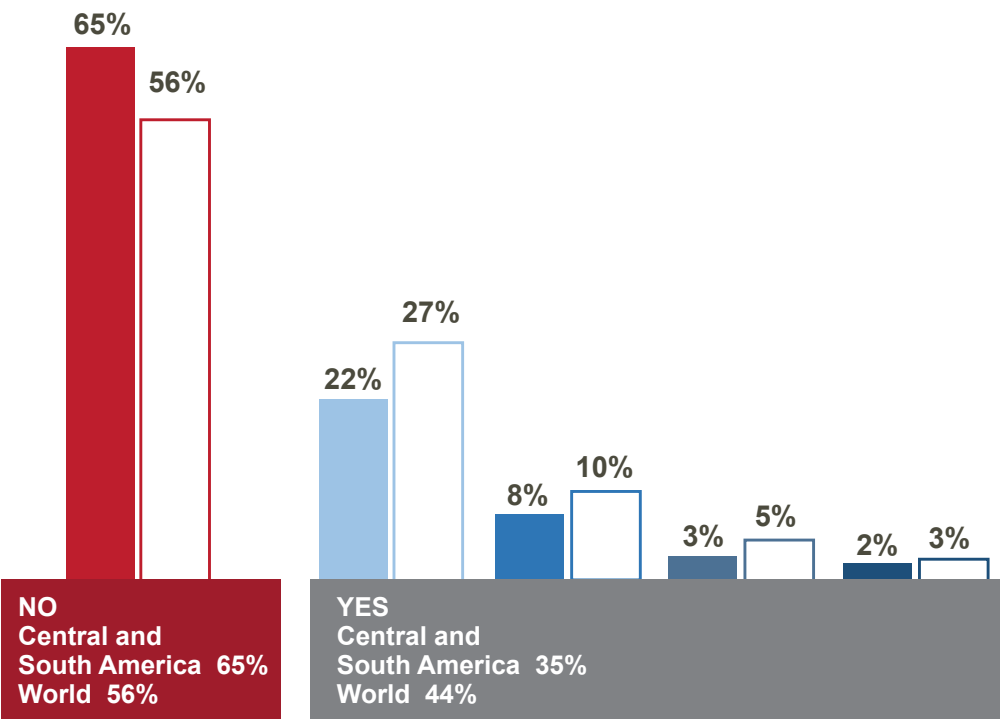


Public Financial Support Central and South America

Did your company benefit from public financial support?

Central and South America World

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

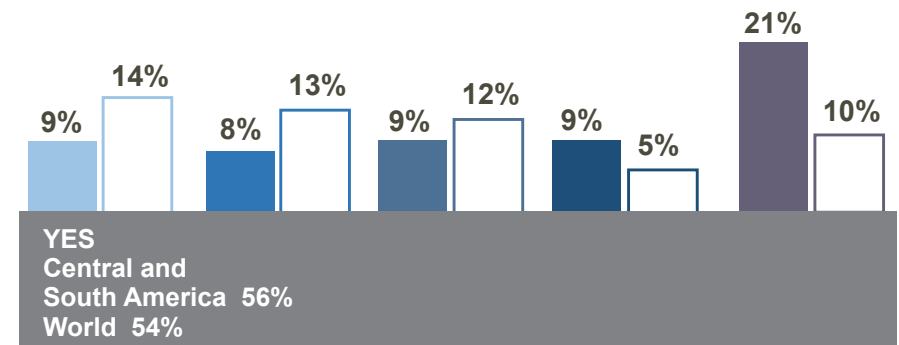
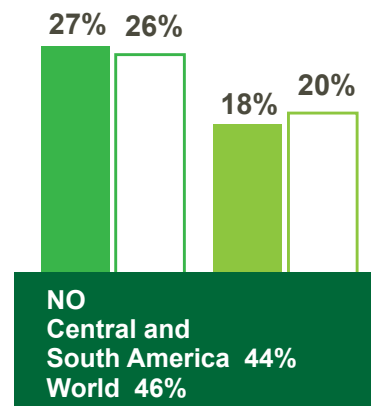


Have you had to reduce your workforce?

Central and South America





World

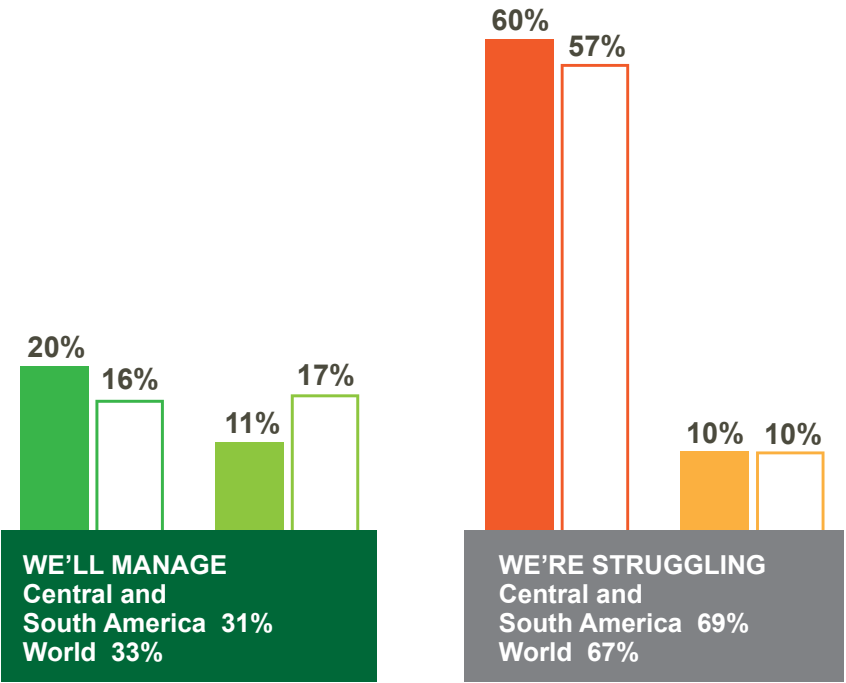
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum



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

Central and South America World

-  It's okay, we have extended our offering to other profitable work areas
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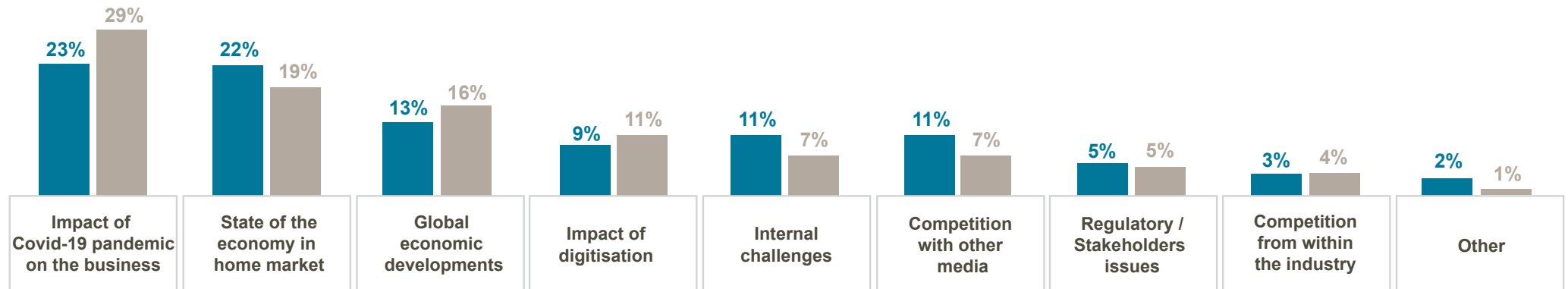
Most Important Business Issues - Format of Exhibitions - Central and South America



Most important business issues in the exhibition industry

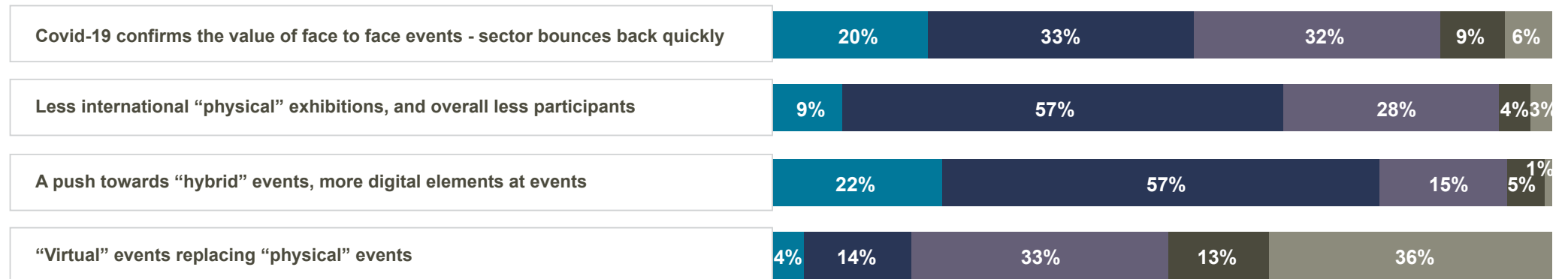
Central and South America

Global



Format of exhibitions in the coming years

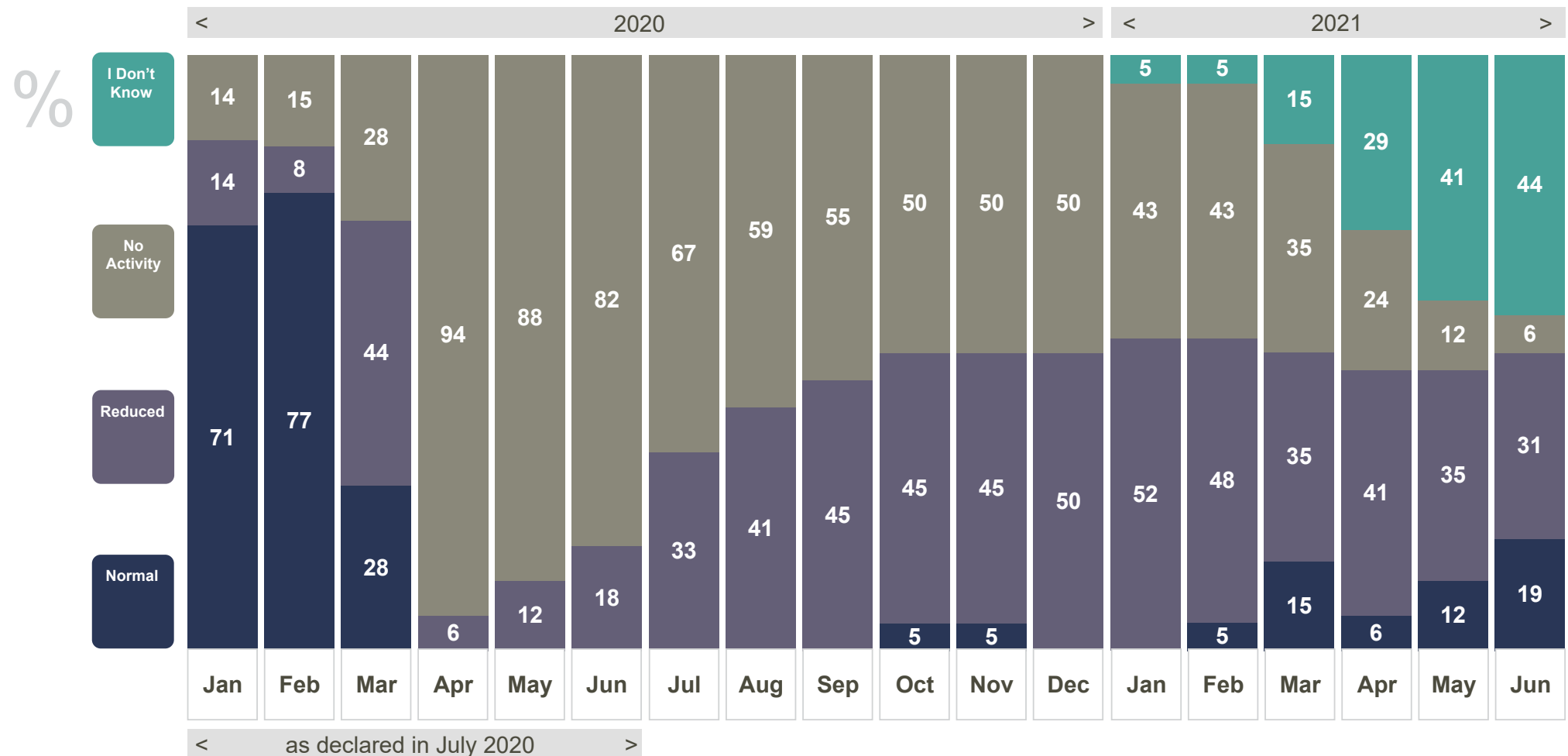
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Argentina



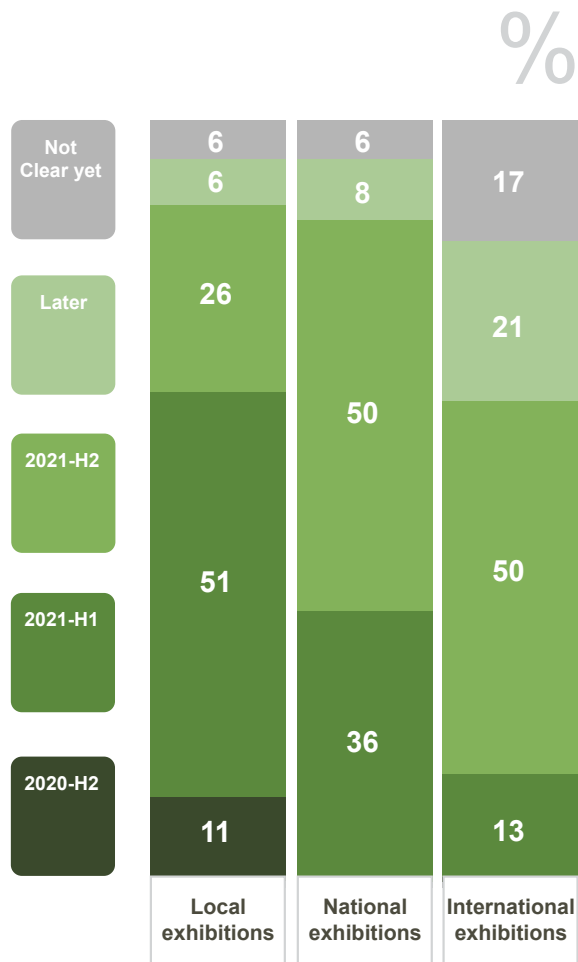
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



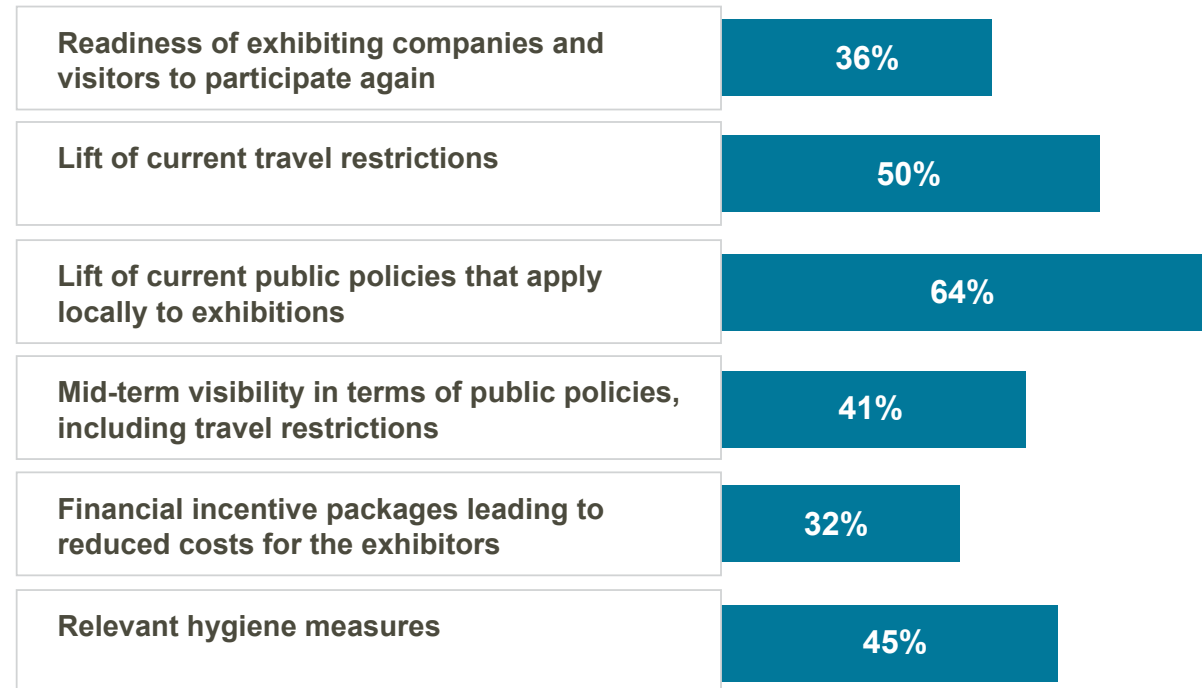
Detailed results for Argentina



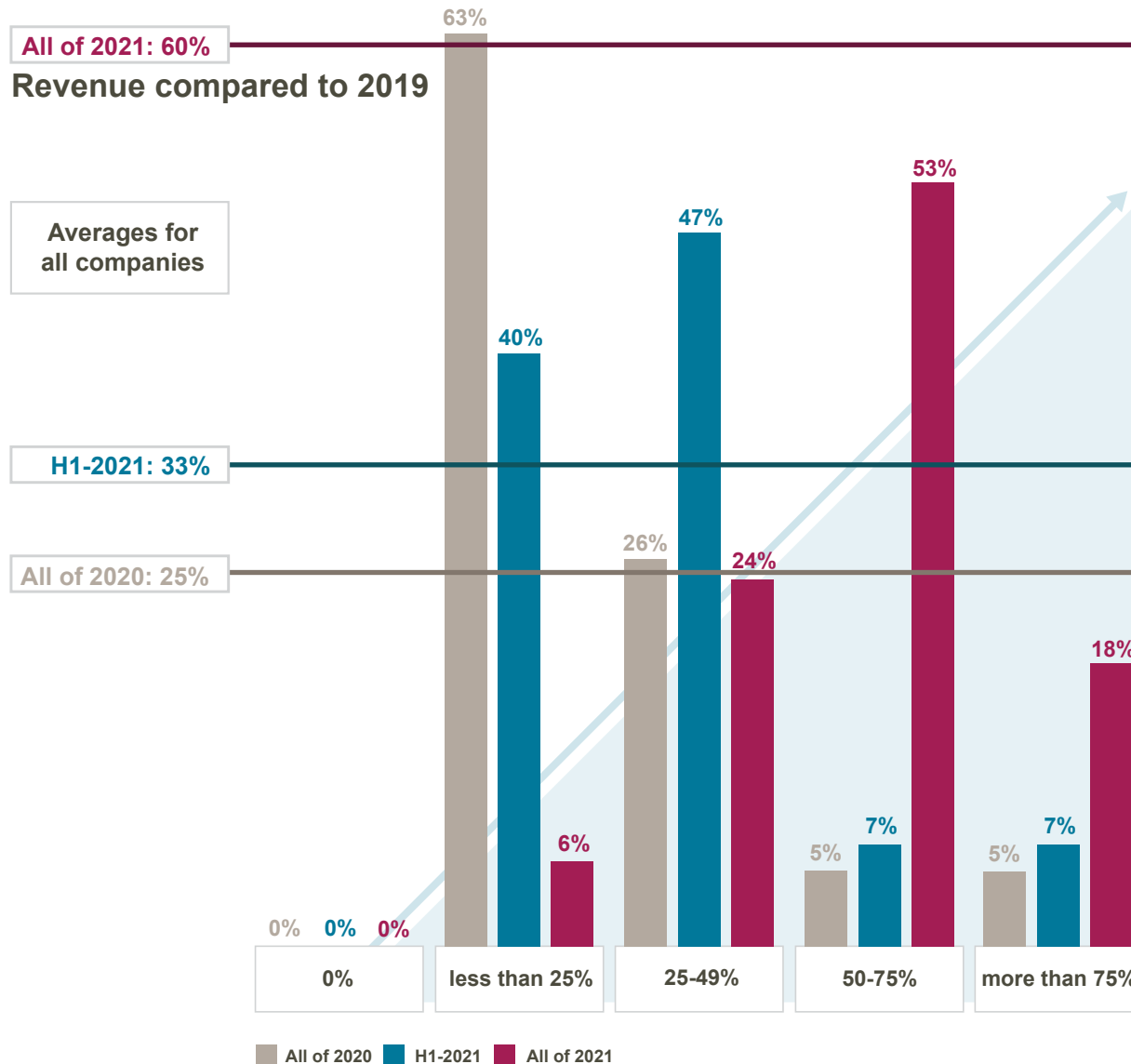
When do you believe exhibitions will open again in your city?



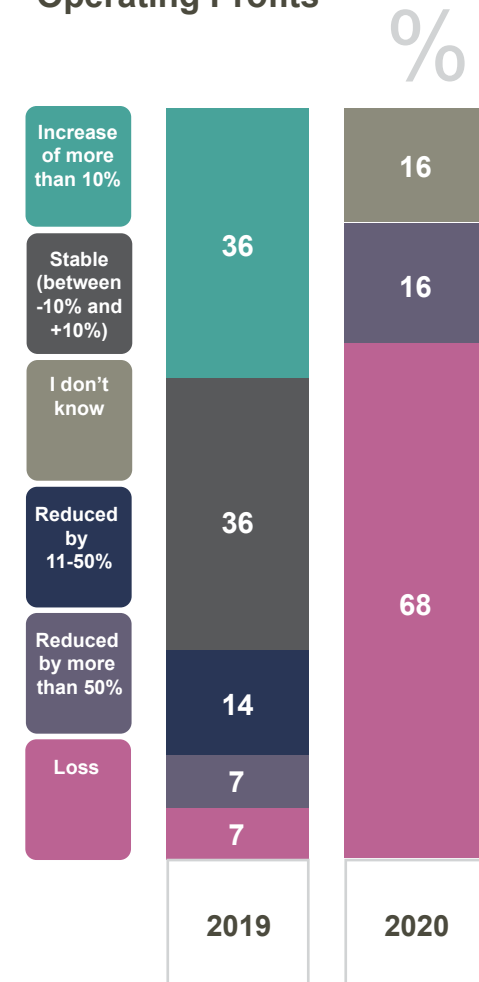
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for Argentina



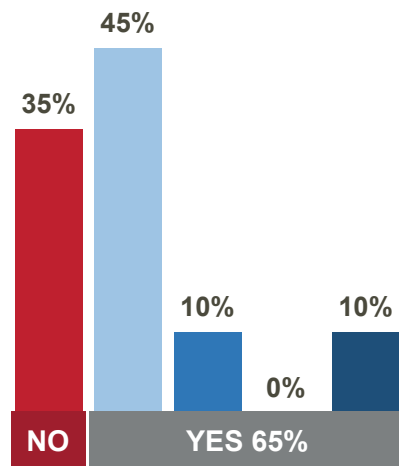
Operating Profits



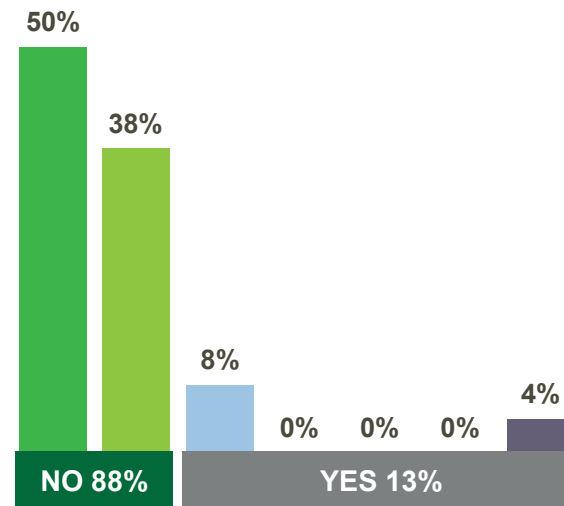
Detailed results for Argentina



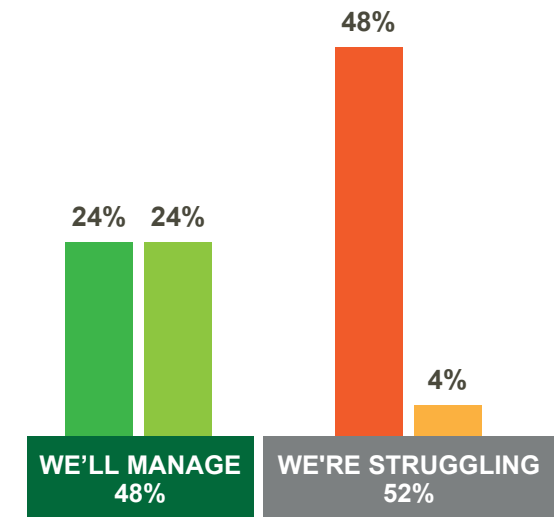
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



- No
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- Yes, for more than 50% of our 2019 overall costs

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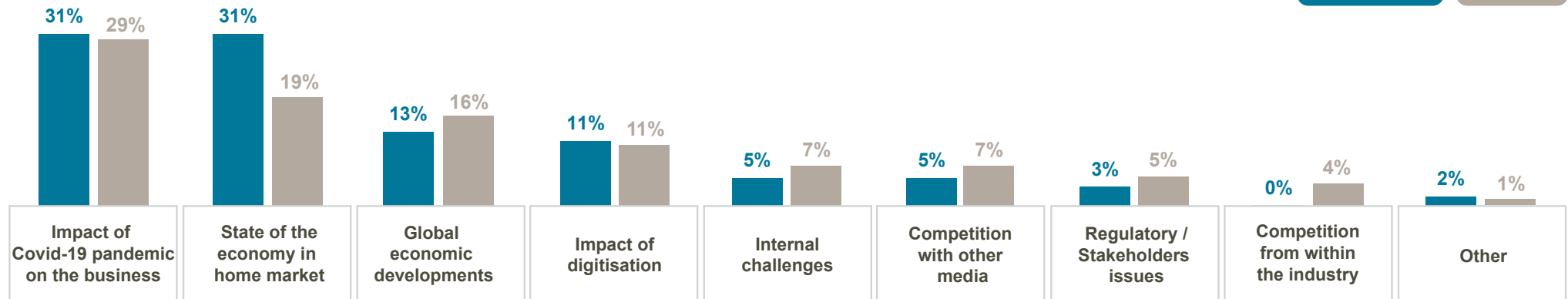
Detailed results for Argentina



Most important business issues in the exhibition industry

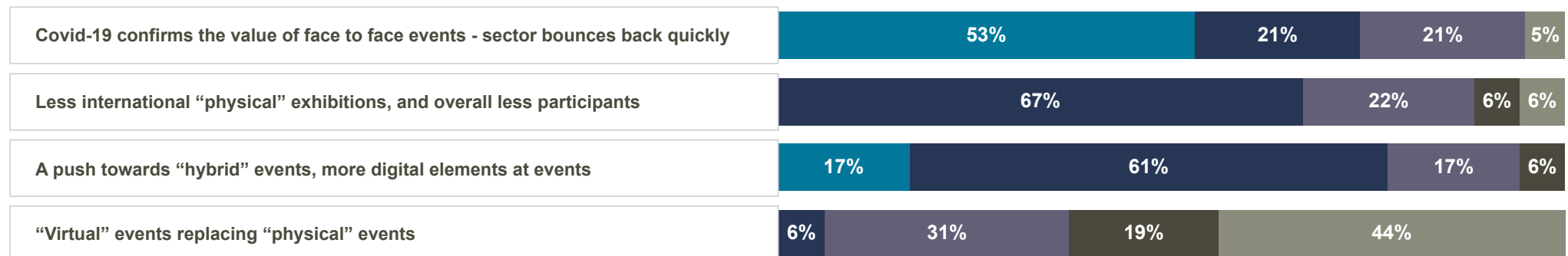
Argentina

Global



Format of exhibitions in the coming years

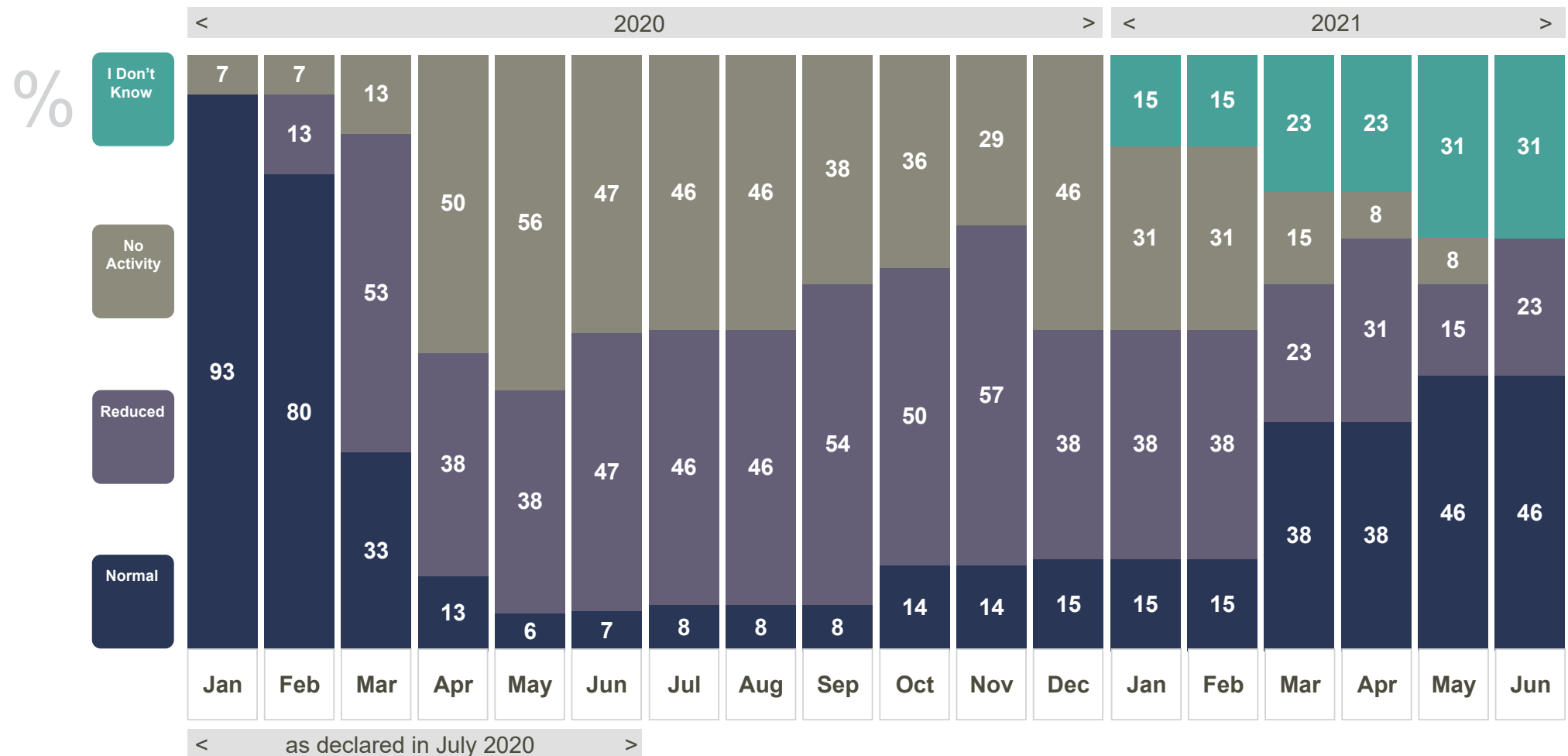
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Brazil



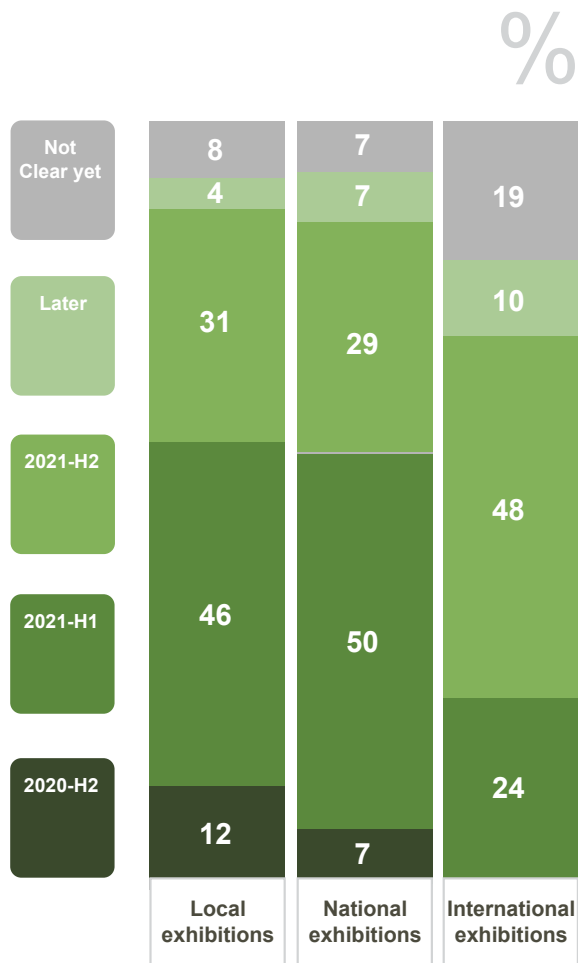
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



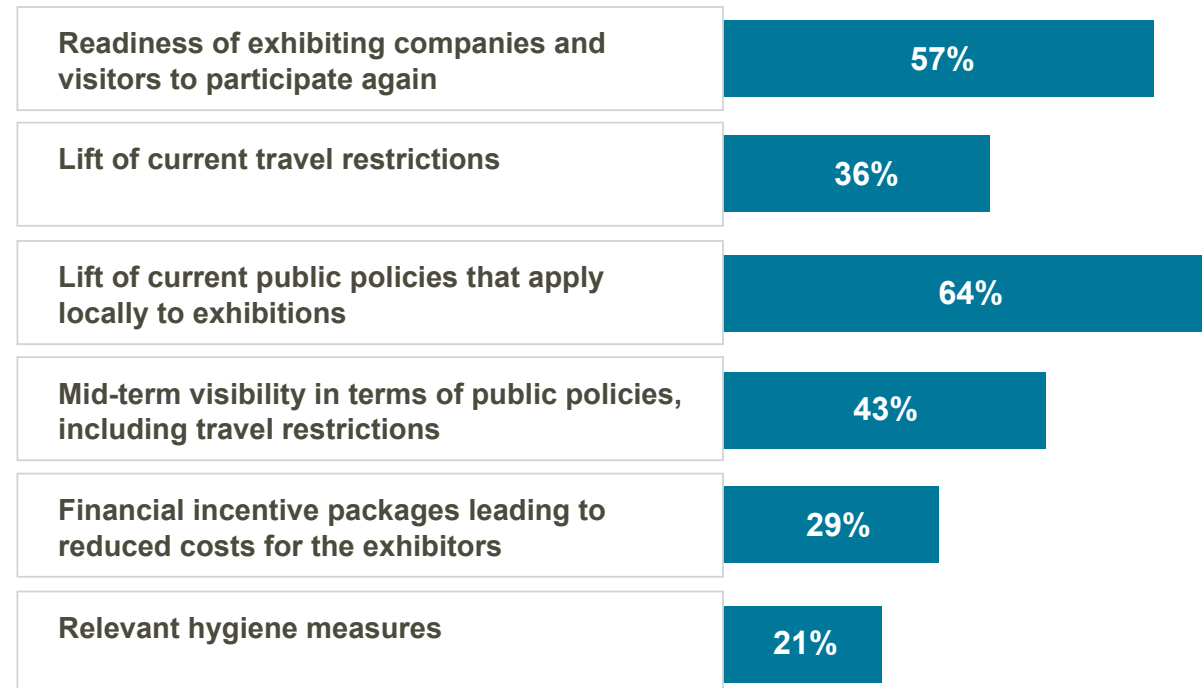
Detailed results for Brazil



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



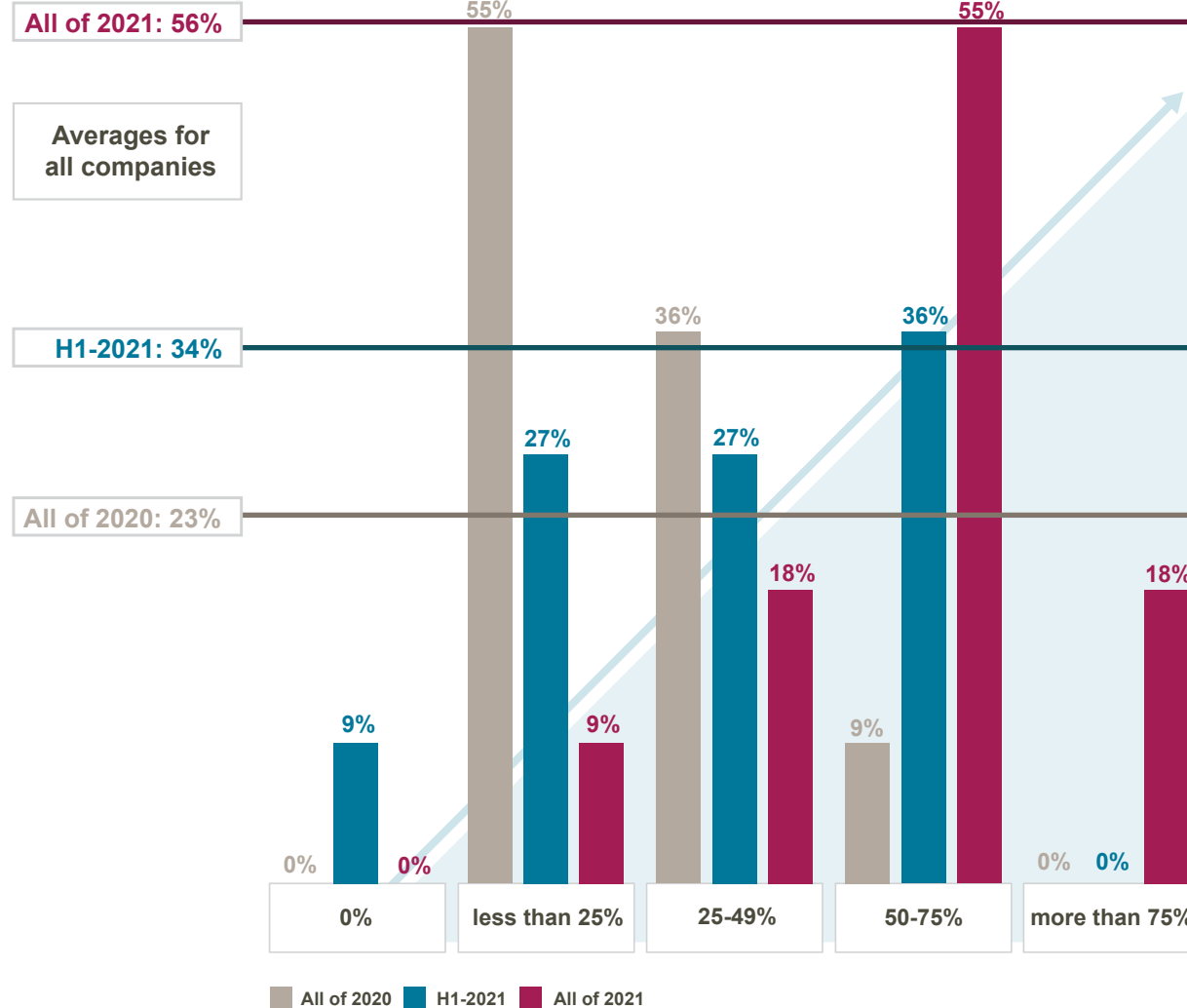
What do you believe would most help the “bounce back” of exhibitions?



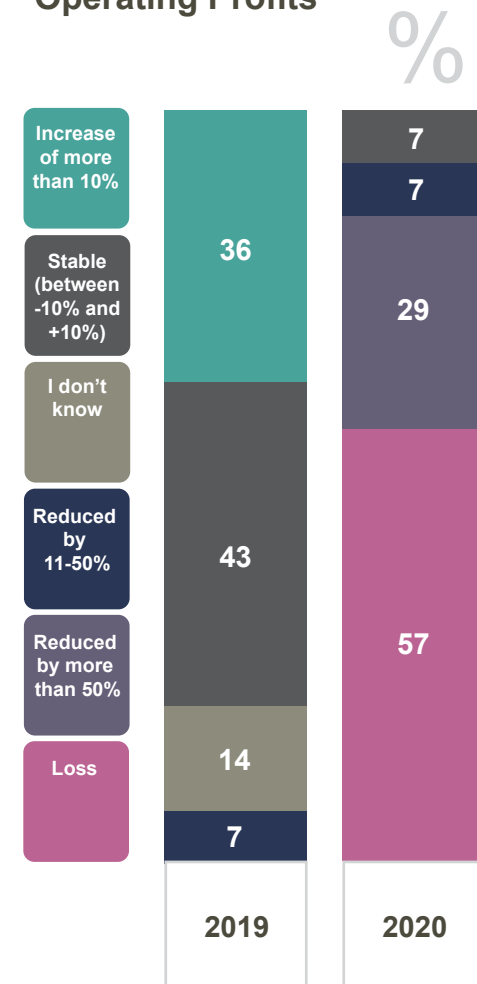
Detailed results for Brazil



Revenue compared to 2019



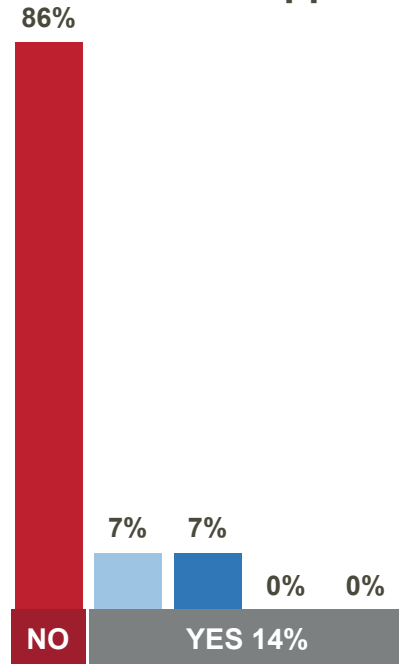
Operating Profits



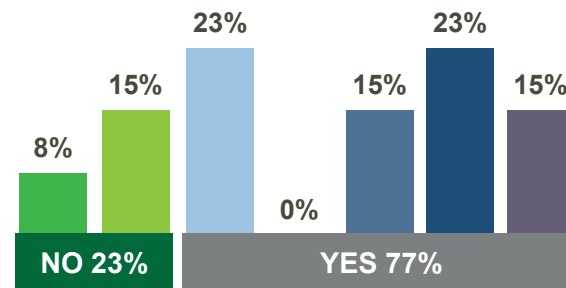
Detailed results for Brazil



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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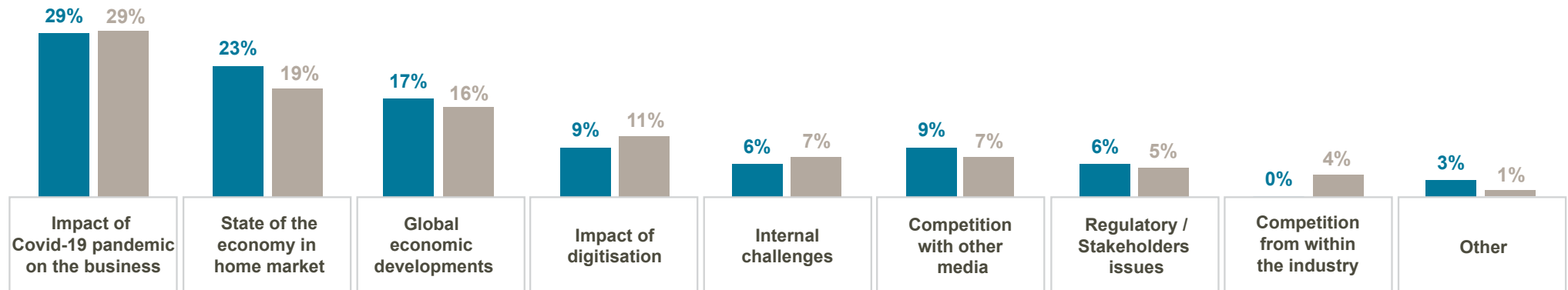
Detailed results for Brazil



Most important business issues in the exhibition industry

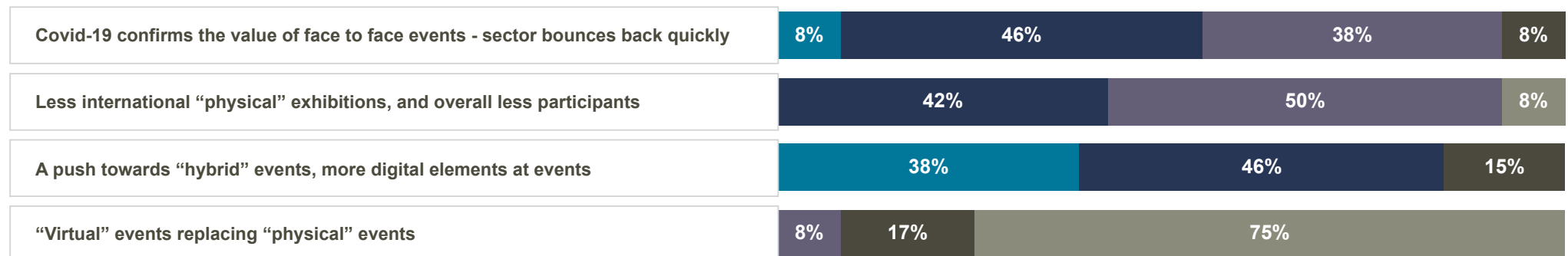
Brazil

Global



Format of exhibitions in the coming years

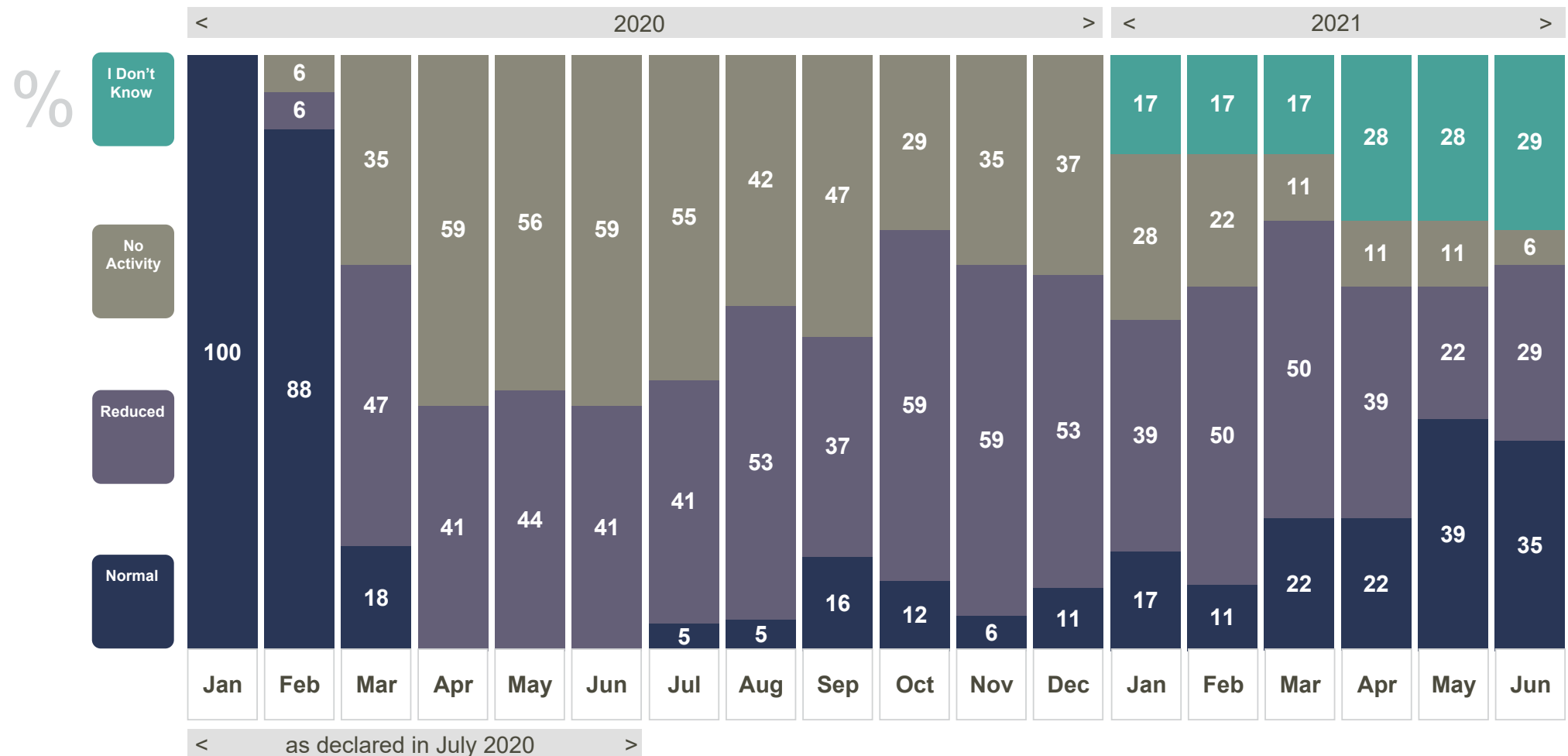
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Colombia

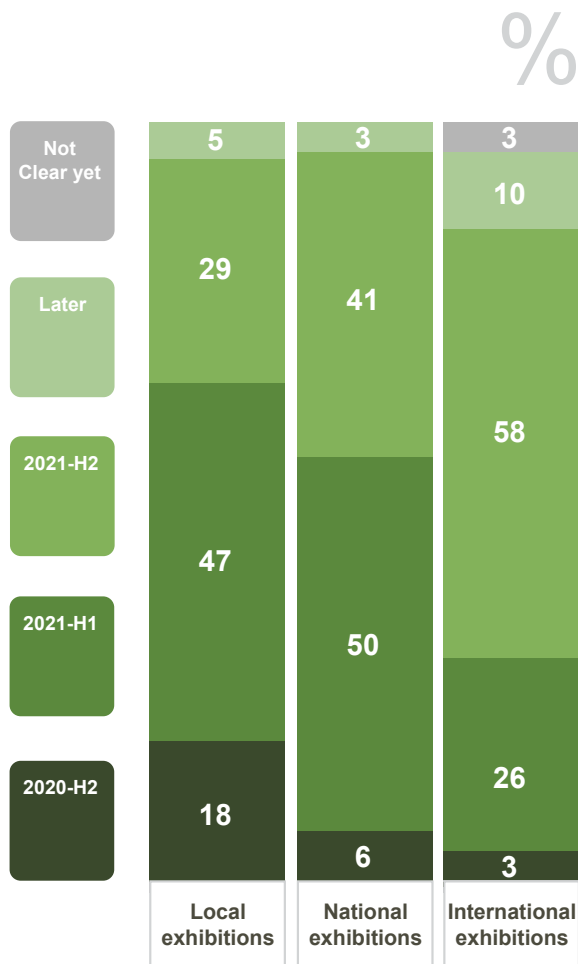


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

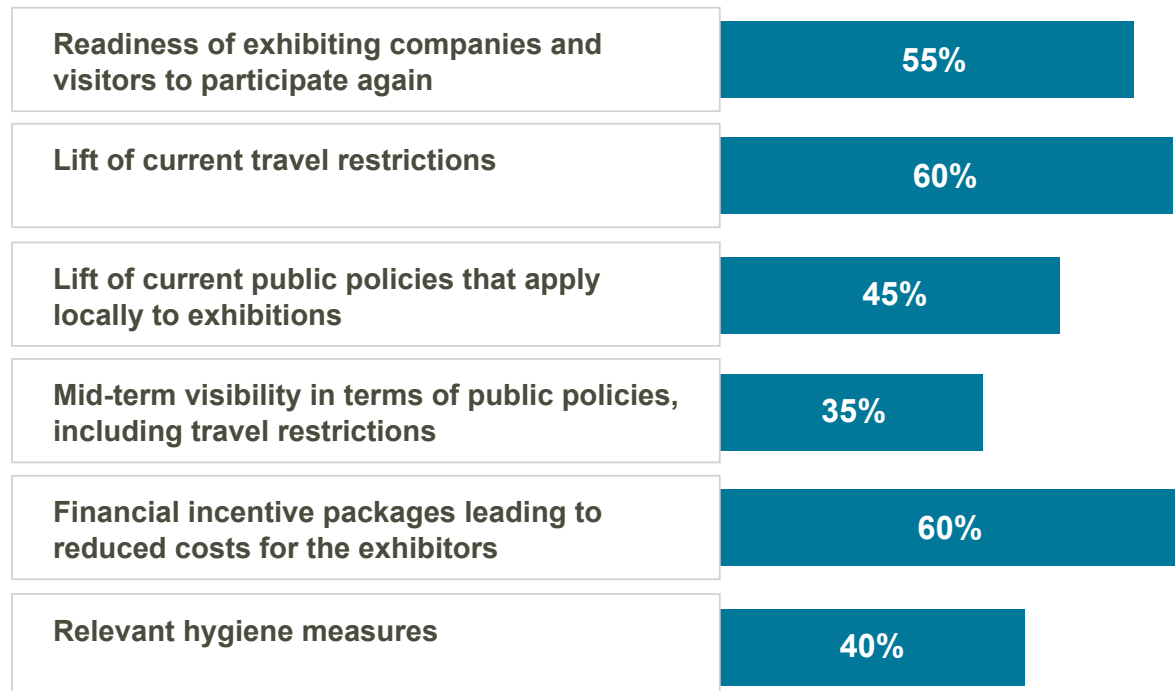




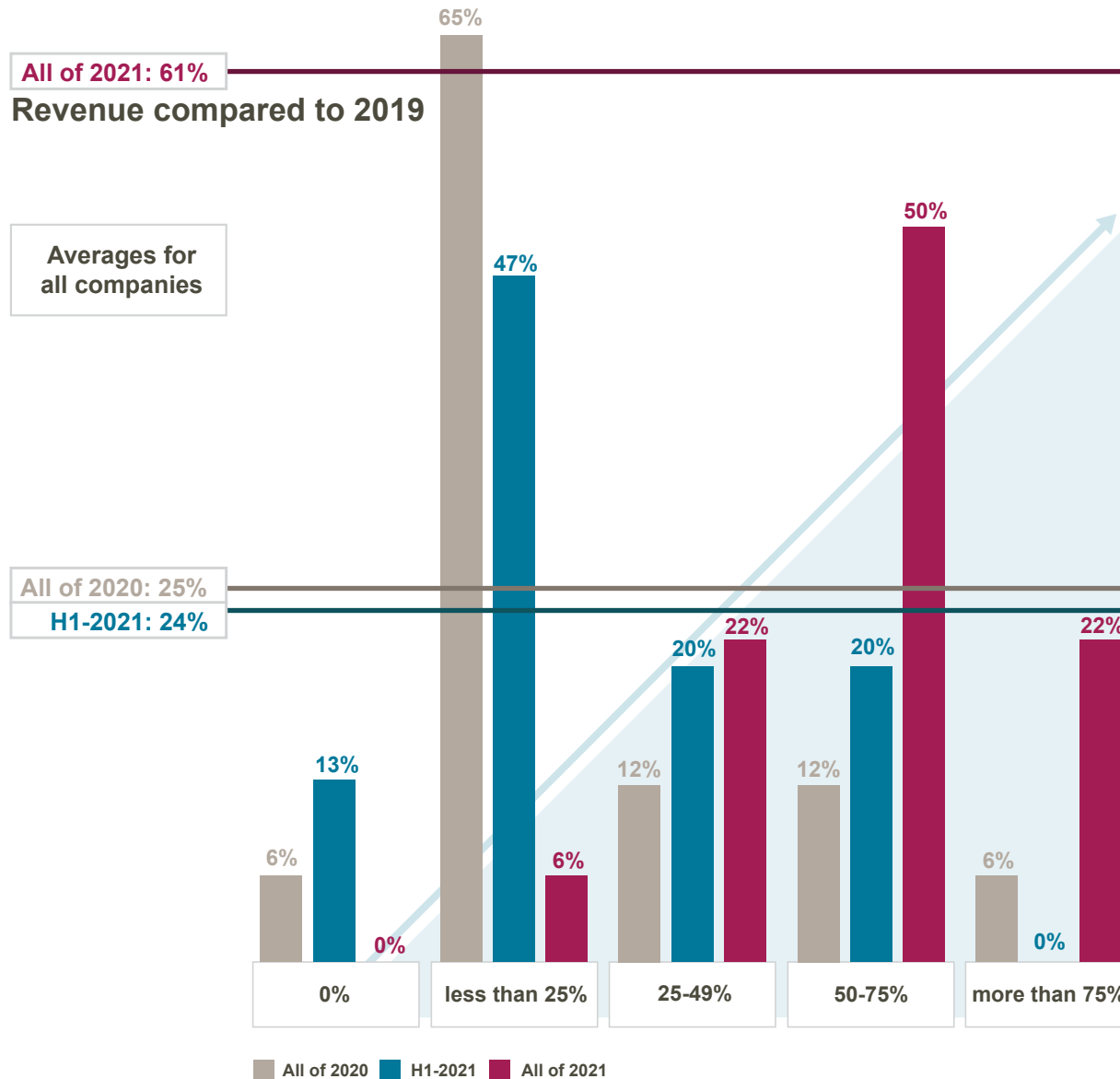
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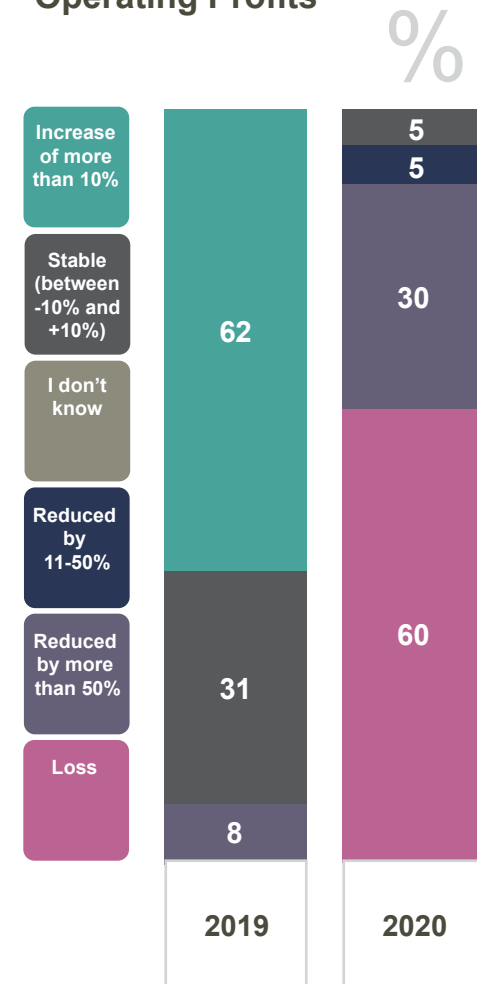
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for Colombia



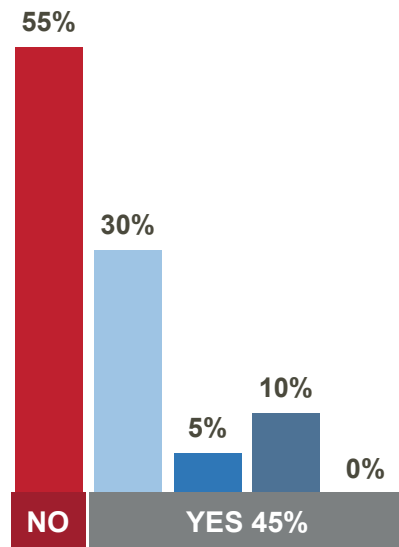
Operating Profits



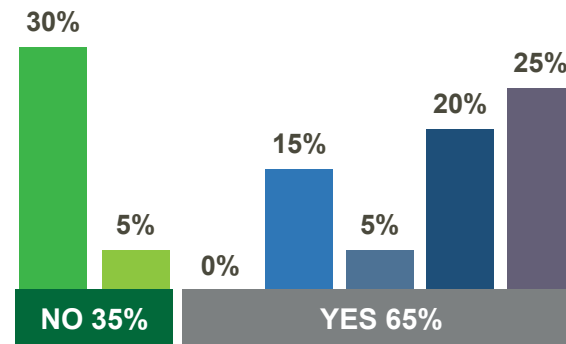
Detailed results for Colombia



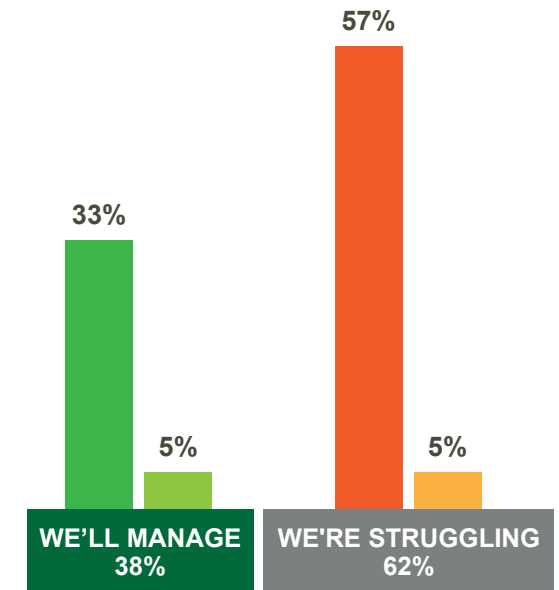
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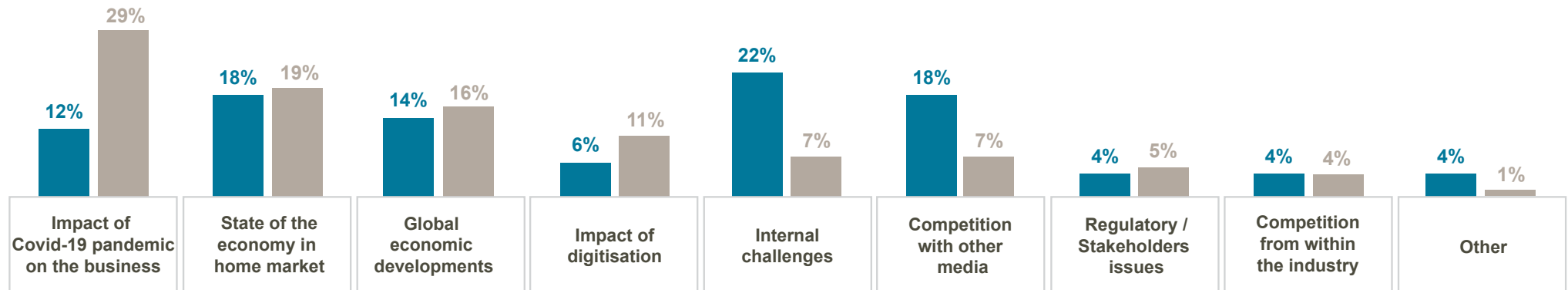
Detailed results for Colombia



Most important business issues in the exhibition industry

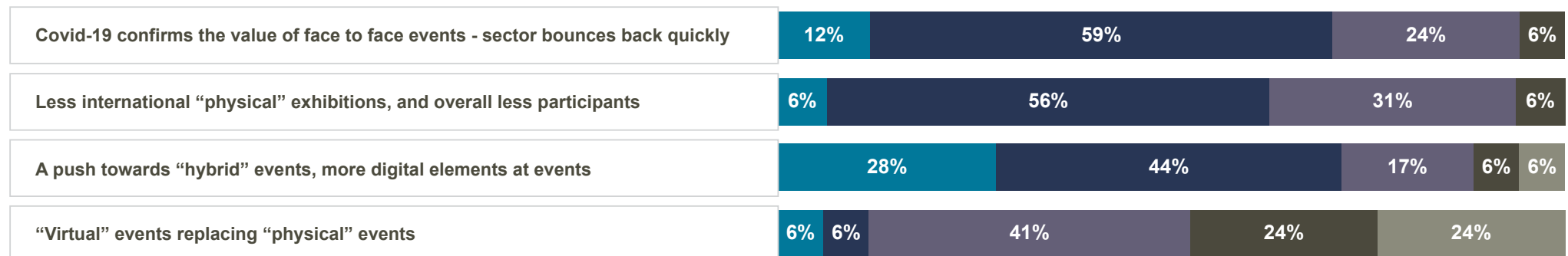
Colombia

Global



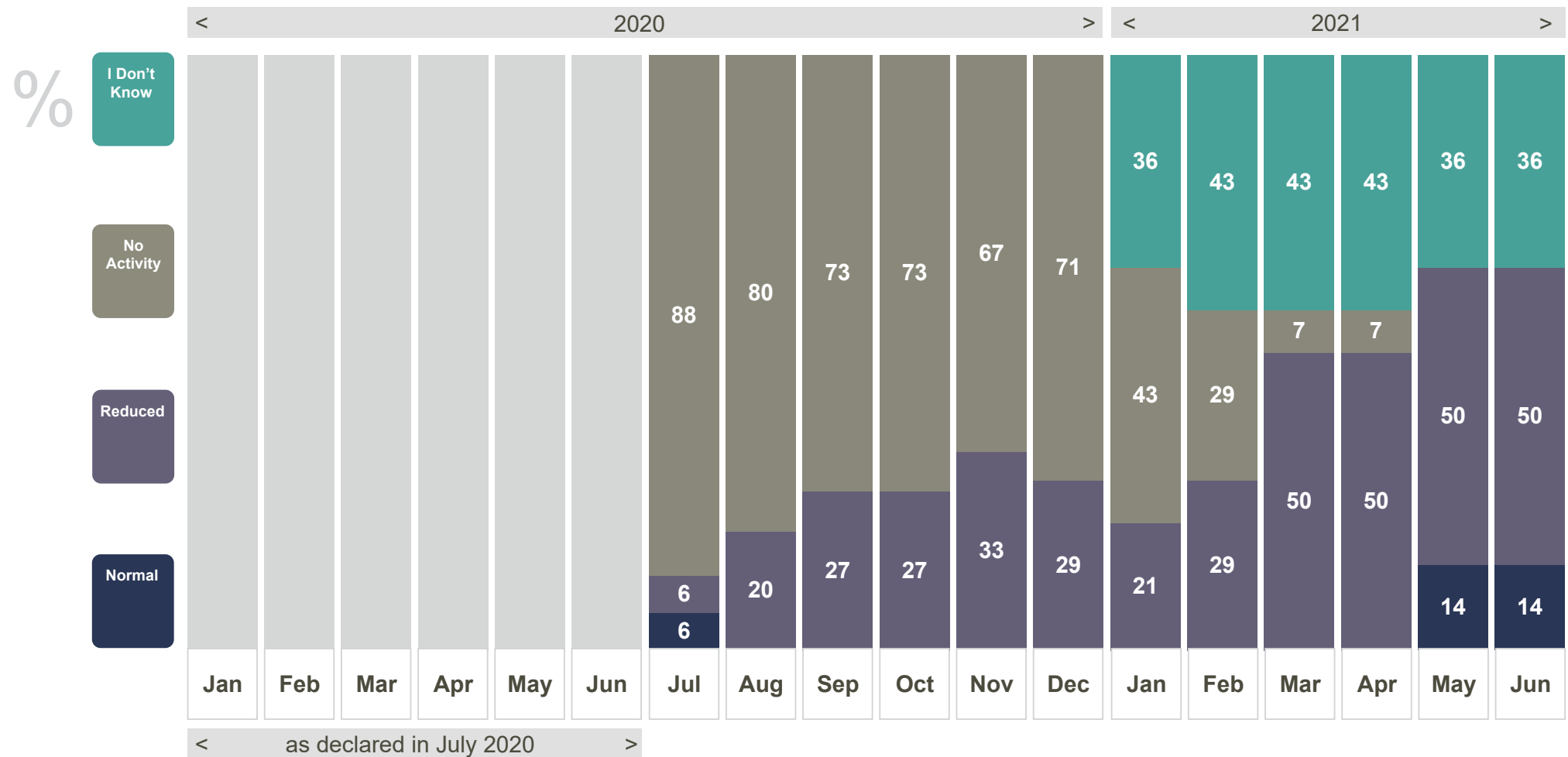
Format of exhibitions in the coming years

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



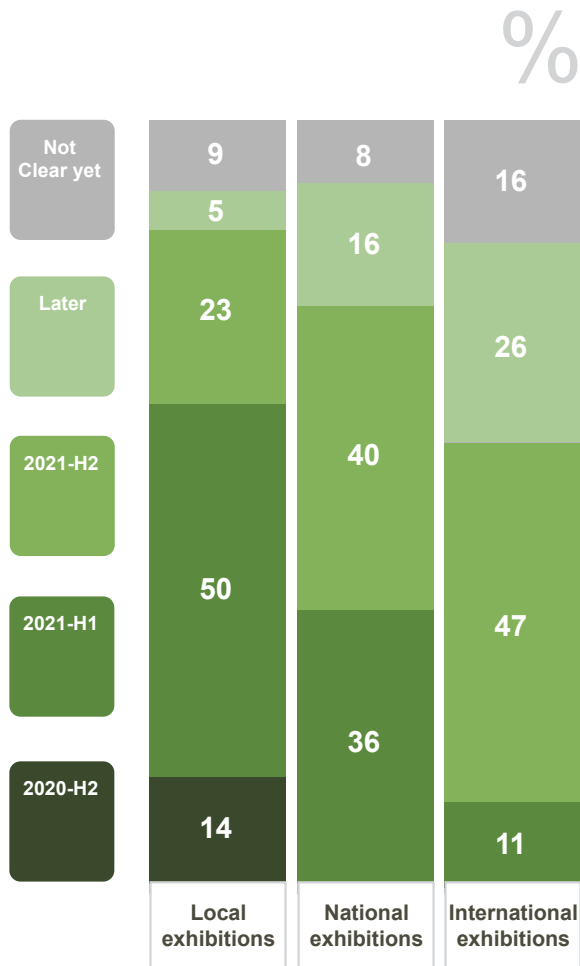


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

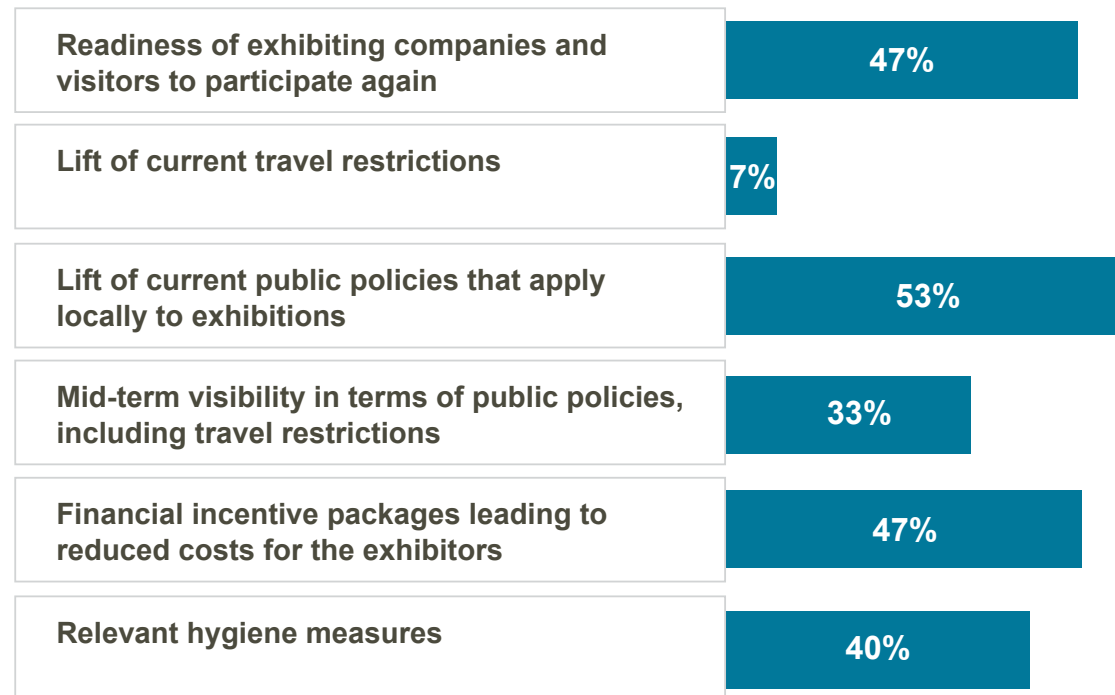




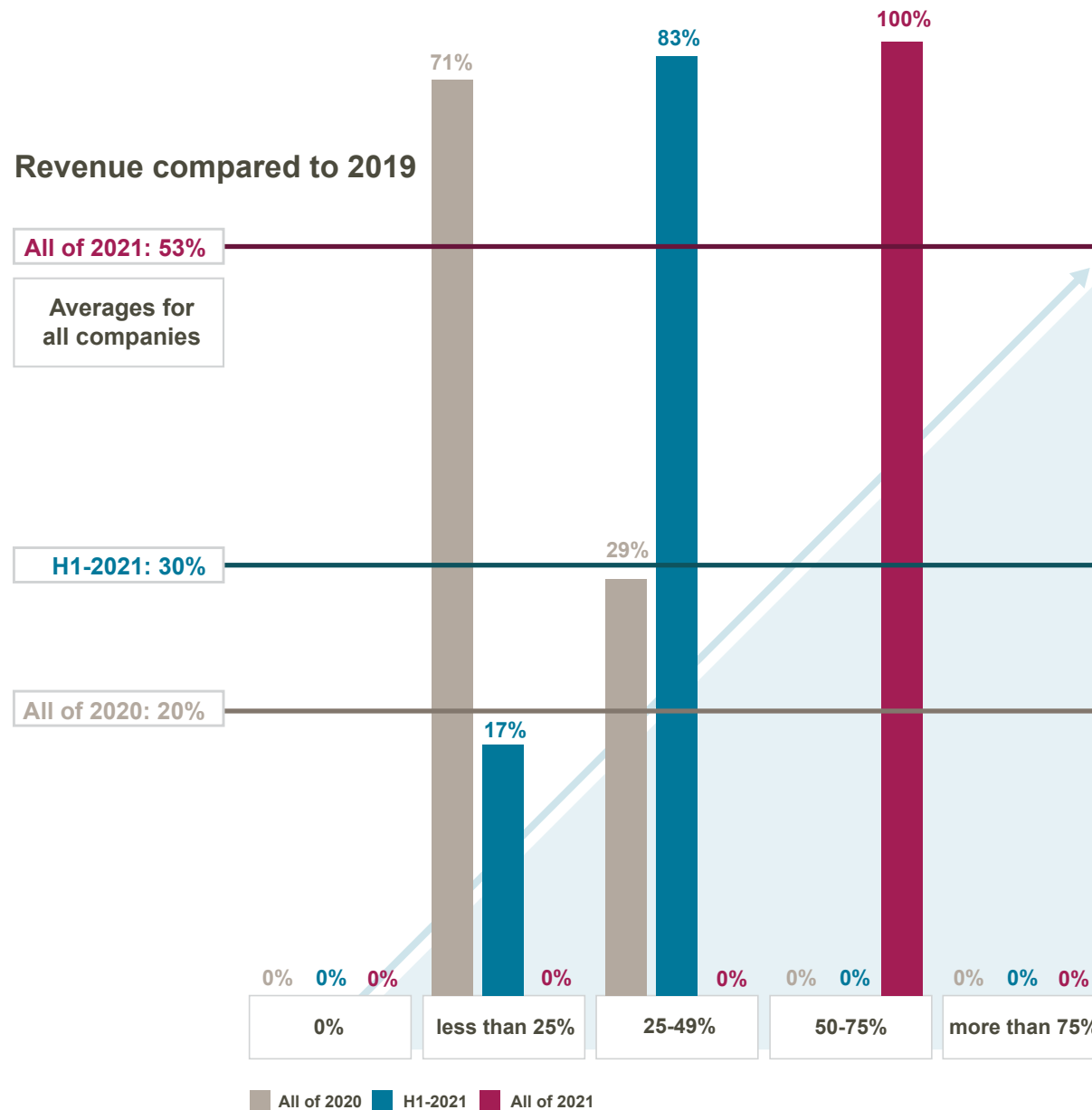
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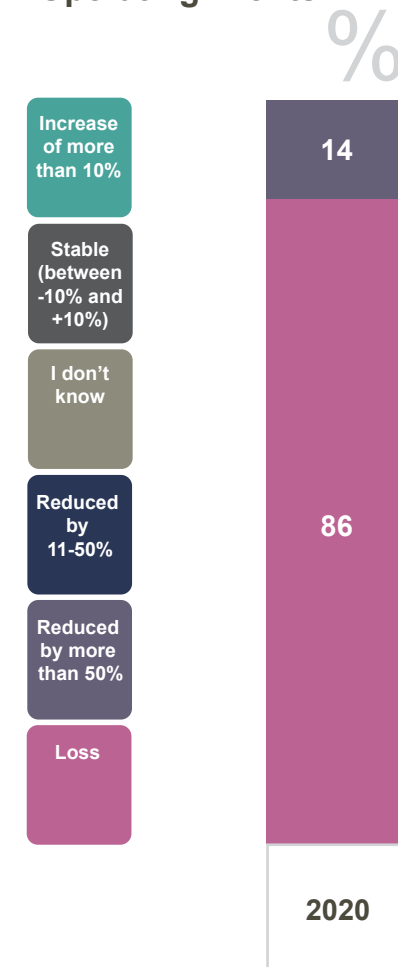
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for Peru



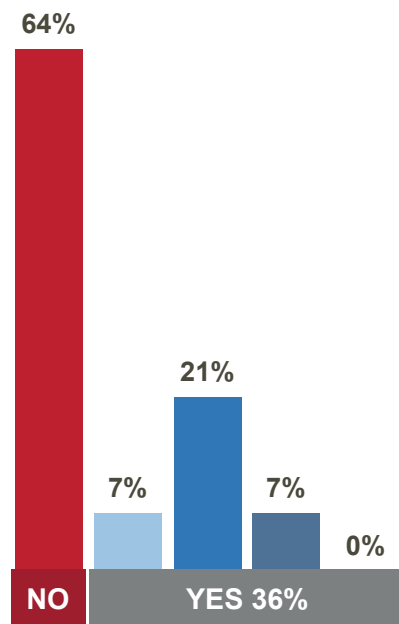
Operating Profits



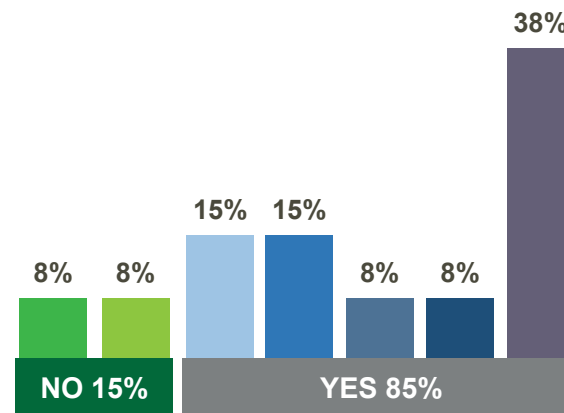
Detailed results for Peru



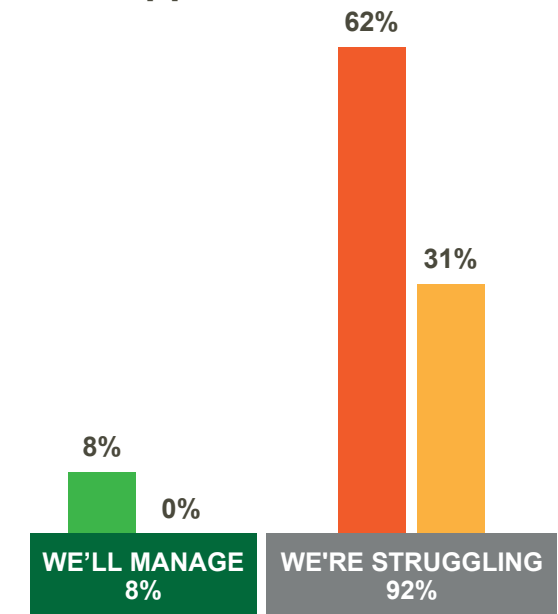
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Have you had to reduce your workforce?



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- No
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- Yes, for more than 50% of our 2019 overall costs

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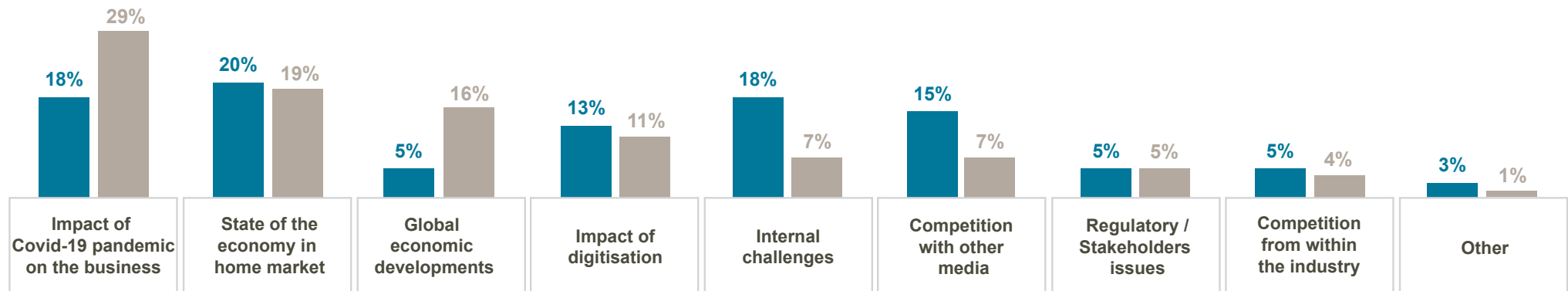
Detailed results for Peru



Most important business issues in the exhibition industry

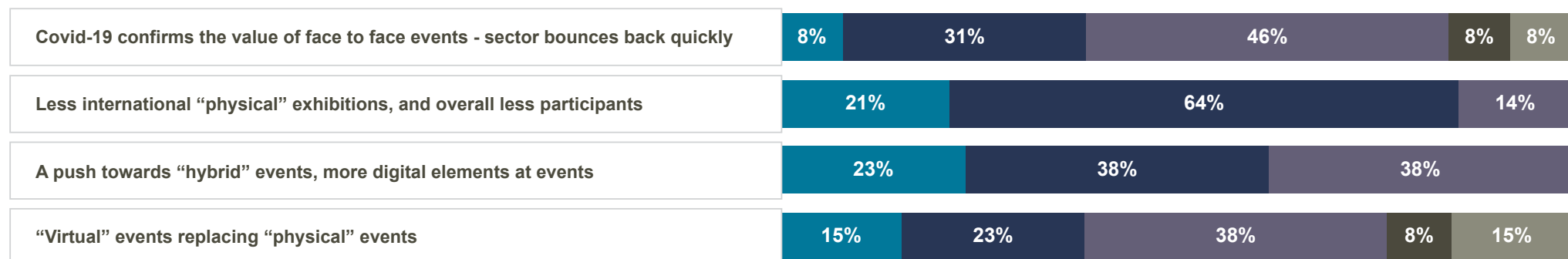
Peru

Global



Format of exhibitions in the coming years

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





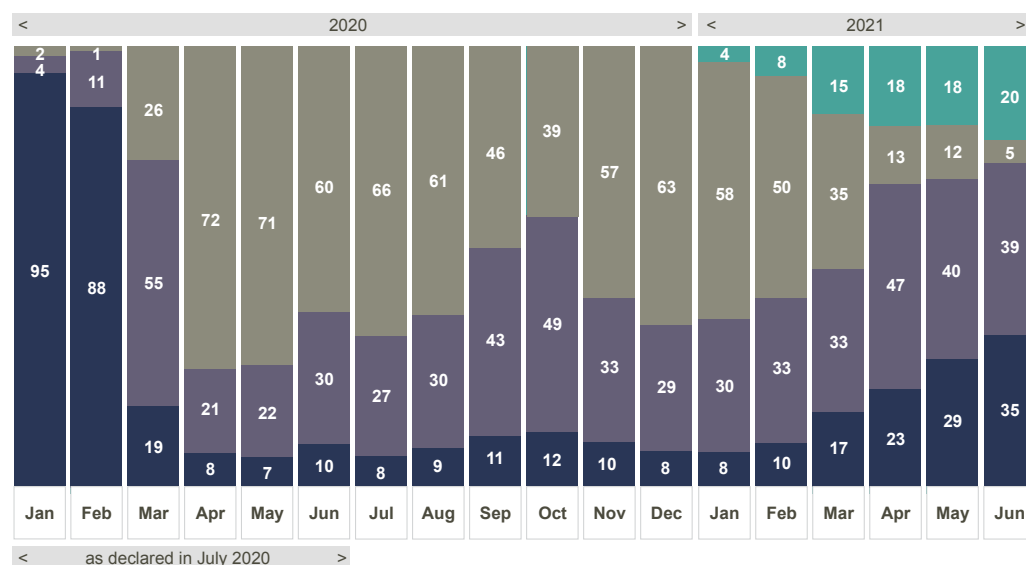
Europe

Operations - Reopening Exhibitions Europe

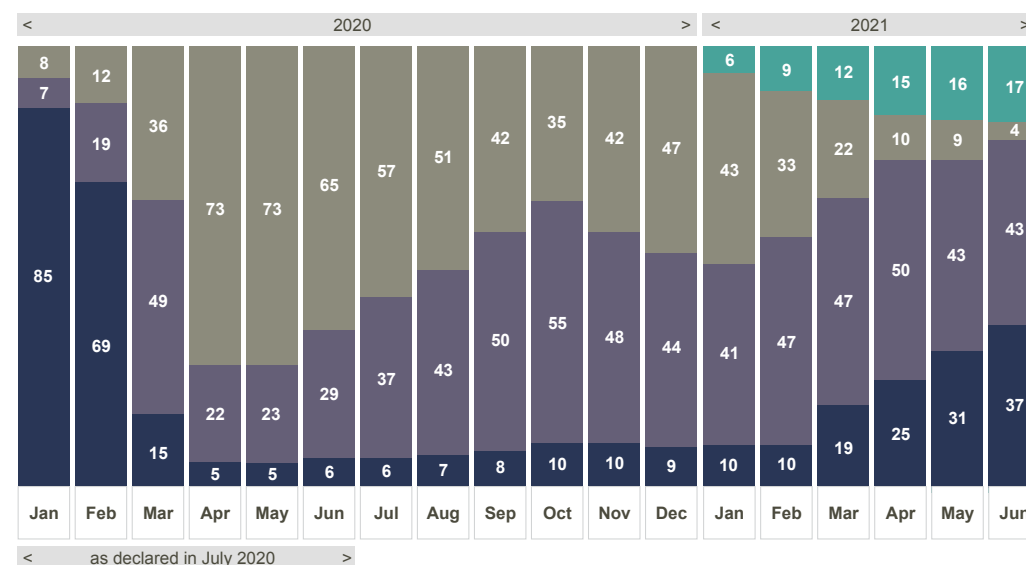
Situation of industry operations in 2020 and current predictions for the 1st half of 2021

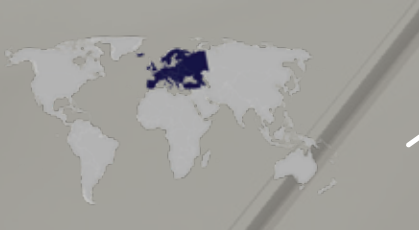


Europe

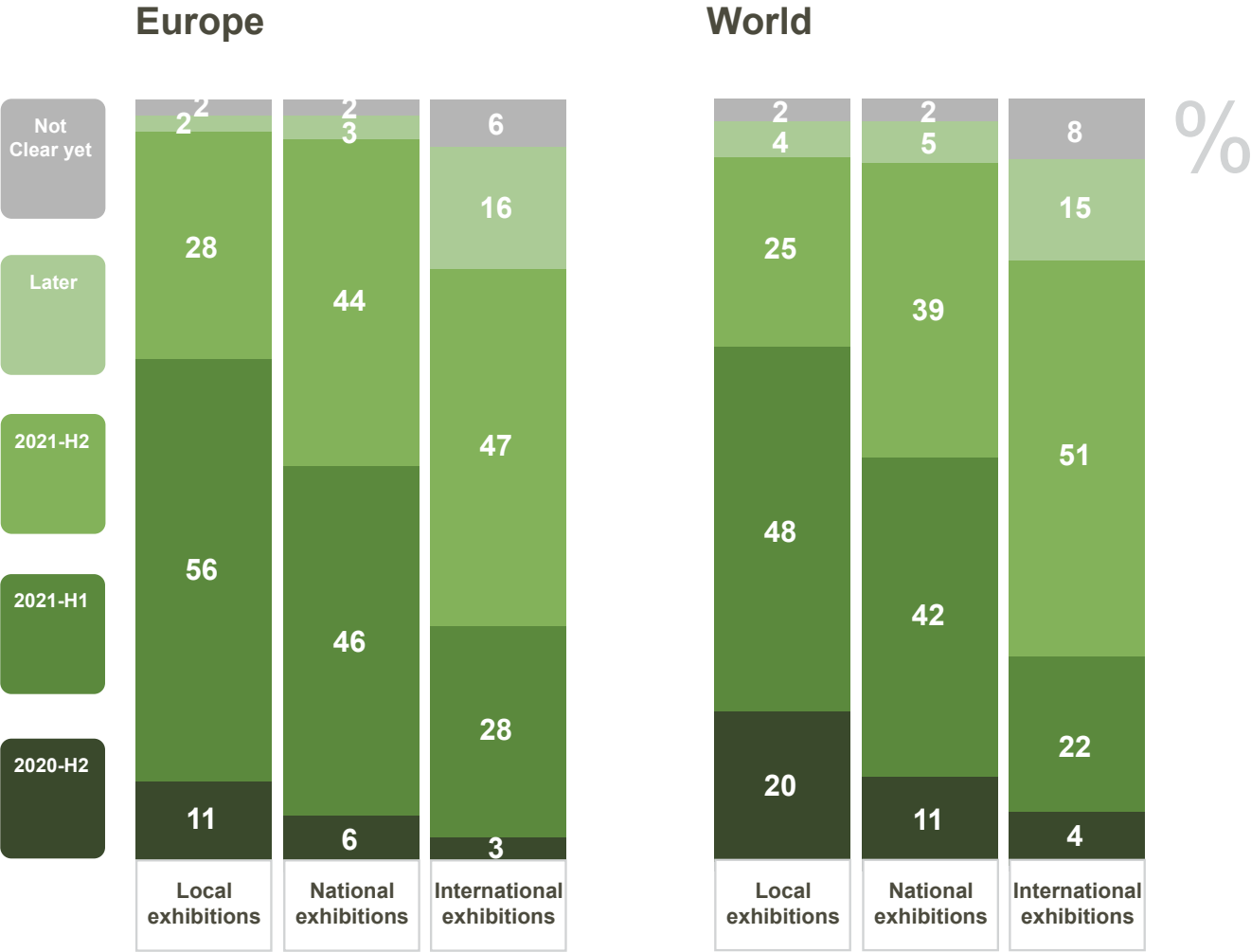


World





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

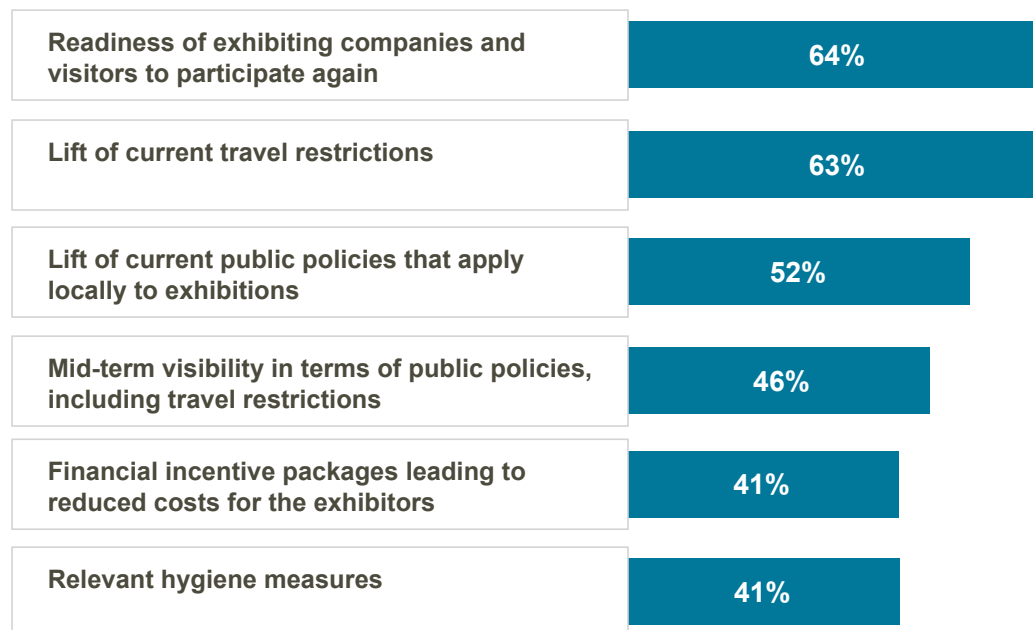


What do you believe would most help the “bounce back” of exhibitions?

Europe

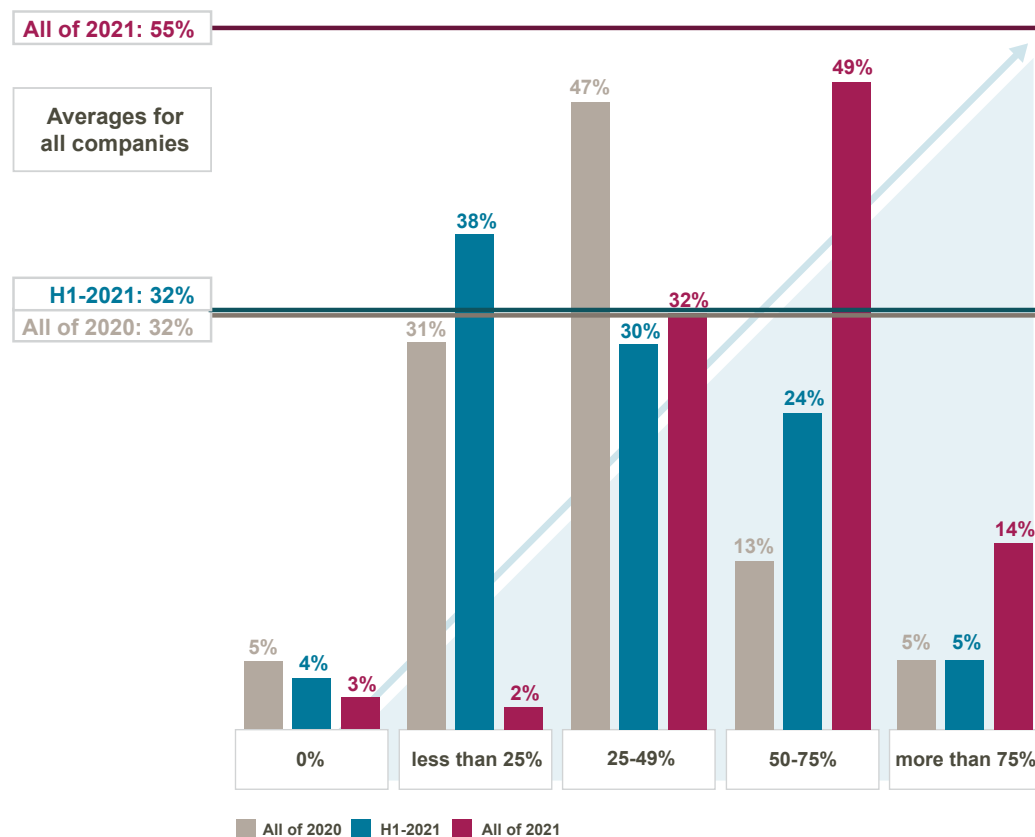


World

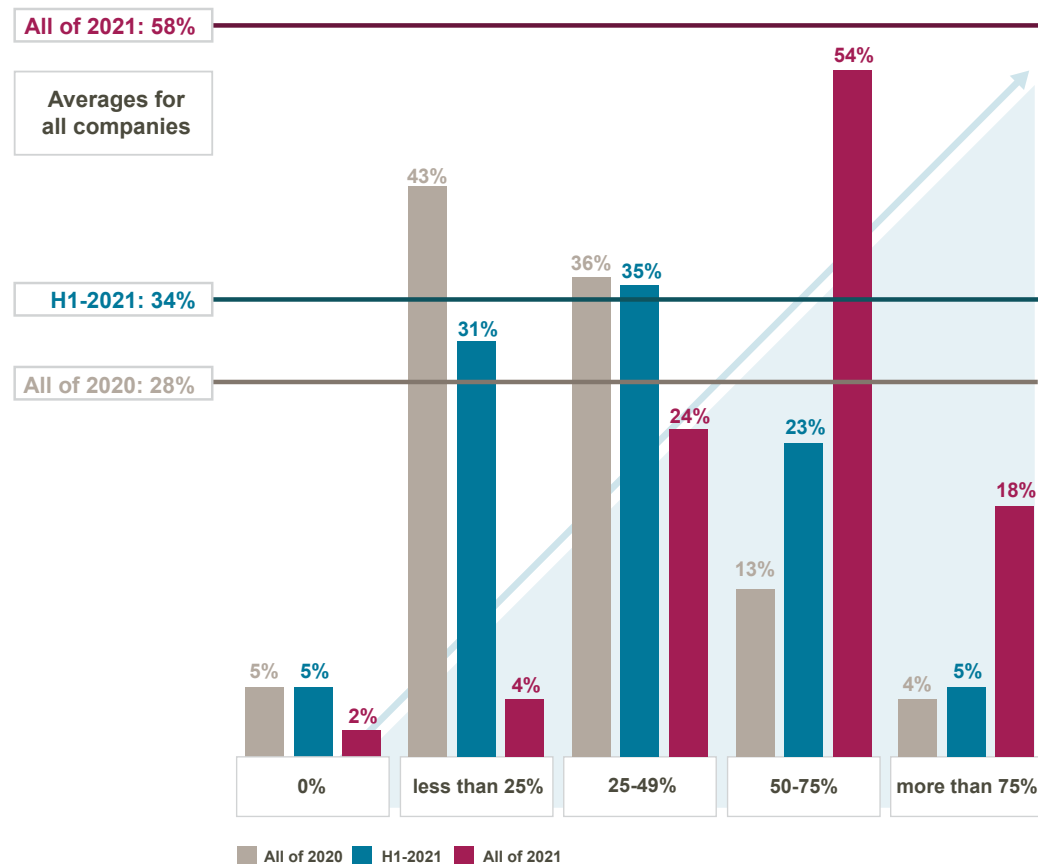


Revenue compared to last year (2019)

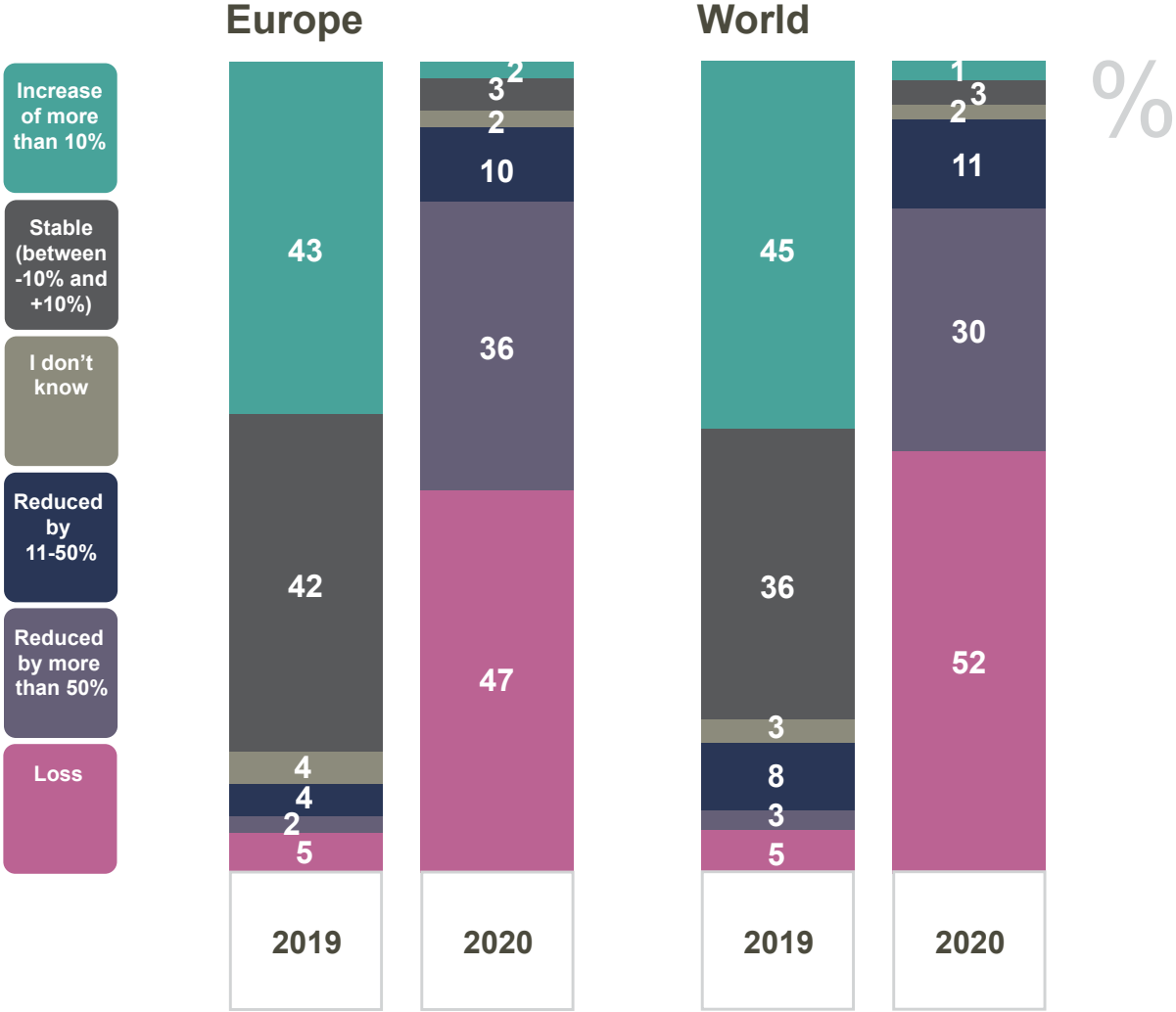
Europe



World



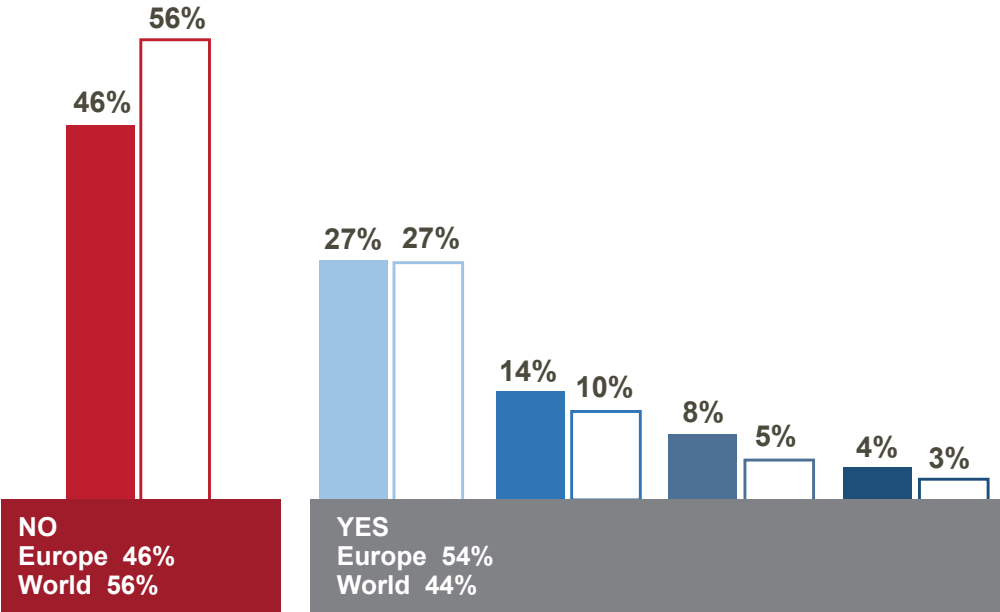
Operating profits Europe



Did your company benefit from public financial support?

Europe World

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

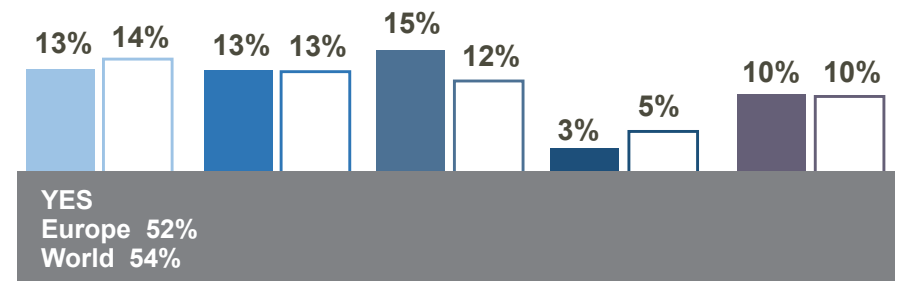
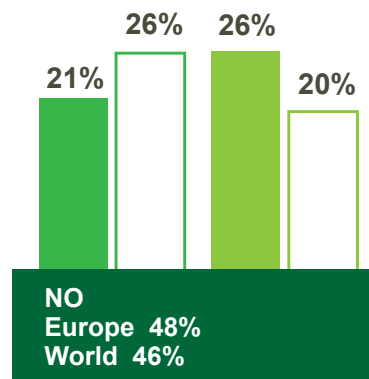


Have you had to reduce your workforce?

Europe

World

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

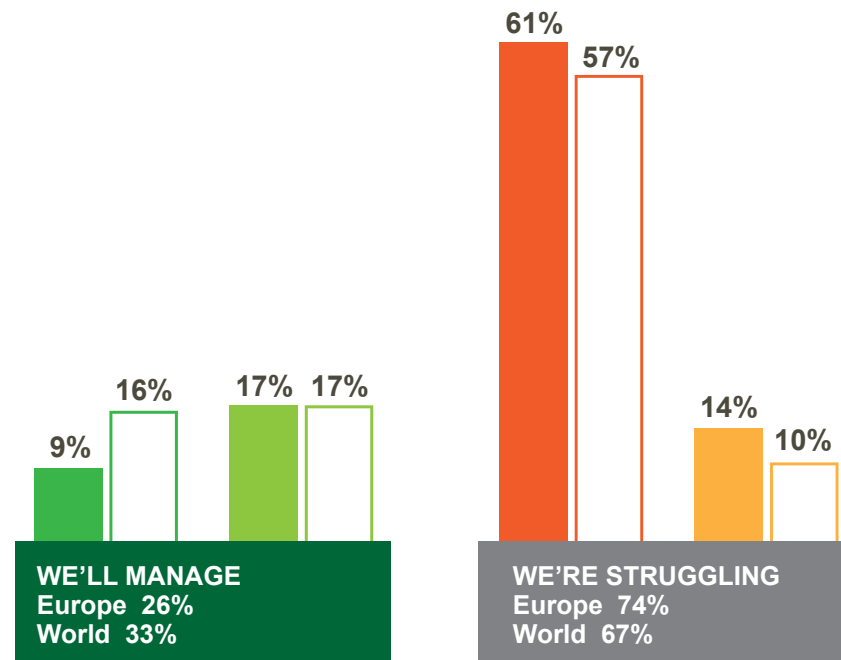


If there is no business for the next 6 months,
which best applies?

Europe

World

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

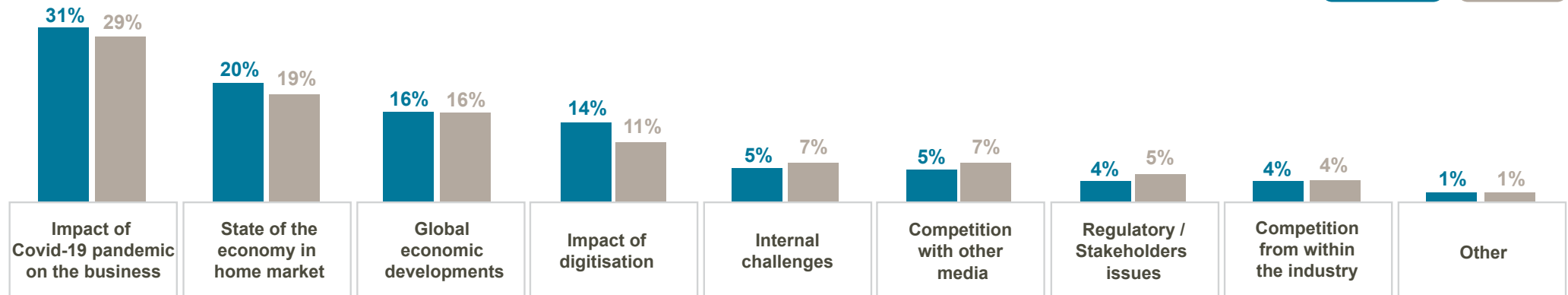


Most Important Business Issues - Format of Exhibitions - Europe

Most important business issues in the exhibition industry

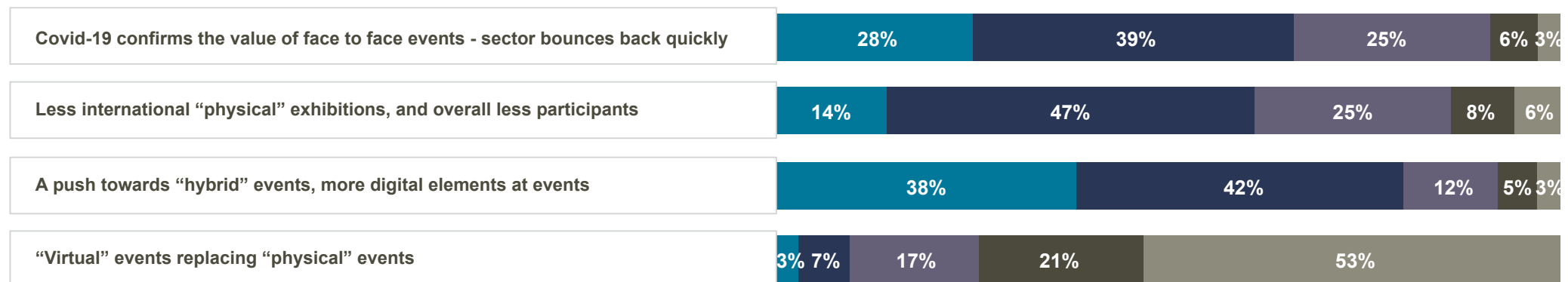
Europe

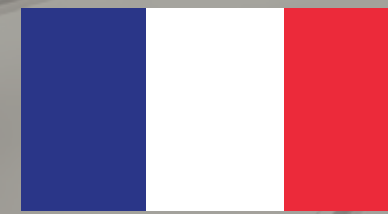
Global



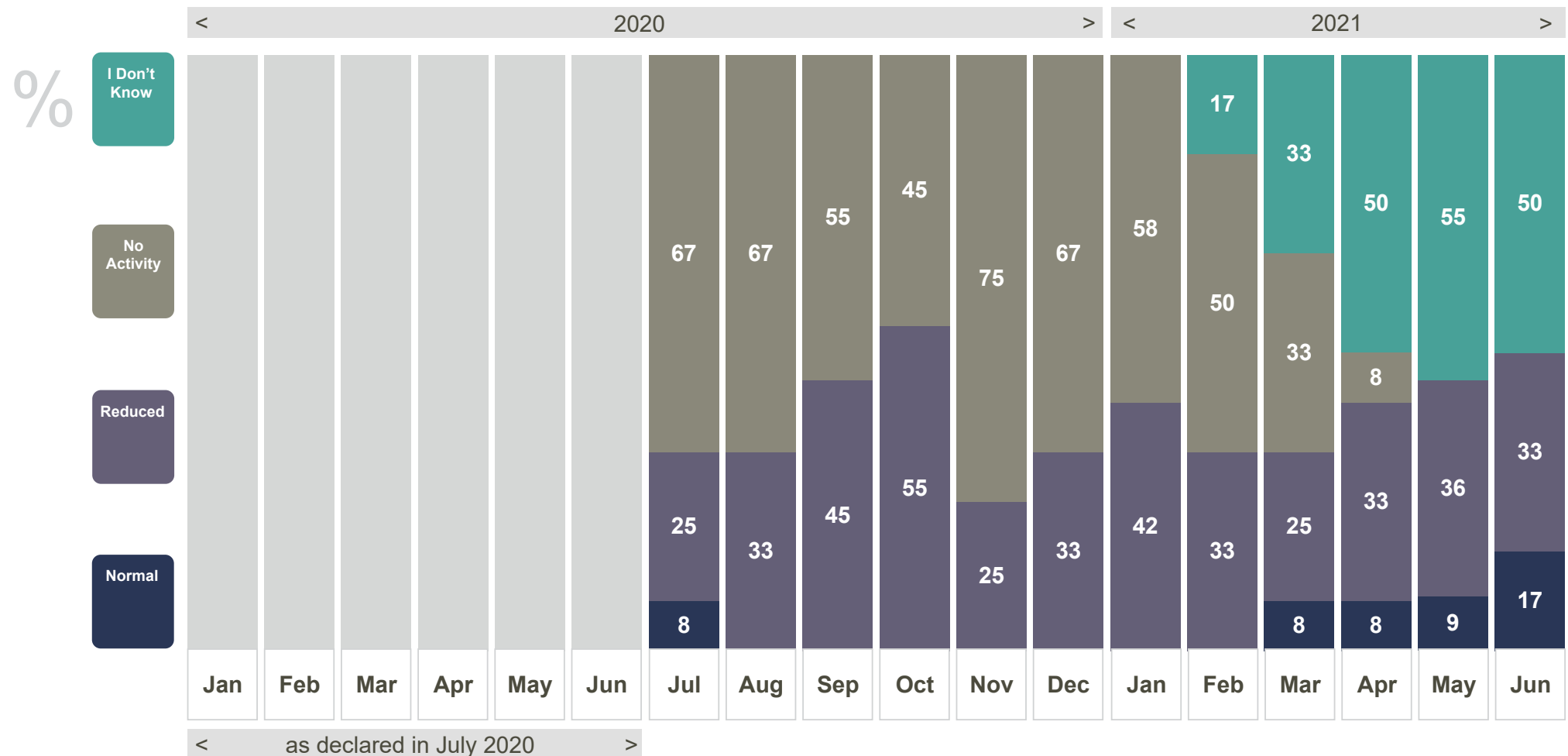
Format of exhibitions in the coming years

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

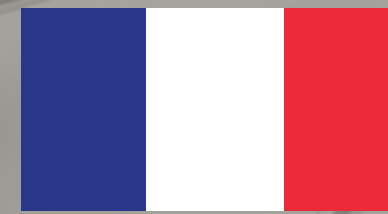




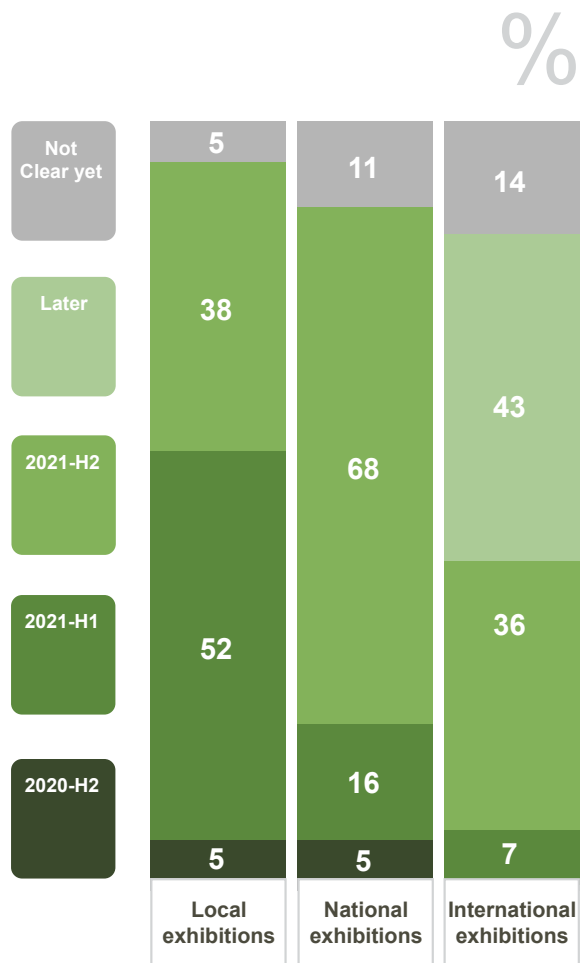
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



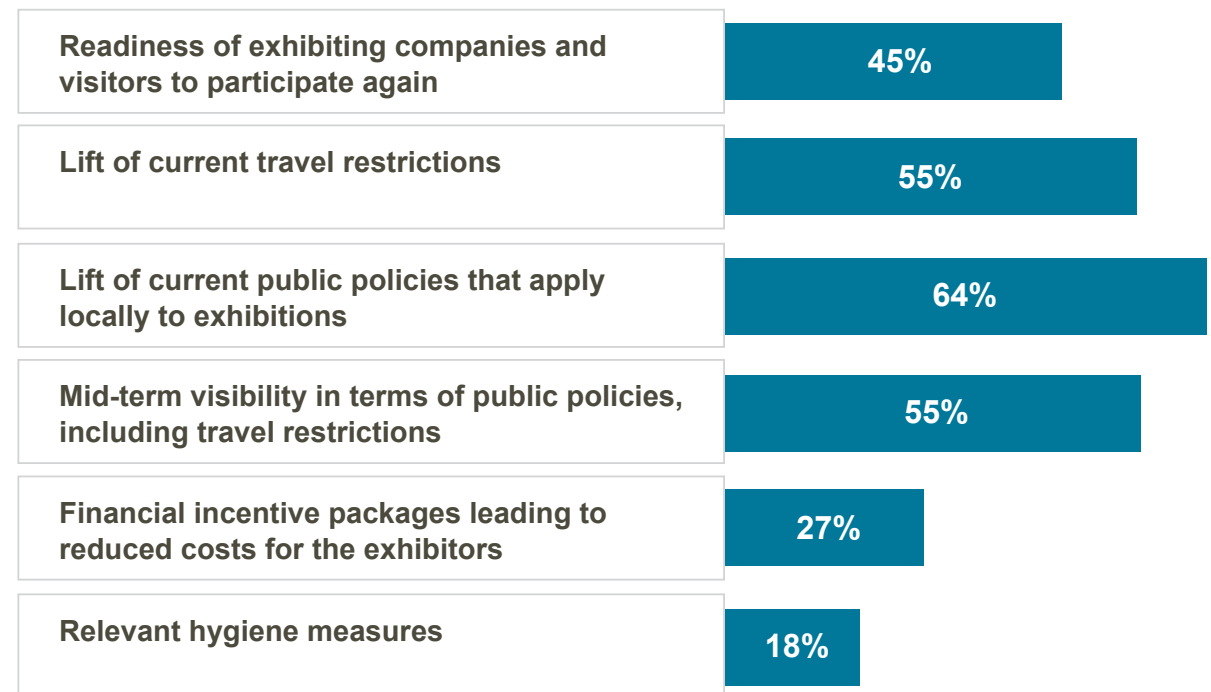
Detailed results for France

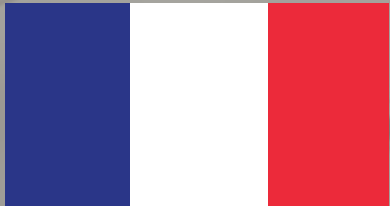


When do you believe exhibitions will open again in your city?

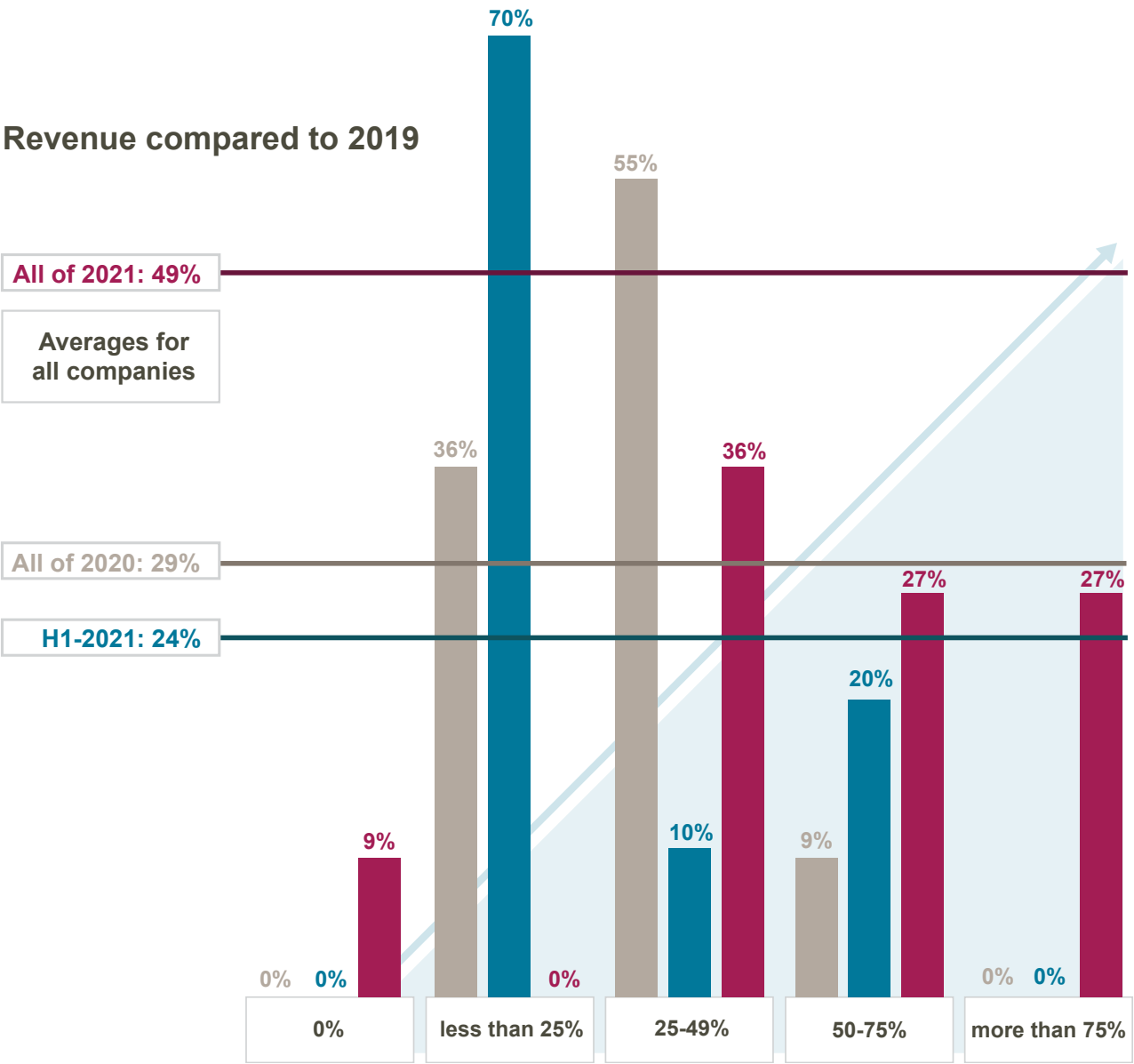


What do you believe would most help the “bounce back” of exhibitions?

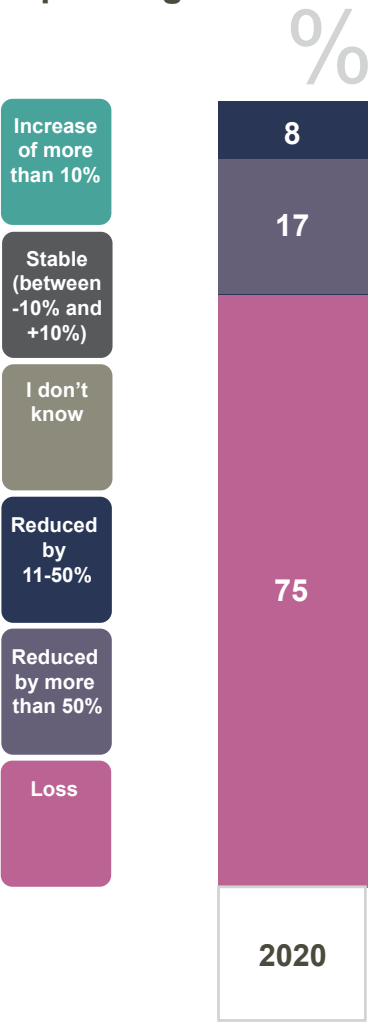




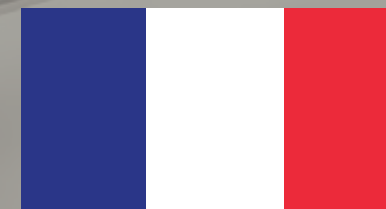
Revenue compared to 2019



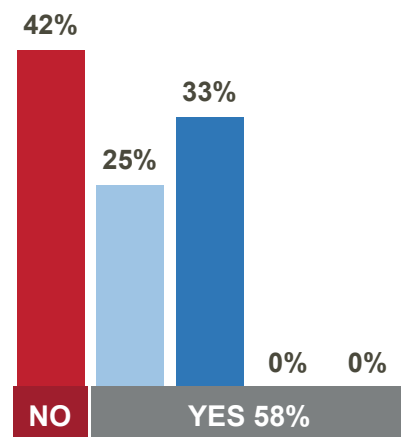
Operating Profits



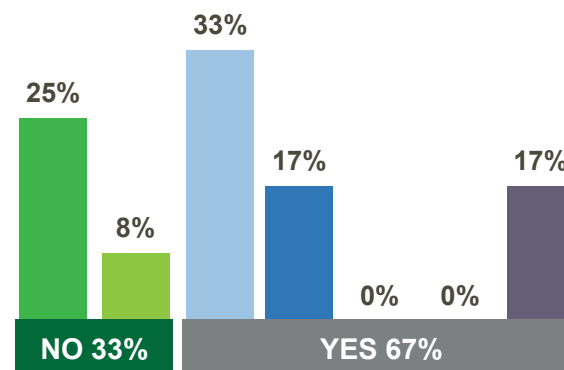
Detailed results for France



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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

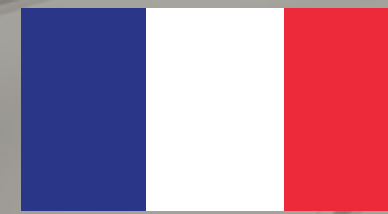


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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

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

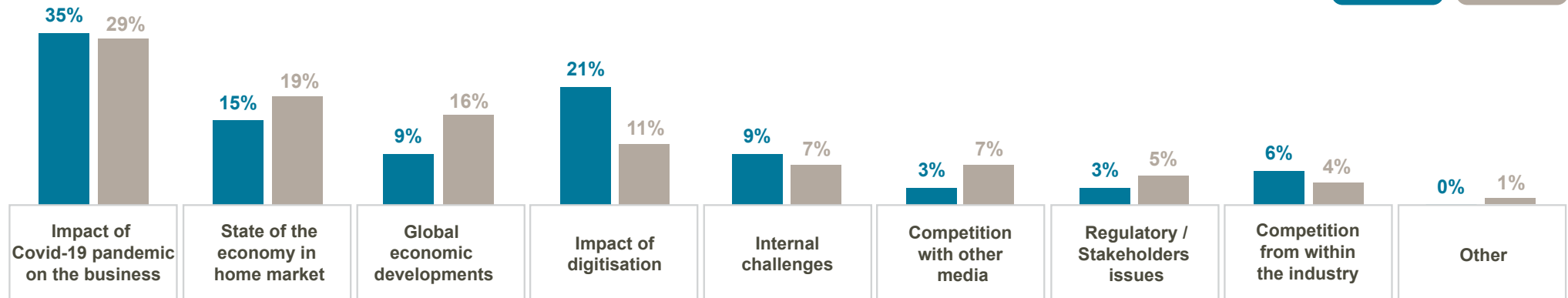
Detailed results for France



Most important business issues in the exhibition industry

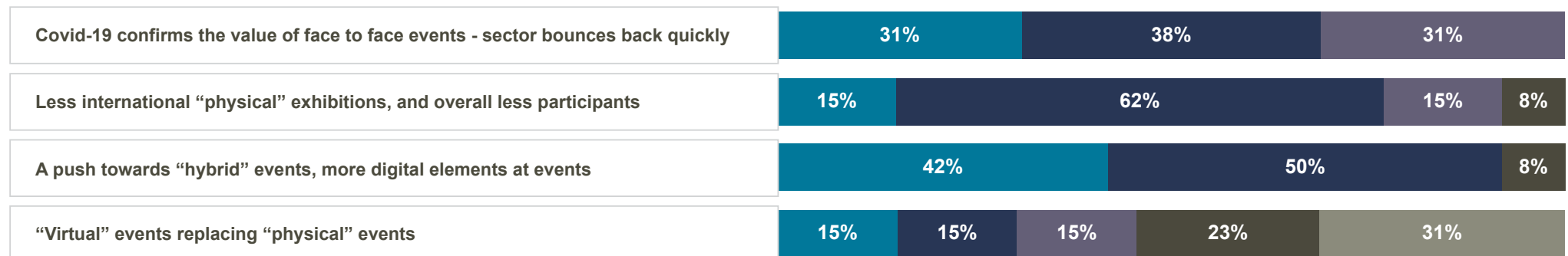
France

Global



Format of exhibitions in the coming years

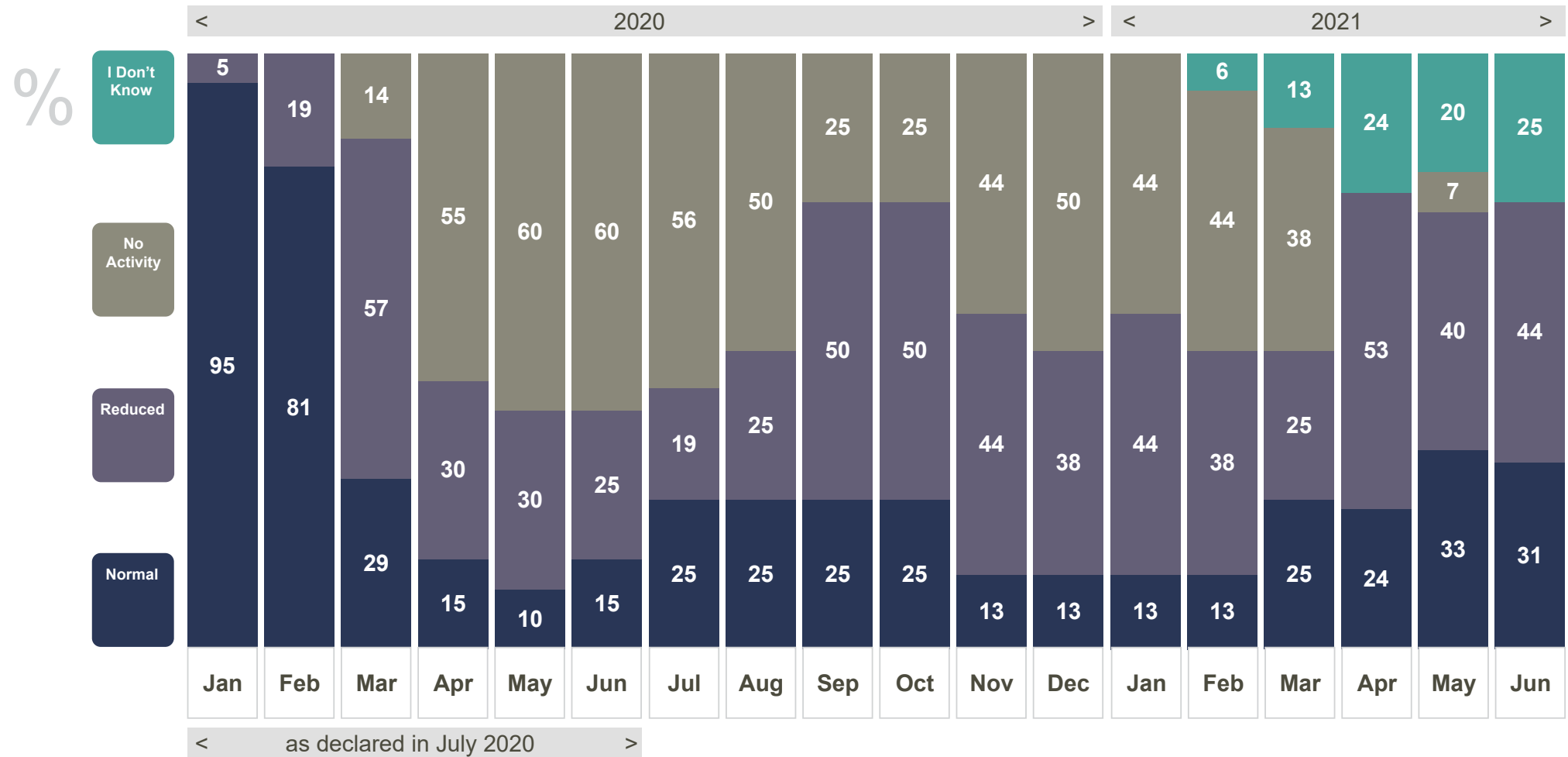
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Germany



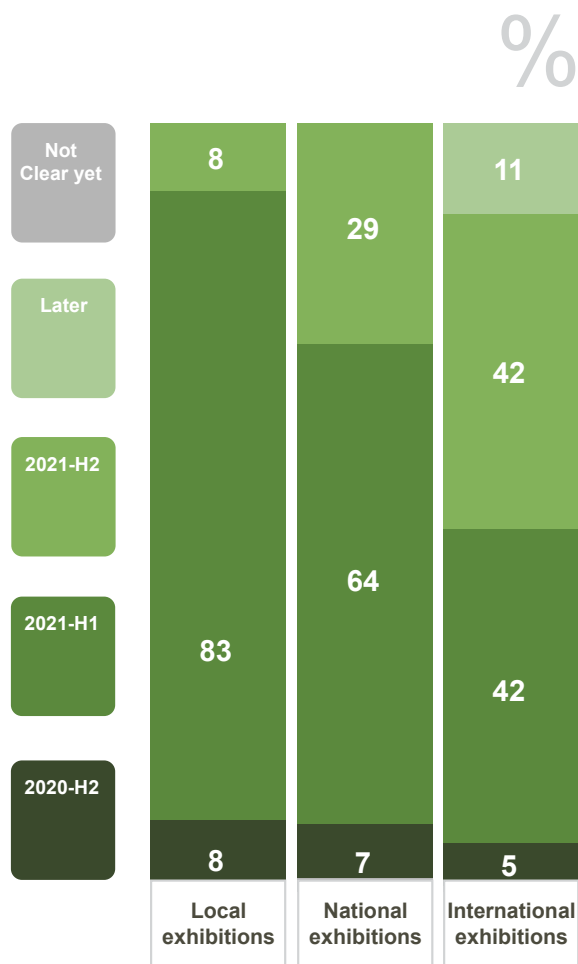
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



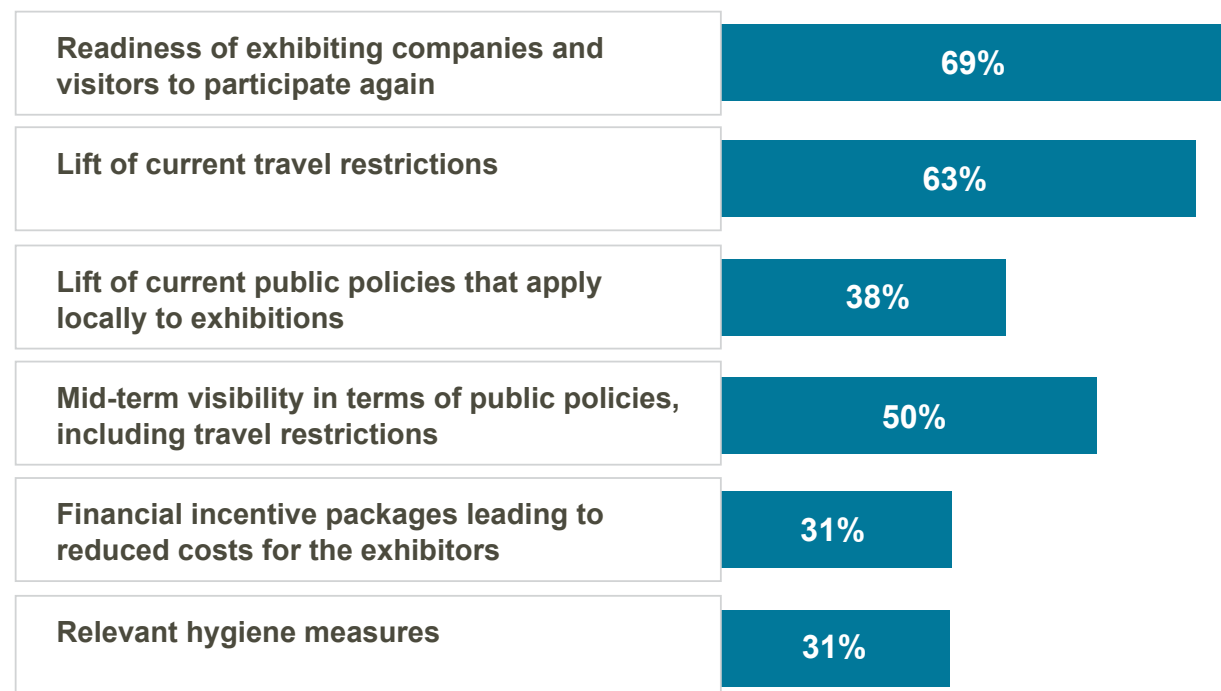
Detailed results for Germany



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



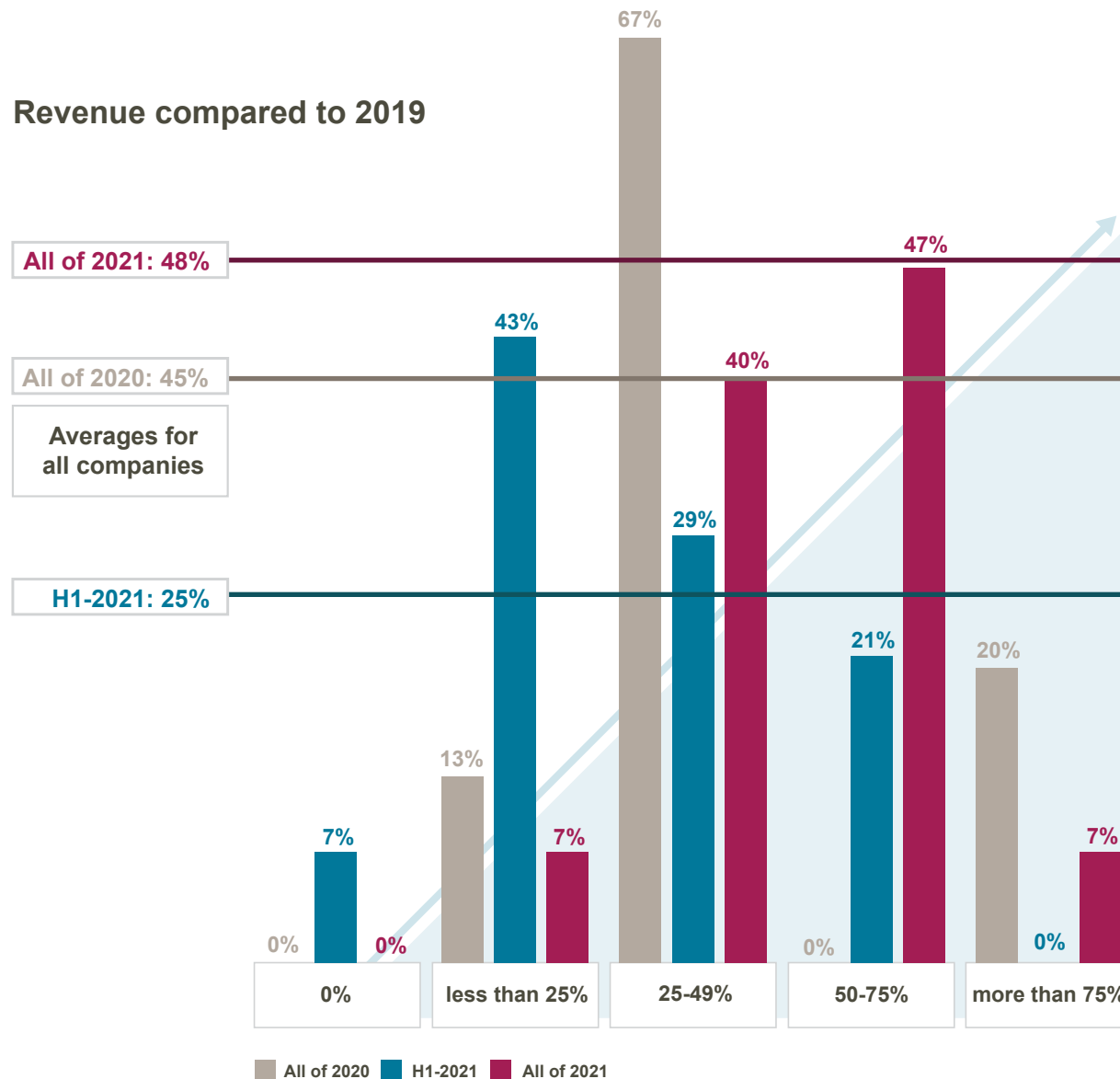
What do you believe would most help the “bounce back” of exhibitions?



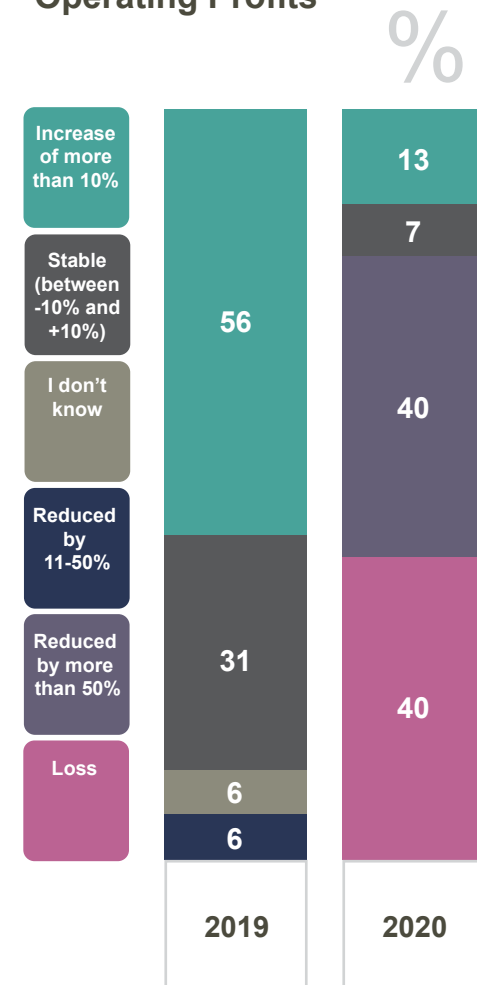
Detailed results for Germany



Revenue compared to 2019



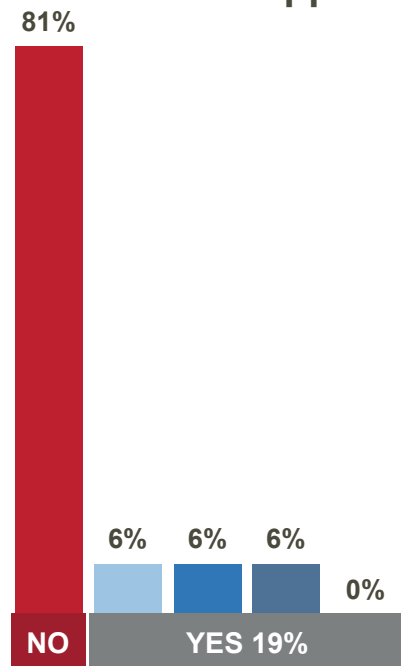
Operating Profits



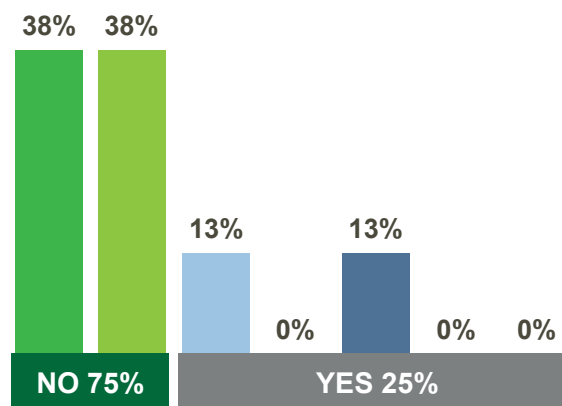
Detailed results for Germany



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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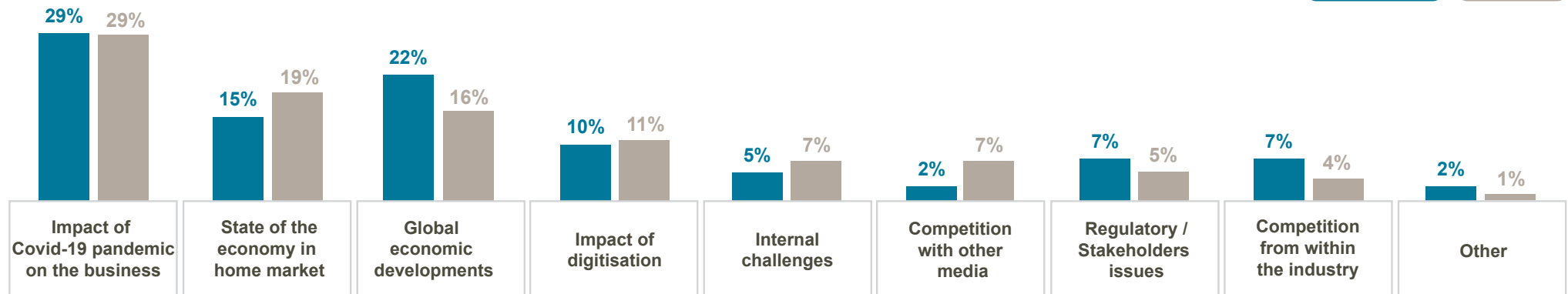
Detailed results for Germany



Most important business issues in the exhibition industry

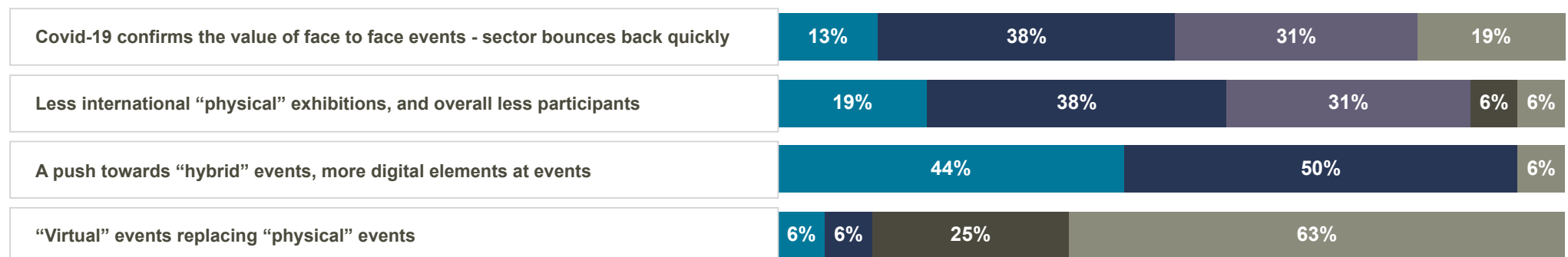
Germany

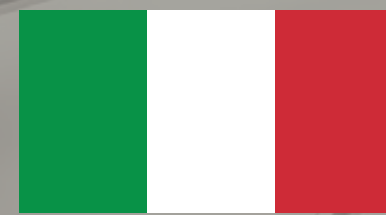
Global



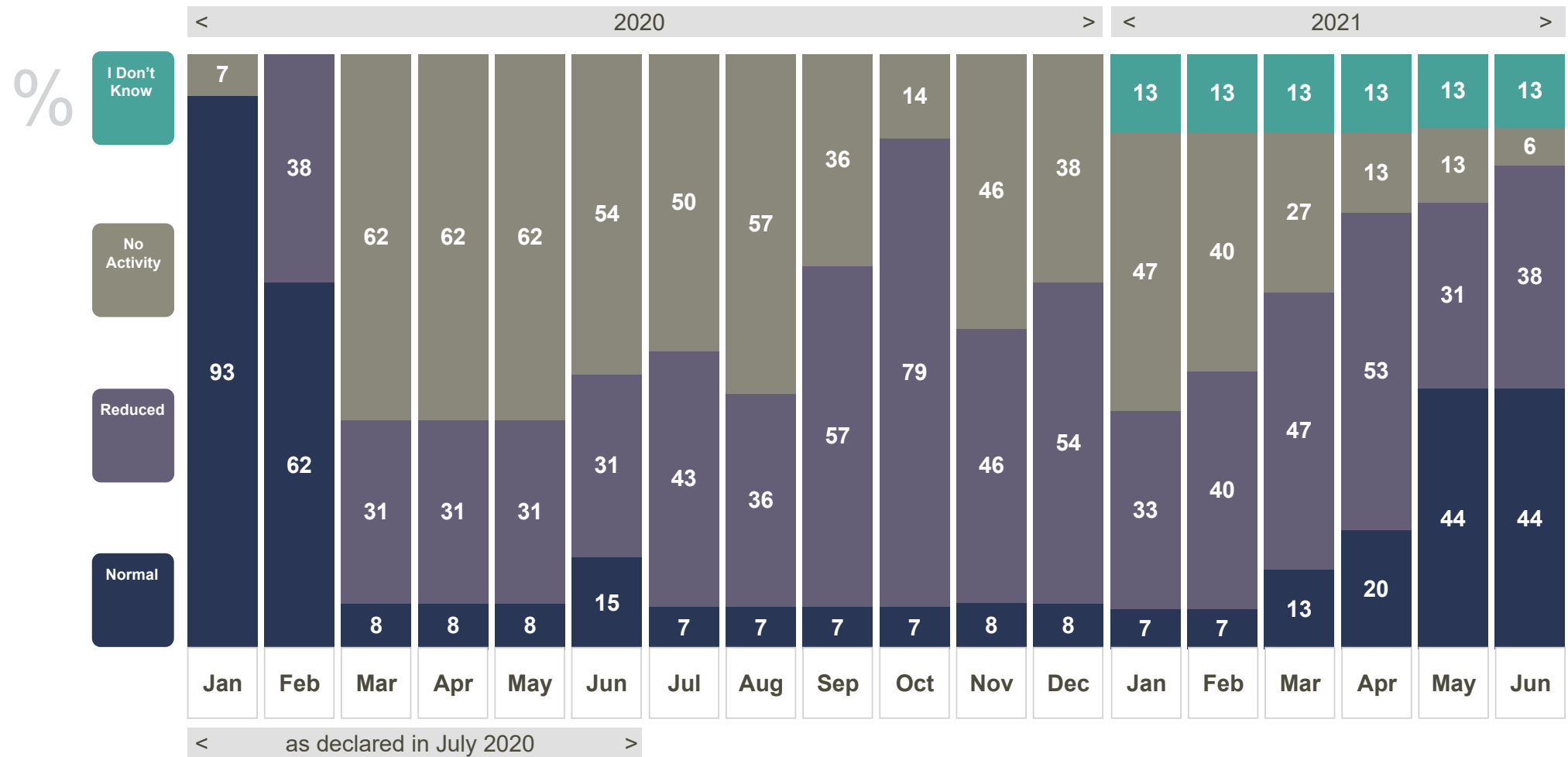
Format of exhibitions in the coming years

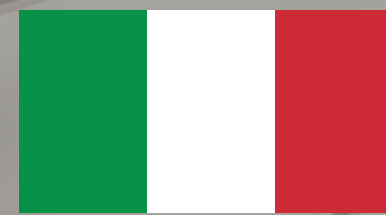
Yes, for sure Most probably Not sure Not sure at all Definitely not



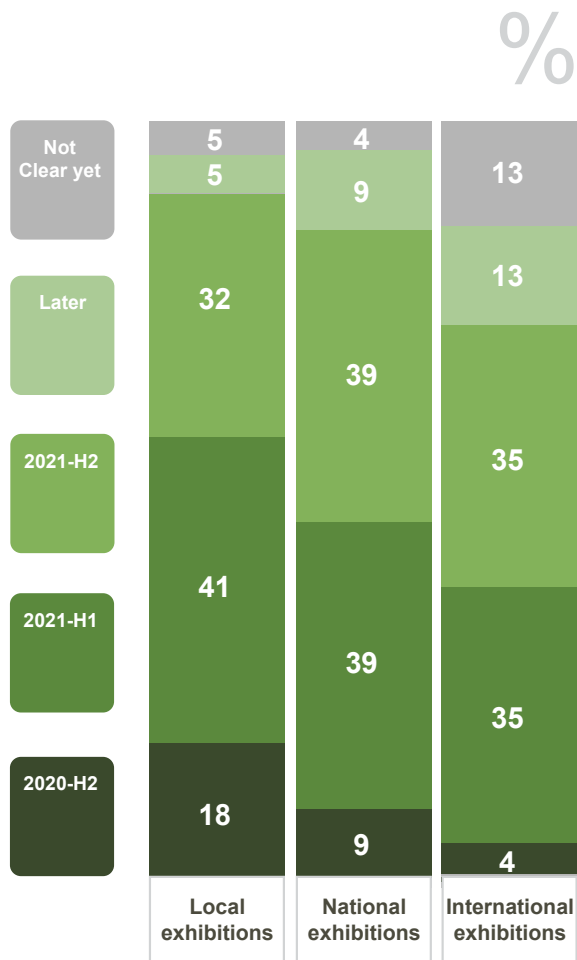


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

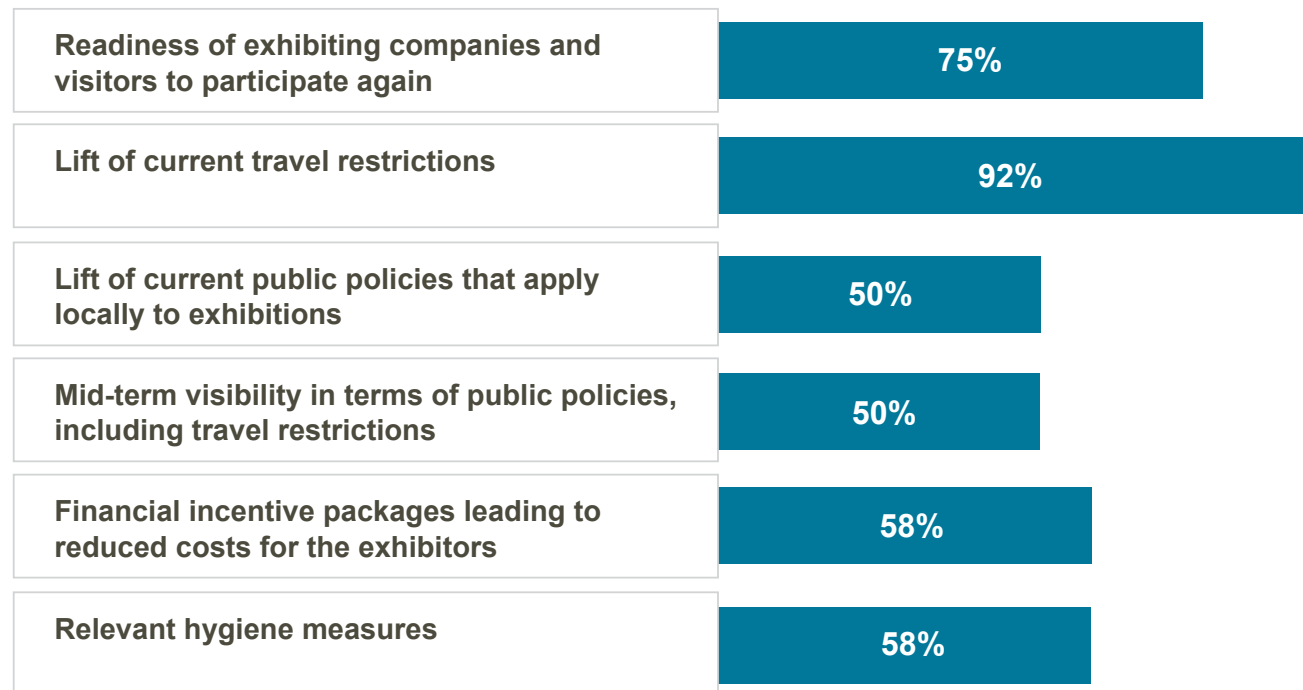


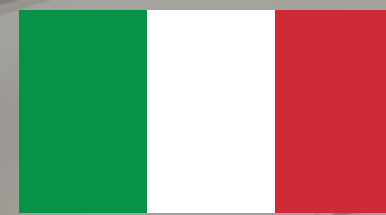


When do you believe exhibitions will open again in your city?

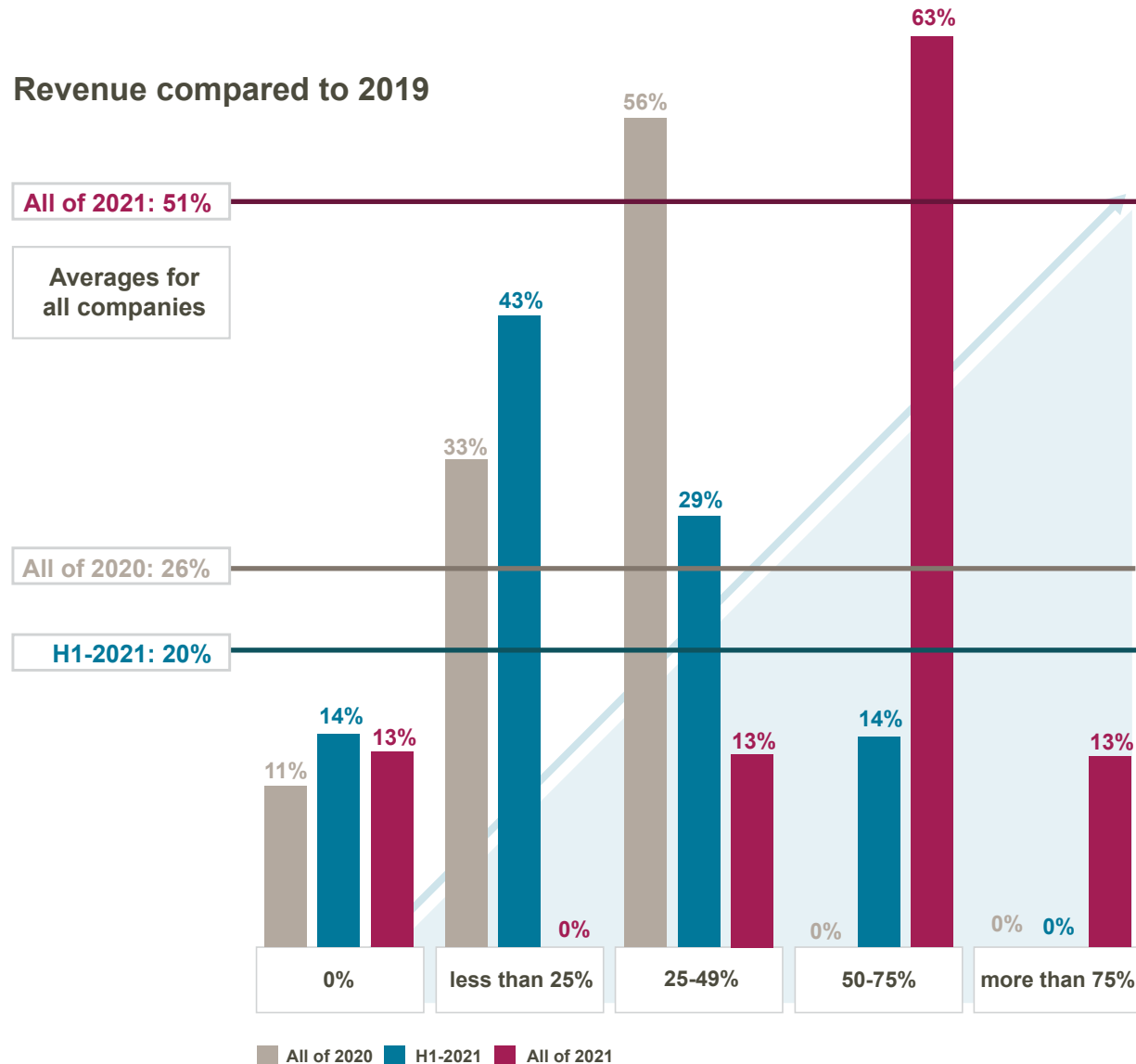


What do you believe would most help the “bounce back” of exhibitions?

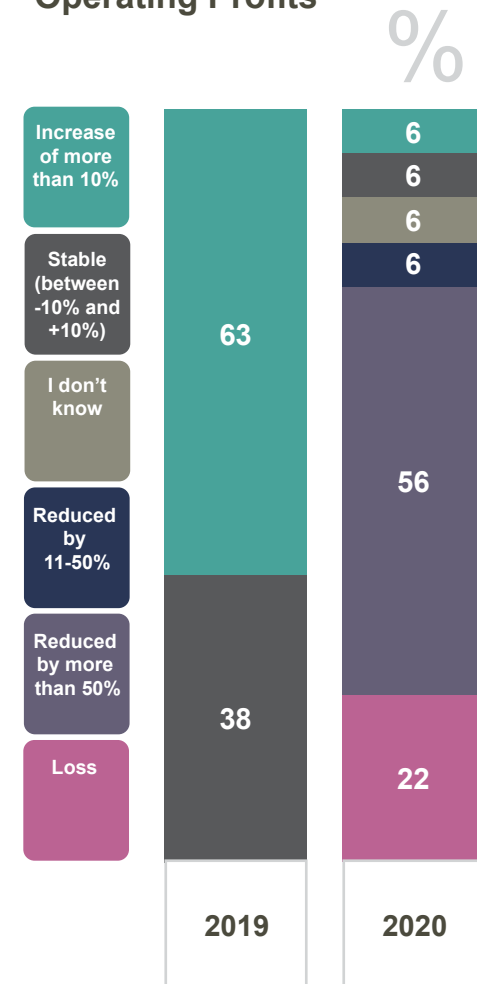




Revenue compared to 2019

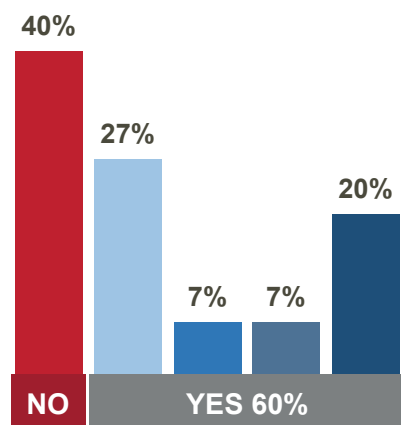


Operating Profits

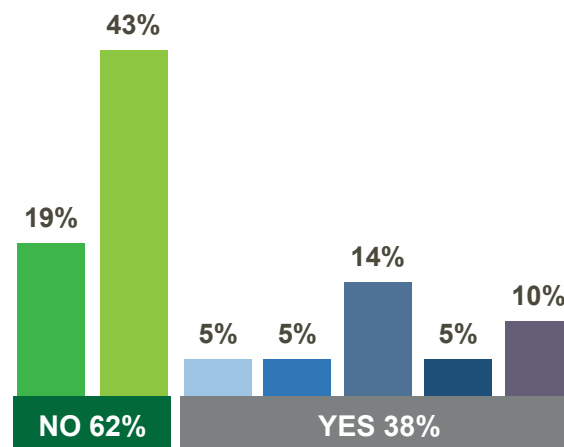




Did your company benefit from public financial support?



Have you had to reduce your workforce?



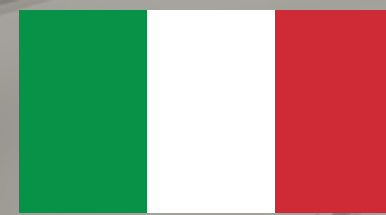
If there is no business for the next 6 months, which best applies?



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

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
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- Yes, up to 75%
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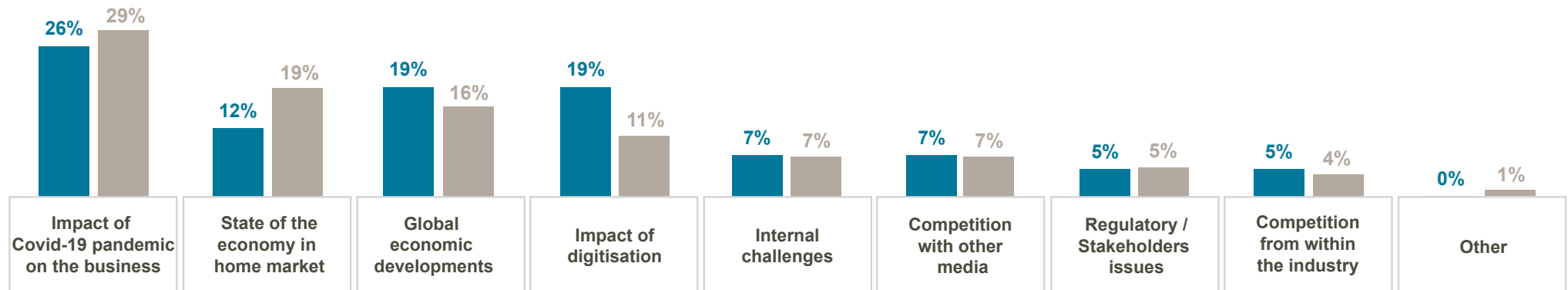
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
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Most important business issues in the exhibition industry

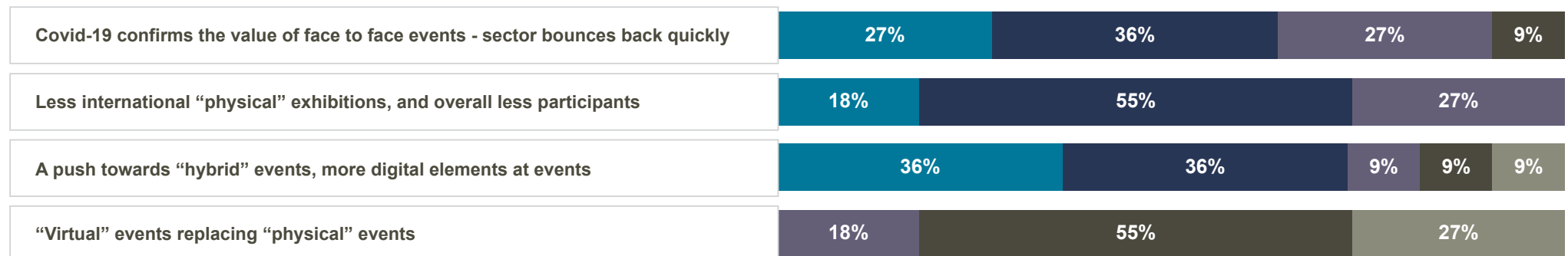
Italy

Global

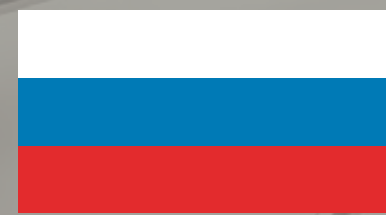


Format of exhibitions in the coming years

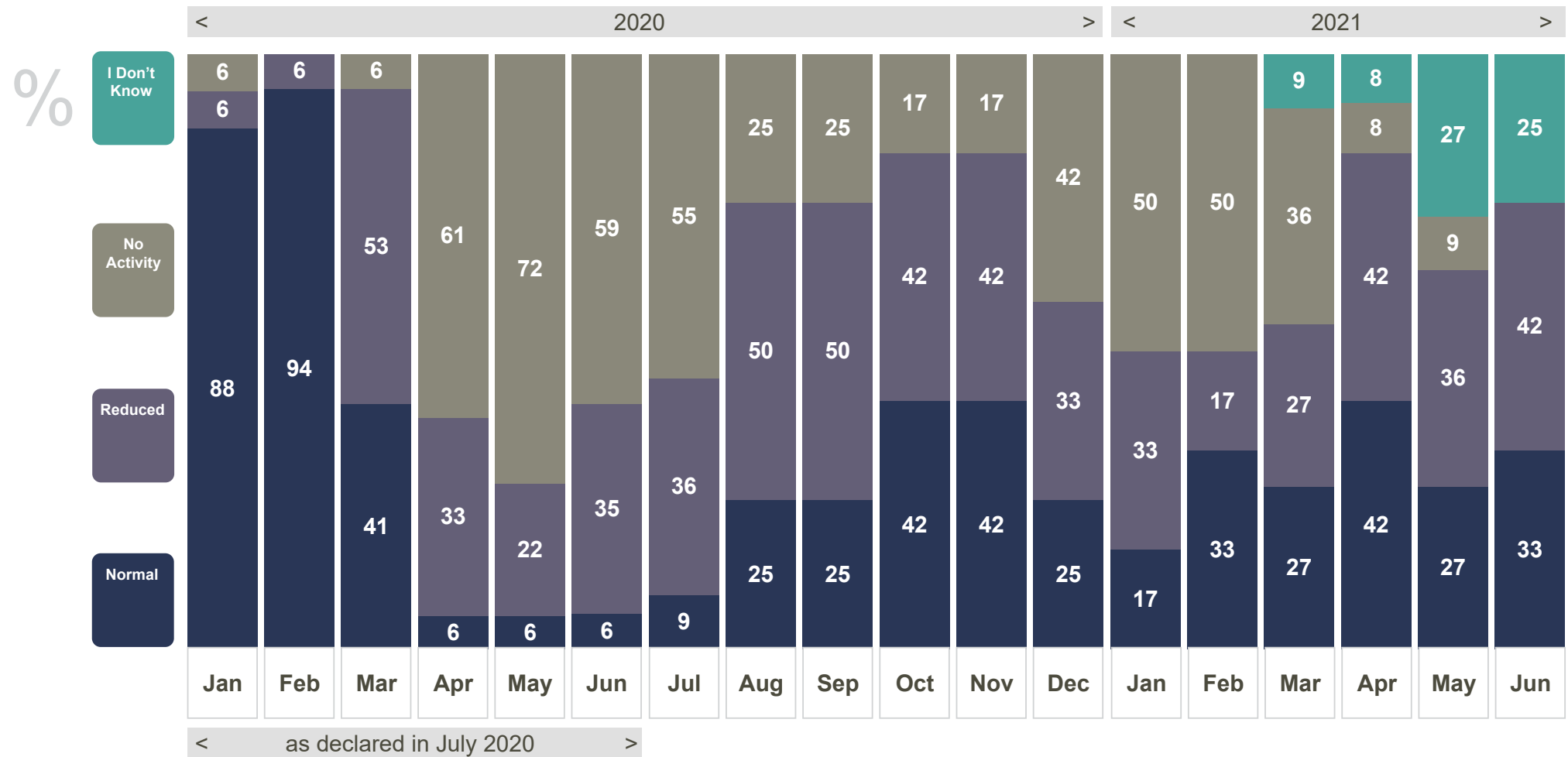
■ Yes, for sure
 ■ Most probably
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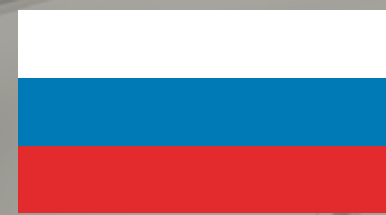
Detailed results for Russian Federation



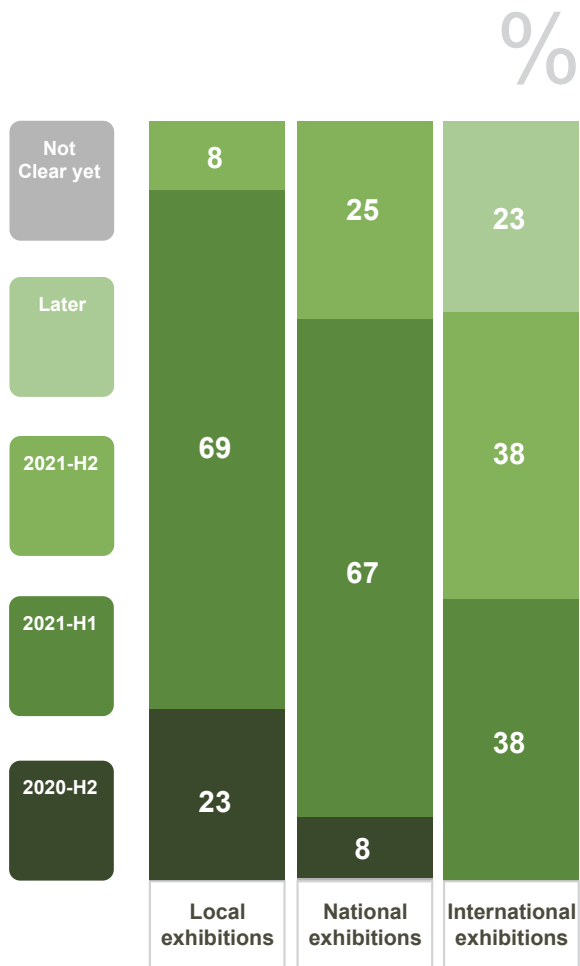
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



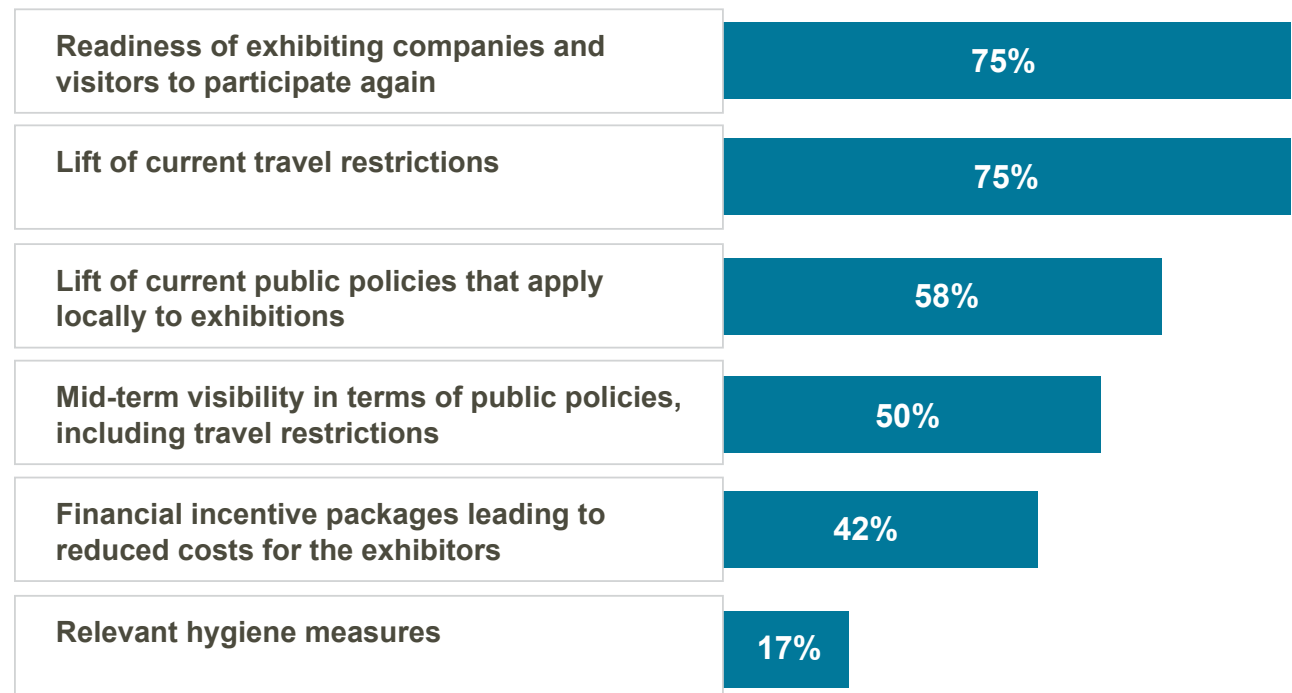
Detailed results for Russian Federation



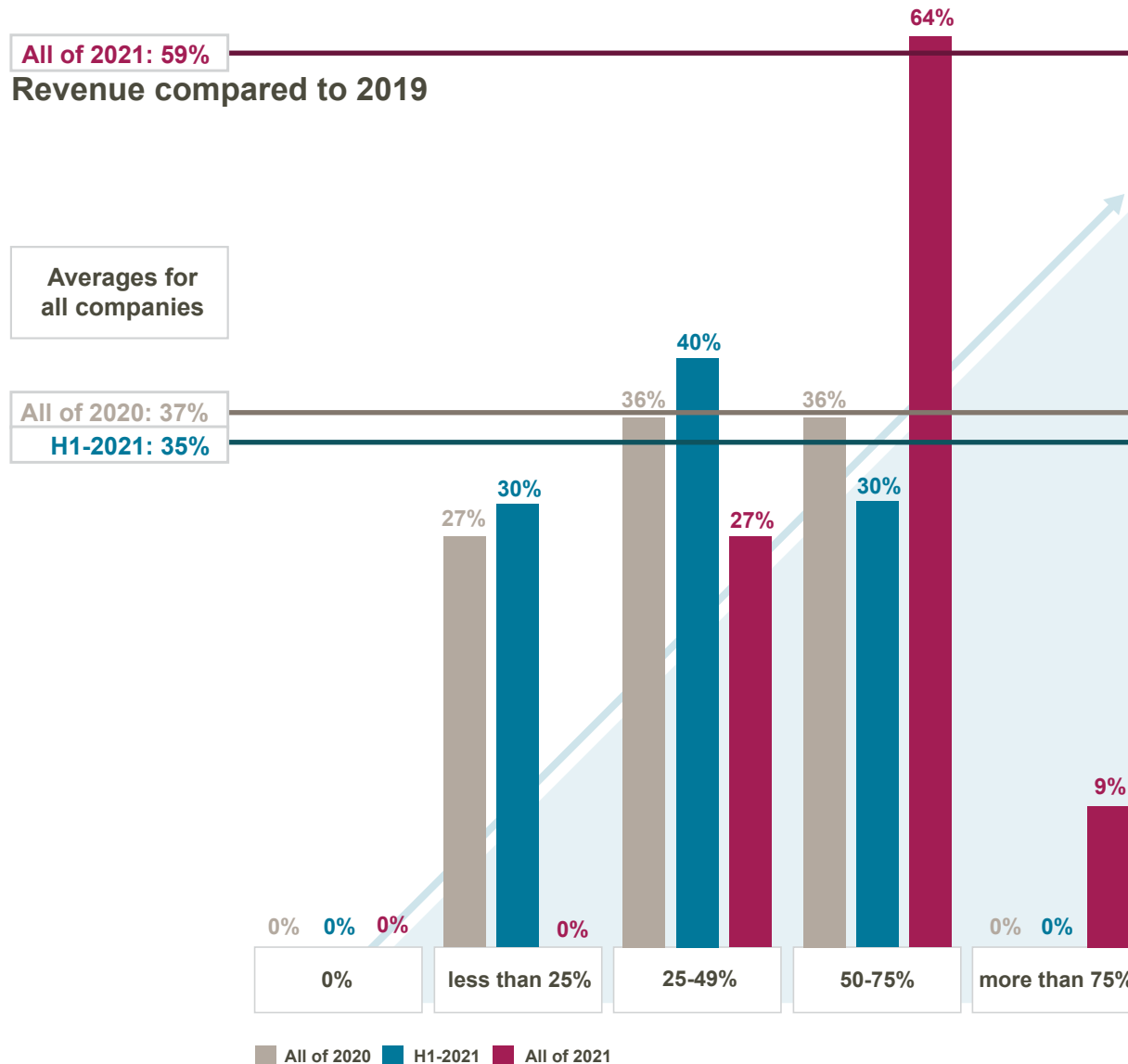
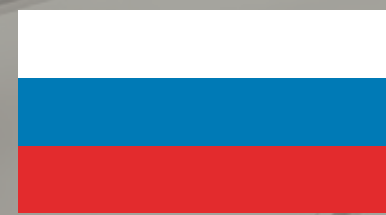
When do you believe exhibitions will open again in your city?



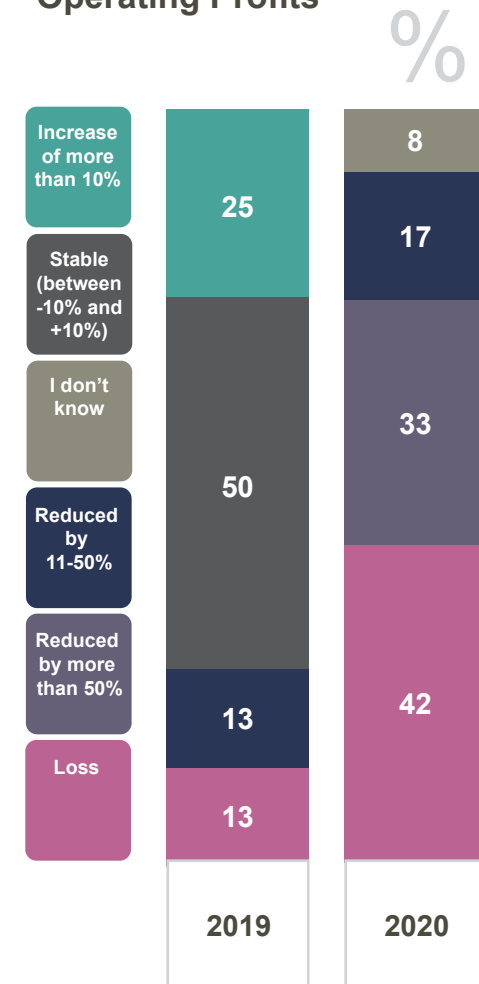
What do you believe would most help the “bounce back” of exhibitions?



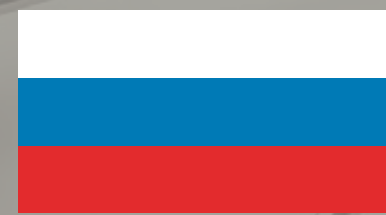
Detailed results for Russian Federation



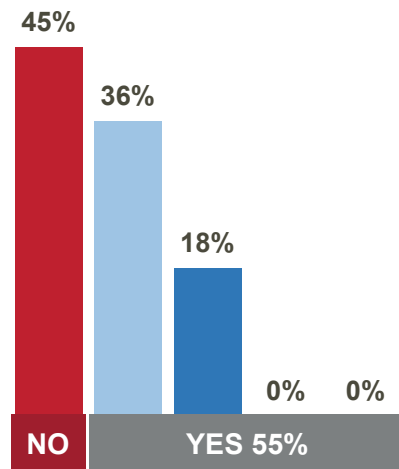
Operating Profits



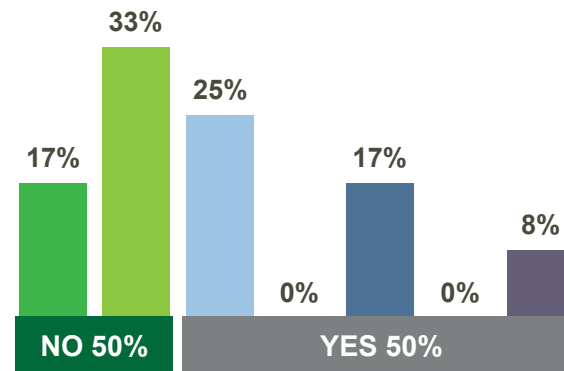
Detailed results for Russian Federation



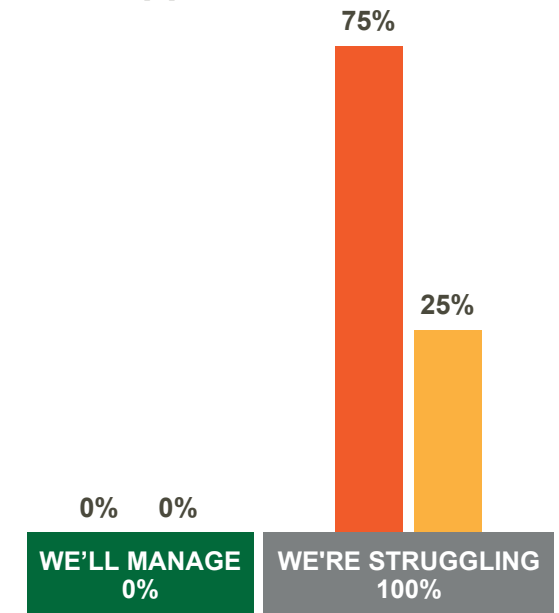
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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

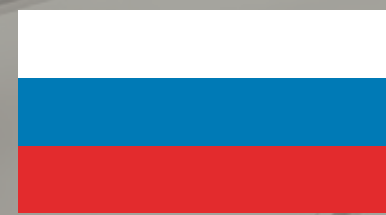


- No
- Yes, for less than 10% of our 2019 overall costs
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- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

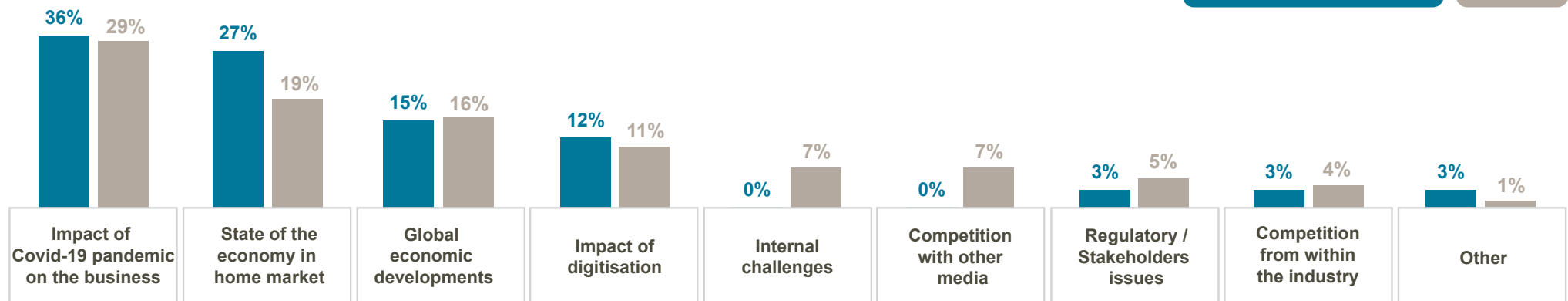
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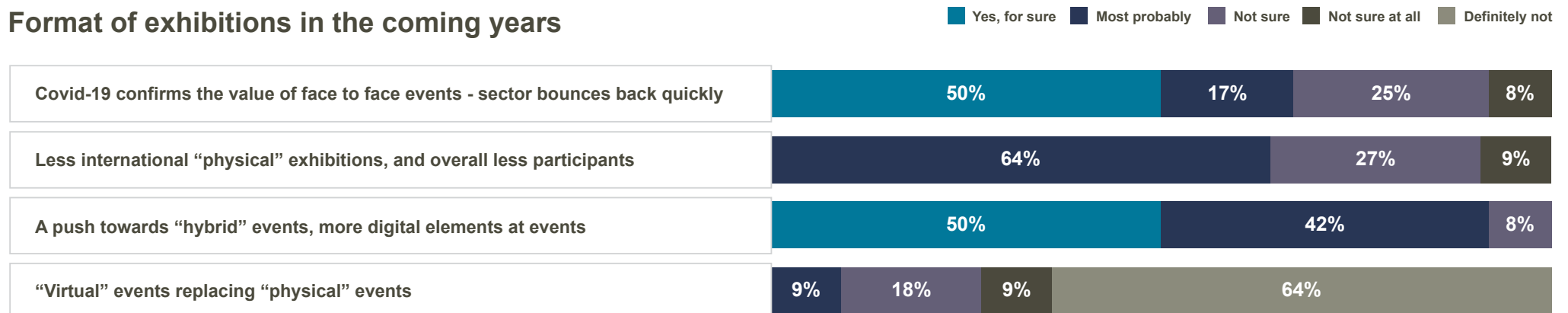
Detailed results for Russian Federation



Most important business issues in the exhibition industry



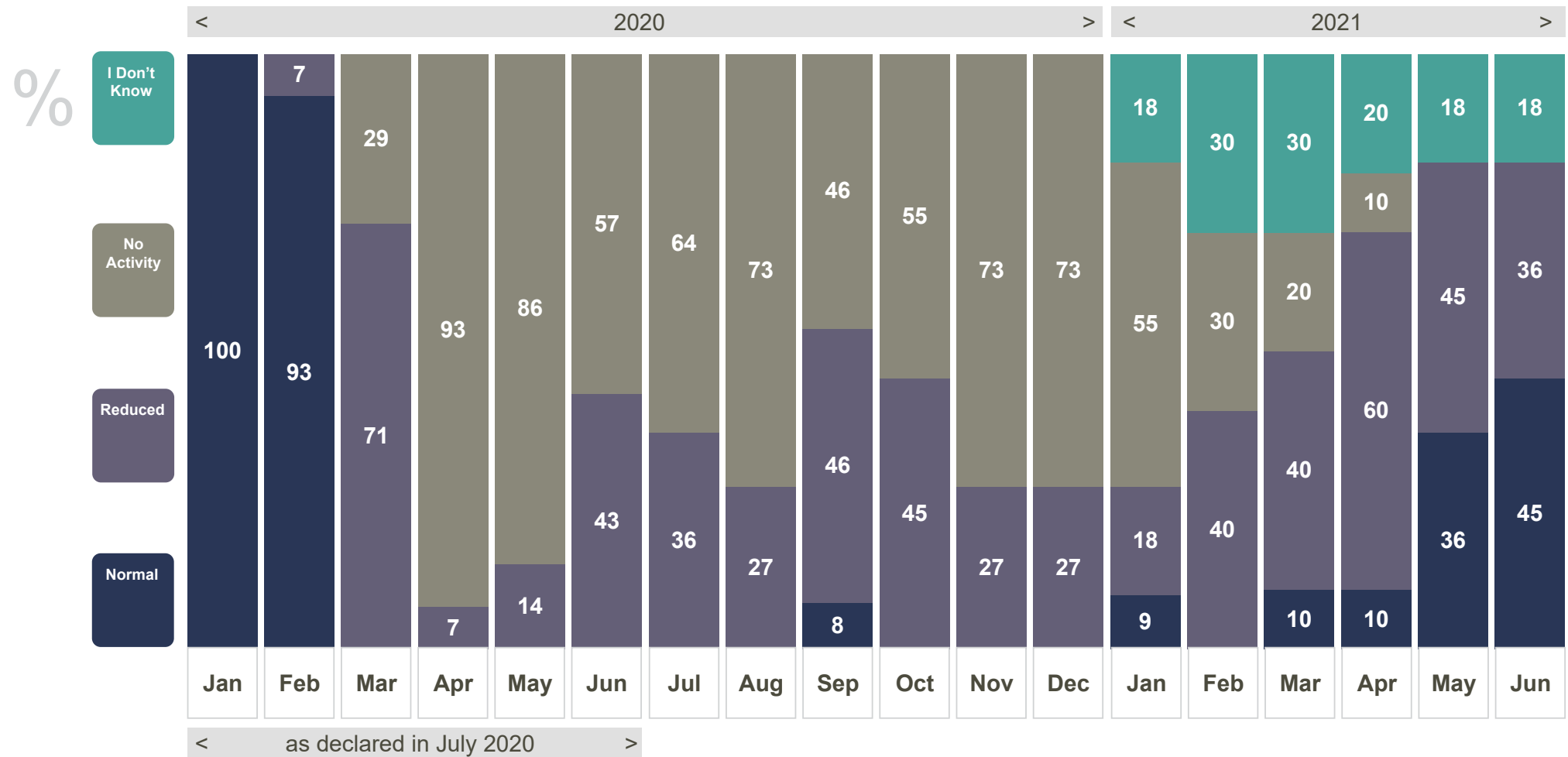
Format of exhibitions in the coming years



Detailed results for Spain



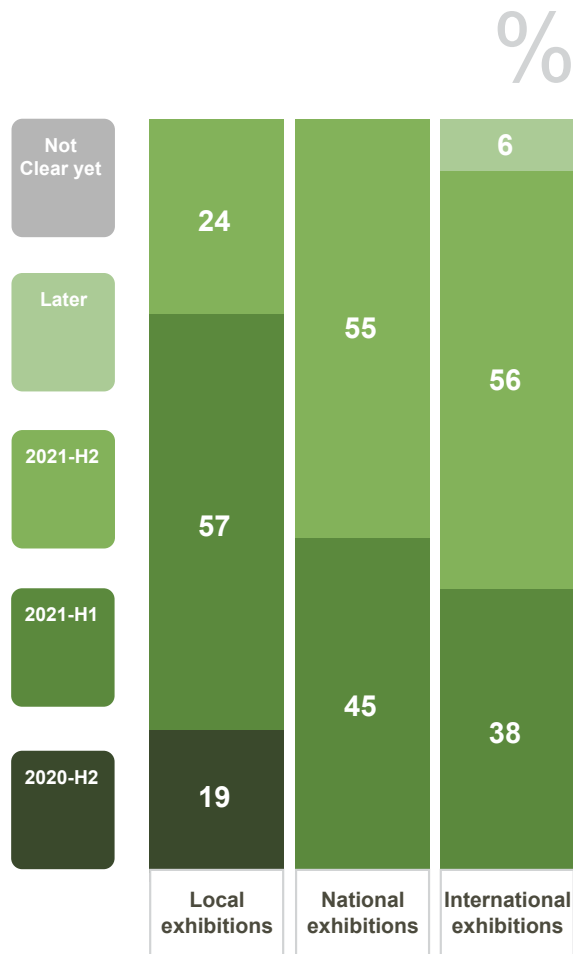
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



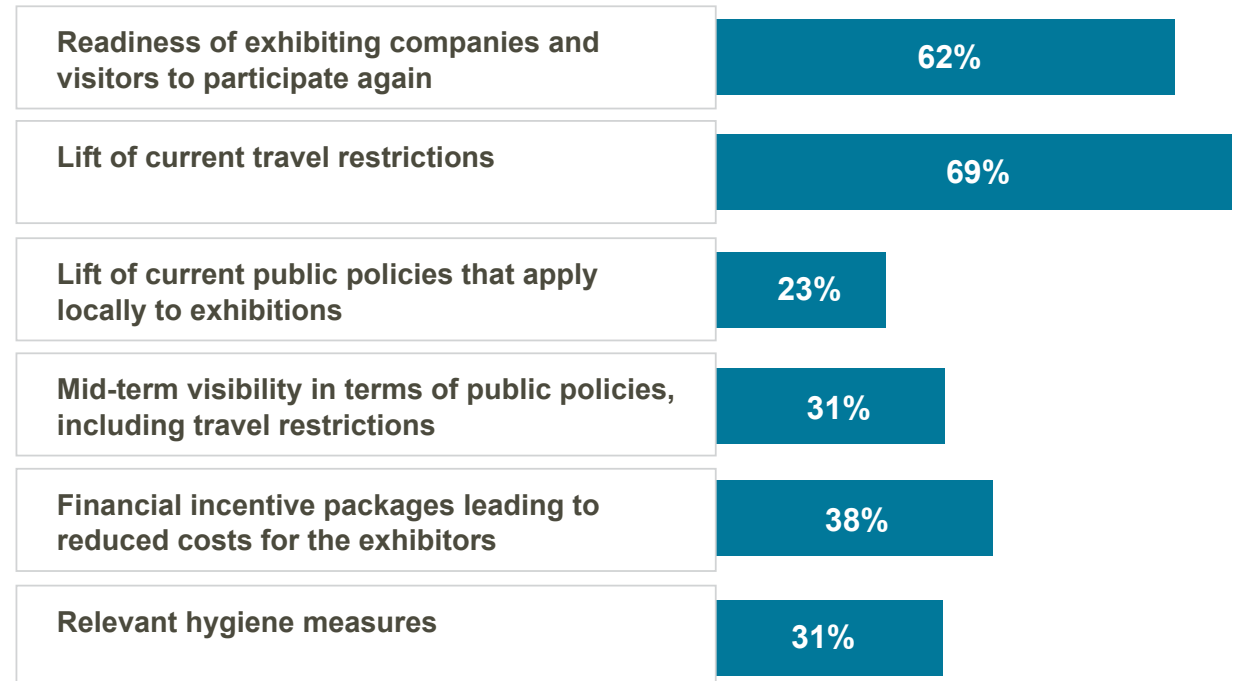
Detailed results for Spain



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



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

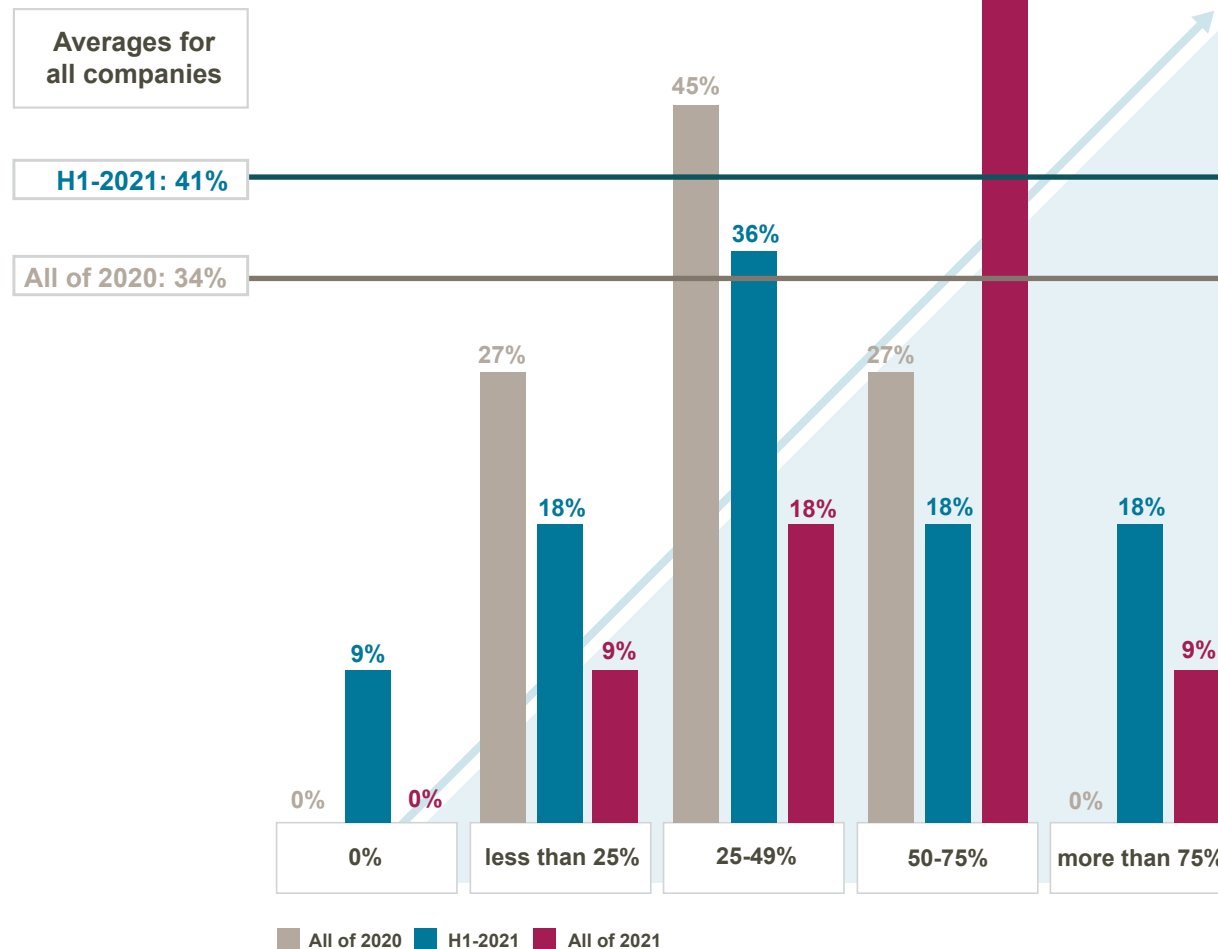


Detailed results for Spain

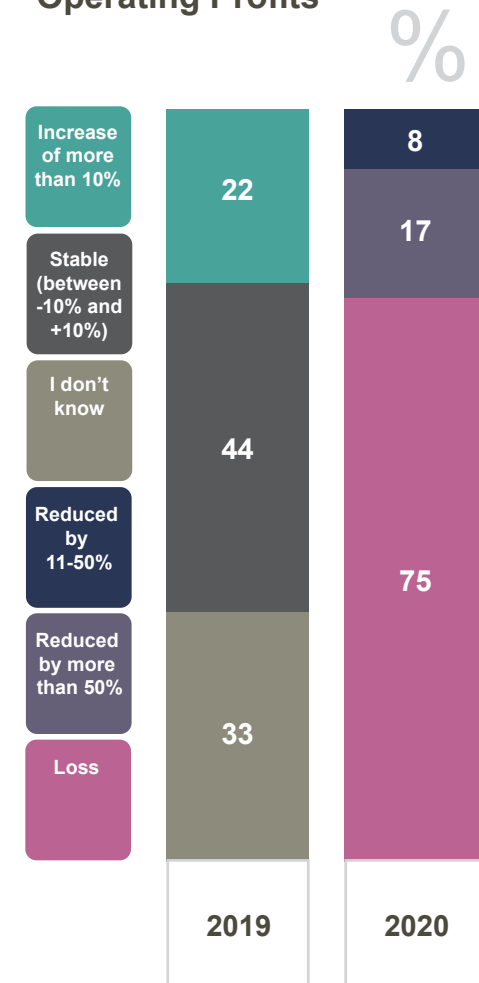


All of 2021: 66%

Revenue compared to 2019



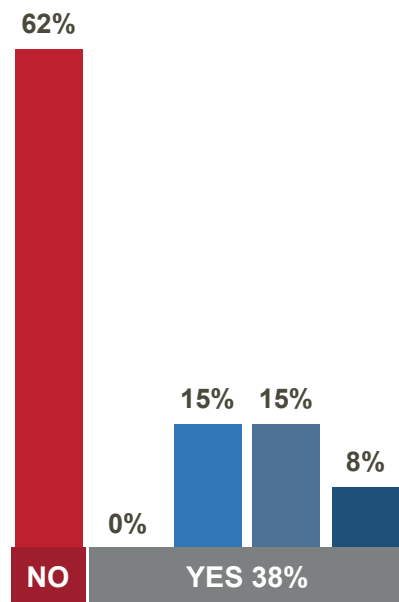
Operating Profits



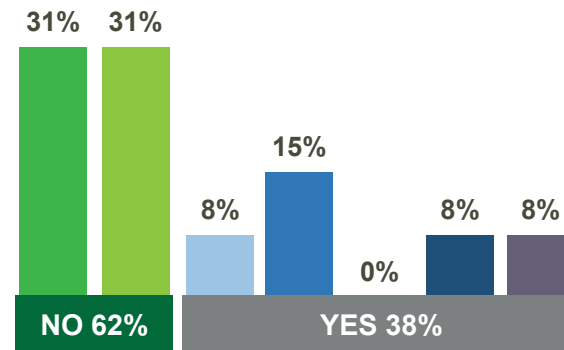
Detailed results for Spain



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



- No
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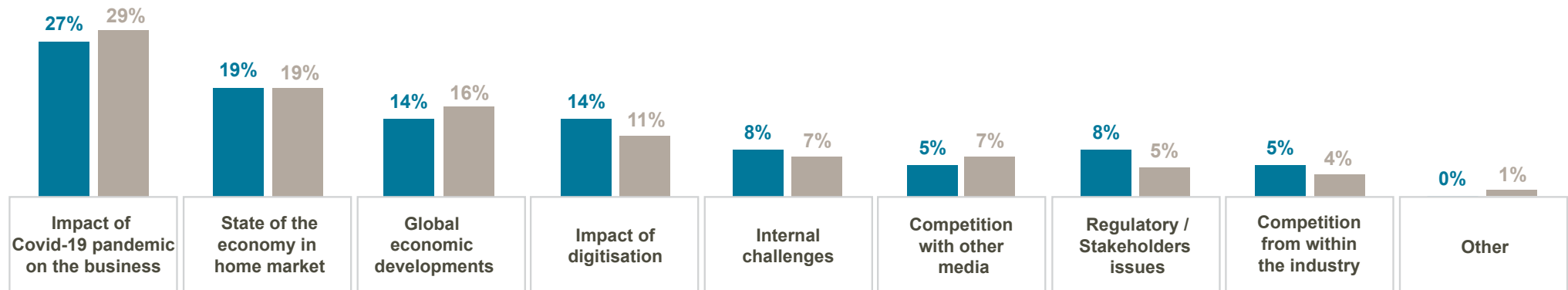
Detailed results for Spain



Most important business issues in the exhibition industry

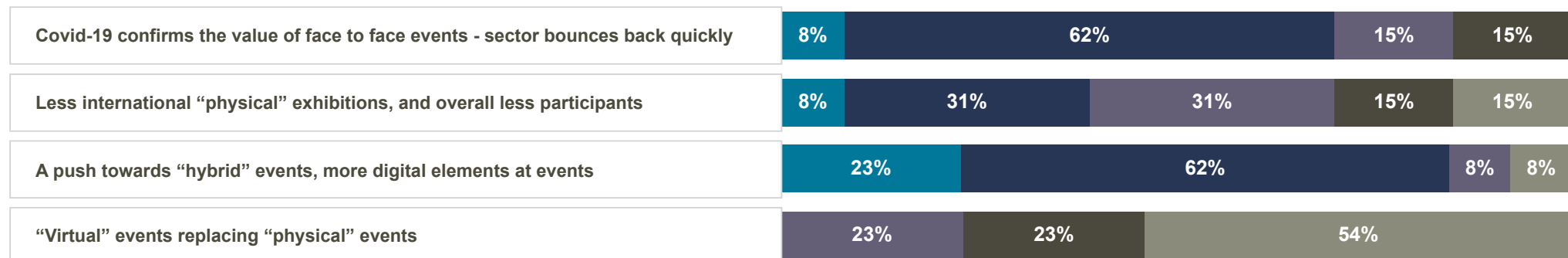
Spain

Global



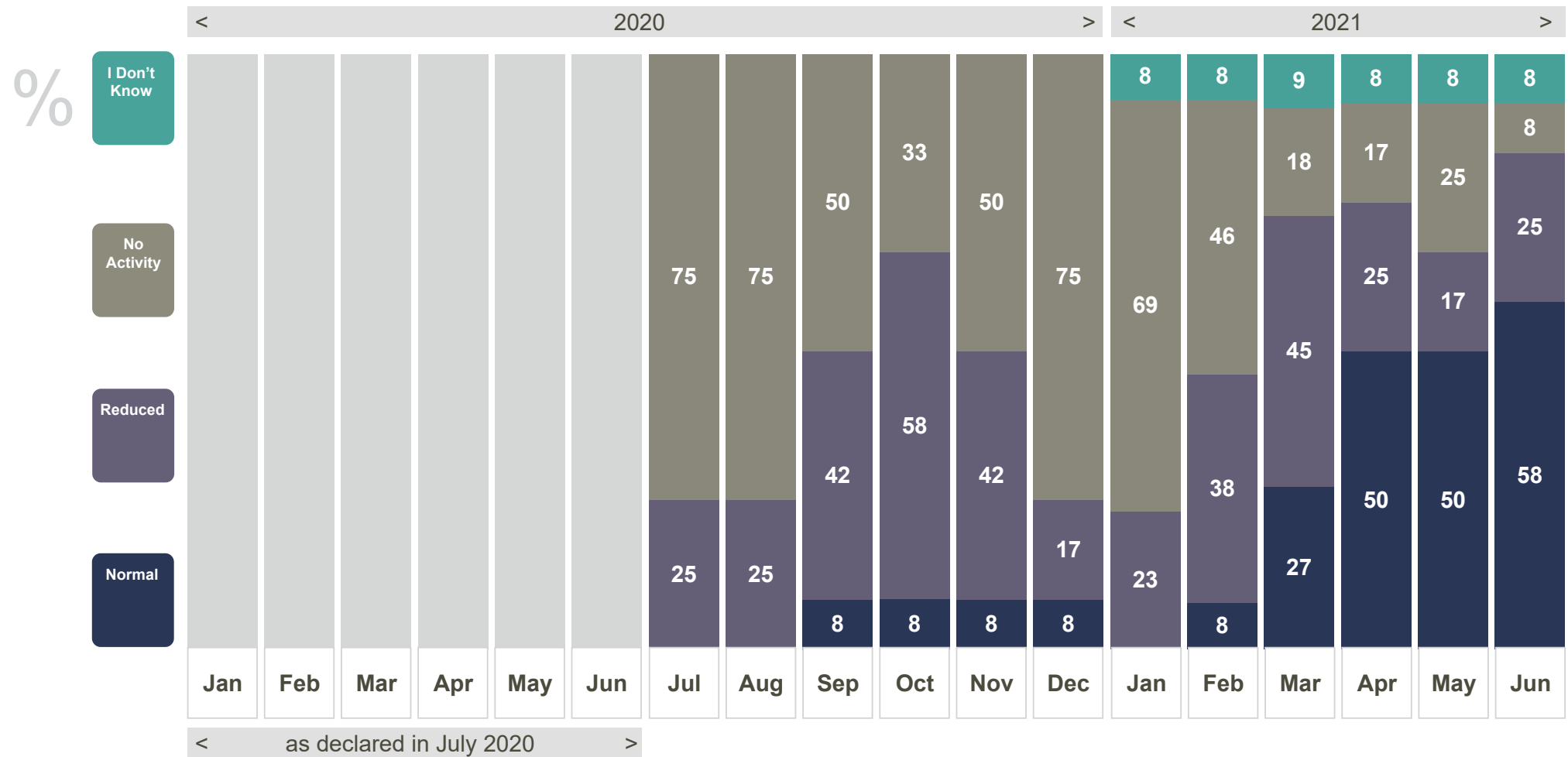
Format of exhibitions in the coming years

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



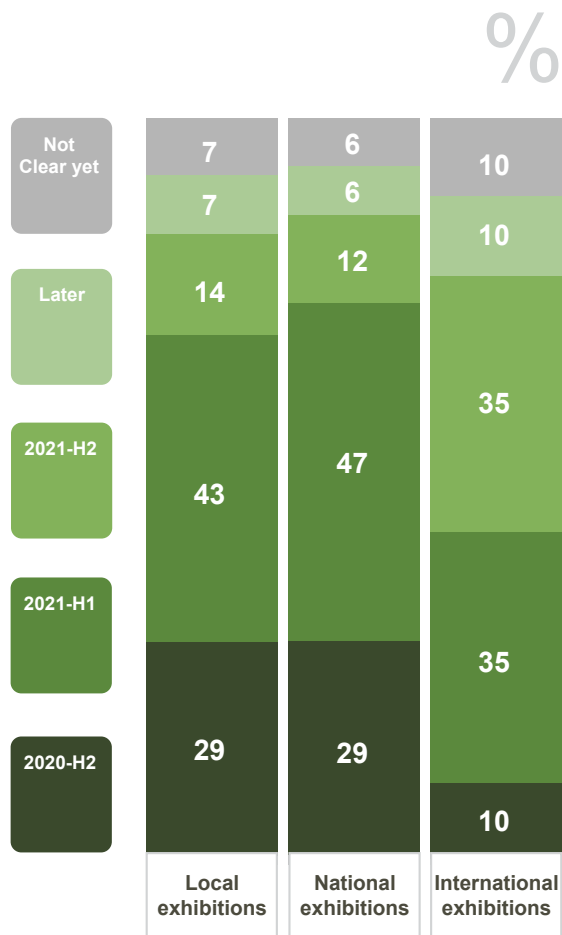


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

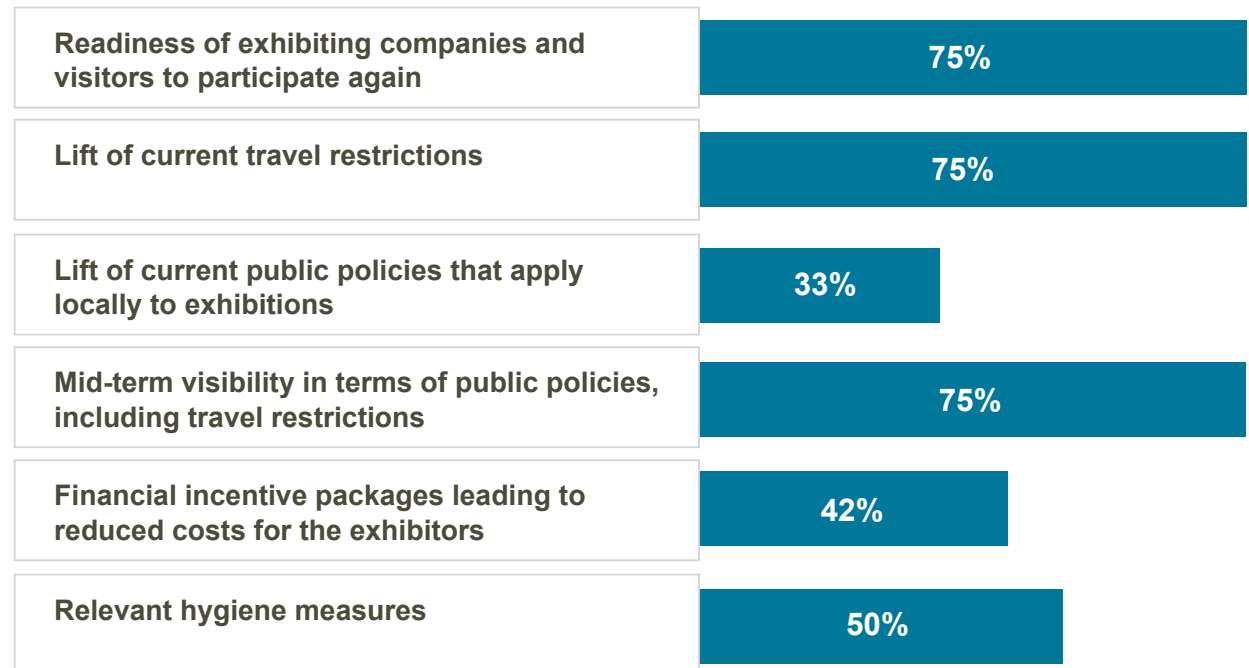




When do you believe exhibitions will open again in your city?



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

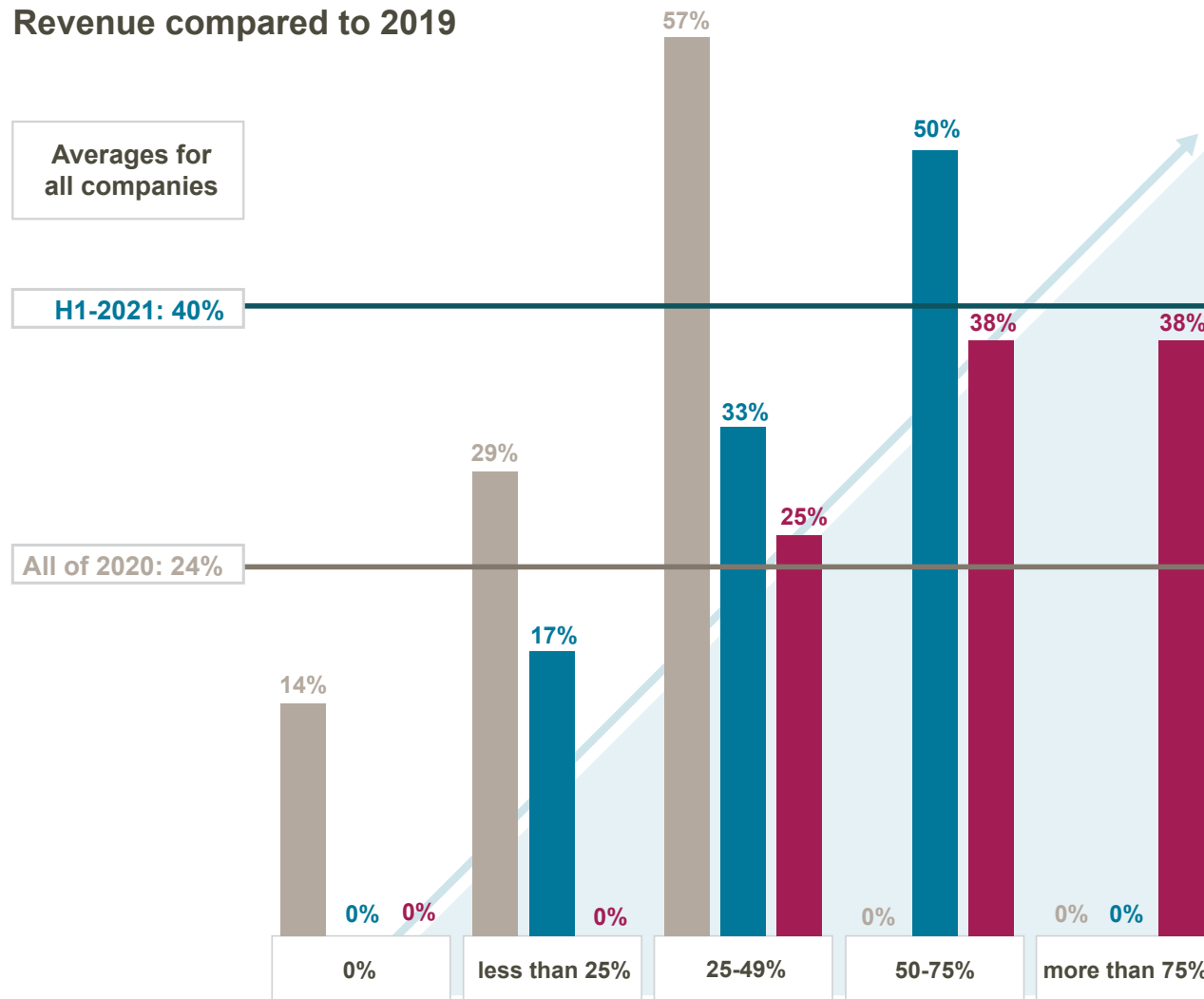


Detailed results for Turkey

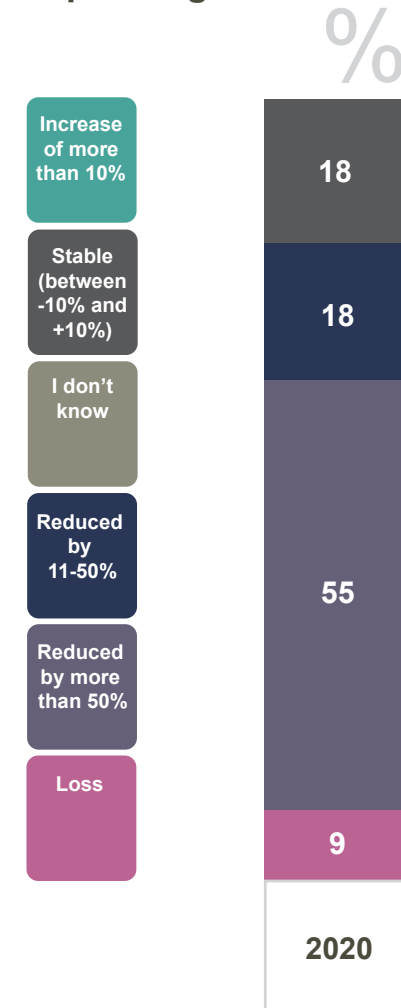


All of 2021: 71%

Revenue compared to 2019



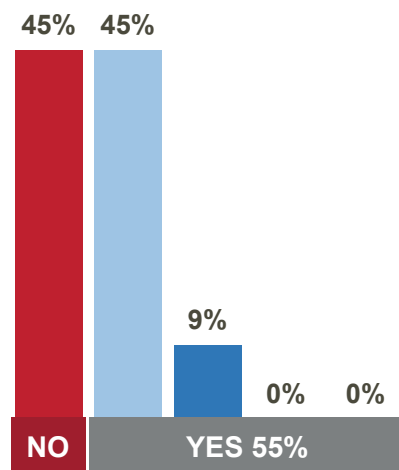
Operating Profits



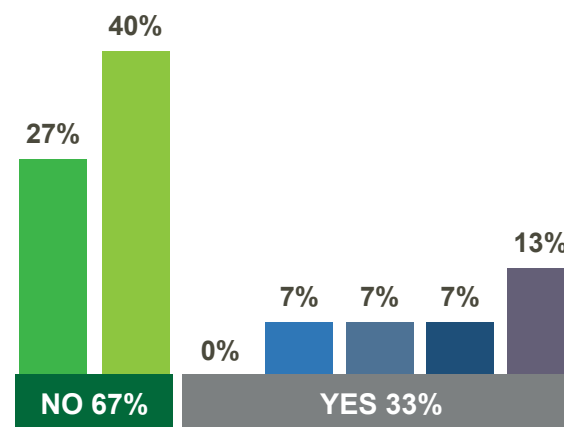
Detailed results for Turkey



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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

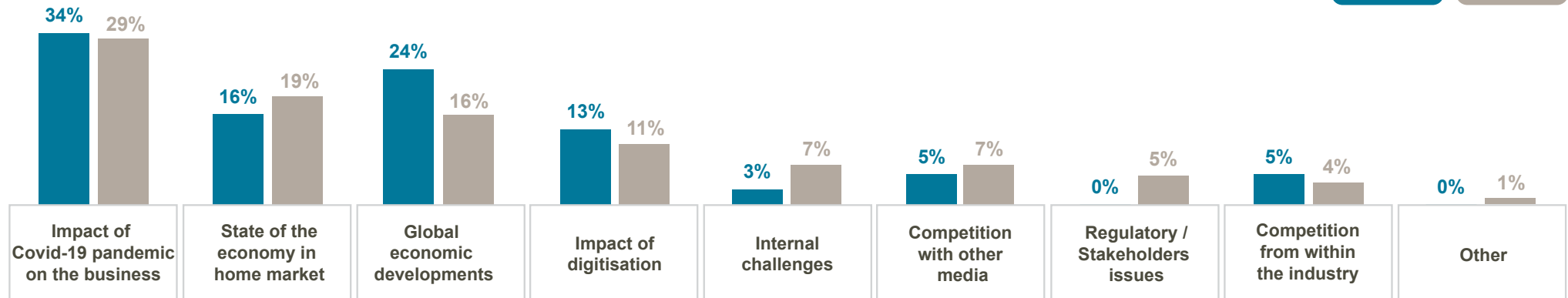
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down



Most important business issues in the exhibition industry

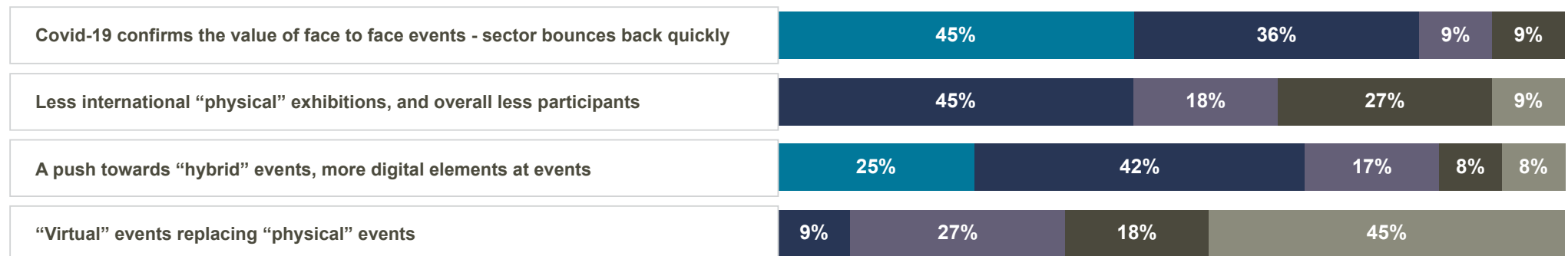
Turkey

Global



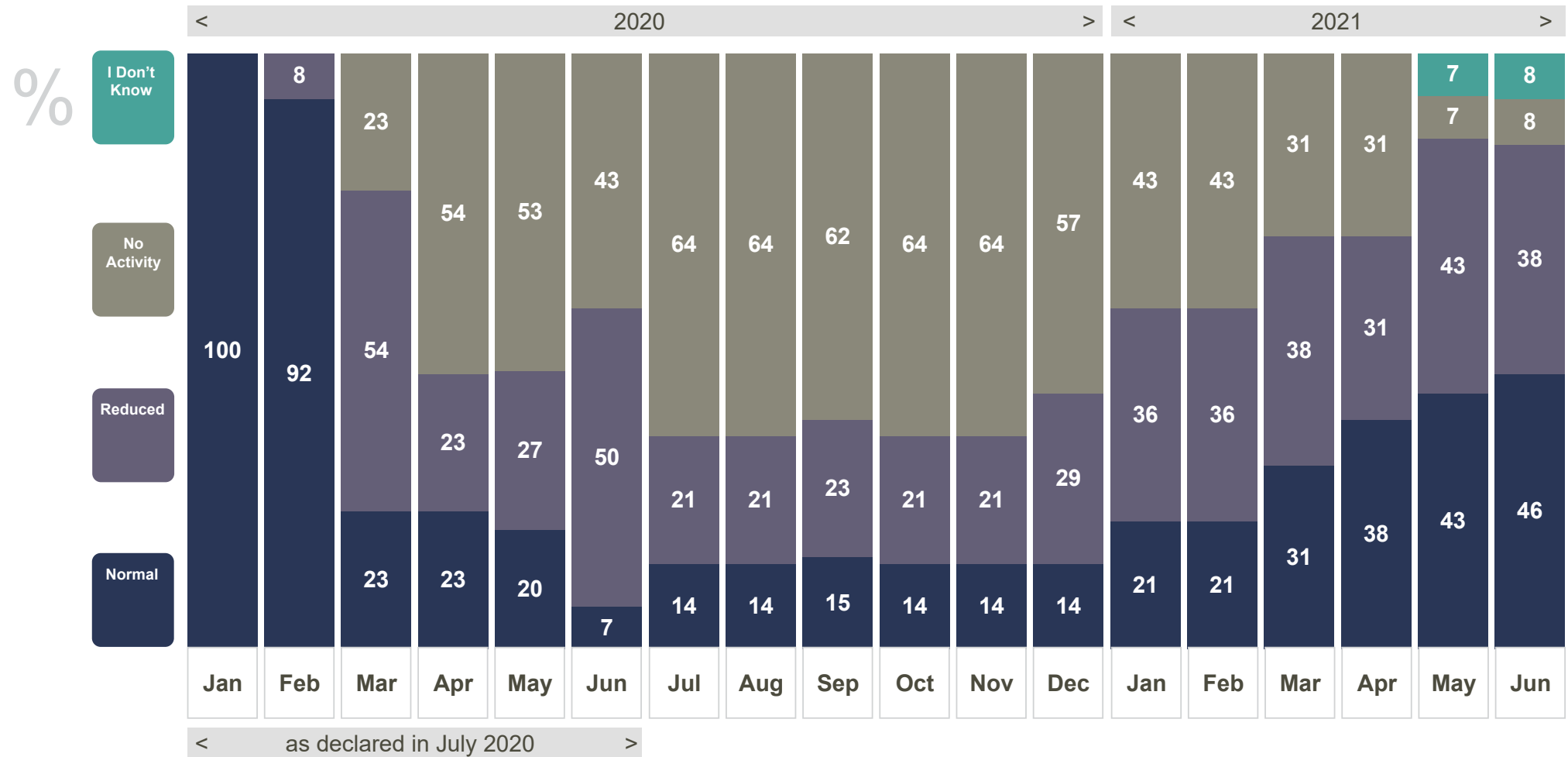
Format of exhibitions in the coming years

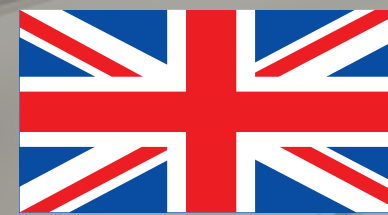
Yes, for sure Most probably Not sure Not sure at all Definitely not



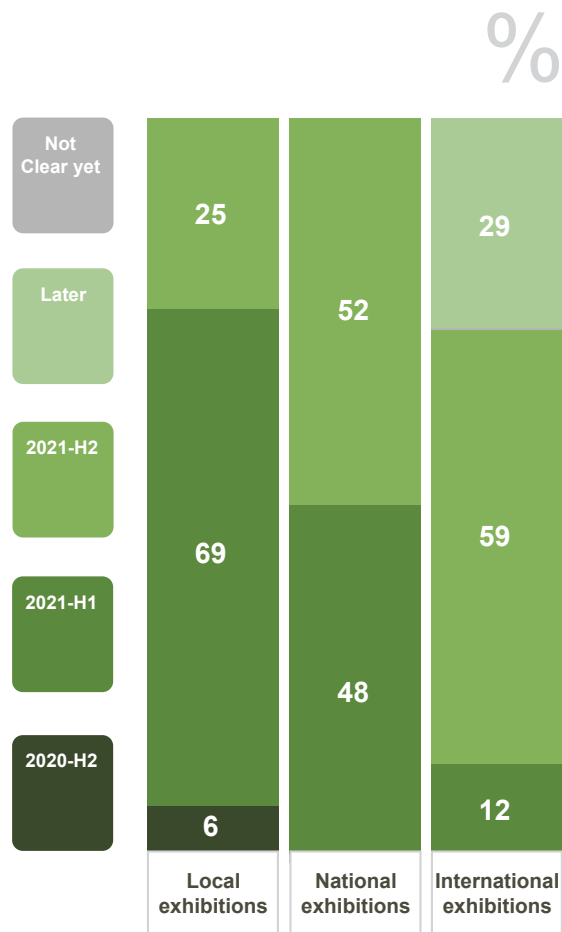


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

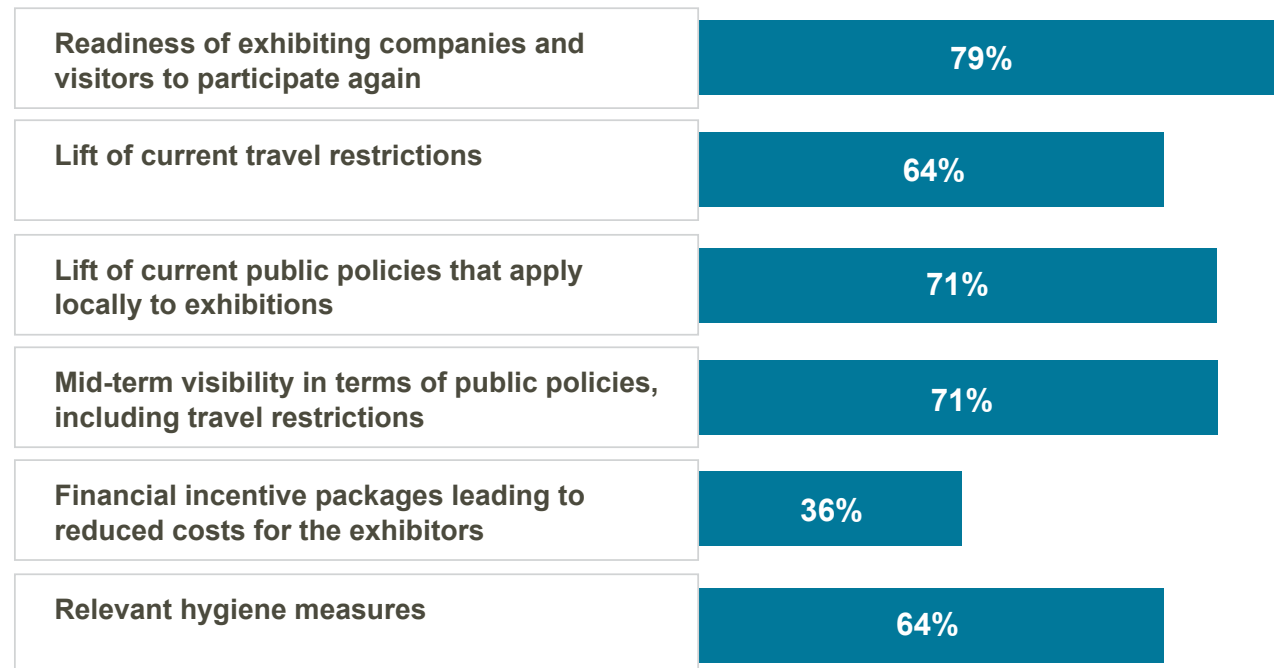




When do you believe exhibitions will open again in your city?



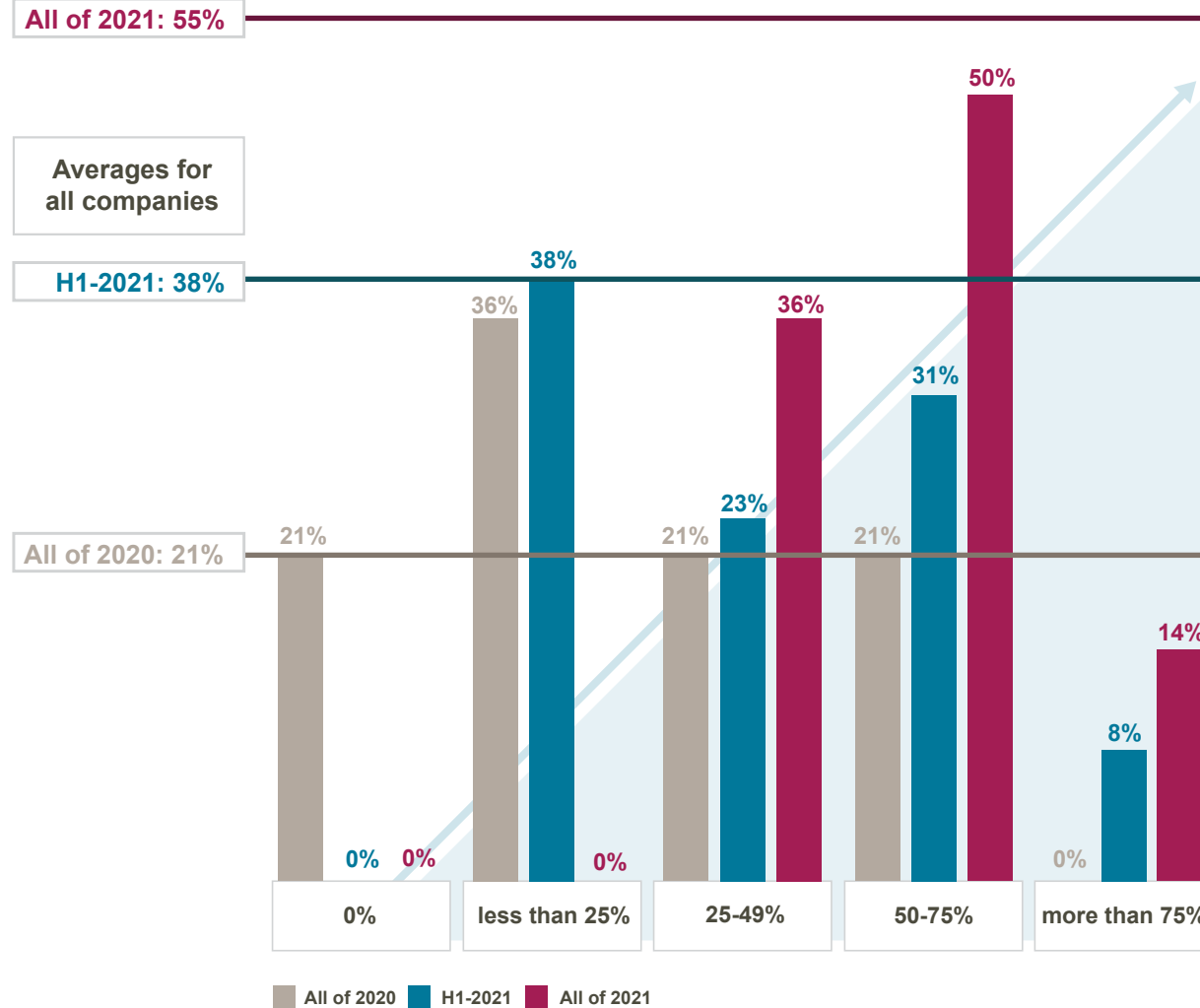
What do you believe would most help the “bounce back” of exhibitions?



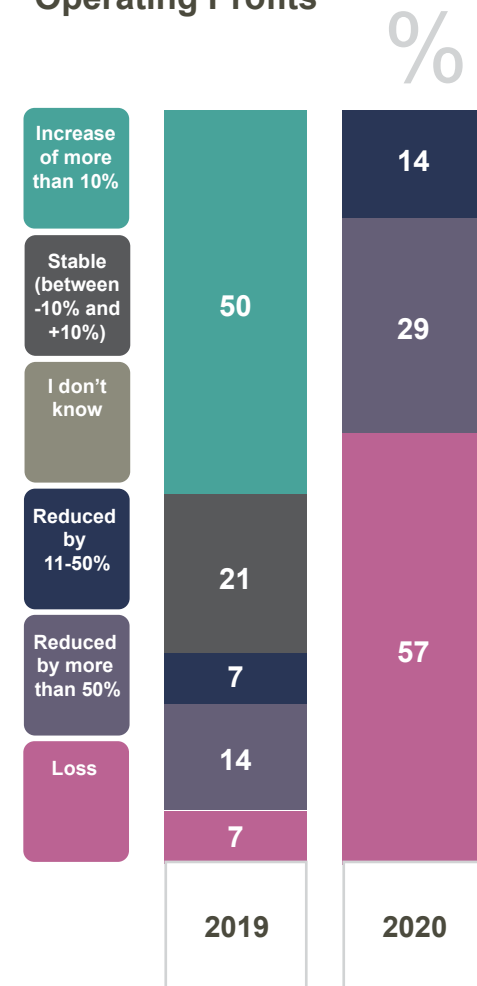
Detailed results for UK

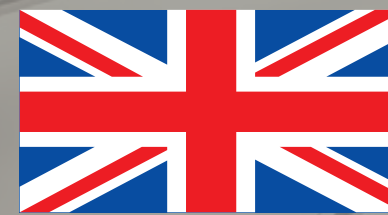


Revenue compared to 2019

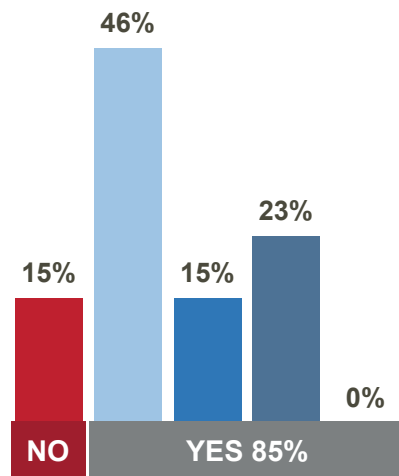


Operating Profits

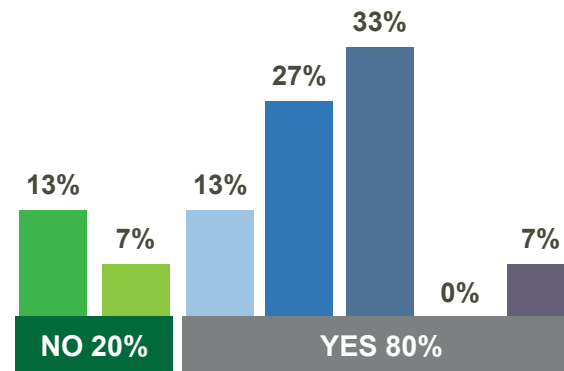




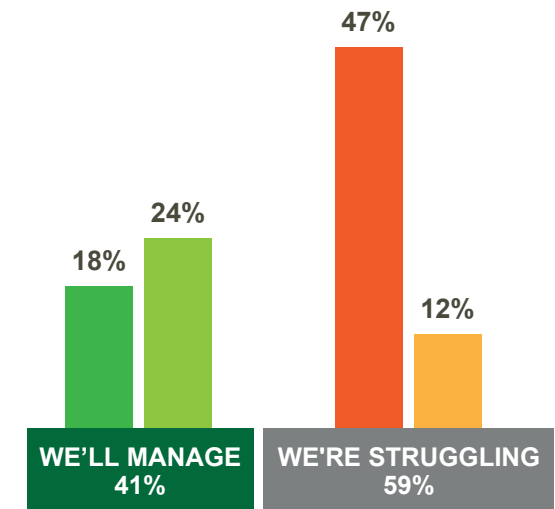
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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- Yes, for more than 50% of our 2019 overall costs

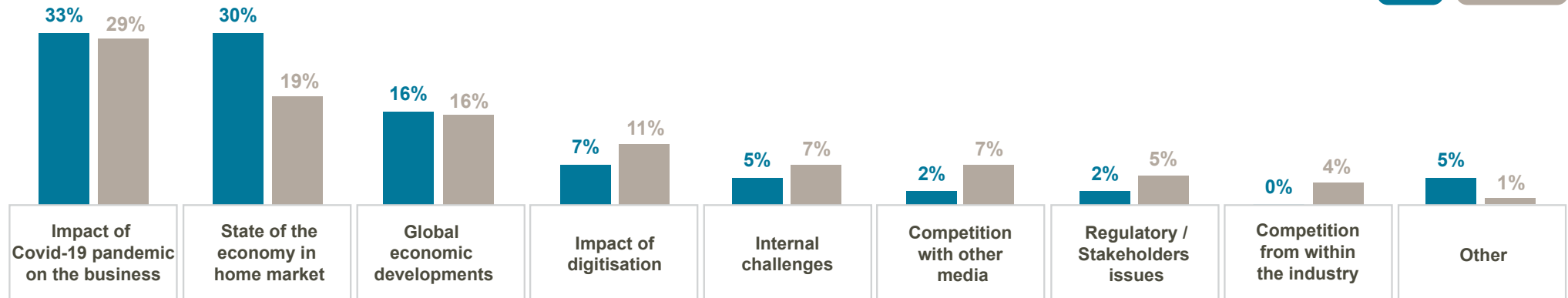
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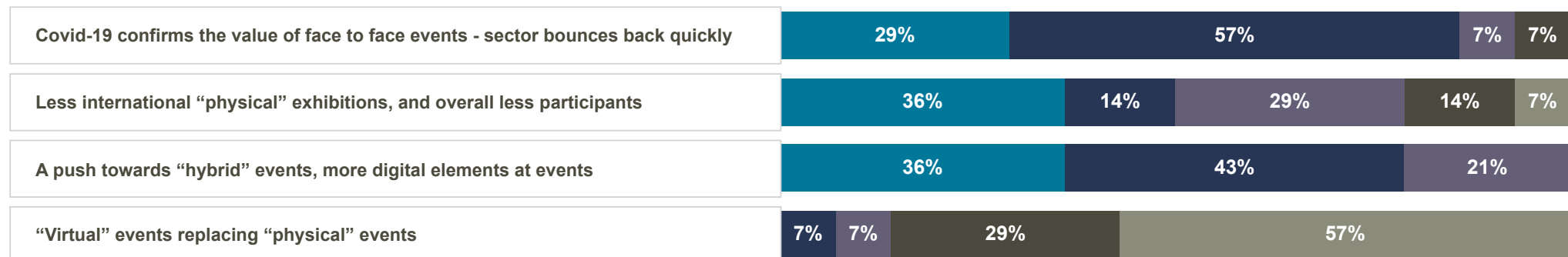
Most important business issues in the exhibition industry

UK Global



Format of exhibitions in the coming years

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



Middle East - Africa



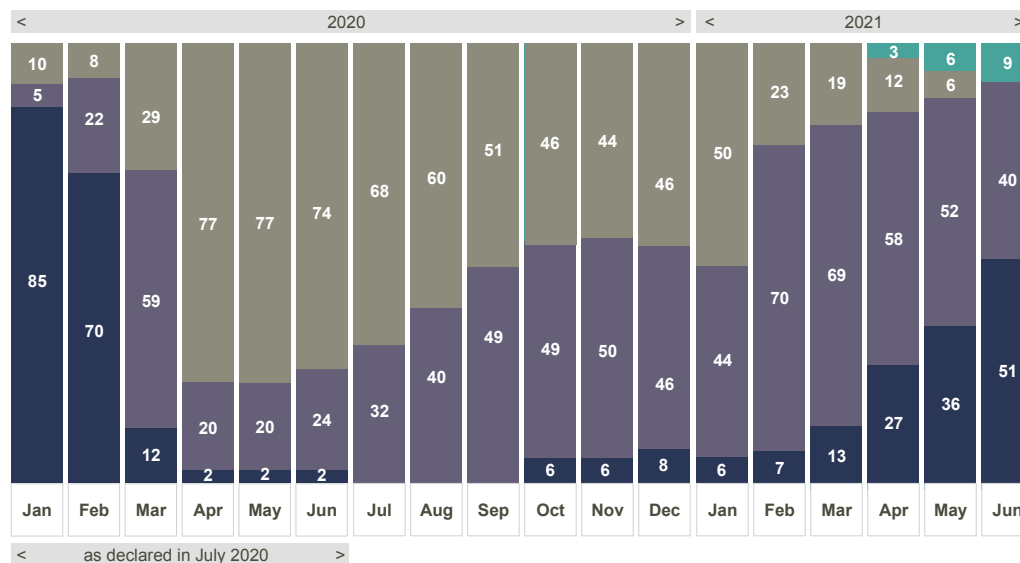
Operations - Reopening Exhibitions Middle East - Africa



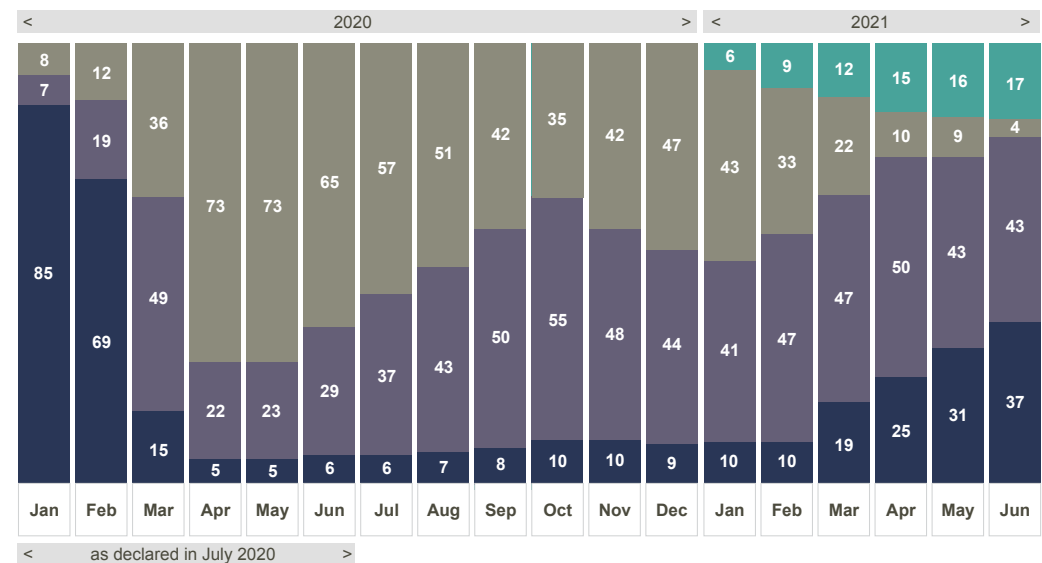
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



Middle East - Africa

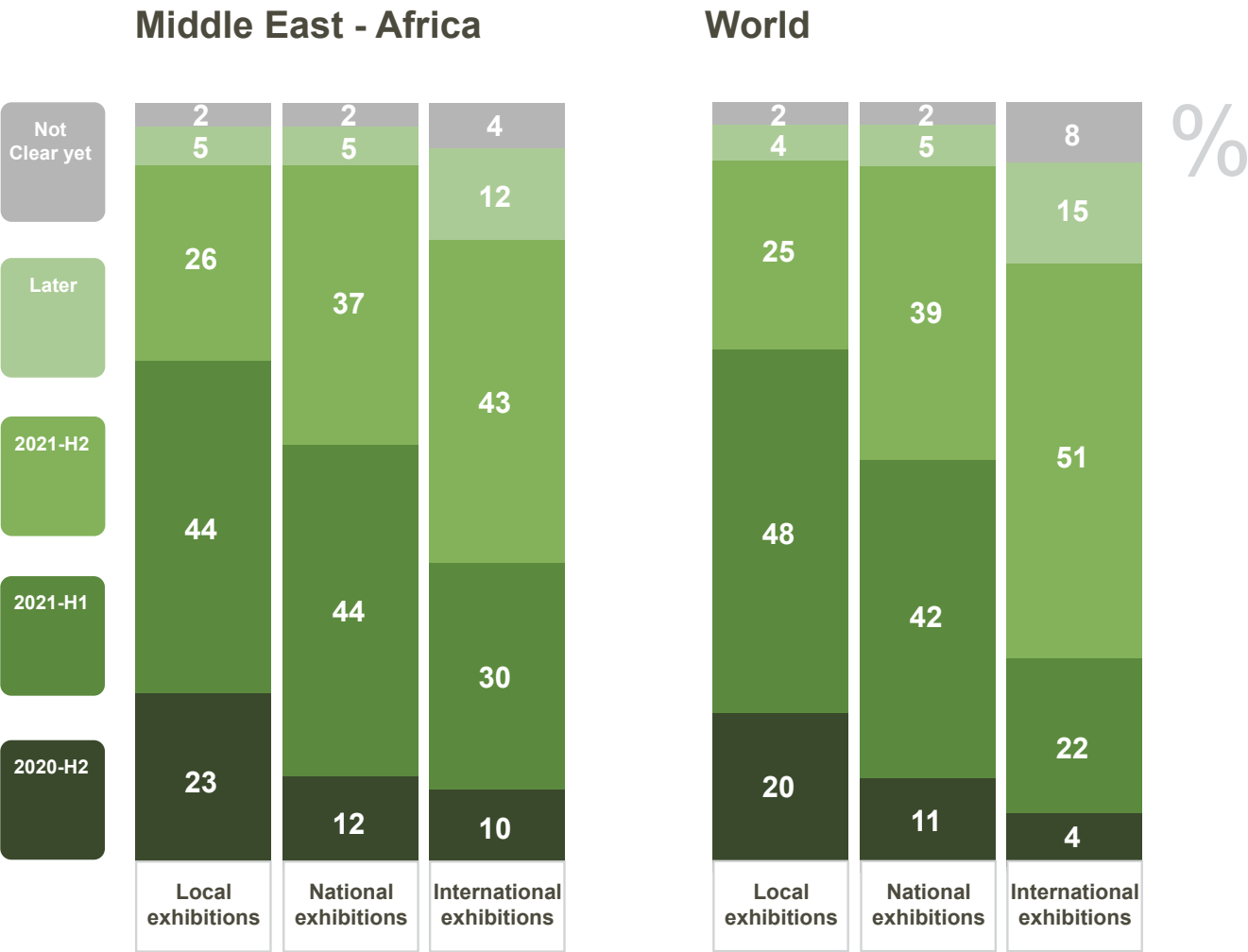


World





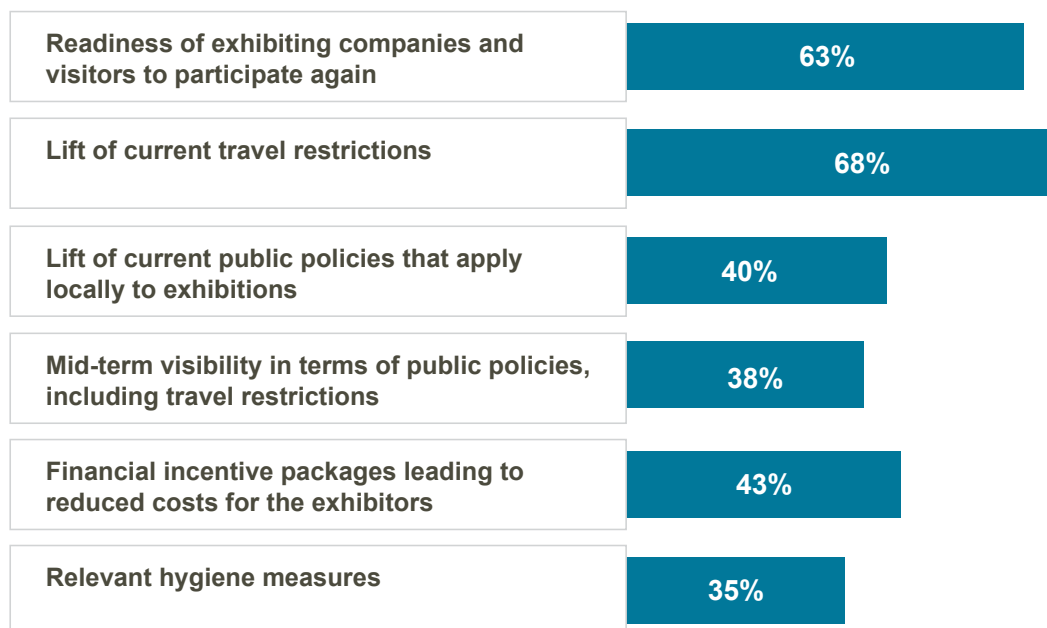
When do you believe exhibitions
will open again in your city?



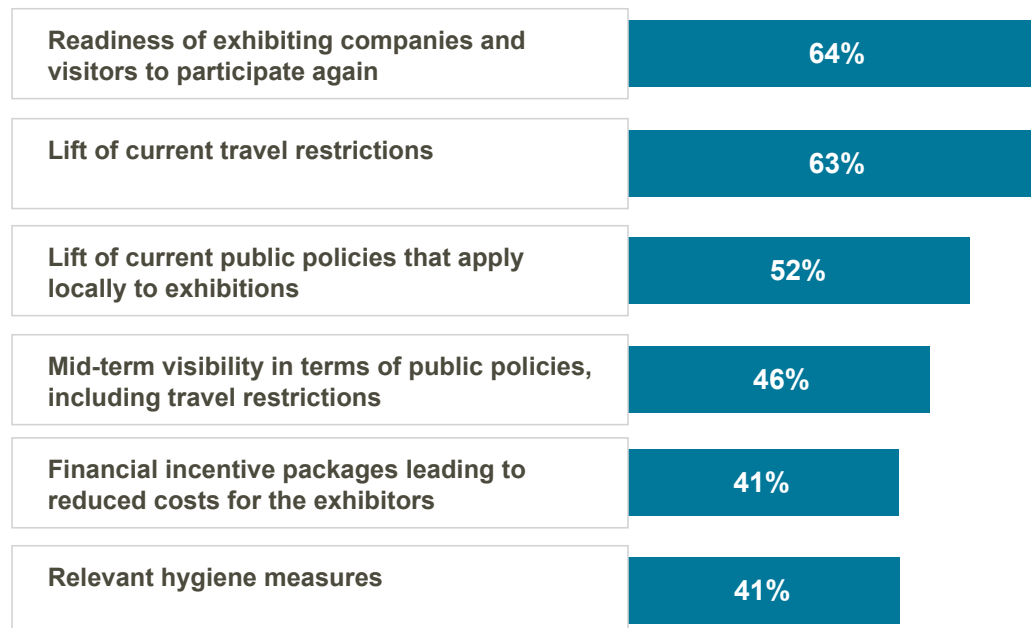


What do you believe would most help the “bounce back” of exhibitions?

Middle East - Africa

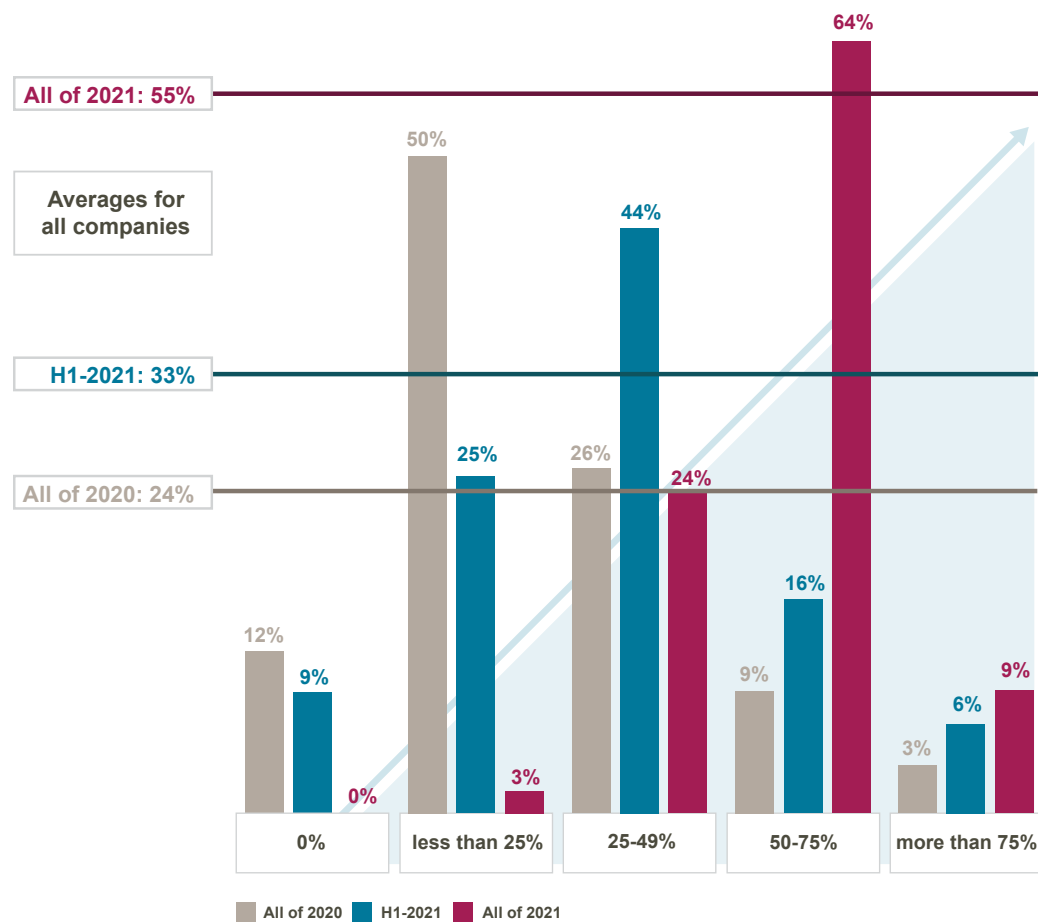


World

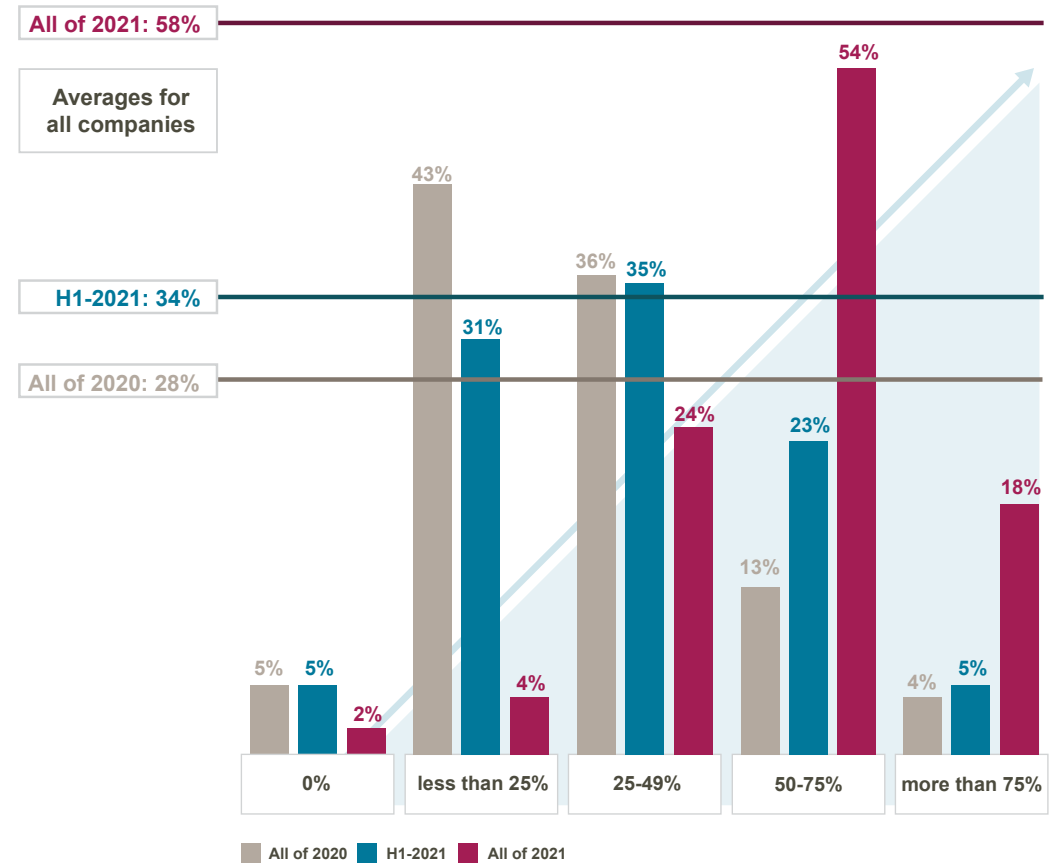


Revenue compared to last year (2019)

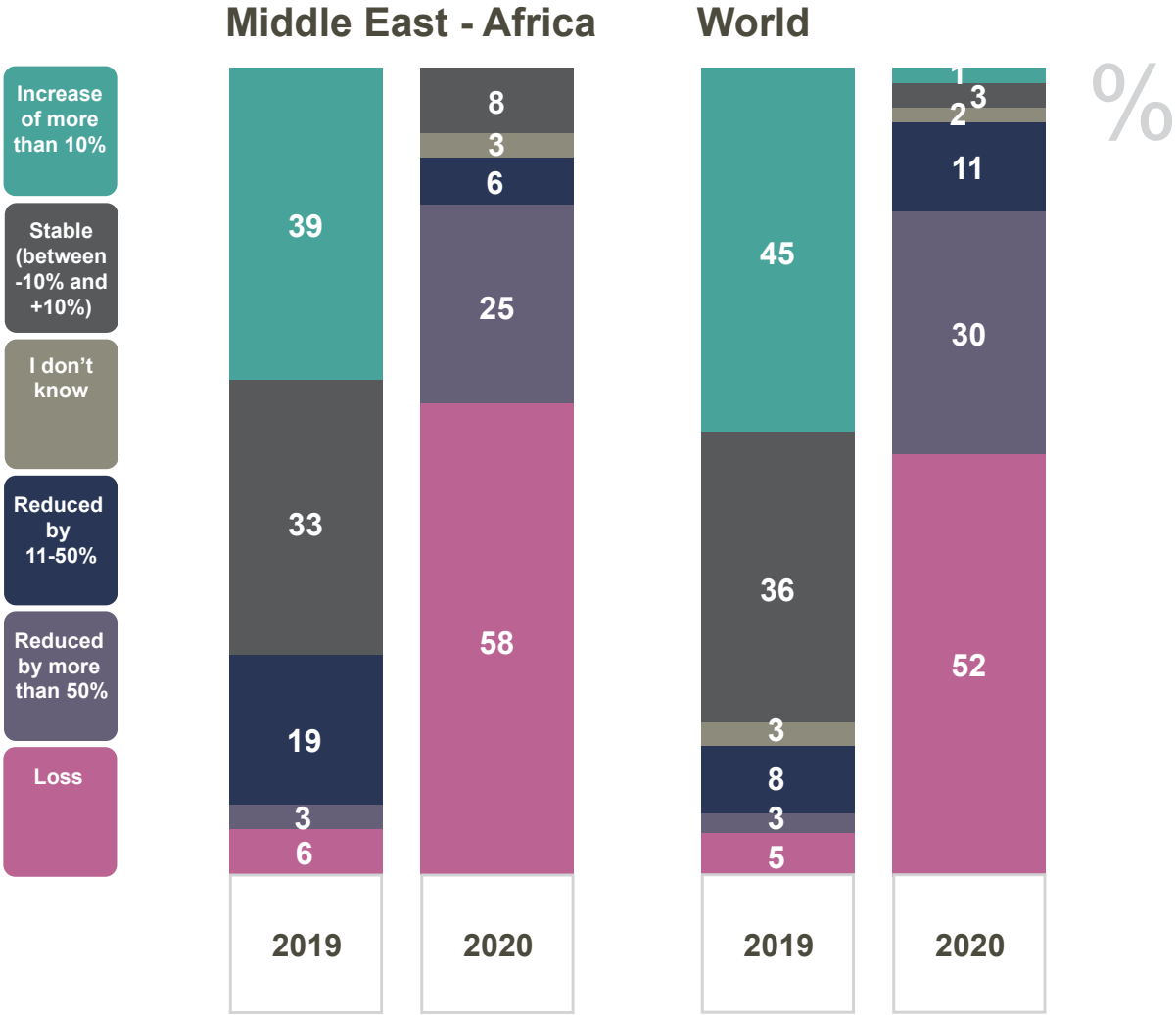
Middle East - Africa



World



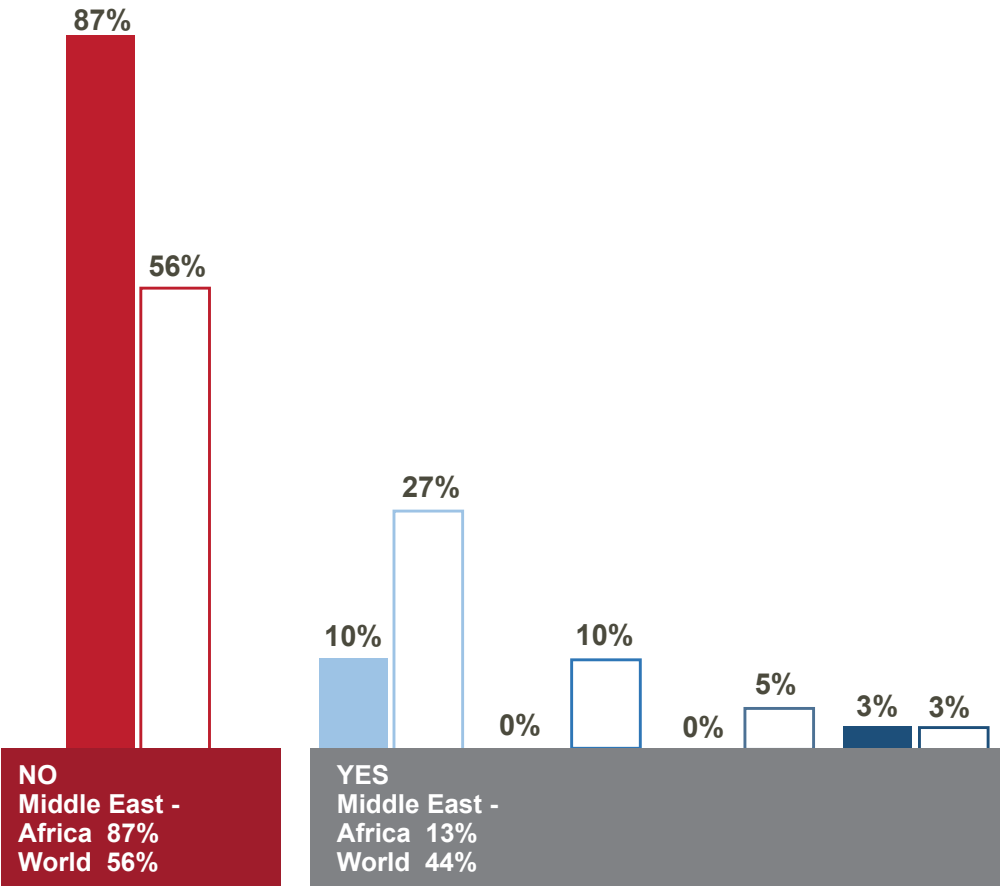
Operating profits Middle East - Africa



Did your company benefit from public financial support?

Middle East - Africa World

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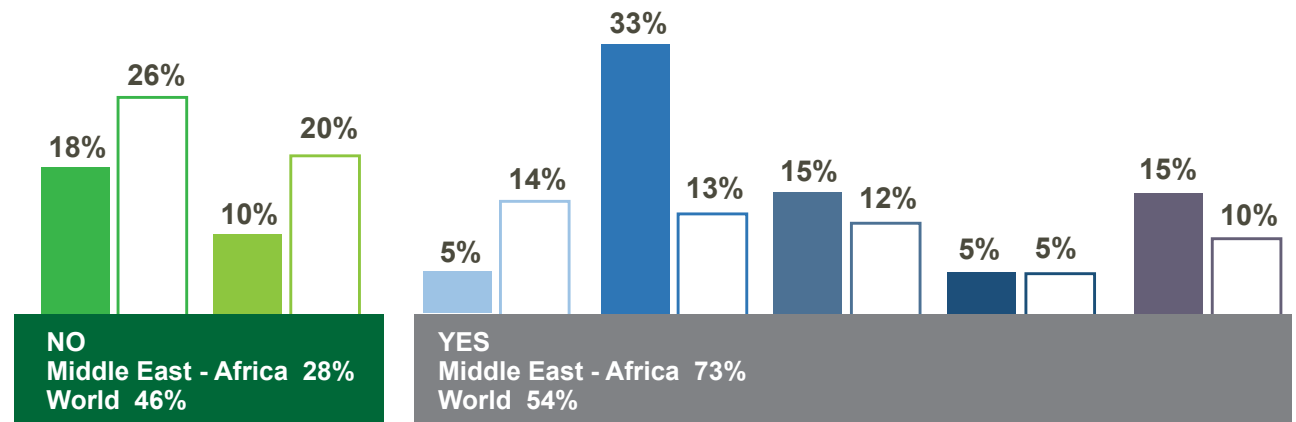


Have you had to reduce your workforce?

Middle East - Africa

World

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

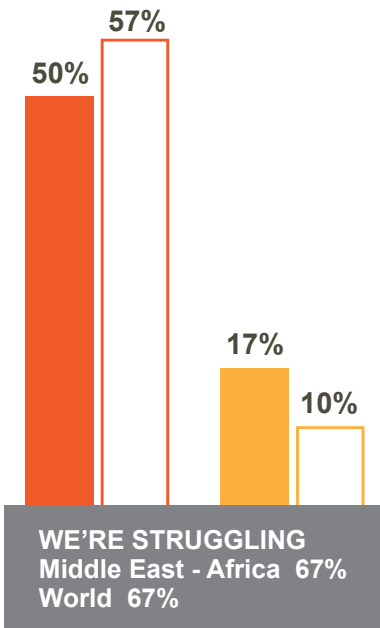
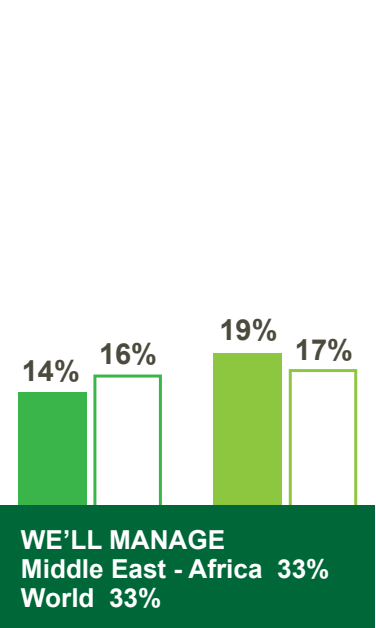


If there is no business for the next 6 months,
which best applies?

Middle East - Africa

World

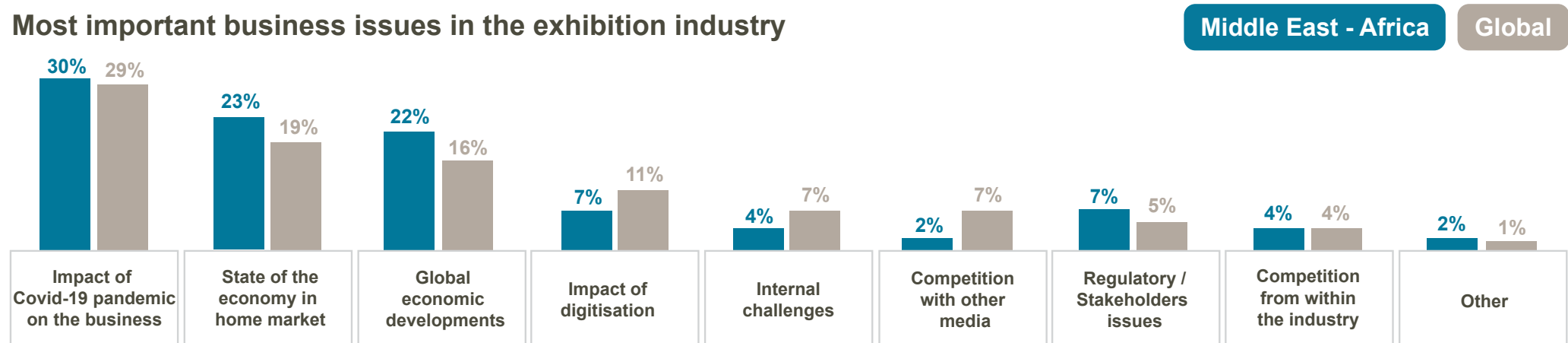
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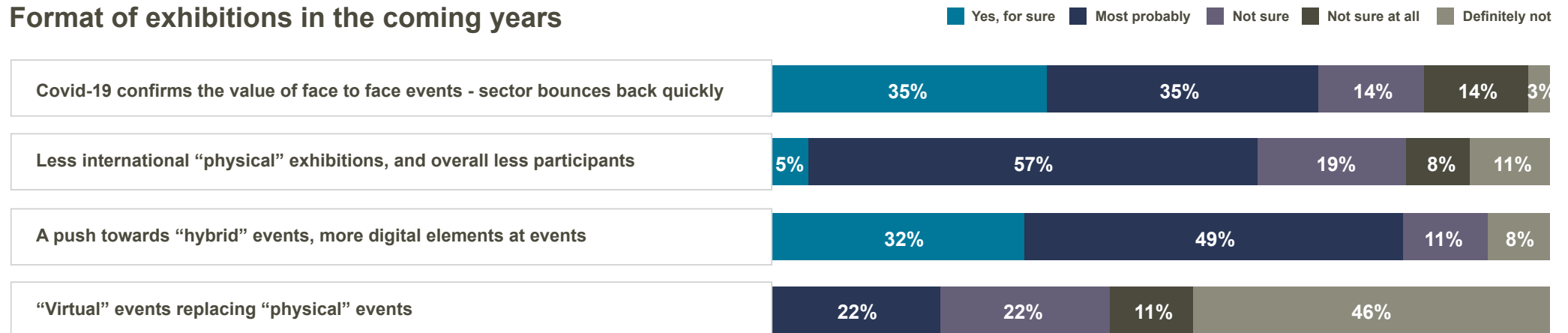
Most Important Business Issues - Format of Exhibitions - Middle East - Africa



Most important business issues in the exhibition industry

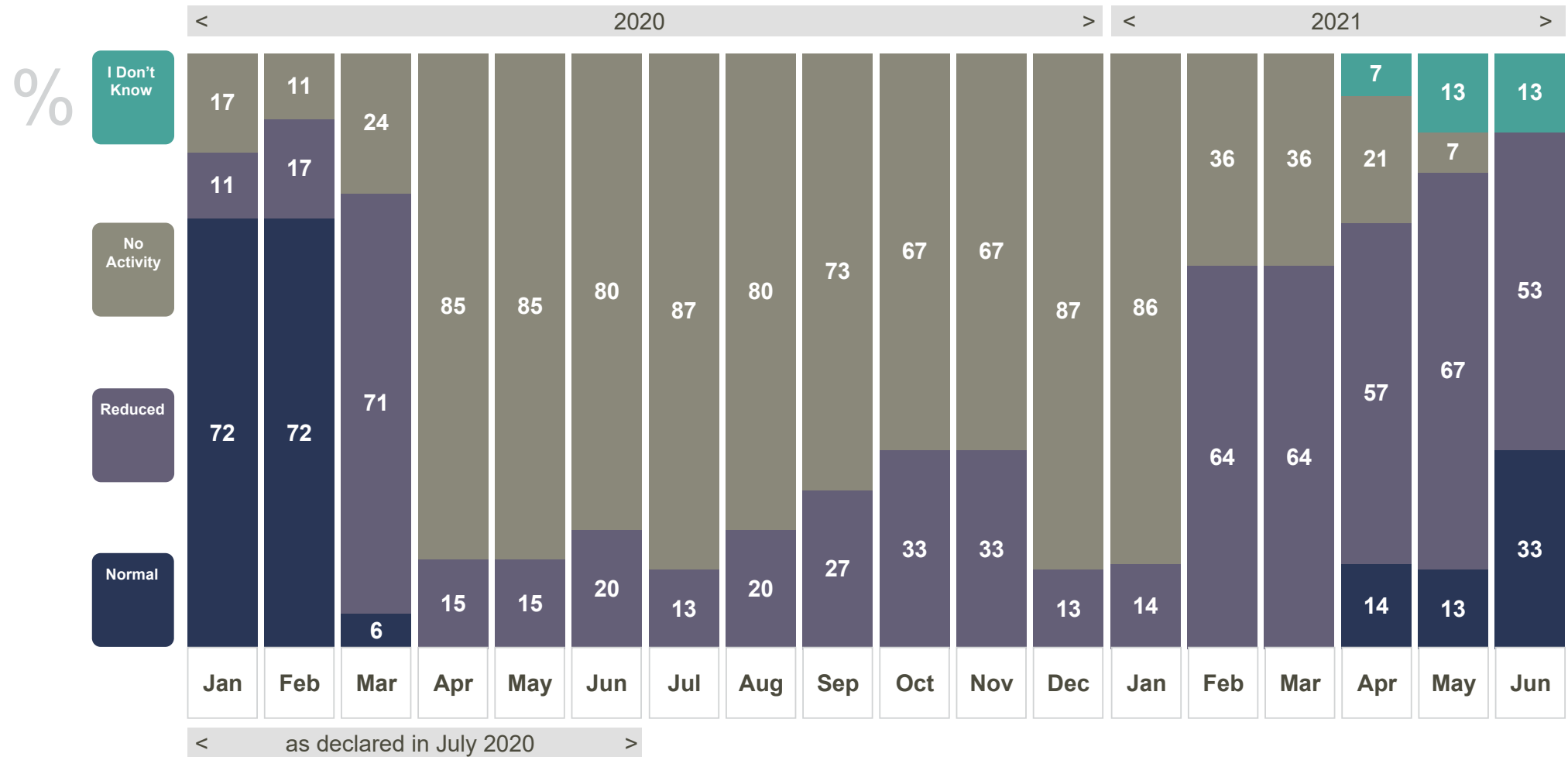


Format of exhibitions in the coming years





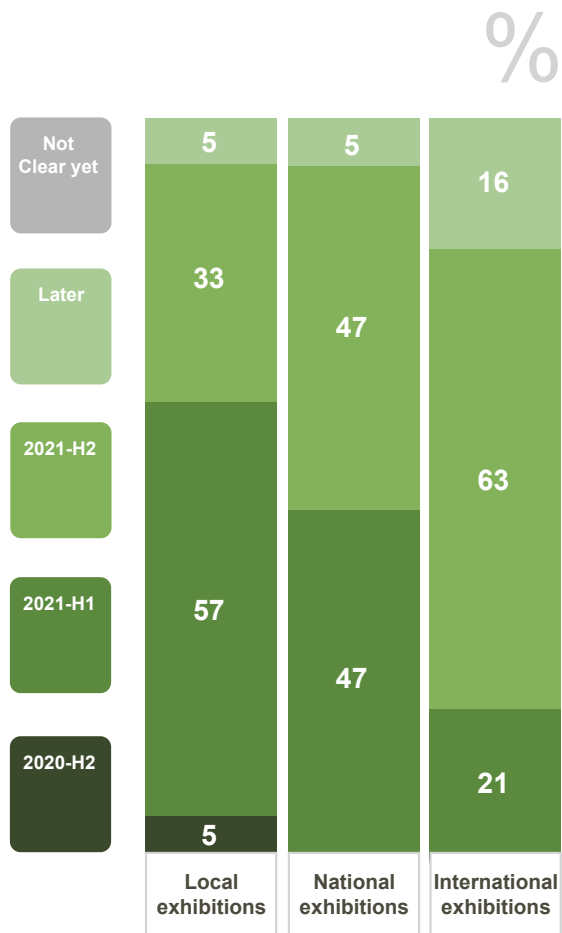
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



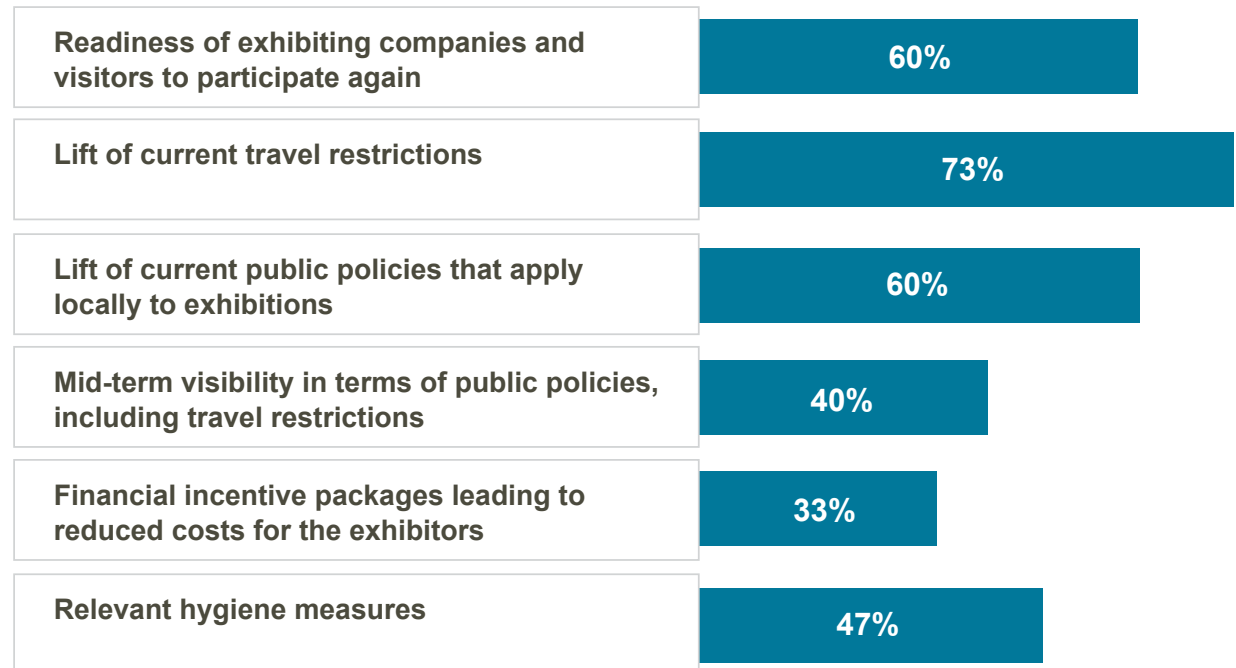
Detailed results for South Africa



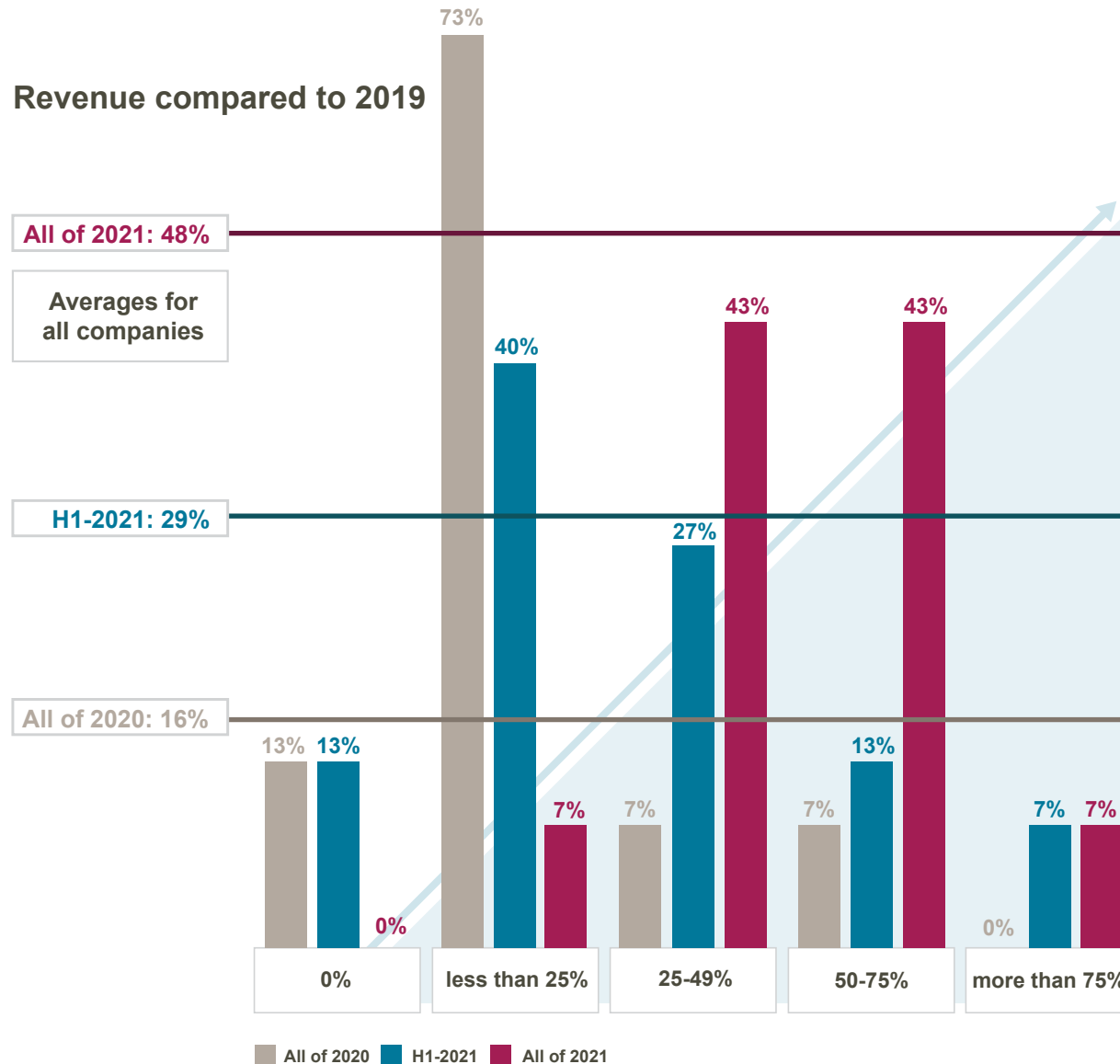
When do you believe exhibitions will open again in your city?



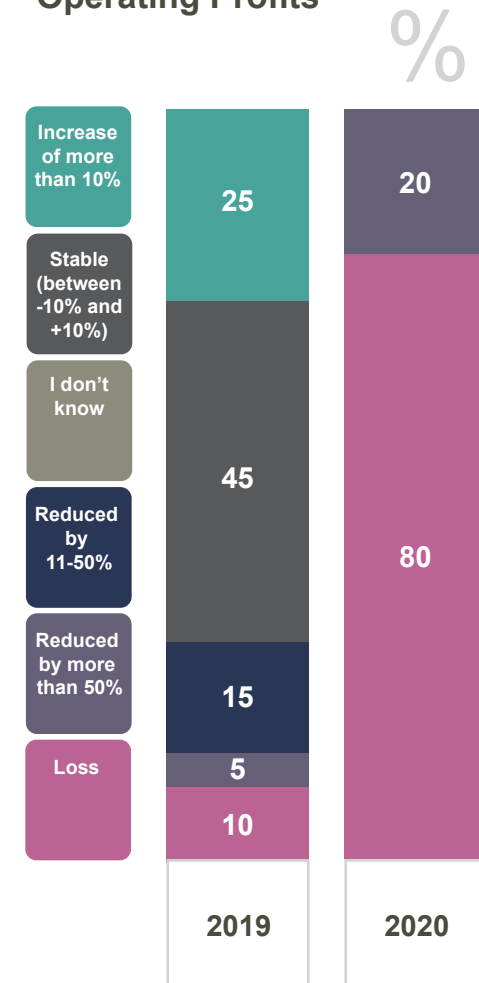
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for South Africa



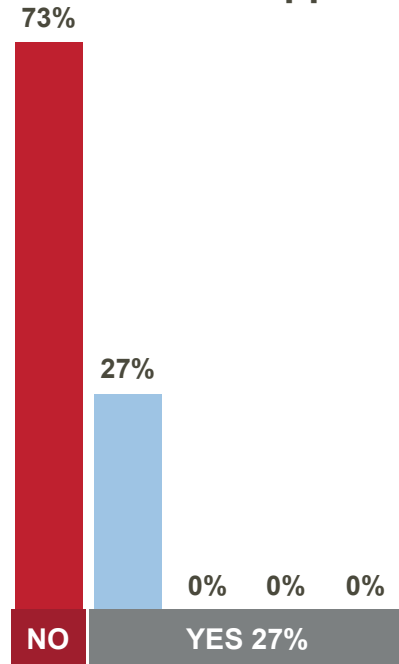
Operating Profits



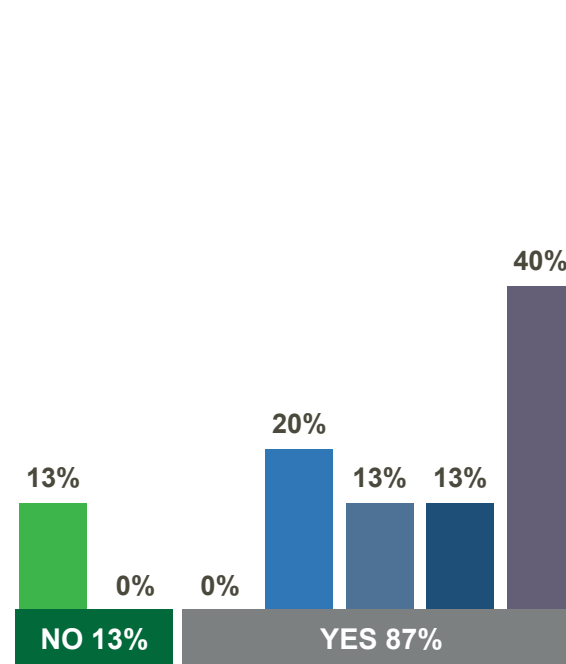
Detailed results for South Africa



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



- No
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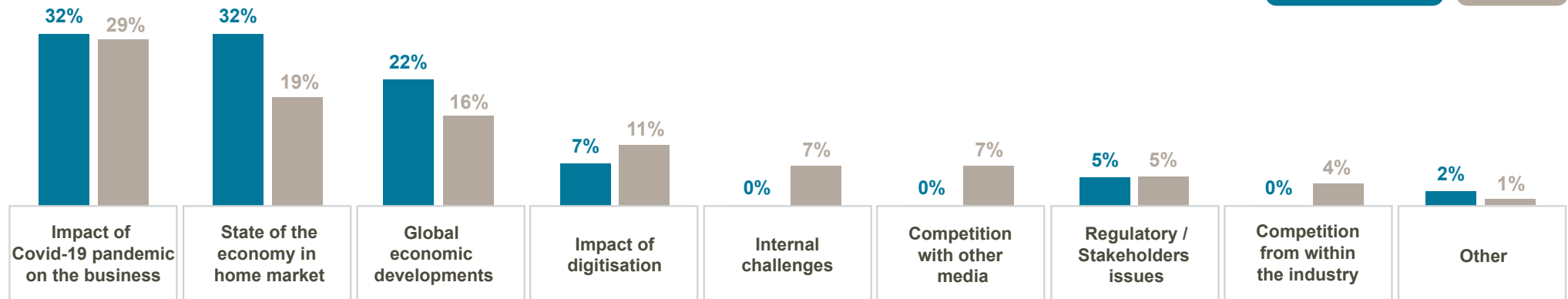
Detailed results for South Africa



Most important business issues in the exhibition industry

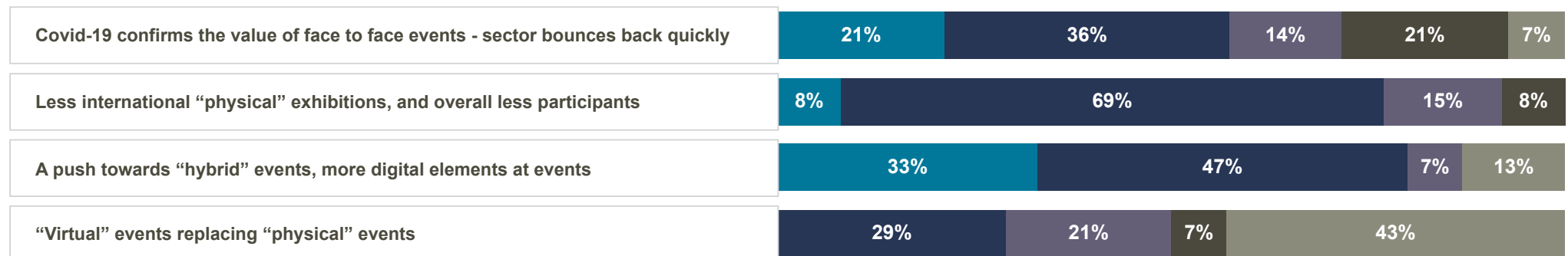
South Africa

Global



Format of exhibitions in the coming years

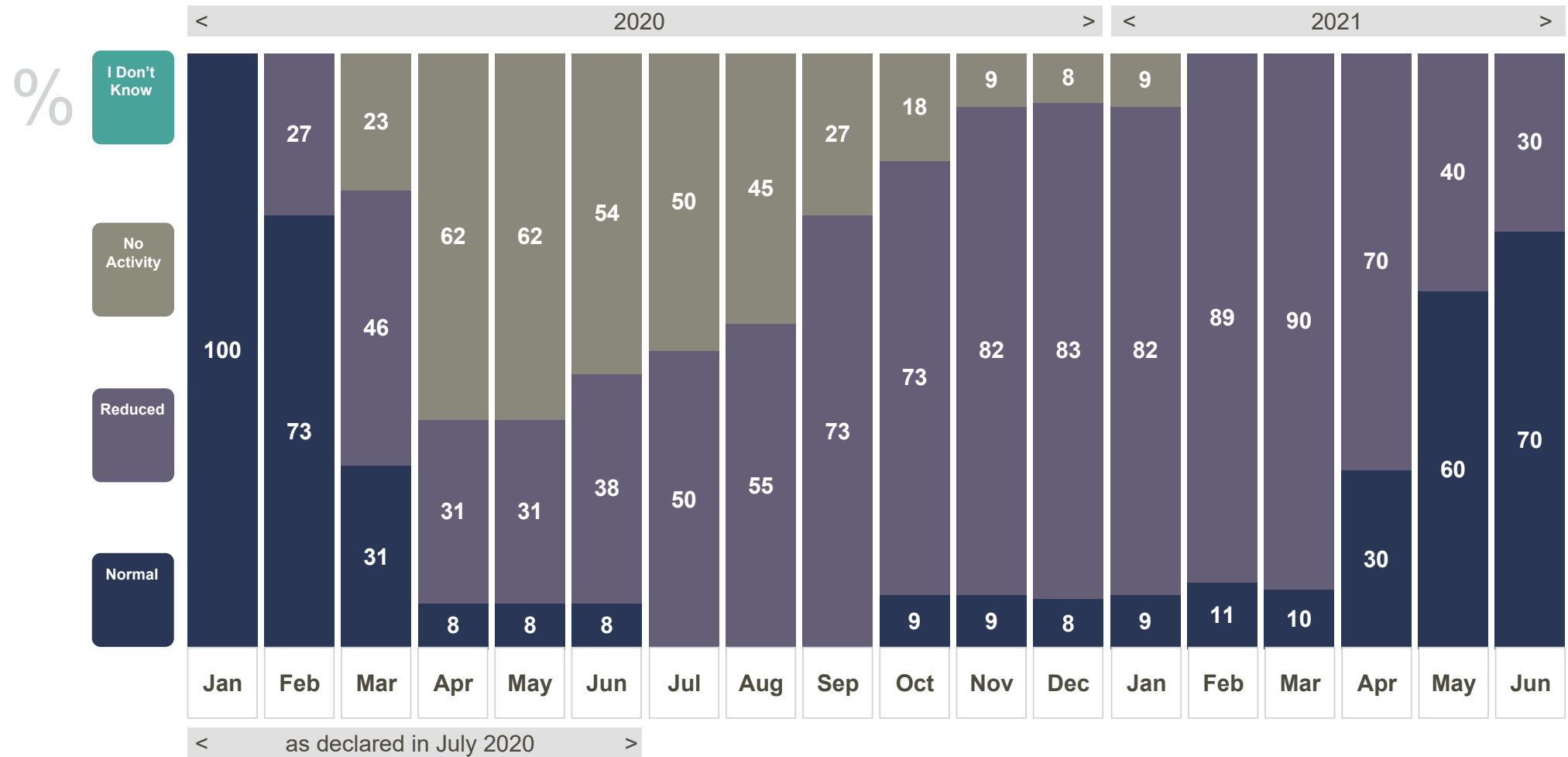
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for United Arab Emirates

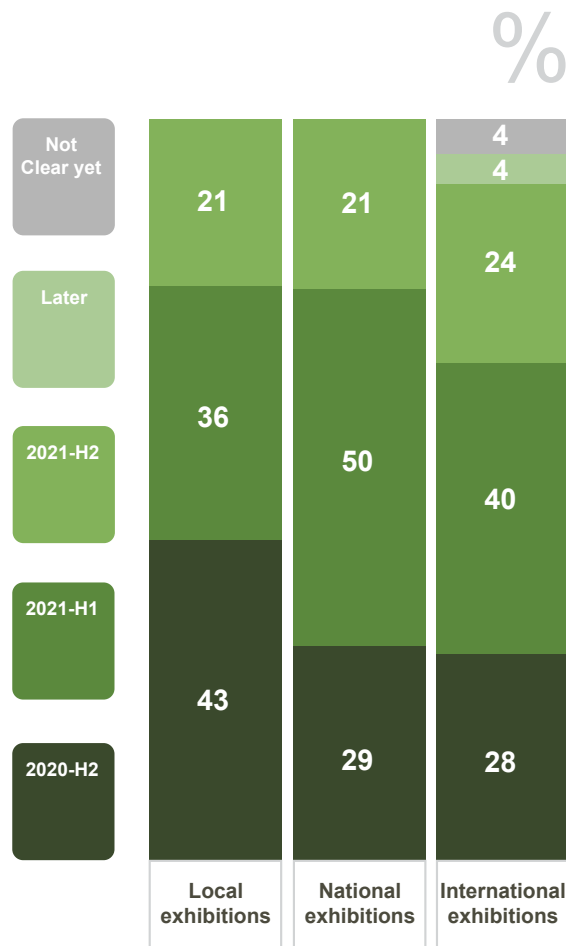


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

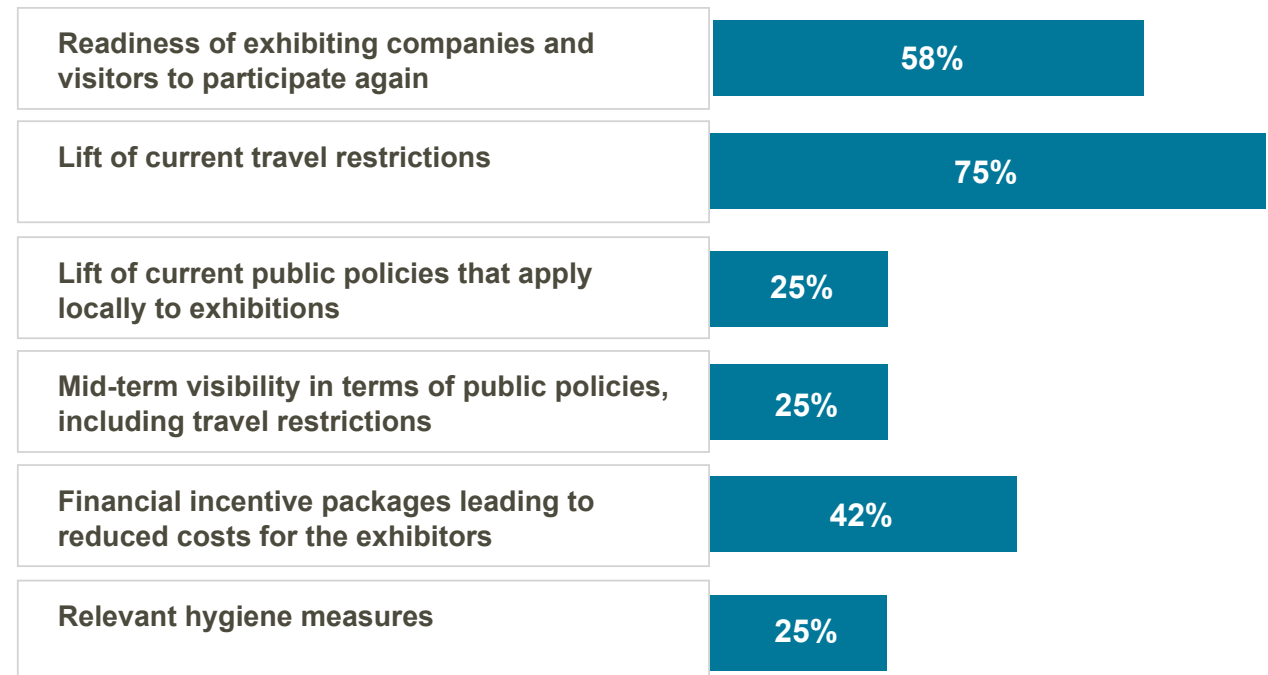




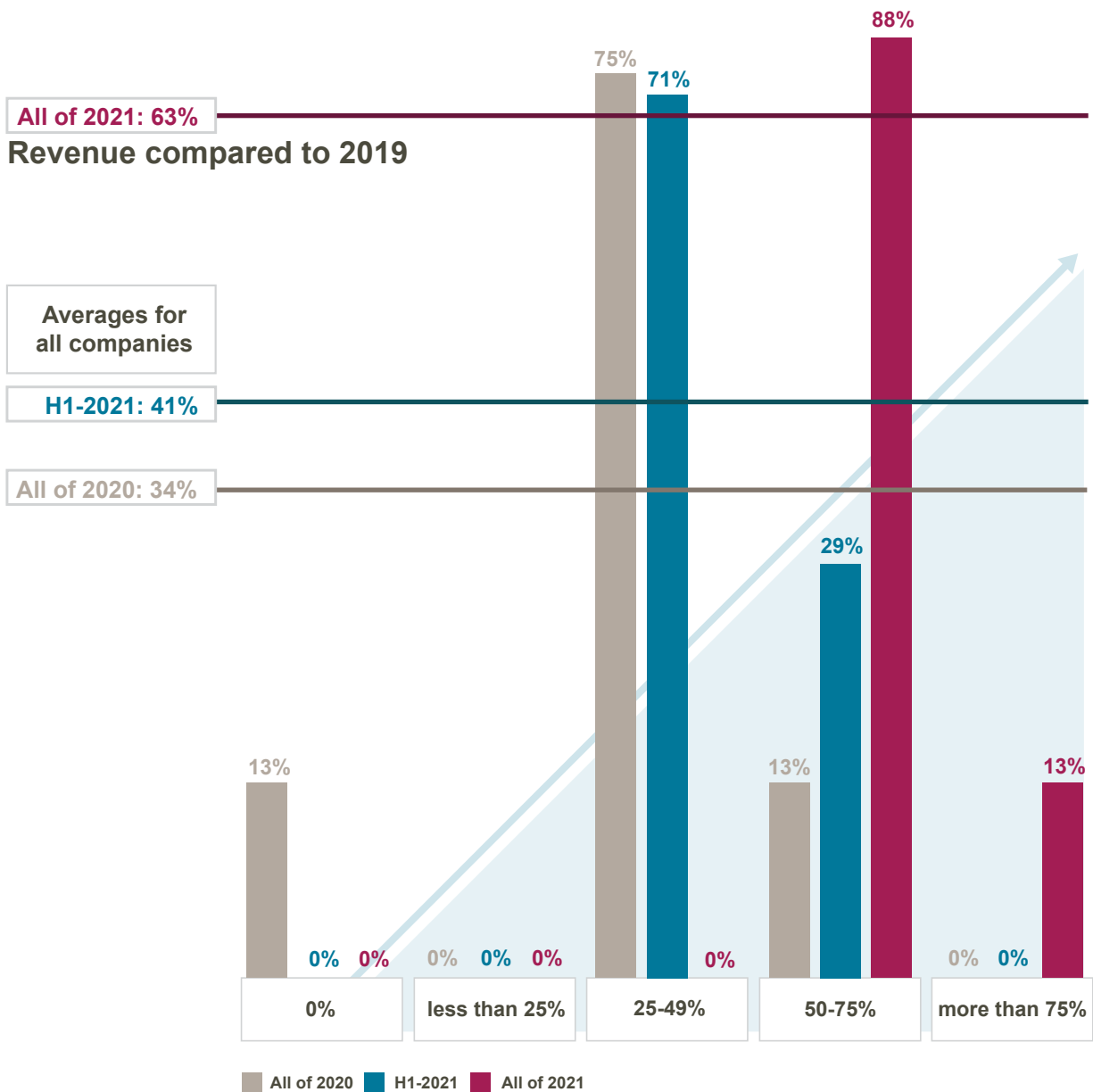
When do you believe exhibitions will open again in your city?



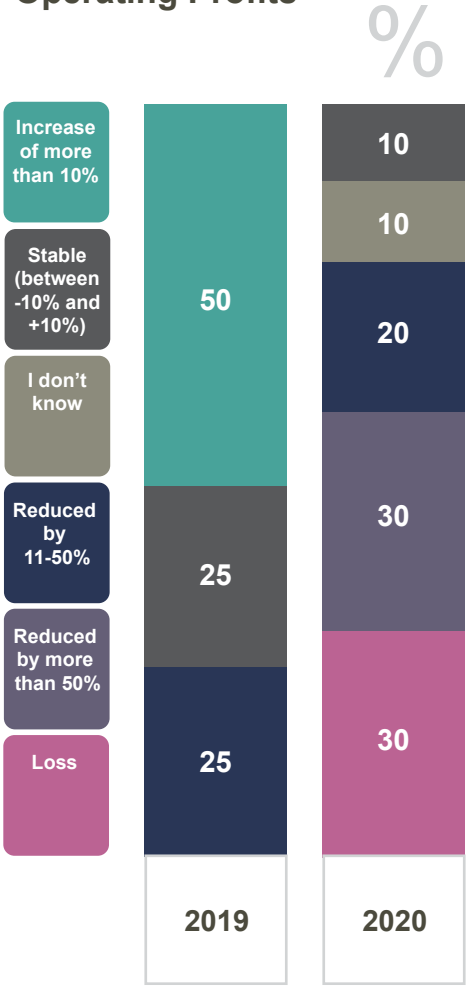
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for United Arab Emirates



Operating Profits



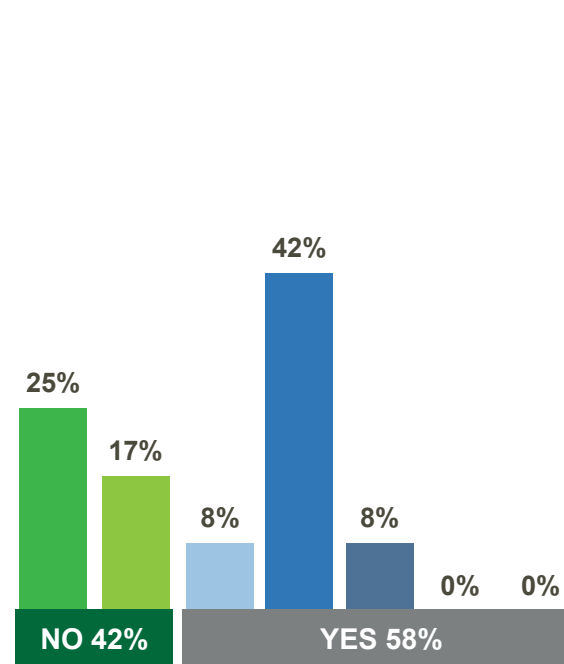
Detailed results for United Arab Emirates



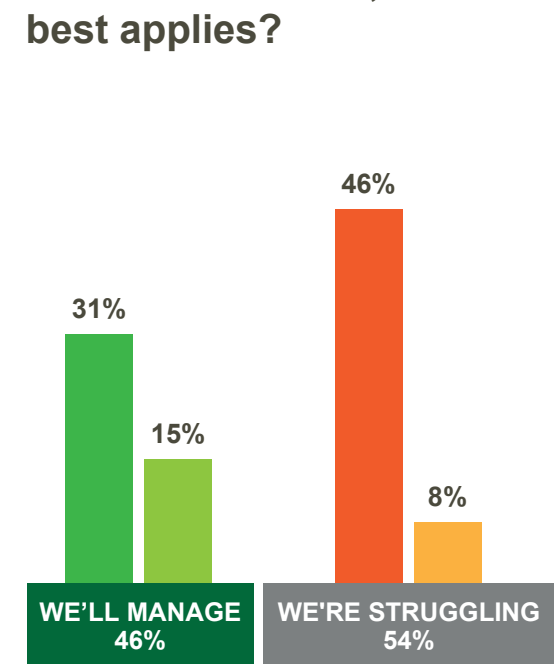
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



- No
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- Yes, for more than 50% of our 2019 overall costs

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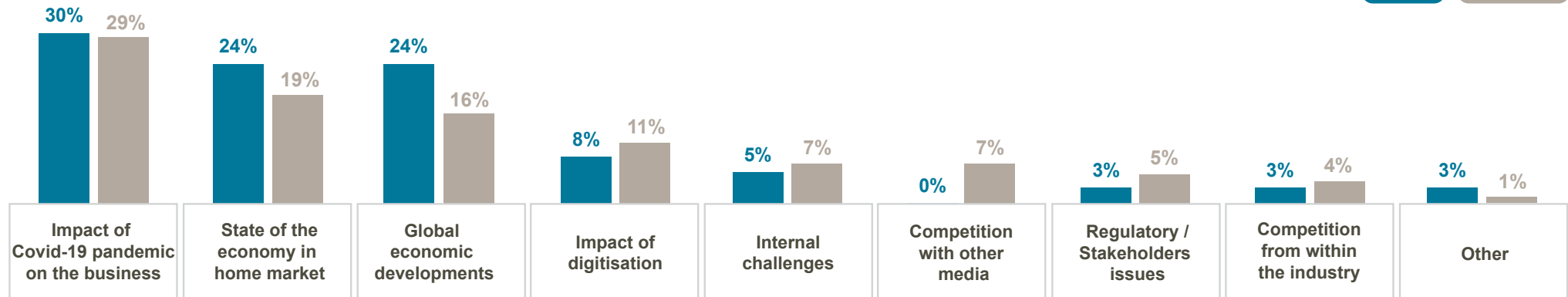
Detailed results for United Arab Emirates



Most important business issues in the exhibition industry

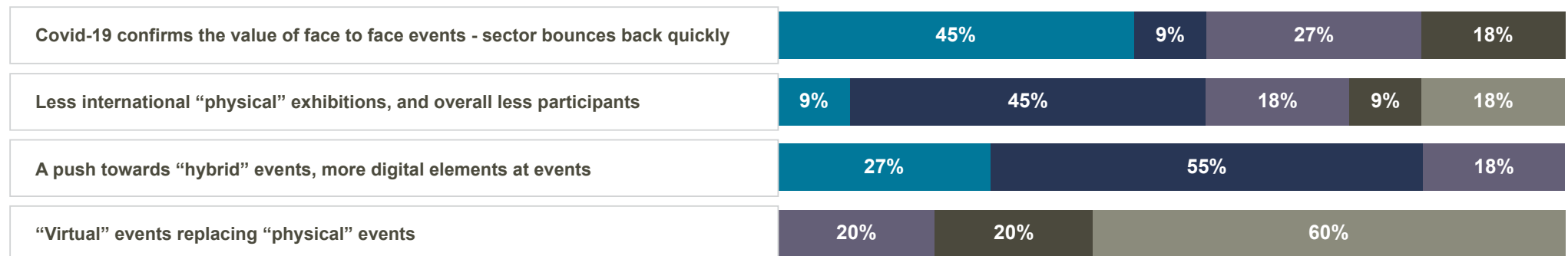
UAE

Global

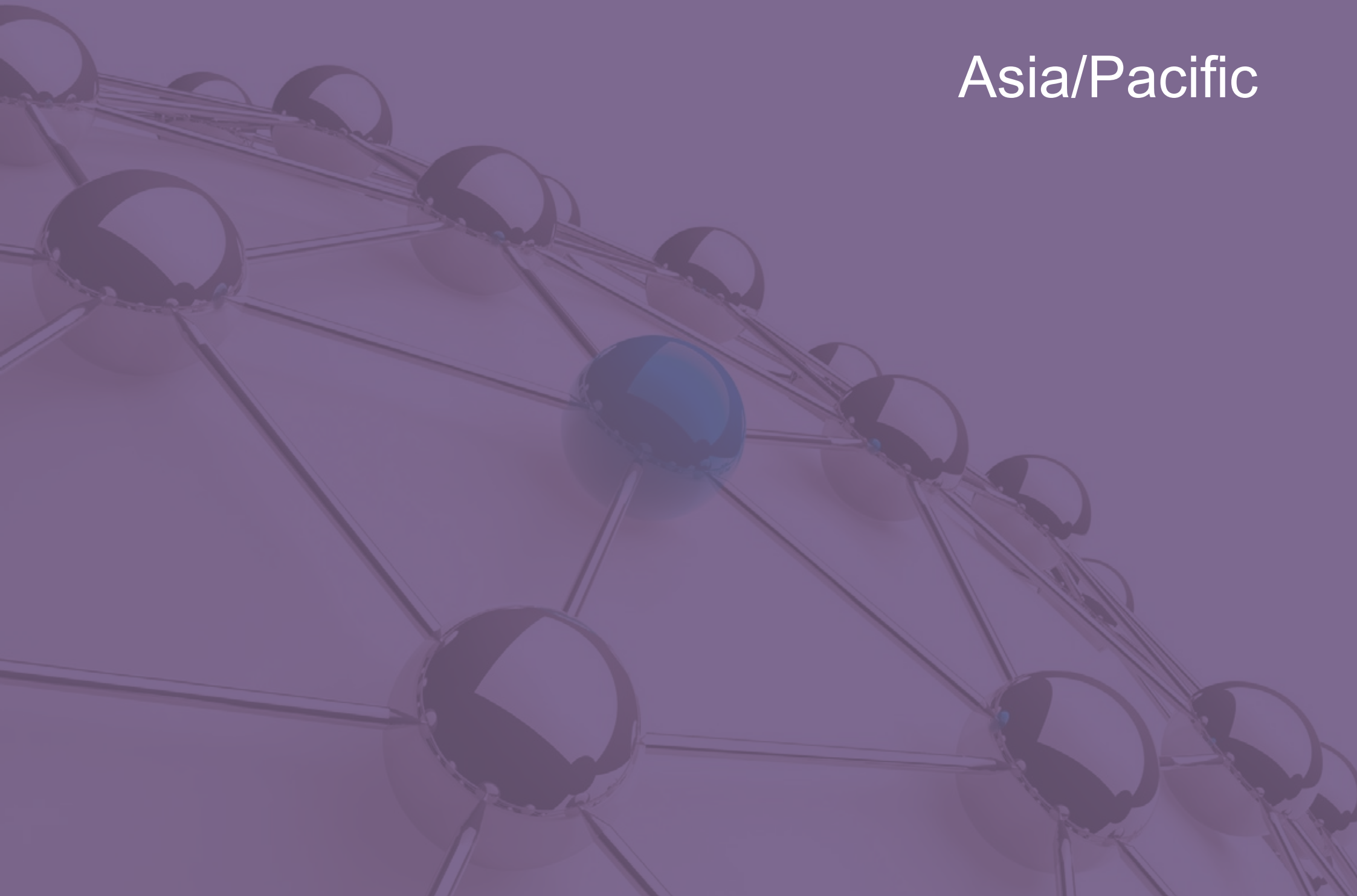


Format of exhibitions in the coming years

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



Asia/Pacific

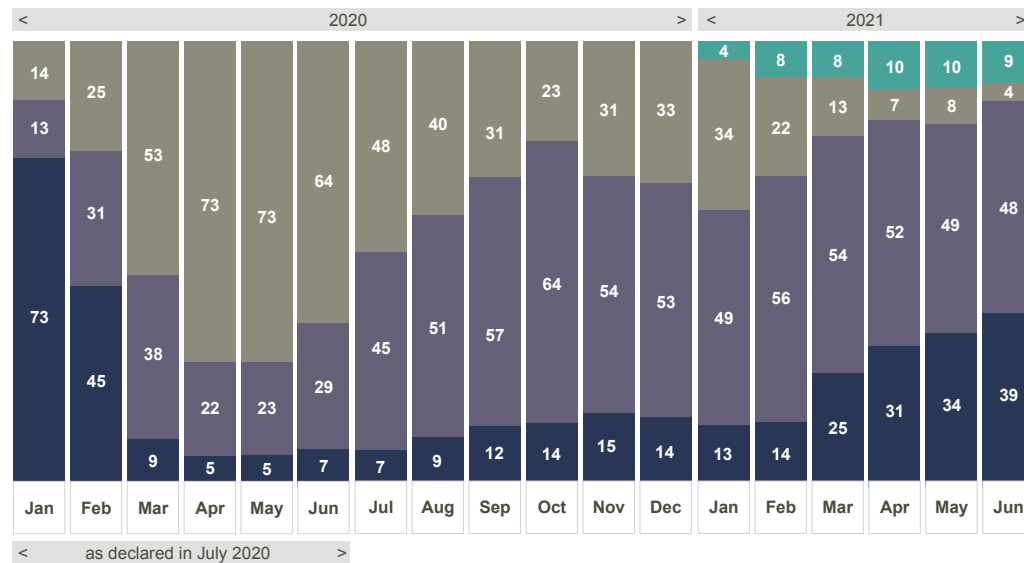


Operations - Reopening Exhibitions Asia/Pacific

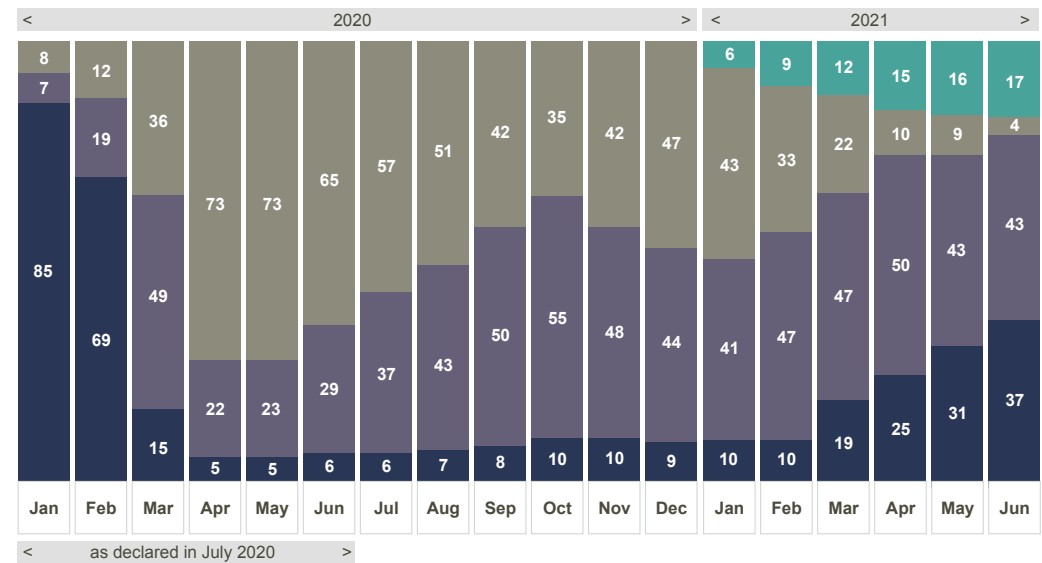
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



Asia/Pacific

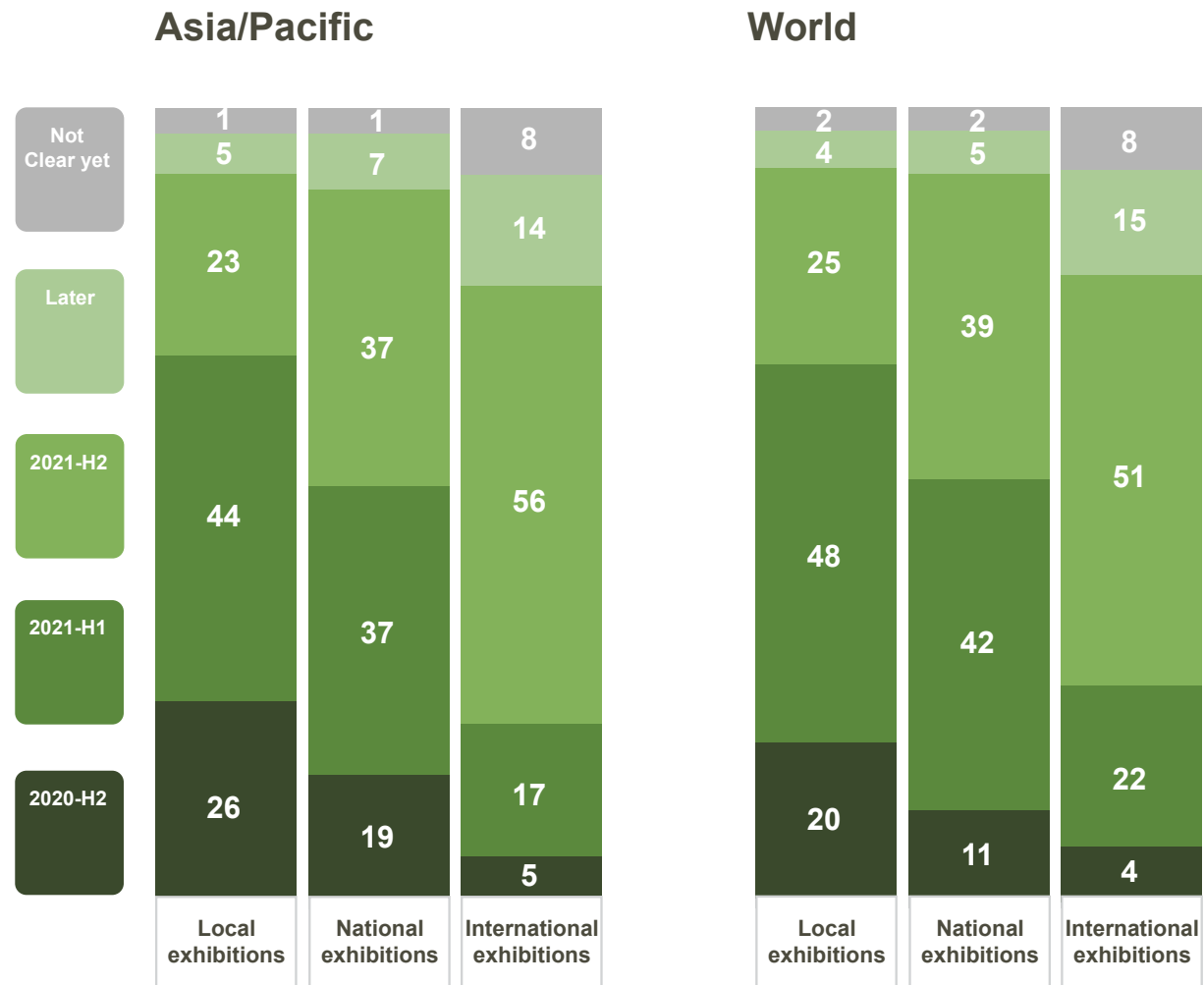


World



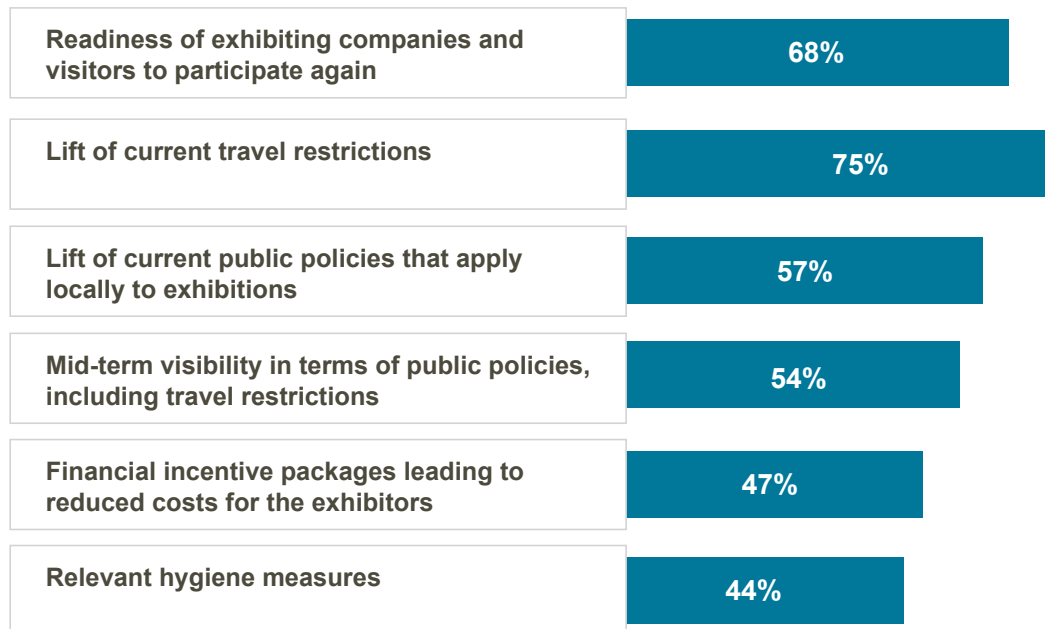


**When do you believe exhibitions
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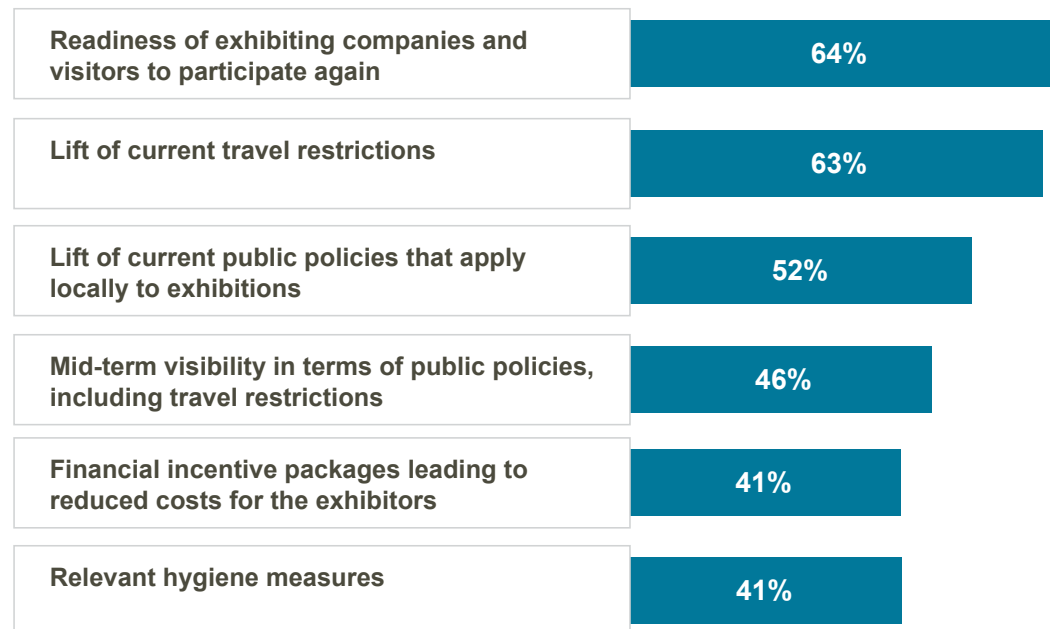


What do you believe would most help the “bounce back” of exhibitions?

Asia/Pacific

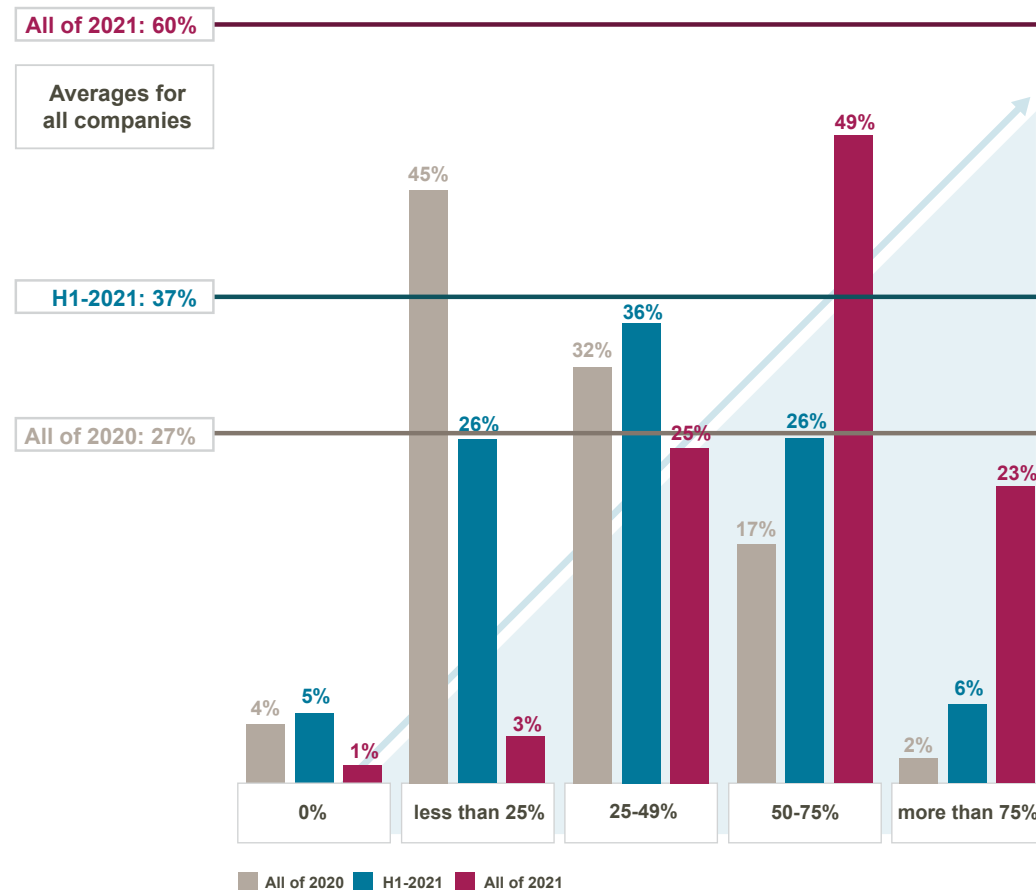


World

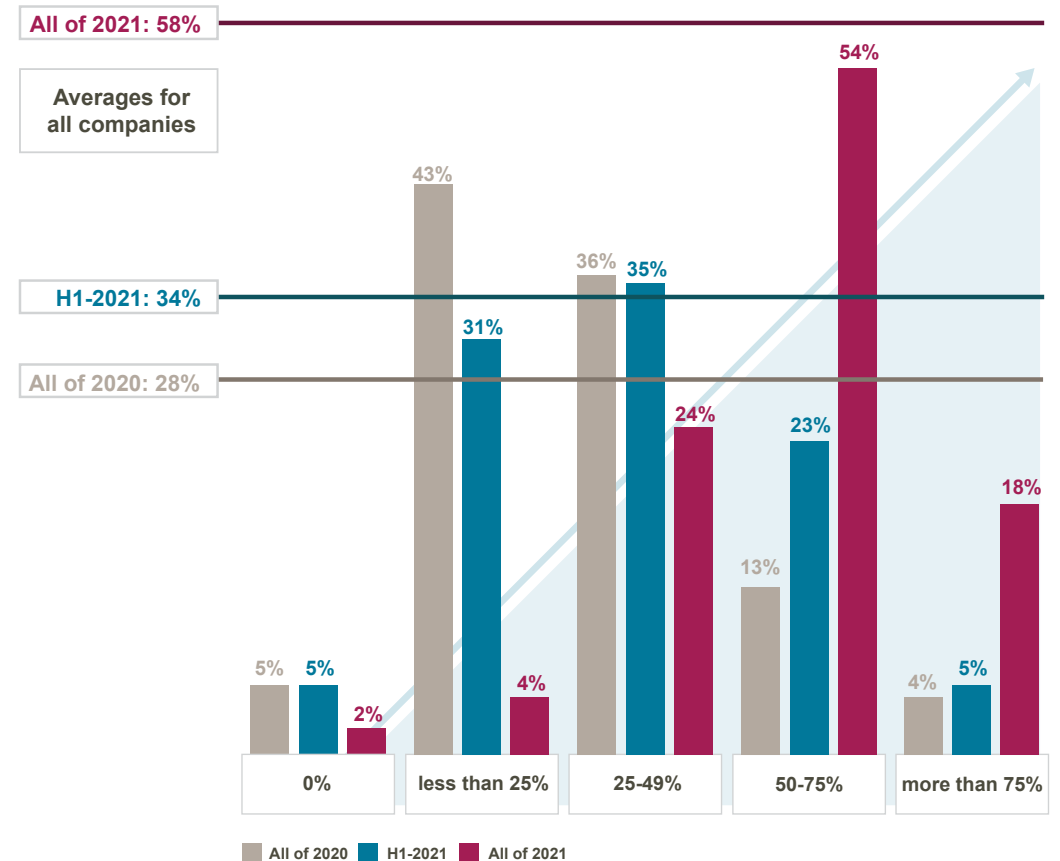


Revenue compared to last year (2019)

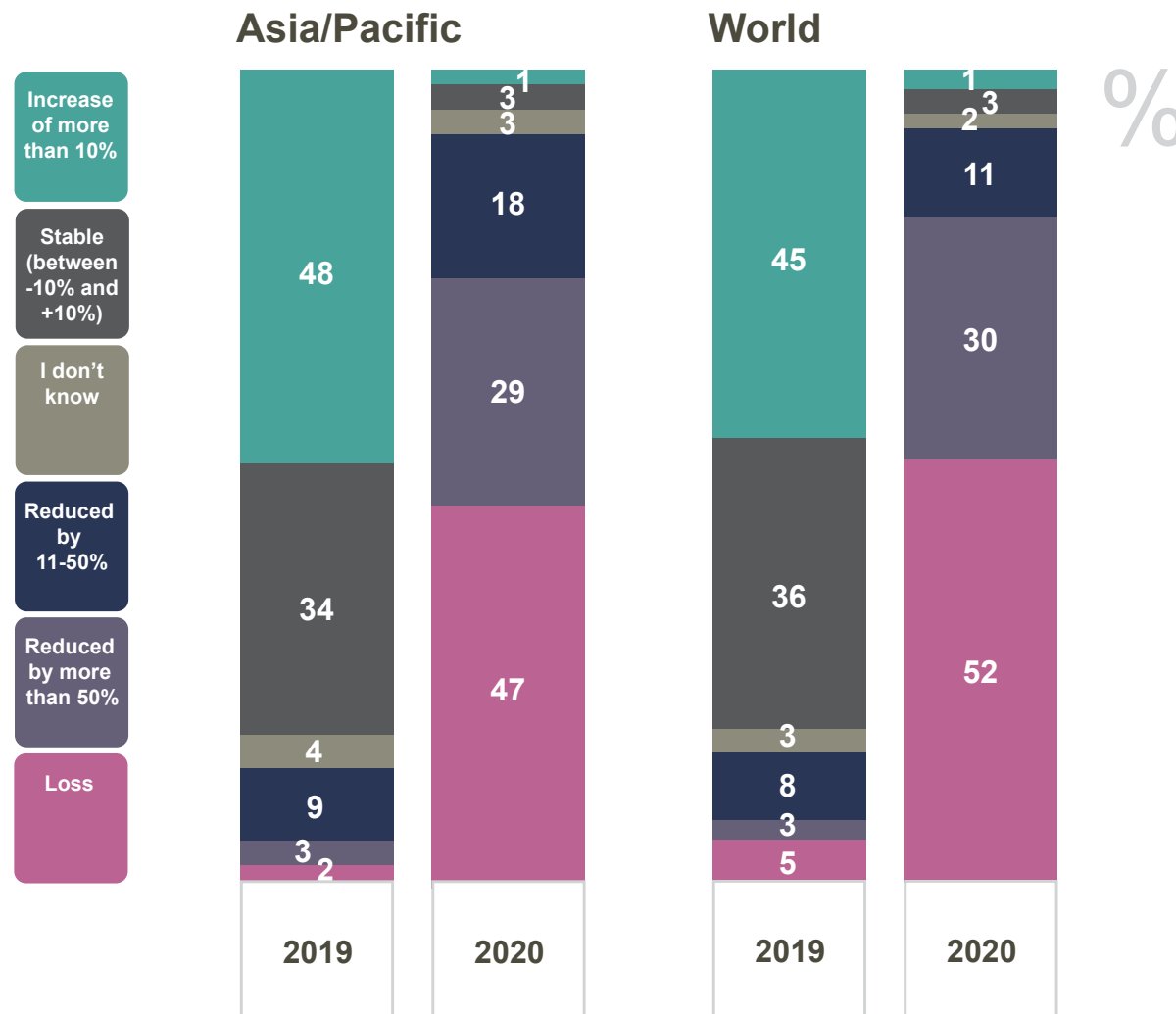
Asia/Pacific



World



Operating profits Asia/Pacific

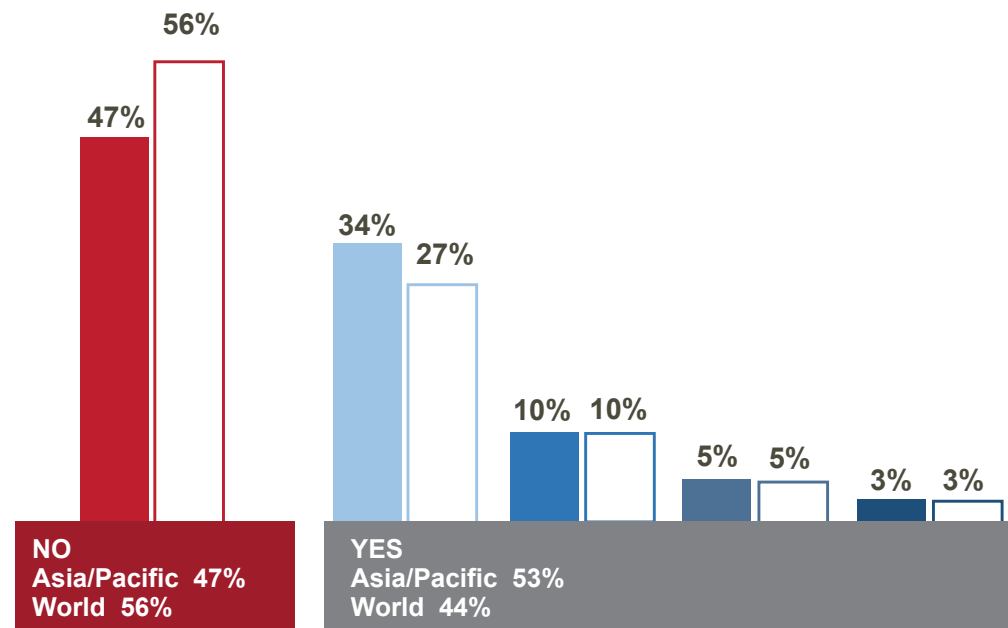


Did your company benefit from public financial support?

Asia/Pacific

World

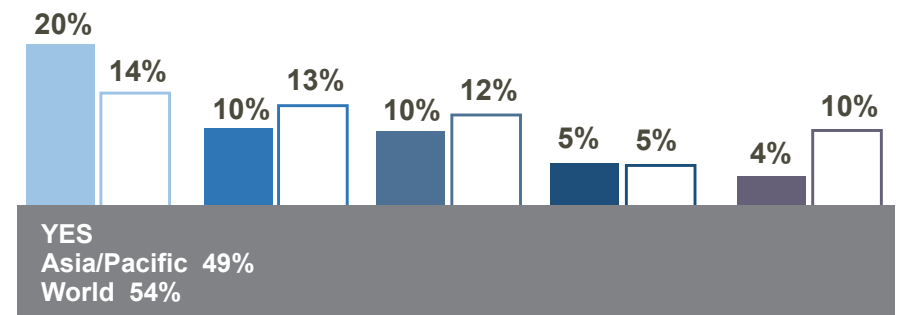
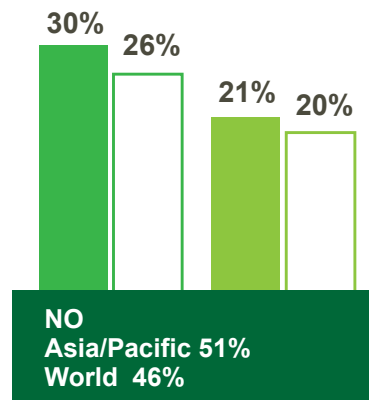
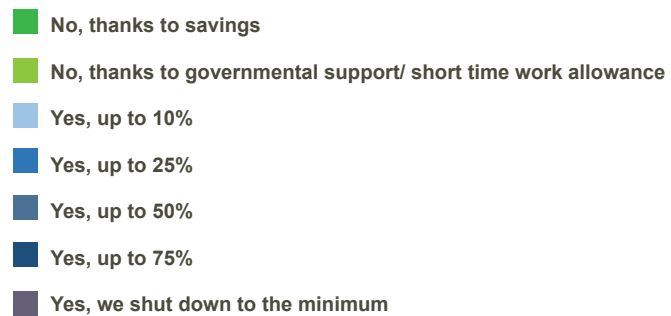
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- Yes, for more than 50% of our 2019 overall costs



Have you had to reduce your workforce?

Asia/Pacific

World

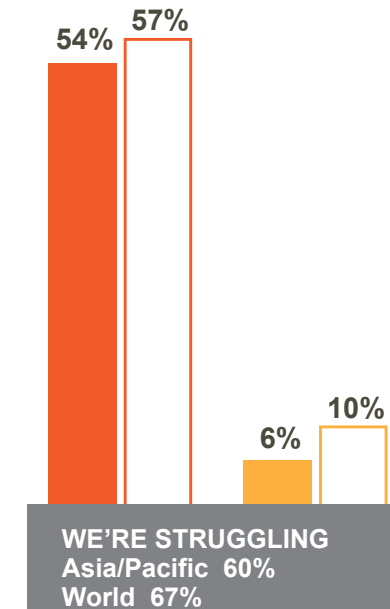
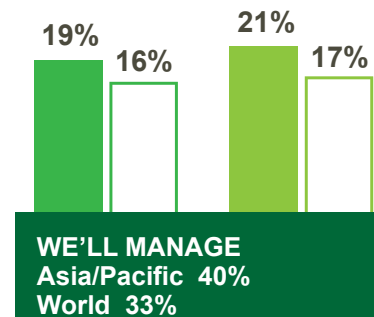


If there is no business for the next 6 months,
which best applies?

Asia/Pacific

World

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

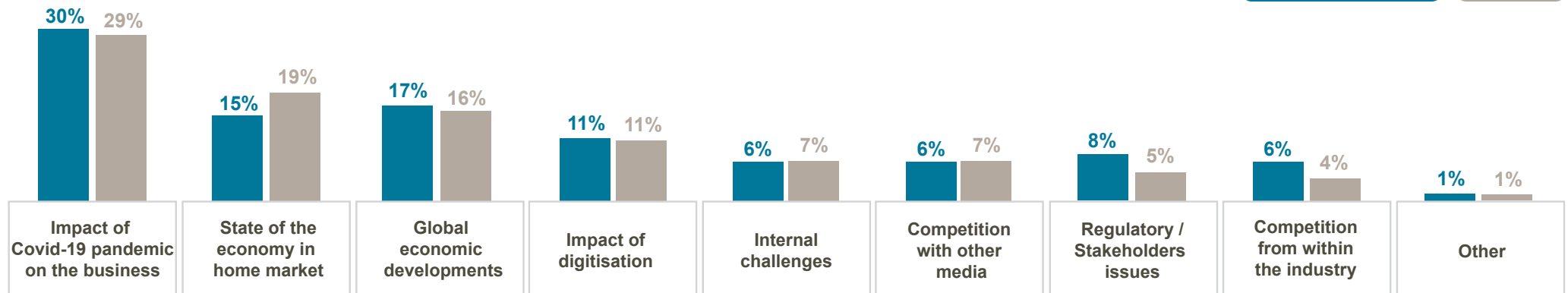


Most Important Business Issues - Format of Exhibitions - Asia/Pacific

Most important business issues in the exhibition industry

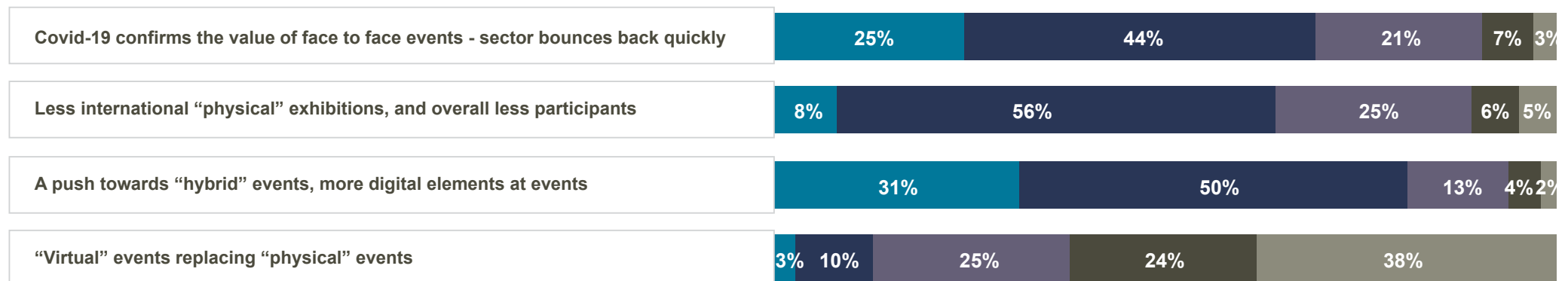
Asia/Pacific

Global

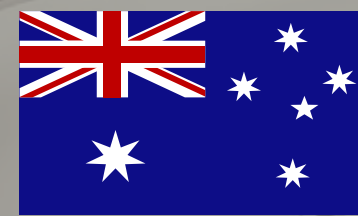


Format of exhibitions in the coming years

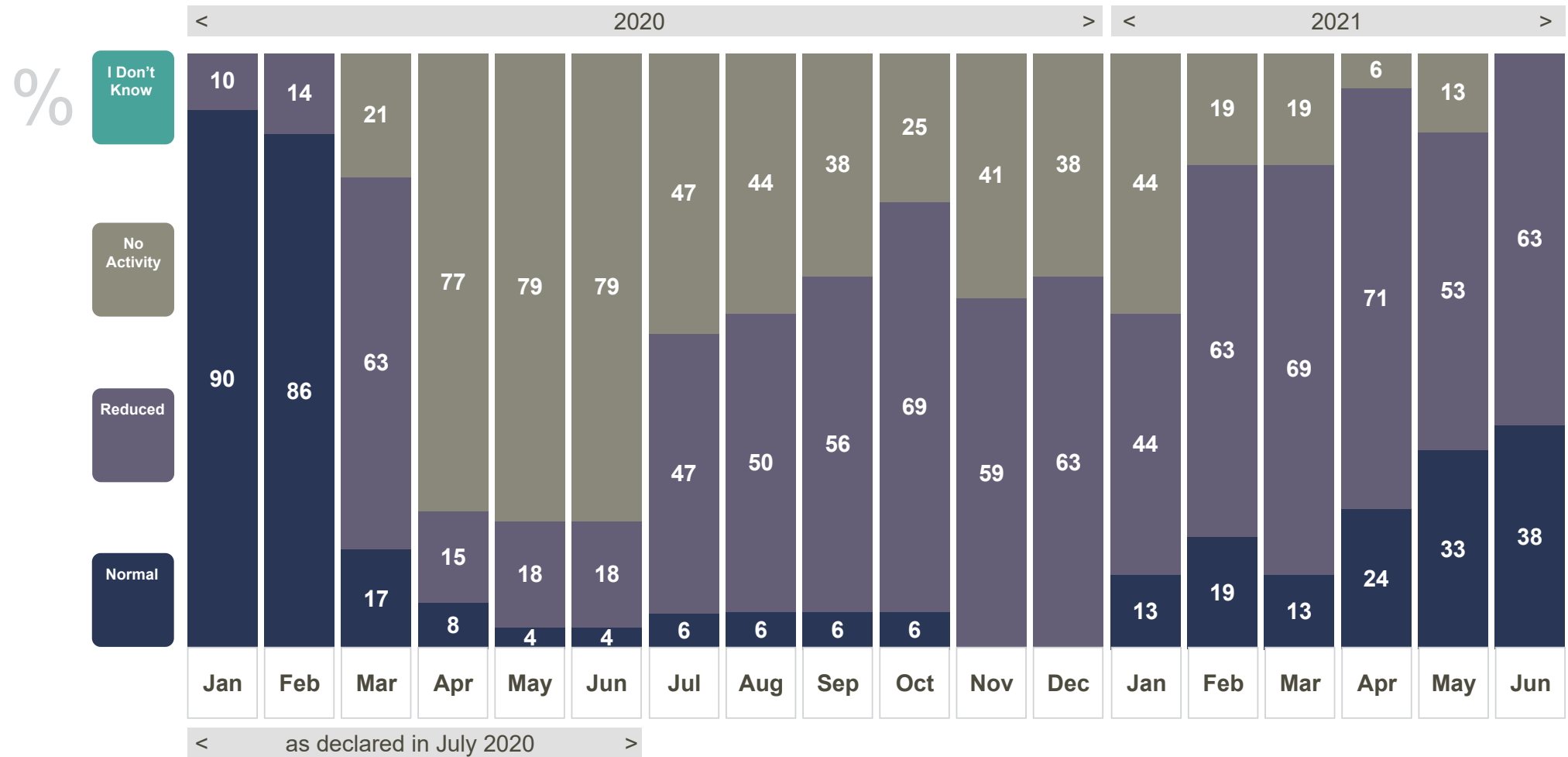
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not

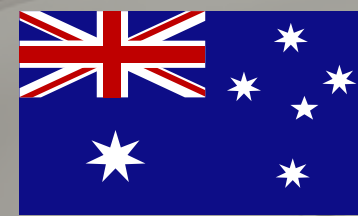


Detailed results for Australia

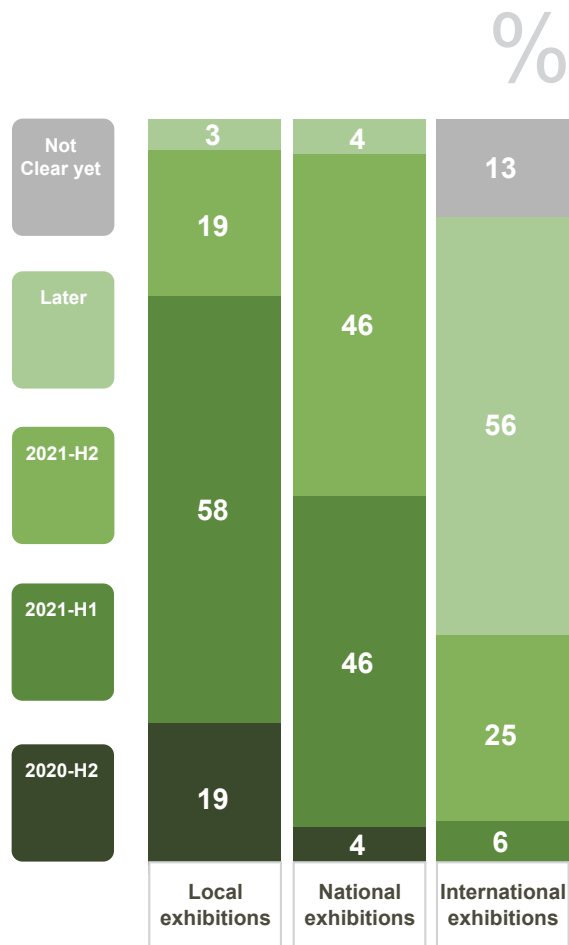


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

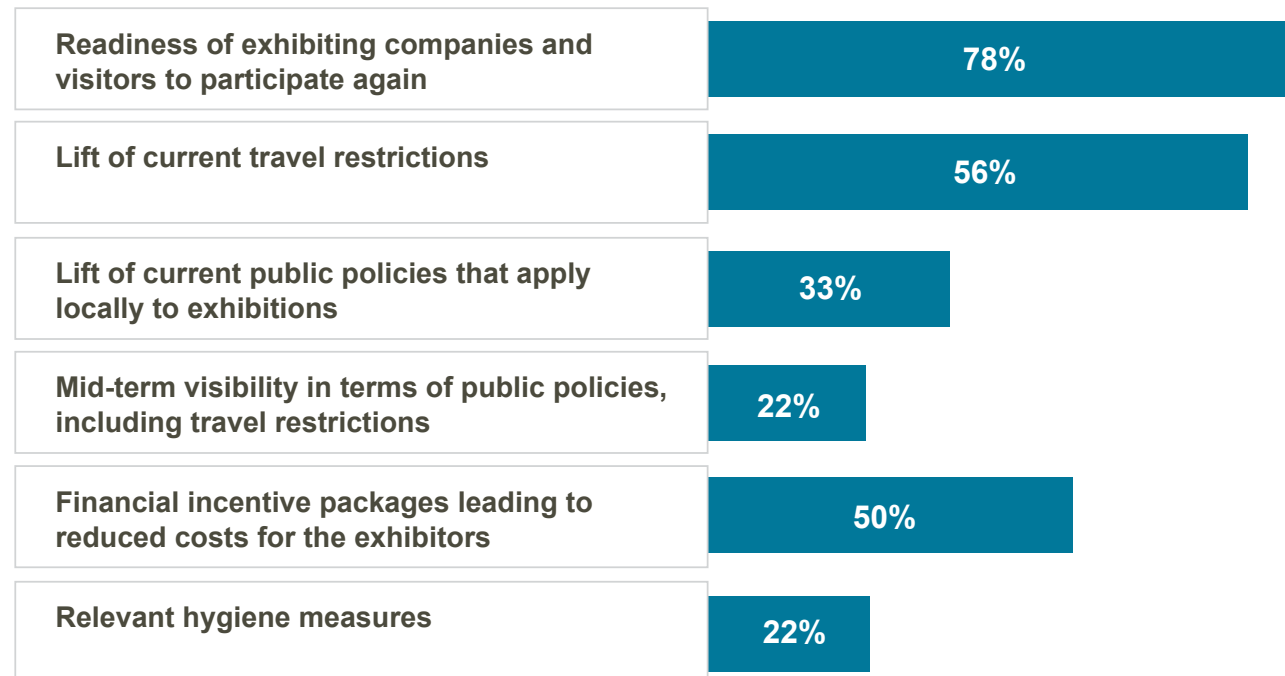


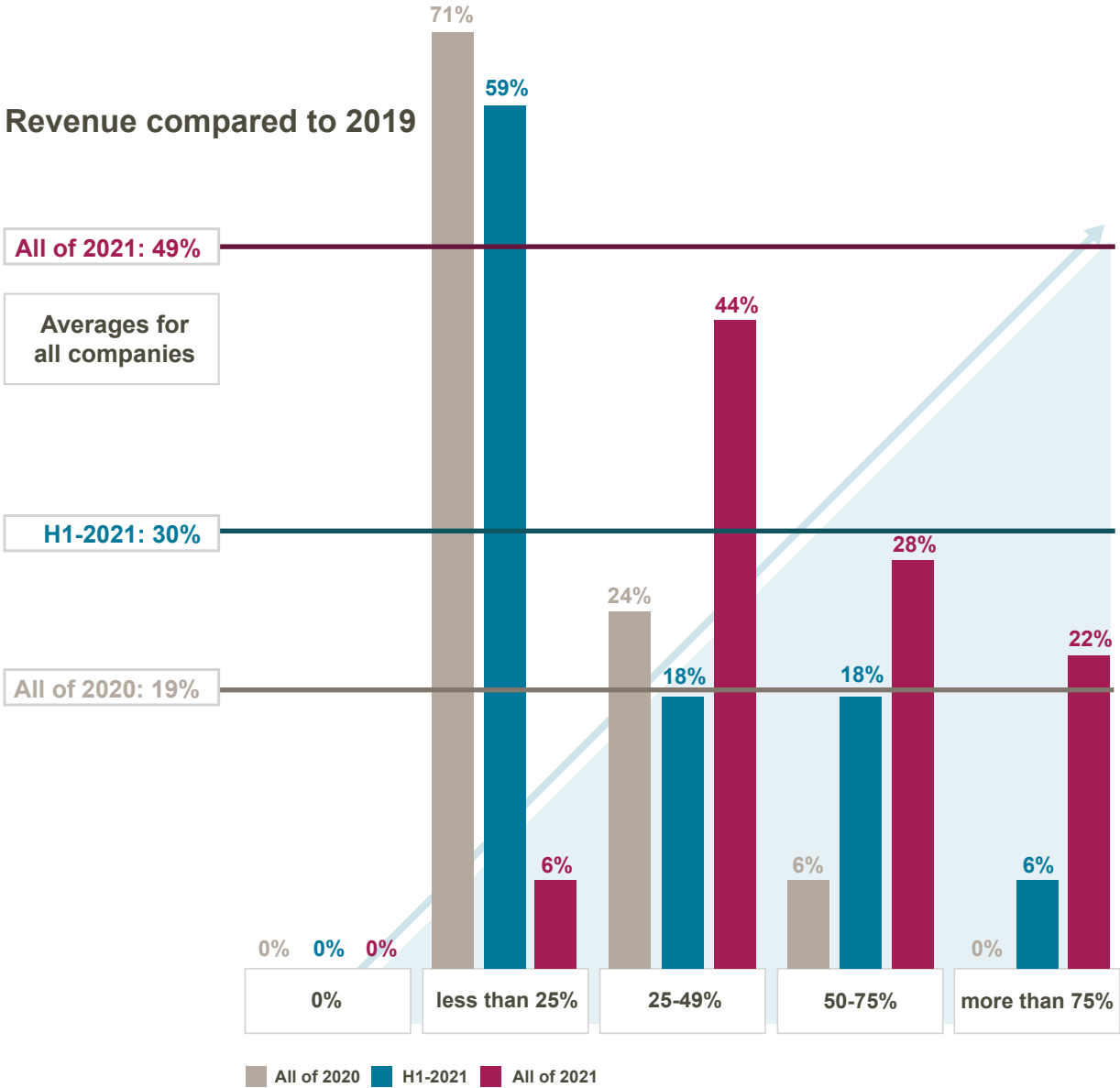
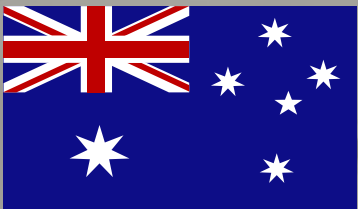


When do you believe exhibitions will open again in your city?

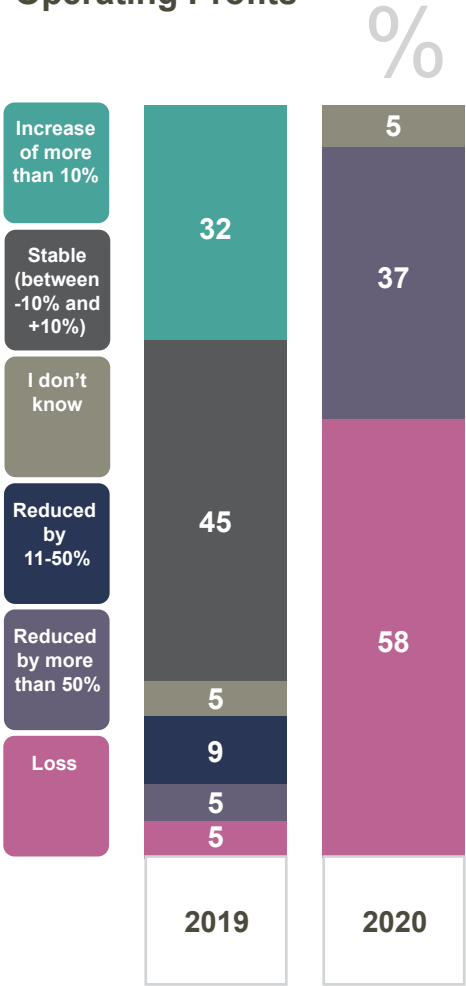


What do you believe would most help the “bounce back” of exhibitions?

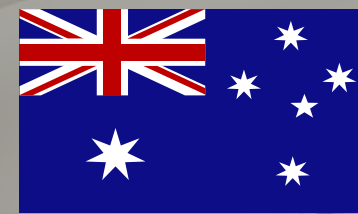




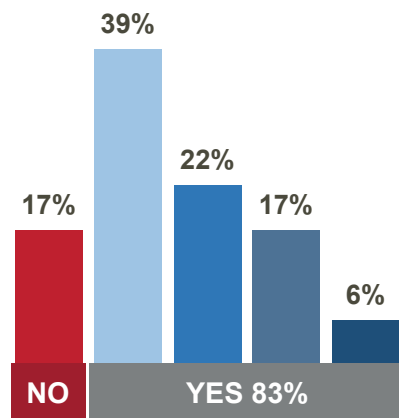
Operating Profits



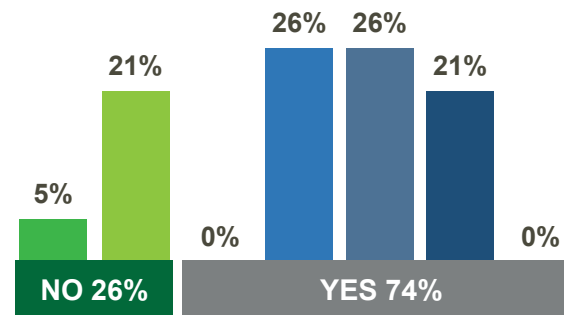
Detailed results for Australia



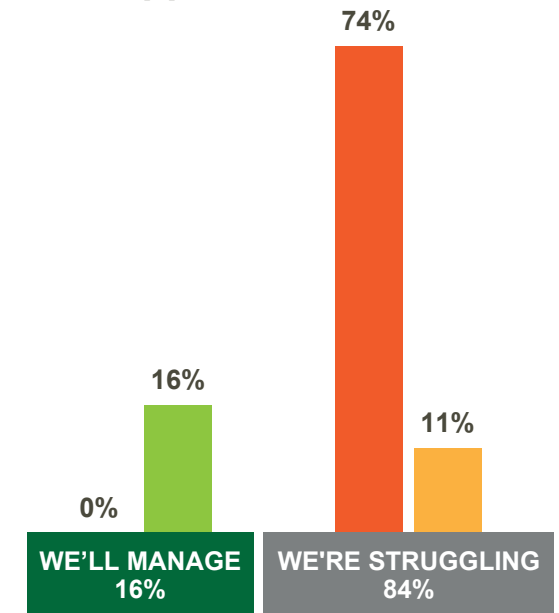
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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

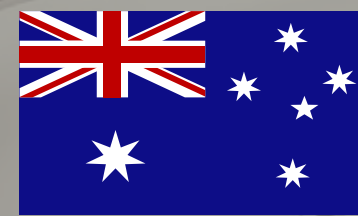


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

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

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

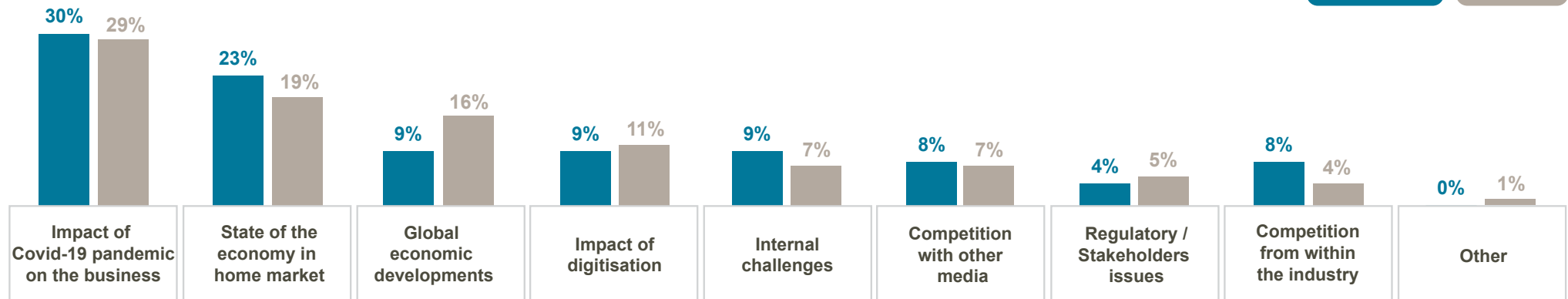
Detailed results for Australia



Most important business issues in the exhibition industry

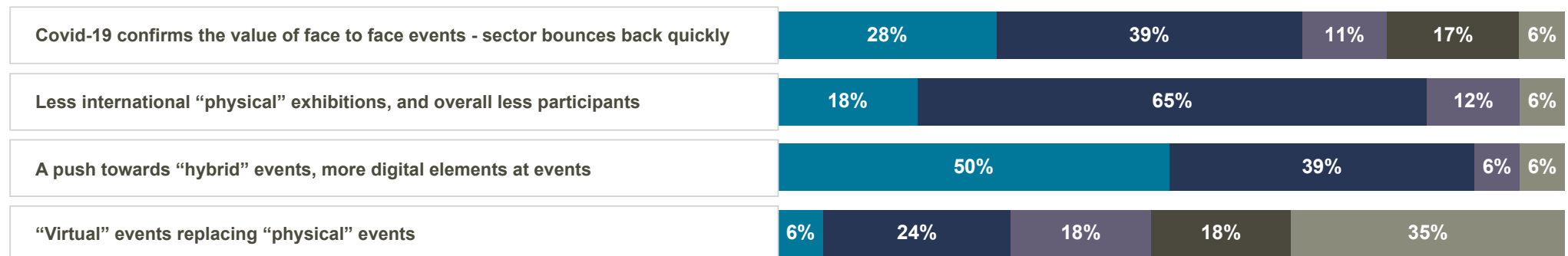
Australia

Global



Format of exhibitions in the coming years

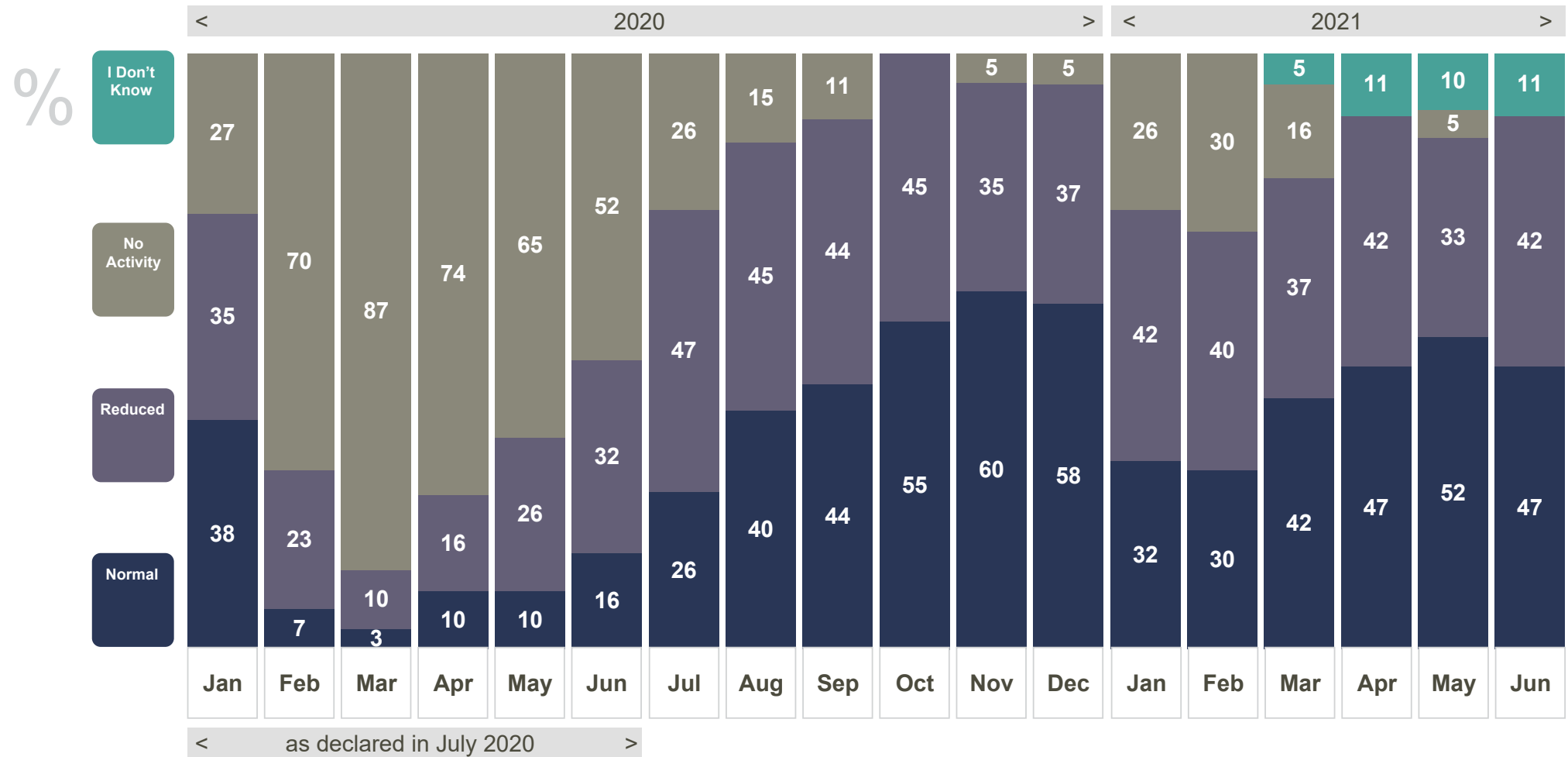
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for China

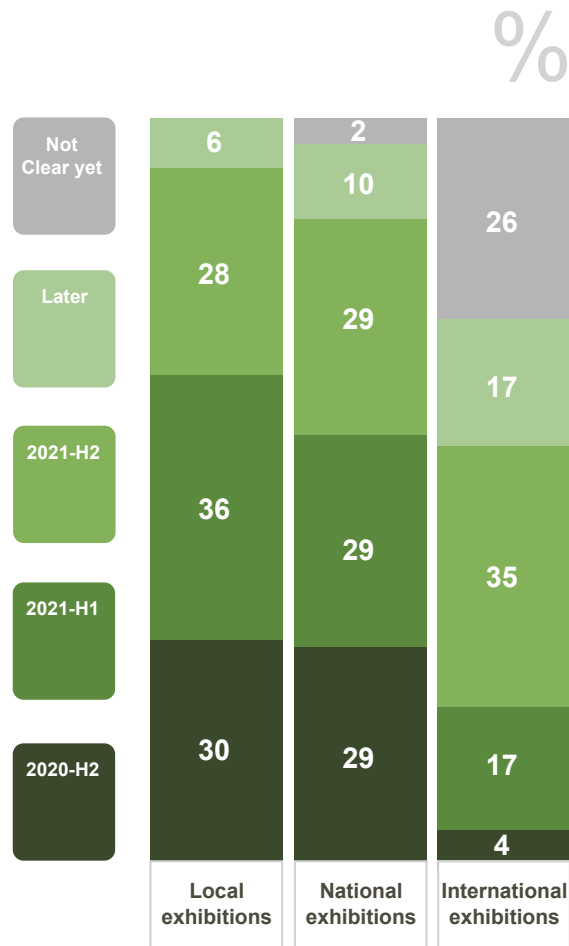


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

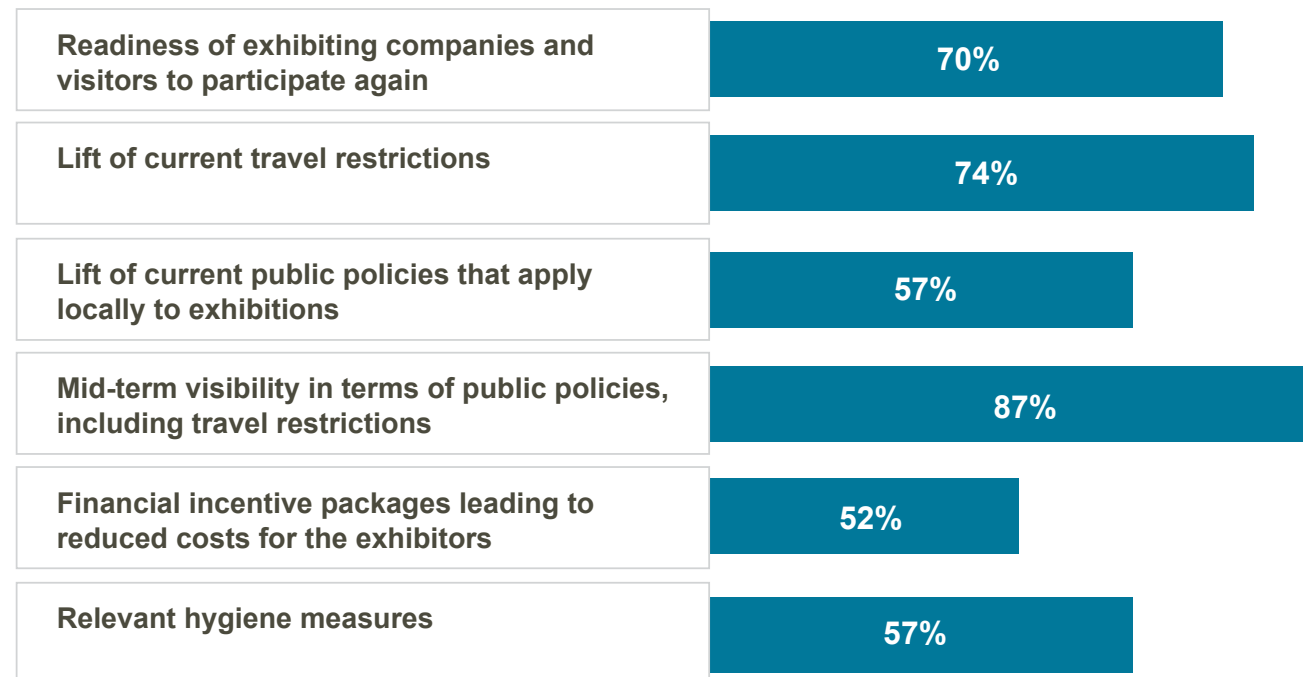




When do you believe exhibitions will open again in your city?



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



Detailed results for China



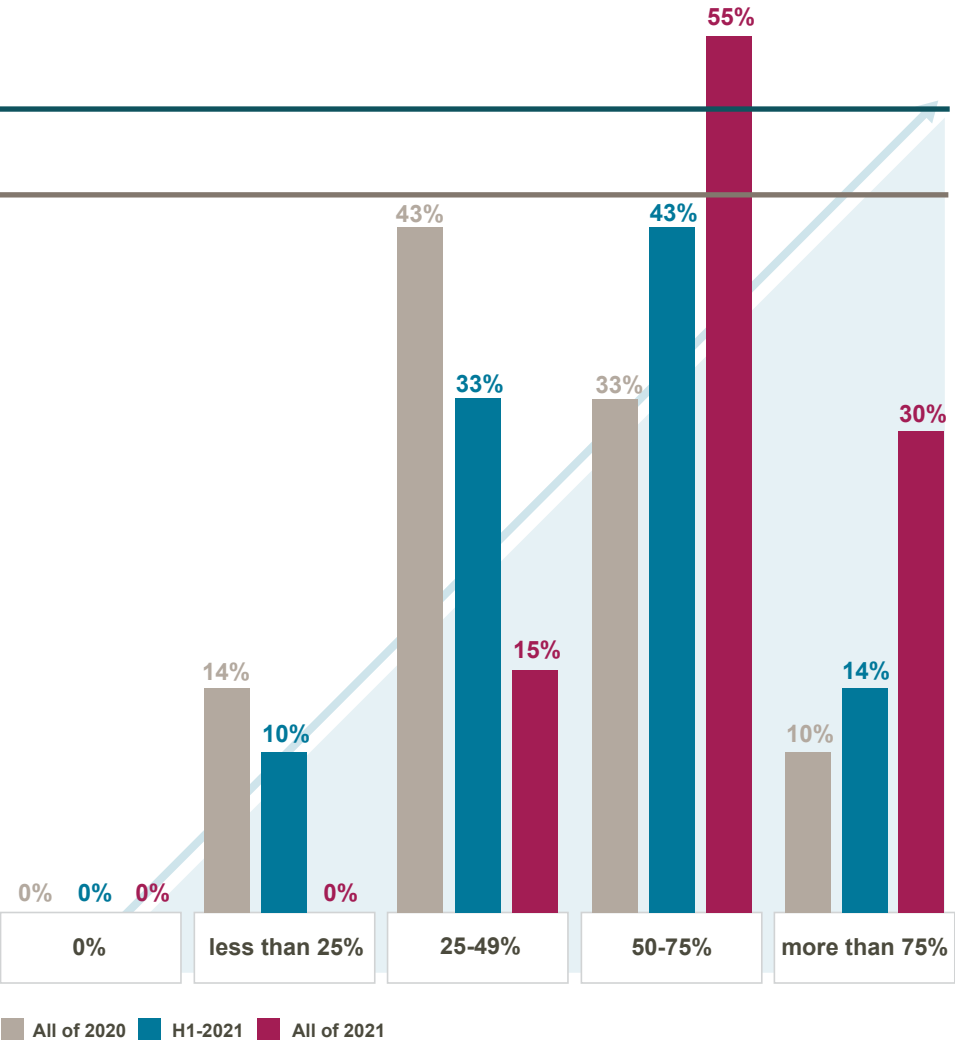
All of 2021: 68%

Revenue compared to 2019

H1-2021: 50%

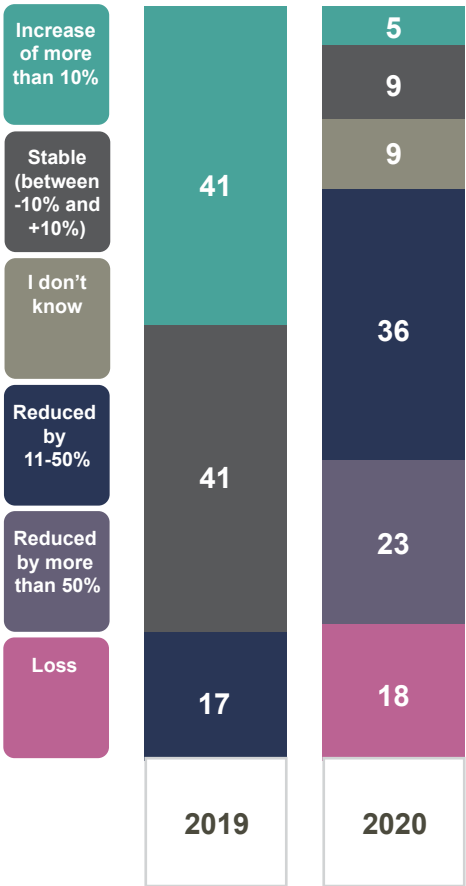
All of 2020: 45%

Averages for
all companies



Operating Profits

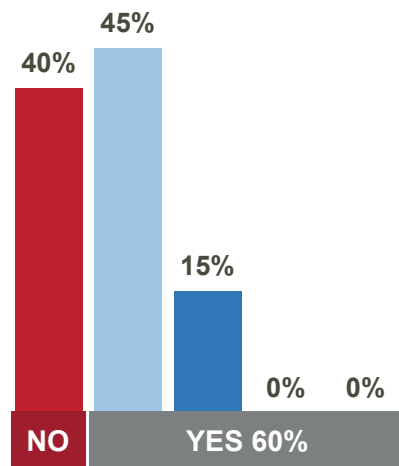
%



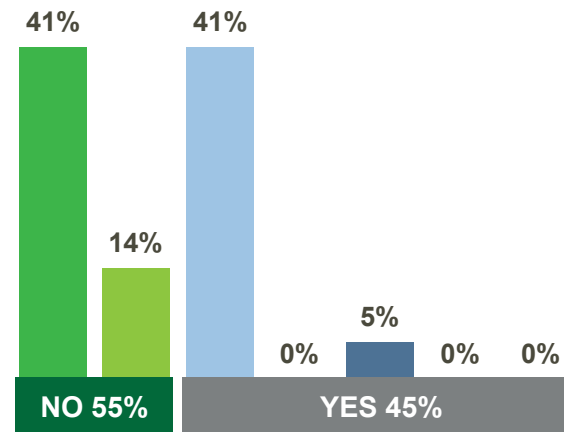
Detailed results for China



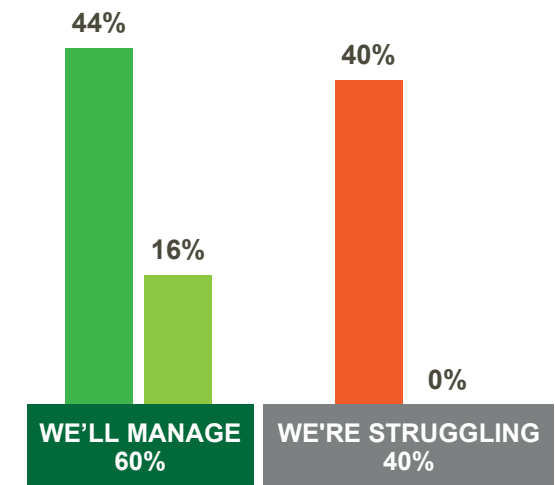
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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

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

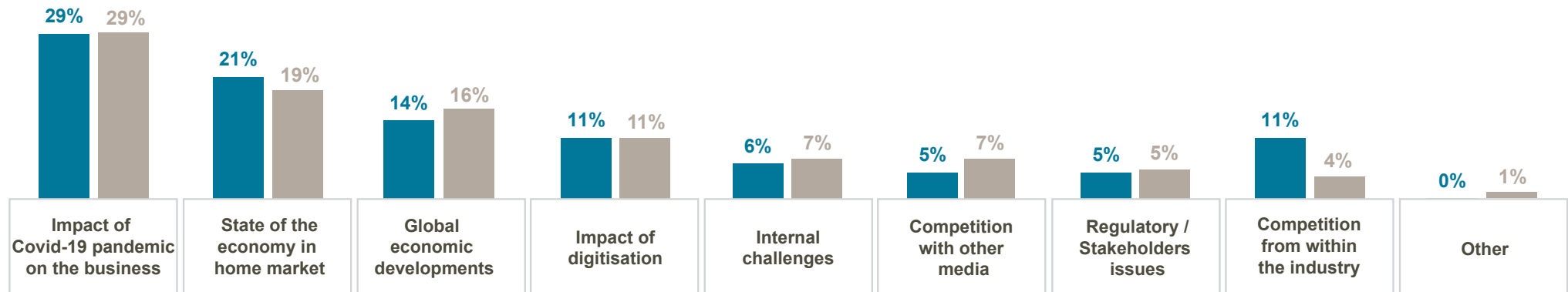
Detailed results for China



Most important business issues in the exhibition industry

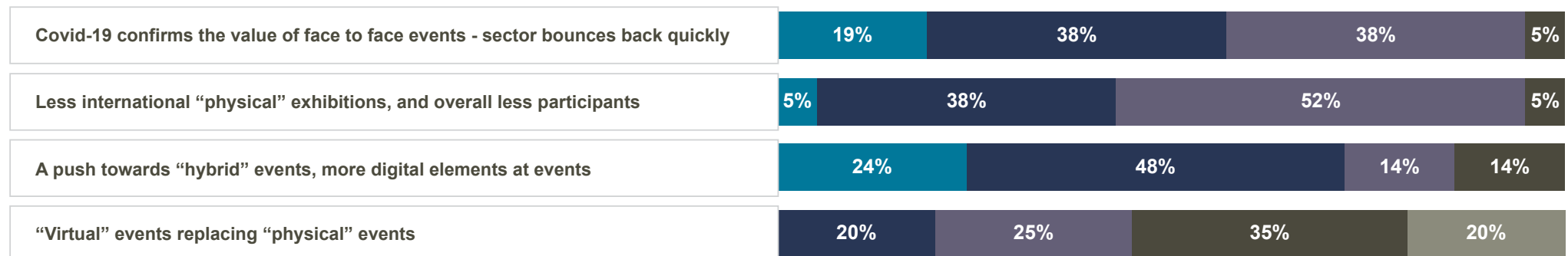
China

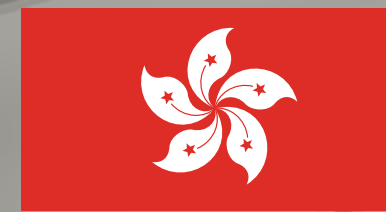
Global



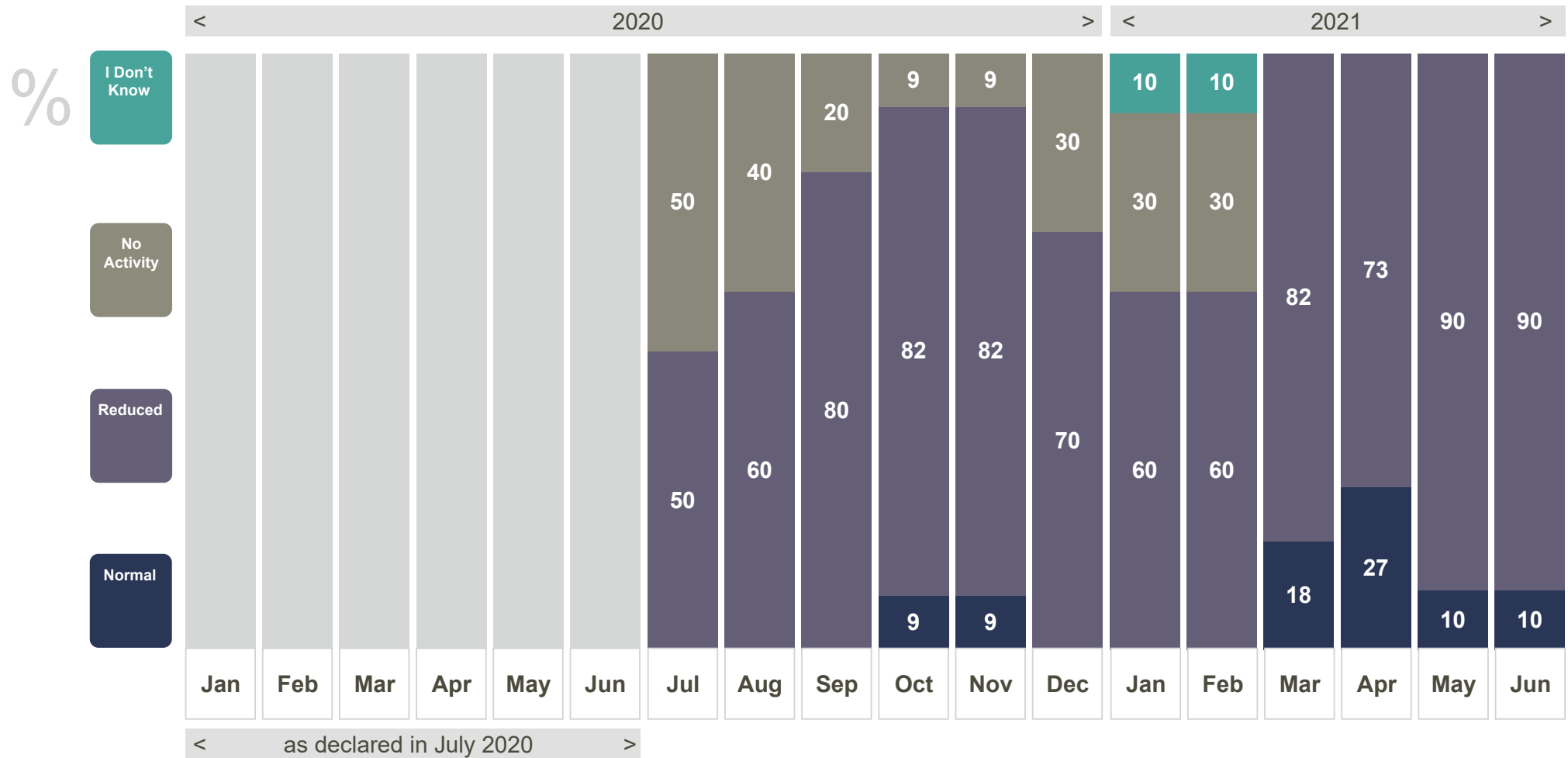
Format of exhibitions in the coming years

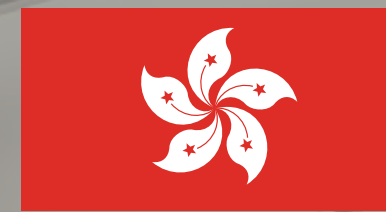
Yes, for sure Most probably Not sure Not sure at all Definitely not



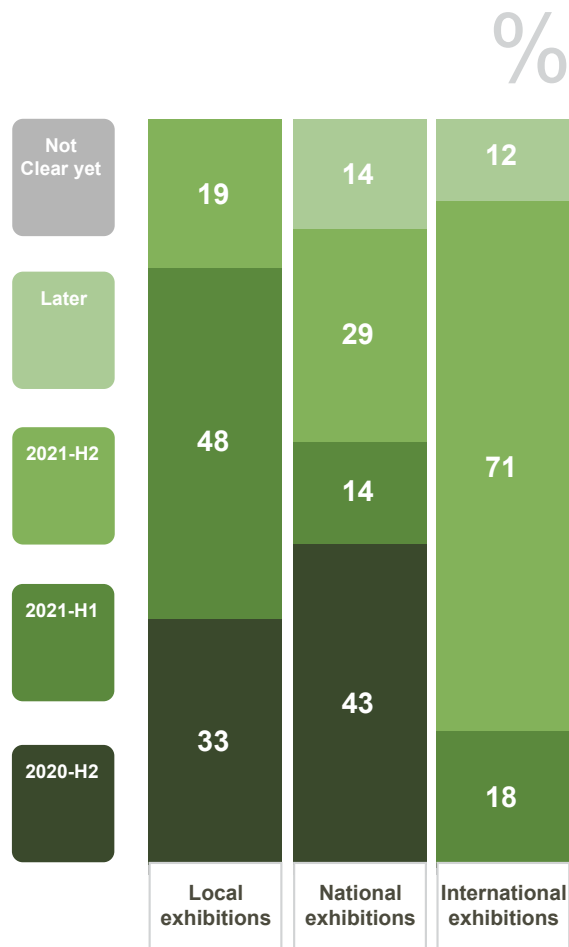


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

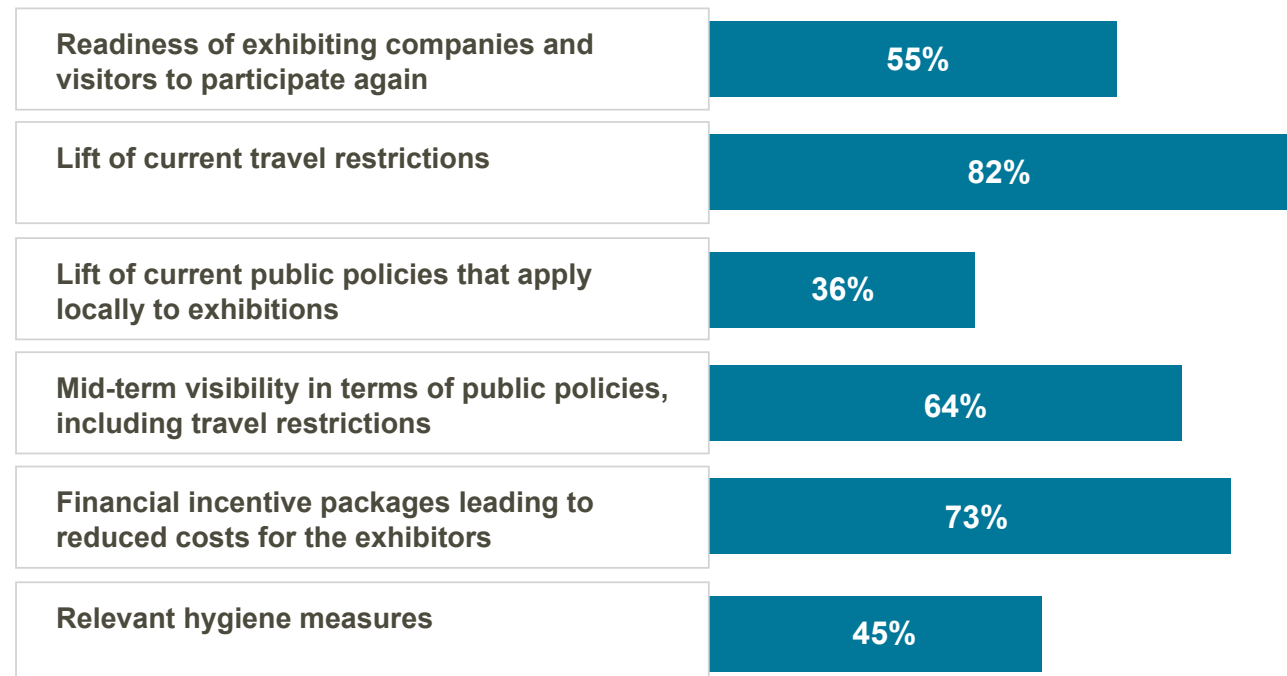




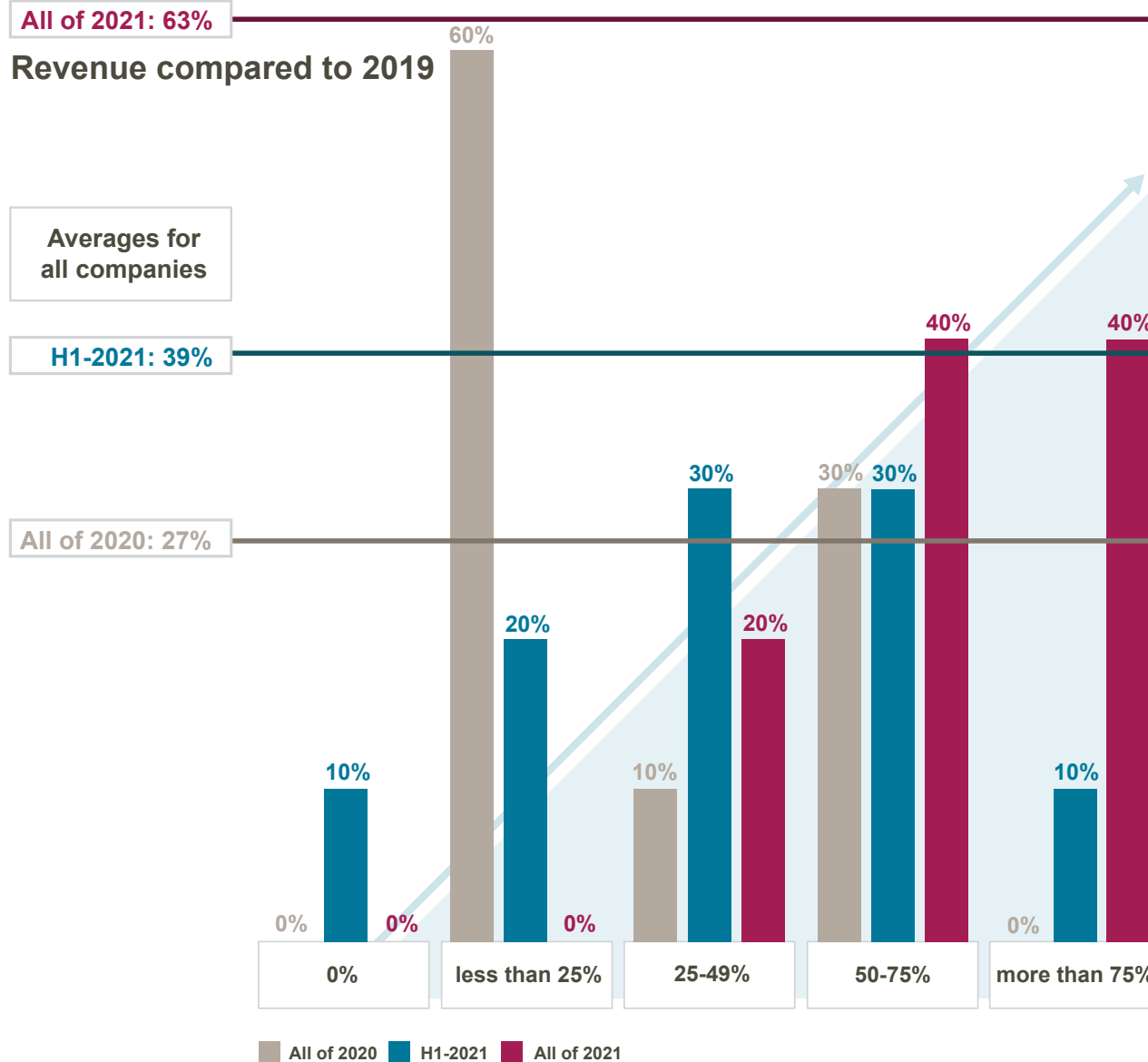
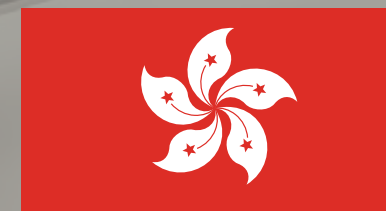
When do you believe exhibitions will open again in your city?



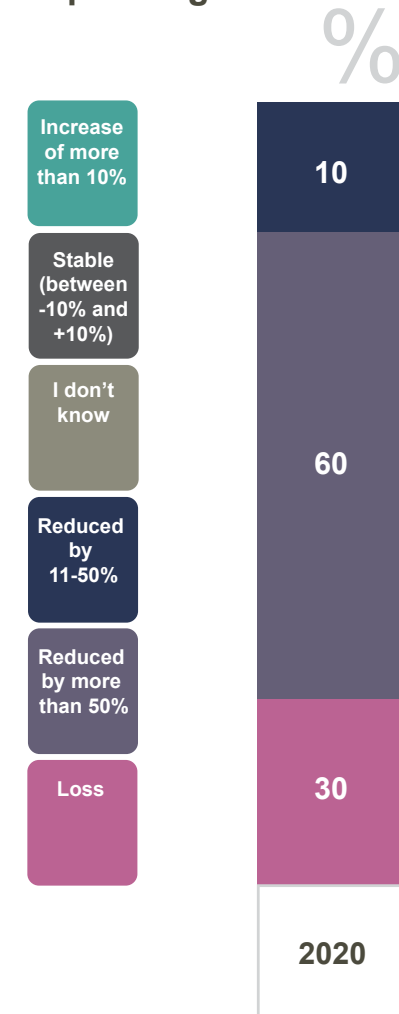
What do you believe would most help the “bounce back” of exhibitions?



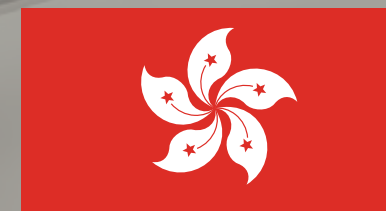
Detailed results for Hong Kong



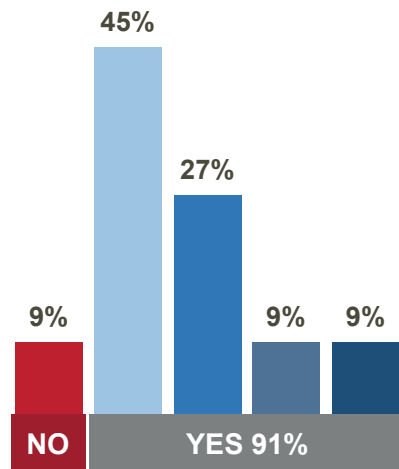
Operating Profits



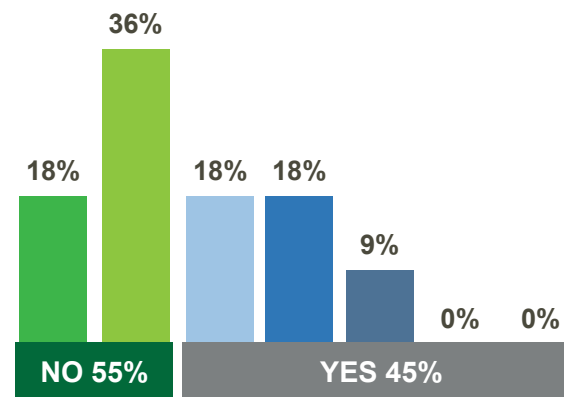
Detailed results for Hong Kong



Did your company benefit from public financial support?



Have you had to reduce your workforce?



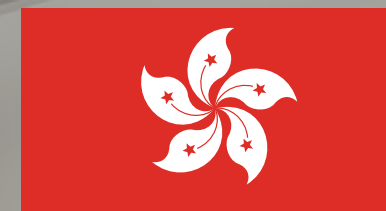
If there is no business for the next 6 months, which best applies?



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

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

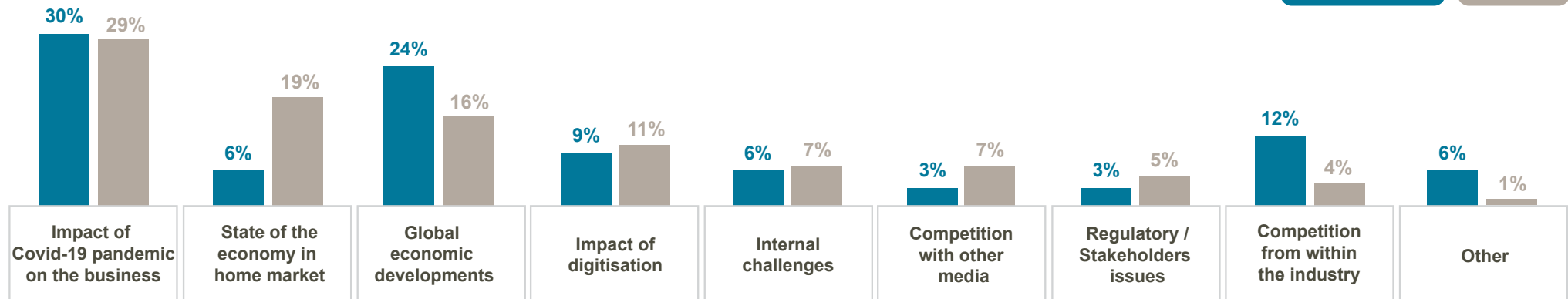
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down



Most important business issues in the exhibition industry

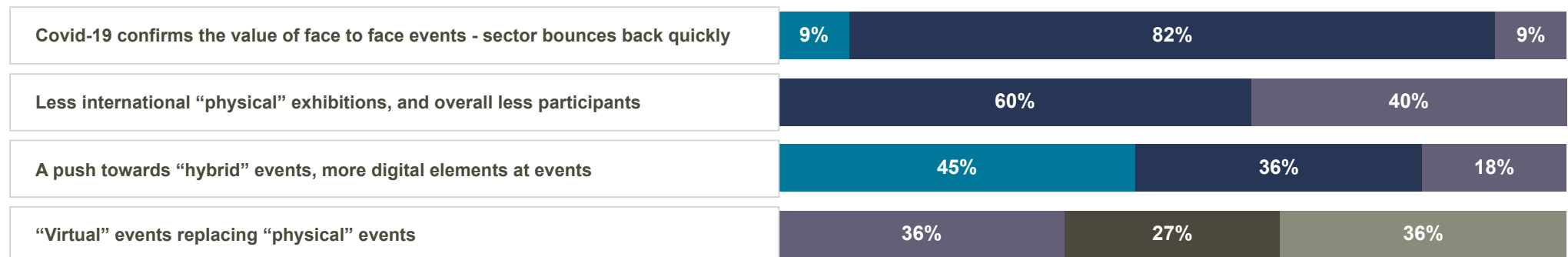
Hong Kong

Global



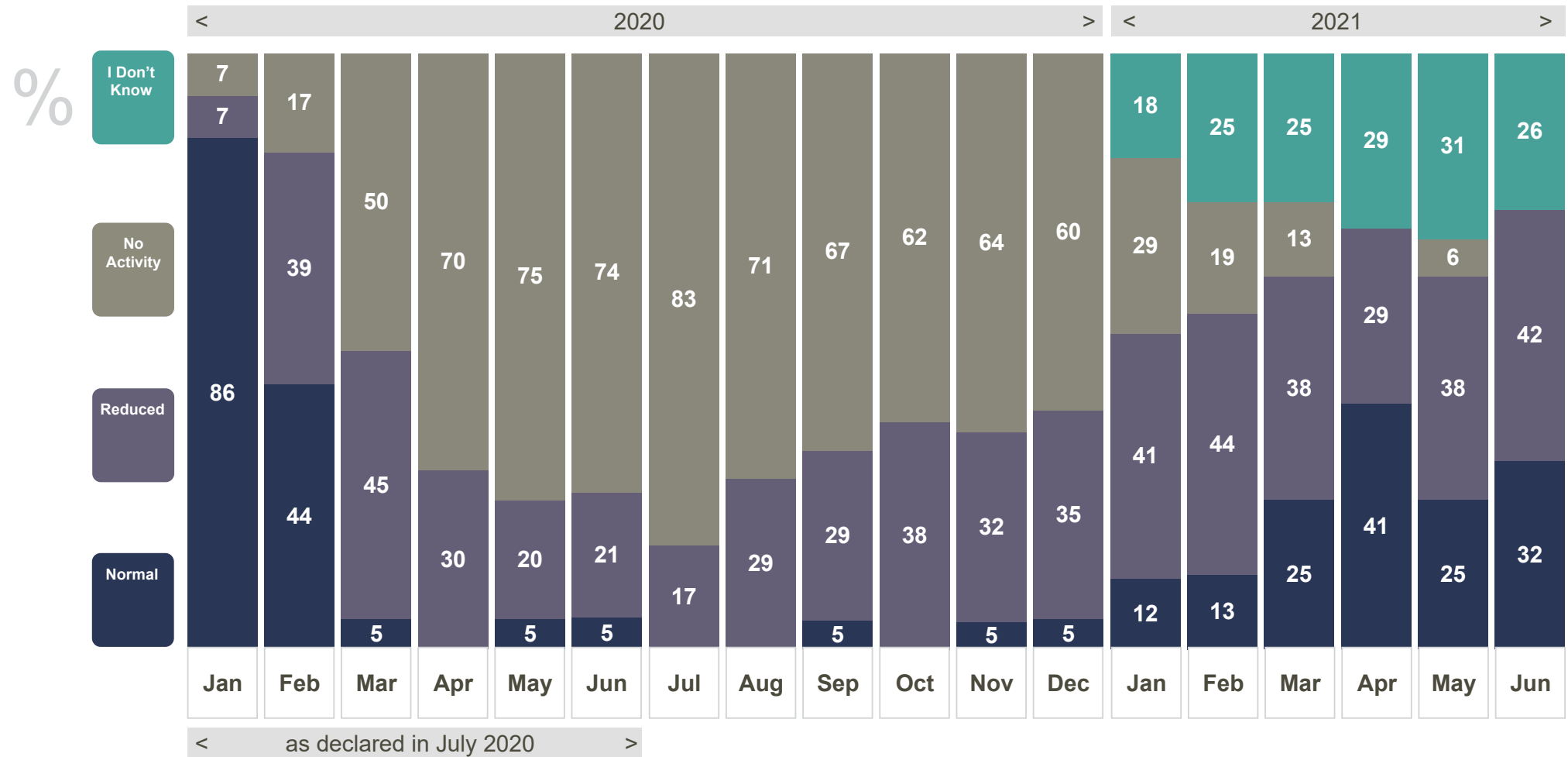
Format of exhibitions in the coming years

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



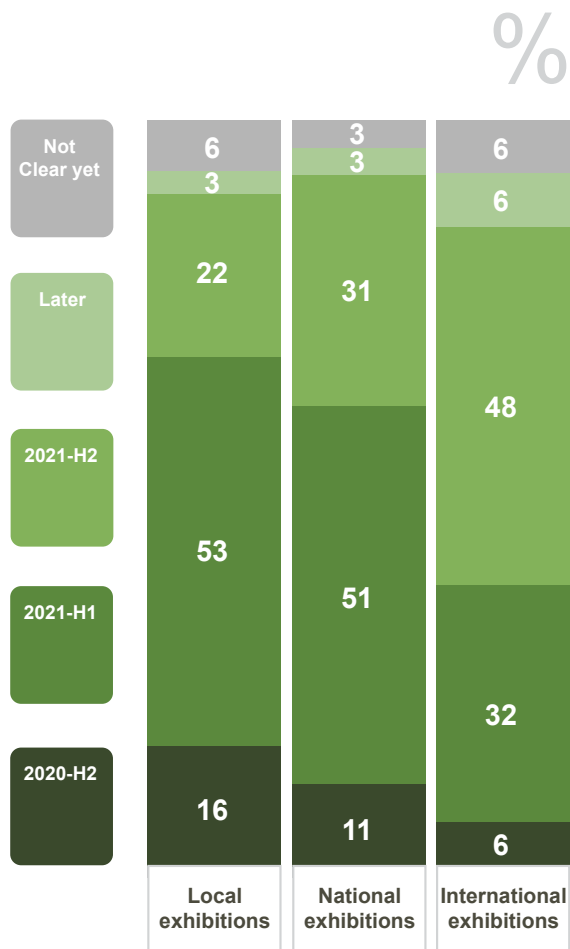


Situation of industry operations in 2020 and current predictions for the 1st half of 2021

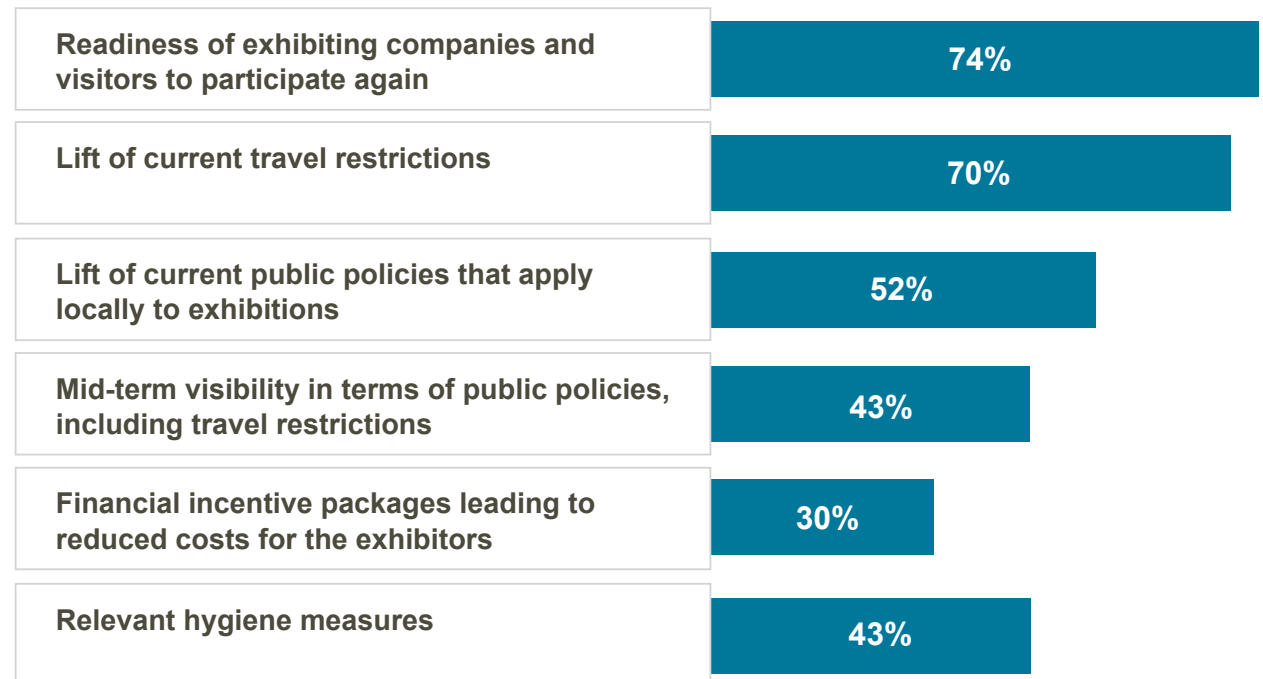




When do you believe exhibitions will open again in your city?



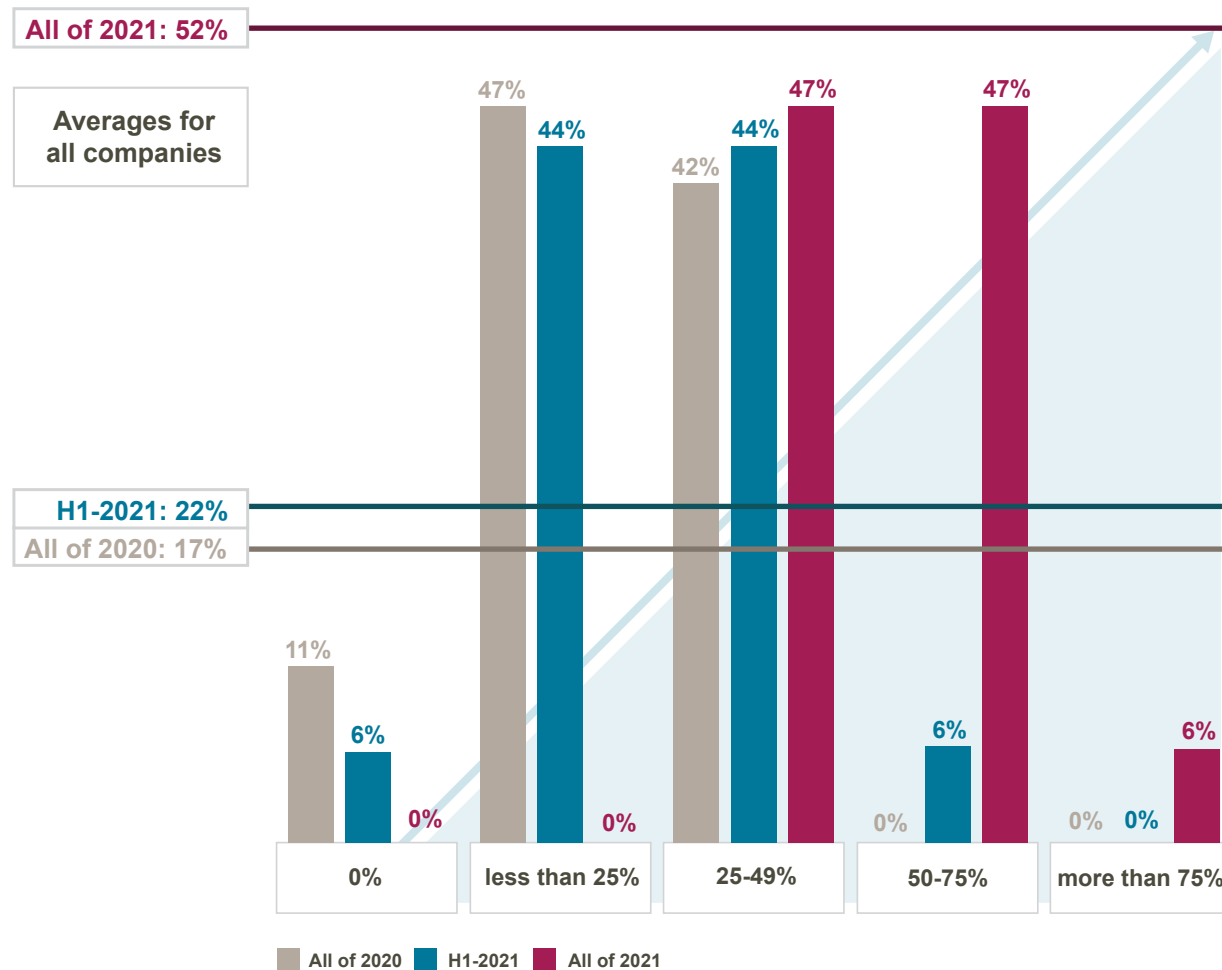
What do you believe would most help the “bounce back” of exhibitions?



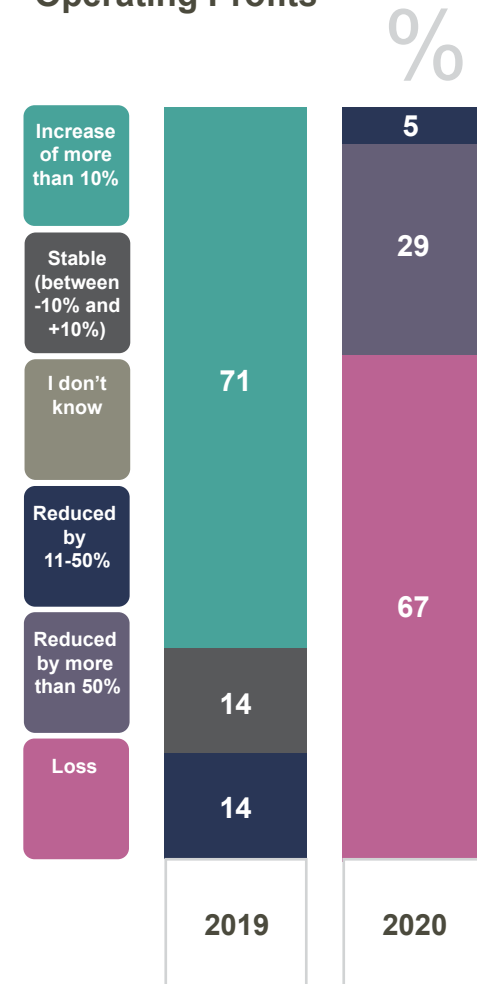
Detailed results for India



Revenue compared to 2019



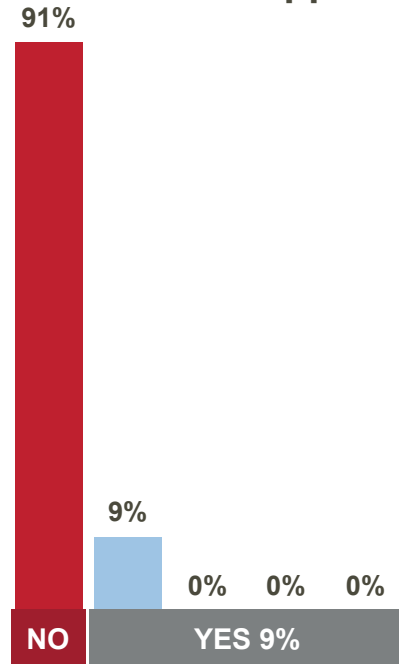
Operating Profits



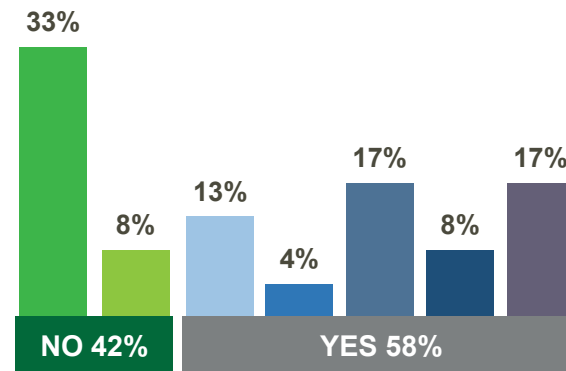
Detailed results for India



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
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- It's okay, we have extended our offering to other profitable work areas
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- I'm afraid we'd have to close down

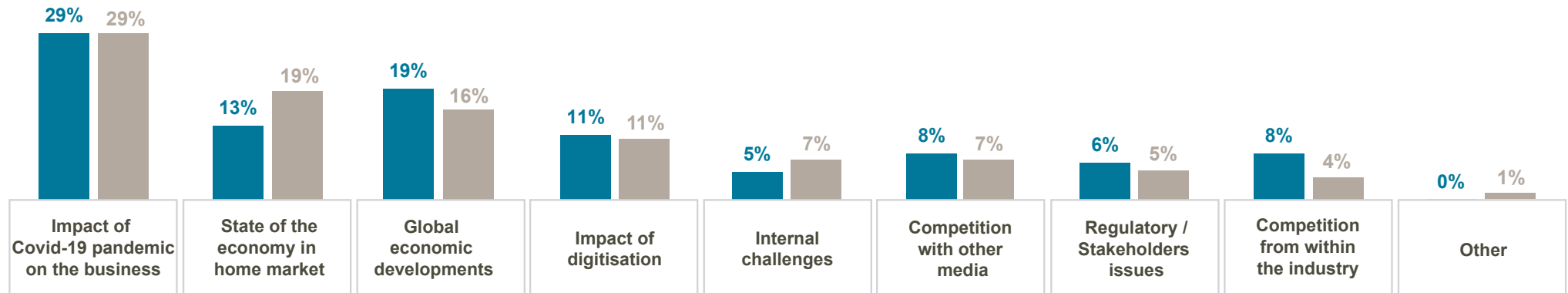
Detailed results for India



Most important business issues in the exhibition industry

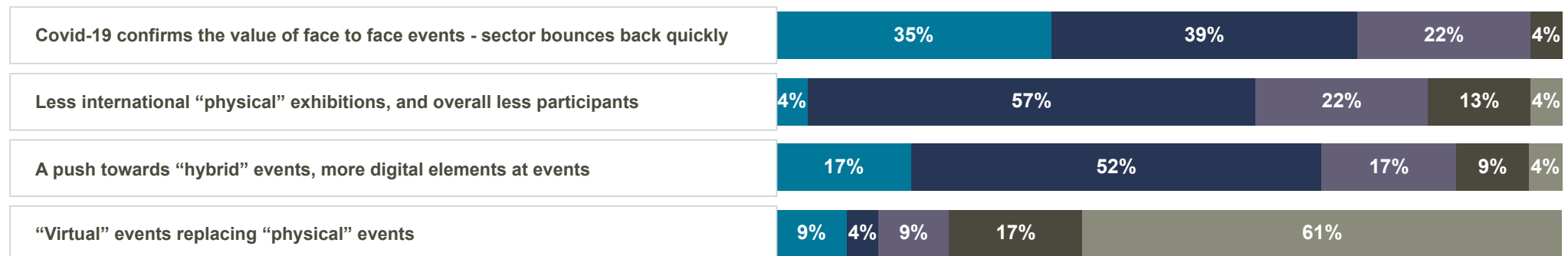
India

Global

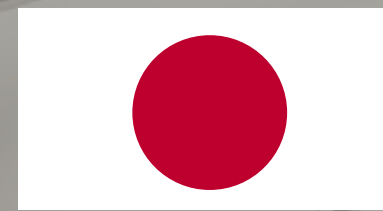


Format of exhibitions in the coming years

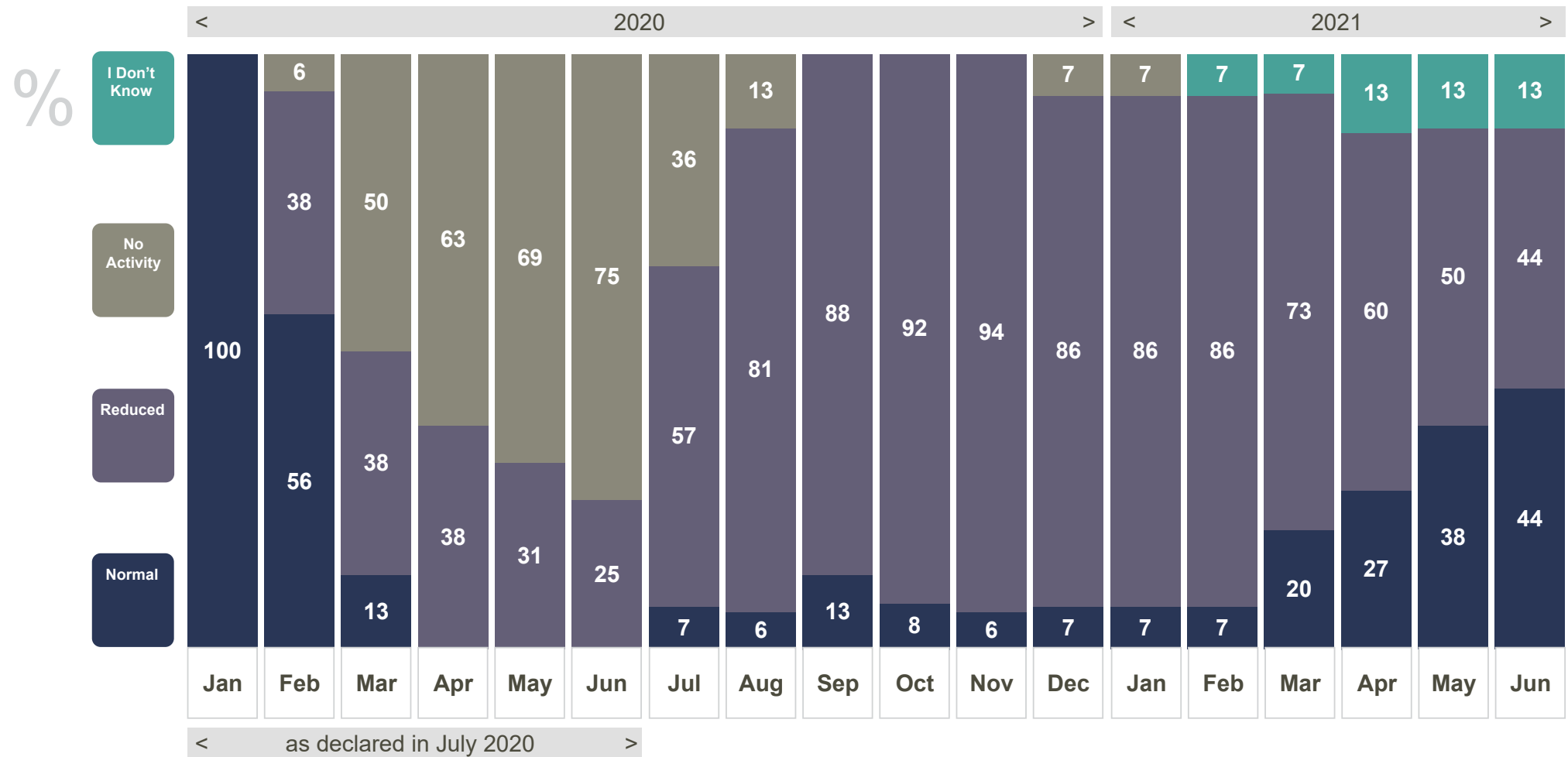
Yes, for sure Most probably Not sure Not sure at all Definitely not



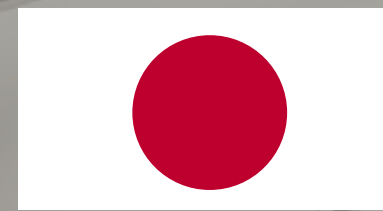
Detailed results for Japan



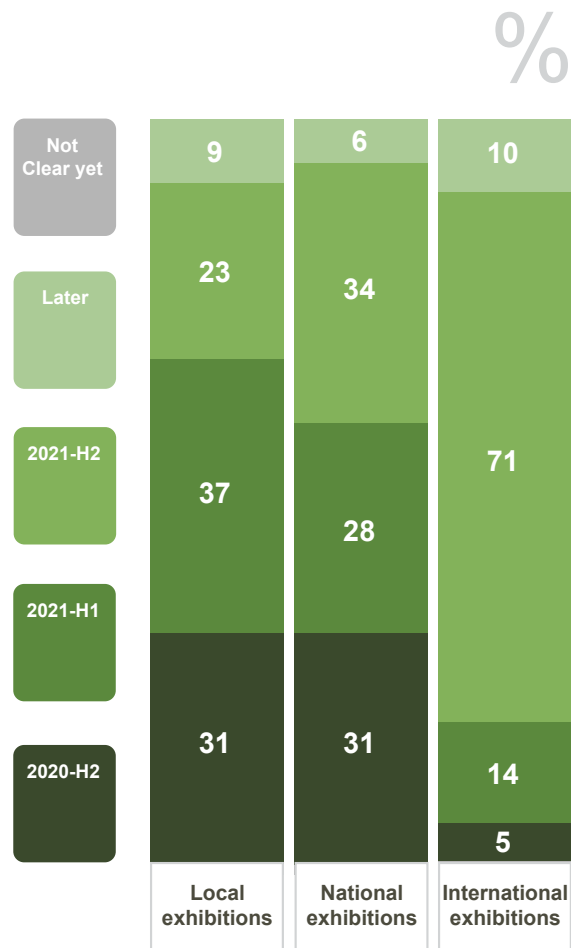
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



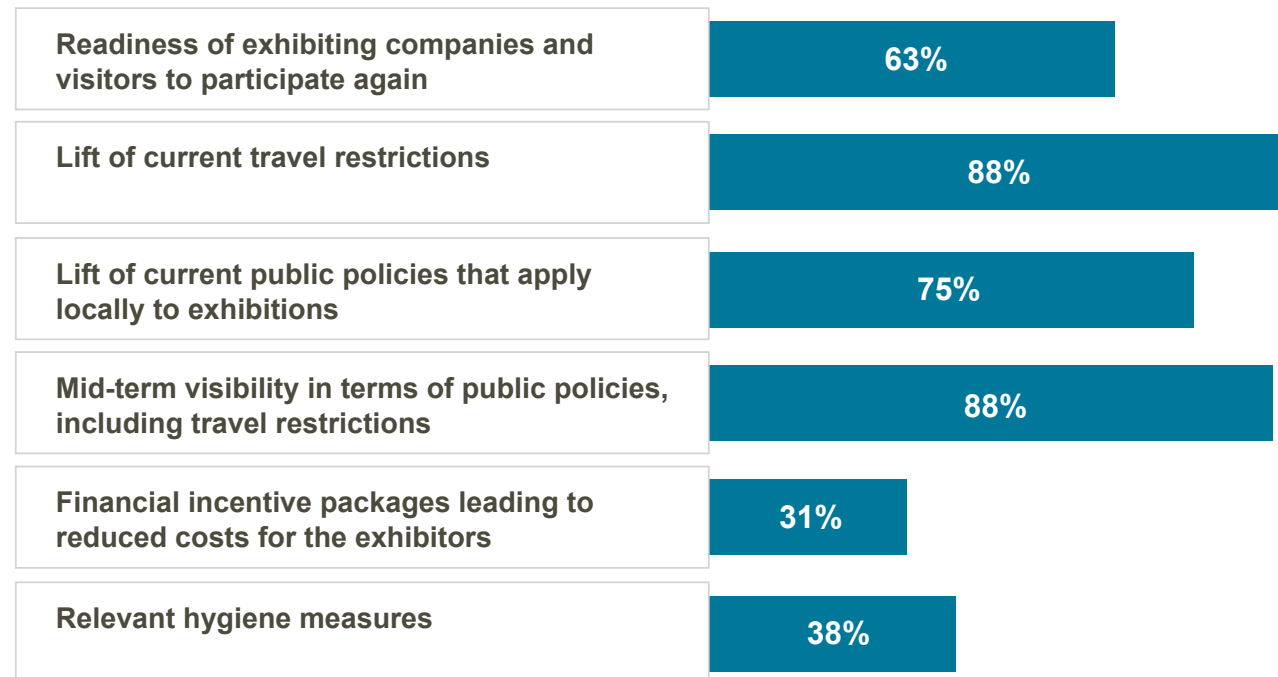
Detailed results for Japan



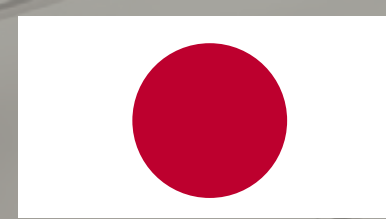
When do you believe exhibitions will open again in your city?



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

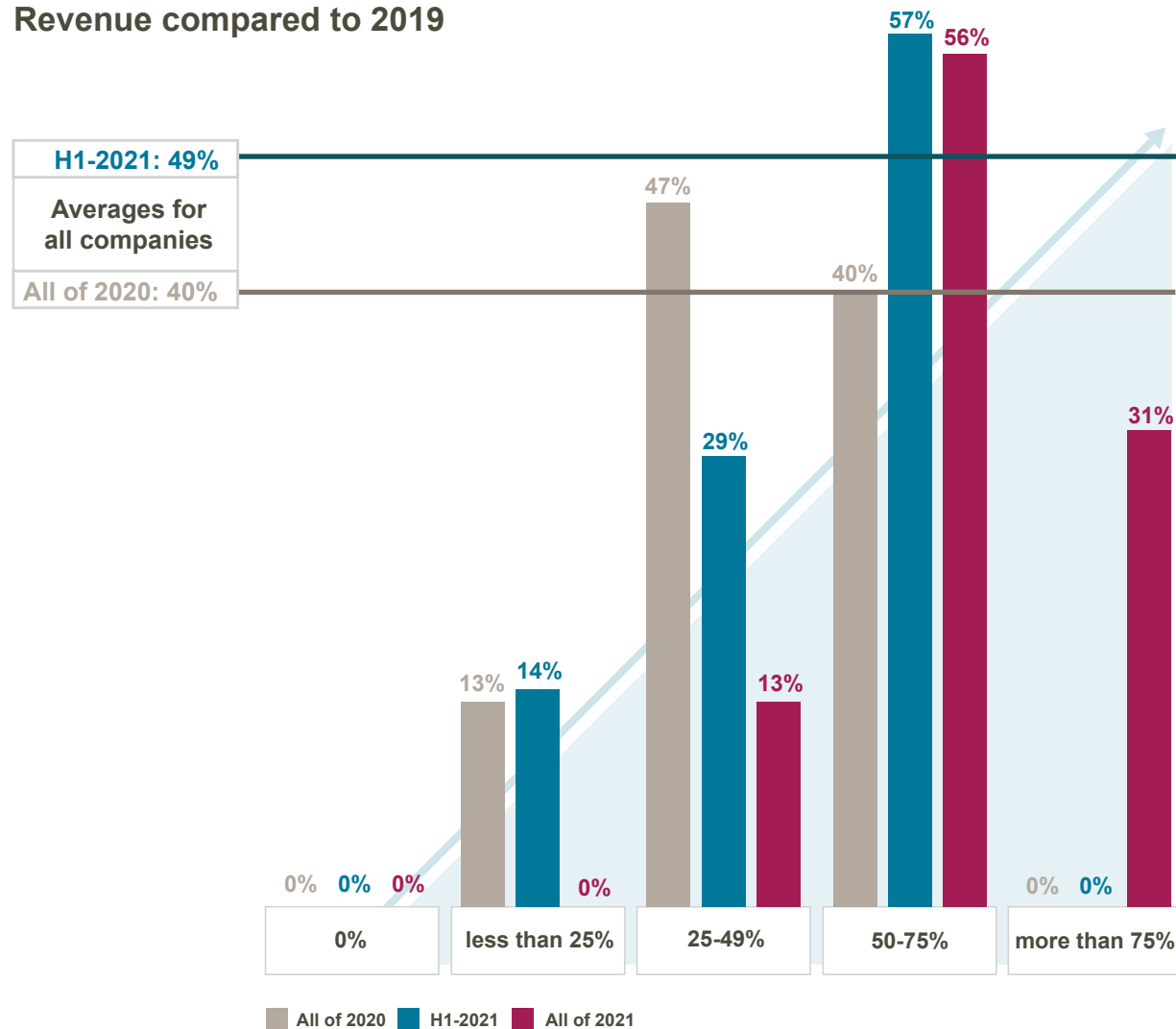


Detailed results for Japan

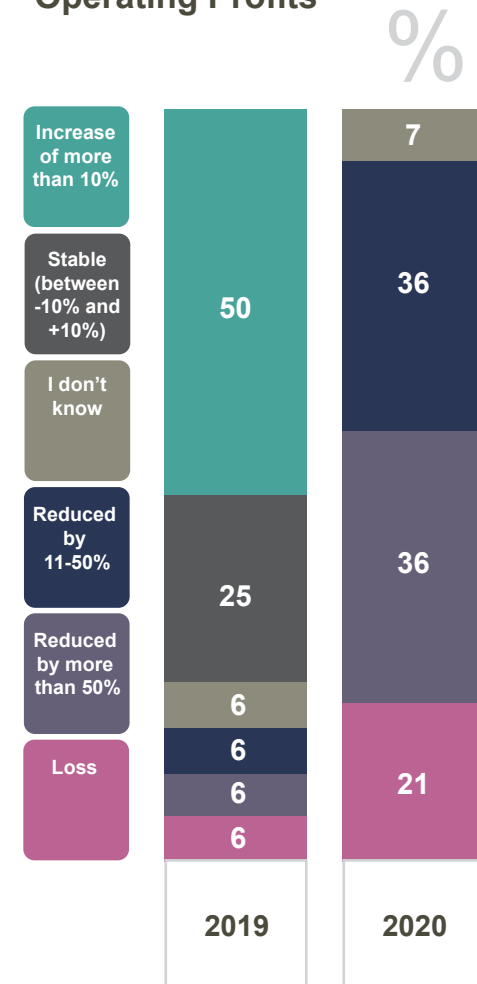


All of 2021: 69%

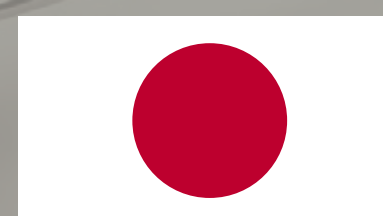
Revenue compared to 2019



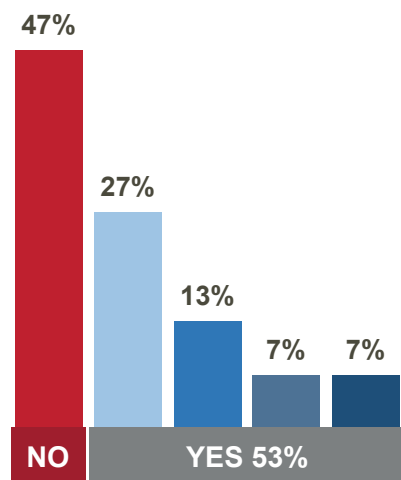
Operating Profits



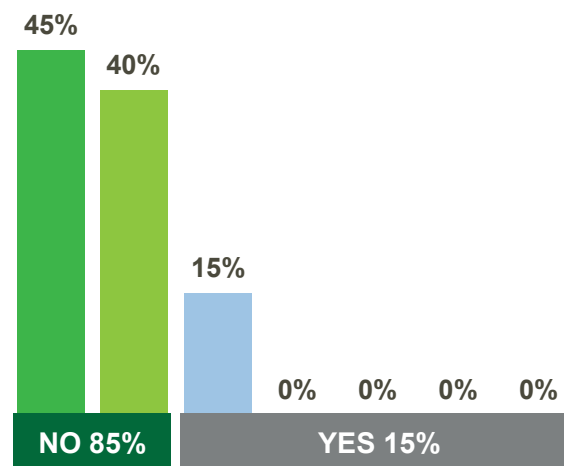
Detailed results for Japan



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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

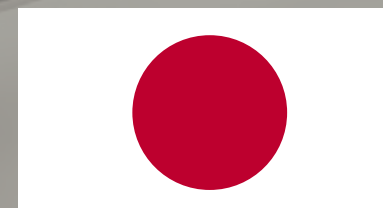


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
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- It's okay, we have extended our offering to other profitable work areas
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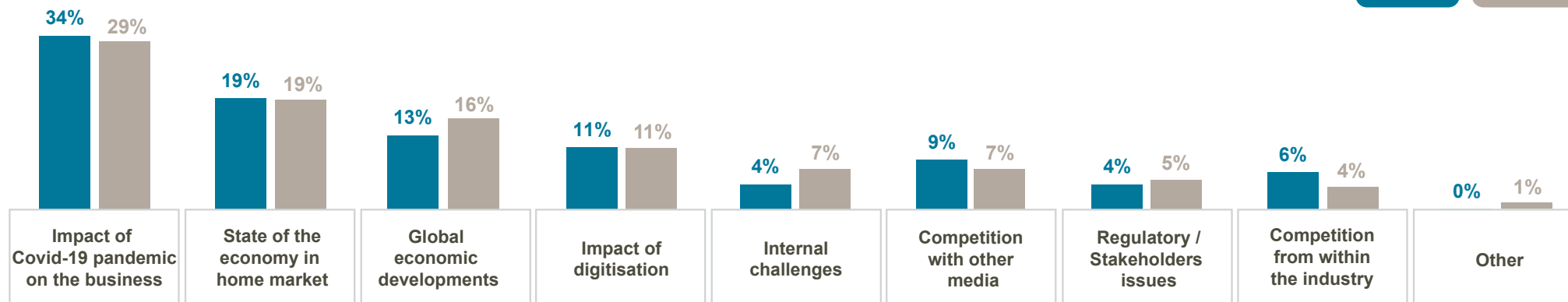
Detailed results for Japan



Most important business issues in the exhibition industry

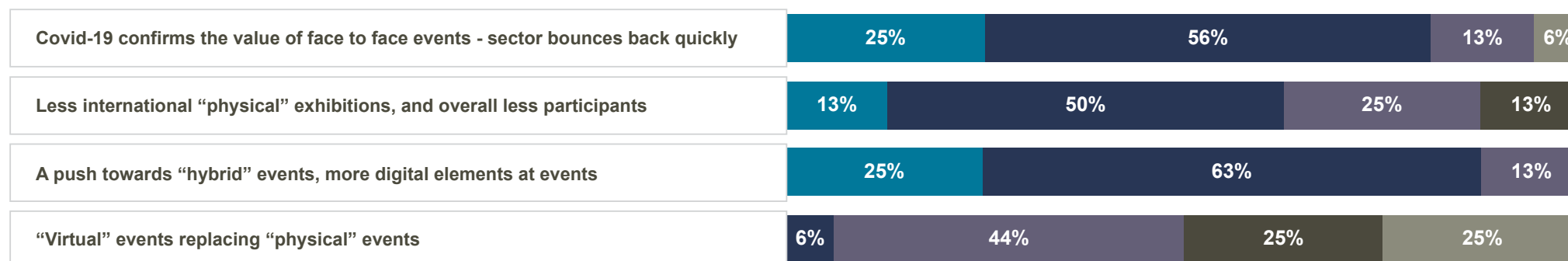
Japan

Global

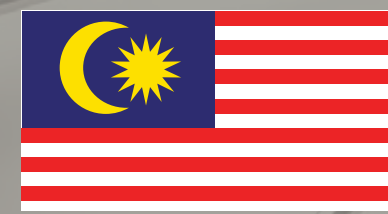


Format of exhibitions in the coming years

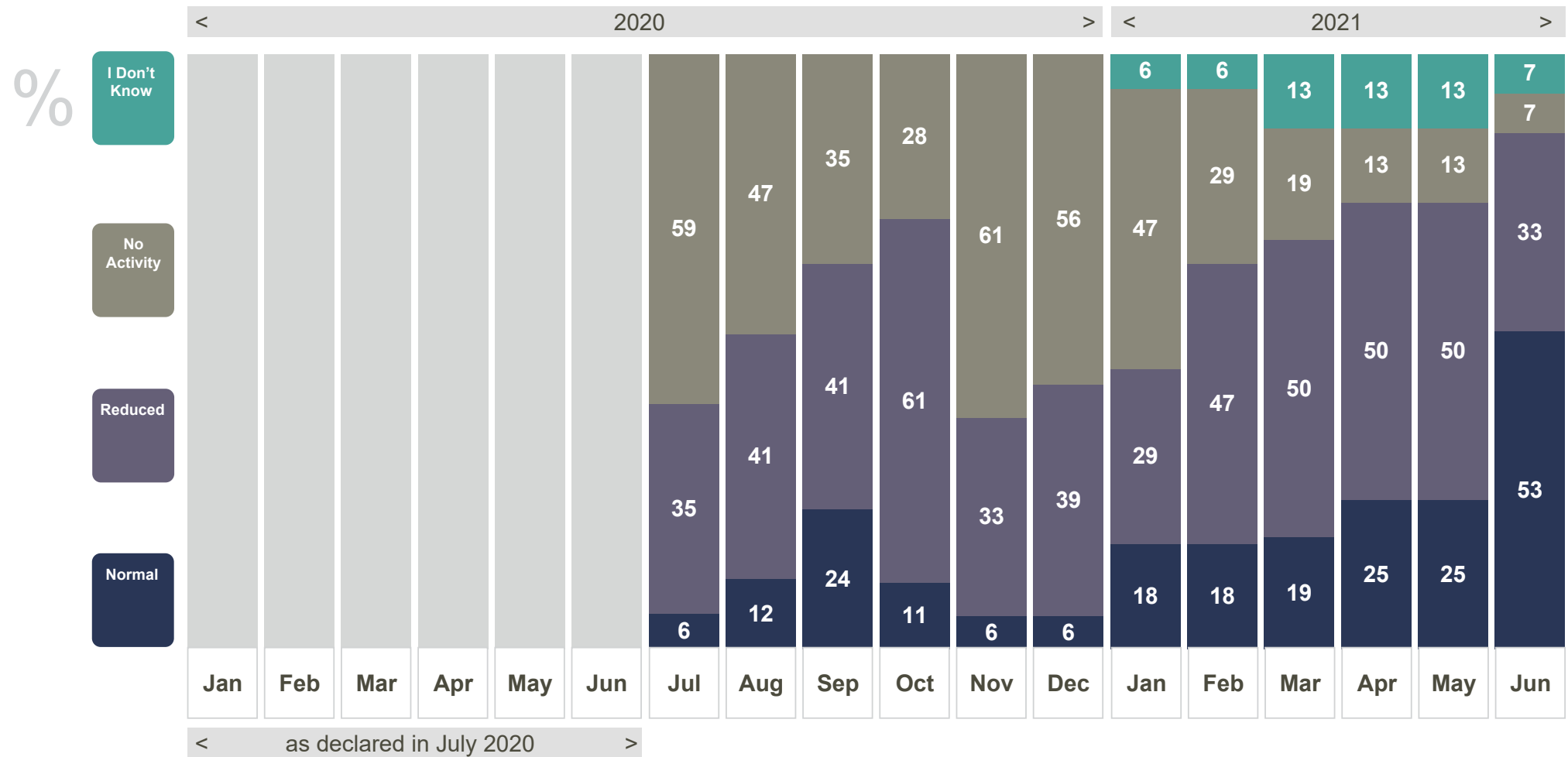
Yes, for sure Most probably Not sure Not sure at all Definitely not



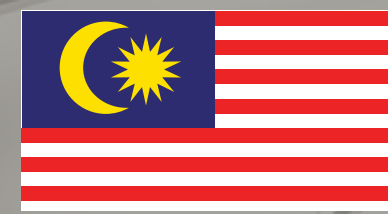
Detailed results for Malaysia



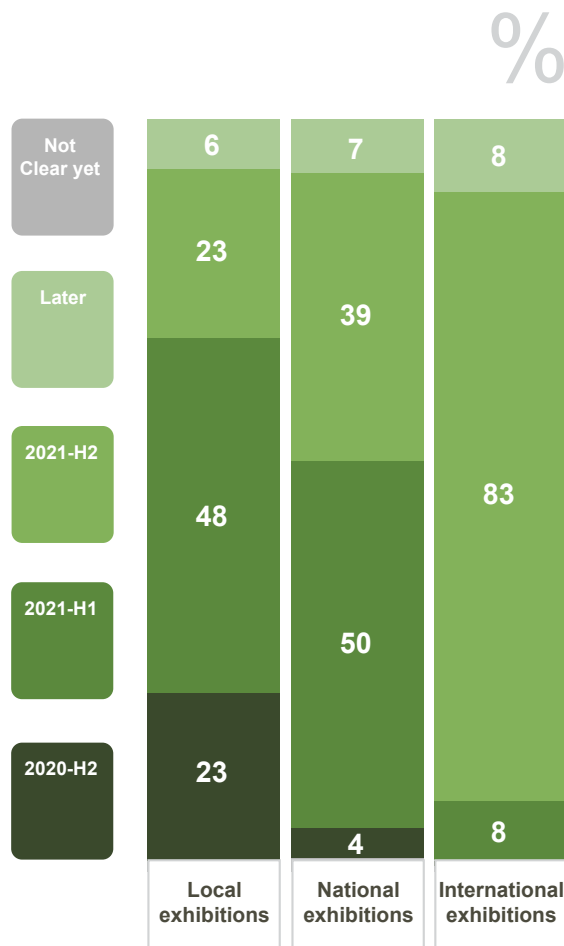
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



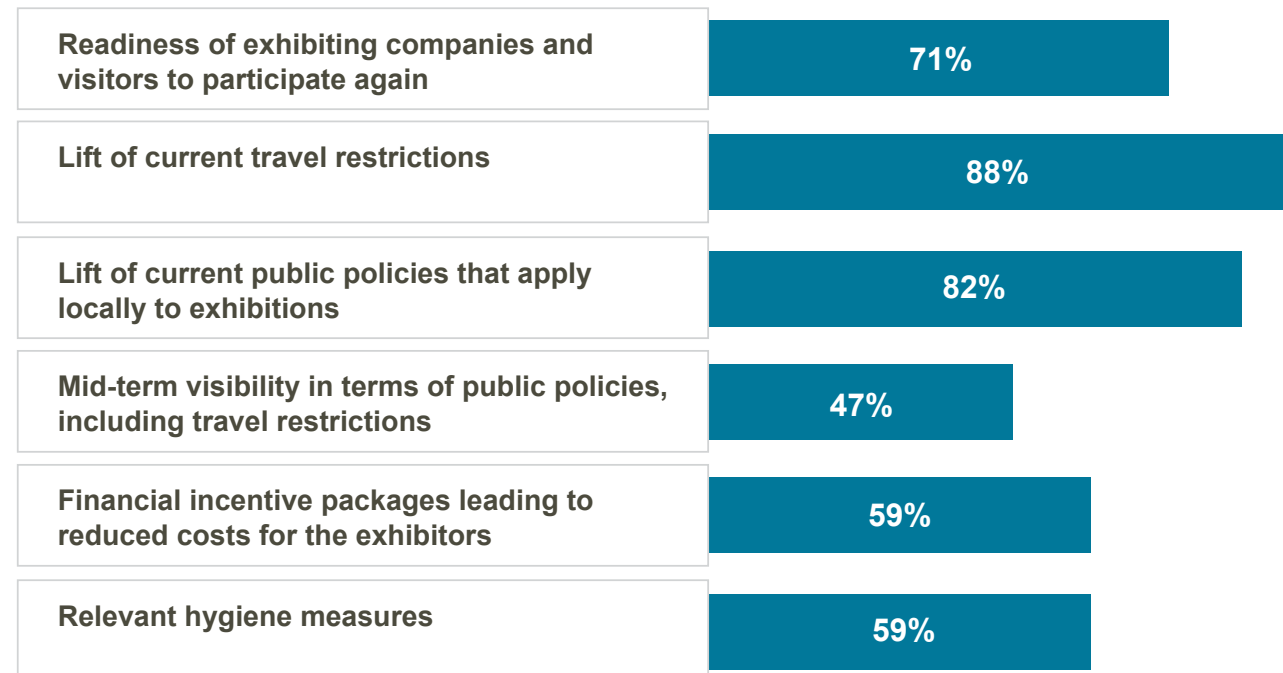
Detailed results for Malaysia



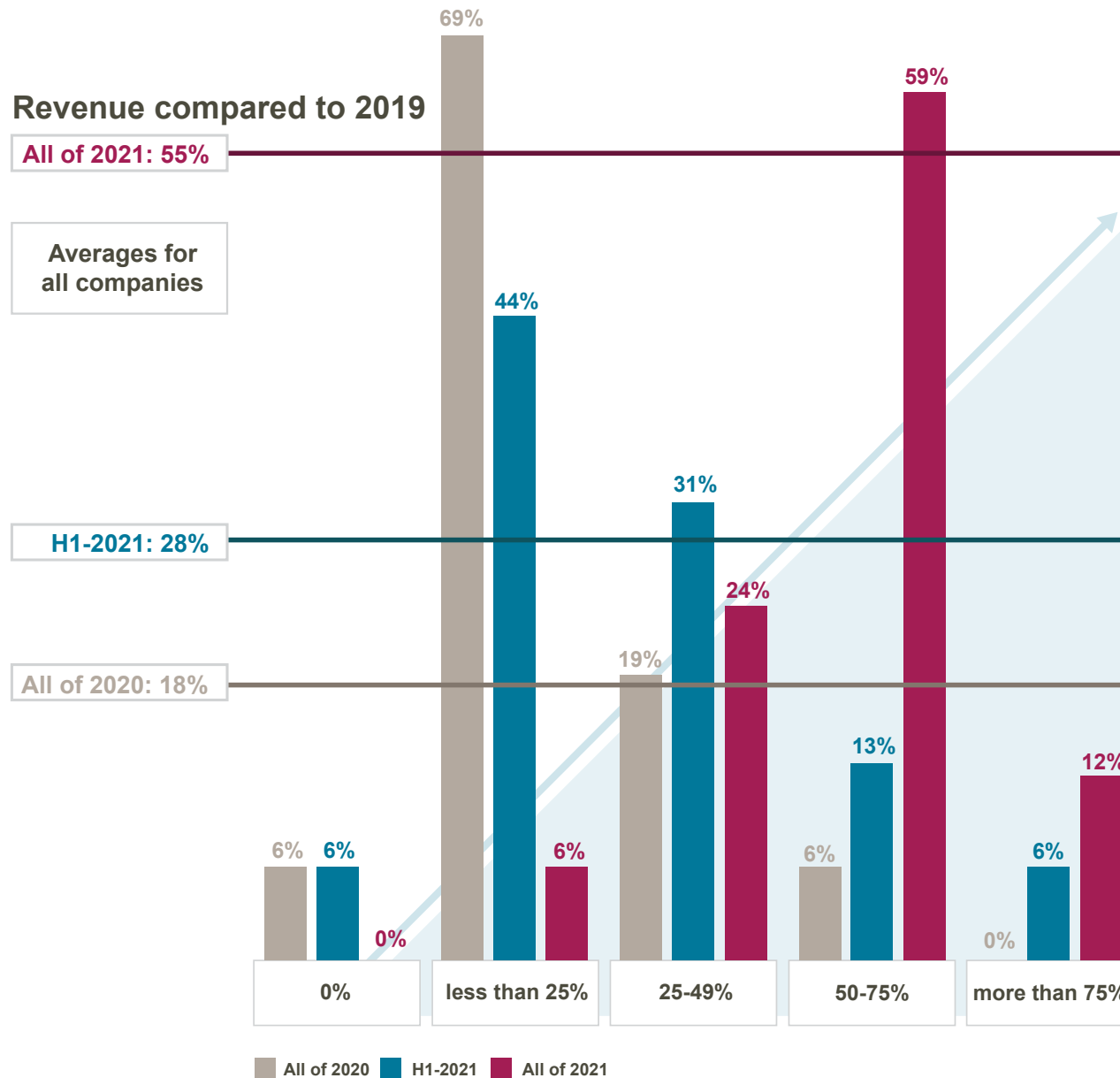
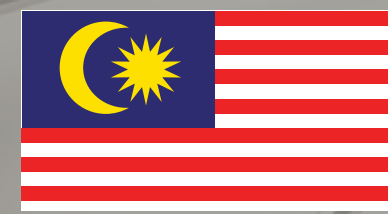
When do you believe exhibitions will open again in your city?



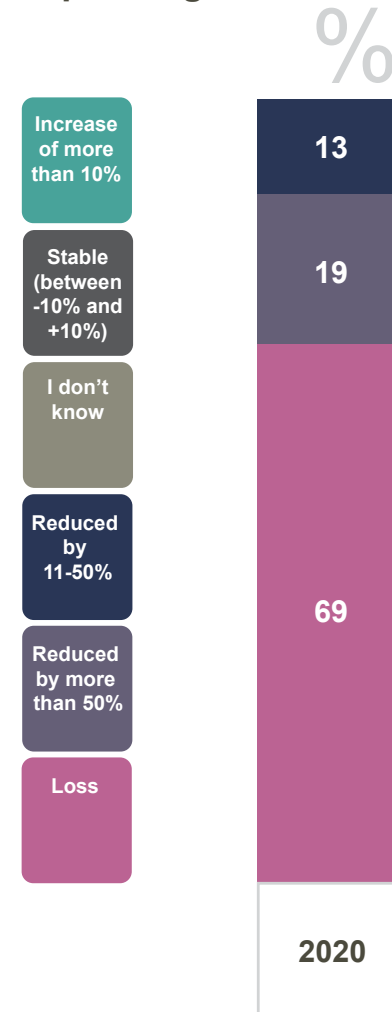
What do you believe would most help the “bounce back” of exhibitions?



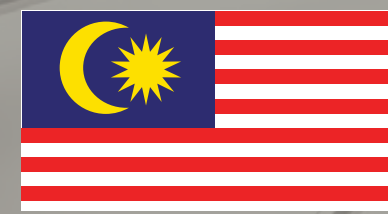
Detailed results for Malaysia



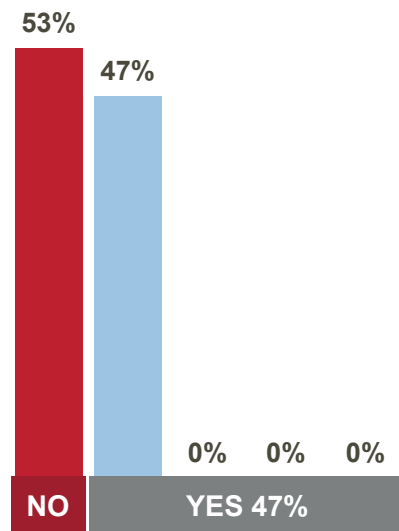
Operating Profits



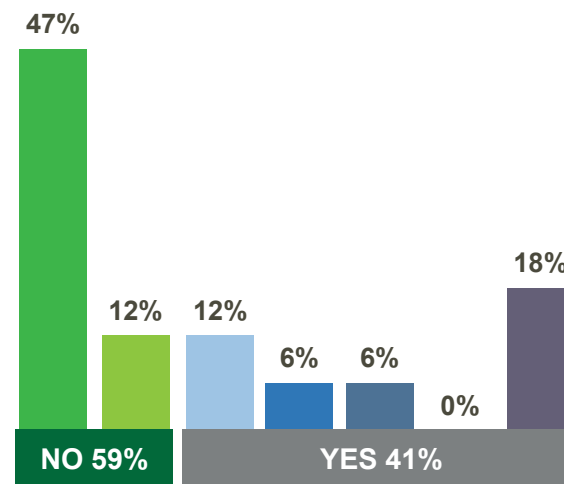
Detailed results for Malaysia



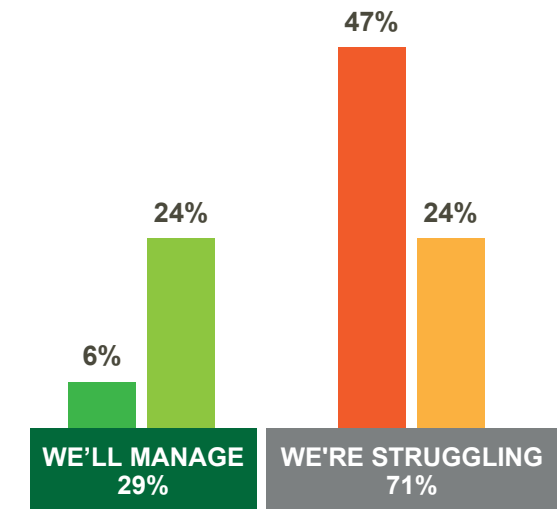
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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

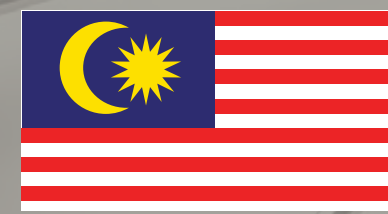


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
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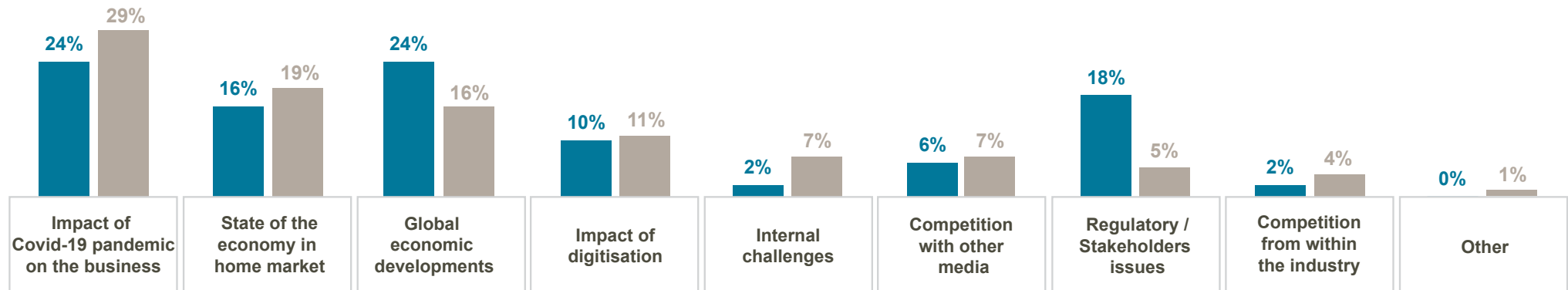
Detailed results for Malaysia



Most important business issues in the exhibition industry

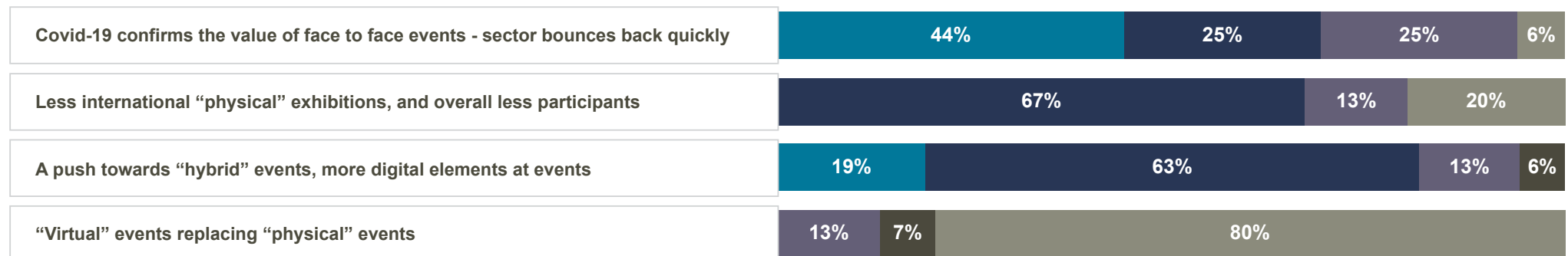
Malaysia

Global



Format of exhibitions in the coming years

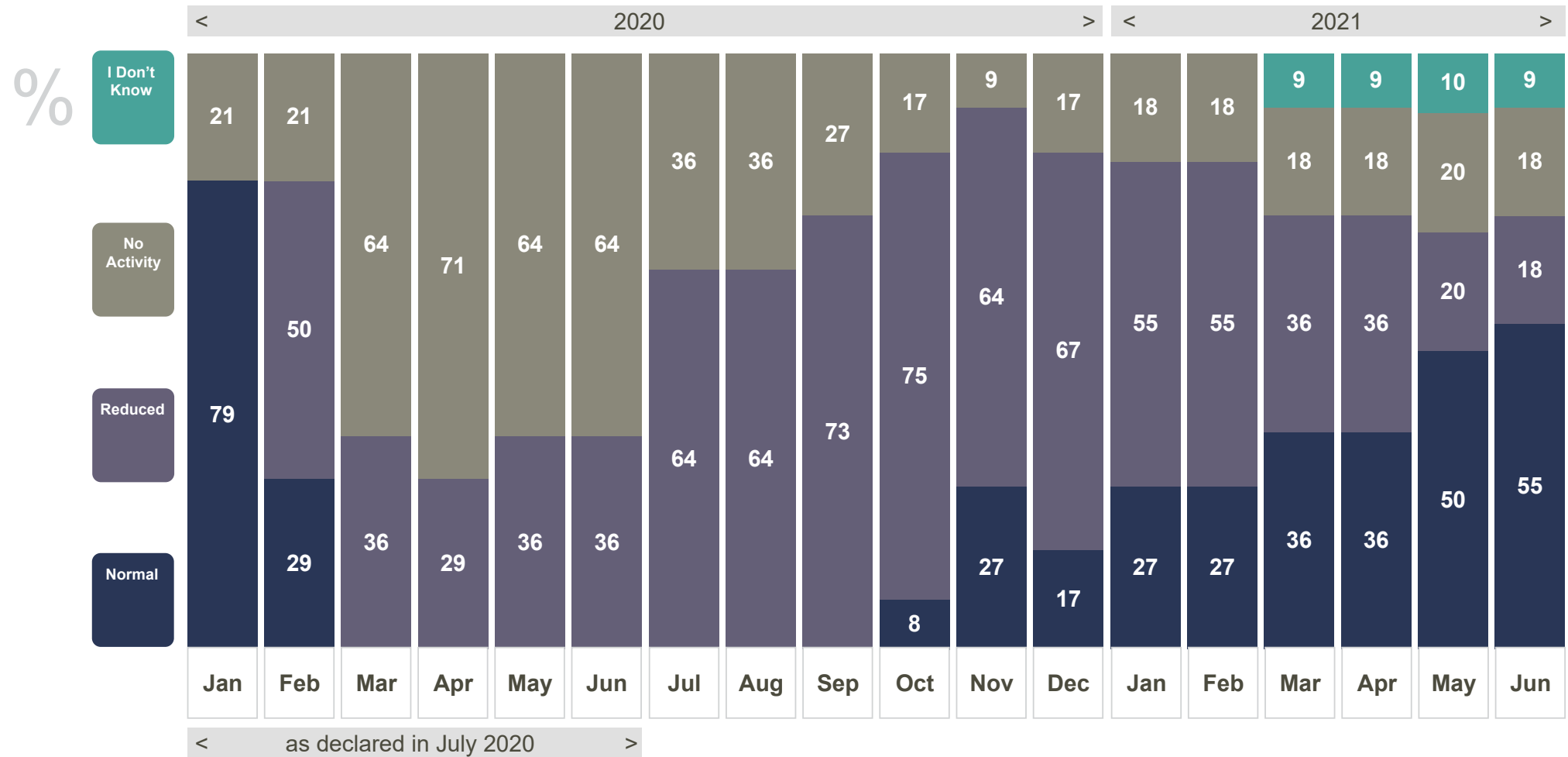
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Singapore



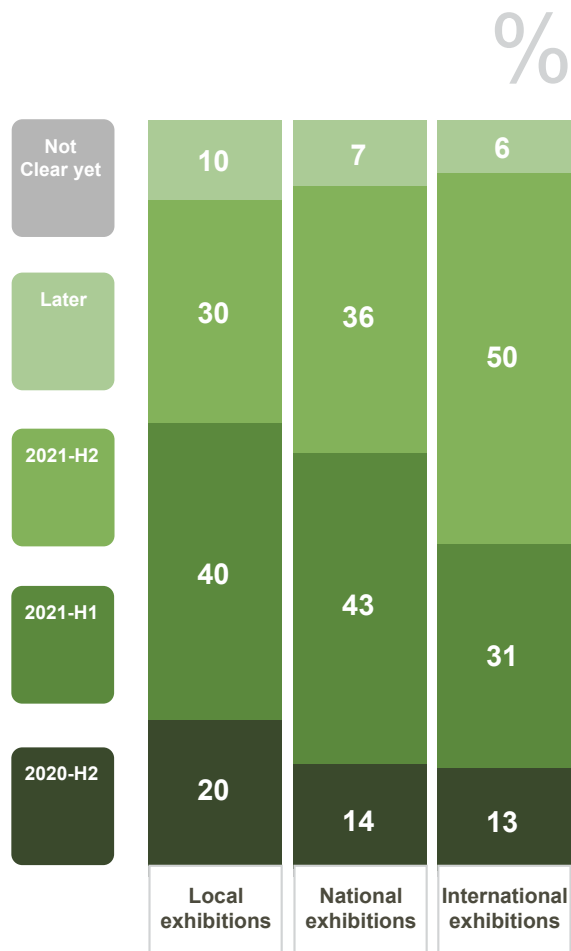
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



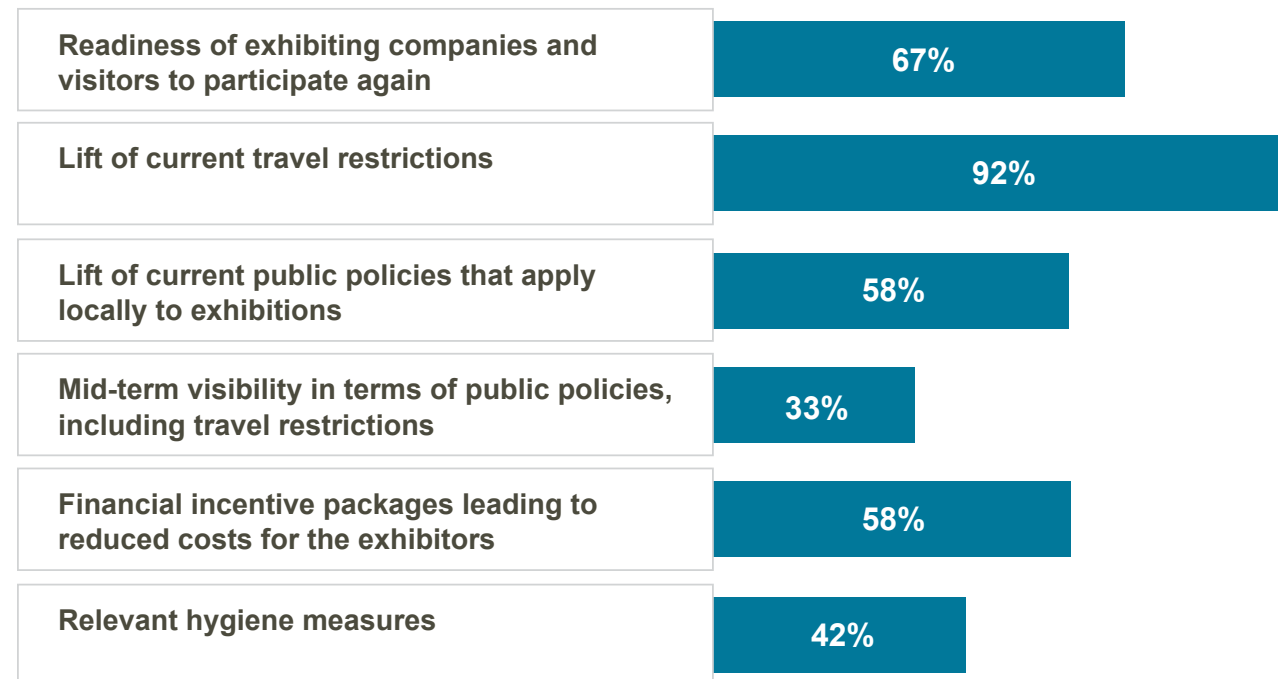
Detailed results for Singapore



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



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

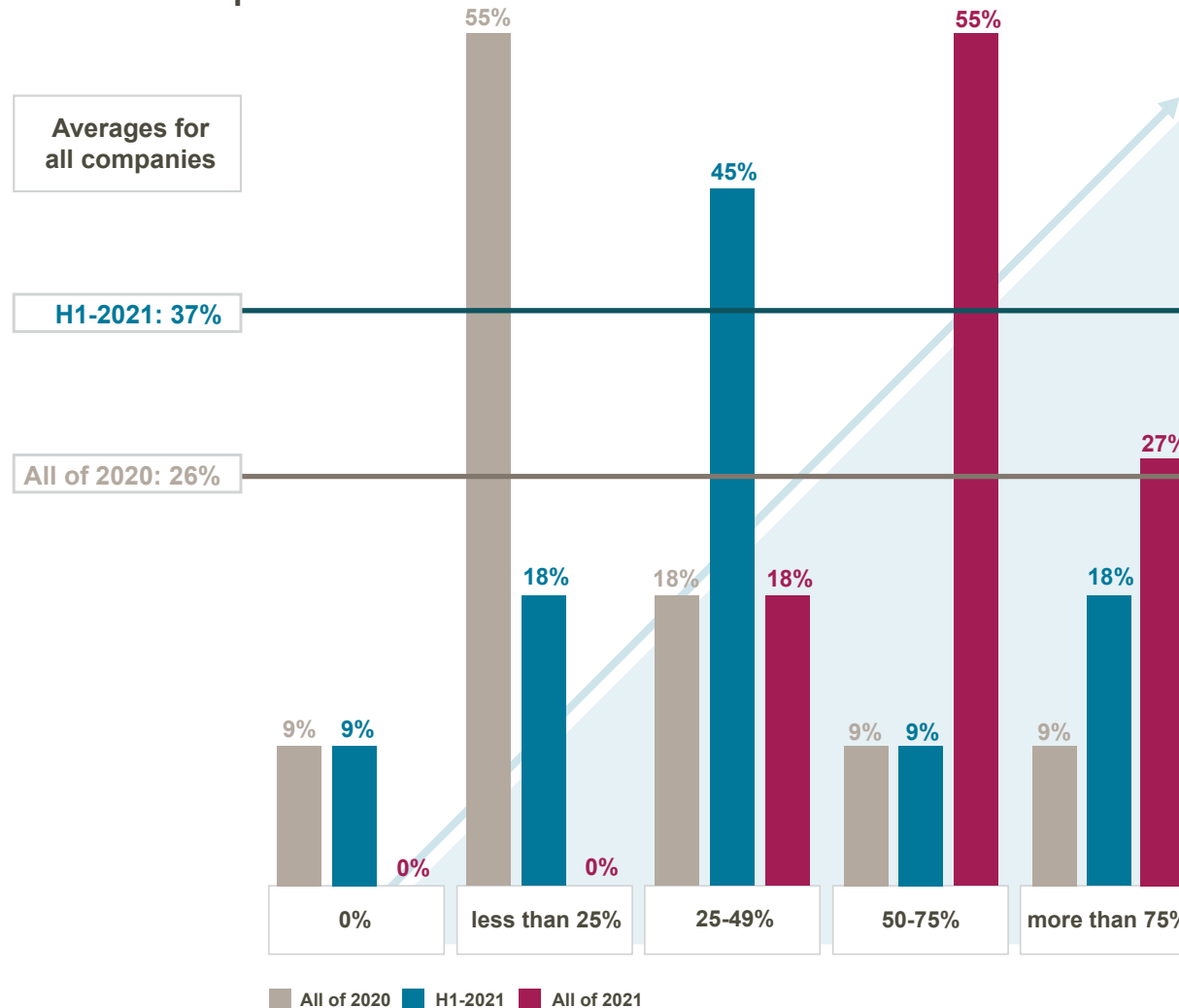


Detailed results for Singapore

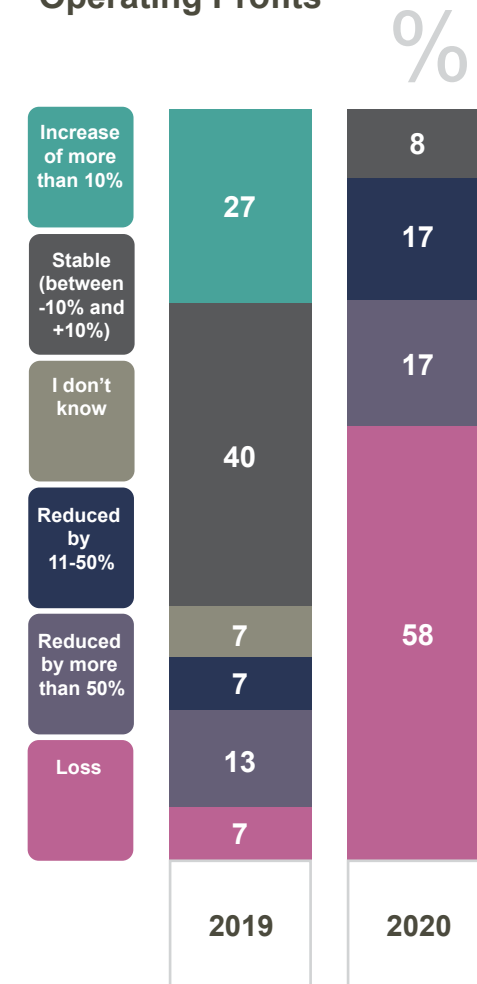


All of 2021: 70%

Revenue compared to 2019



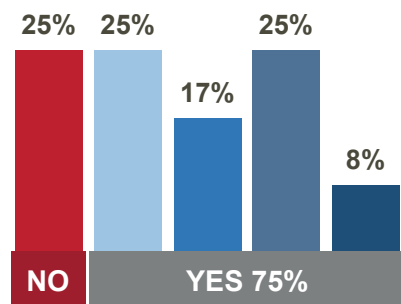
Operating Profits



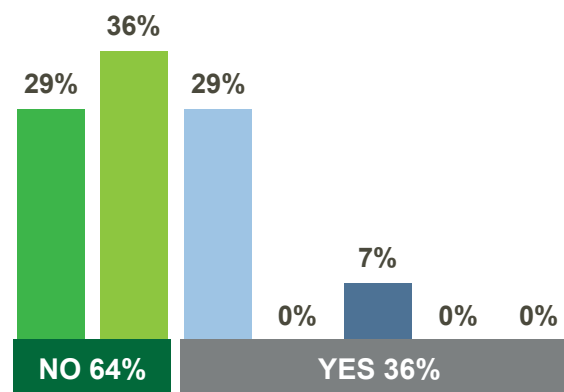
Detailed results for Singapore



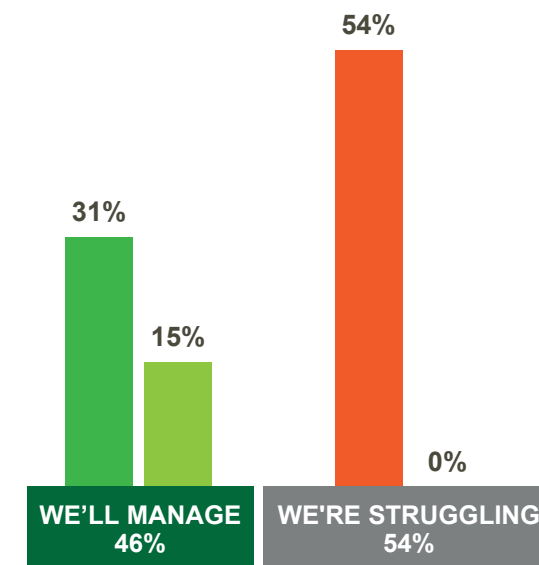
Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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

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

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

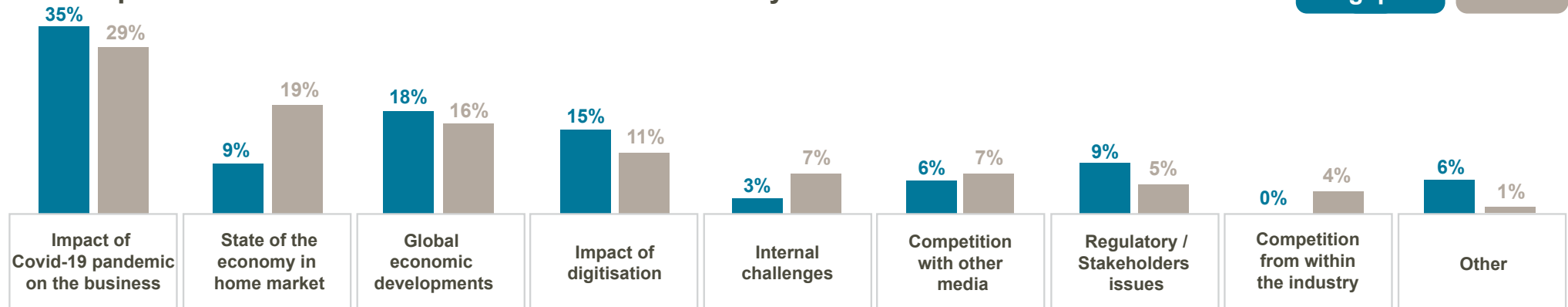
Detailed results for Singapore



Most important business issues in the exhibition industry

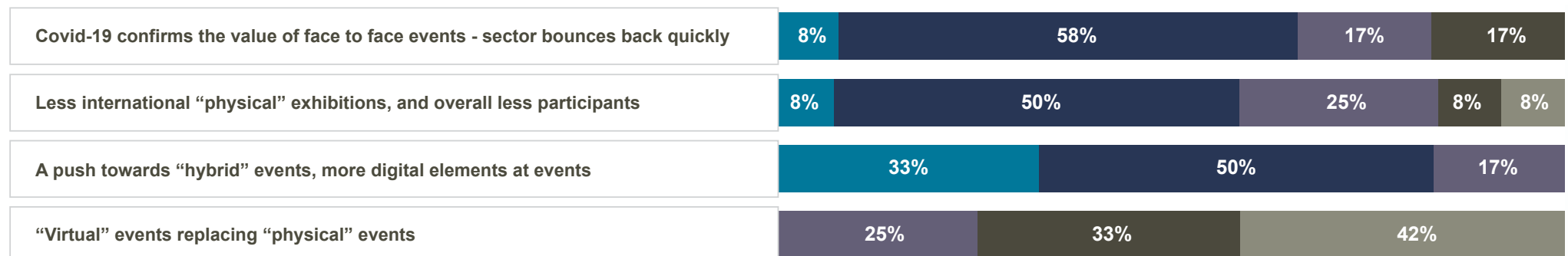
Singapore

Global



Format of exhibitions in the coming years

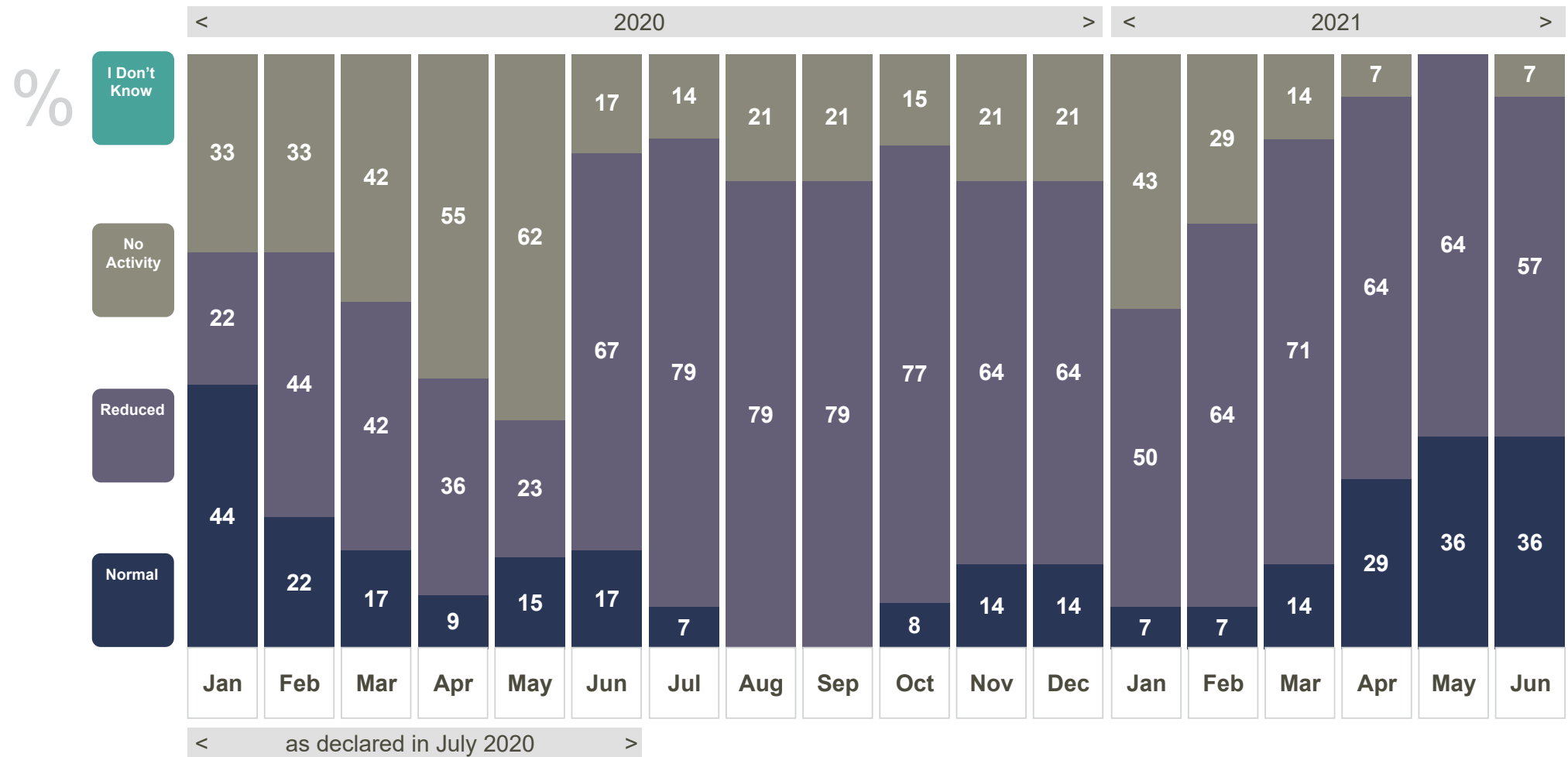
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for South Korea



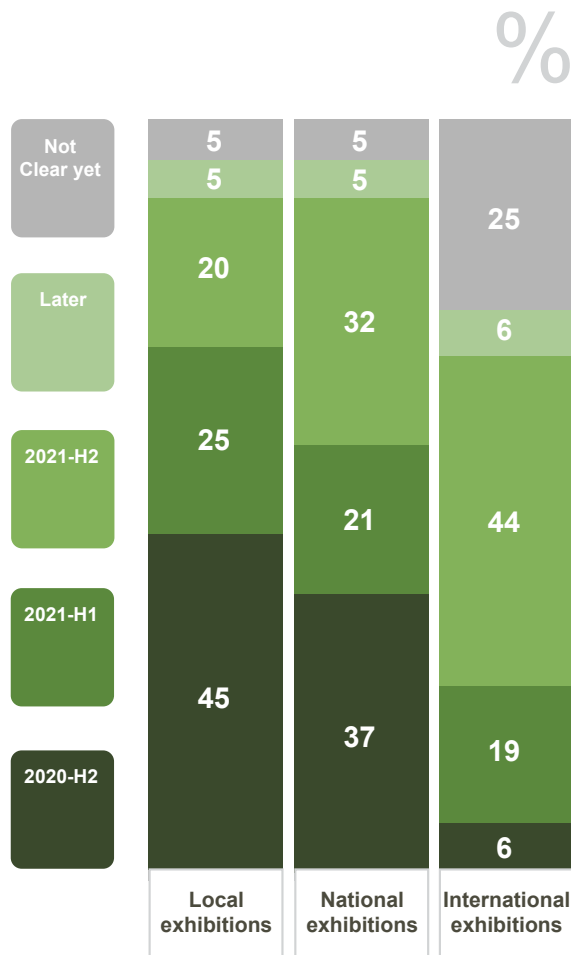
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



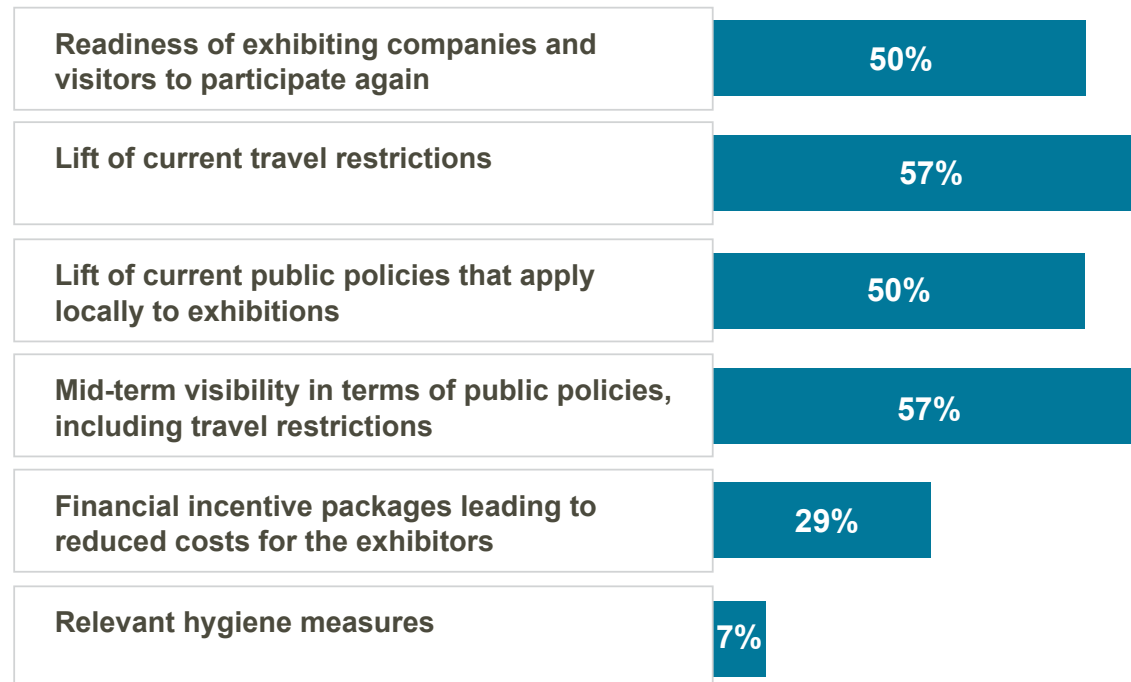
Detailed results for South Korea



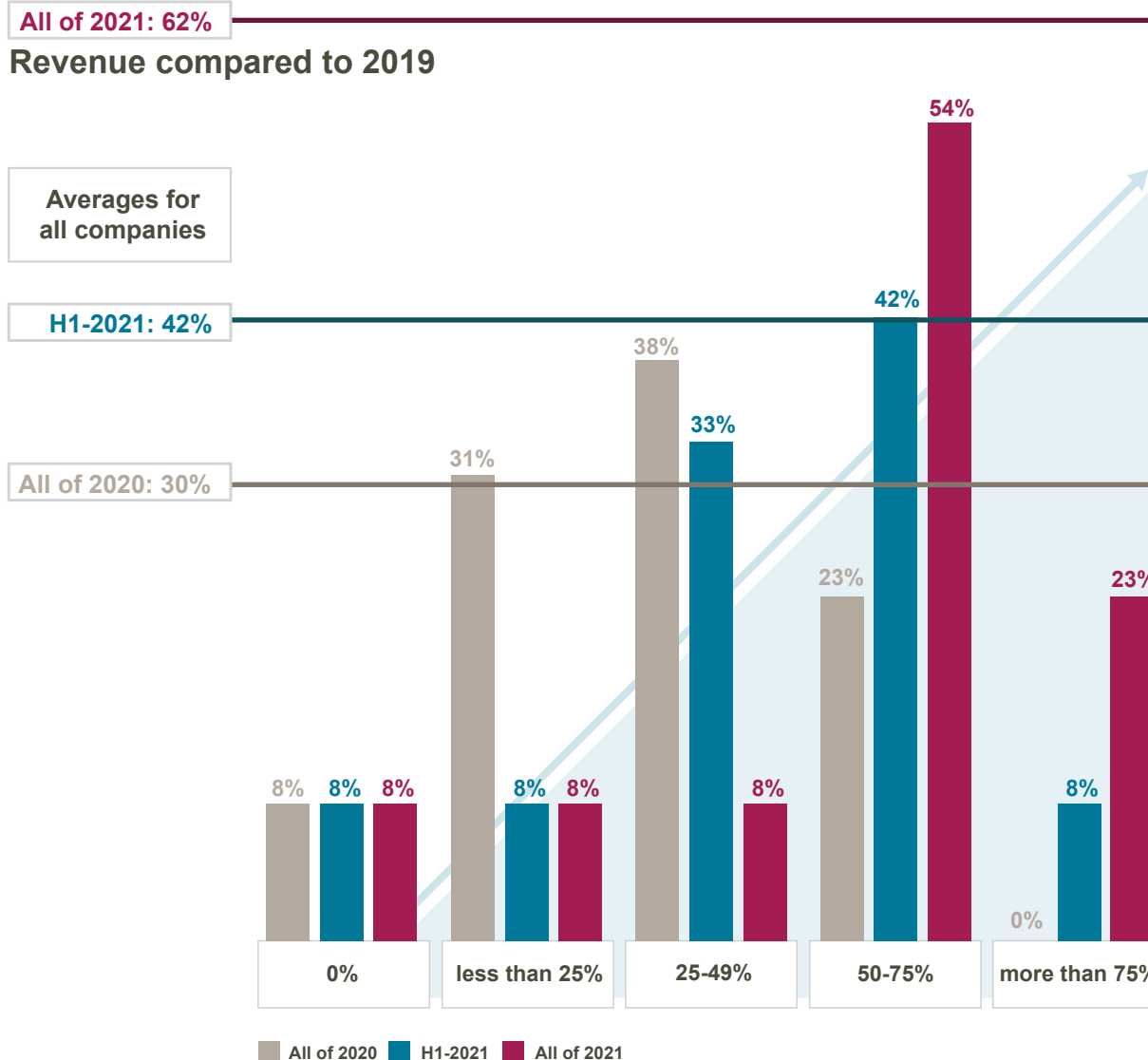
When do you believe exhibitions will open again in your city?



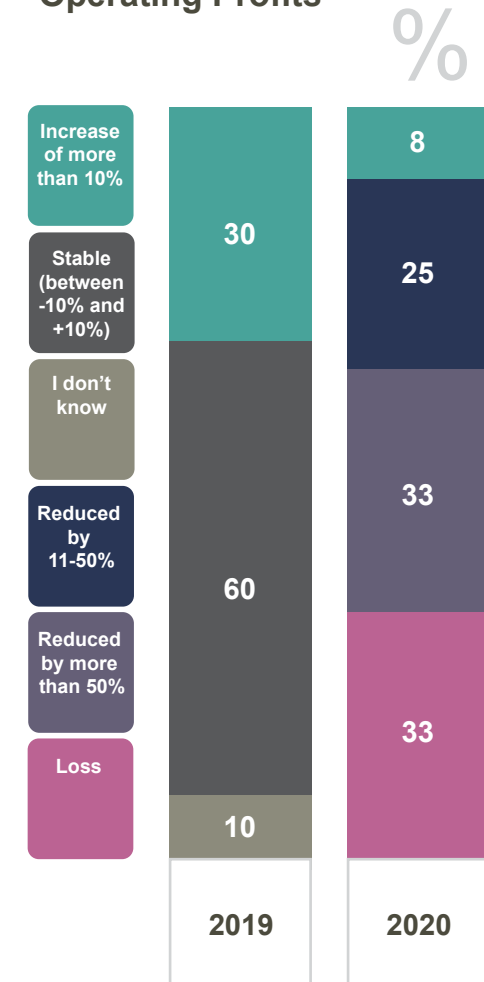
What do you believe would most help the “bounce back” of exhibitions?



Detailed results for South Korea



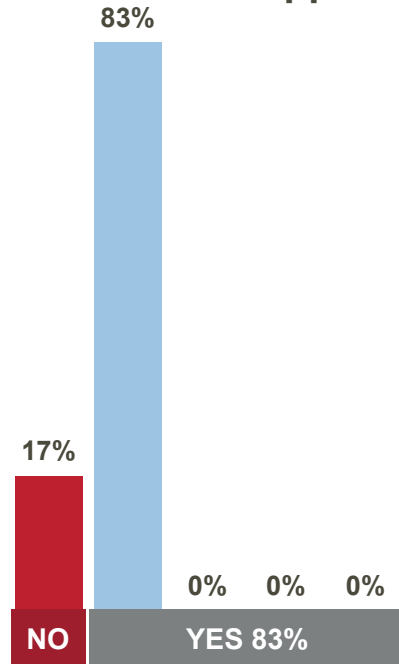
Operating Profits



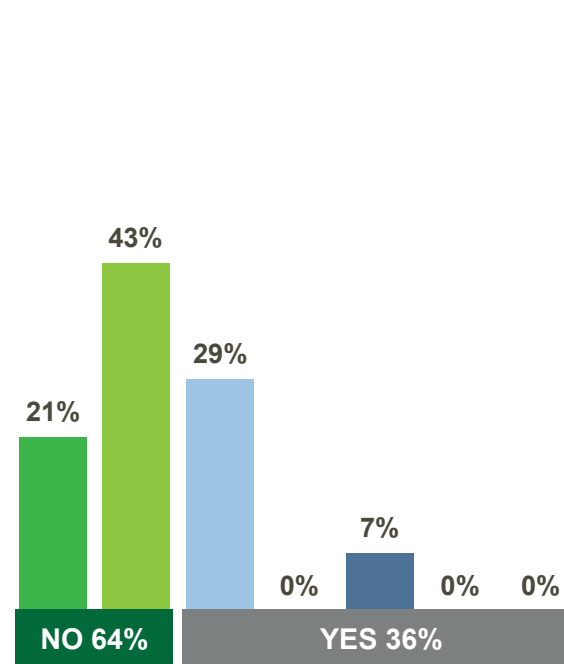
Detailed results for South Korea



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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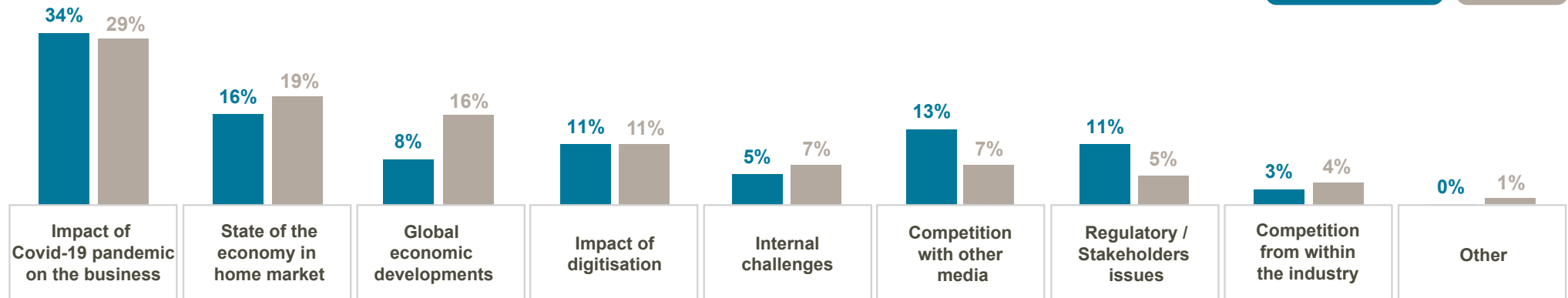
Detailed results for South Korea



Most important business issues in the exhibition industry

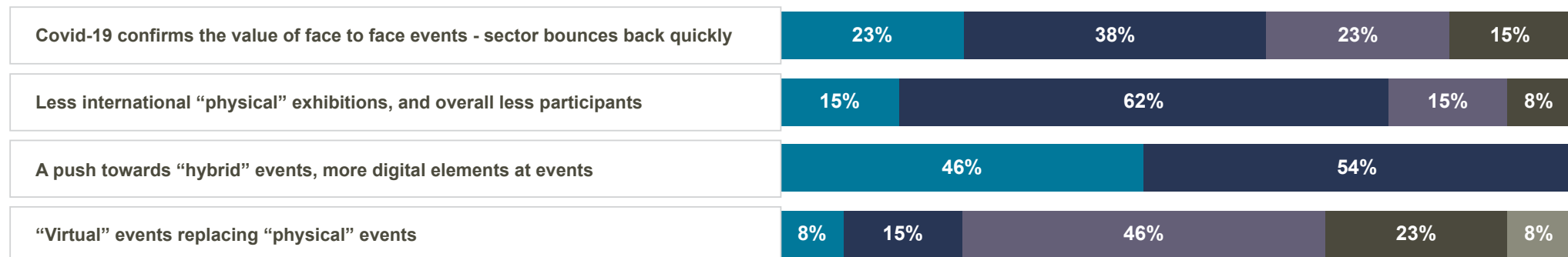
South Korea

Global



Format of exhibitions in the coming years

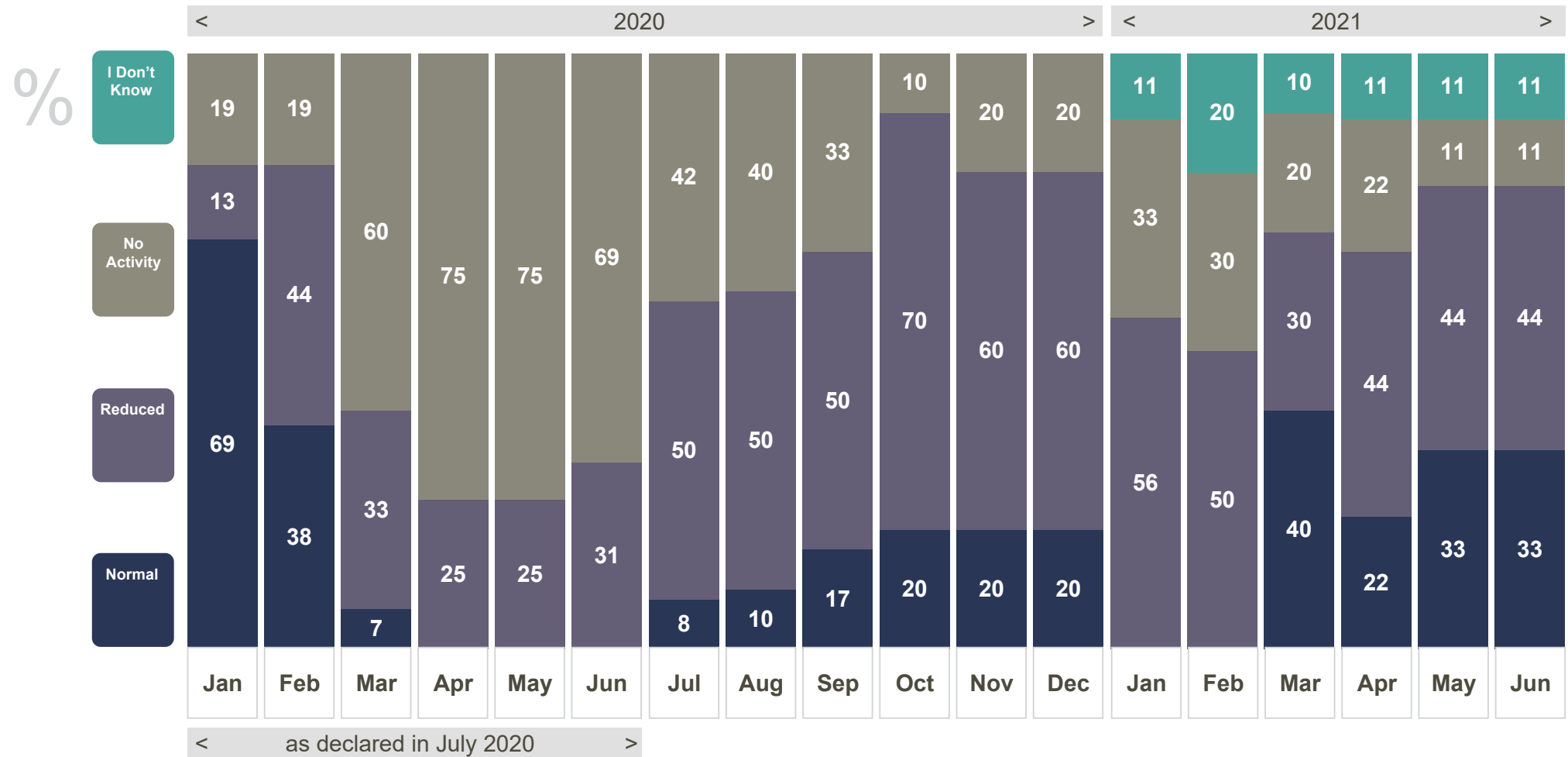
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Thailand



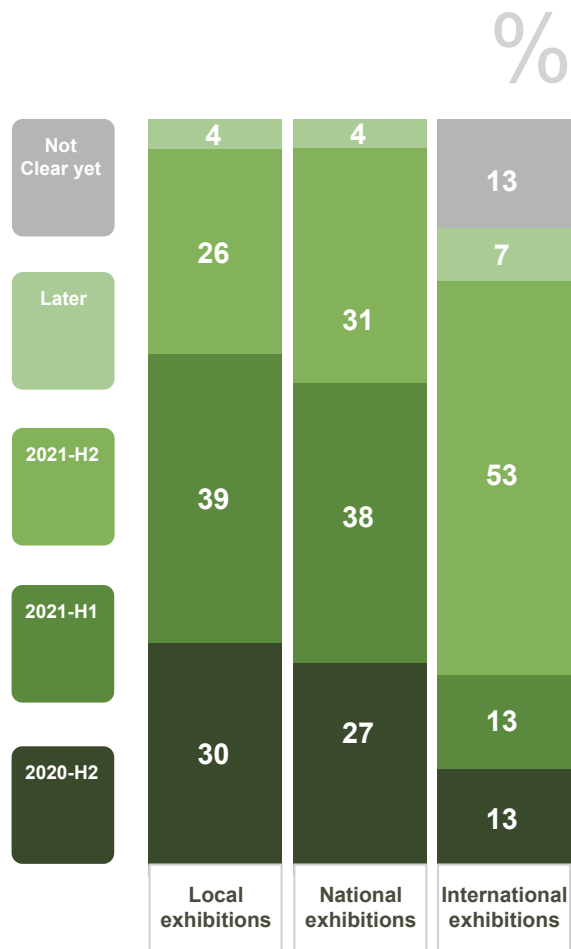
Situation of industry operations in 2020 and current predictions for the 1st half of 2021



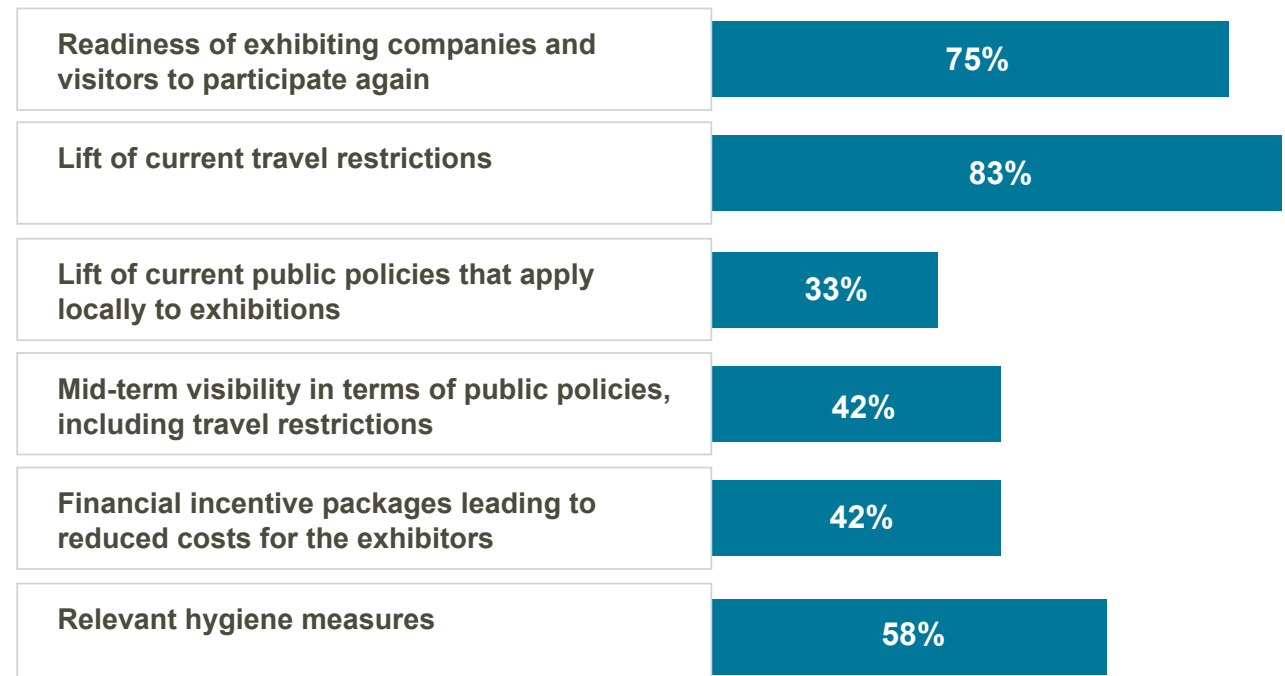
Detailed results for Thailand



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



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

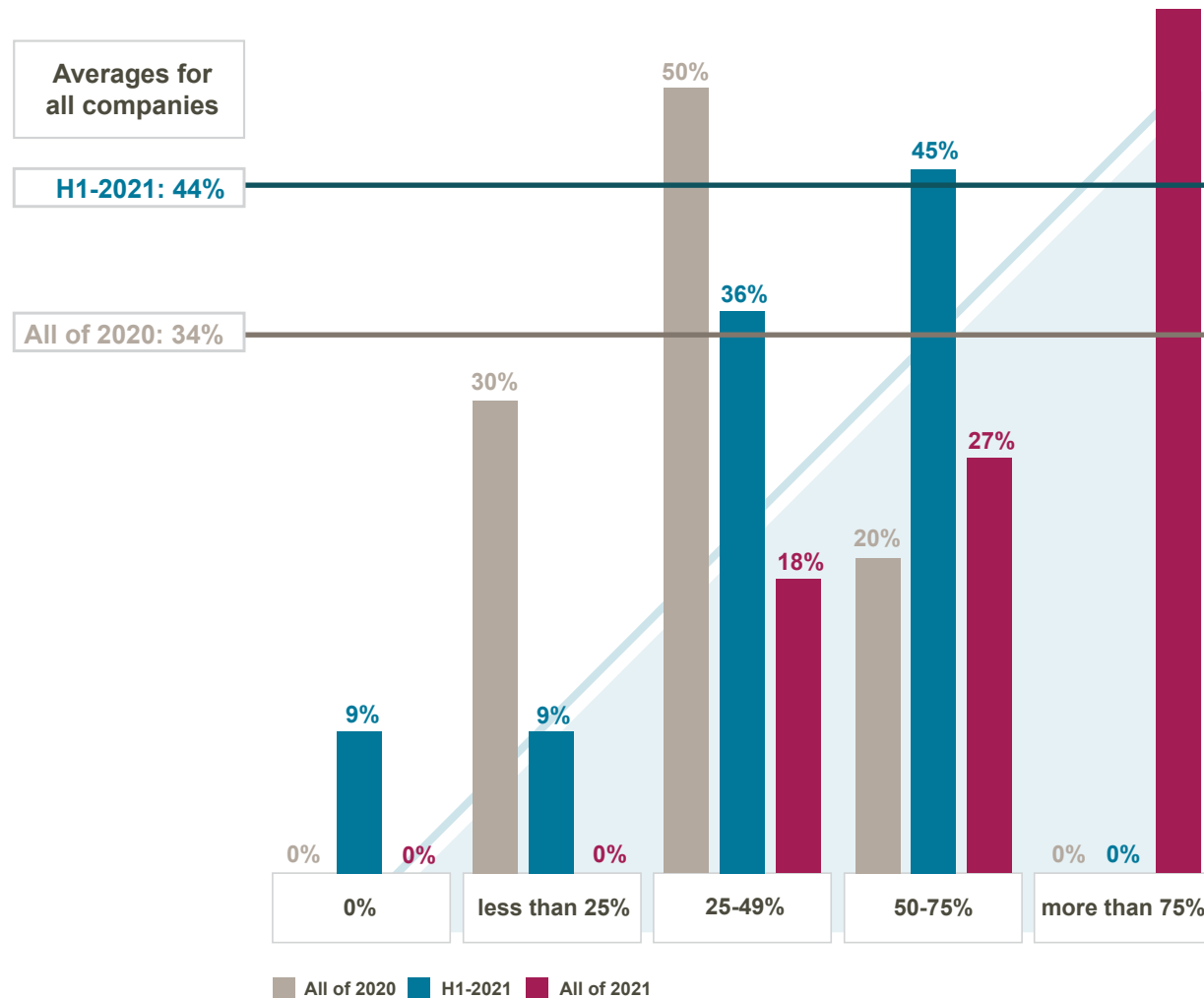


Detailed results for Thailand

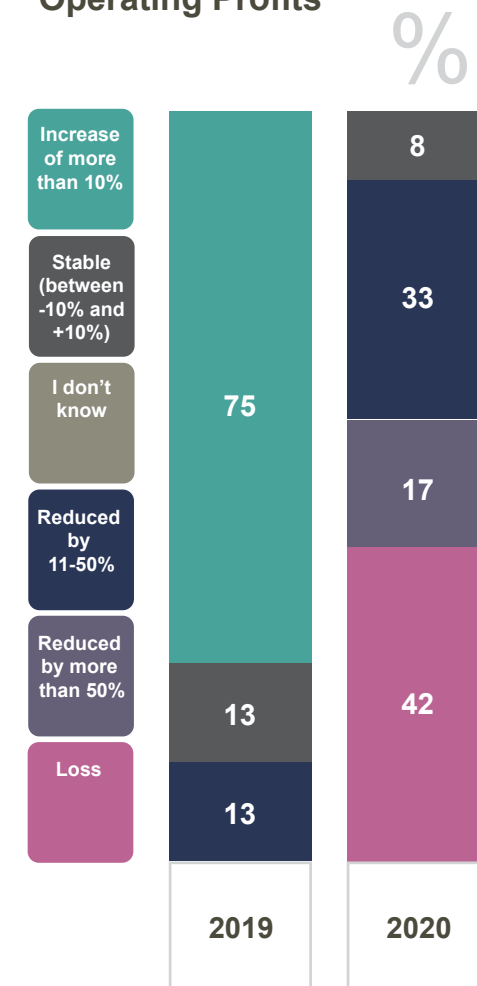


All of 2021: 77%

Revenue compared to 2019



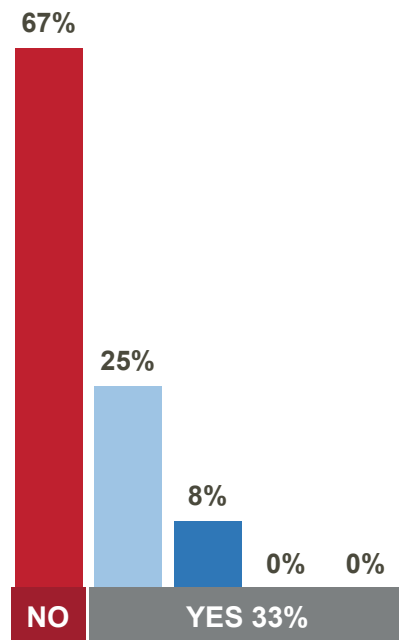
Operating Profits



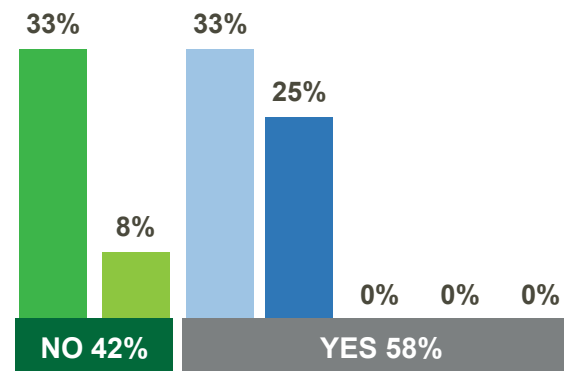
Detailed results for Thailand



Did your company benefit from public financial support?



Have you had to reduce your workforce?



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



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- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
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- Yes, for more than 50% of our 2019 overall costs

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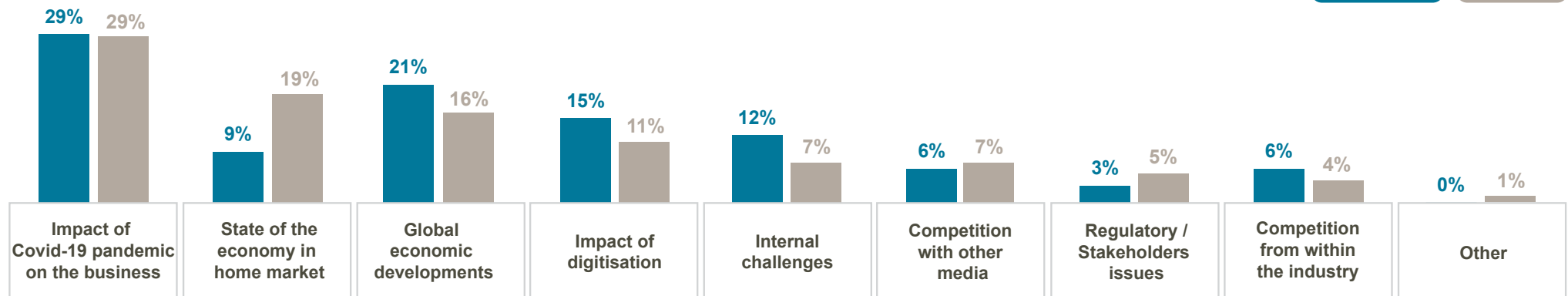
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Detailed results for Thailand



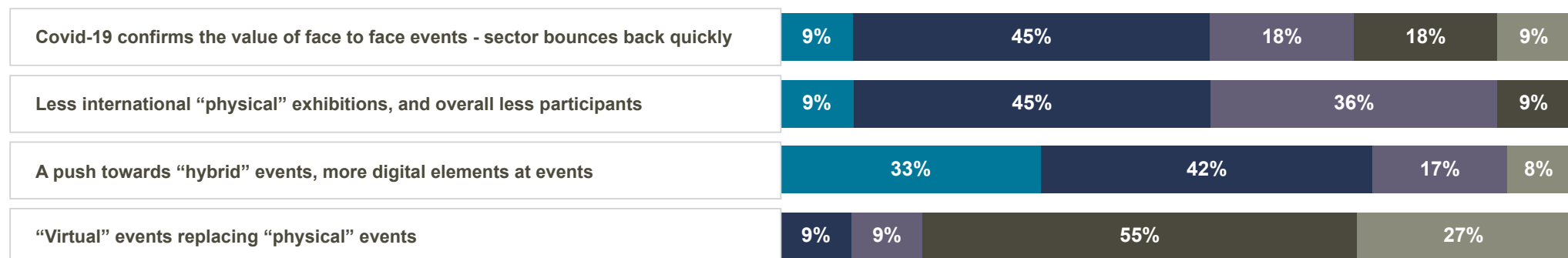
Most important business issues in the exhibition industry

Thailand Global



Format of exhibitions in the coming years

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



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008.

This 26th survey was concluded in December 2020 and includes data from 457 companies in 64 countries and regions. The report delivers outlooks and analysis for 24 countries and regions. In addition, it analyses five aggregated regional zones.

Results highlights the severe impact of the COVID-19 pandemic on the exhibition industry worldwide in 2020. It also shows some positive signs as to the expected rebound of activity for 2021.

Globally, between April and August 2020, more than half of companies had no activity. This situation changed as from September, where a majority of companies declared the return of some operations, reduced for most.

In all regions, a majority of companies expect both “local” and “national” exhibitions to open again by the end of June 2021 latest. But that is not expected until the second half of 2021 for international exhibitions, and **for 2021, the proportion of companies expecting a “normal” level of activity grows from 10% for January to 37% for June.**

When asked what element would most help towards the “bounce back” of exhibitions, a majority of companies, rank “Readiness of exhibiting companies and visitors to participate again” (64% of answers globally), “Lift of current travel restrictions” (63%) and “Lift of current public policies that apply locally to exhibitions” (52%) first.

On average globally, **revenues for 2020 represented only 28% of the revenues produced for same period last year, and looking at 2021, it is currently expected that the revenues will represent 34% of those of 2019 for the first half of 2021, and 58% for all of 2021. In terms of profits, 52% of companies faced a loss, and 30% a reduction of their profit by more than 50%.**

Overall:

- **44% of companies benefitted from some level of public financial support**, and for a majority of them it related to less than 10% of their 2019 overall costs.
- **54% of companies had to reduce their workforce**, half of them by more than 25%.
- **10% of companies state they will have to close down** if there is no business for the next 6 months.

As expected, “Impact of COVID-19 pandemic on the business” is considered as the most important business issue (29% of combined answers, a 2% increase compared to 6 months ago). “Impact of digitalisation” (11% of answers) and “Competition with other media” (7%) are also increasing (by respectively +1% and +2%), while “State of the economy in home market” (19%) and “Global economic developments” (16%) decrease but remain among the top 3 concerns.

In terms of the evolution of the format of exhibitions in the coming years, global results indicate that:

- **64% - compared to 57% 6 months ago - are confident that “COVID-19 confirms the value of face- to-face events”** anticipating that the sector will bounce back quickly (26% “Yes, for sure” and 38% “Most probably”), but 32% are “Not sure” (31% 6 months ago).
- **63% - compared to 57% 6 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants”** (10% “Yes, for sure” and 53% “Most probably”), and 34% are “Not sure”.
- **80% of companies – close to the 82% from 6 months ago - consider that there is “A push towards hybrid events, more digital elements at events”** (32% “Yes, for sure” and 48% “Most probably”).
- **A minority of 14% - close to the 17% from 6 months ago - agrees with “Virtual events replacing physical events”** (3% “Yes, for sure” and 11% “Most probably”), and 44% are “Not sure”.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!

THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2021 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 457 (in 64 countries/regions)

North America	41	Europe	123	Middle East	21
Canada	3	Austria	1	Bahrain	1
Mexico	21	Azerbaijan	1	Jordan	1
USA	17	Belgium	1	Lebanon	1
		Croatia	1	Oman	2
		Czech Republic	1	Qatar	1
Central & South America	91	Finland	1	Saudi Arabia	3
Argentina	22	France	13	United Arab Emirates	12
Bolivia	4	Georgia	1		
Brazil	14	Germany	16	Asia/Pacific	162
Chile	3	Greece	3	Australia	18
Colombia	20	Hungary	2	China	24
Costa Rica	1	Ireland	1	Hong Kong	11
Cuba	1	Italy	12	India	23
Ecuador	3	Netherlands	3	Indonesia	9
Guatemala	2	Poland	4	Japan	16
Panama	3	Portugal	3	Malaysia	17
Paraguay	1	Romania	1	Pakistan	4
Peru	15	Russian Federation	12	Philippines	2
Uruguay	2	Slovenia	1	Singapore	12
		Spain	13	South Korea	14
Africa	19	Sweden	3	Thailand	12
Kenya	1	Switzerland	1		
Nigeria	1	Turkey	13		
Rwanda	2	Ukraine	1		
South Africa	15	United Kingdom	14		

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