

# UFI Global Exhibition Barometer

**27<sup>th</sup> Edition**

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



Global



Japan



Southern Africa



Macau



United Kingdom



Malaysia



Spain



Russian Federation



Peru



Singapore



Central & South America



US



South Korea



Thailand



Mexico



Brazil



Indonesia



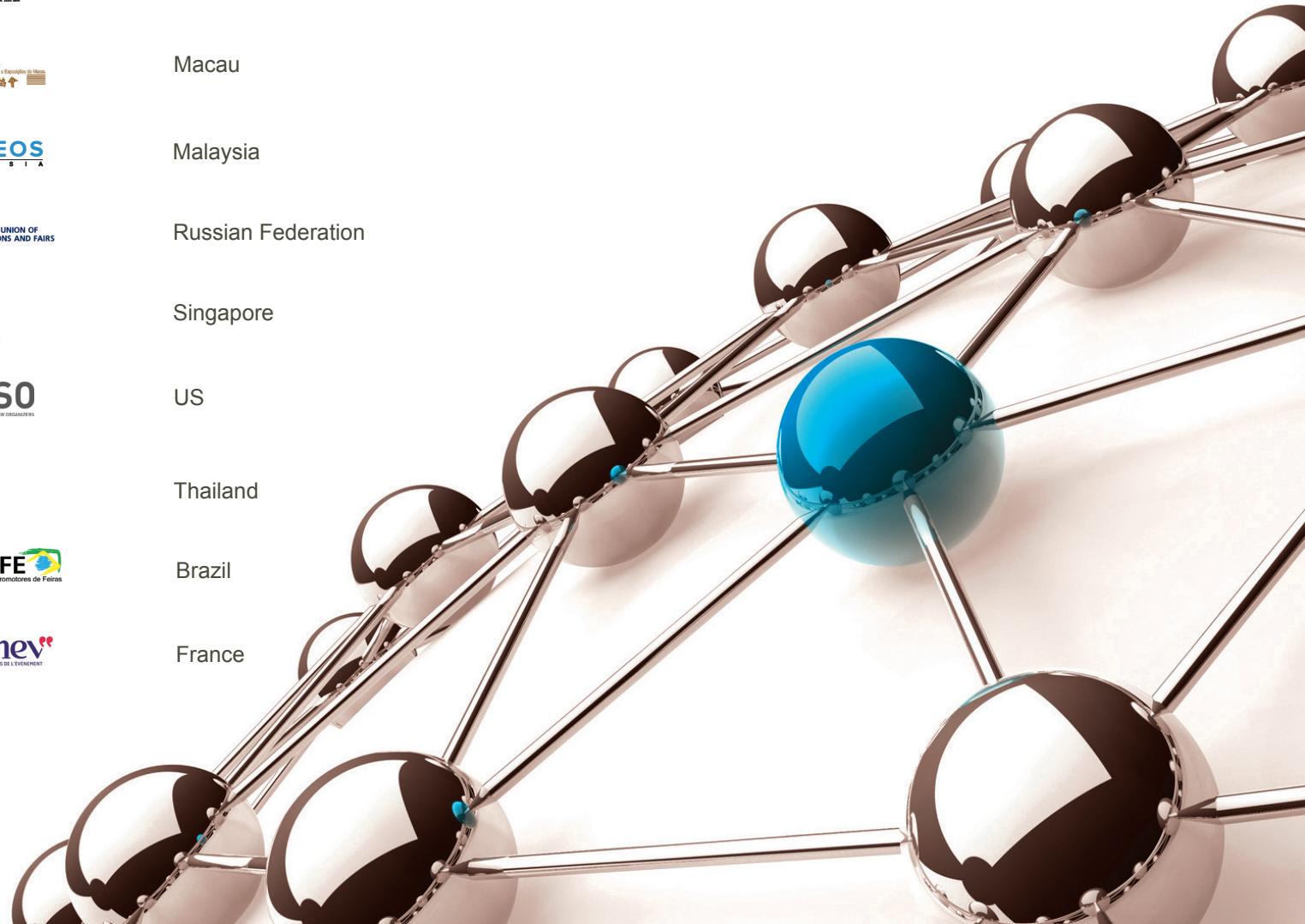
France



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.

## UFI Research Patron: Freeman<sup>1</sup>

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



UFI Research is available at  
[www.ufi.org/research](http://www.ufi.org/research)

Introduction	04
<hr/>	
Results globally	
Operations – Reopening Exhibitions	05
Turnover – Operating profits	08
Public Financial Support – Workforce – Perspectives	10
Most Important Business Issues	12
Digitisation	15
Format of Exhibitions in the Coming Years	18
Physical, hybrid and digital events	20
<hr/>	
Regional and details results for selected markets	
North America – Mexico and US	23
Central & South America – Brazil, Chile and Colombia	51
Europe – France, Germany, Italy, Russian Federation, Spain, Turkey and UK	86
Middle East & Africa – South Africa et UAE	149
Asia & Pacific – Australia, China, Hong Kong, India, Japan, Malaysia, Singapore, South Korea and Thailand	177
<hr/>	
Conclusion	254
<hr/>	
Answers per country/region	256

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

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

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

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

## Important remarks

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

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at [research@ufi.org](mailto:research@ufi.org)

This research is available online at [www.ufi.org/research](http://www.ufi.org/research)

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

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

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

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

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

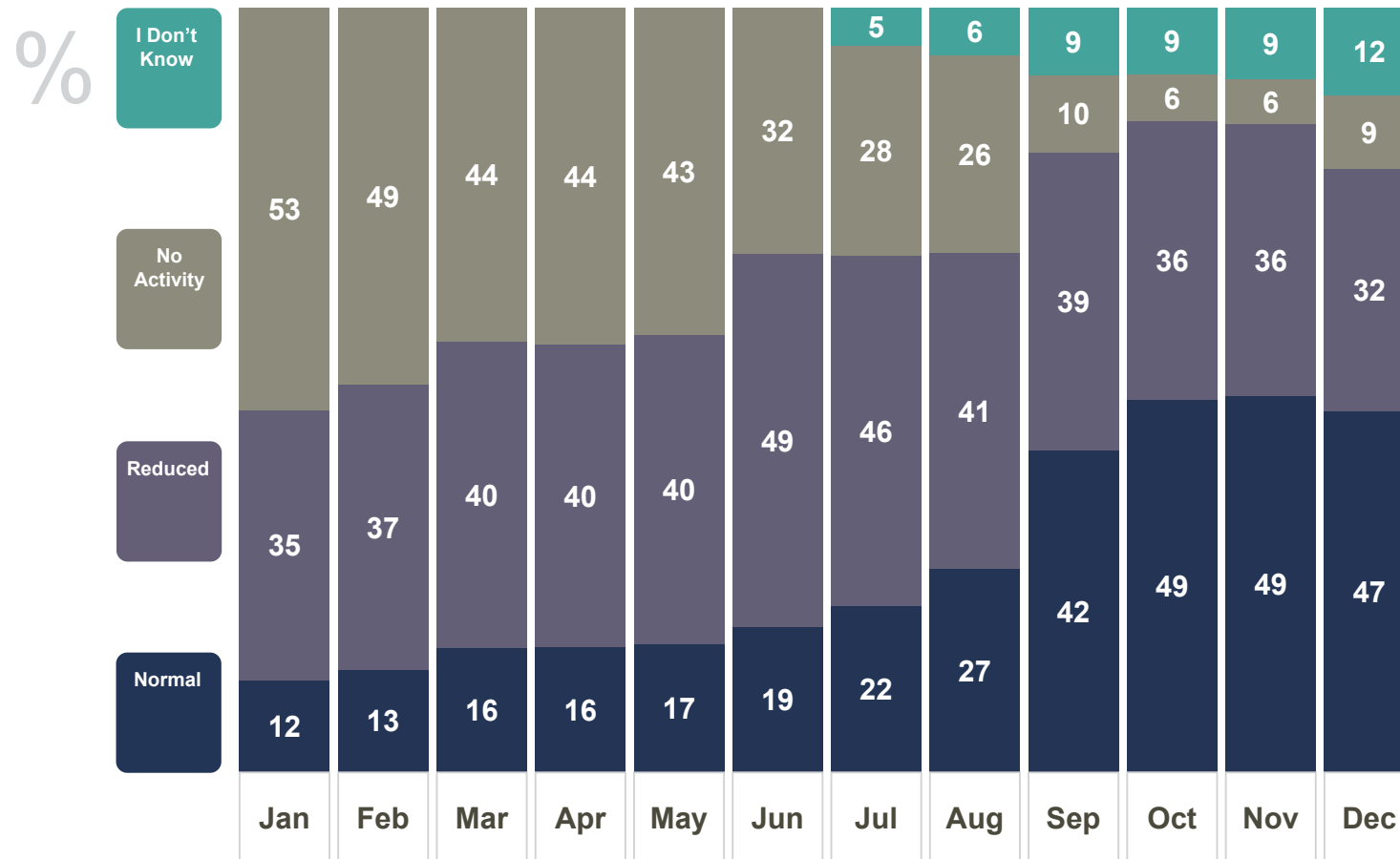
Asia & Pacific) and 22% and 20% of "normal activity" (27% in Asia & Pacific, 30% in Europe and 35% in North America).

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

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

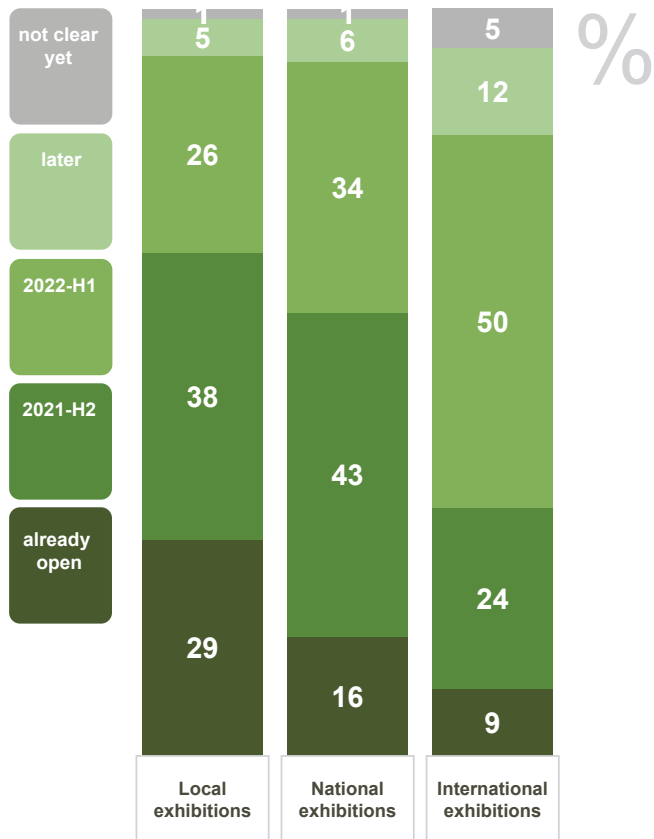


## Reported levels of exhibition industry operations throughout 2021

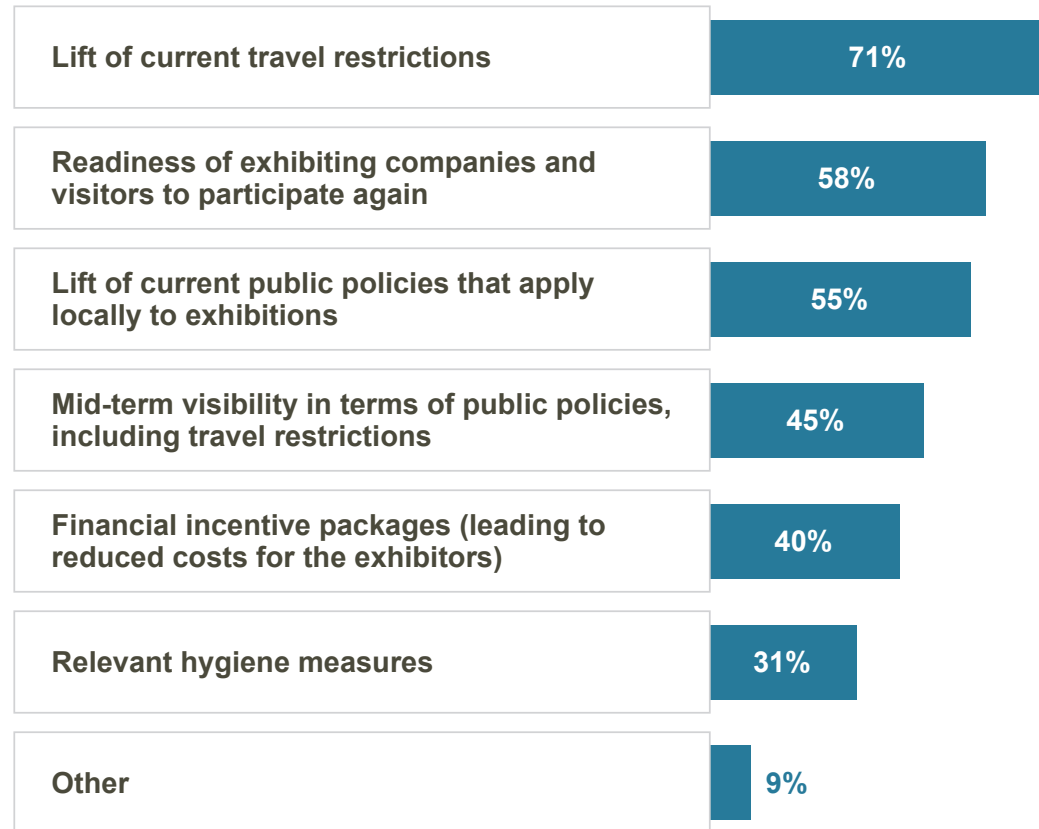




## When do you believe exhibitions will open again in your city?



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



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

## The following charts present:

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

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

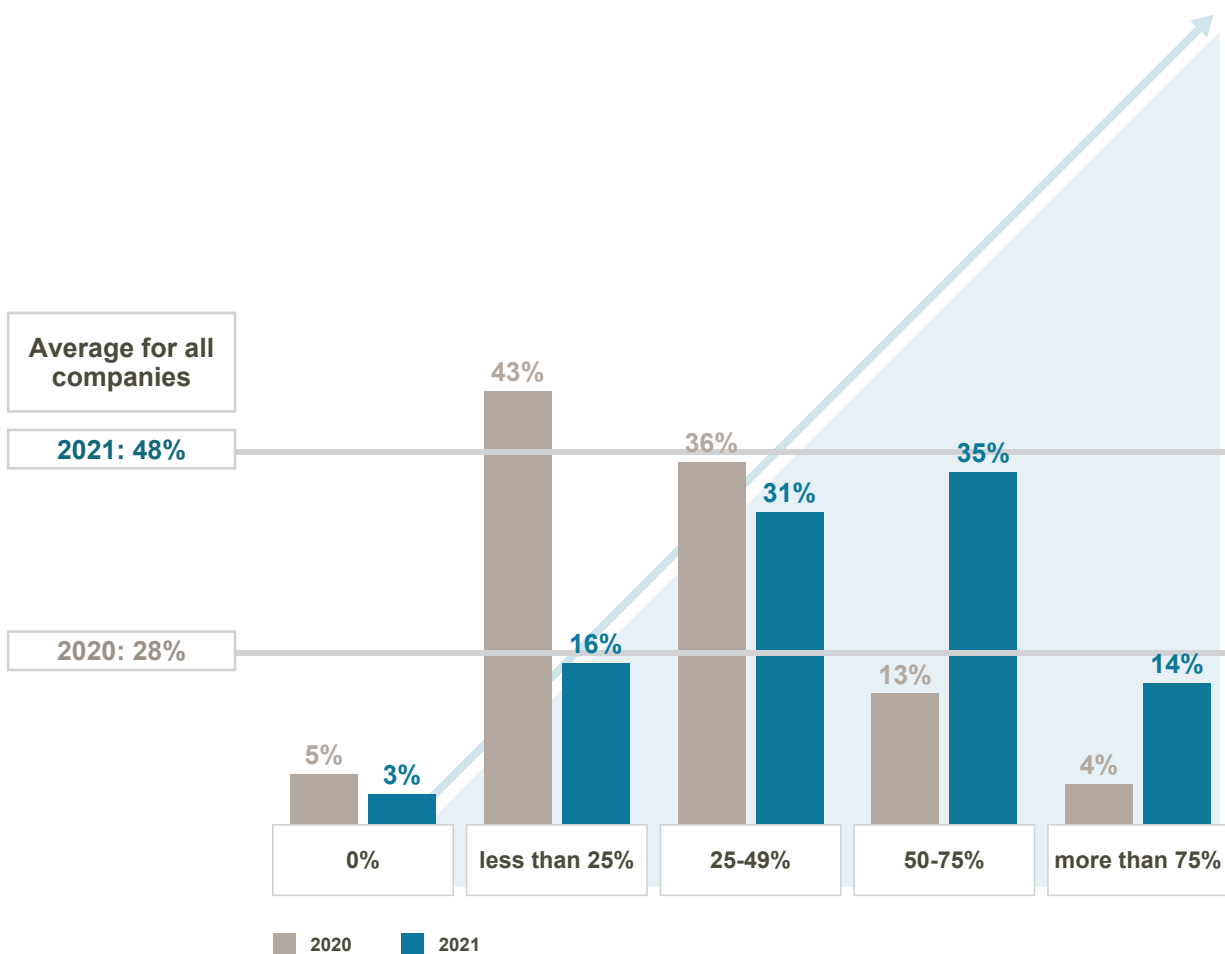
## Regional results indicate that:

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

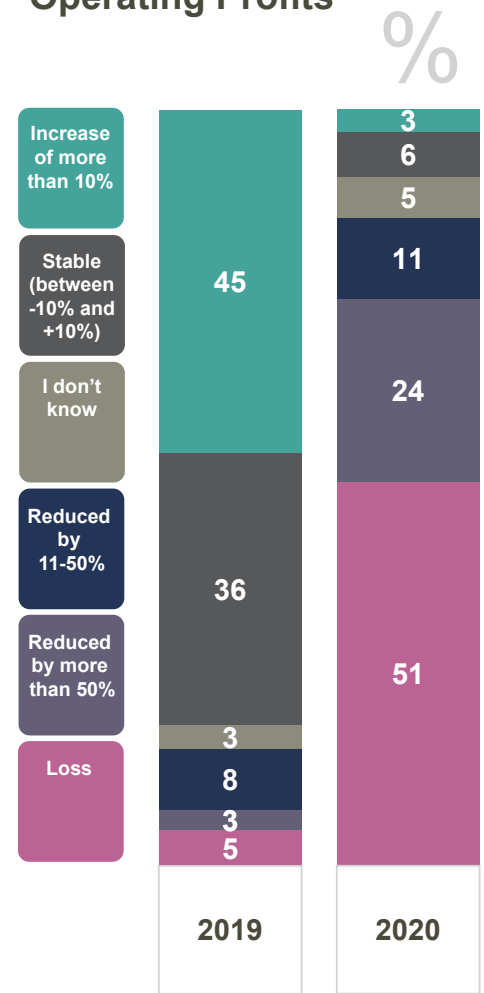




## Revenue compared to 2019



## Operating Profits



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

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

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

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

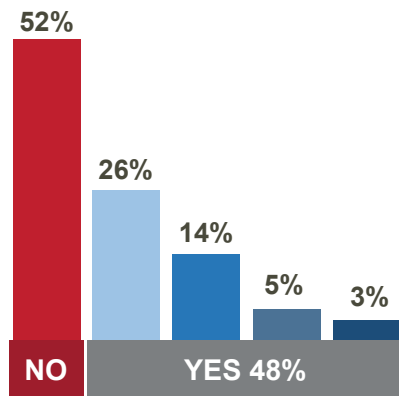
There was a higher reduction in workforce amongst companies in Central & South America (79%), the Middle East & Africa (73%) and North America (63%) than in Asia & Pacific (52%) and Europe (43%).

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

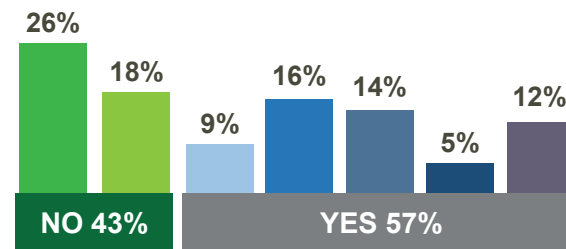
For 57% globally, “it will be hard, but we can keep our heads above water”, while 34% of companies consider they will manage (this proportion varies from 23% in Central & South America to 41% in the Middle East & Africa).



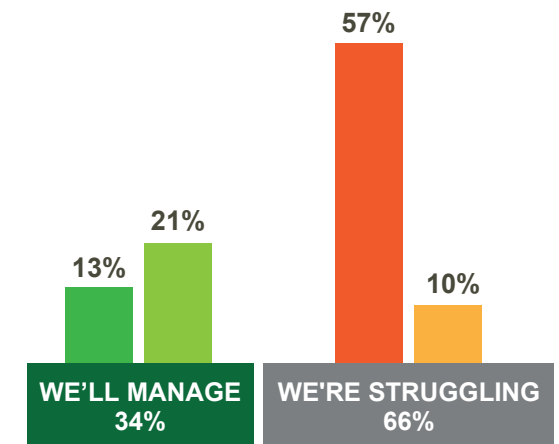
## Did your company benefit from public financial support?



## 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

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

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

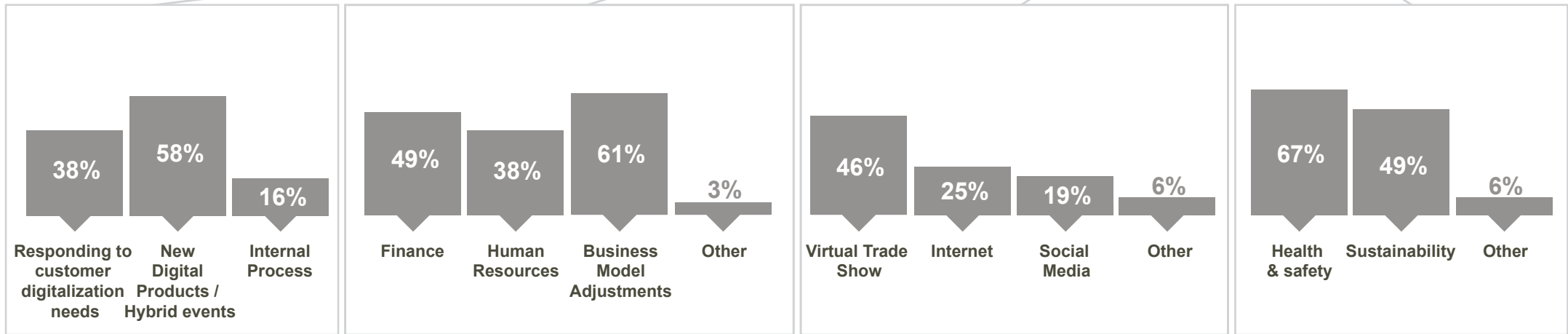
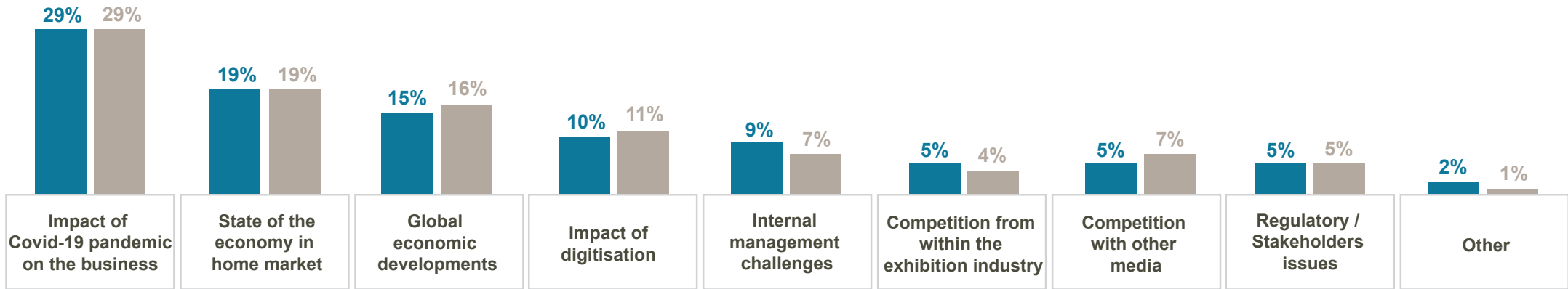
The following pages show the consolidated results, for the world and by region. “impact of COVID-19 pandemic on the business” ranks higher in the Middle East & Africa (34%), “state of the economy in home market” ranks higher in Central & South America (26%), and “global economic developments” ranks higher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

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

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

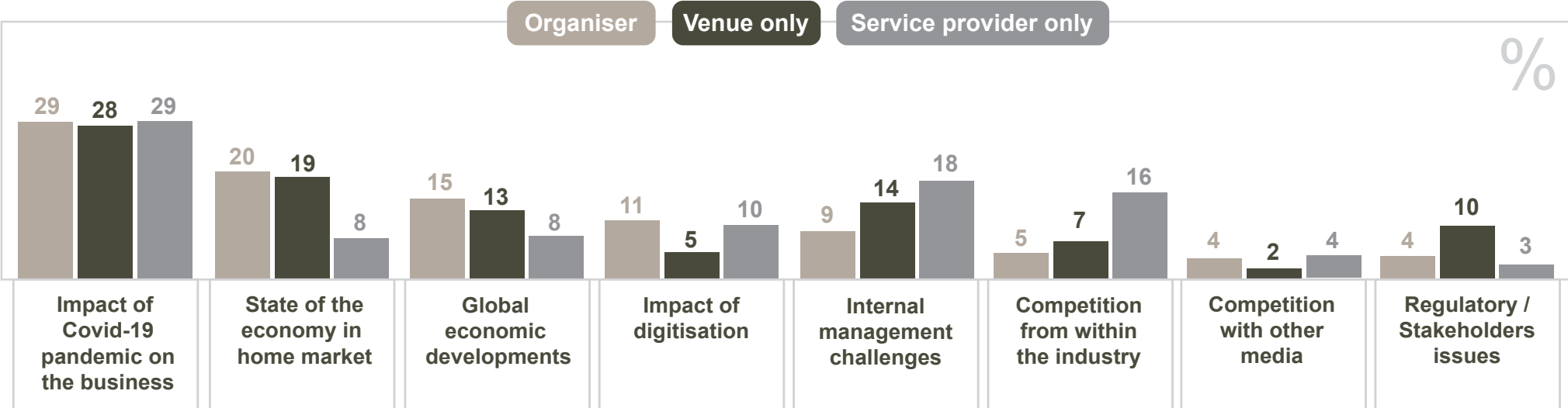
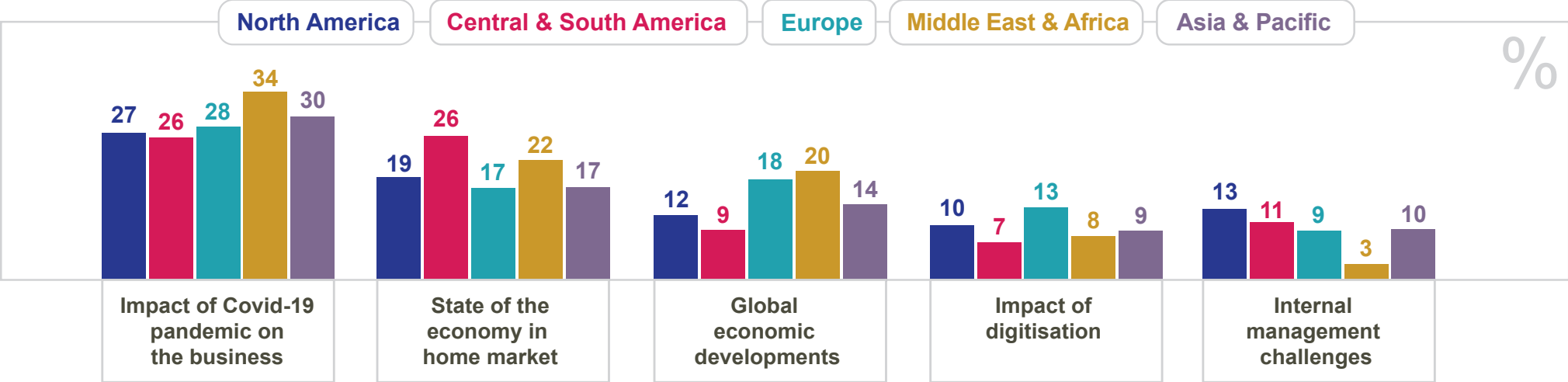
## Results from current survey - June 2021

## Results from previous survey - Dec 2020



(multiple answers possible)

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



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

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

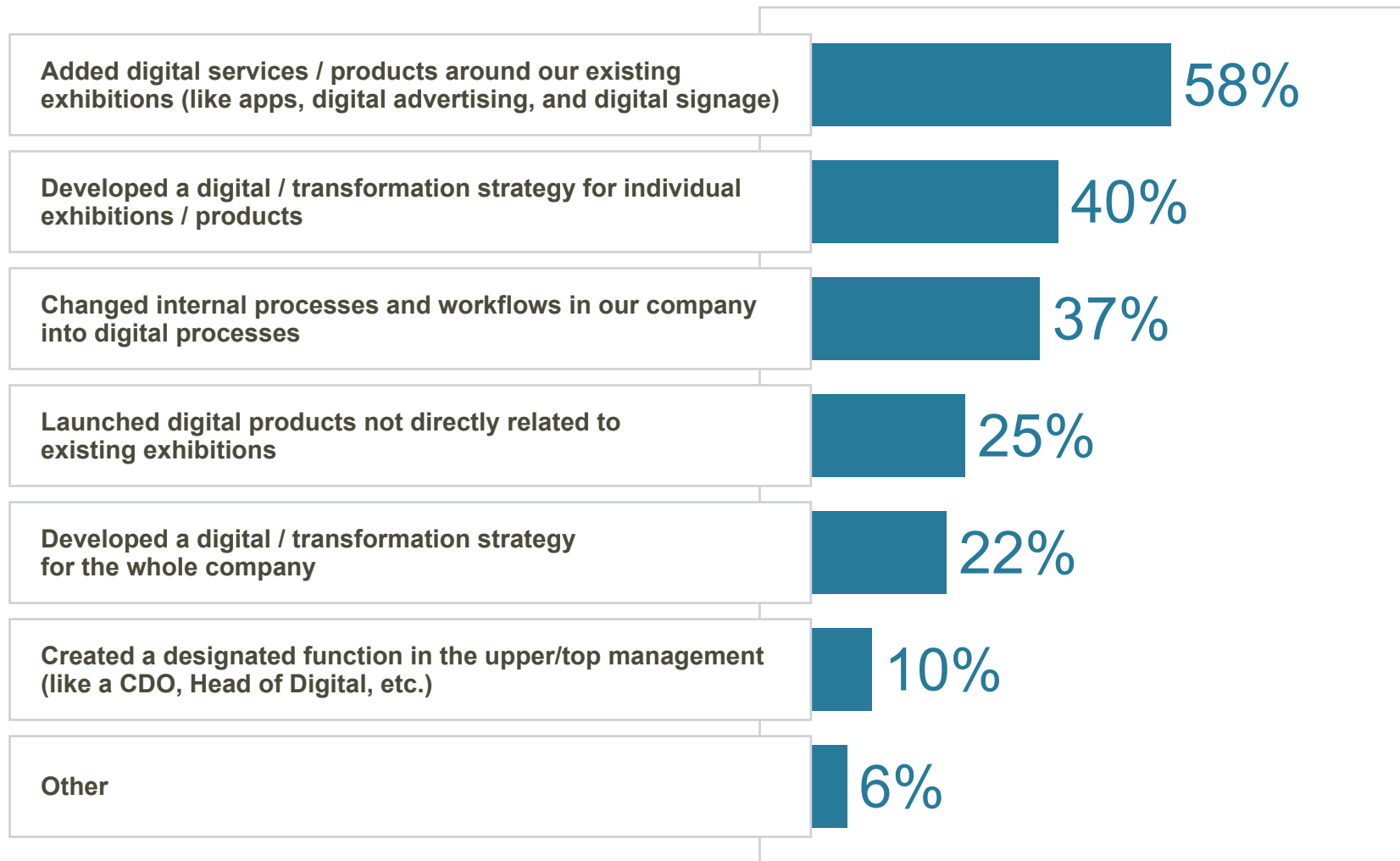
In addition, while 40% of respondents globally indicated that they have developed a digital transformation strategy for individual exhibitions and products, this number was higher in North America, at 57%.

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

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

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

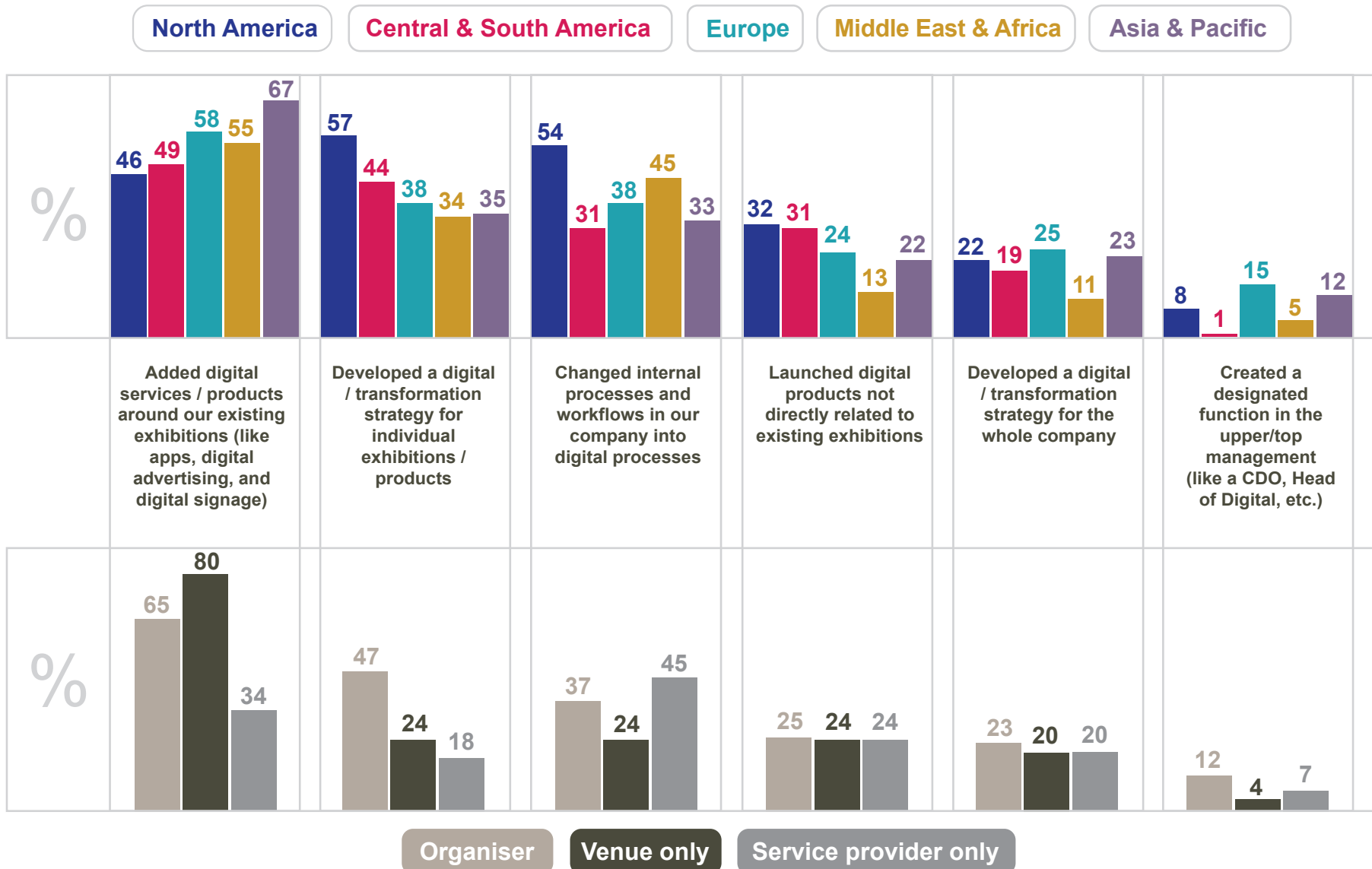
## Actions put in place







## Actions put in place



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

The results show no significant differences across regions.

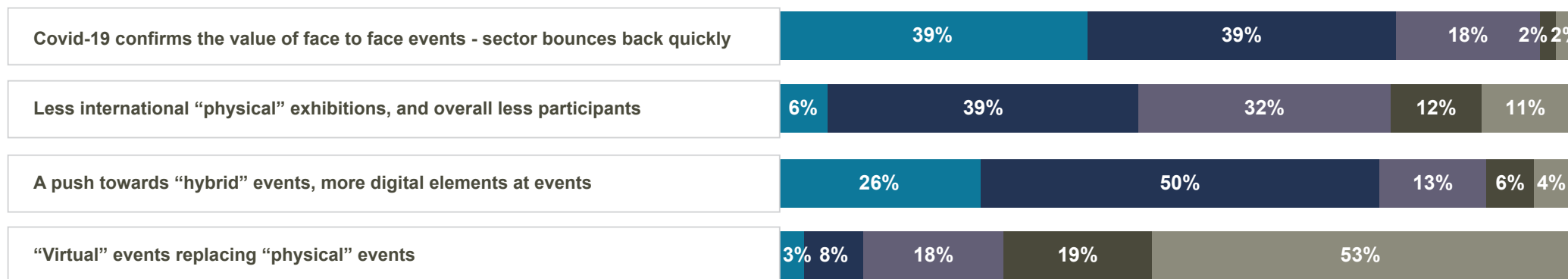
## Global results indicate that:

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



## Format of exhibitions in the coming years

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



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

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

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

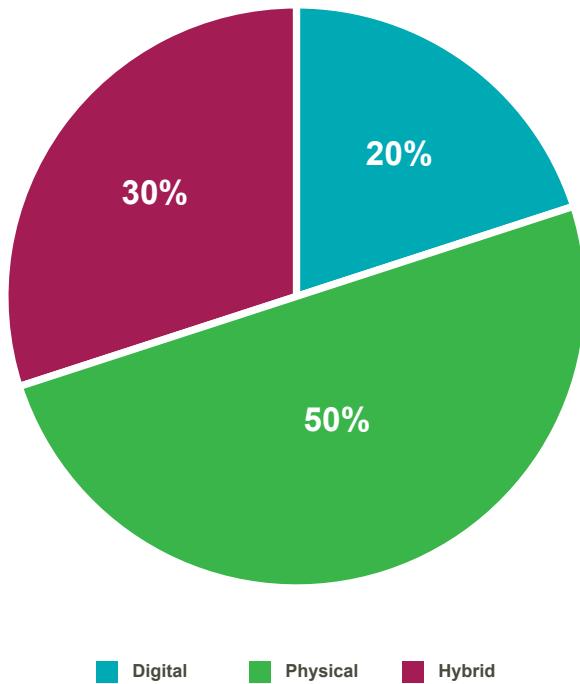
There are no strong regional differences, although digital events have a stronger relevance in Central & South America, where 31% of events organised in 2021 will be digital, and 53% of companies believe that digital events will represent more than 10% of their income for the next two years.

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

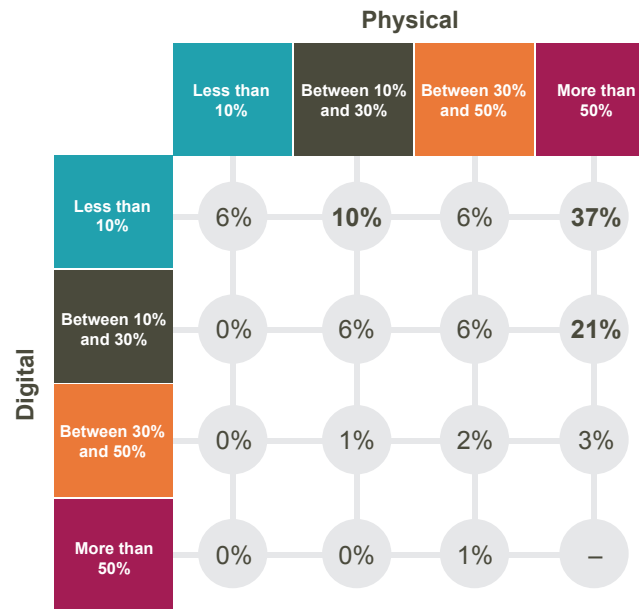
- 56% went for streaming of digital events, as broadcast studio
- 49% ran vaccination centres
- 35% held sports and / entertainment events stage
- 26% proposed their site to generate brand activations
- And 20% were used as temporary hospitals.



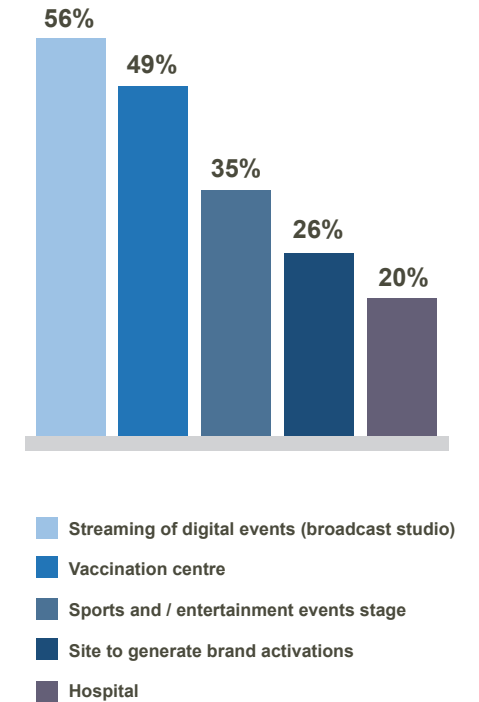
## Number of fairs projected in 2021



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



## Expanded activities (for venues only)



# Part 2: Detailed results for 5 regions and 23 markets

## North America:

Mexico  
US

---

## Central & South America:

Brazil  
Chile  
Colombia

---

## Europe:

France  
Germany  
Italy  
Russian Federation  
Spain  
Turkey  
United Kingdom

---

## Middle East & Africa:

UAE  
South Africa

---

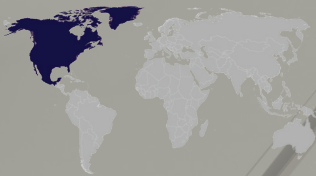
## Asia & Pacific:

Australia  
China  
Hong Kong  
India  
Japan  
Malaysia  
Singapore  
South Korea  
Thailand

A network diagram consisting of several circular nodes connected by thin lines, set against a solid red background. The nodes are arranged in a roughly diagonal line from the top-left towards the bottom-right, with some branching connections. The nodes have a metallic, reflective appearance with highlights and shadows. The text 'North America' is positioned in the upper right quadrant of the image.

North America

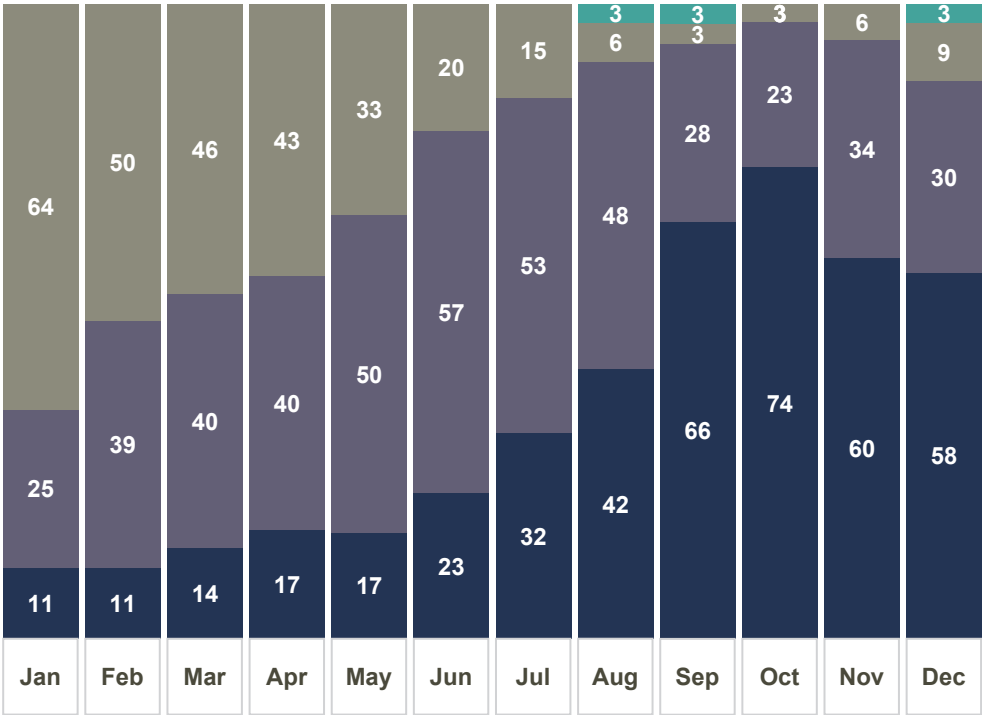
# Operations - Reopening Exhibitions North America



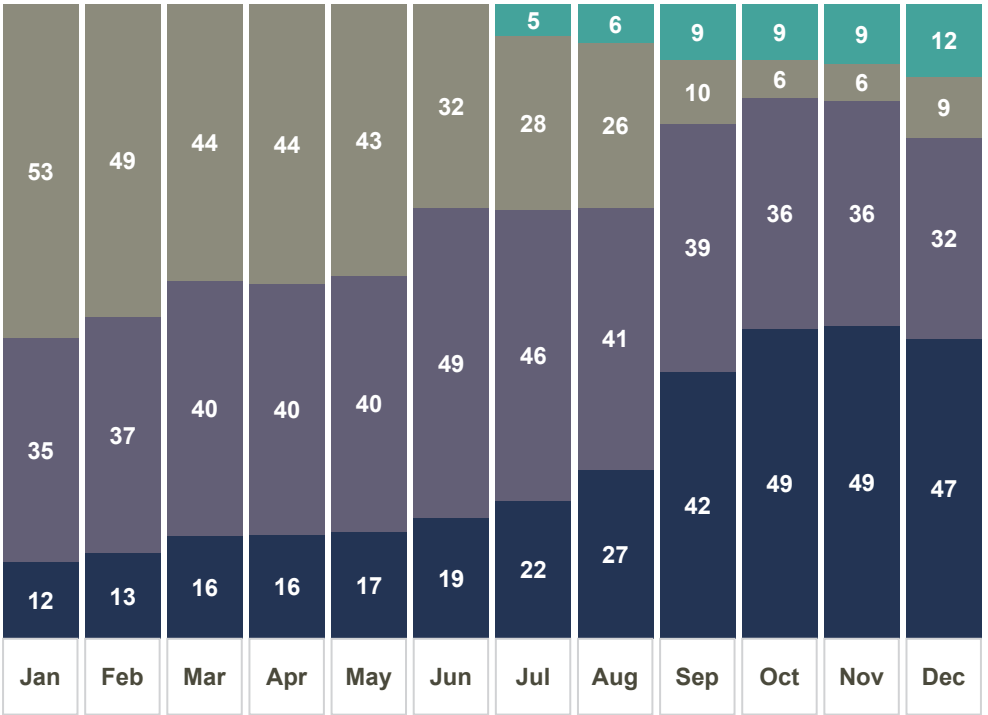
## Situation of industry operations in 2021



### North America

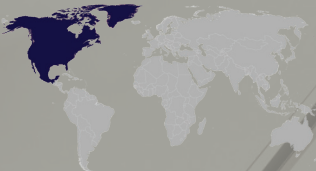


### World

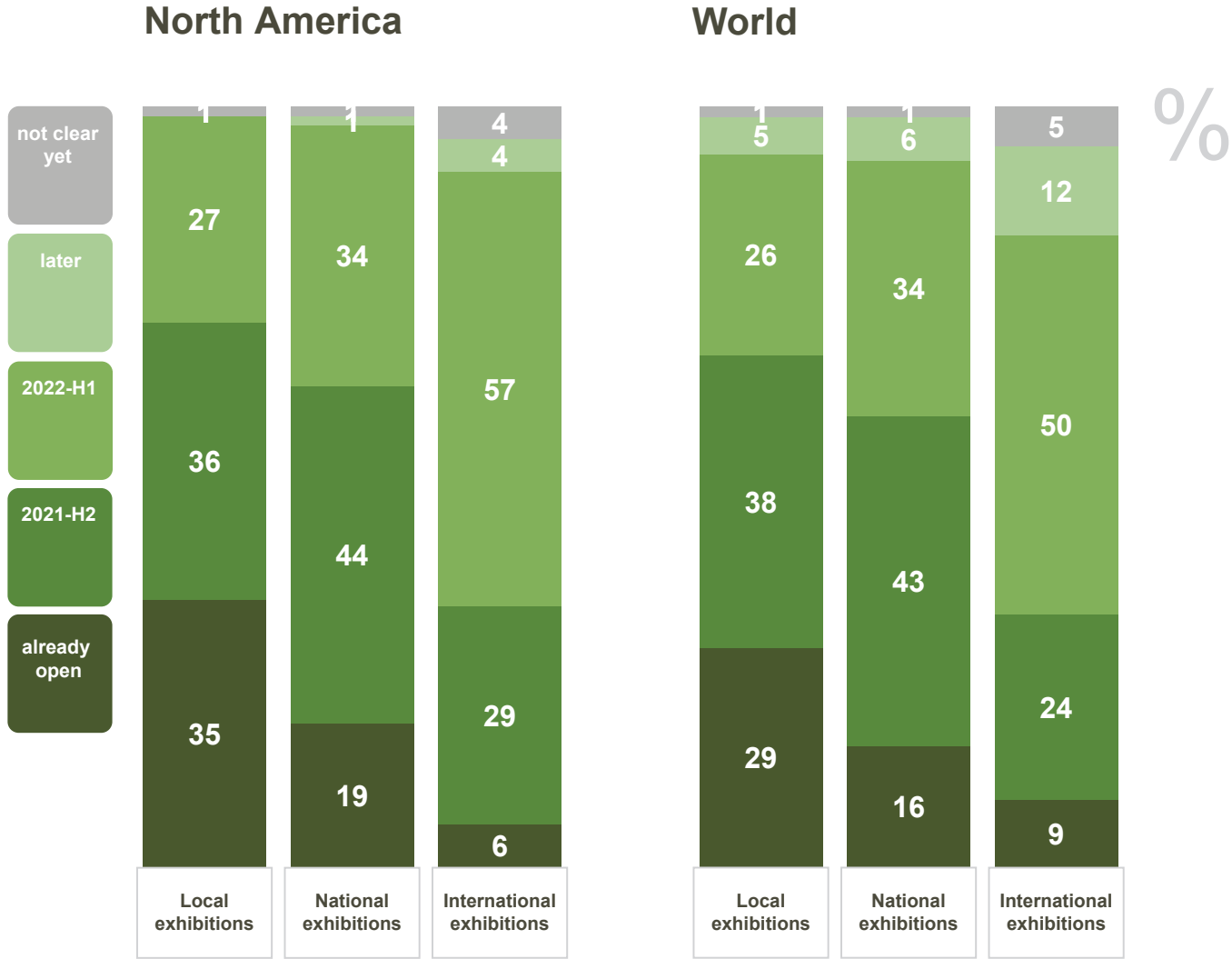


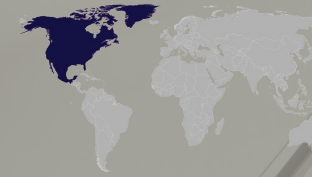


# Operations - Reopening Exhibitions North America



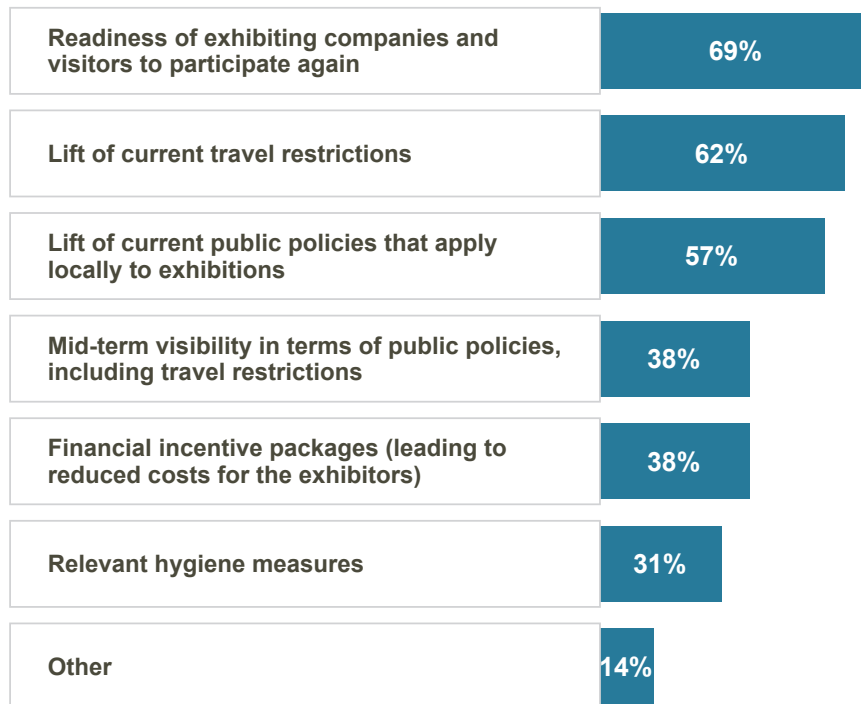
When do you believe exhibitions will open again in your city?



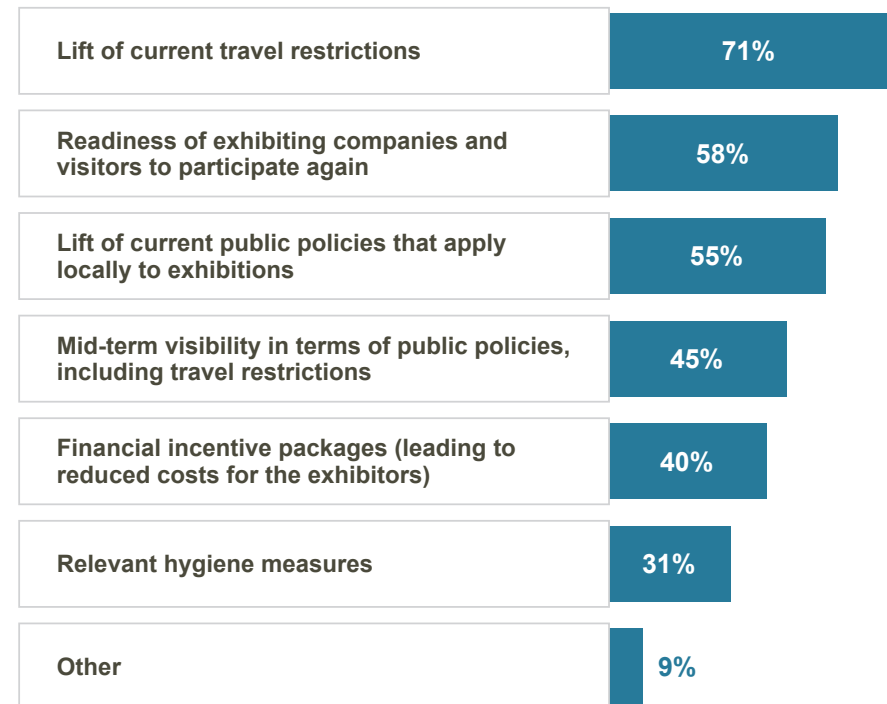


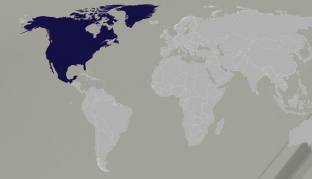
## What do you believe would most help the “bounce back” of exhibitions?

### North America

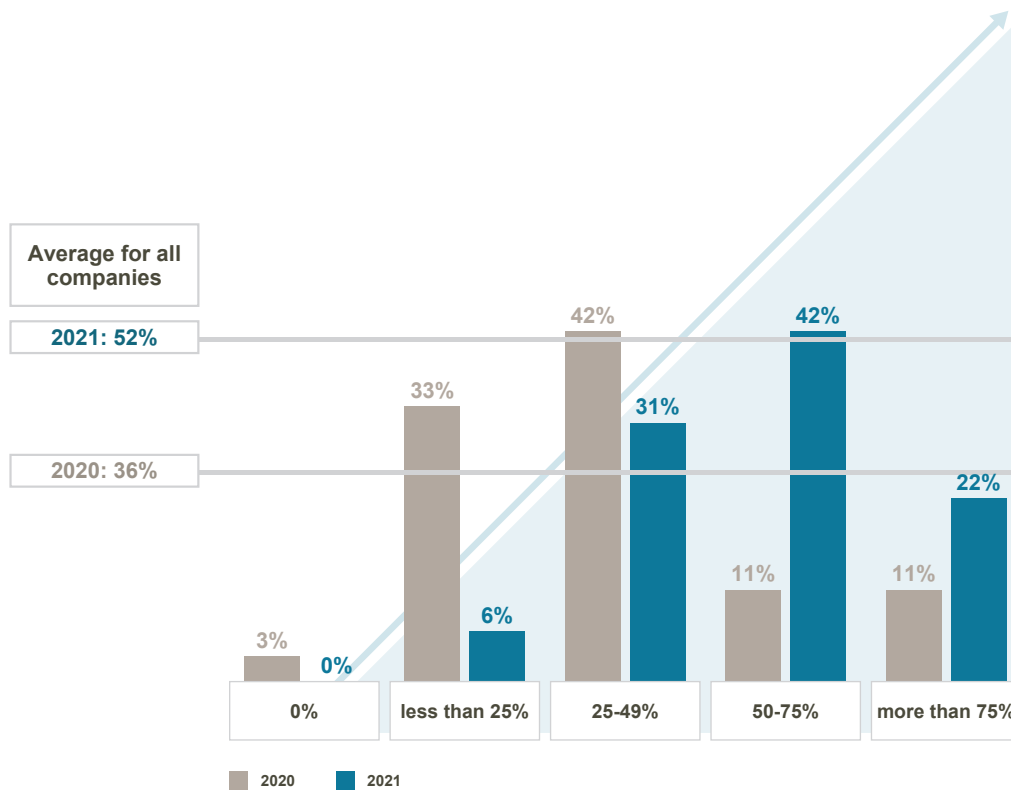


### World

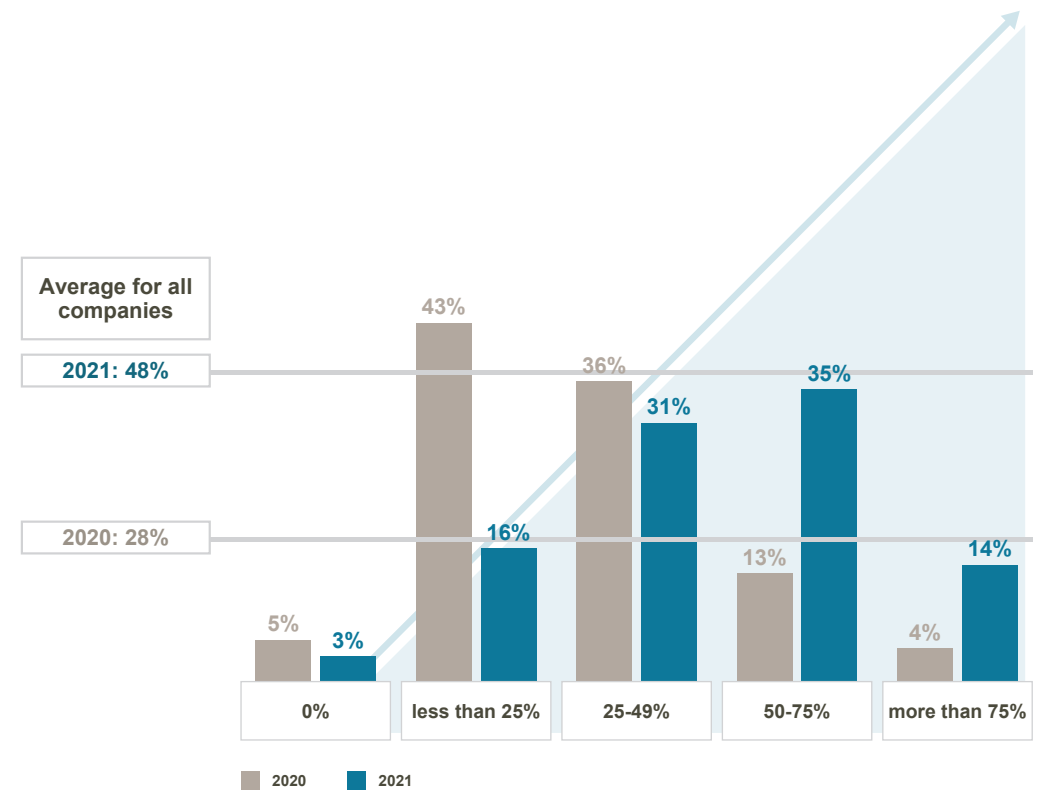




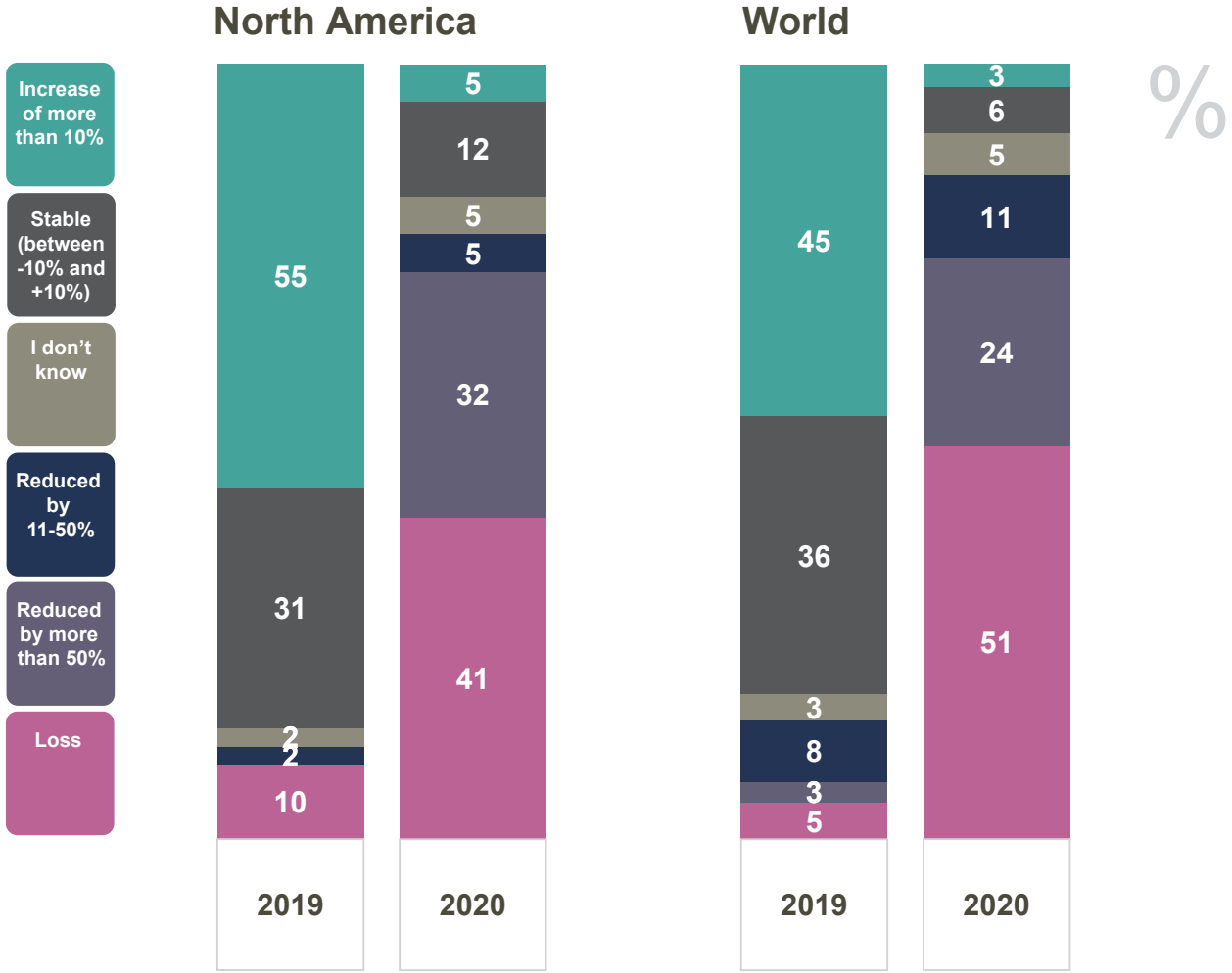
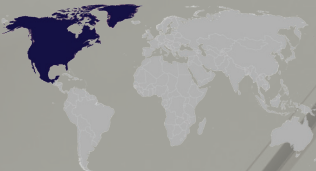
## Revenue compared to 2019 North America

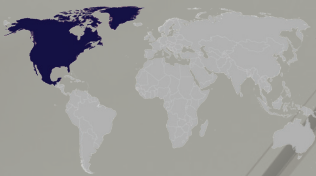


## World



# Operating Profits North America

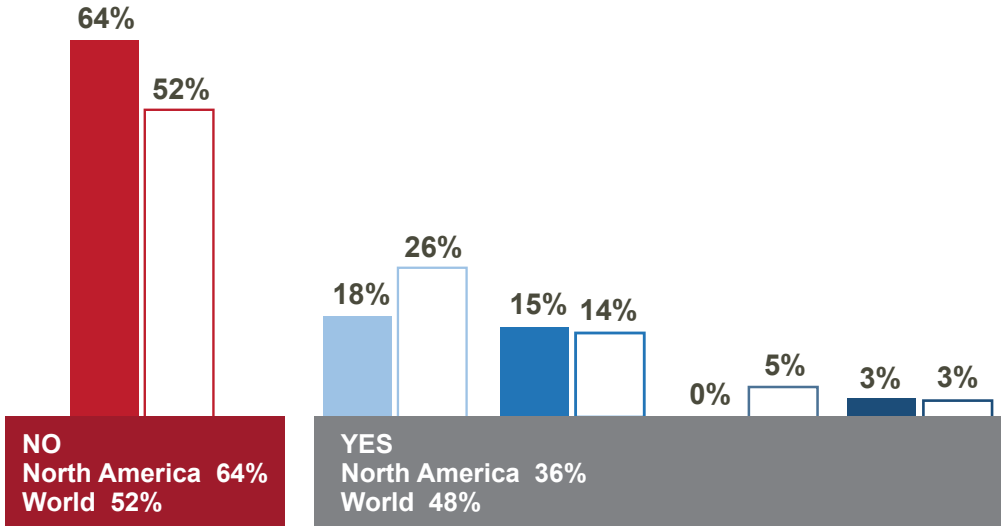


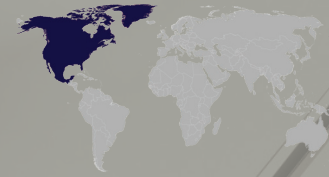


## Did your company benefit from public financial support?

**North America** World

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

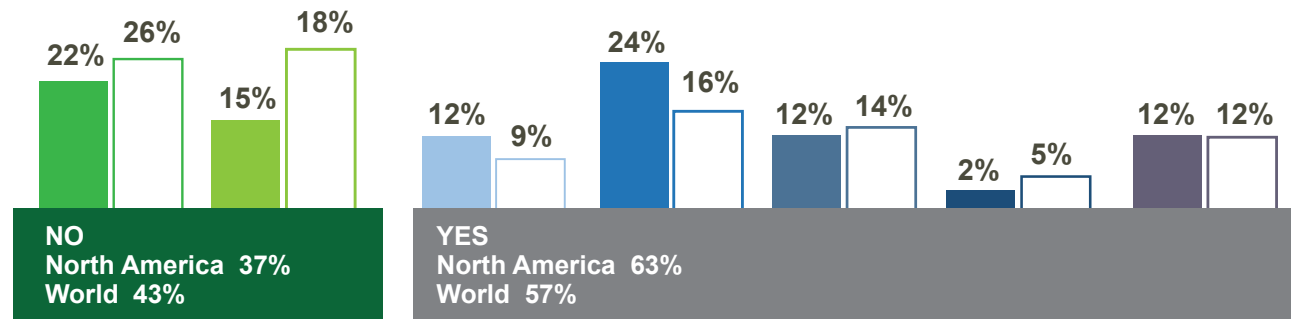


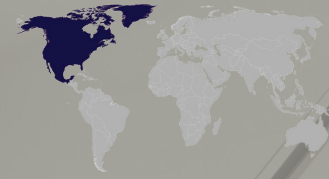


## Have you had to reduce your workforce?

**North America** World

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

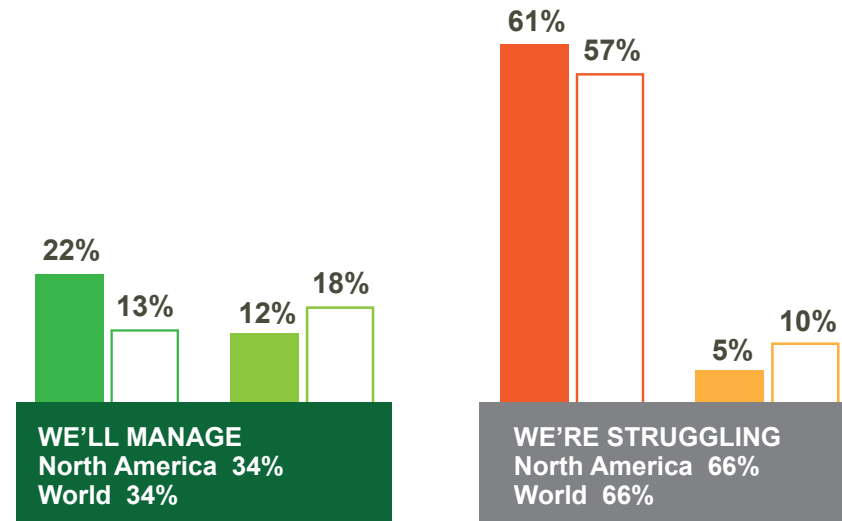




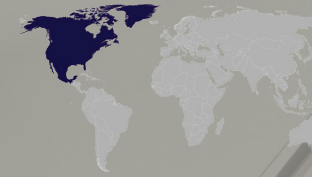
## If there is no business for the next 6 months, which best applies?

**North America** World

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

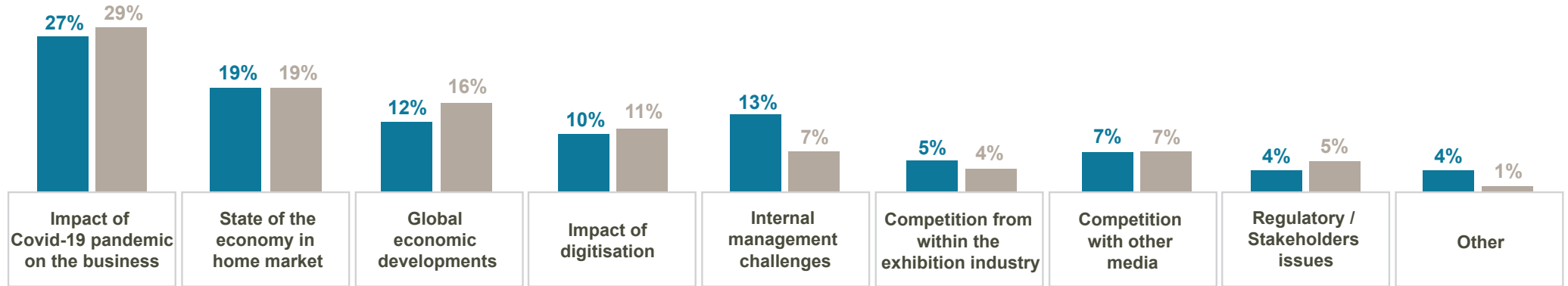


# Most Important Business Issues - Format of Exhibitions - North America



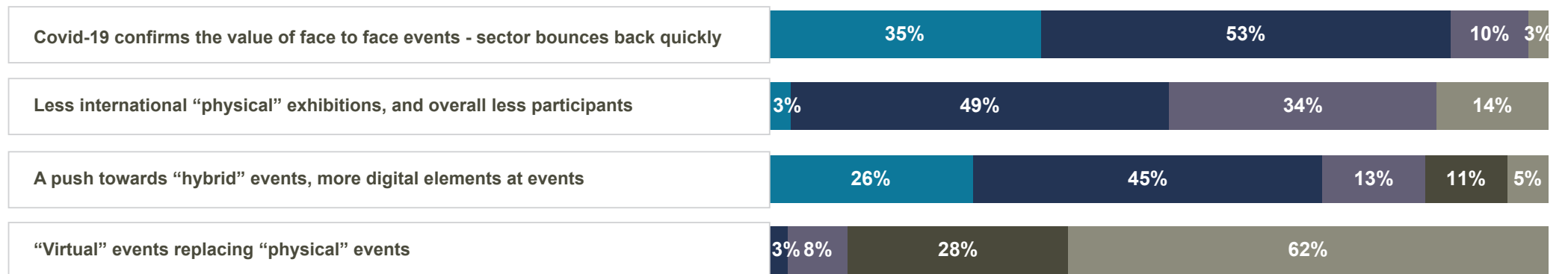
## Most important business issues in the exhibition industry

North America Global



## Format of exhibitions in the coming years

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

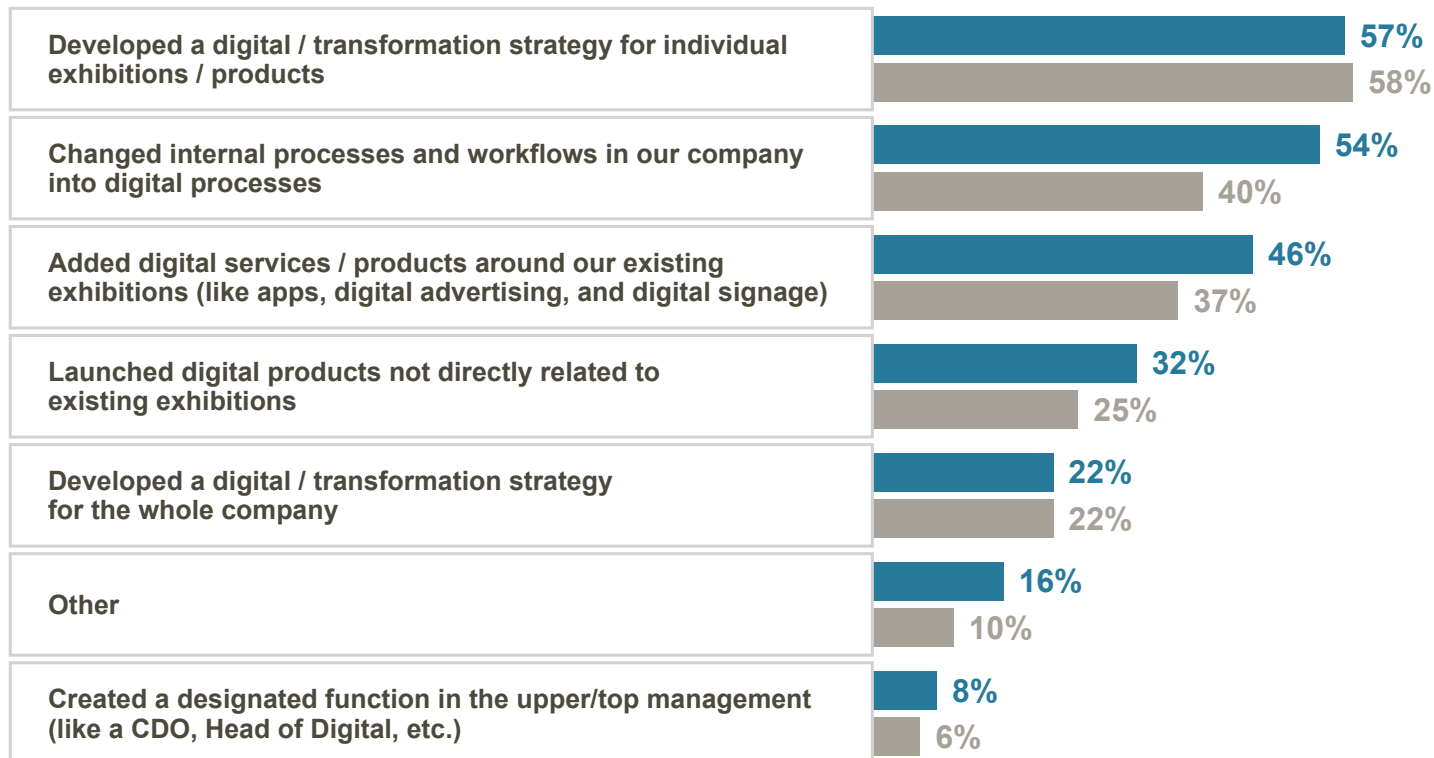




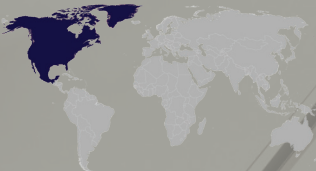
North America

Global

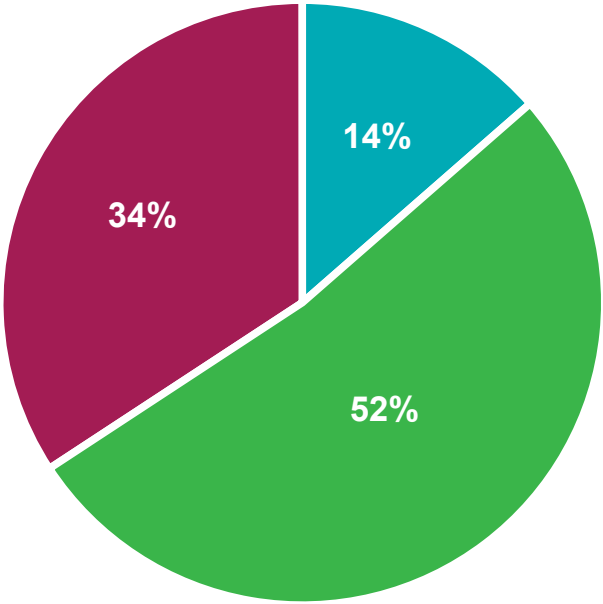
## Digitisation: implementation in North America and globally



# Number of fairs projected in 2021 North America

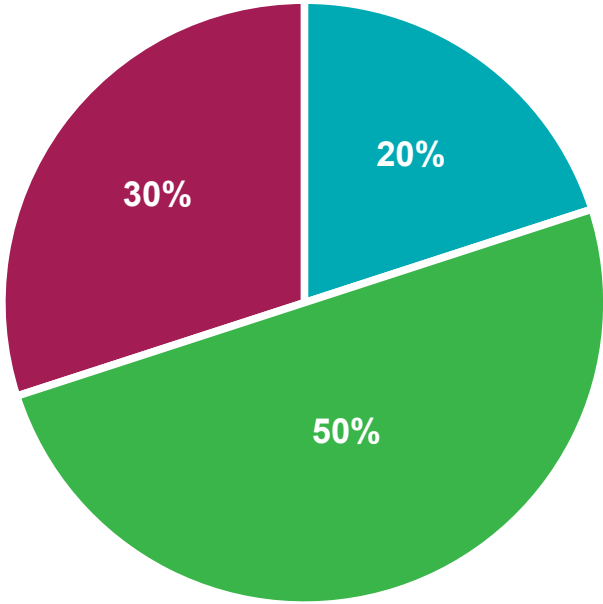


North America



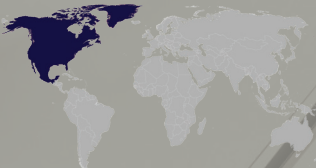
Digital Physical Hybrid

World

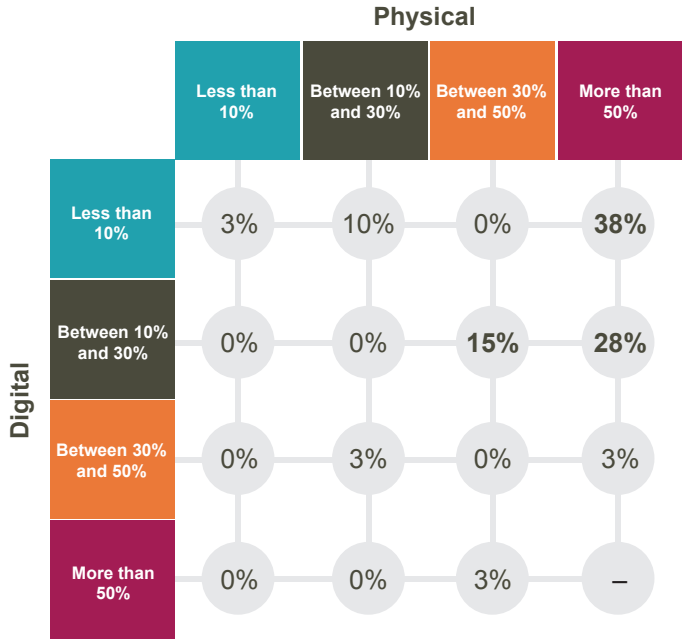


Digital Physical Hybrid

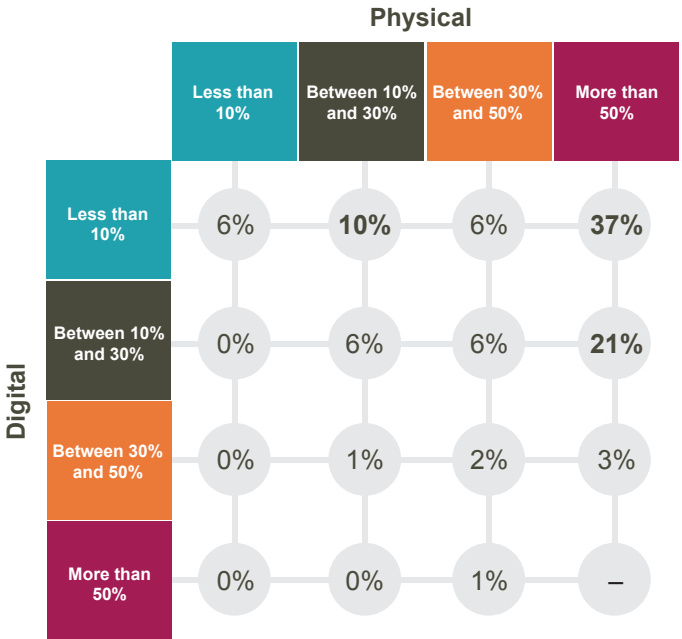
# Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



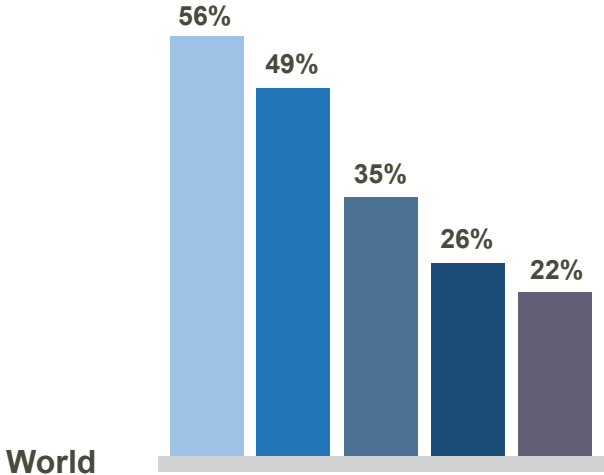
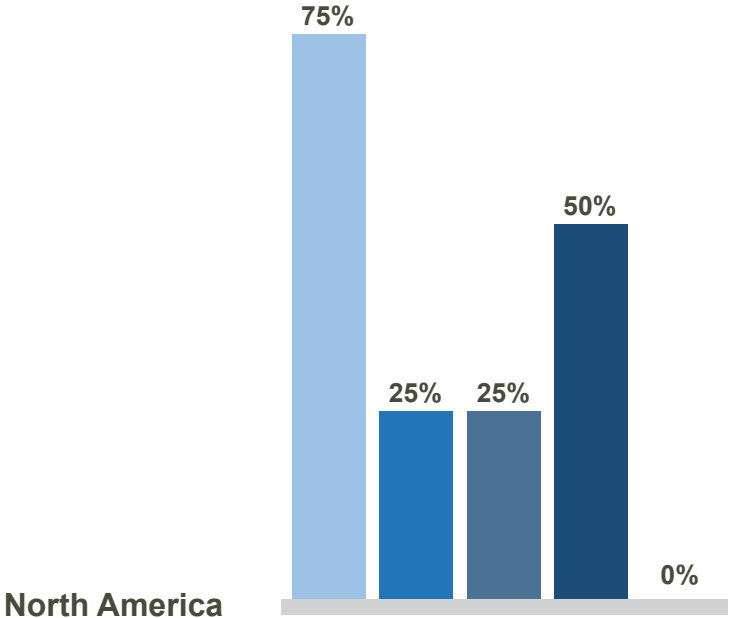
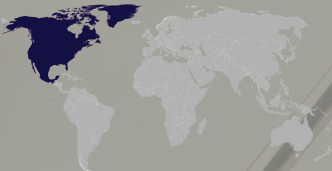
## North America



## World



# Expanded activities (for venues only) North America

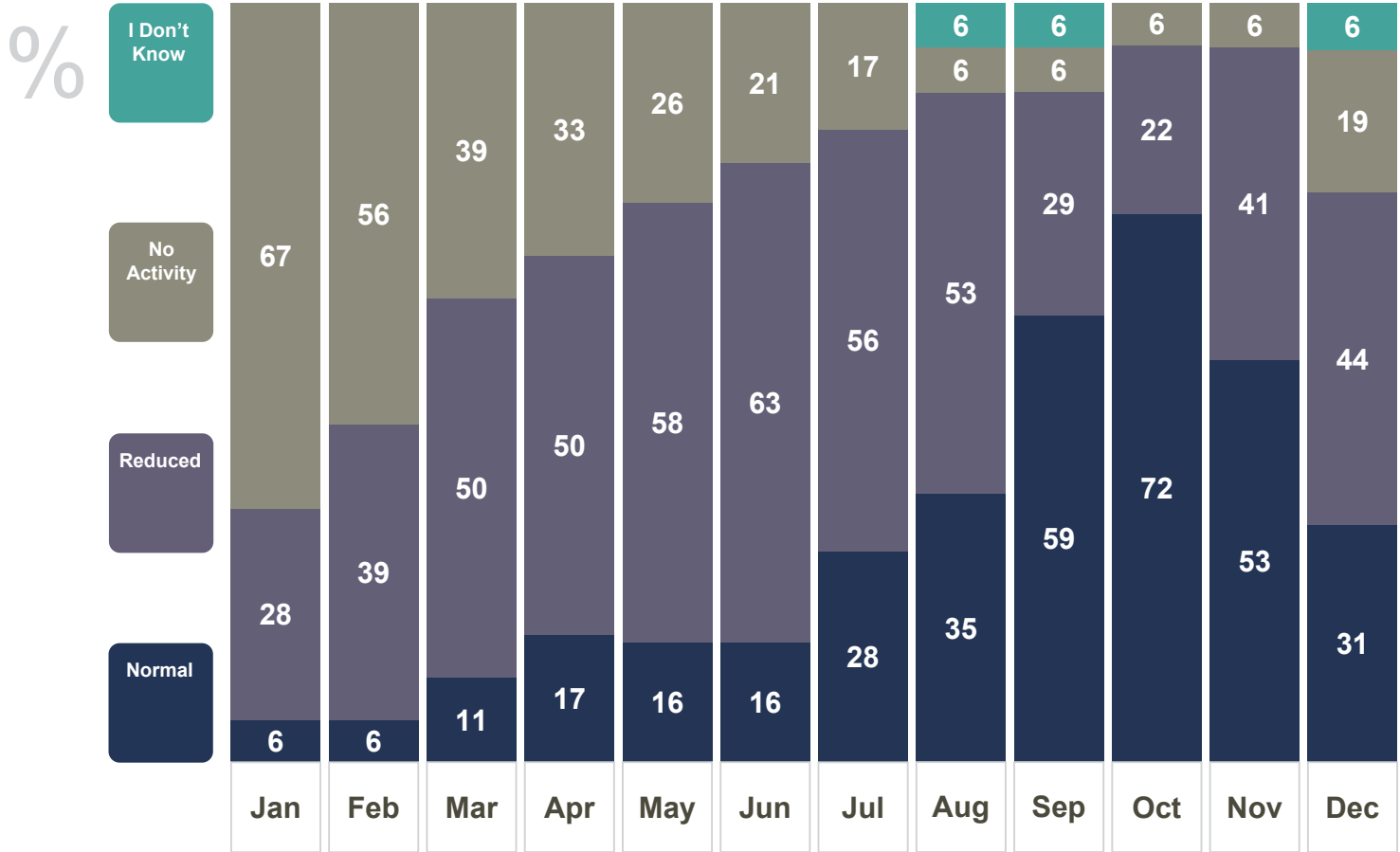


- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital

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

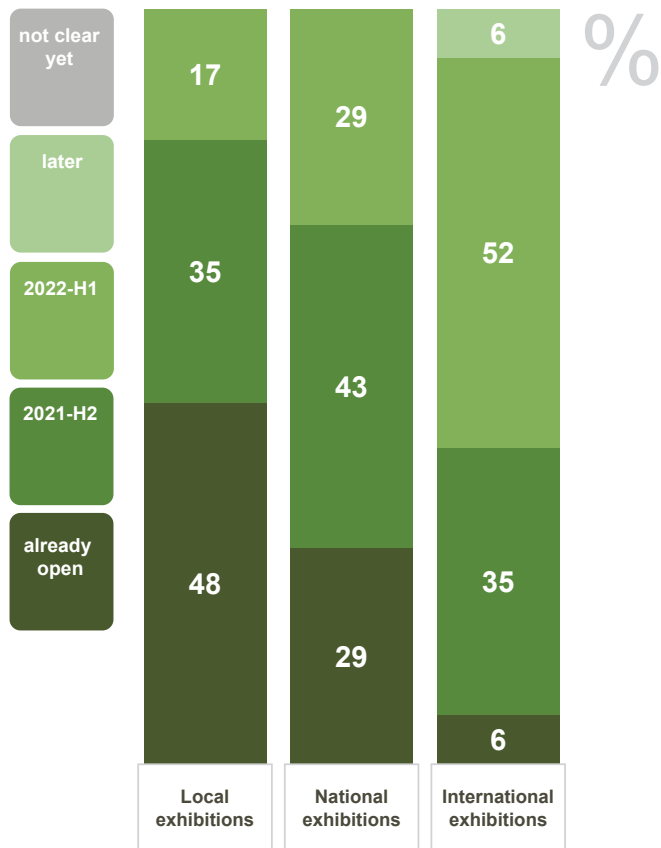


## Situation of industry operations in 2021

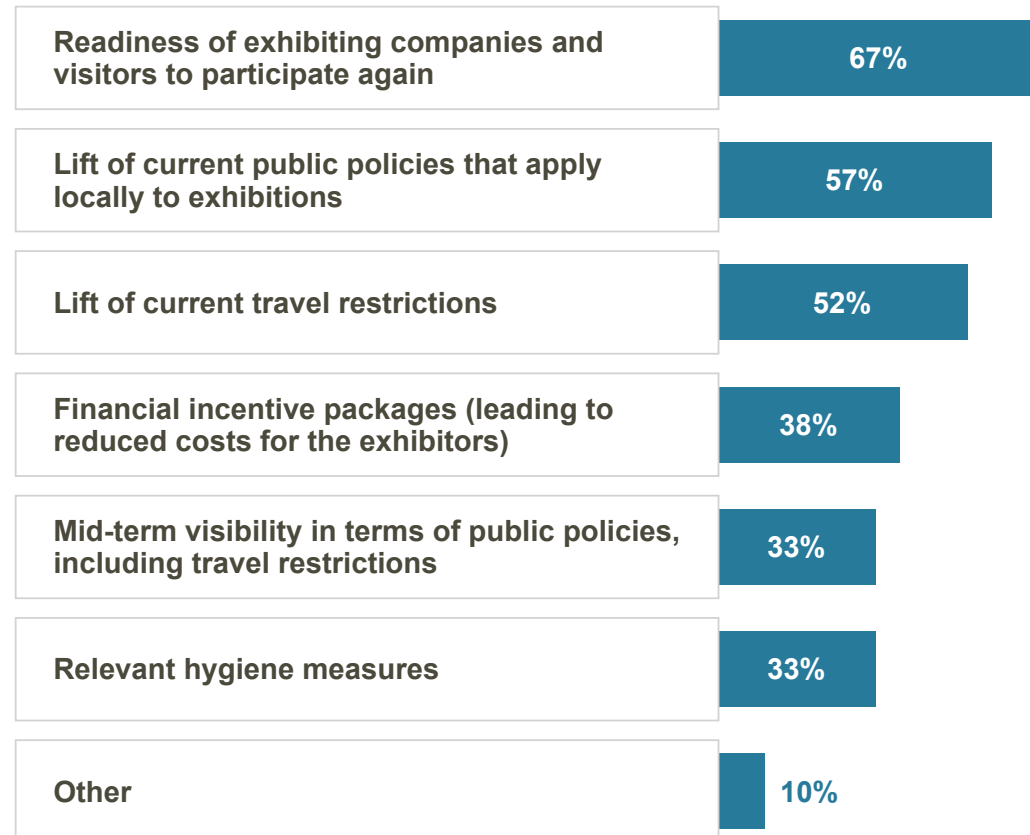




## When do you believe exhibitions will open again in your city?

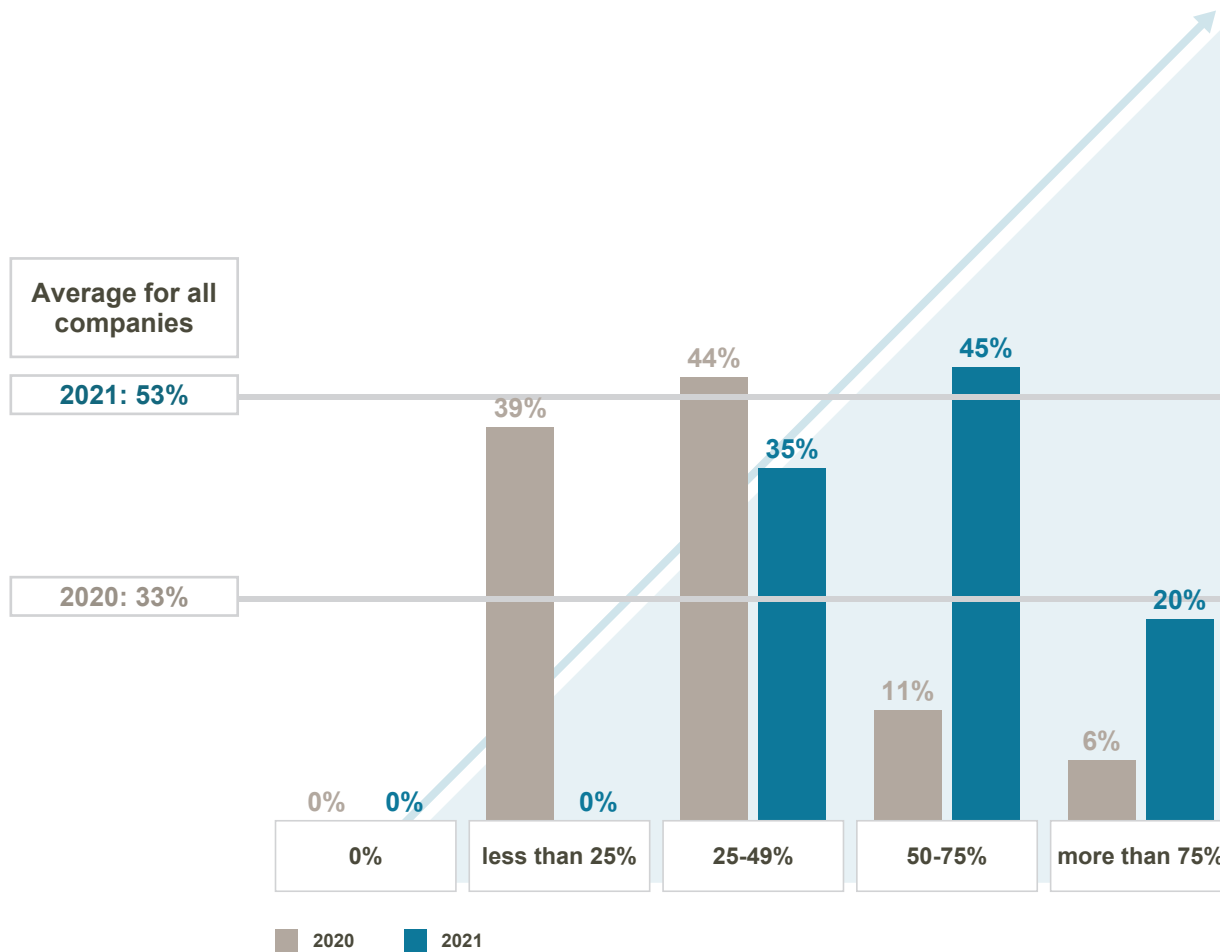


## What do you believe would most help the “bounce back” of exhibitions?

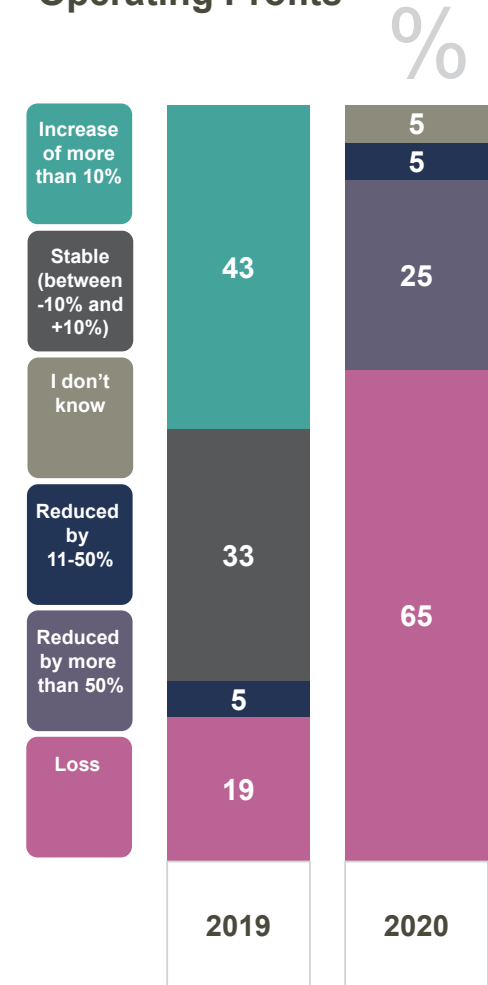




## Revenue compared to 2019



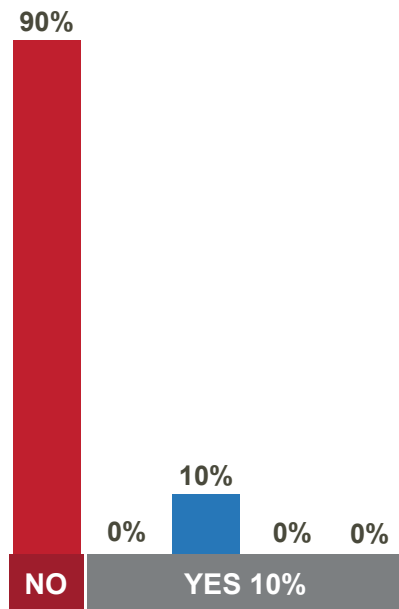
## Operating Profits



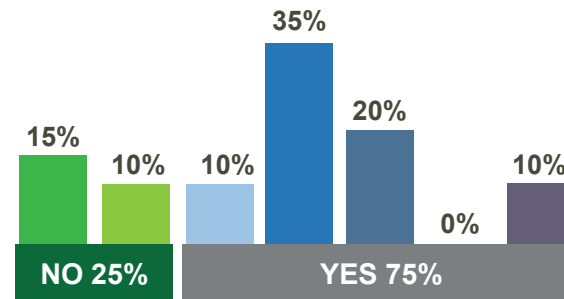
# Detailed results for Mexico



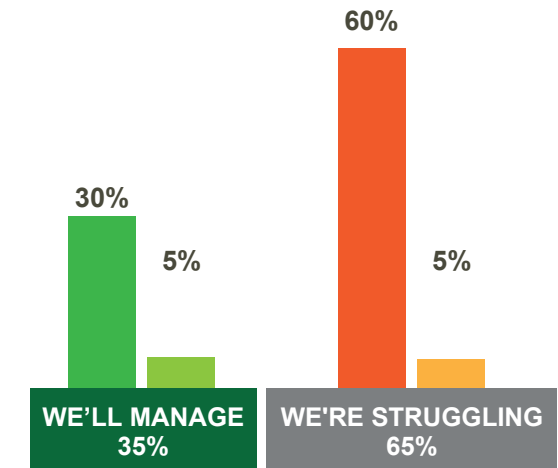
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

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

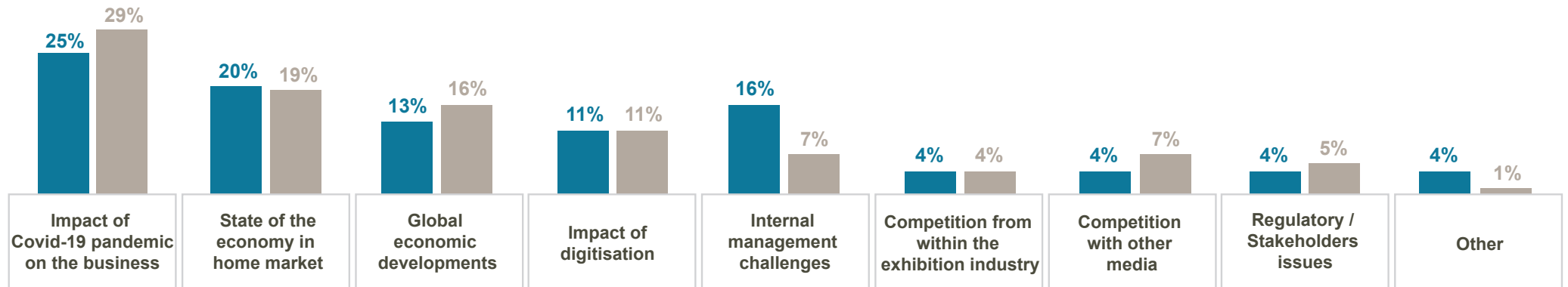


# Detailed results for Mexico



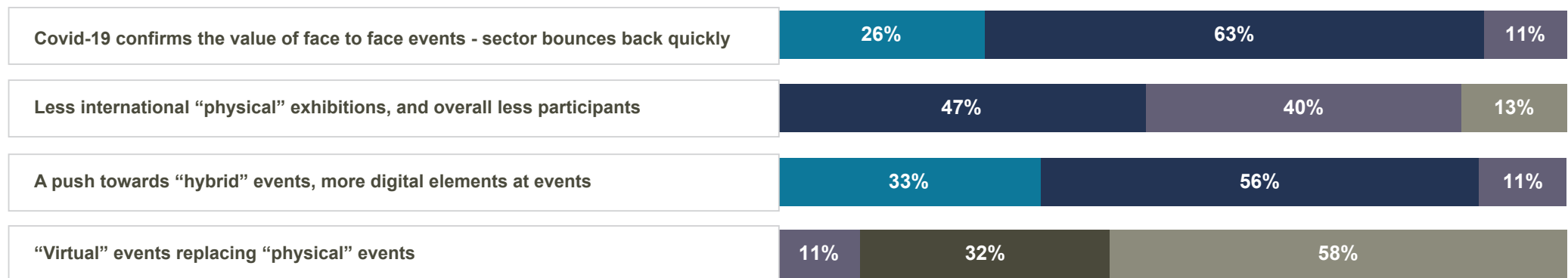
## Most important business issues in the exhibition industry

Mexico Global



## Format of exhibitions in the coming years

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

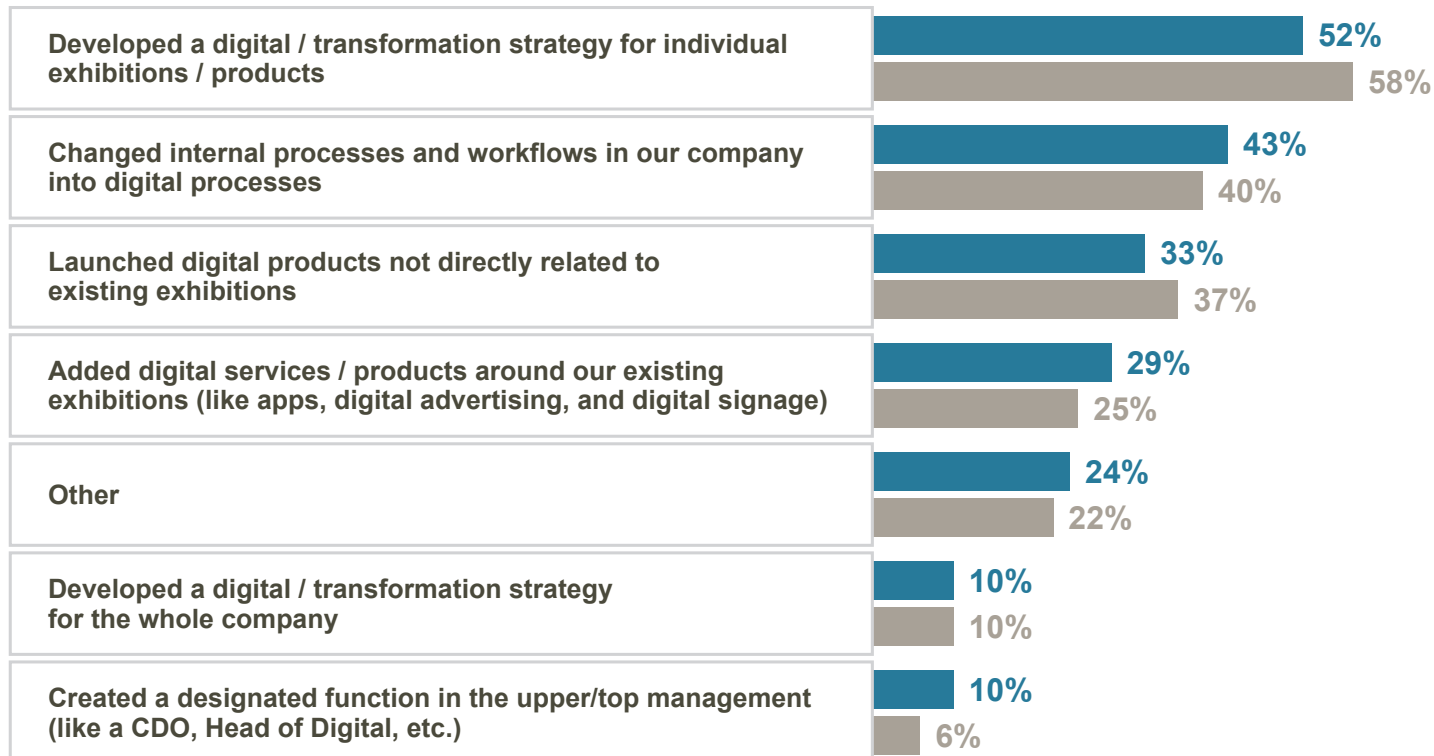




Mexico

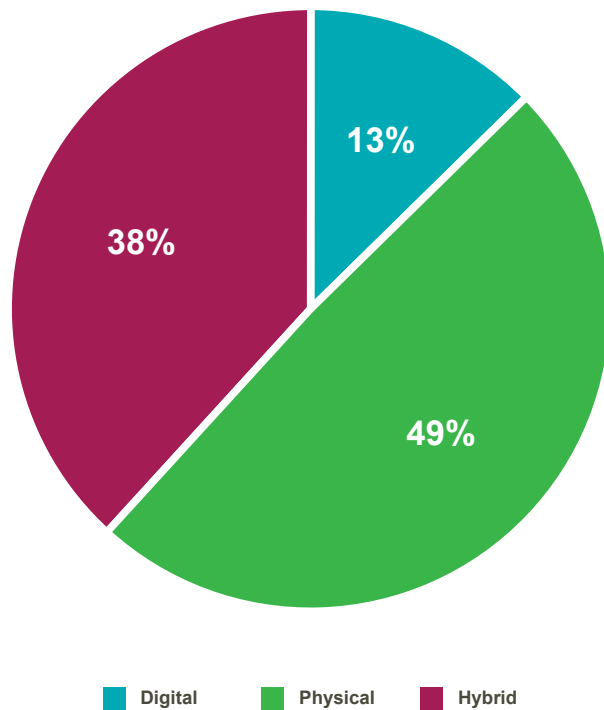
Global

## Digitisation: implementation in Mexico and globally

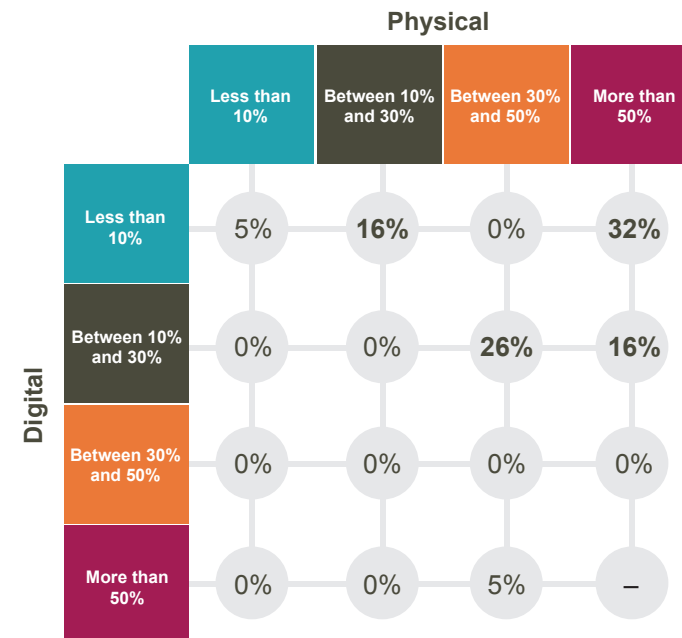


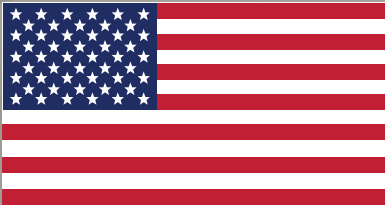


## Number of fairs projected in 2021

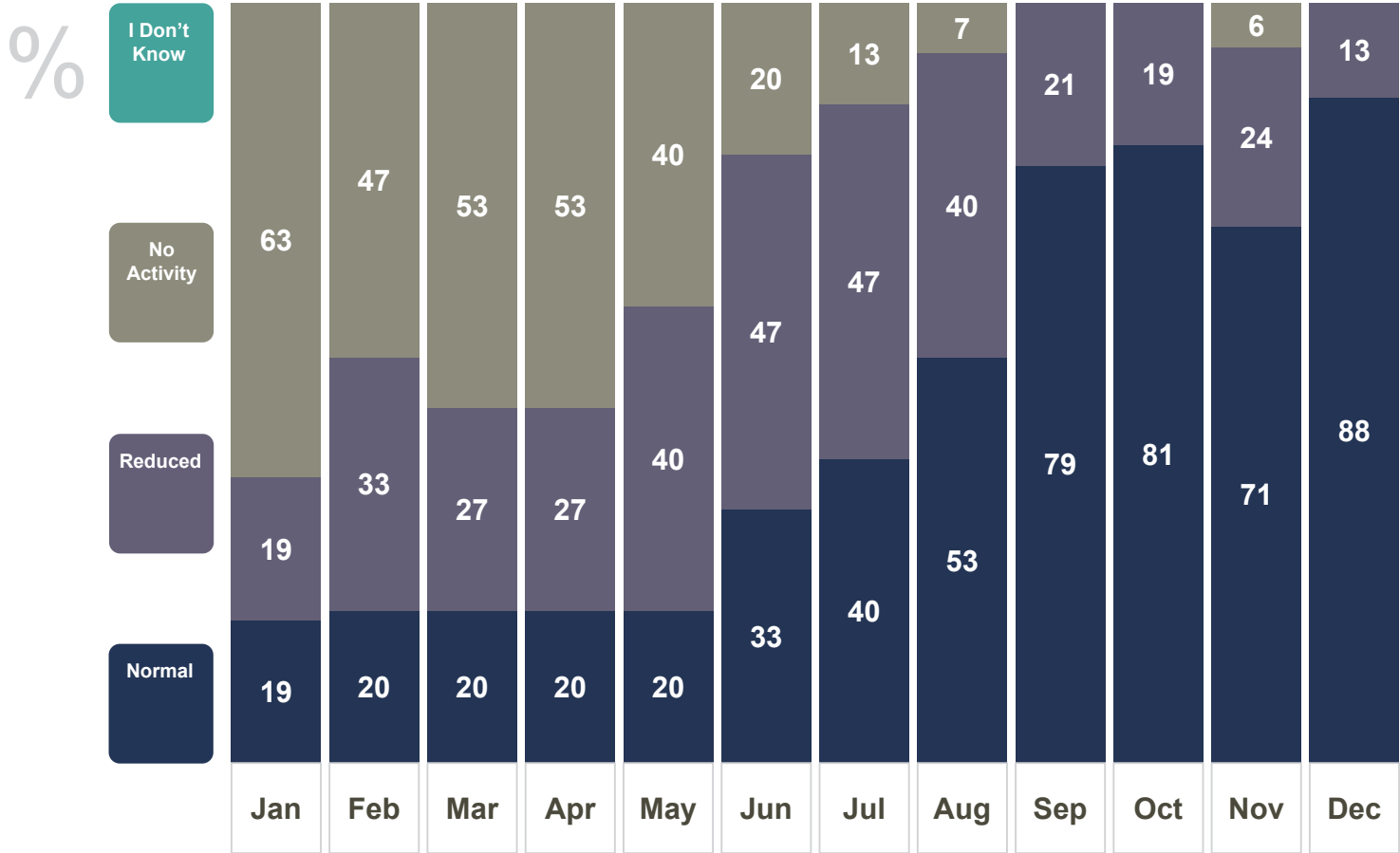


## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



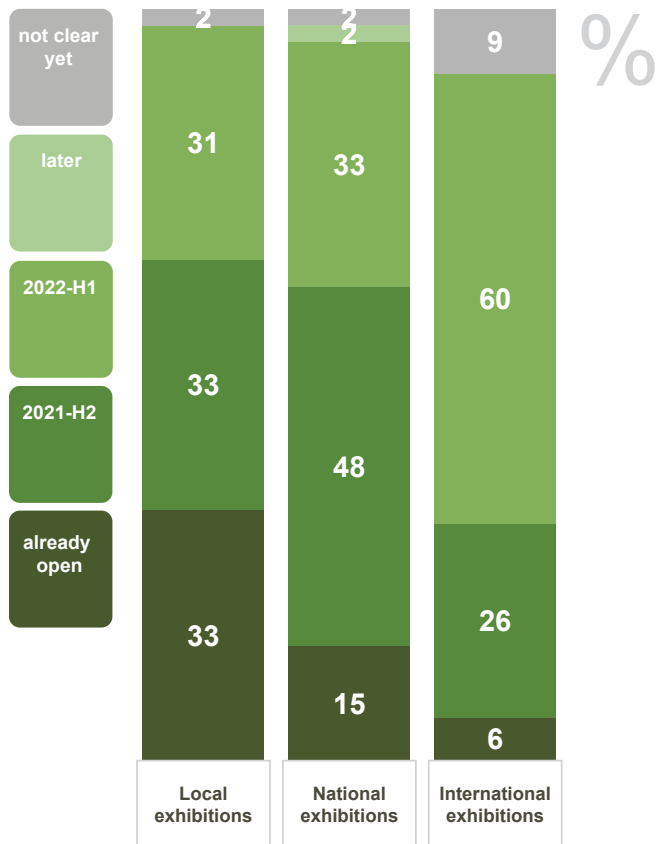


## Situation of industry operations in 2021

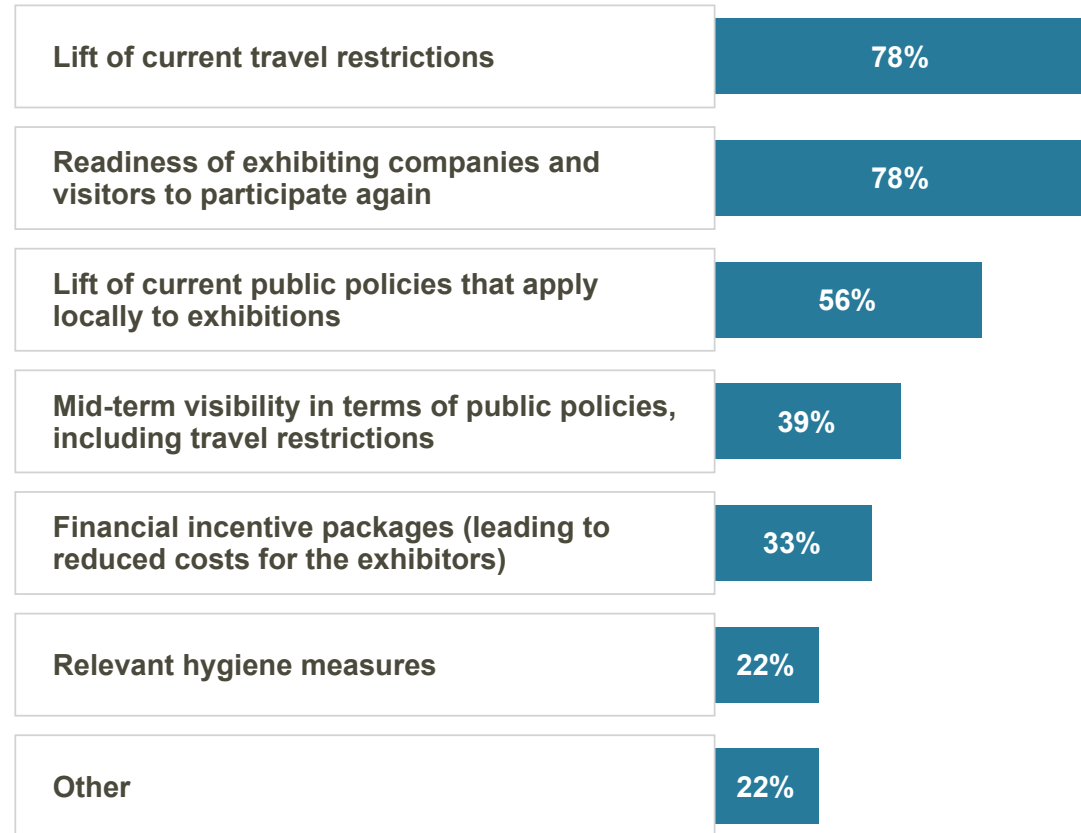




## When do you believe exhibitions will open again in your city?

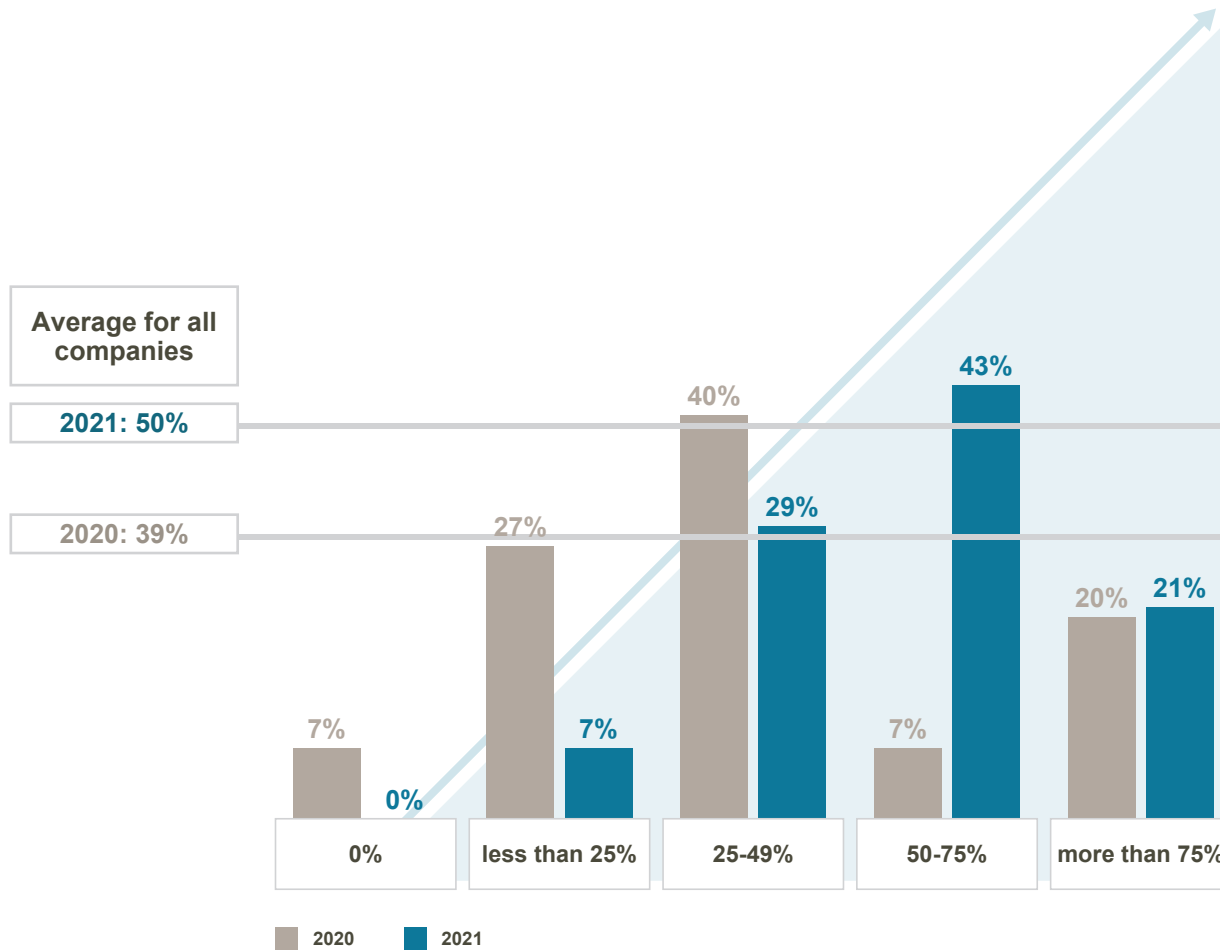


## What do you believe would most help the “bounce back” of exhibitions?

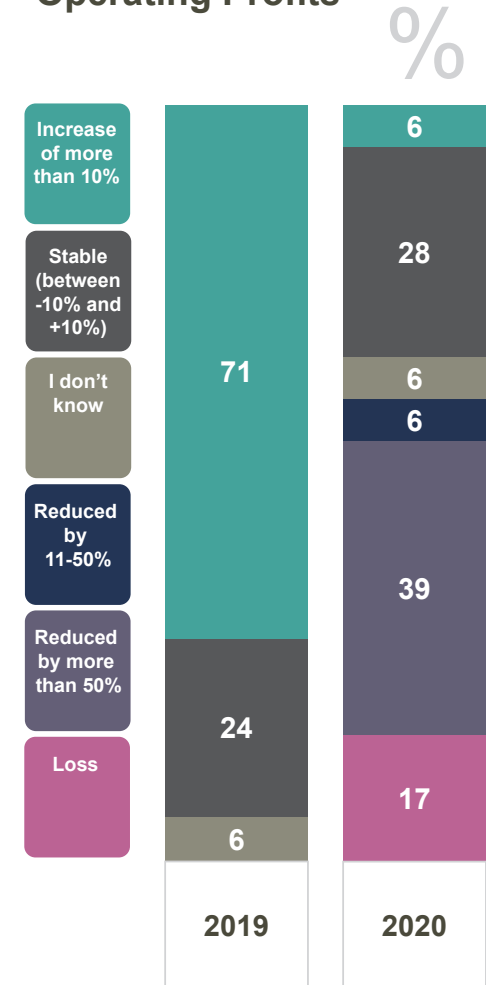




## Revenue compared to 2019

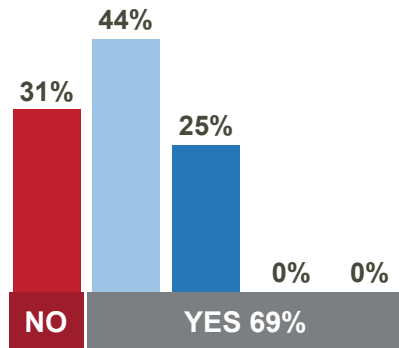


## Operating Profits

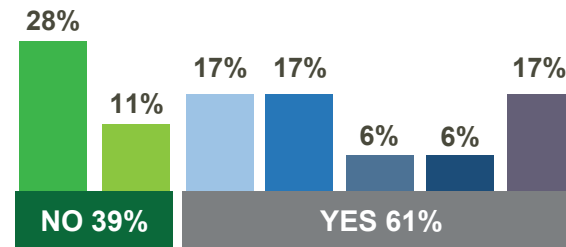




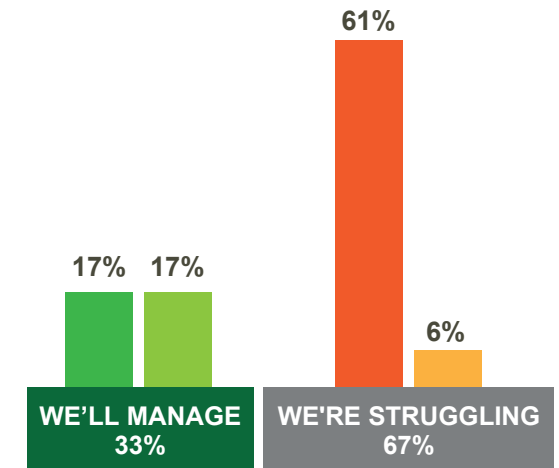
## Did your company benefit from public financial support?



## 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

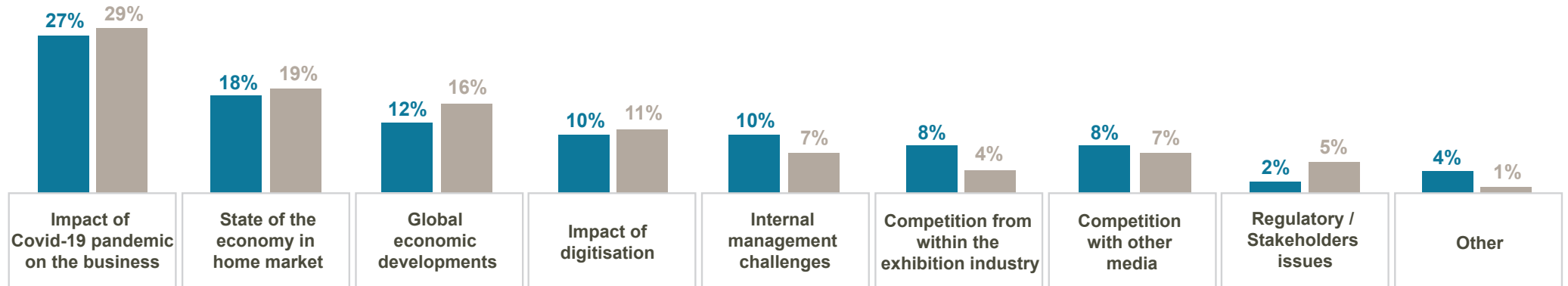
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



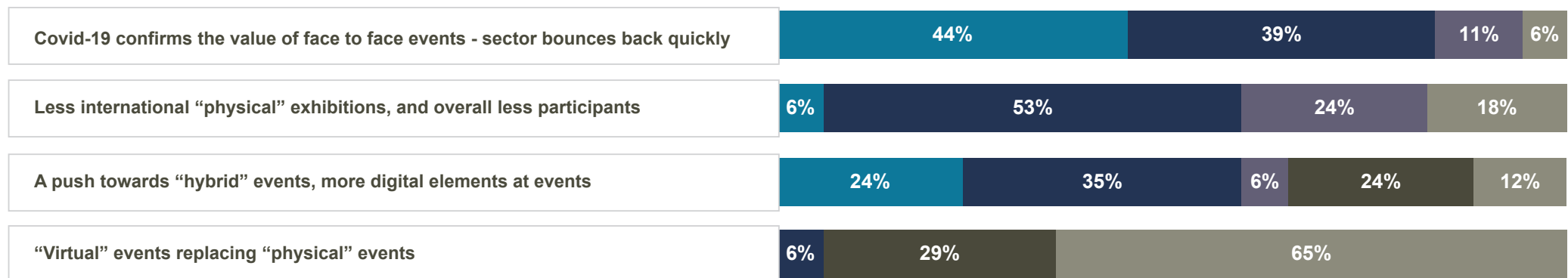
## Most important business issues in the exhibition industry

**USA** Global



## Format of exhibitions in the coming years

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

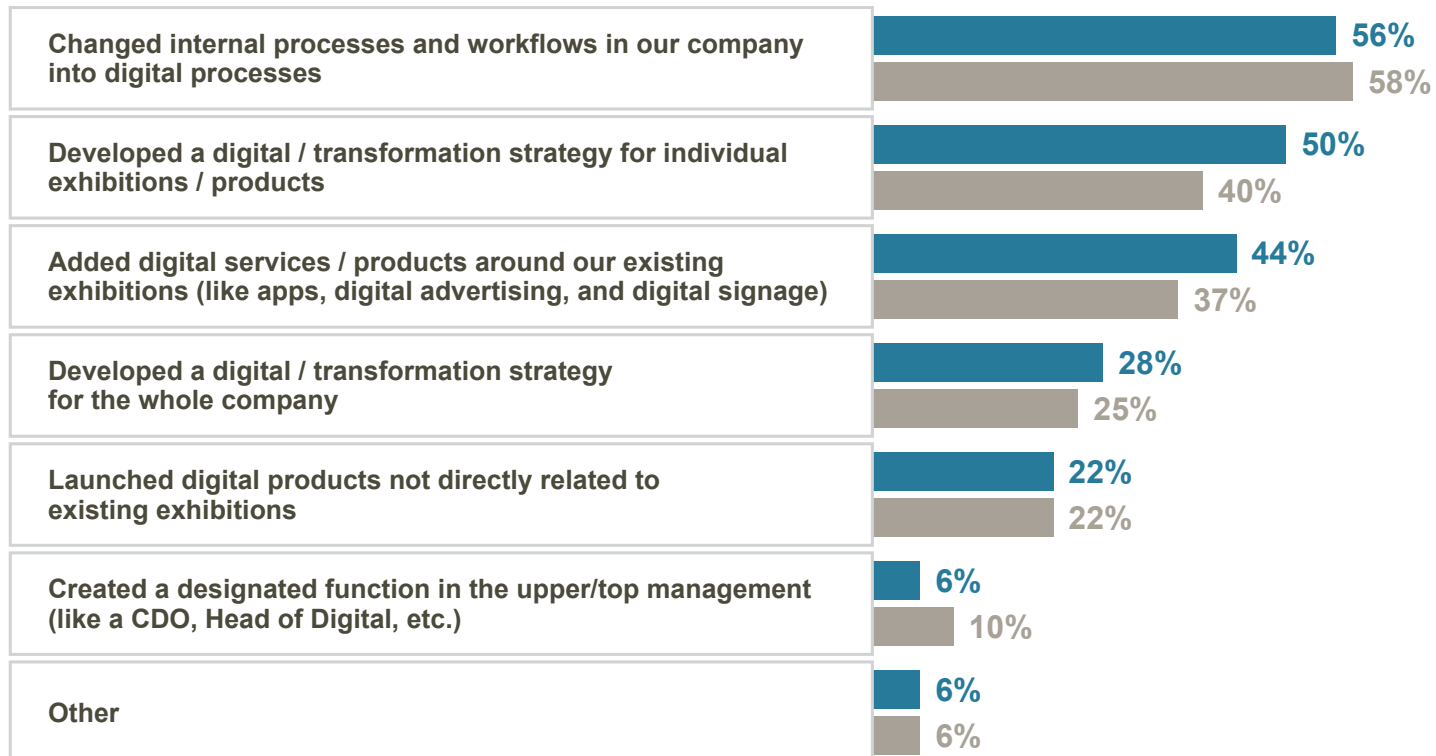






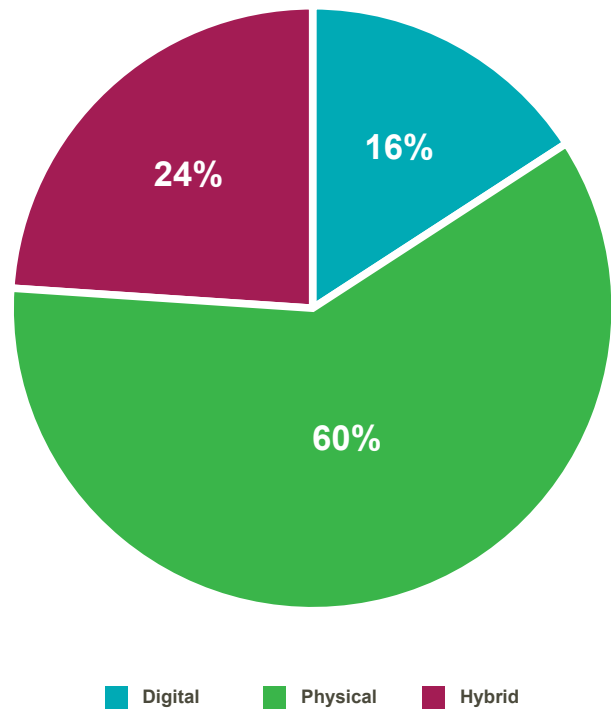
USA
Global

## Digitisation: implementation in USA and globally

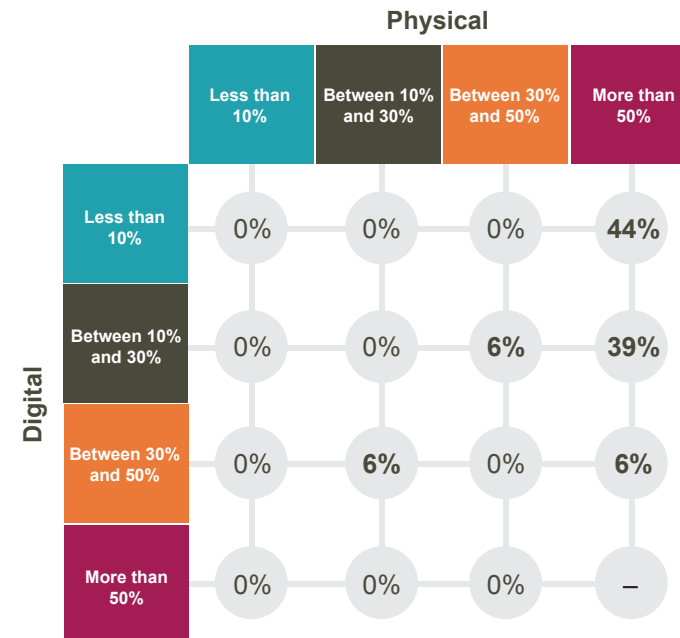




Number of fairs projected in 2021



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



A network of interconnected nodes and lines on a red background. The nodes are represented by circular shapes with a dark red center and a lighter red outer ring, connected by thin, light red lines. The network is dense and covers most of the page.

# Central & South America

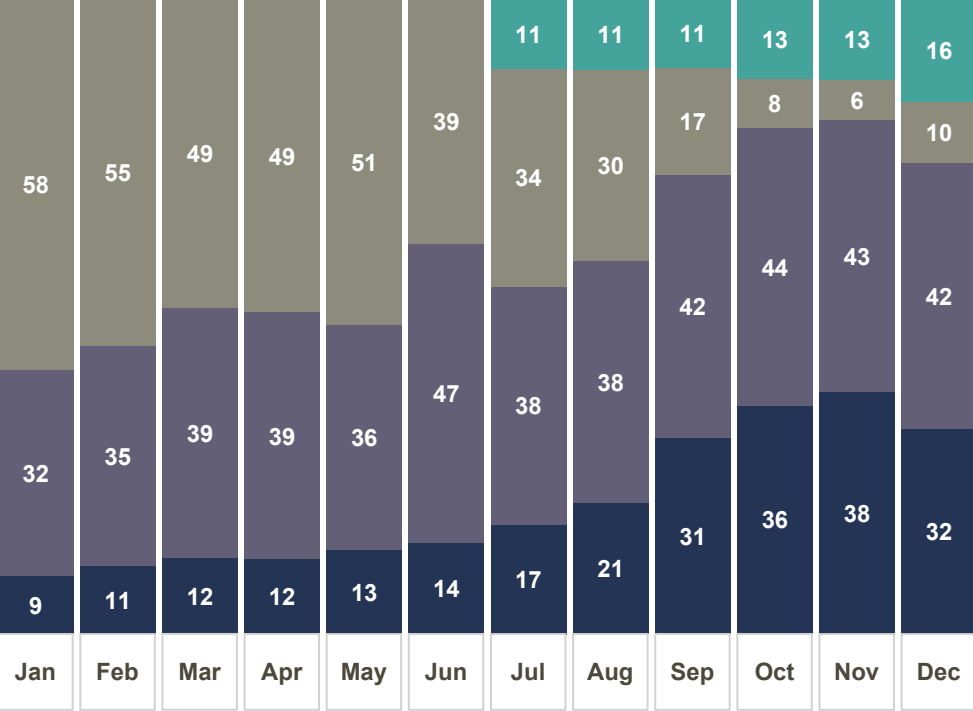
# Operations - Reopening Exhibitions Central & South America



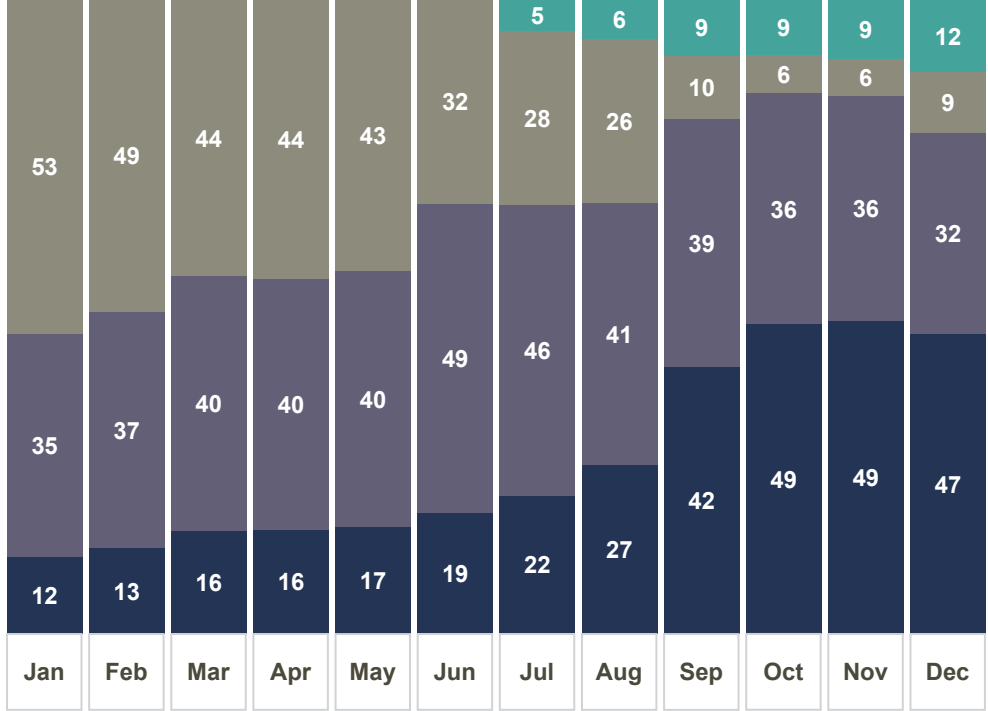
## Situation of industry operations in 2021



### Central & South America



### World



# Operations - Reopening Exhibitions Central & South America

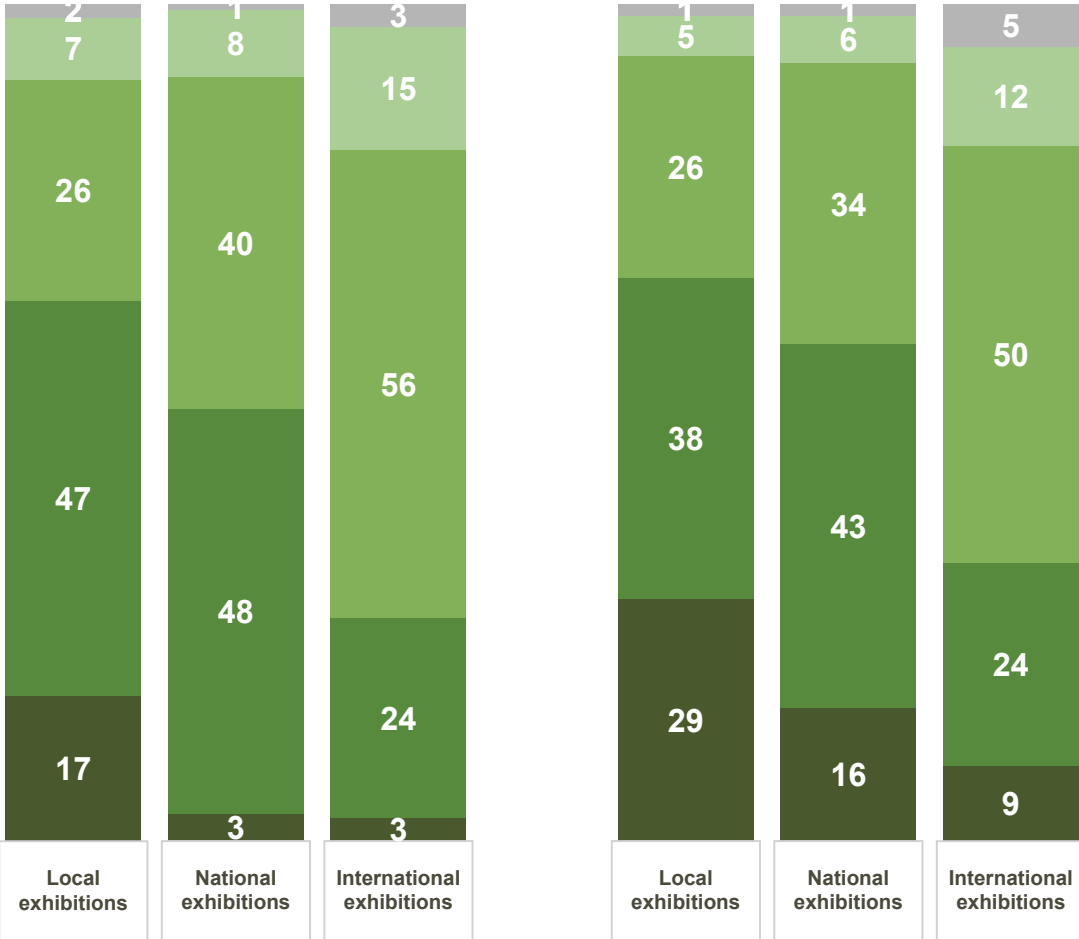


When do you believe exhibitions will open again in your city?

## Central & South America

## World

- not clear yet
- later
- 2022-H1
- 2021-H2
- already open

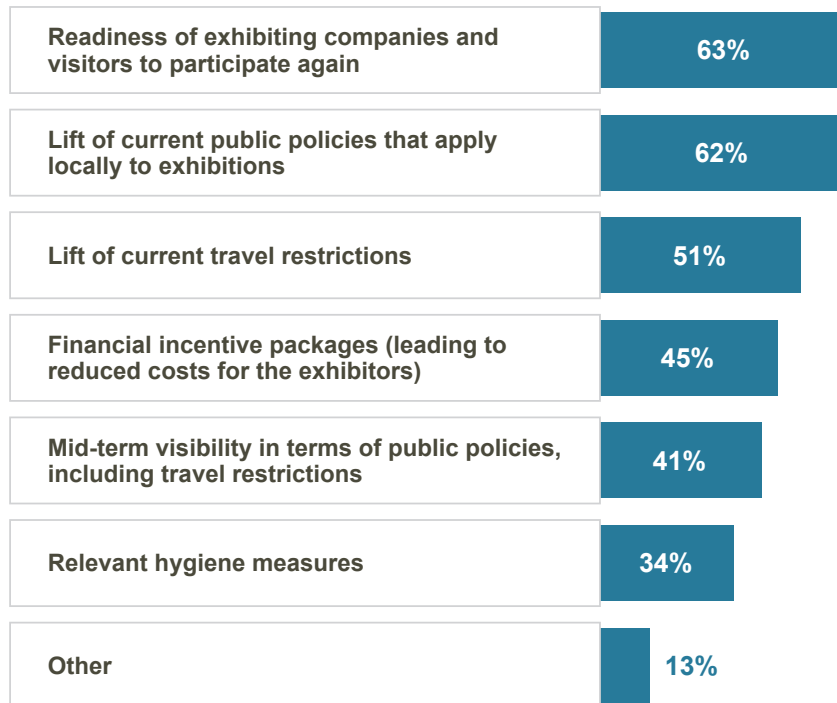


%

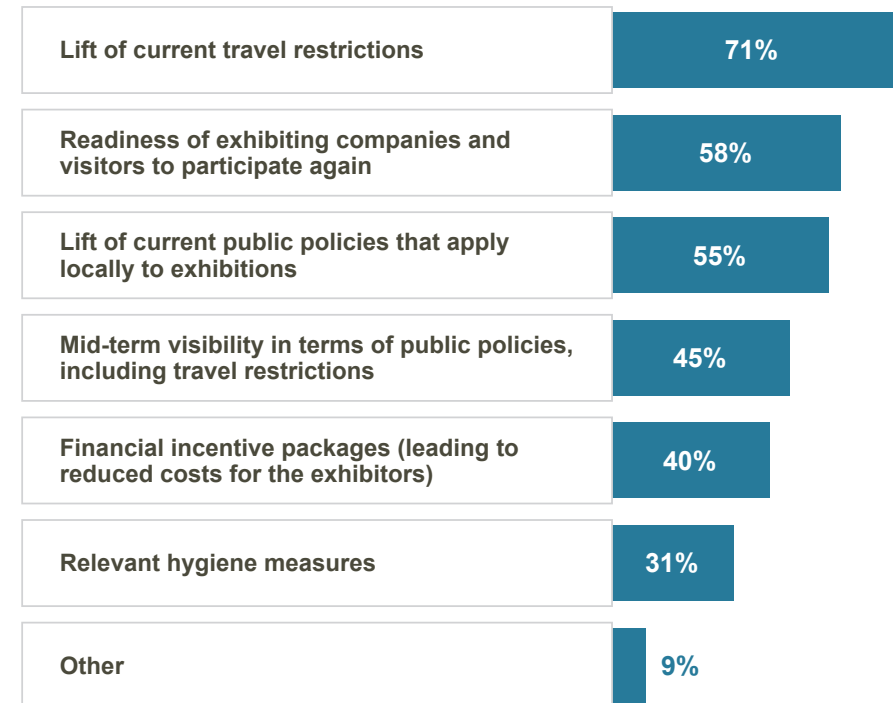


## What do you believe would most help the “bounce back” of exhibitions?

### Central & South America

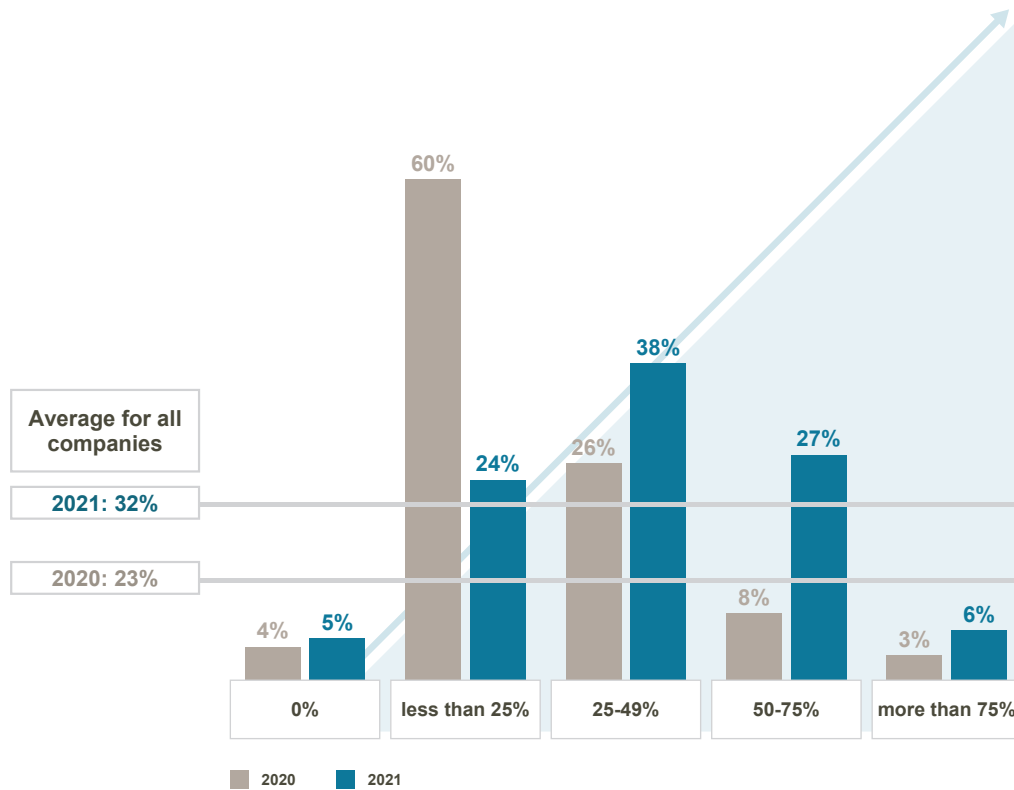


### World

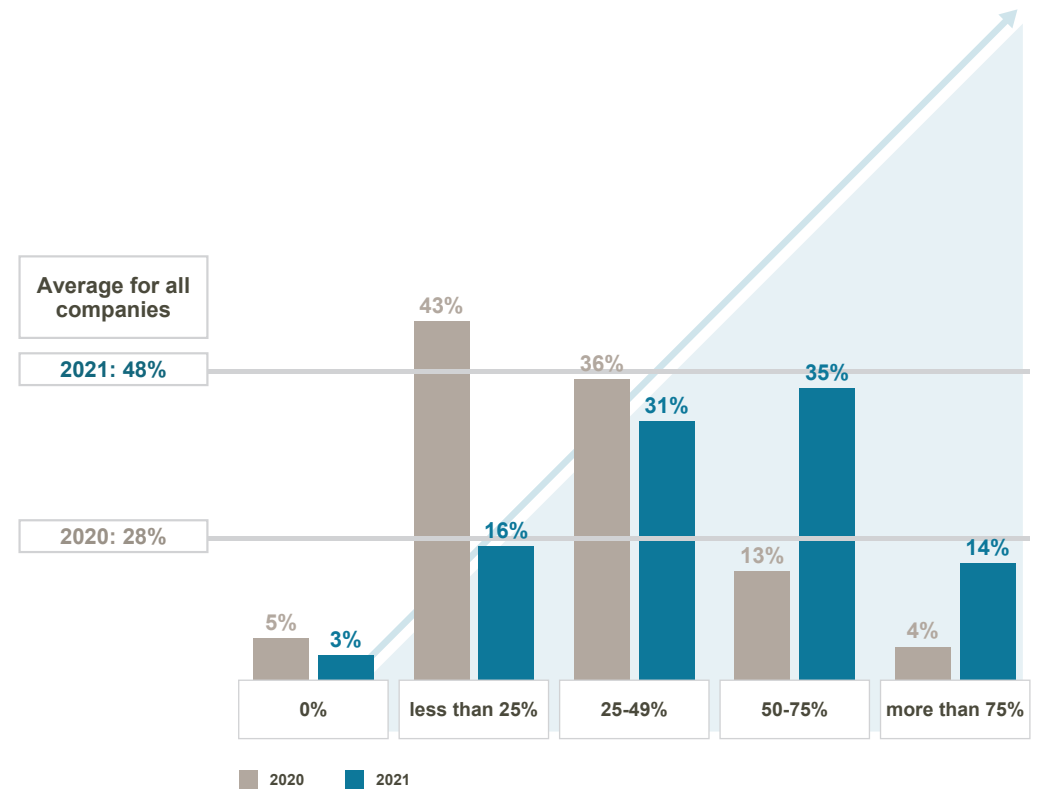




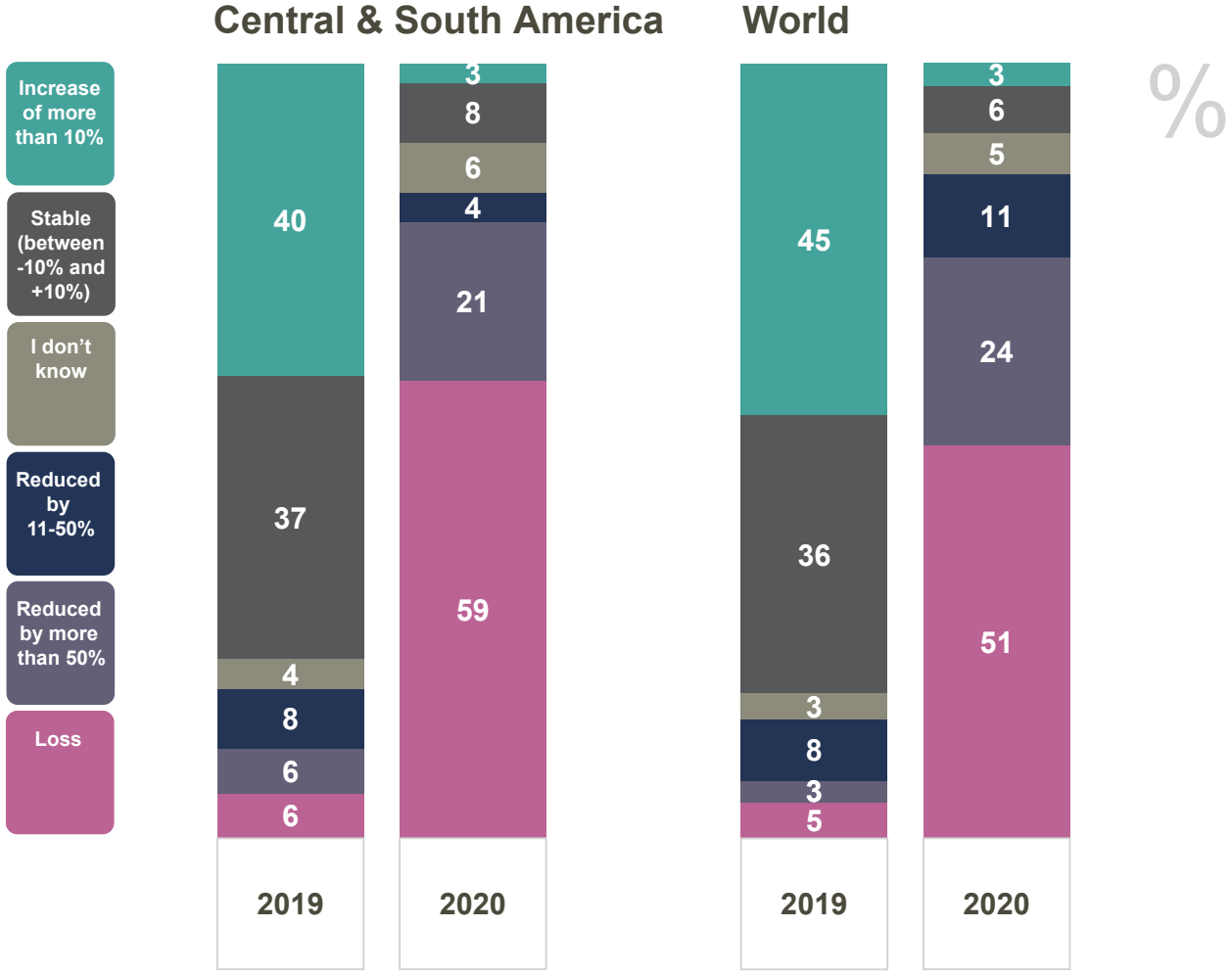
## Revenue compared to 2019 Central & South America



## World



# Operating Profits Central & South America



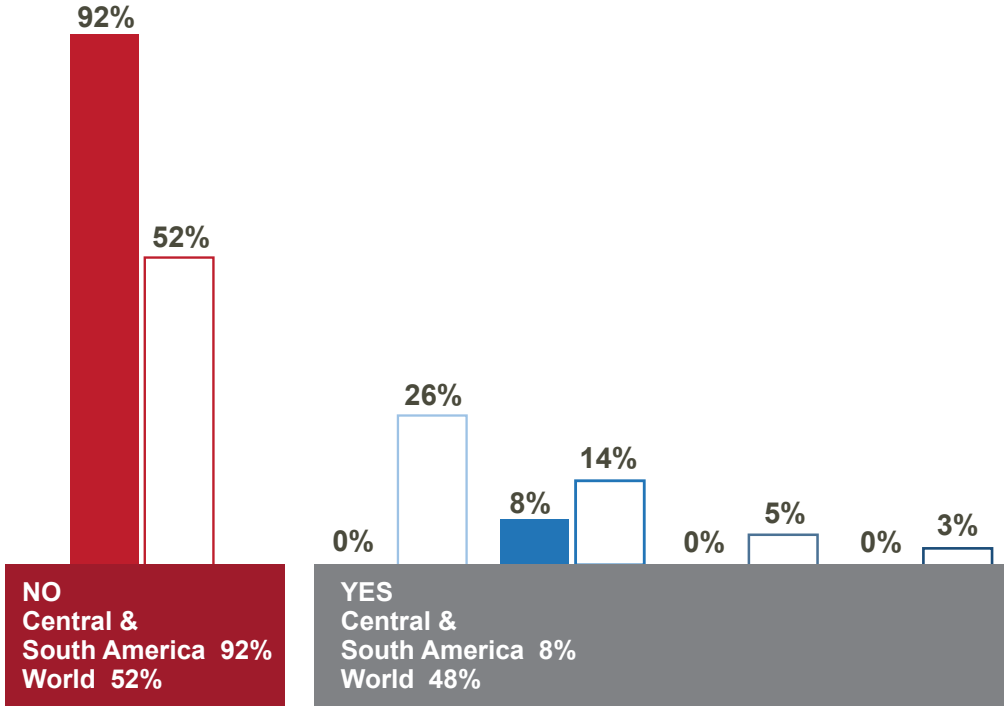


# Public Financial Support Central & South America

Did your company benefit from public financial support?

Central & South America    World

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

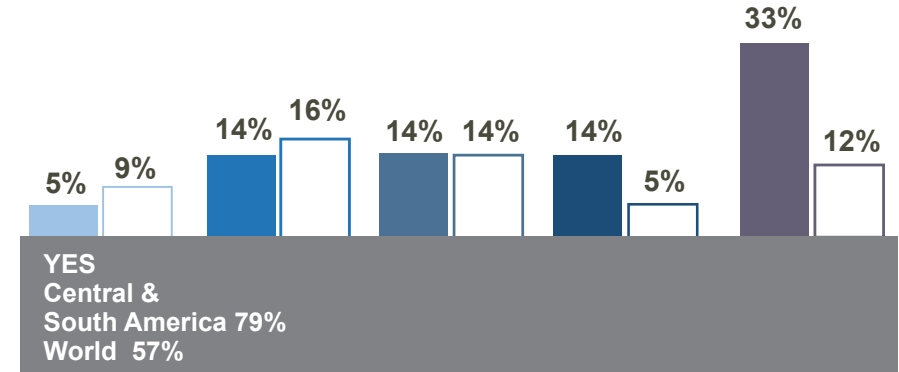
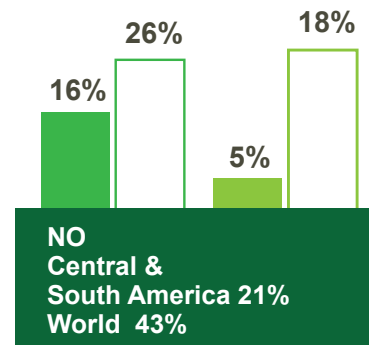


## Have you had to reduce your workforce?

Central & South America

World

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

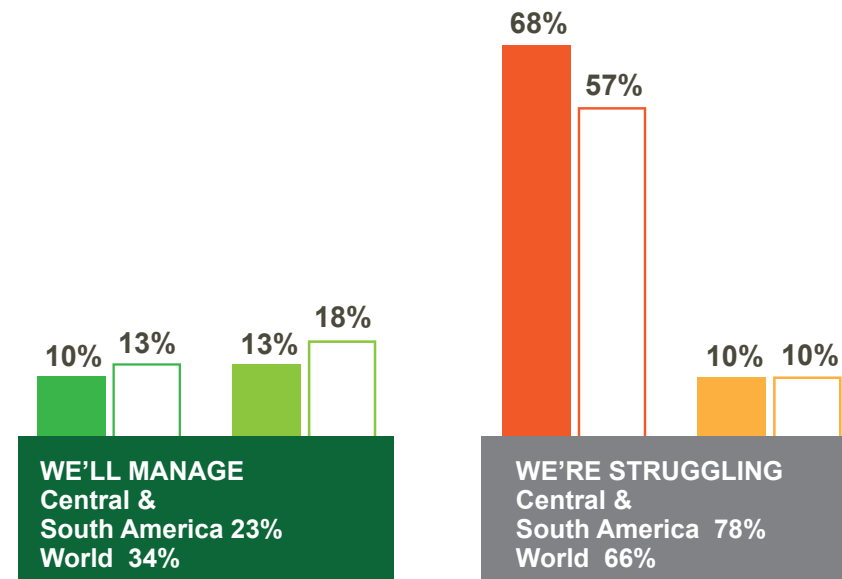


If there is no business for the next 6 months,  
which best applies?

Central & South 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

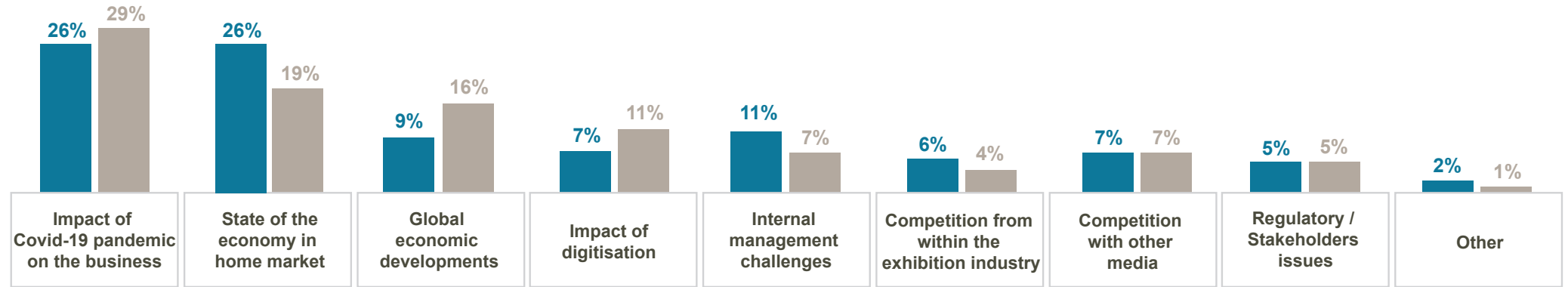


# Most Important Business Issues - Format of Exhibitions - Central & South America



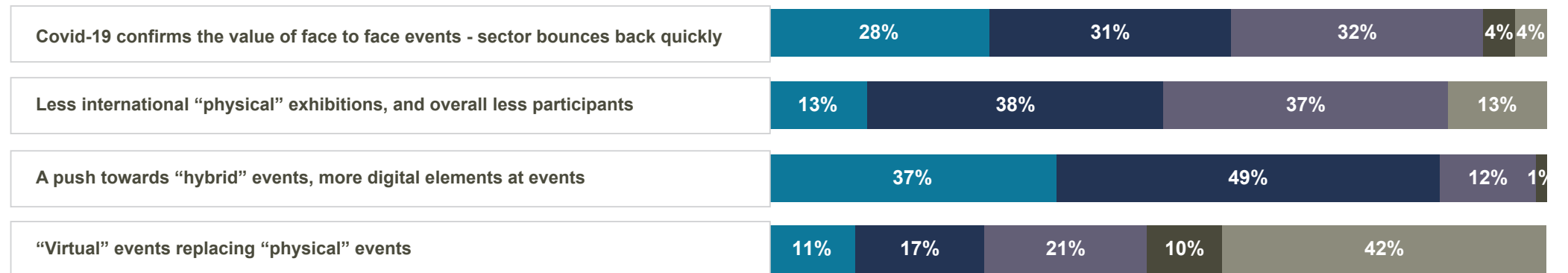
## Most important business issues in the exhibition industry

Central & South America Global



## Format of exhibitions in the coming years

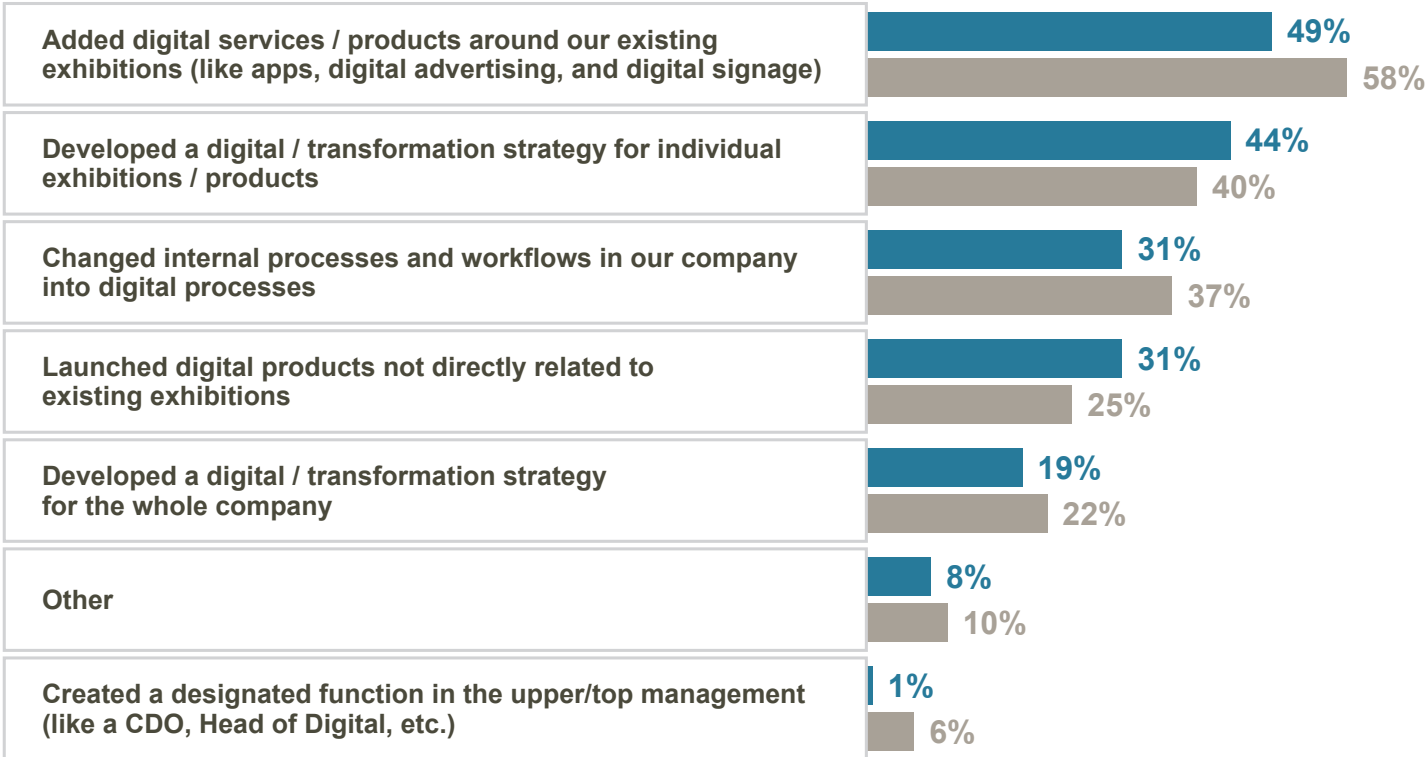
Yes, for sure Most probably Not sure Not sure at all Definitely not



Central & South America

Global

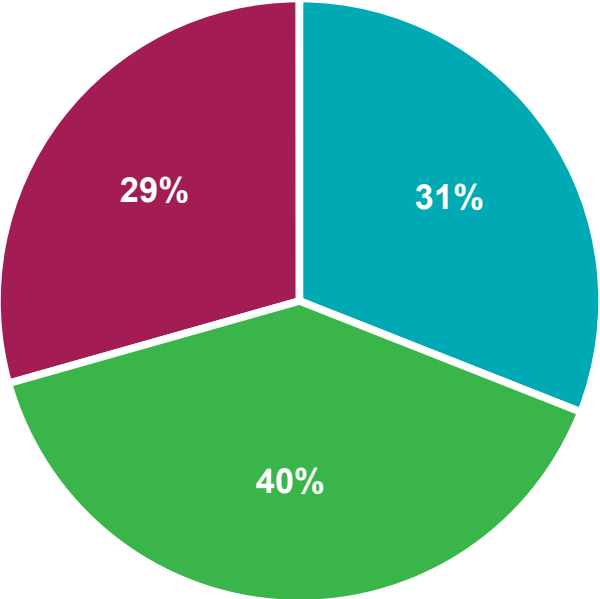
## Digitisation: implementation in Central and South America and globally



# Number of fairs projected in 2021 Central & South America

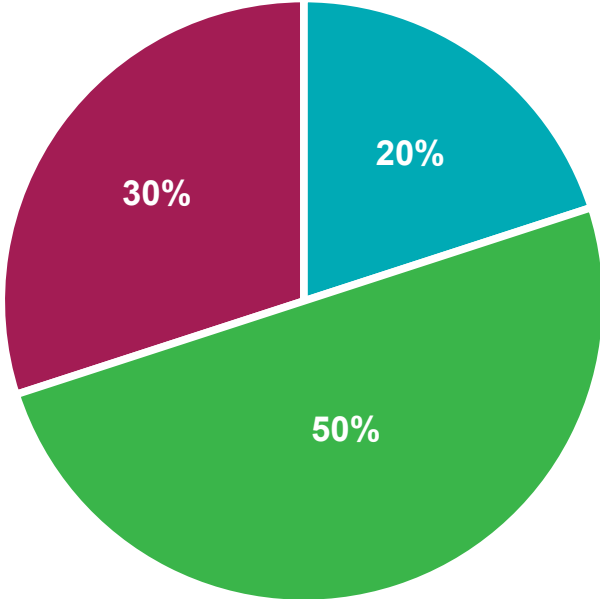


Central & South America



■ Digital ■ Physical ■ Hybrid

World

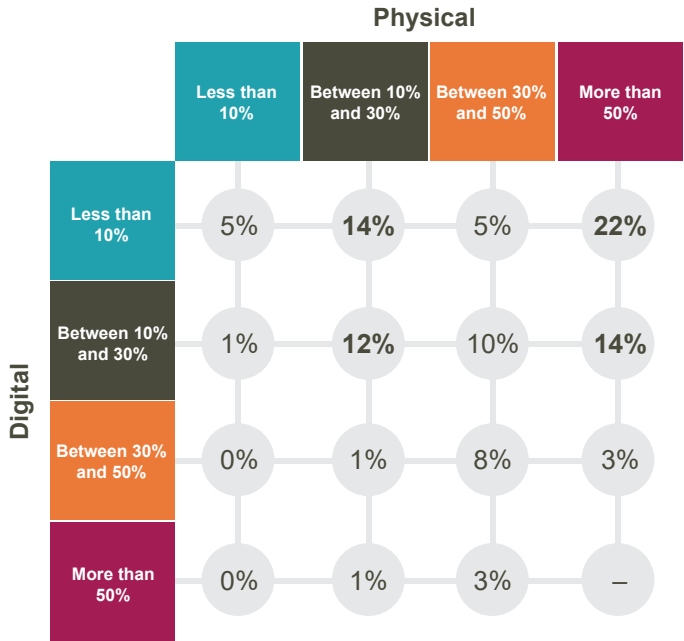


■ Digital ■ Physical ■ Hybrid

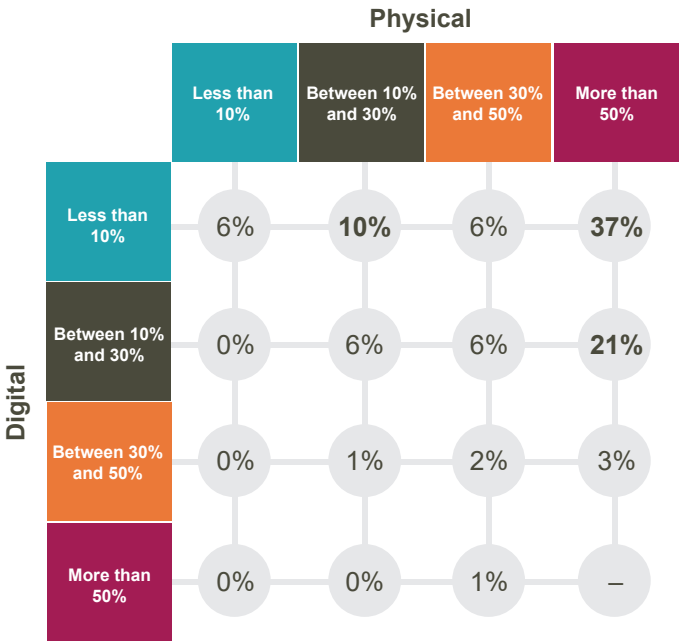
# Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



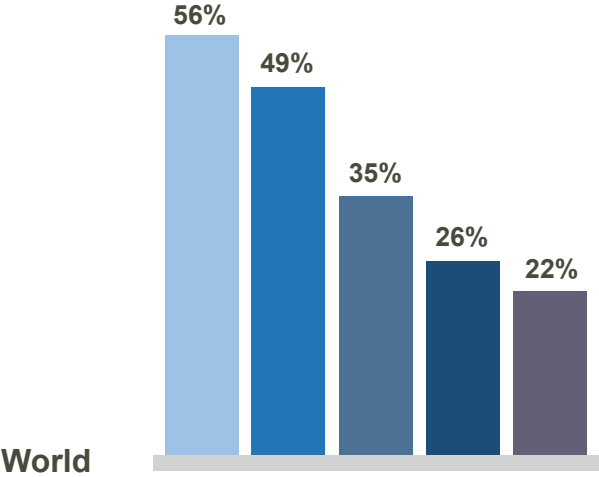
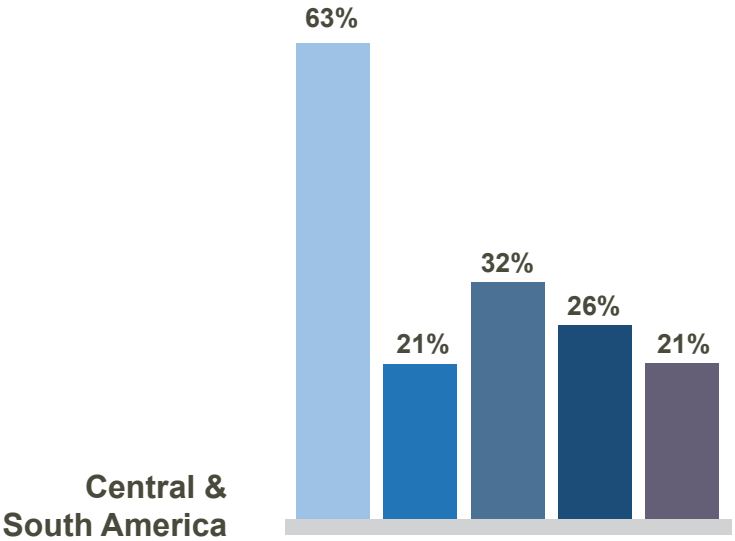
## Central & South America



## World



# Expanded activities (for venues only) Central & South America



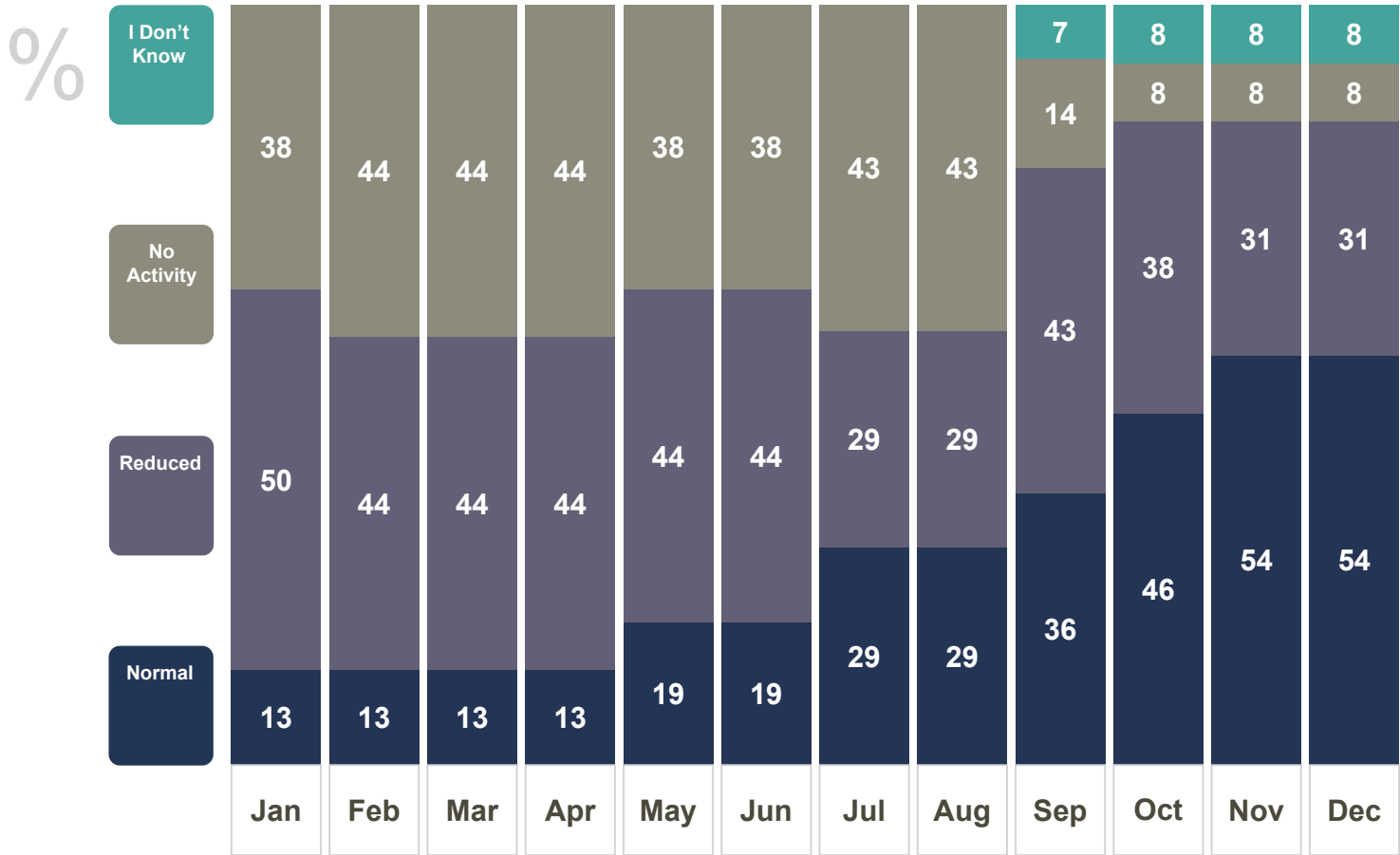
- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital

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



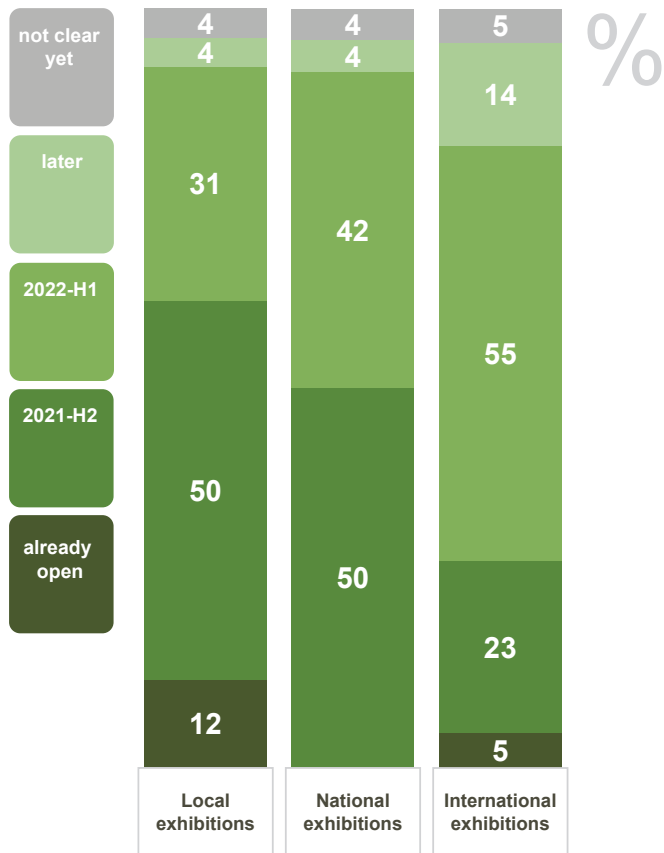


## Situation of industry operations in 2021

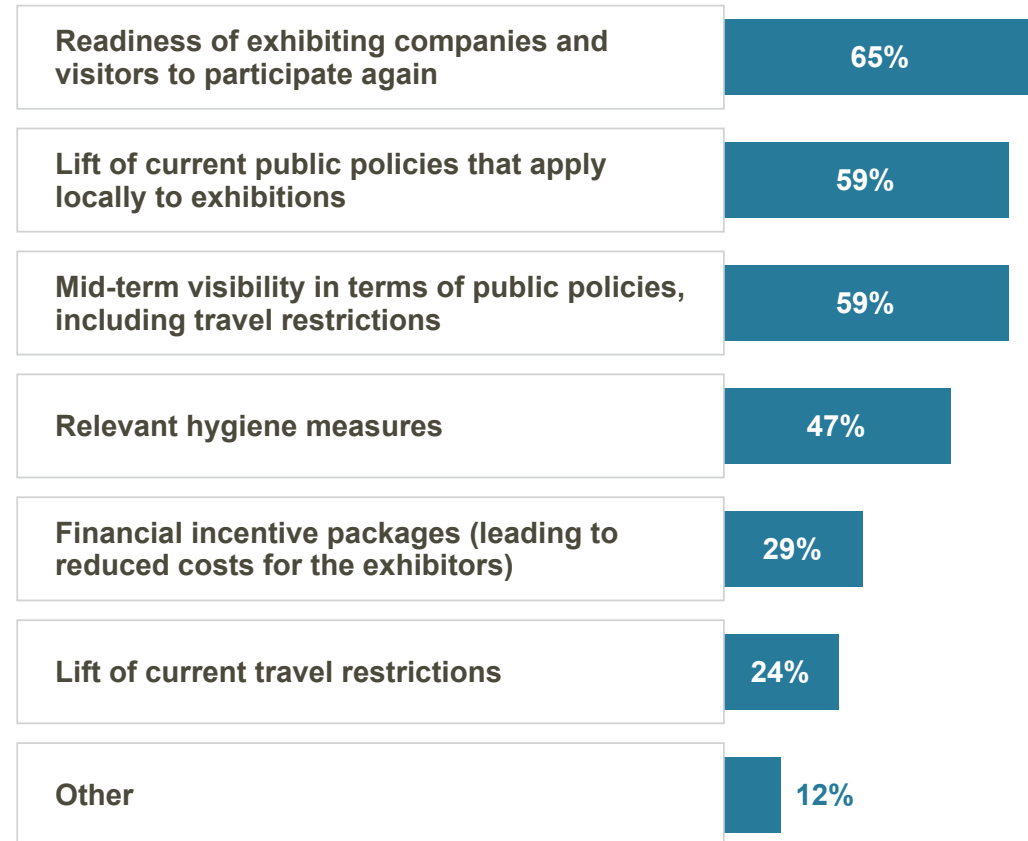




## When do you believe exhibitions will open again in your city?

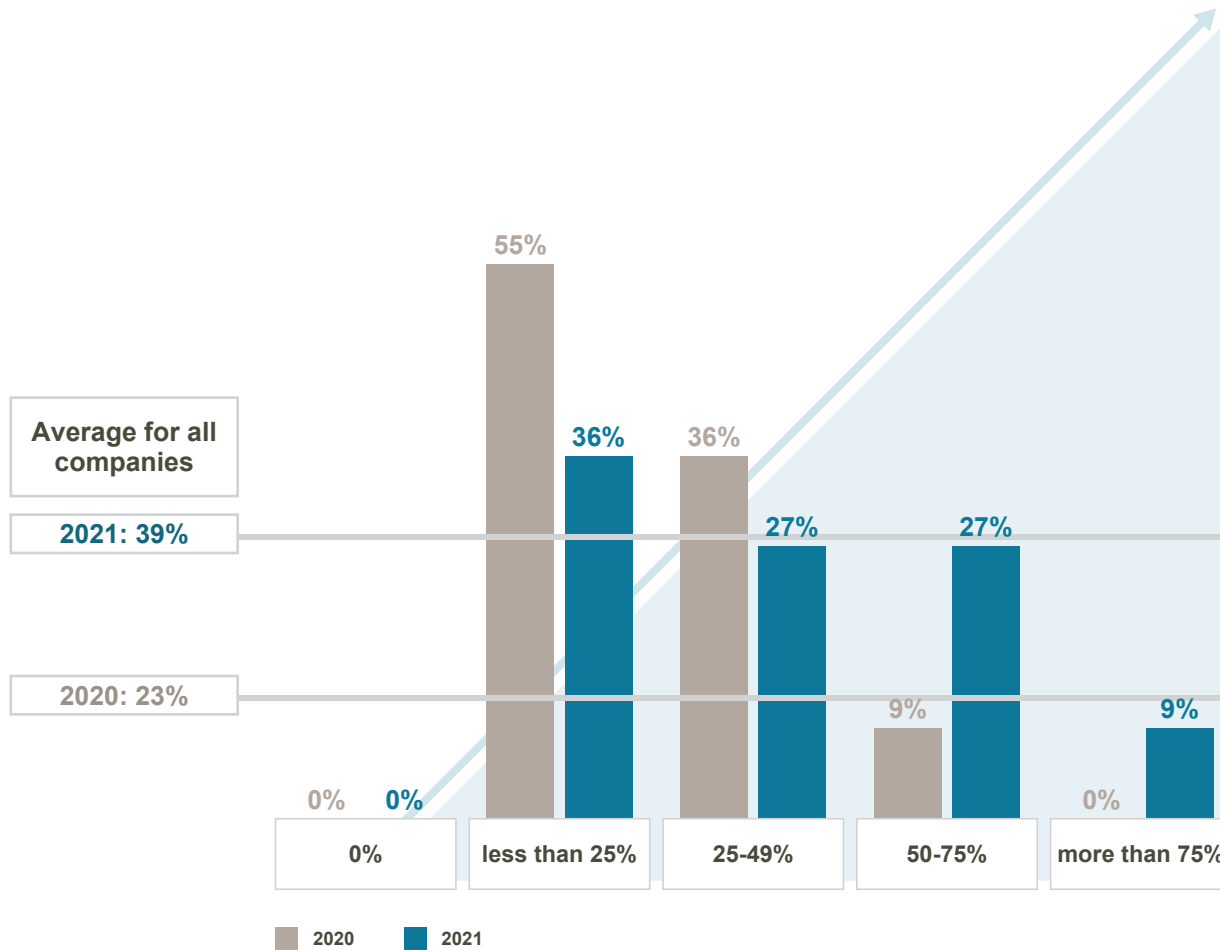


## What do you believe would most help the “bounce back” of exhibitions?

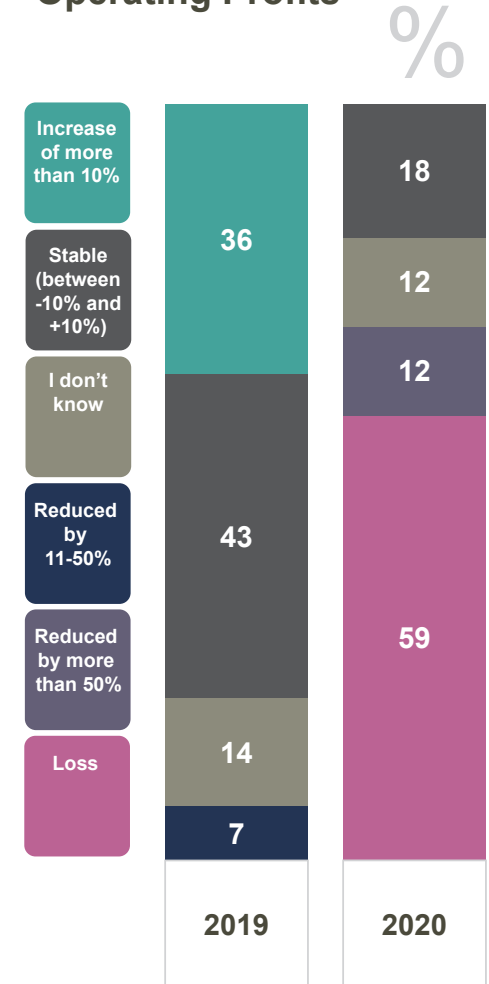




## Revenue compared to 2019



## Operating Profits

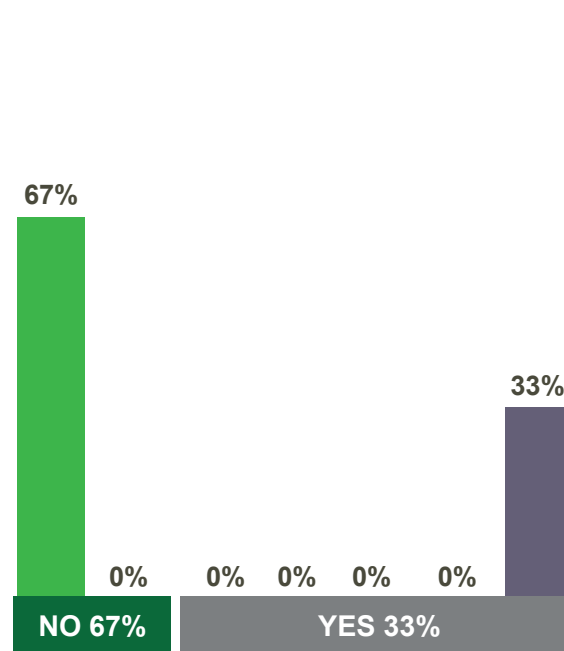




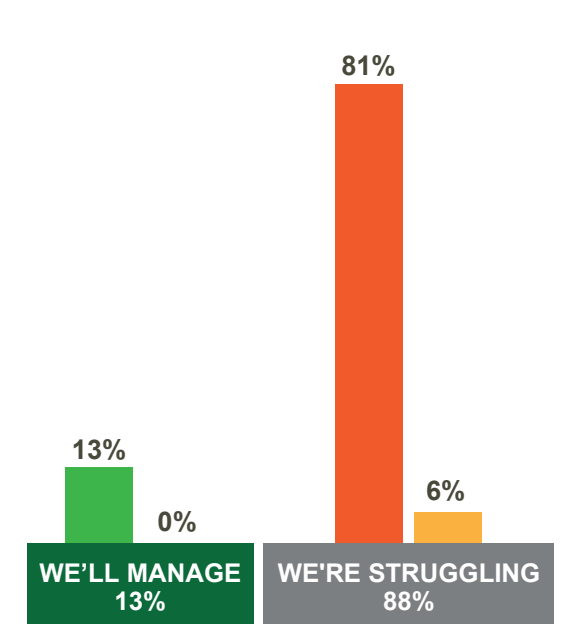
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

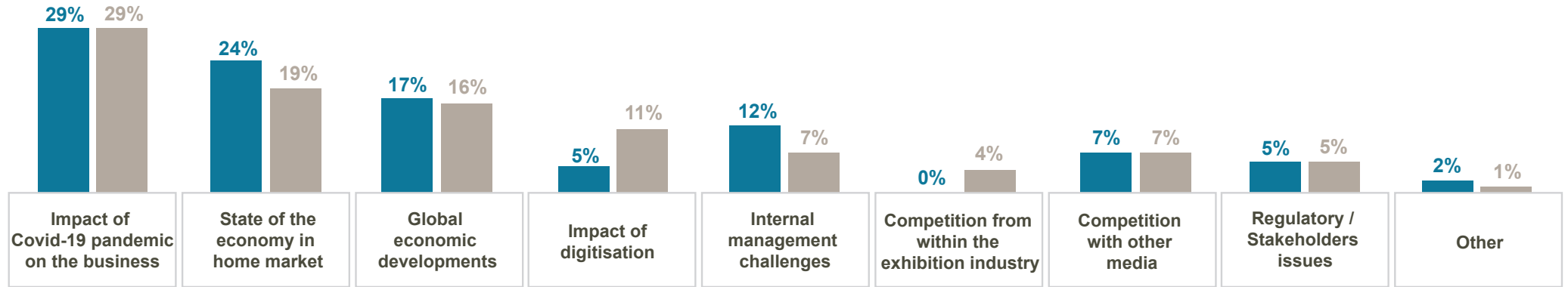
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for Brazil



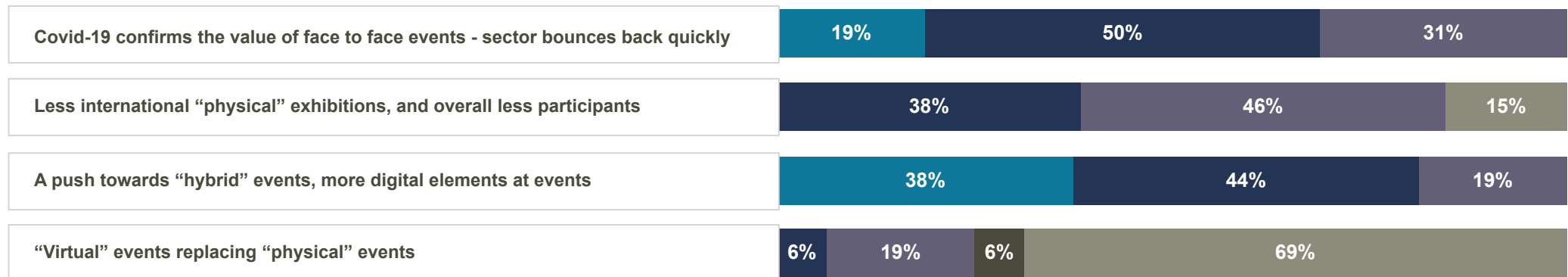
## Most important business issues in the exhibition industry

**Brazil** Global



## Format of exhibitions in the coming years

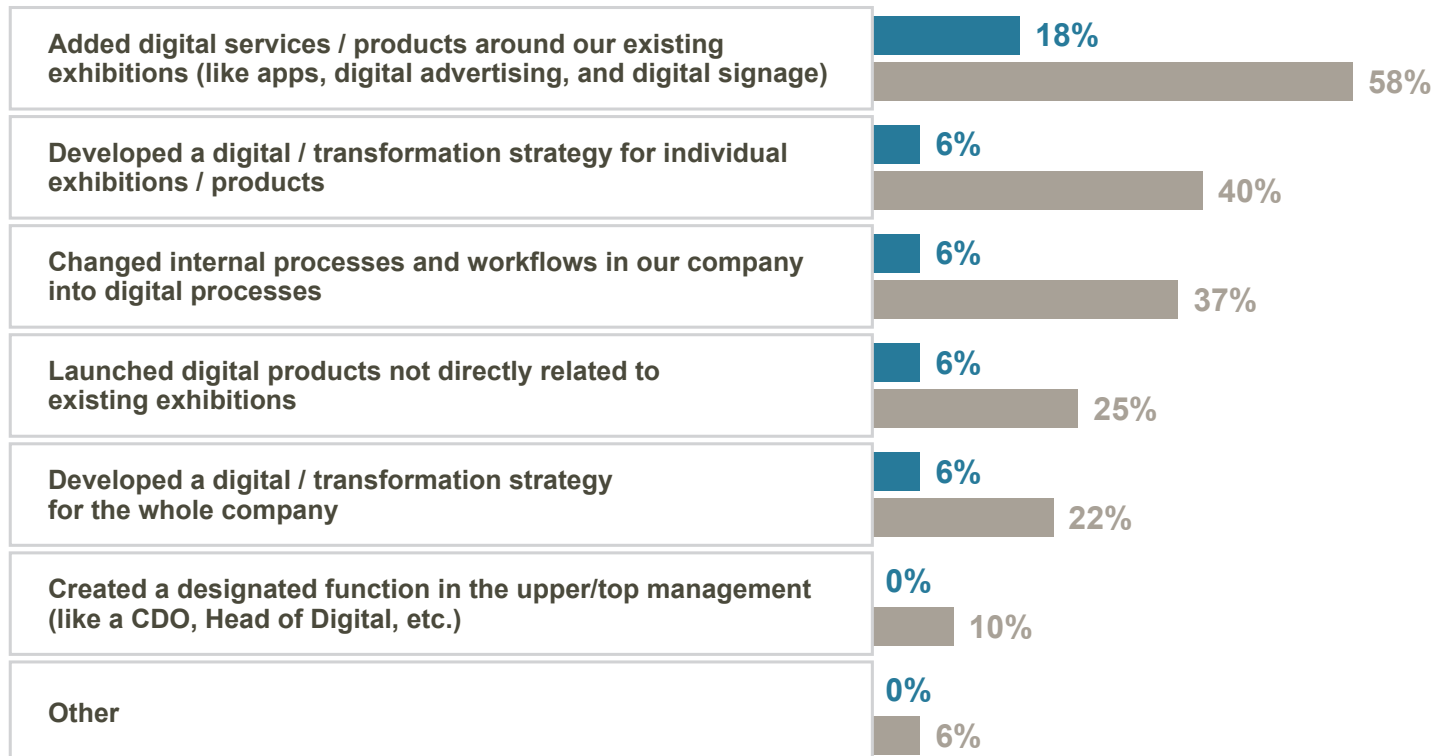
Yes, for sure Most probably Not sure Not sure at all Definitely not





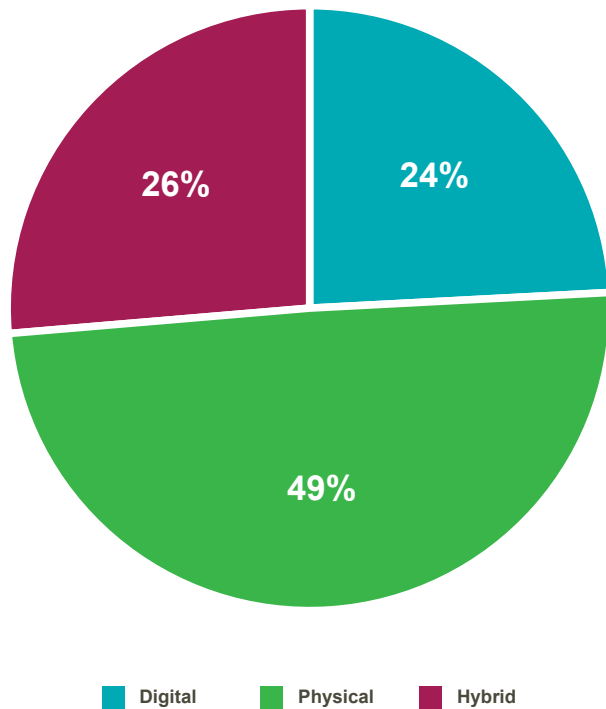
**Brazil** Global

## Digitisation: implementation in Brazil and globally

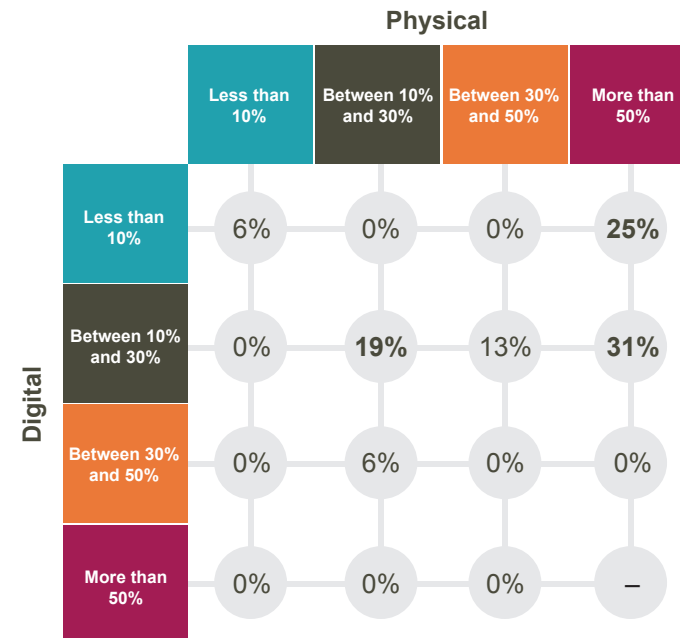


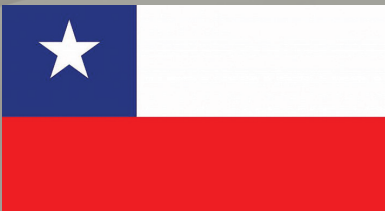


Number of fairs projected in 2021

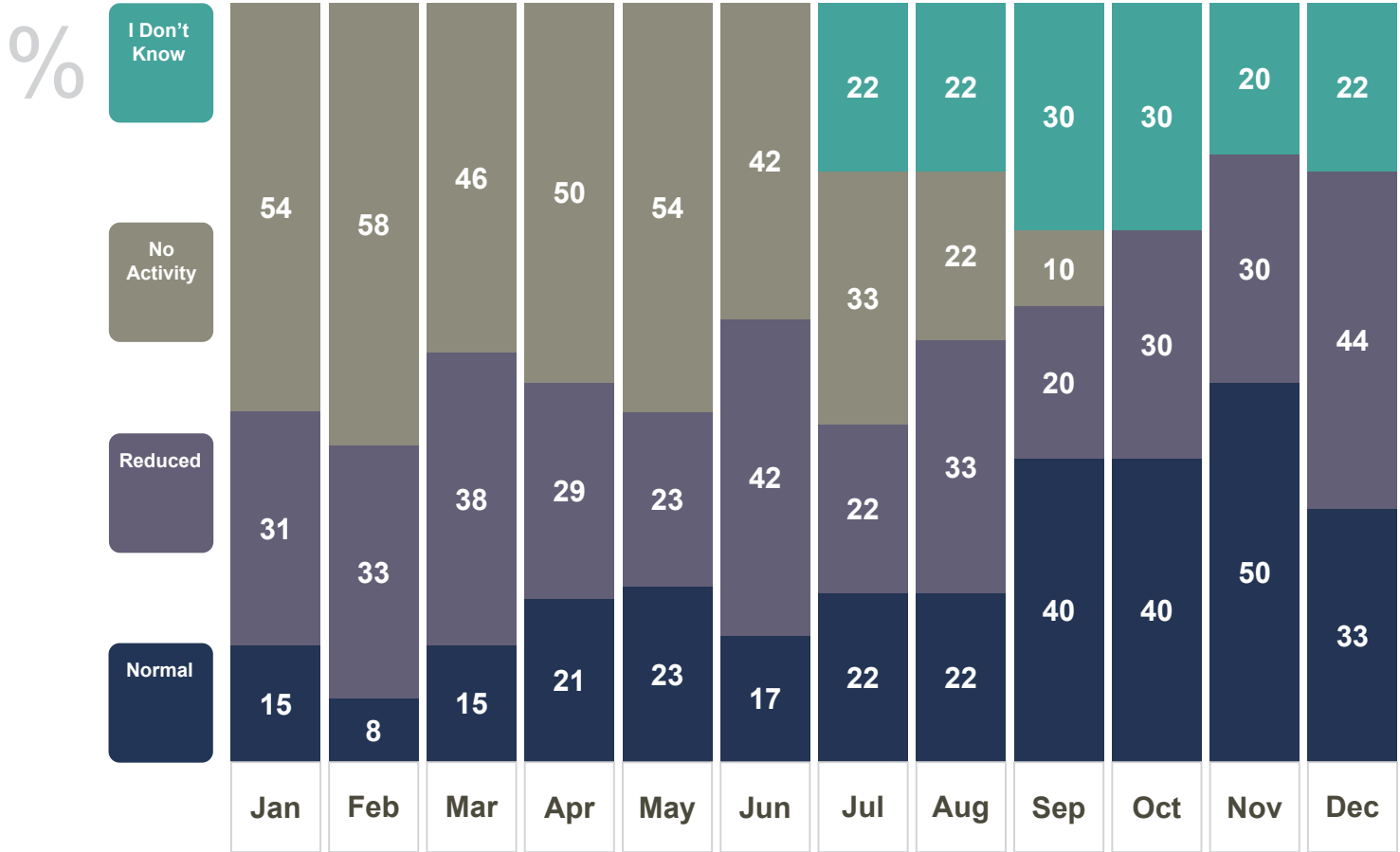


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

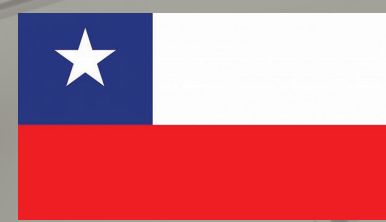




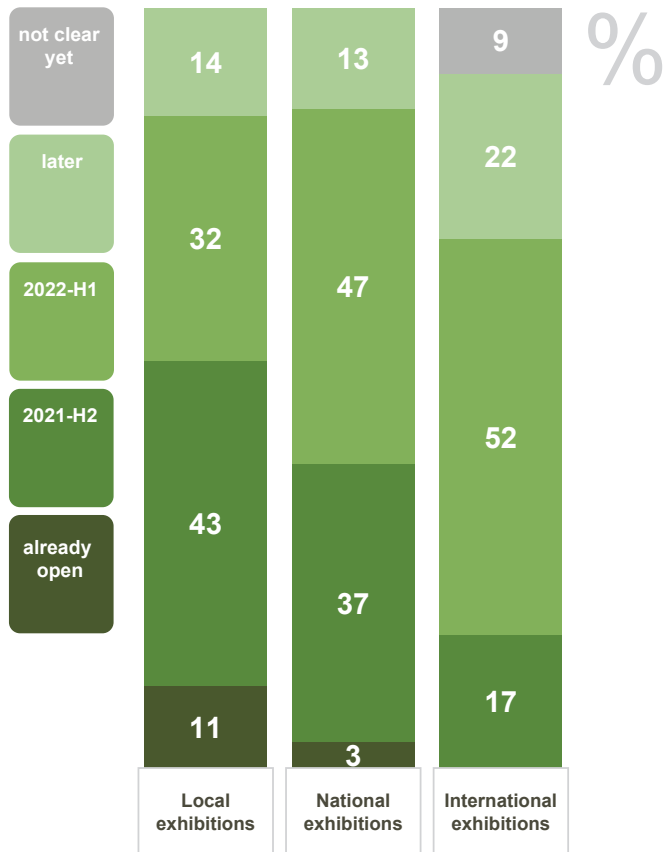
## Situation of industry operations in 2021



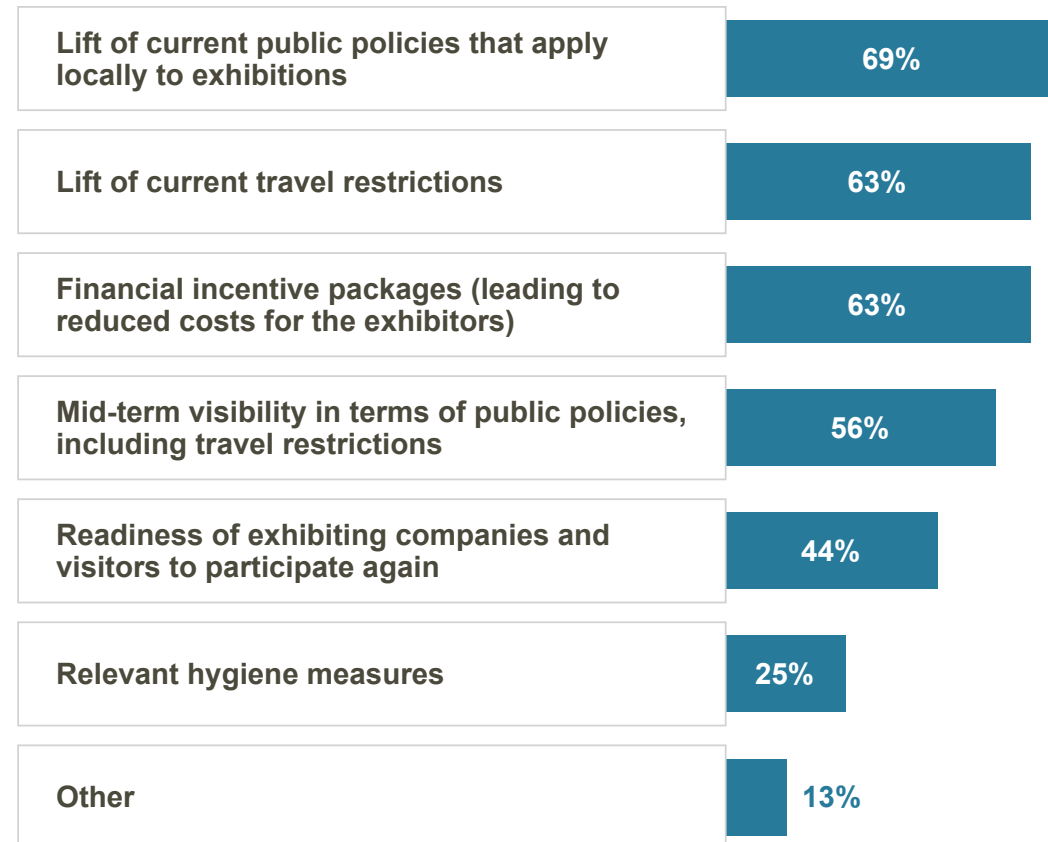


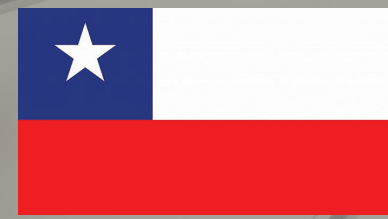


## When do you believe exhibitions will open again in your city?

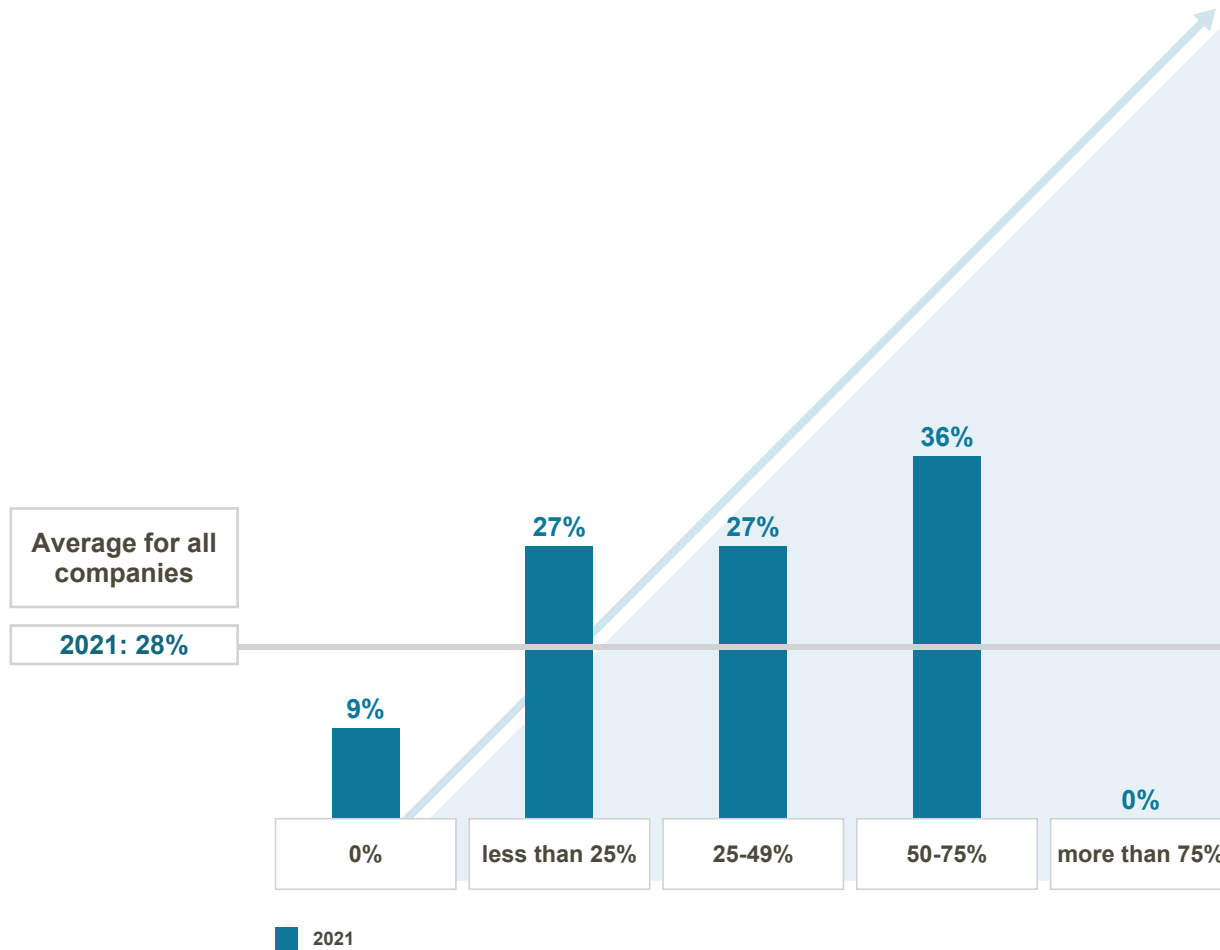


## What do you believe would most help the “bounce back” of exhibitions?

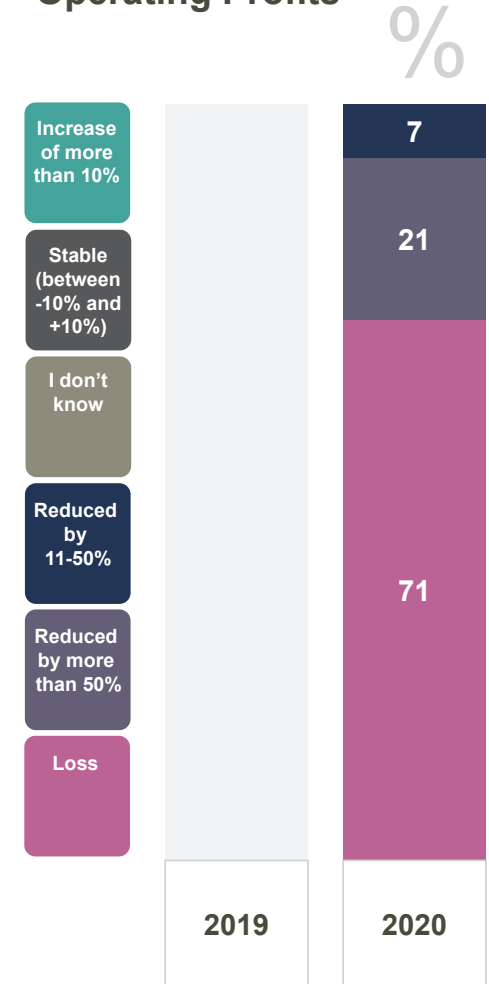


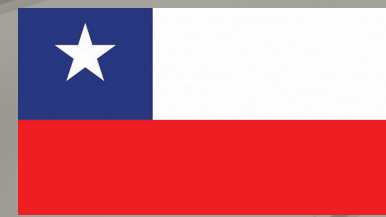


## Revenue compared to 2019

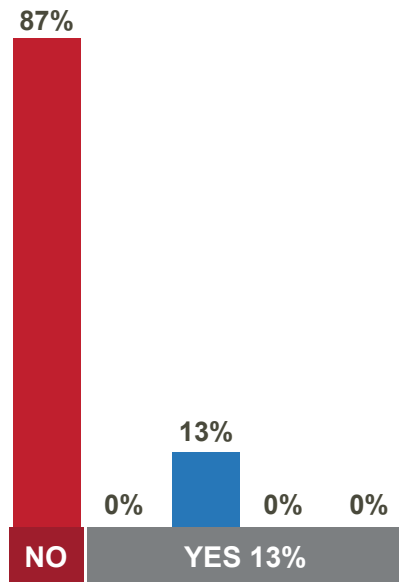


## Operating Profits

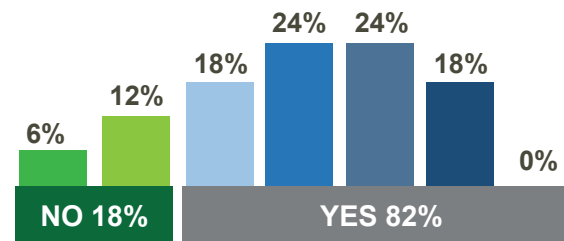




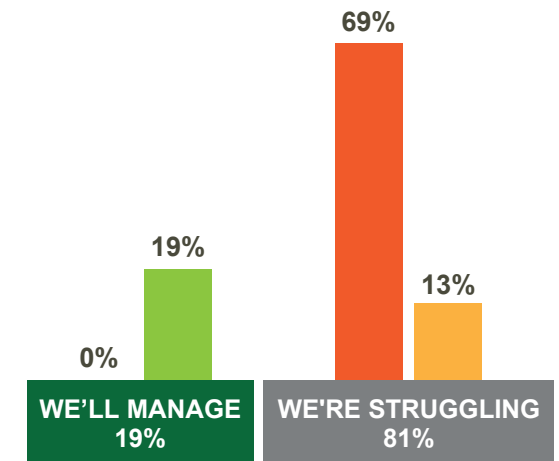
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



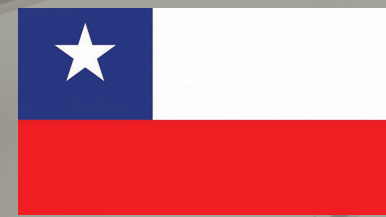
## If there is no business for the next 6 months, which best applies?



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

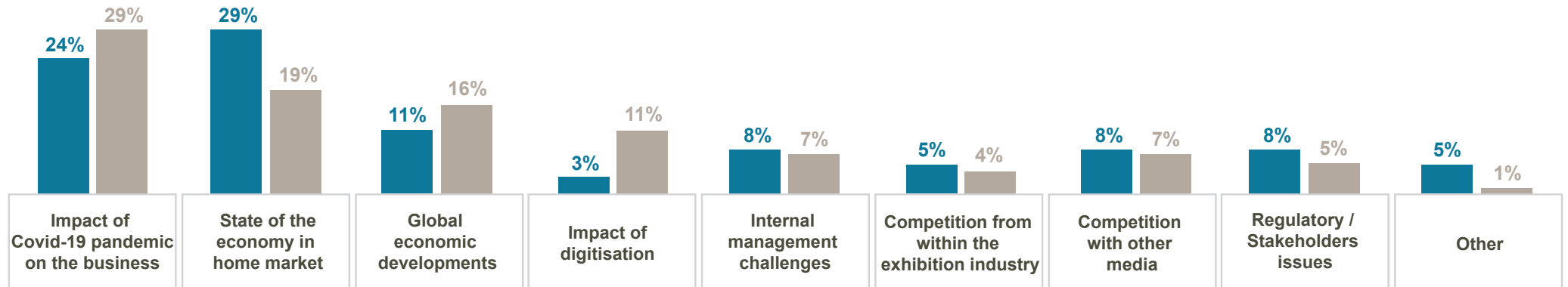
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



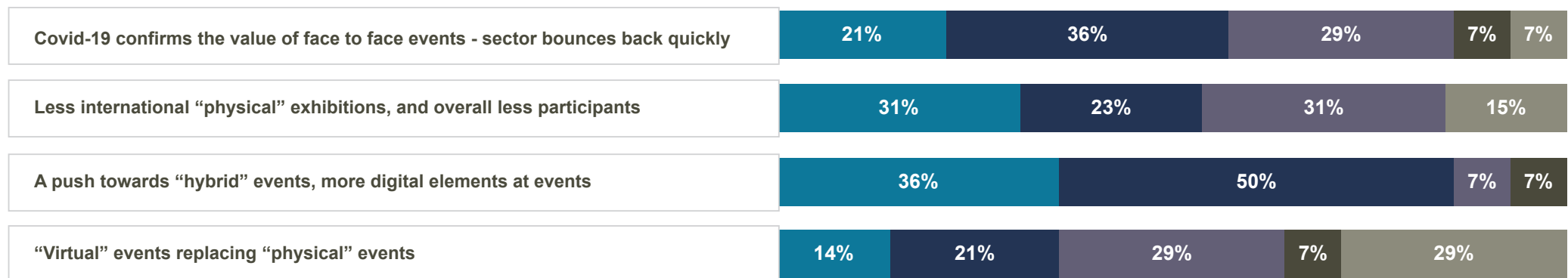
## Most important business issues in the exhibition industry

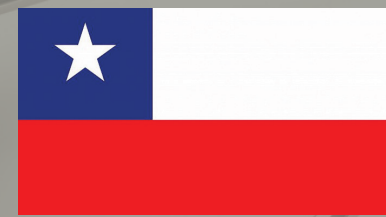
Chile Global



## Format of exhibitions in the coming years

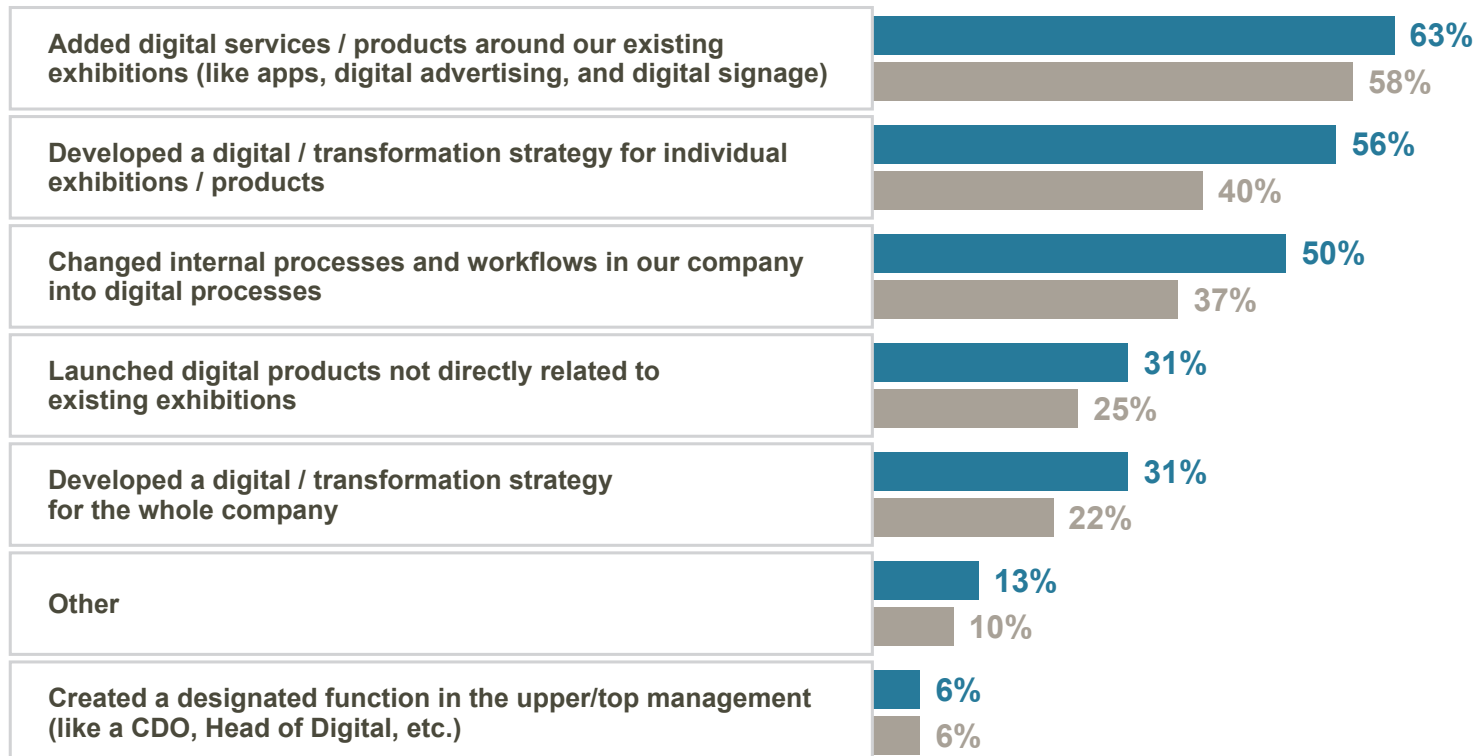
Yes, for sure Most probably Not sure Not sure at all Definitely not

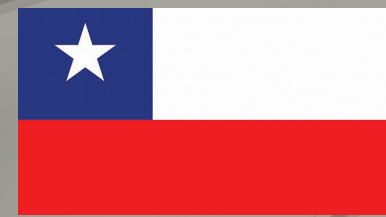




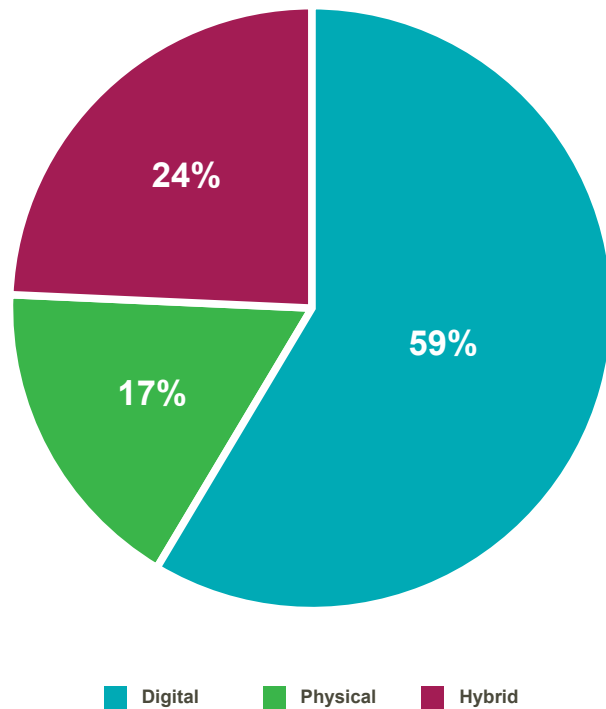
Chile Global

## Digitisation: implementation in Chile and globally

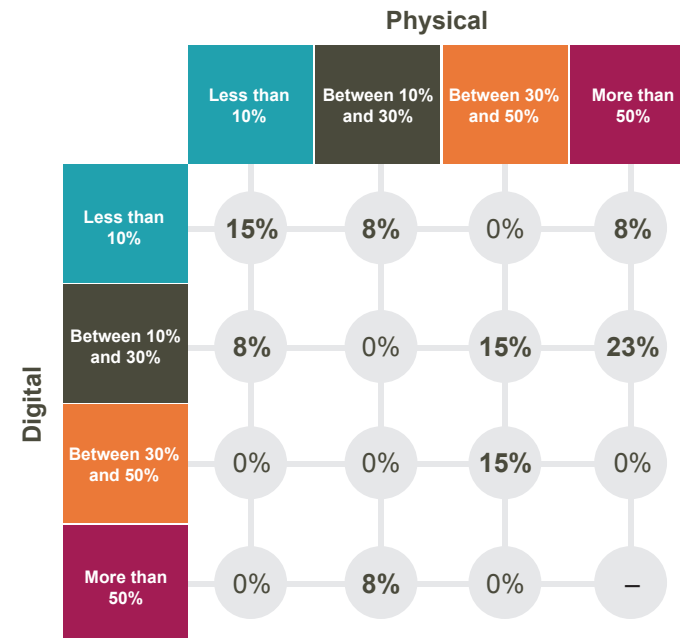




Number of fairs projected in 2021

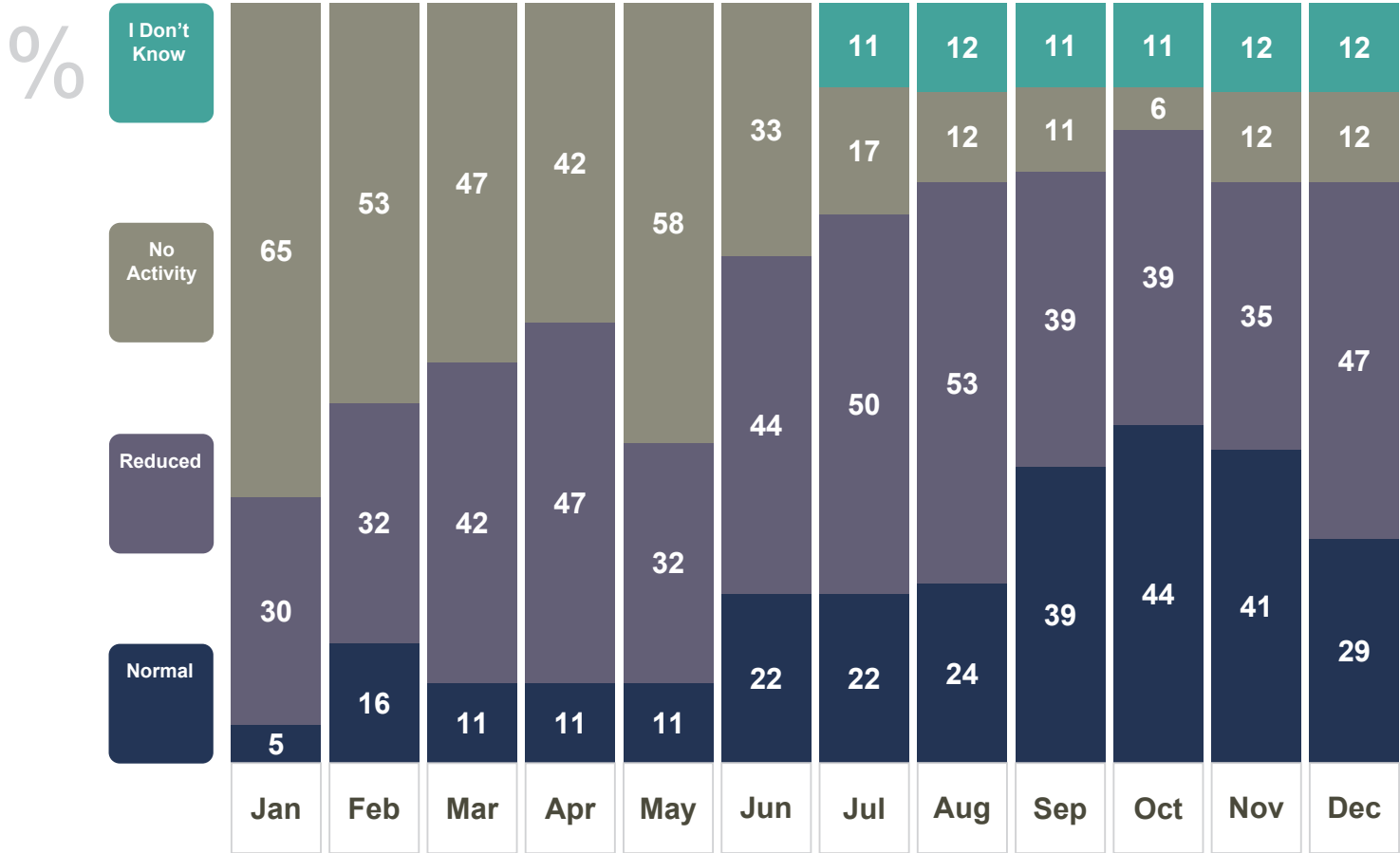


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



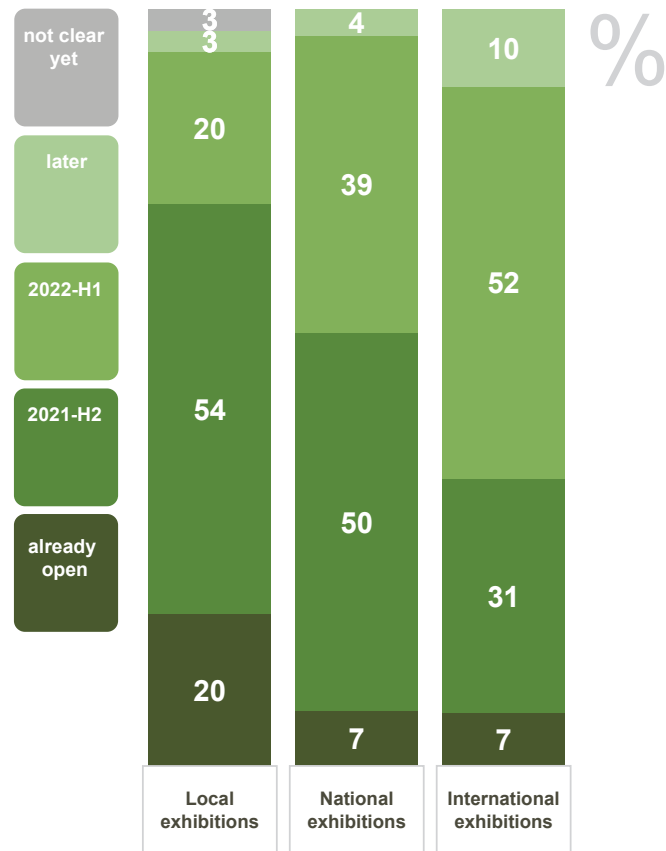


## Situation of industry operations in 2021

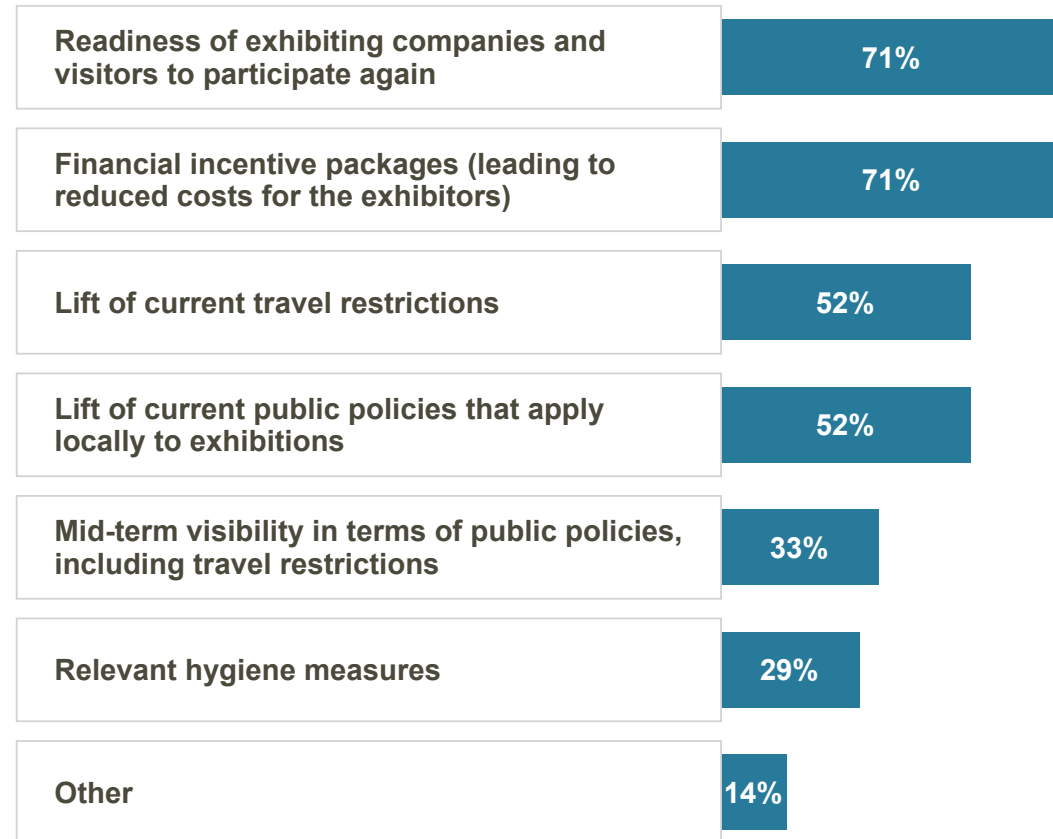




## When do you believe exhibitions will open again in your city?



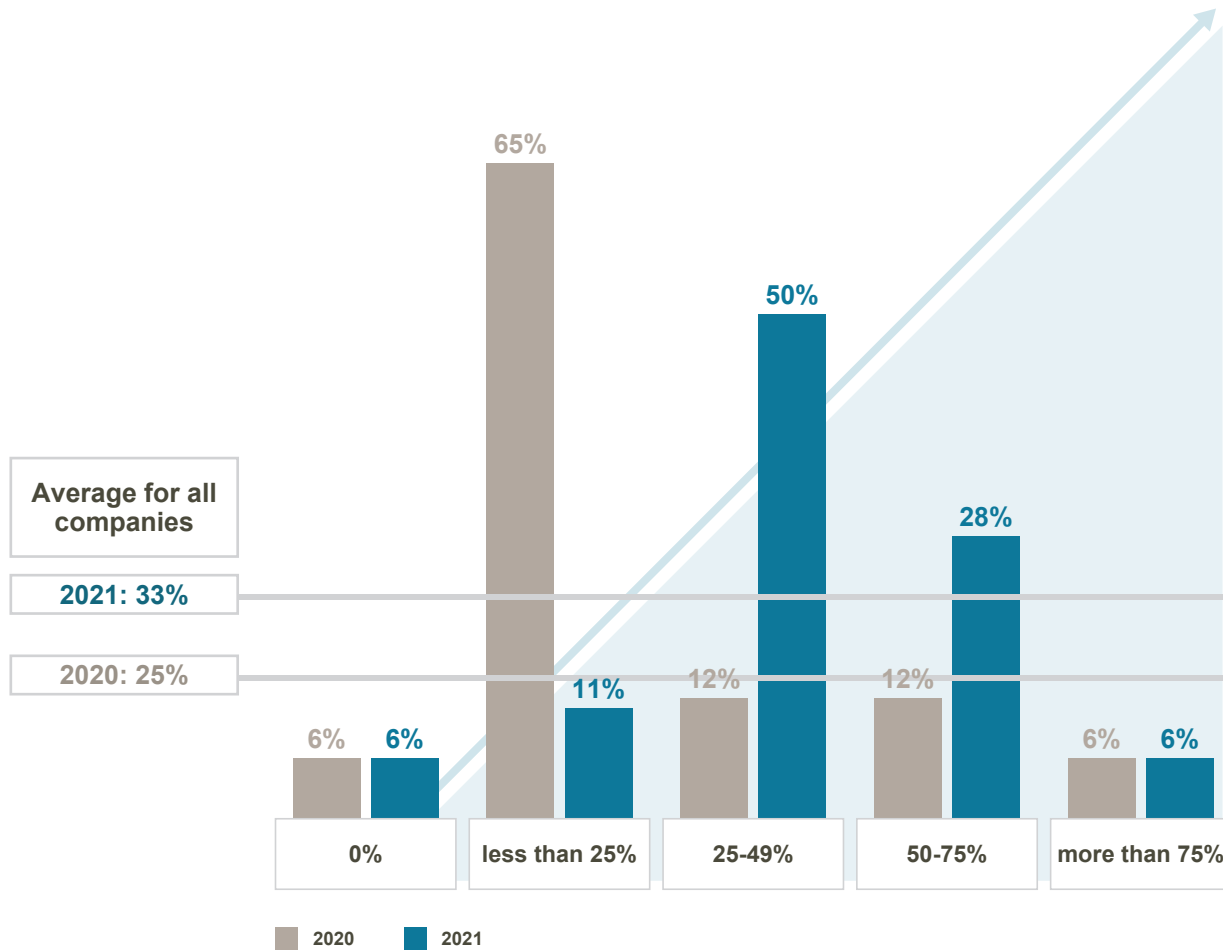
## What do you believe would most help the “bounce back” of exhibitions?



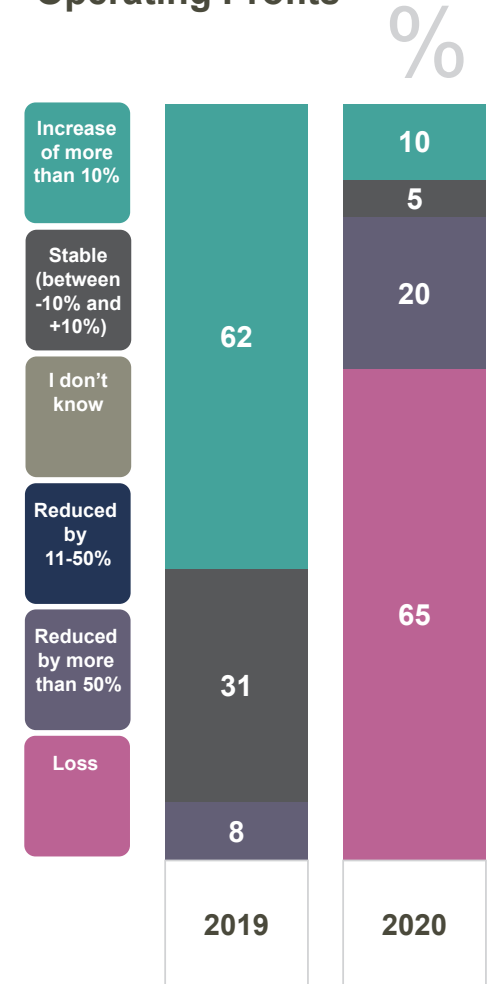




## Revenue compared to 2019

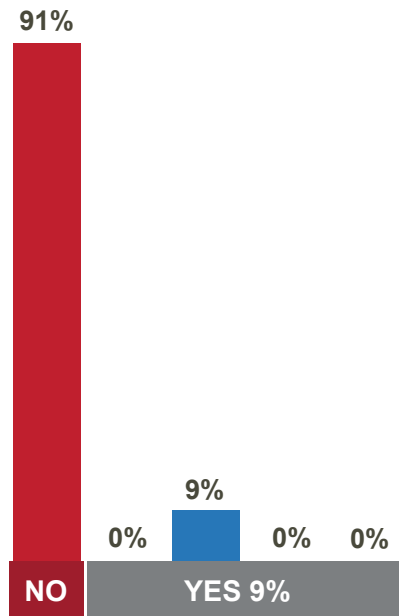


## Operating Profits

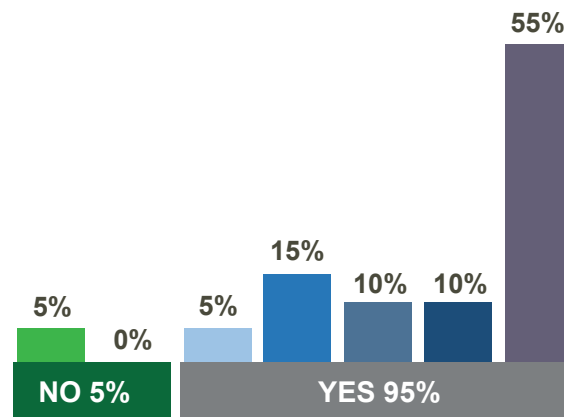




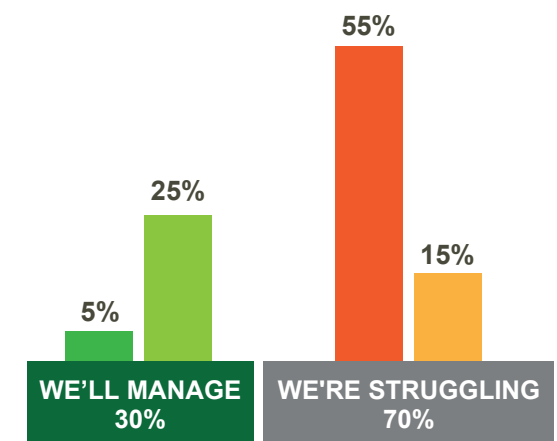
## Did your company benefit from public financial support?



## 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%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

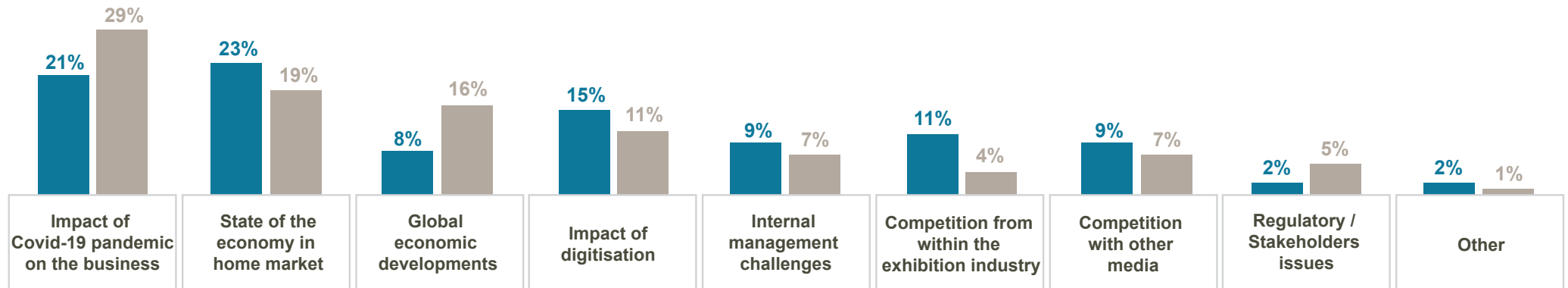
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down



## Most important business issues in the exhibition industry

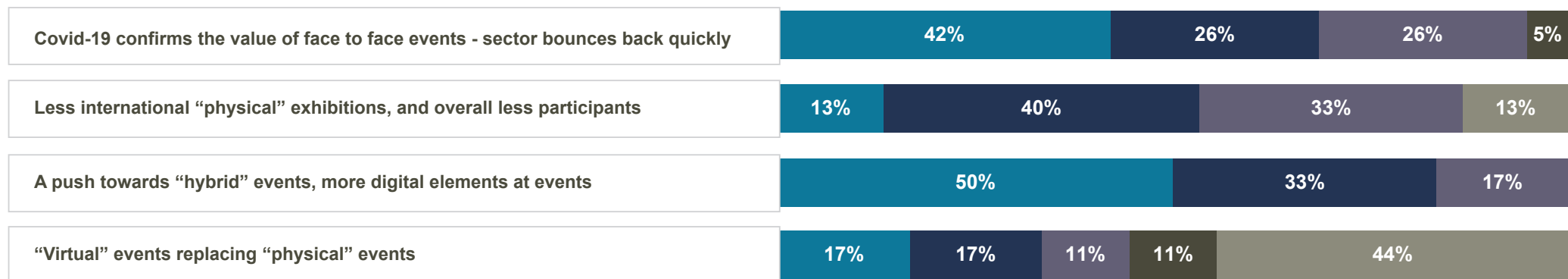
Colombia

Global



## Format of exhibitions in the coming years

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

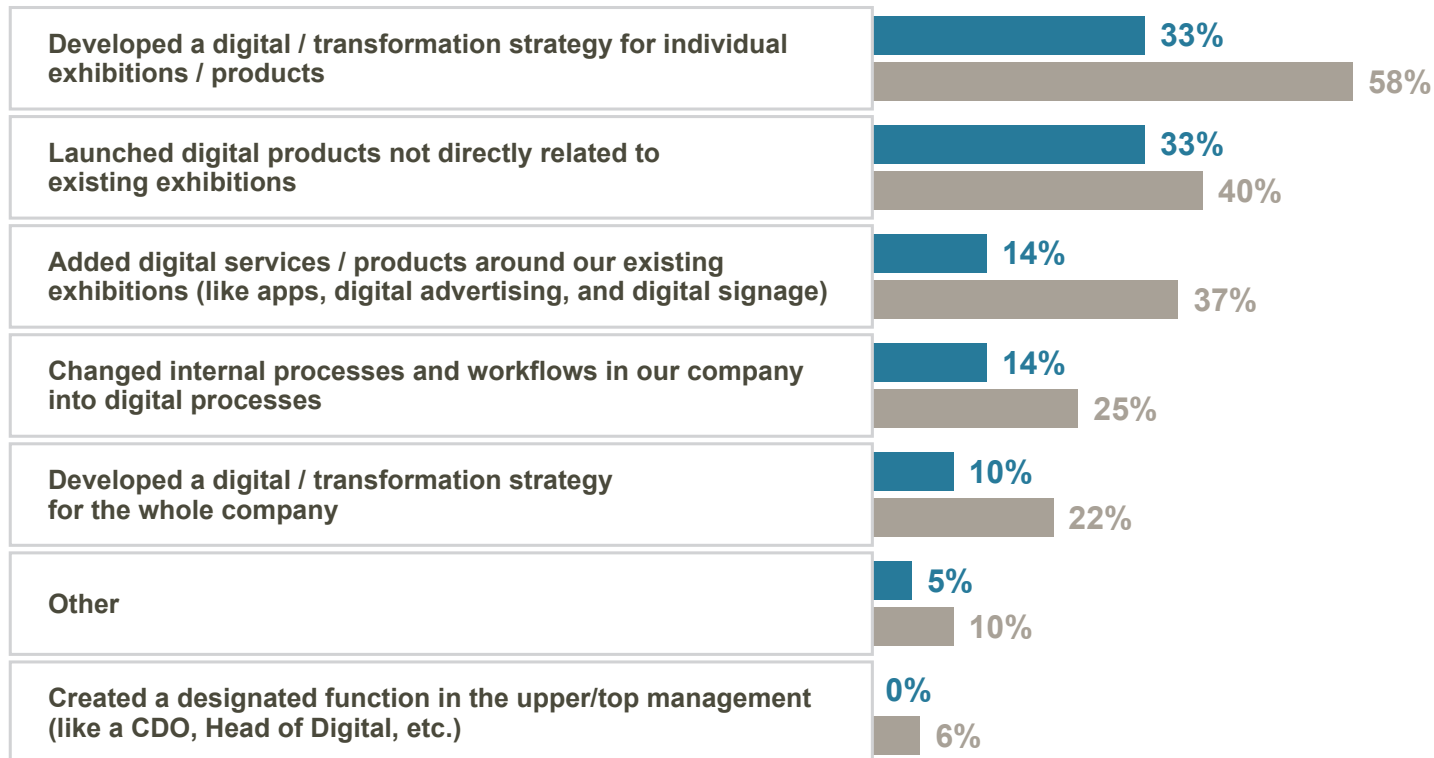




Colombia

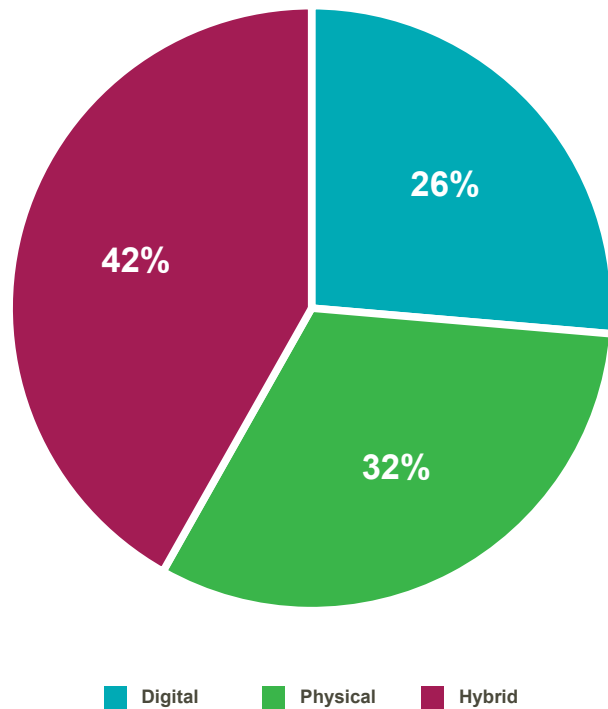
Global

## Digitisation: implementation in Colombia and globally

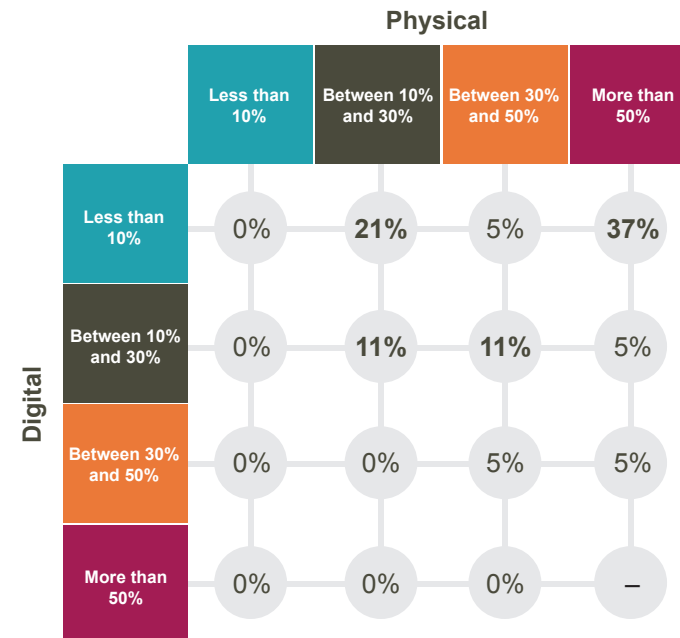




Number of fairs projected in 2021

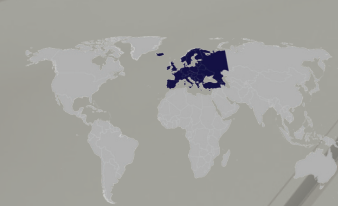


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



A network of interconnected nodes and lines, resembling a molecular structure or a data network, set against a teal background. The nodes are circular and connected by thin lines, forming a complex, branching structure that extends across the frame.

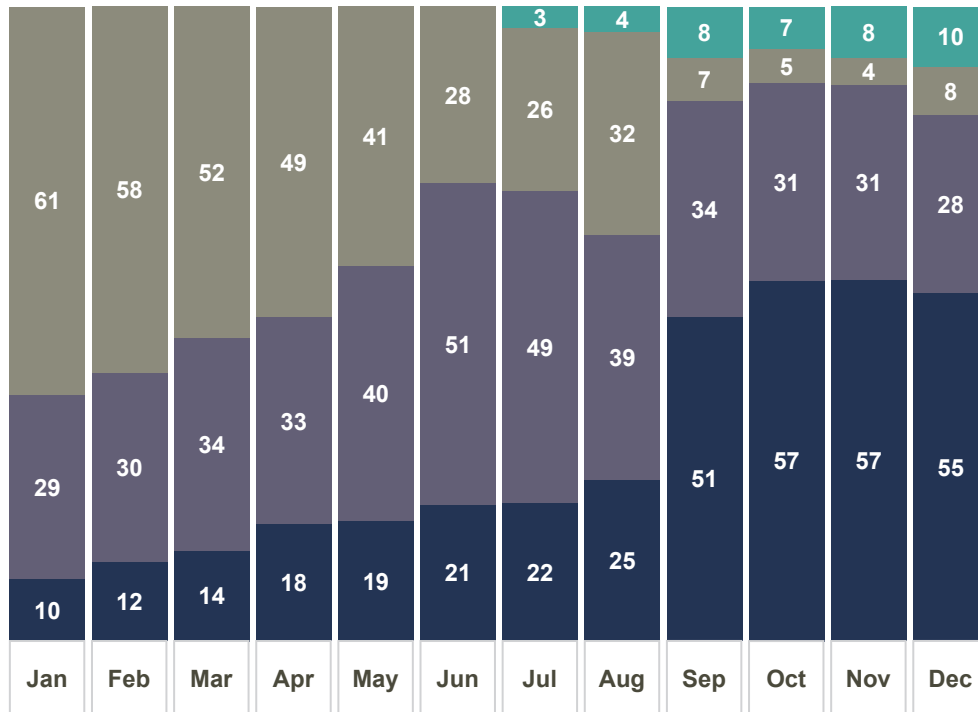
Europe



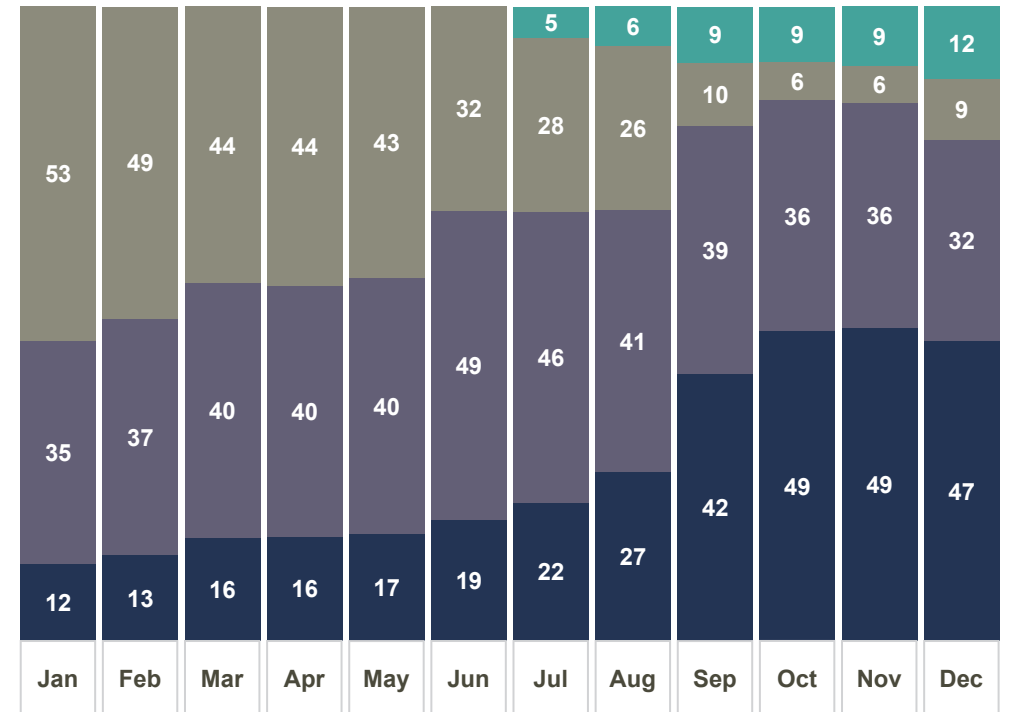
## Situation of industry operations in 2021



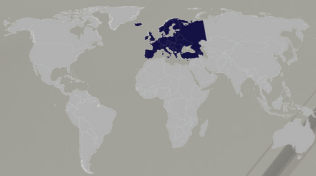
### Europe



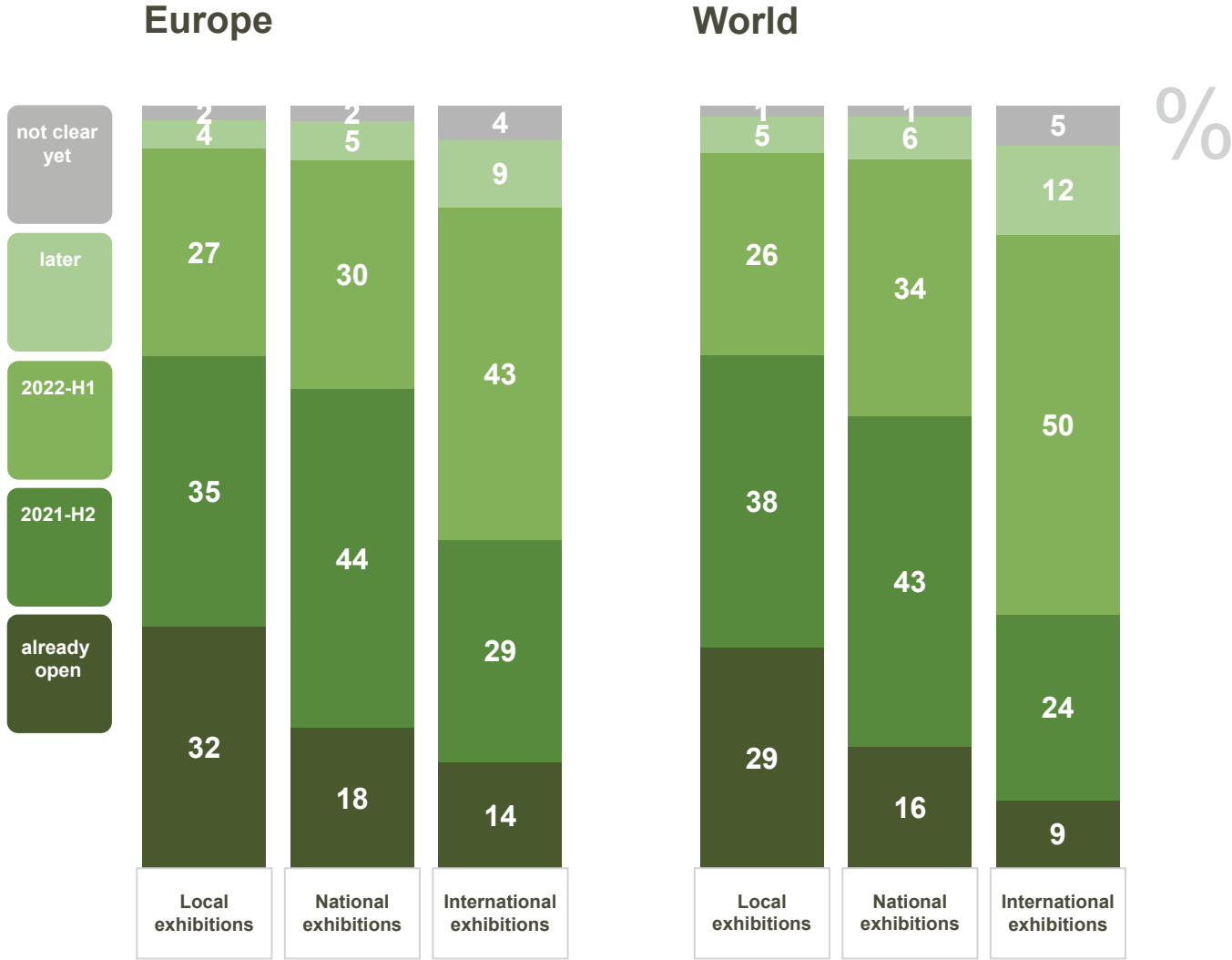
### World



# Operations - Reopening Exhibitions Europe



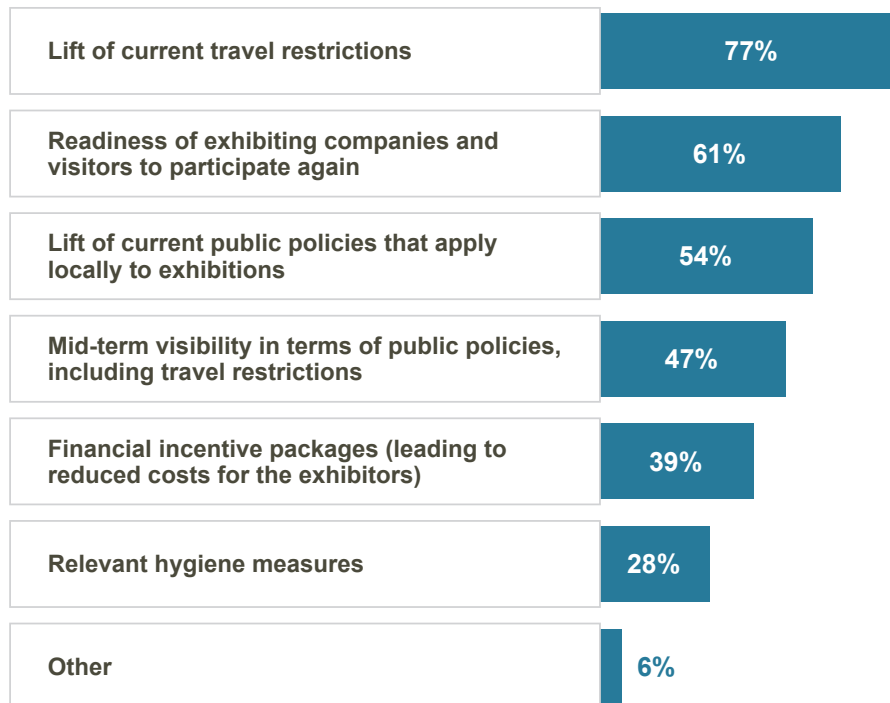
When do you believe exhibitions will open again in your city?



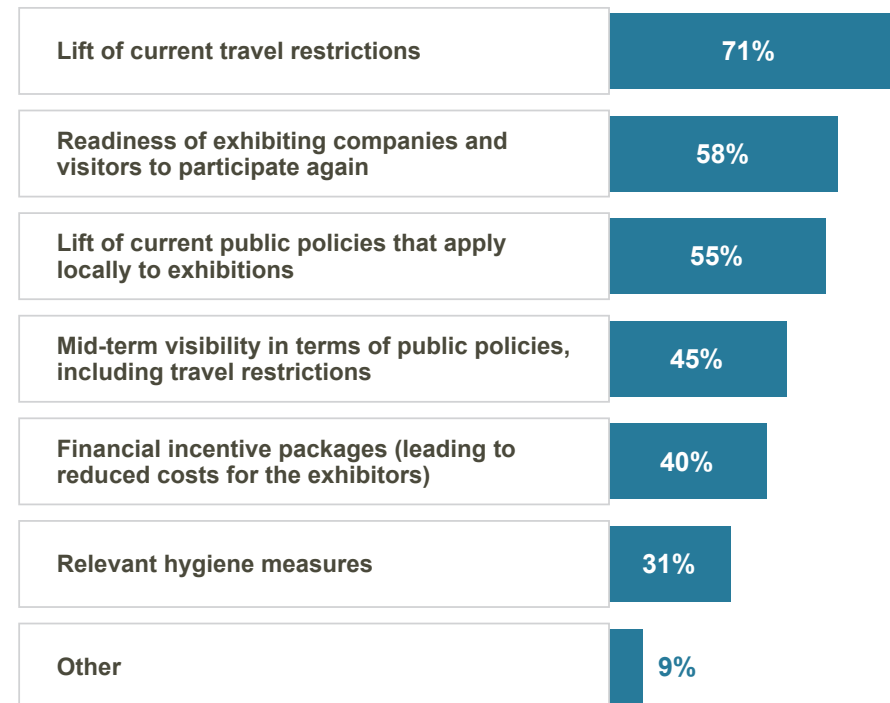


## What do you believe would most help the “bounce back” of exhibitions?

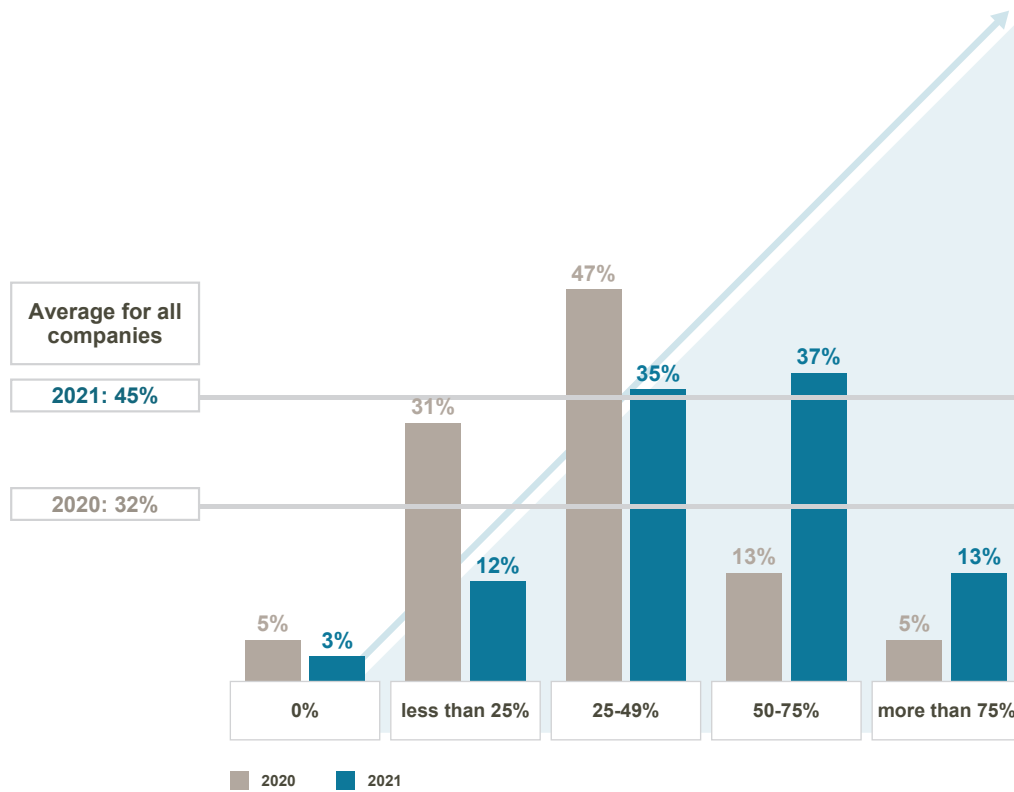
### Europe



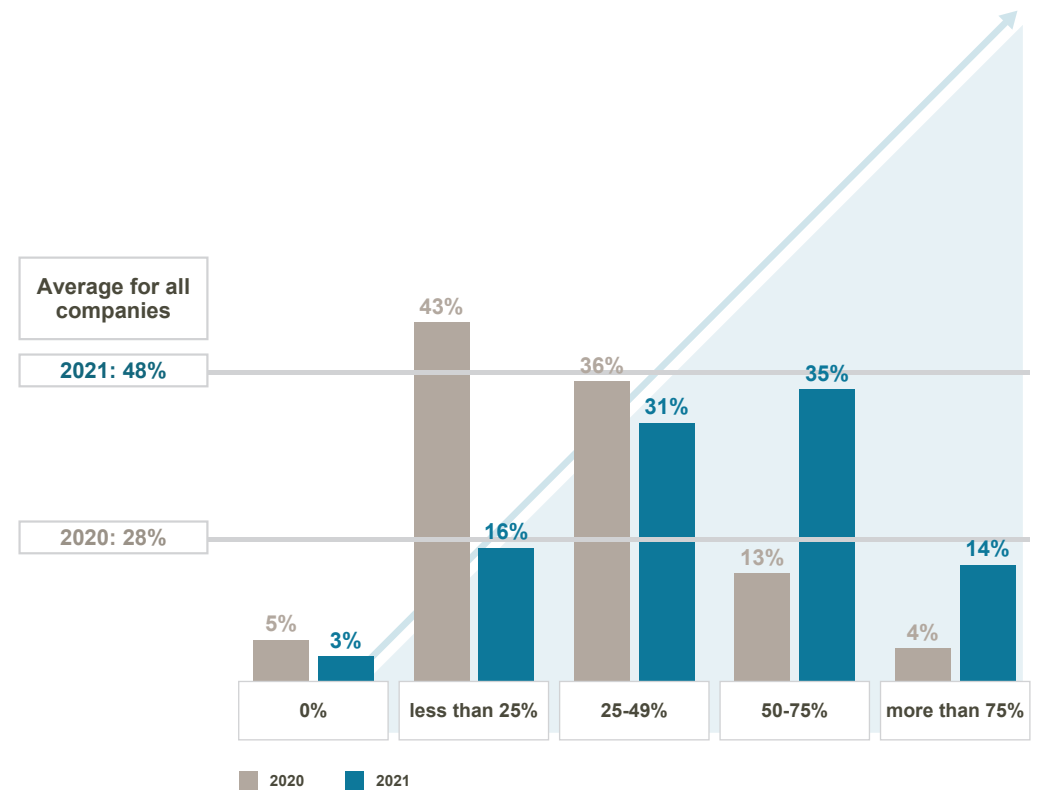
### World



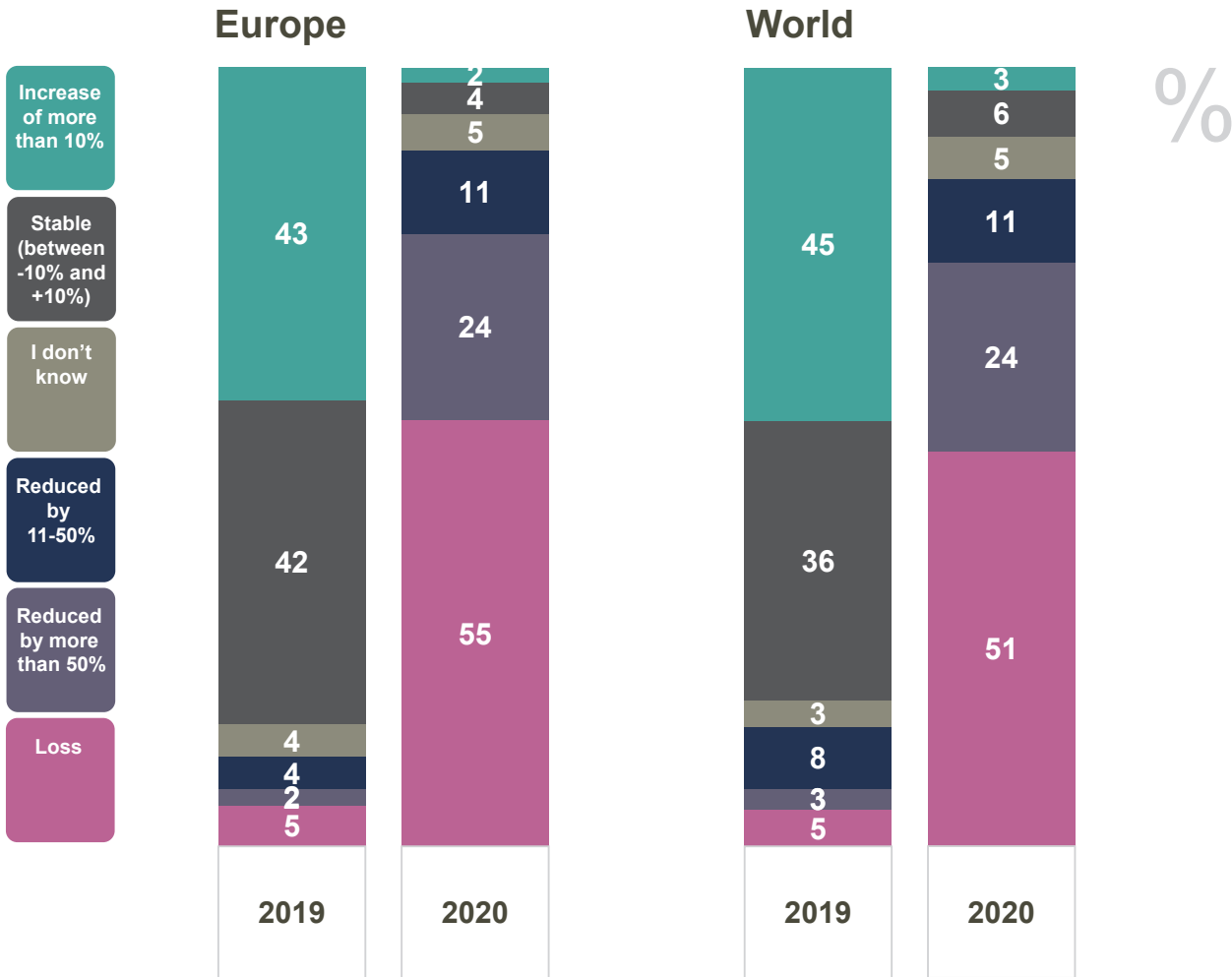
## Revenue compared to 2019 Europe



## World



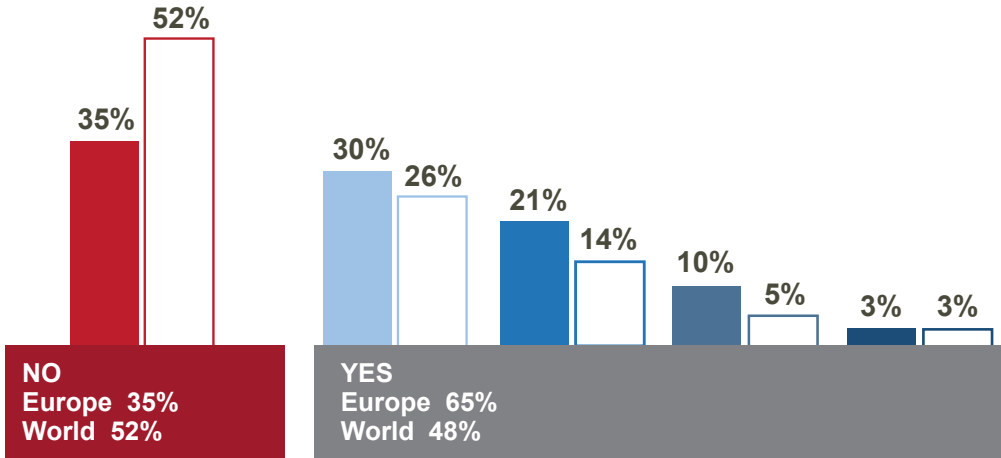
# Operating profits Europe



## Did your company benefit from public financial support?

Europe World

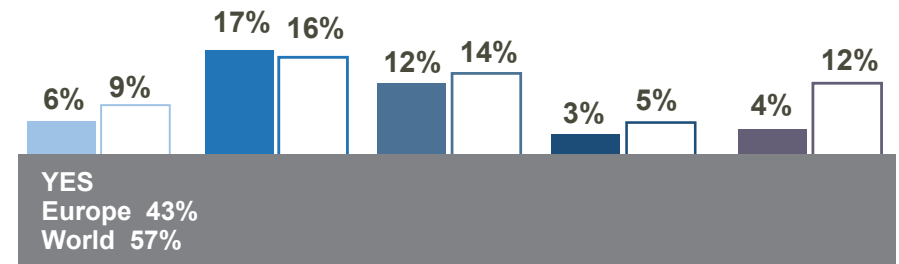
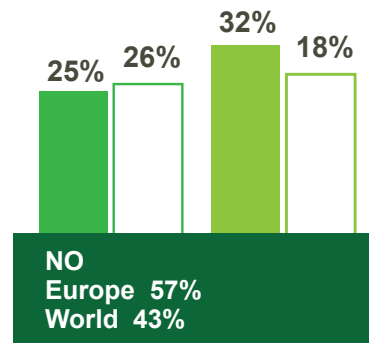
- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs



## Have you had to reduce your workforce?

Europe World

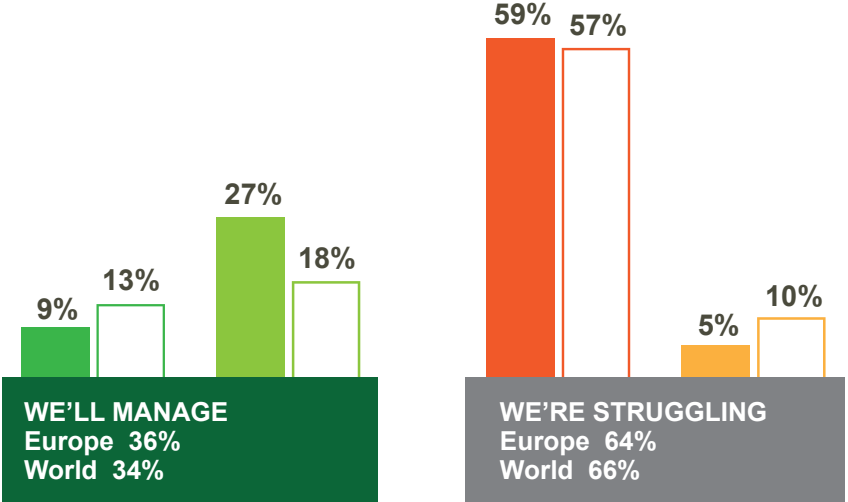
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum



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

Europe
  World

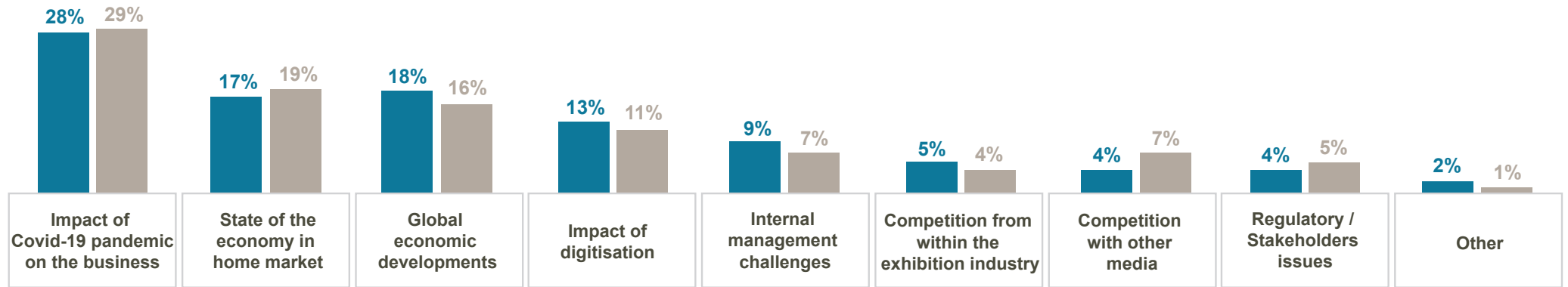
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down



# Most Important Business Issues - Format of Exhibitions - Europe

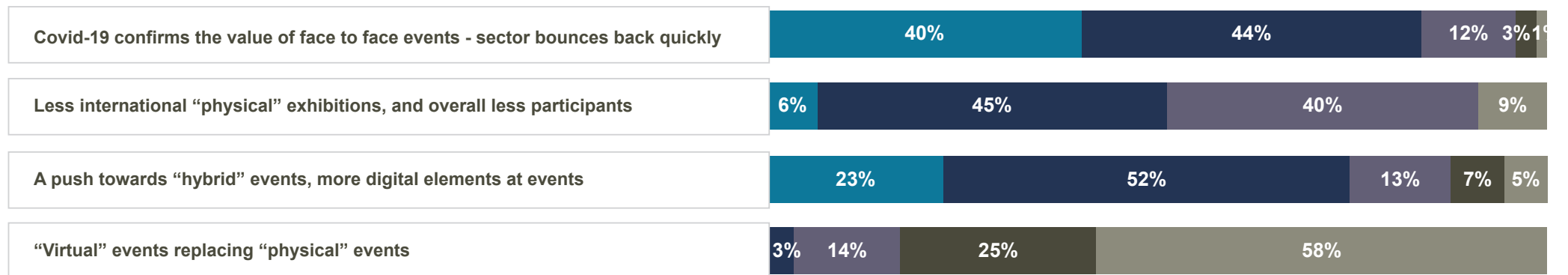
## Most important business issues in the exhibition industry

Europe Global



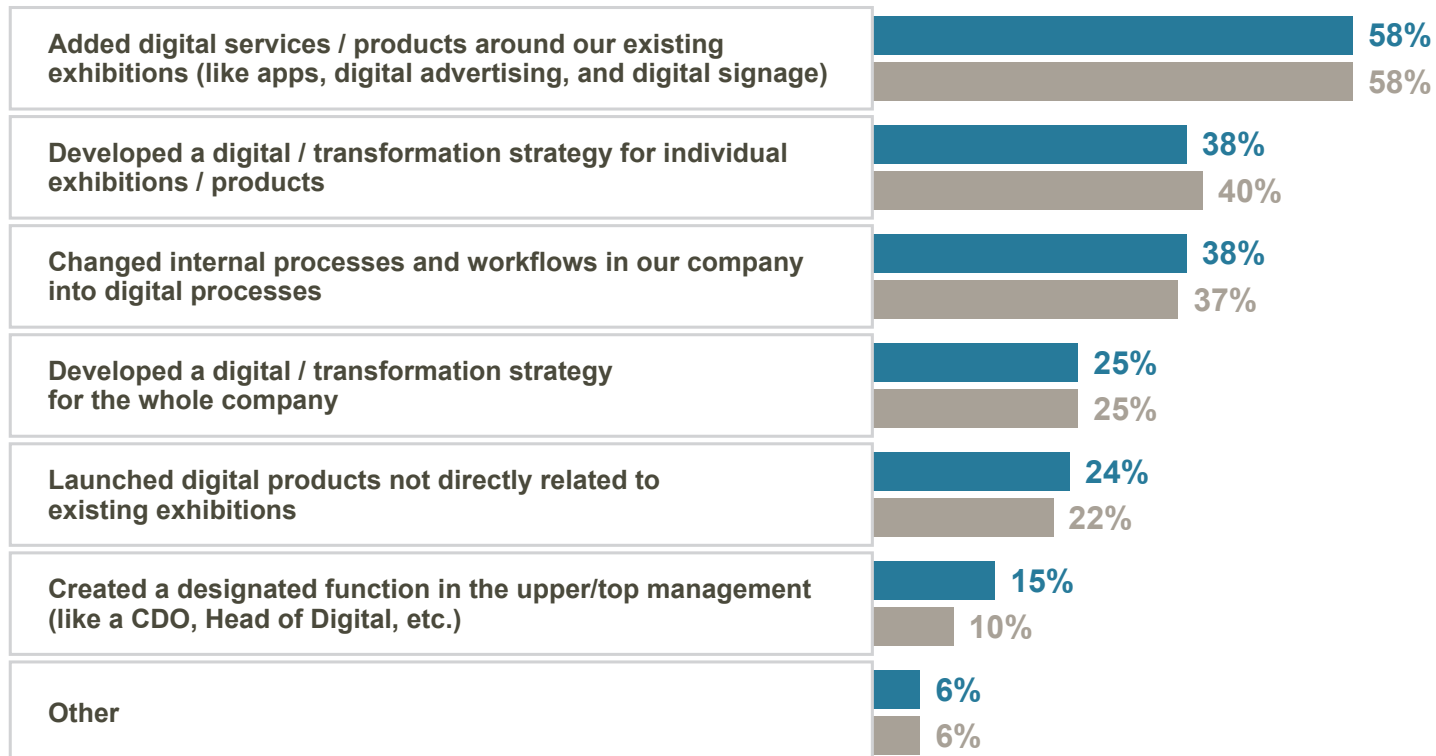
## Format of exhibitions in the coming years

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



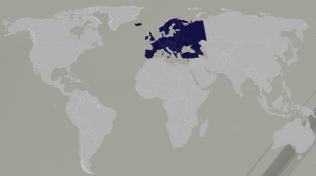
Europe Global

## Digitisation: implementation in Europe and globally

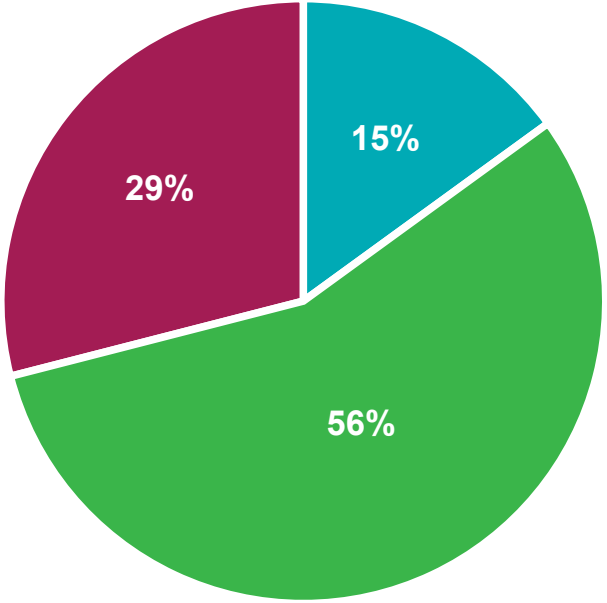




# Number of fairs projected in 2021 Europe

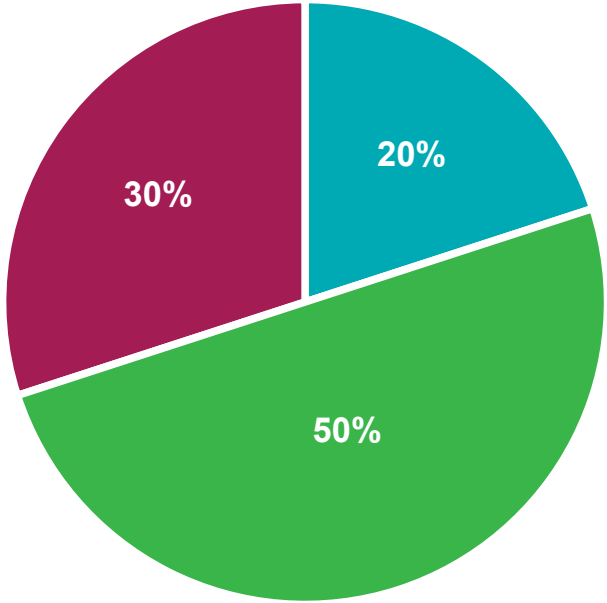


Europe



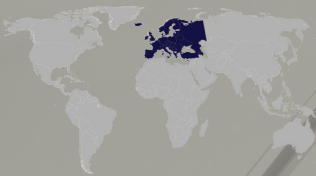
■ Digital ■ Physical ■ Hybrid

World

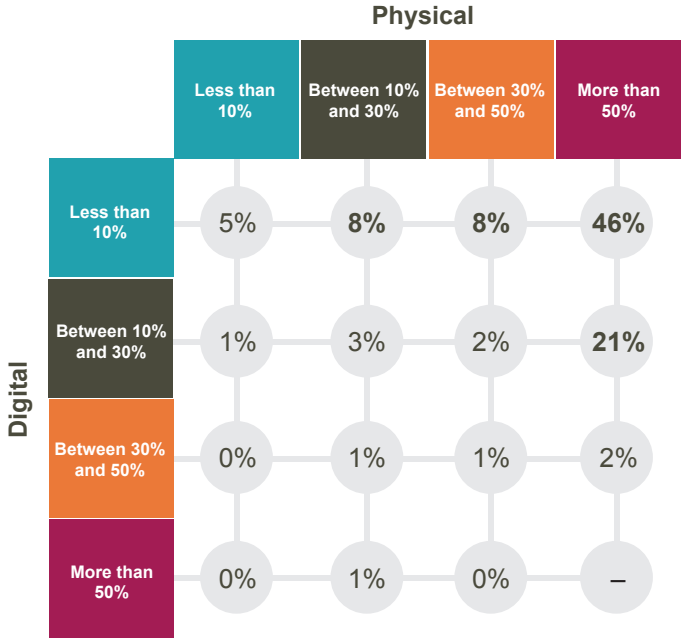


■ Digital ■ Physical ■ Hybrid

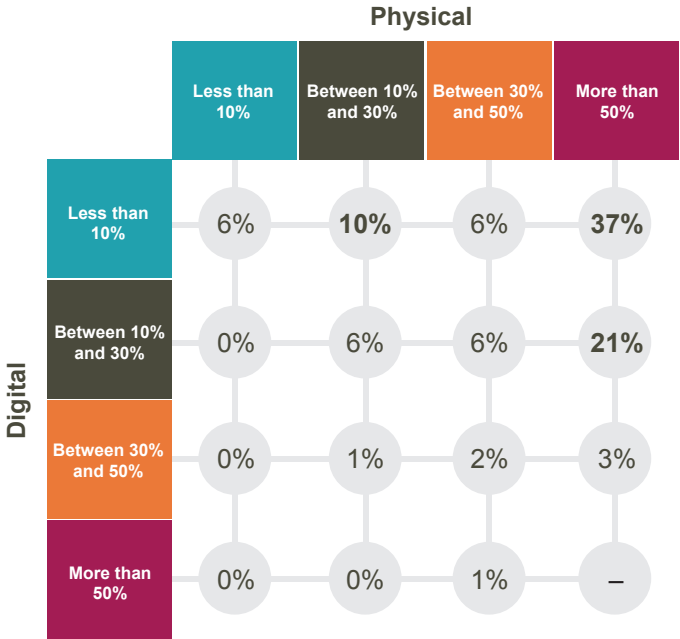
# Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



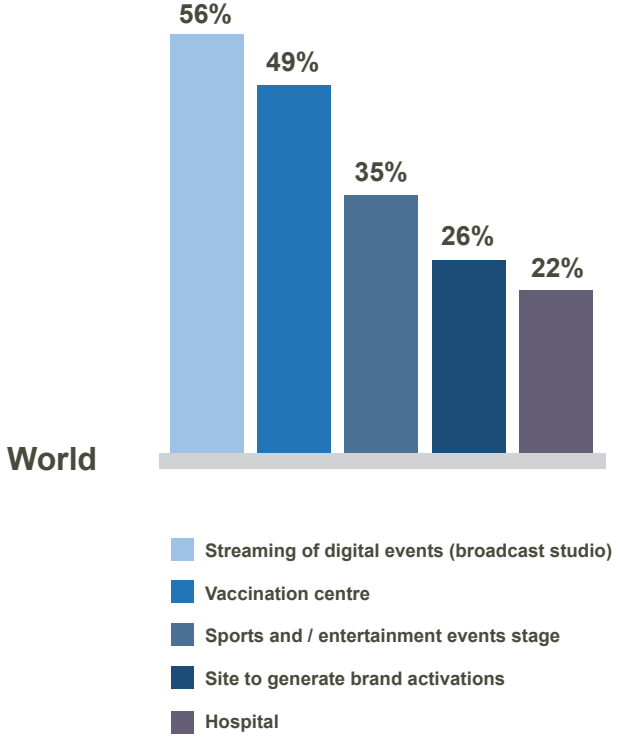
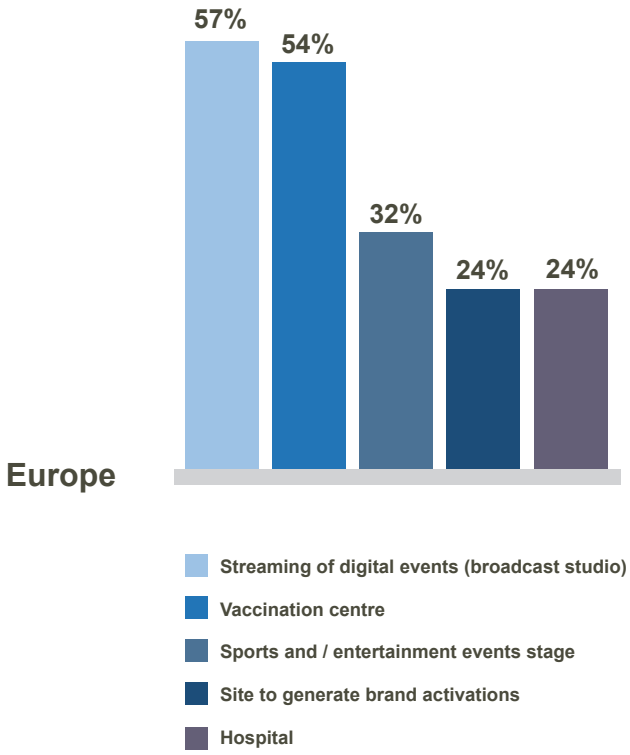
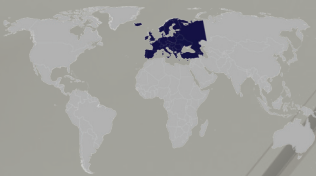
## Europe



## World

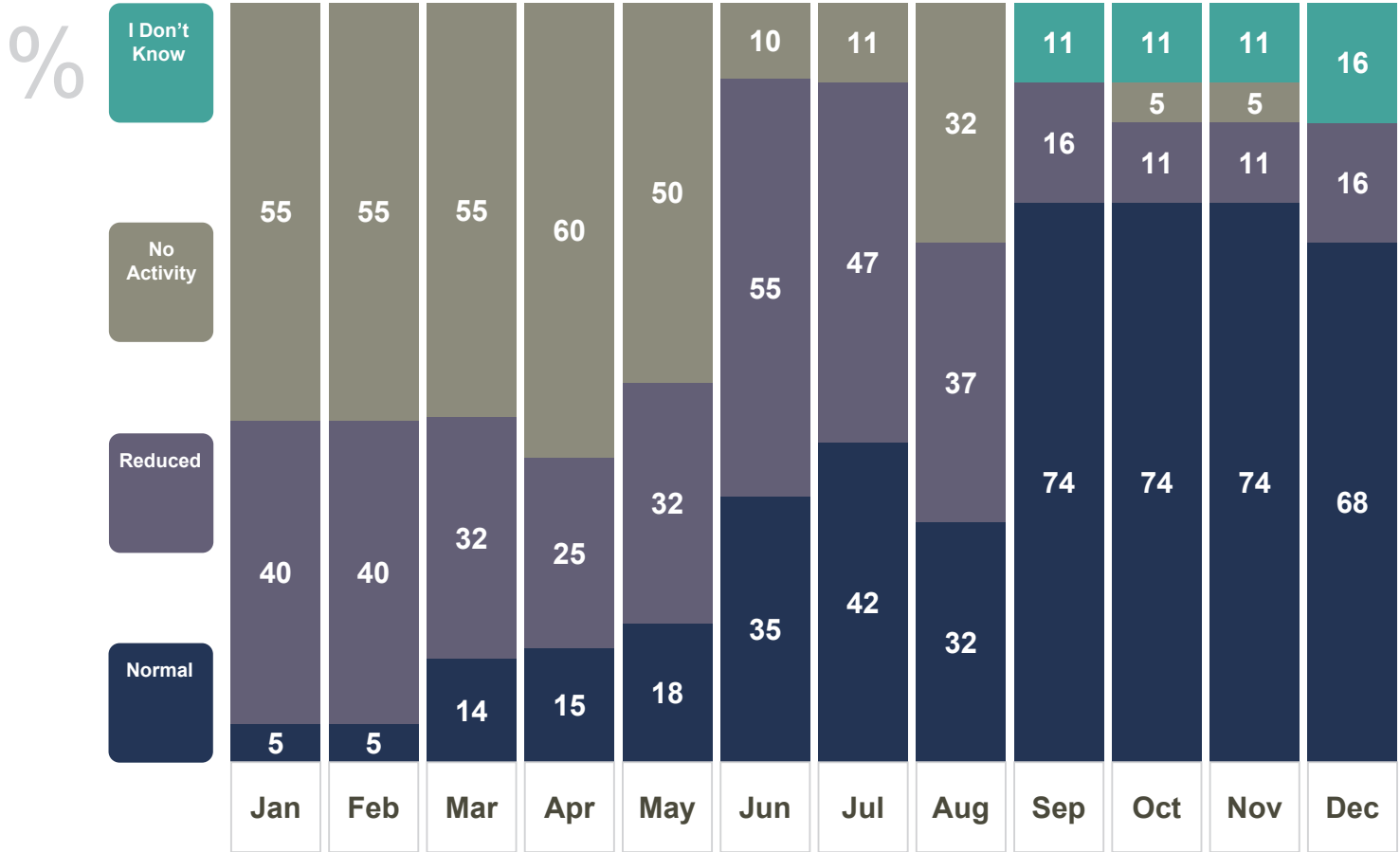


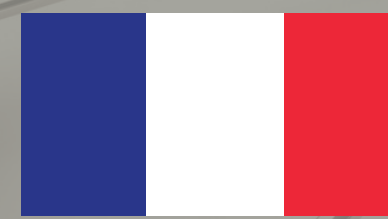
# Expanded activities (for venues only) Europe



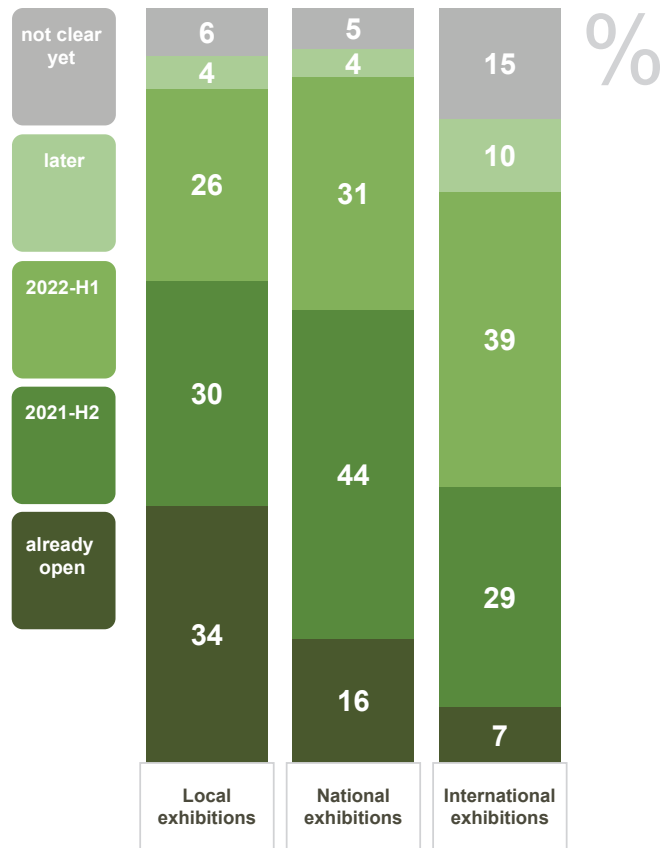


## Situation of industry operations in 2021

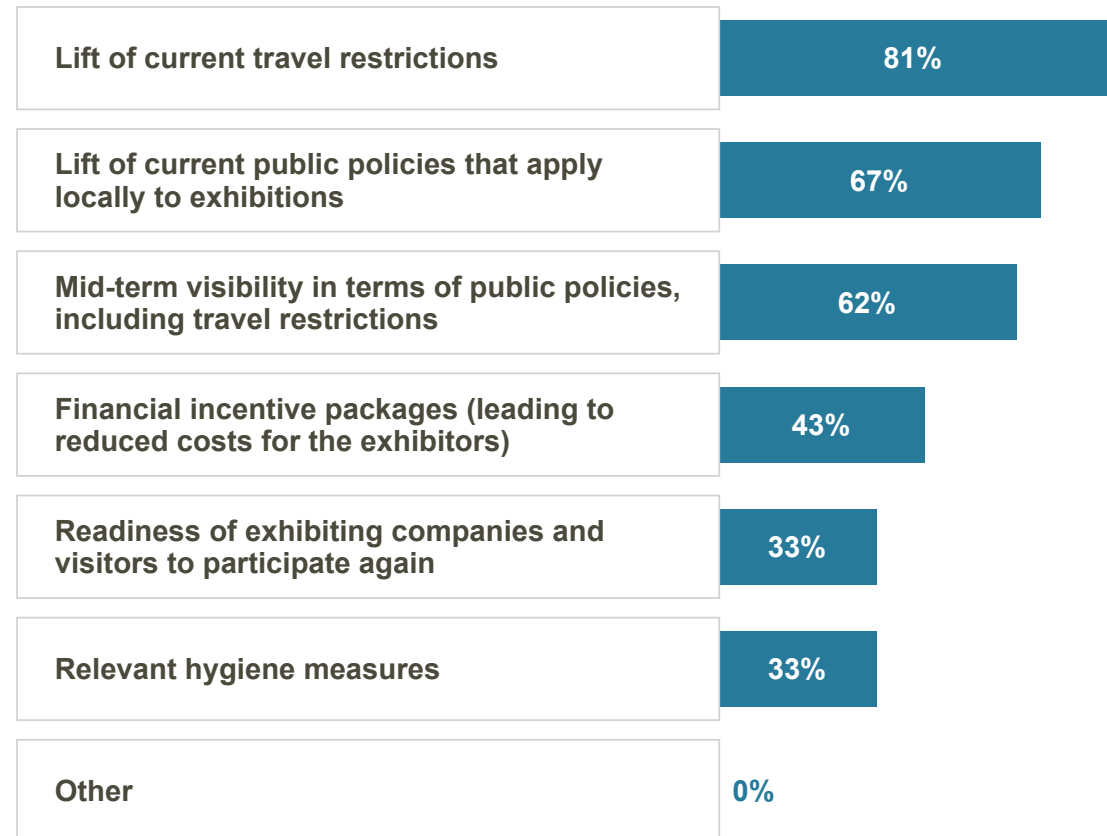


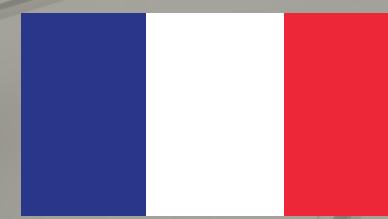


## When do you believe exhibitions will open again in your city?

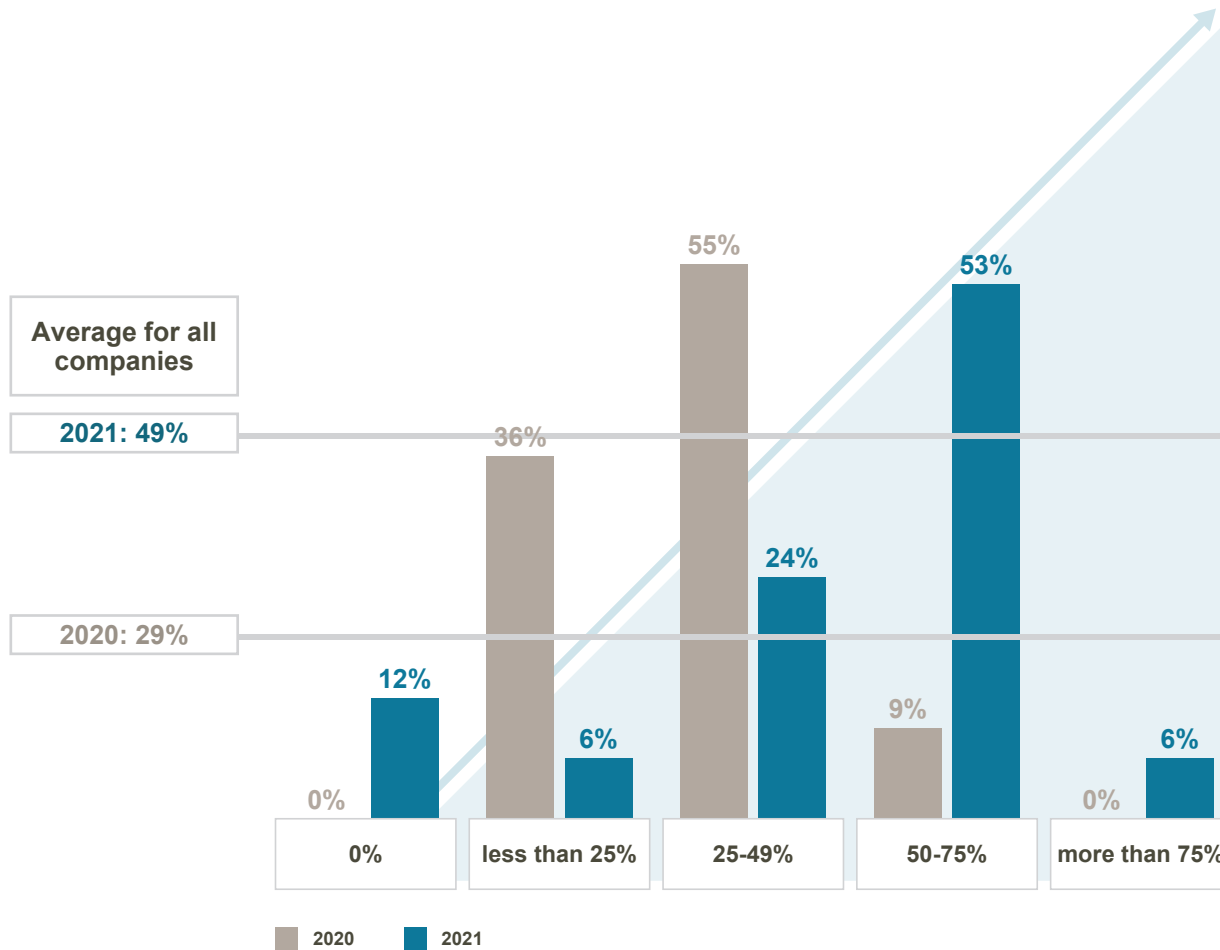


## What do you believe would most help the “bounce back” of exhibitions?

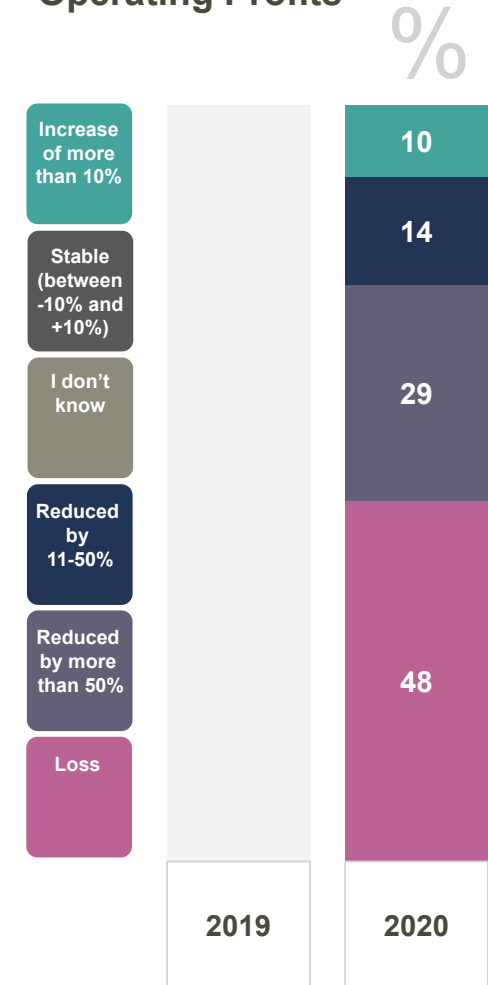




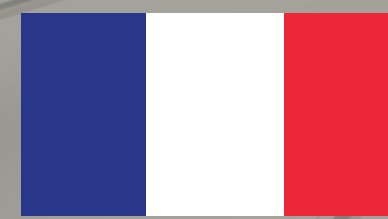
## Revenue compared to 2019



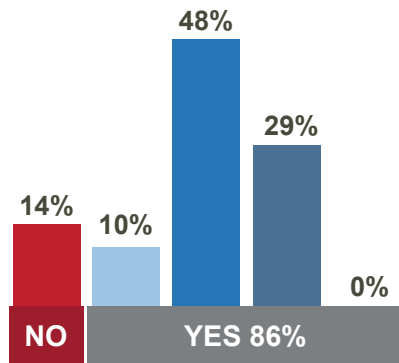
## Operating Profits



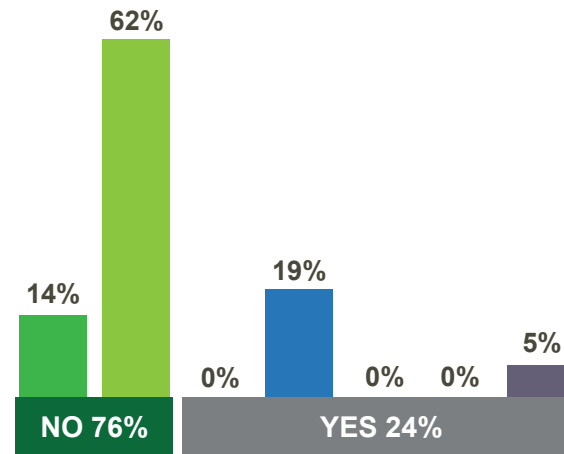
# Detailed results for France



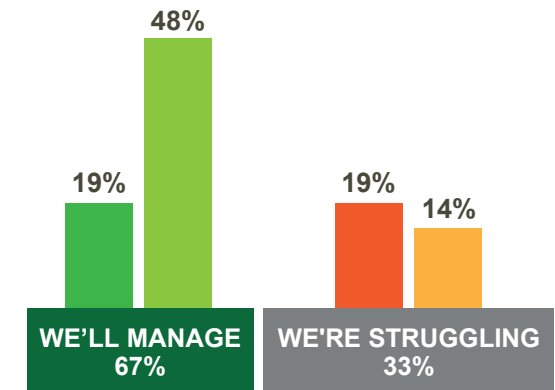
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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

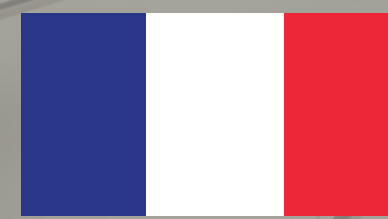


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- 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

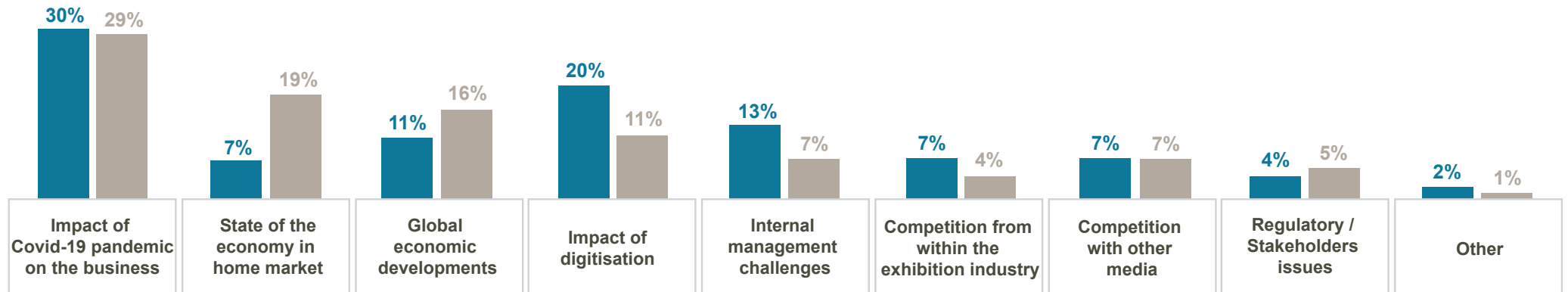
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for France



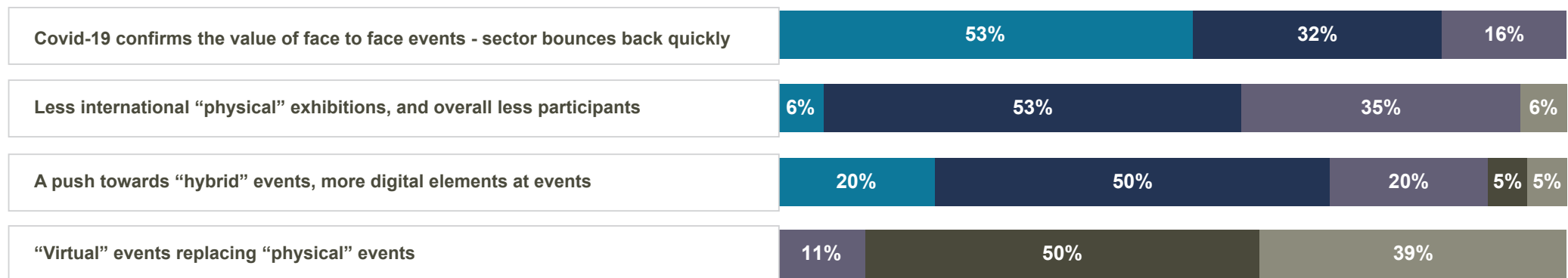
## Most important business issues in the exhibition industry

France Global

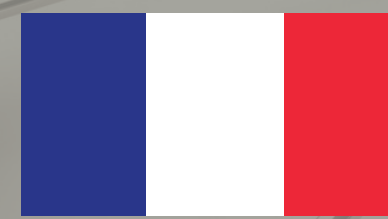


## Format of exhibitions in the coming years

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



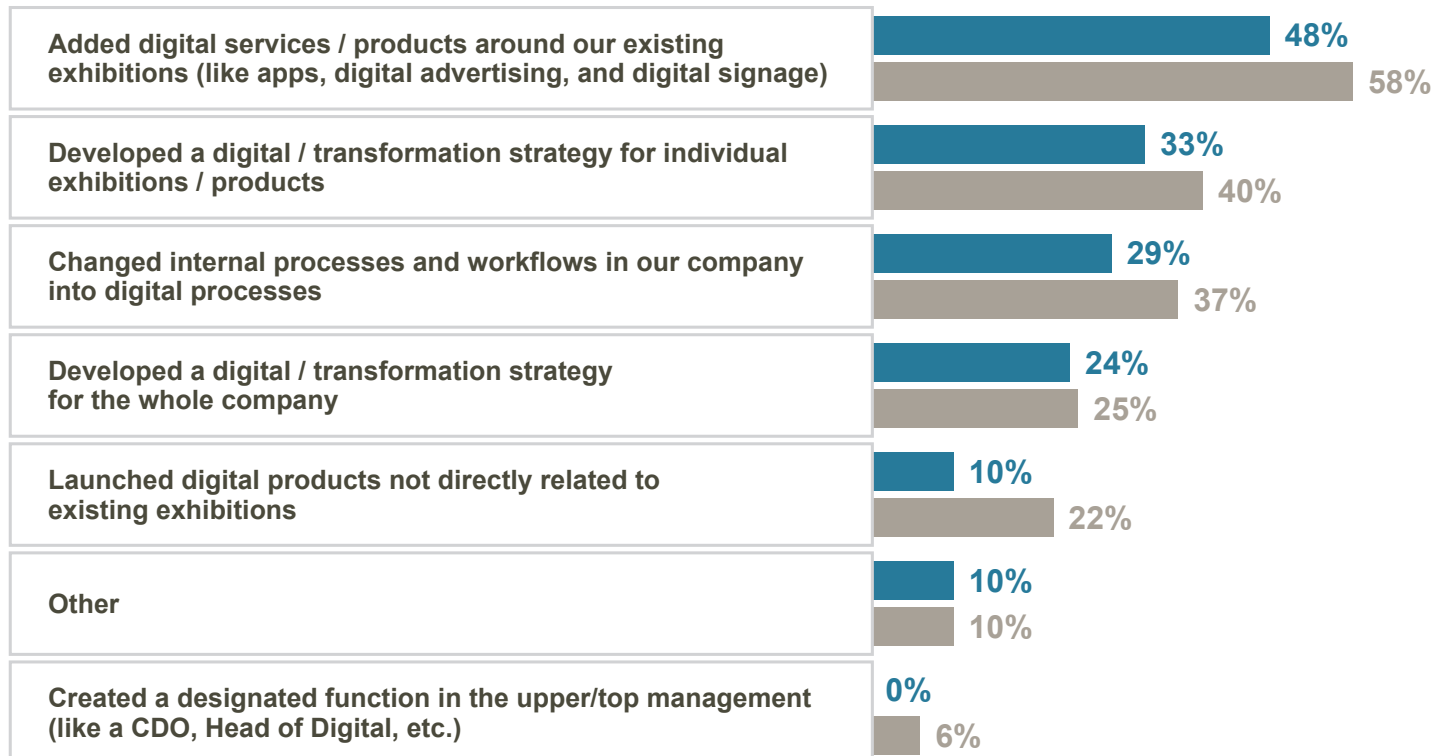


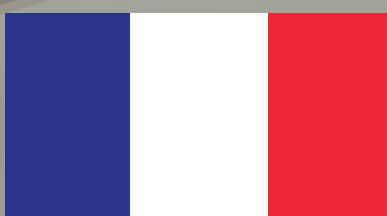


France

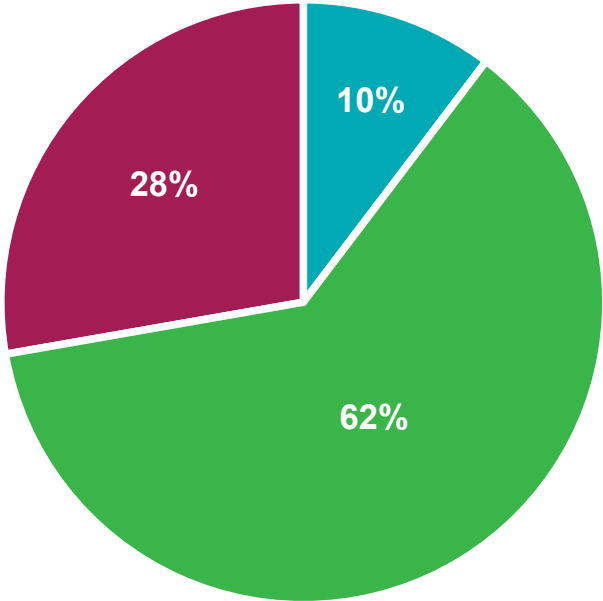
Global

## Digitisation: implementation in France and globally



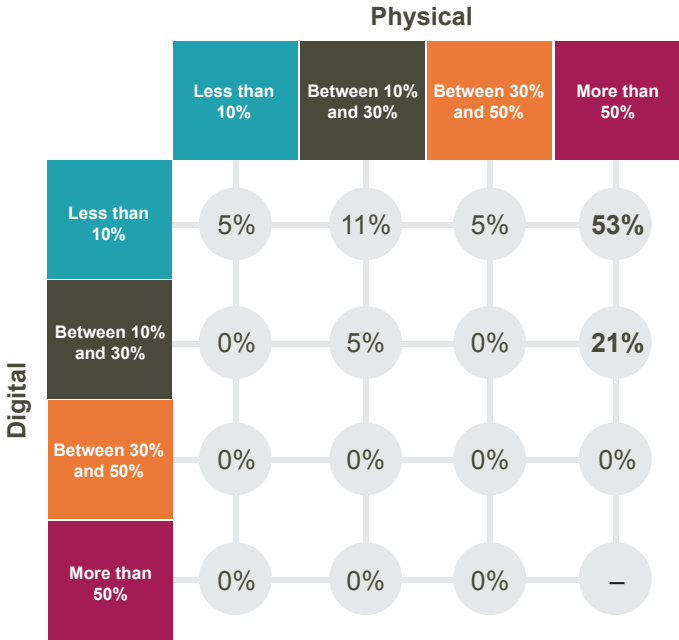


Number of fairs projected in 2021



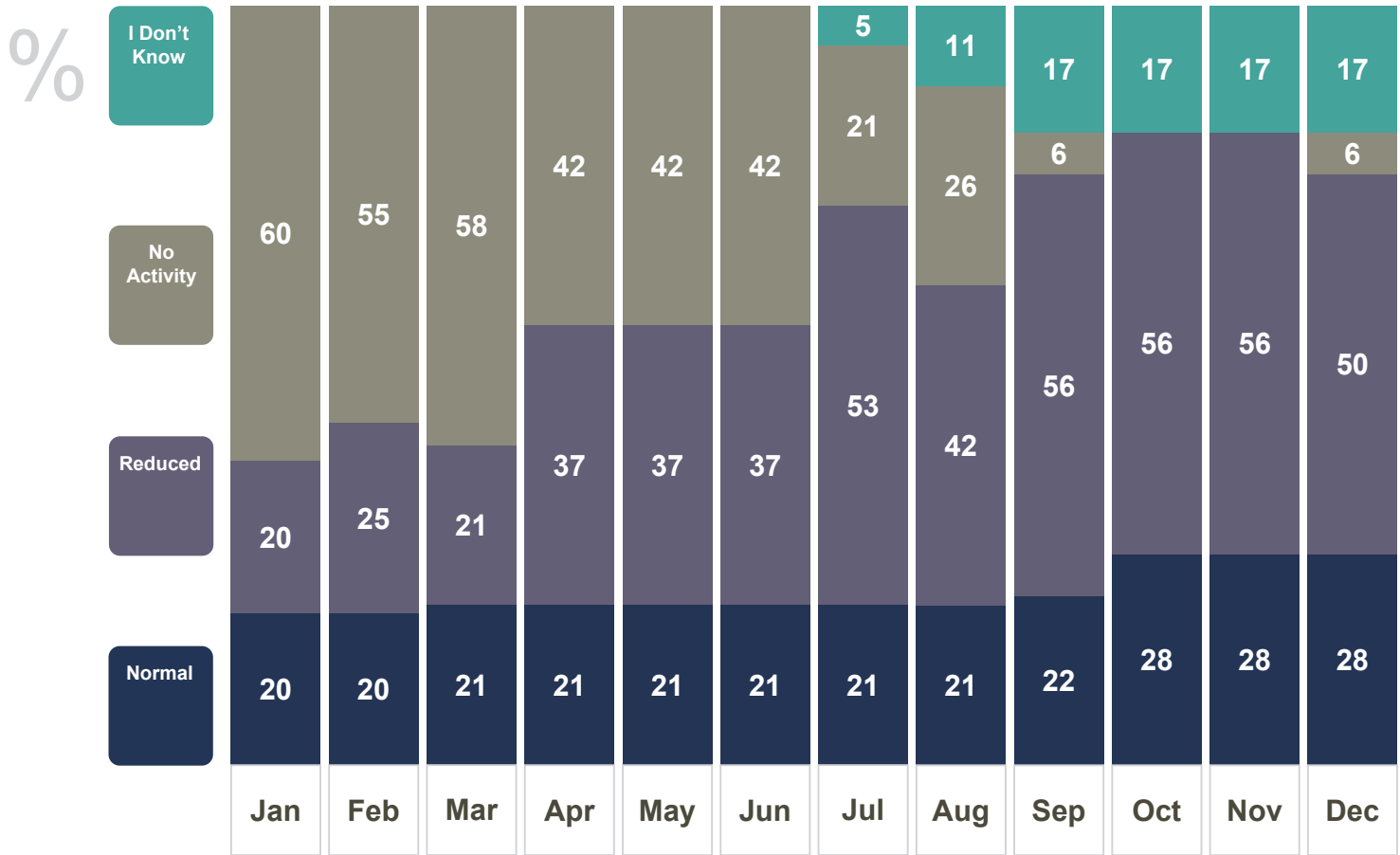
■ Digital   
 ■ Physical   
 ■ Hybrid

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



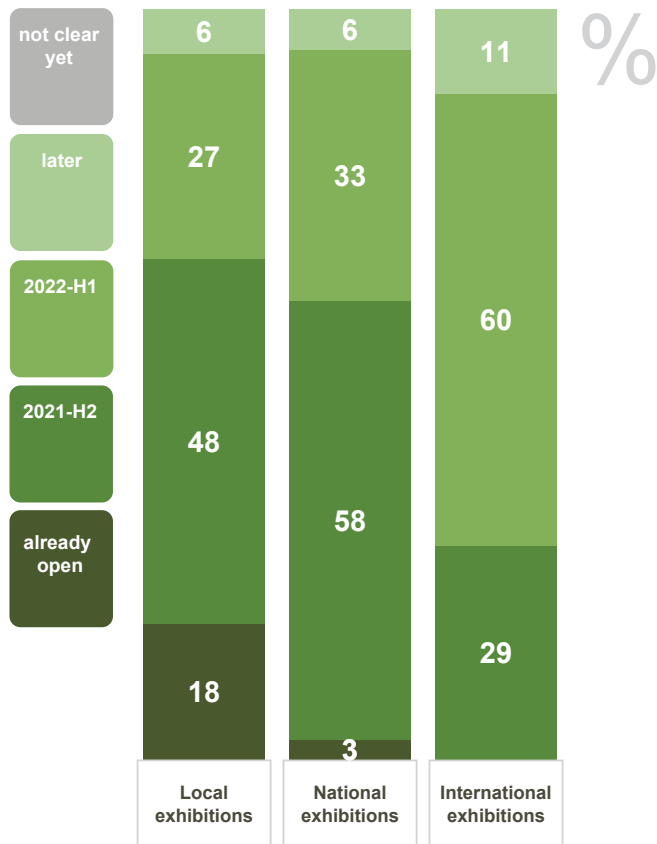


## Situation of industry operations in 2021

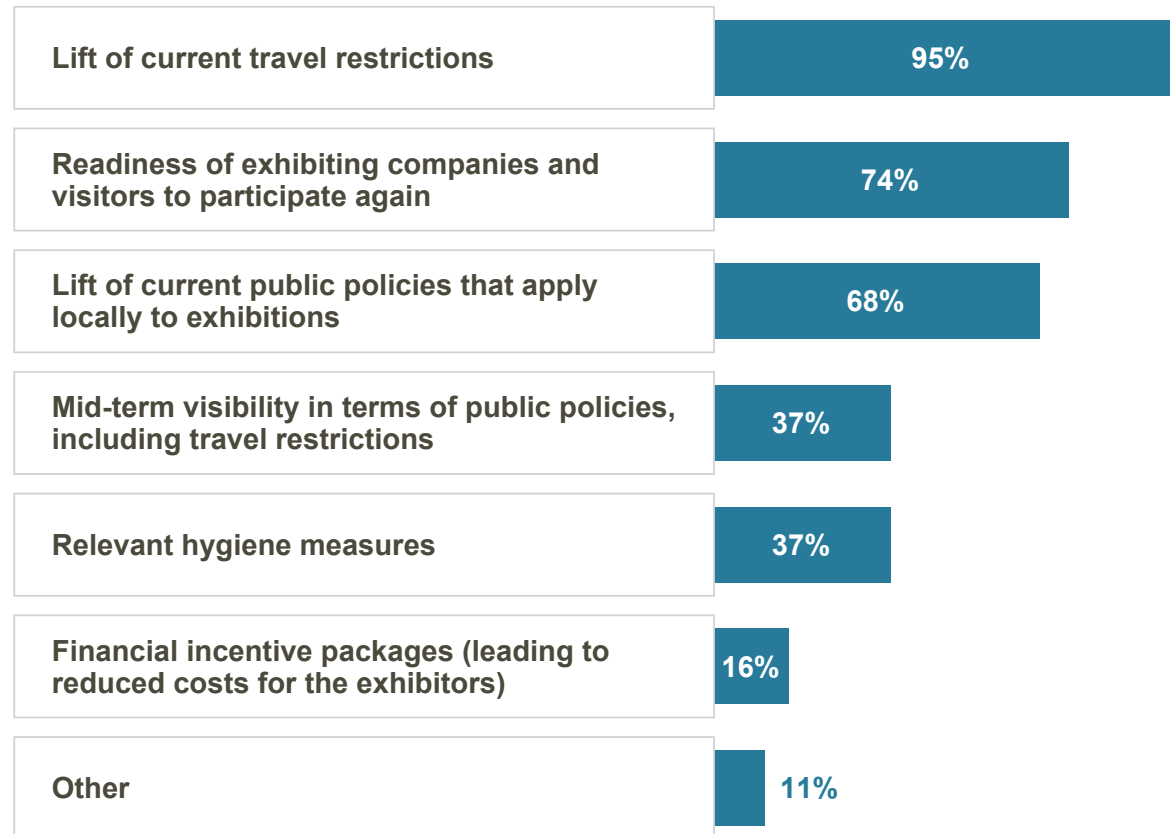




## When do you believe exhibitions will open again in your city?

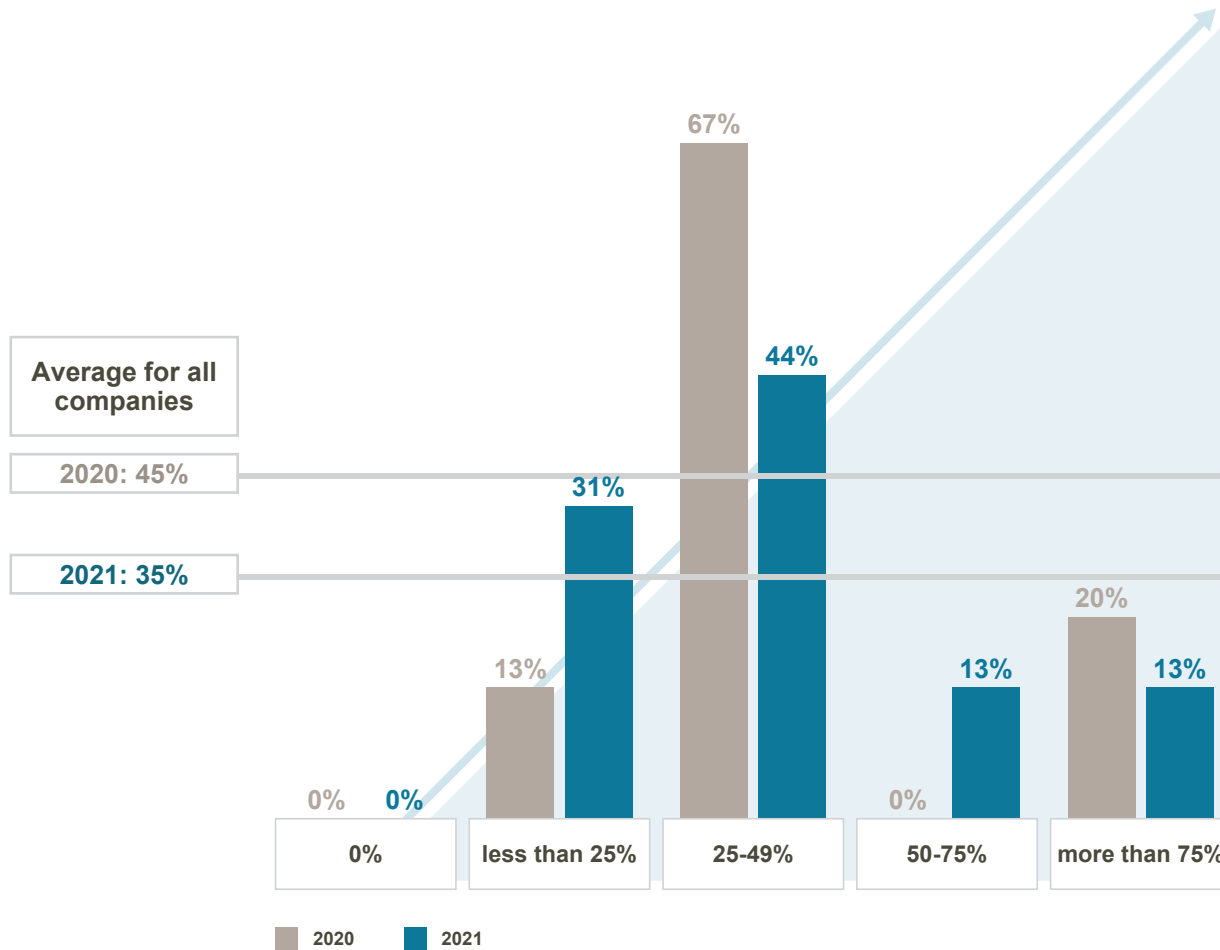


## What do you believe would most help the “bounce back” of exhibitions?

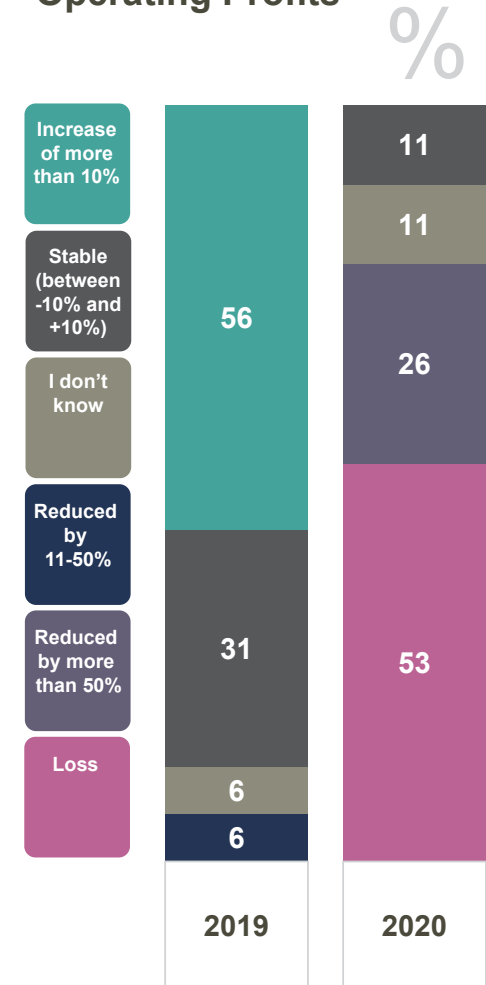




## Revenue compared to 2019

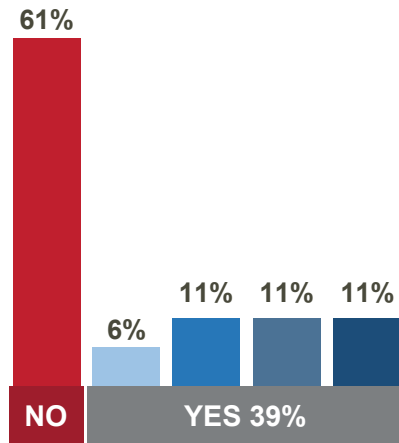


## Operating Profits

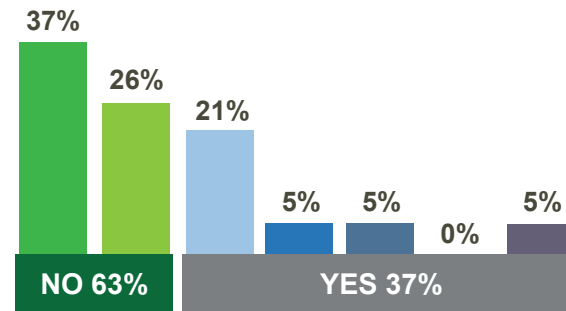




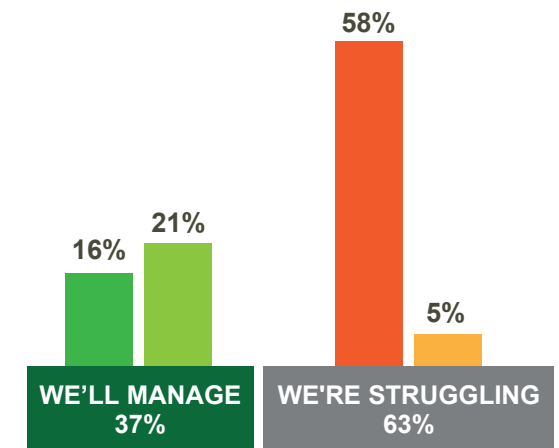
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

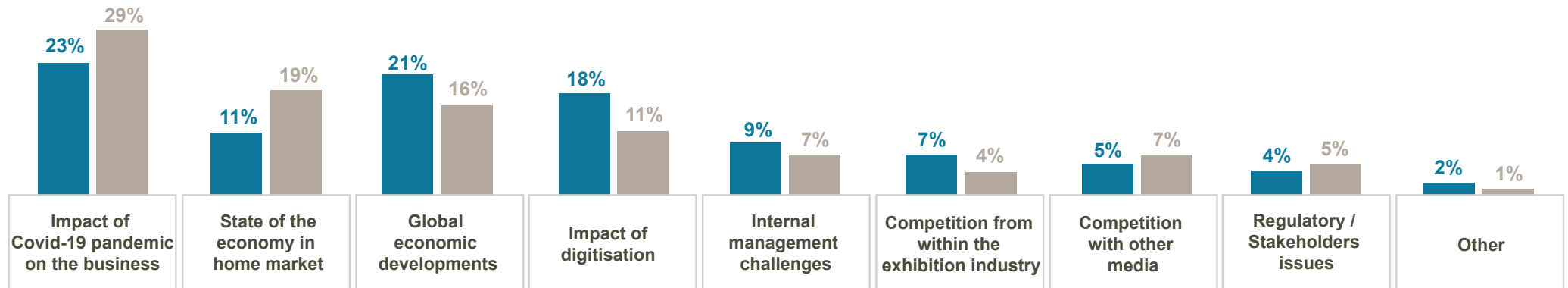
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down



## Most important business issues in the exhibition industry

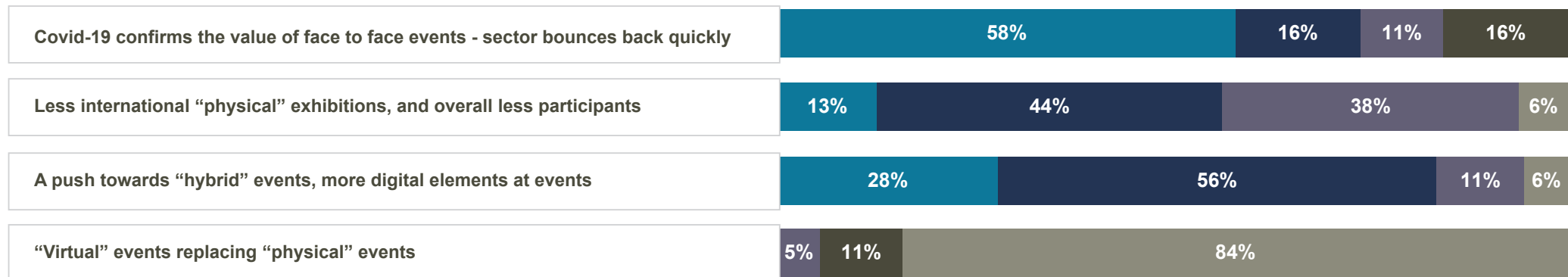
Germany

Global



## Format of exhibitions in the coming years

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

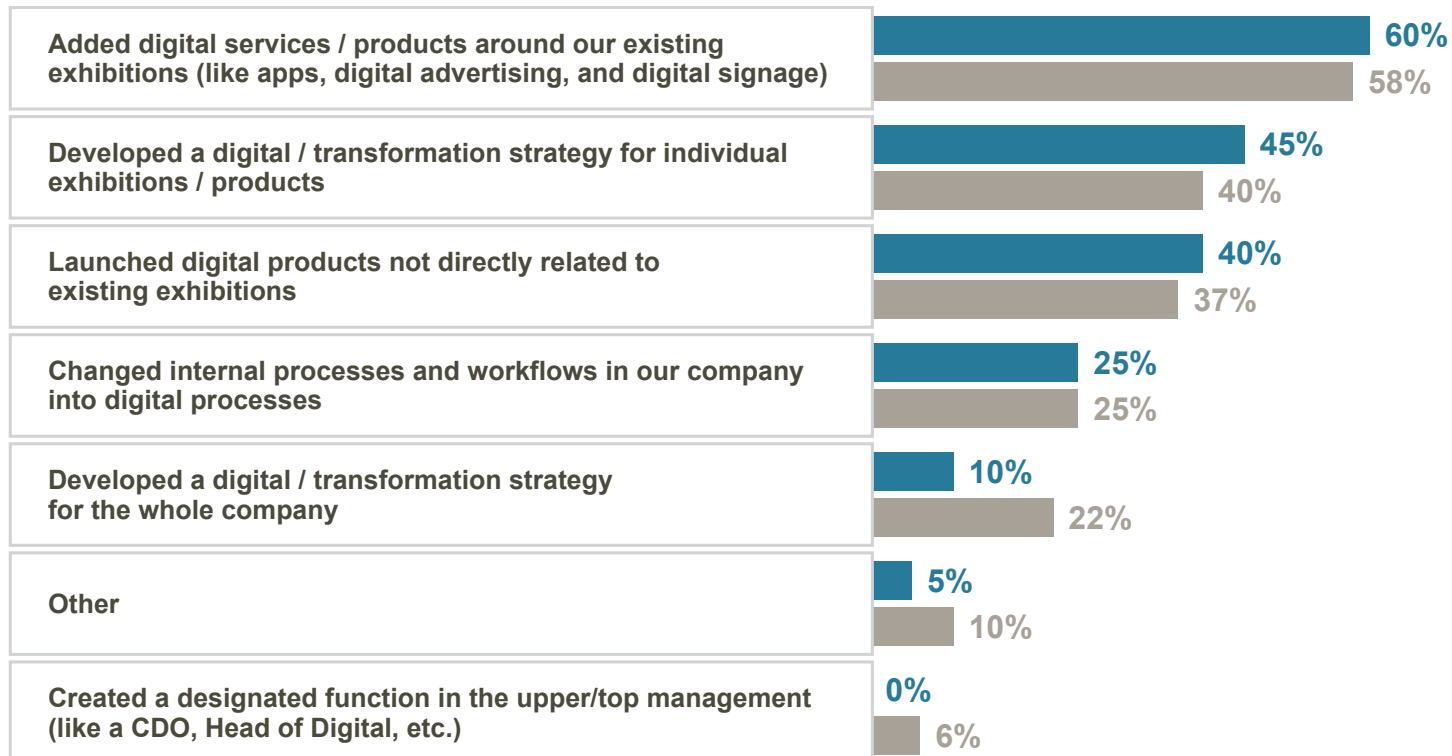




Germany

Global

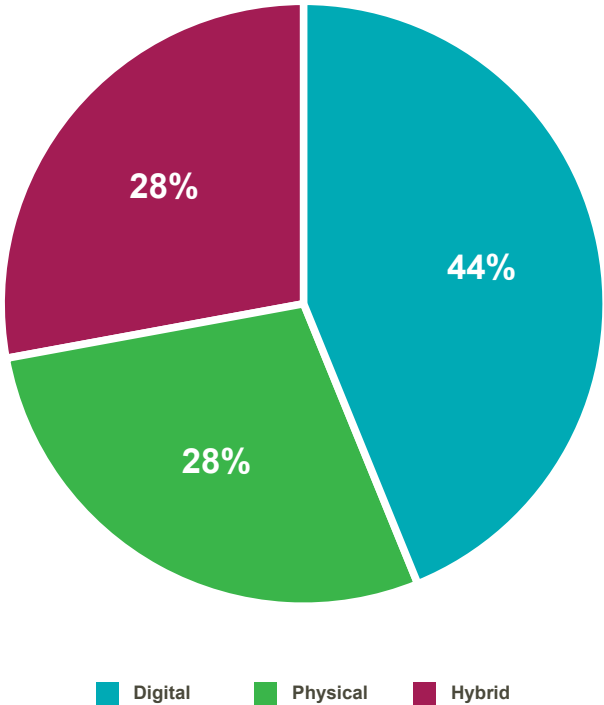
## Digitisation: implementation in Germany and globally



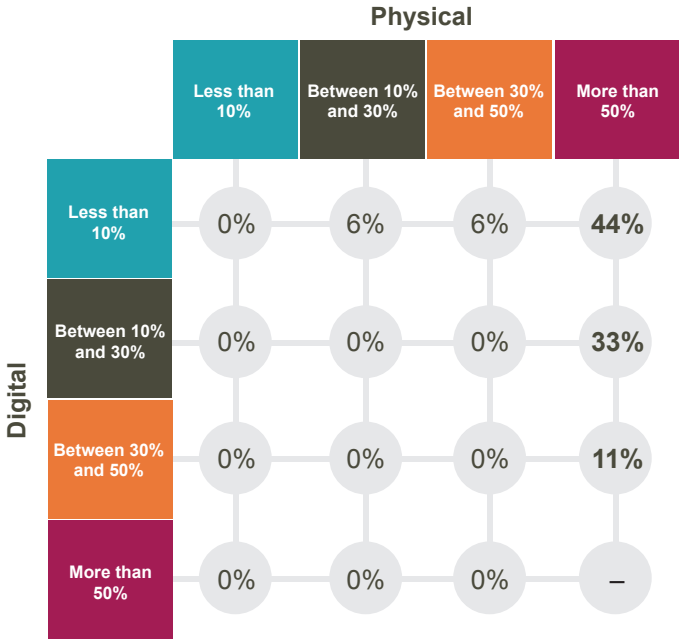




Number of fairs projected in 2021

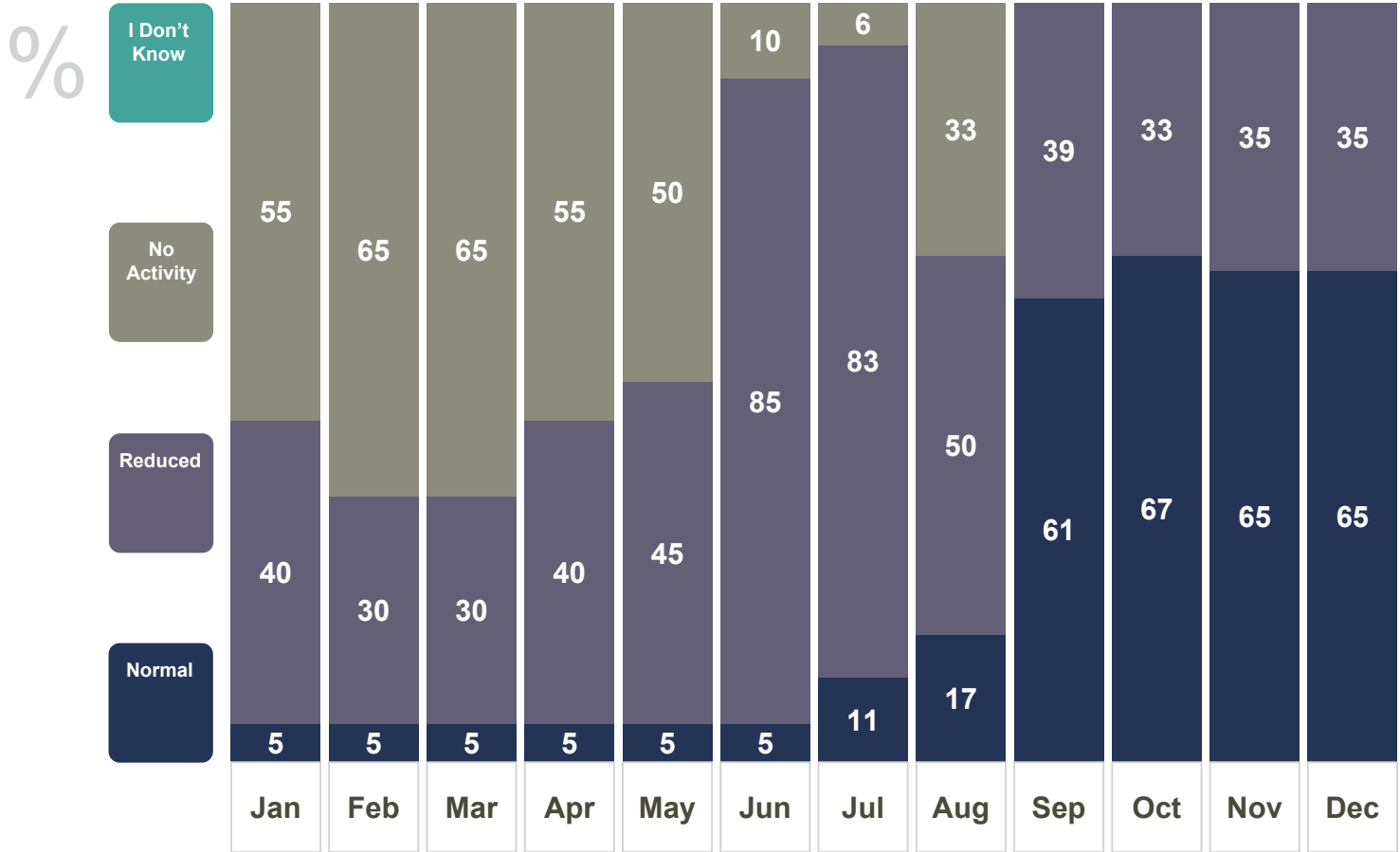


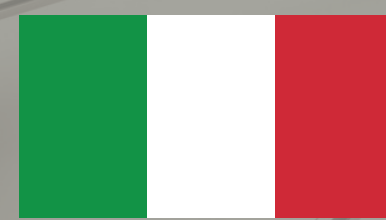
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



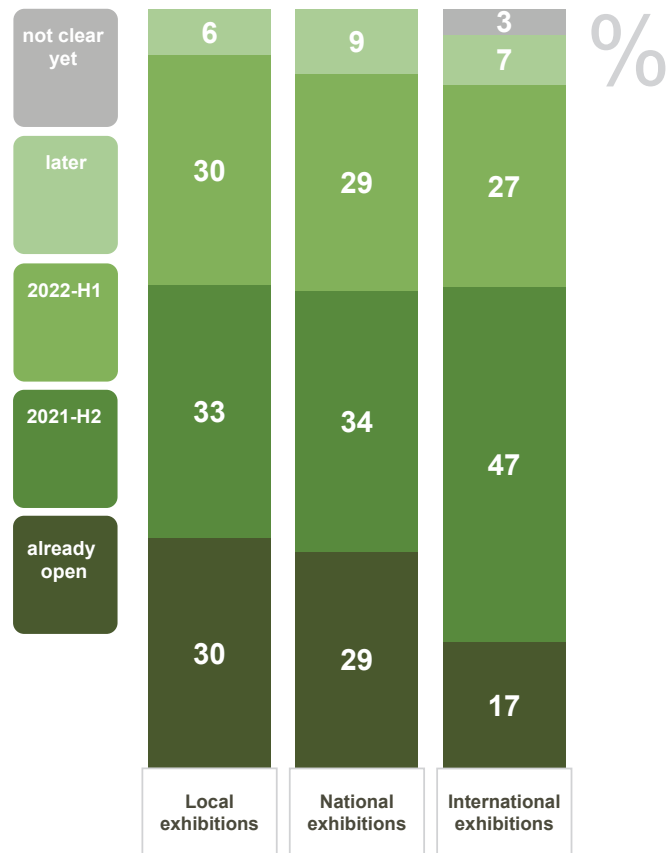


## Situation of industry operations in 2021

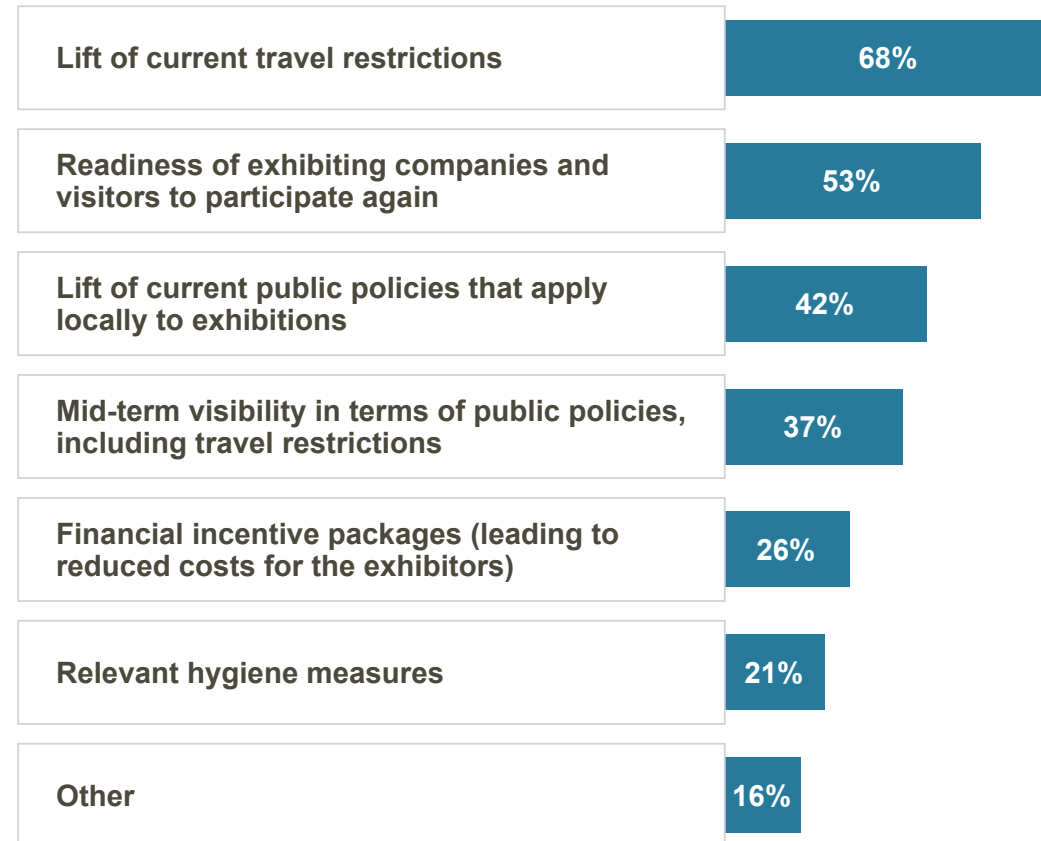


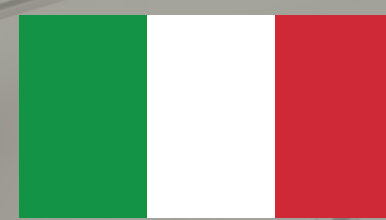


## When do you believe exhibitions will open again in your city?

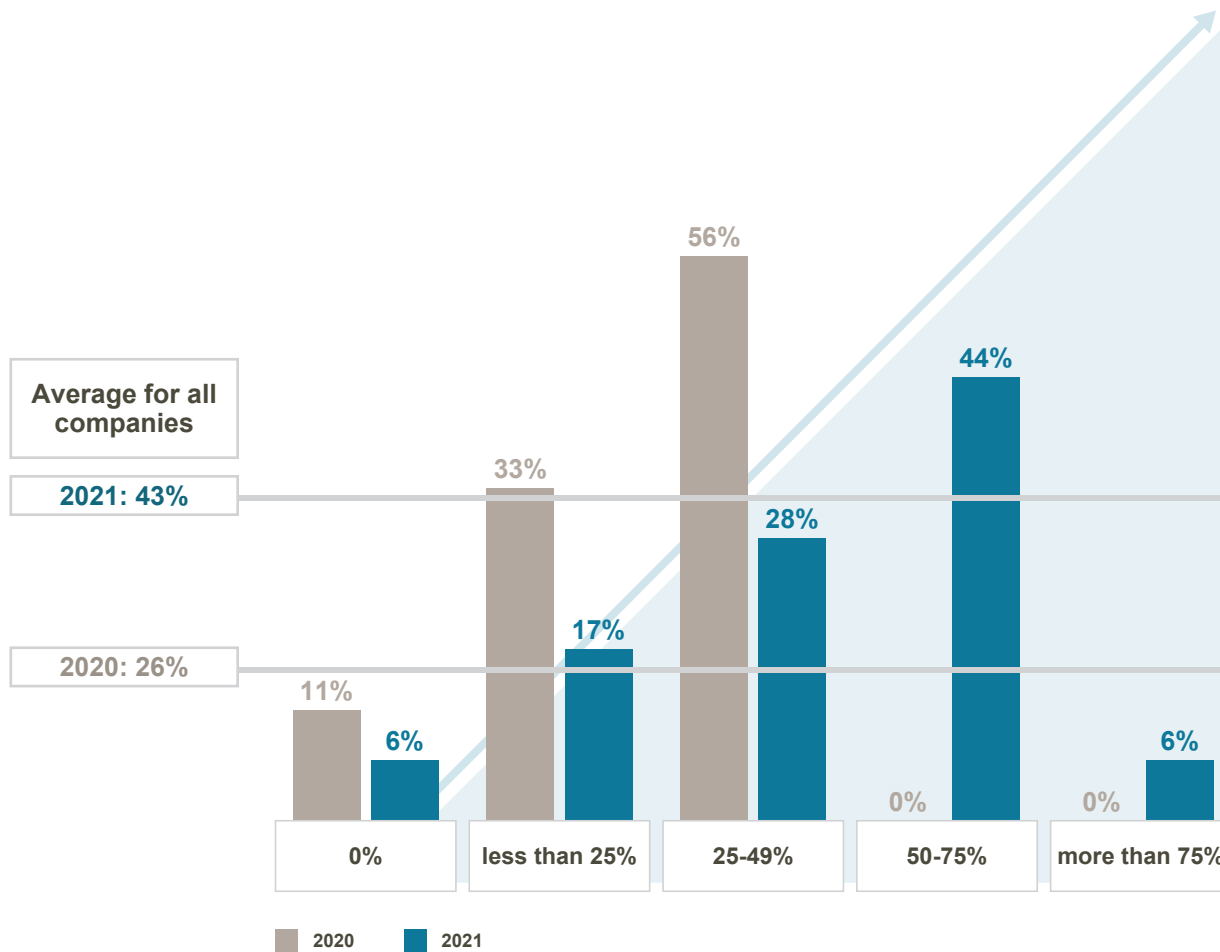


## What do you believe would most help the “bounce back” of exhibitions?

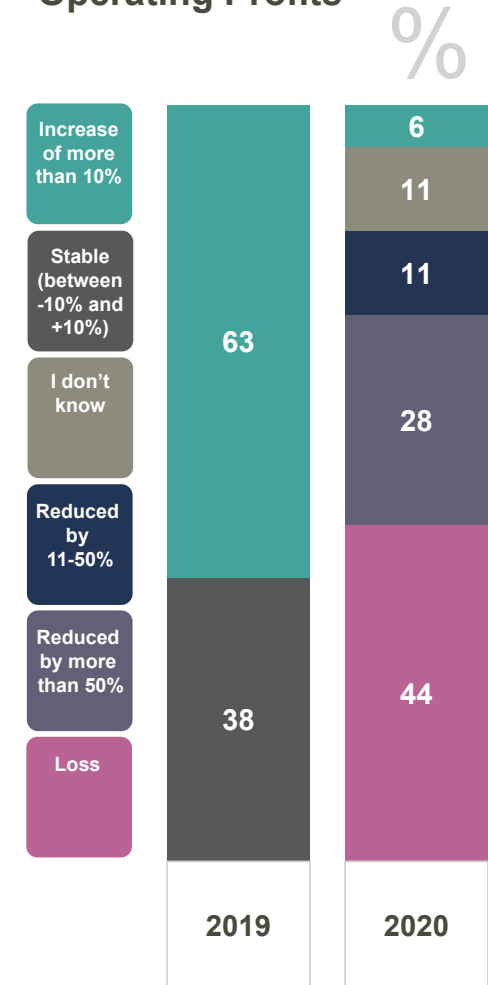


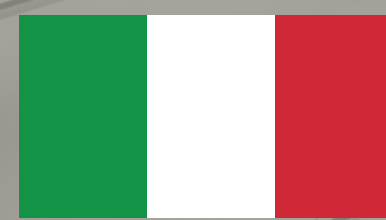


## Revenue compared to 2019

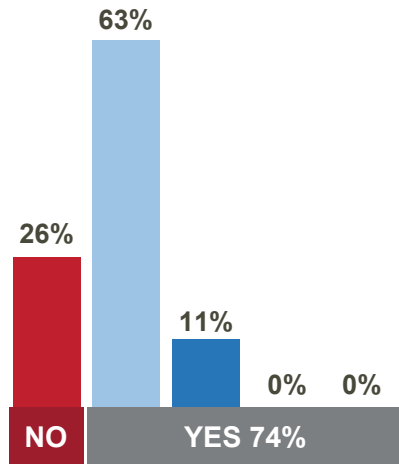


## Operating Profits

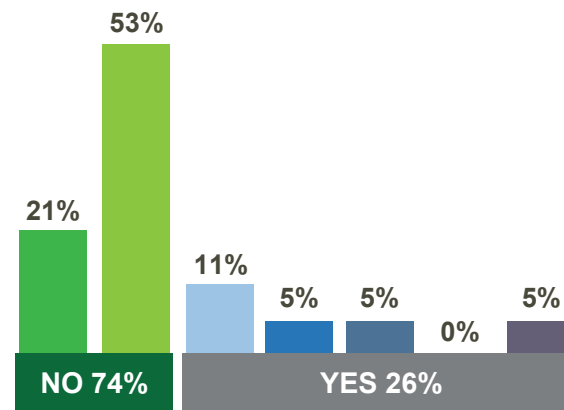




## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



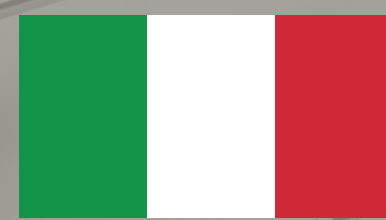
## If there is no business for the next 6 months, which best applies?



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

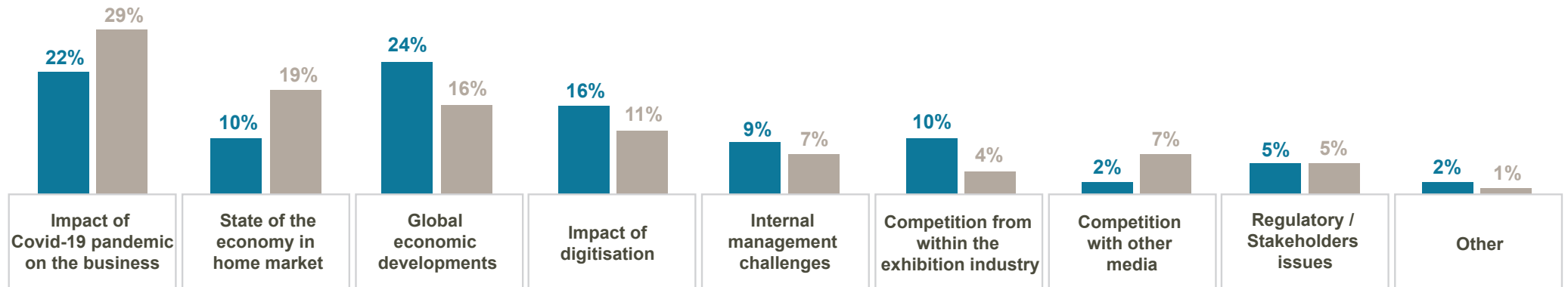
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



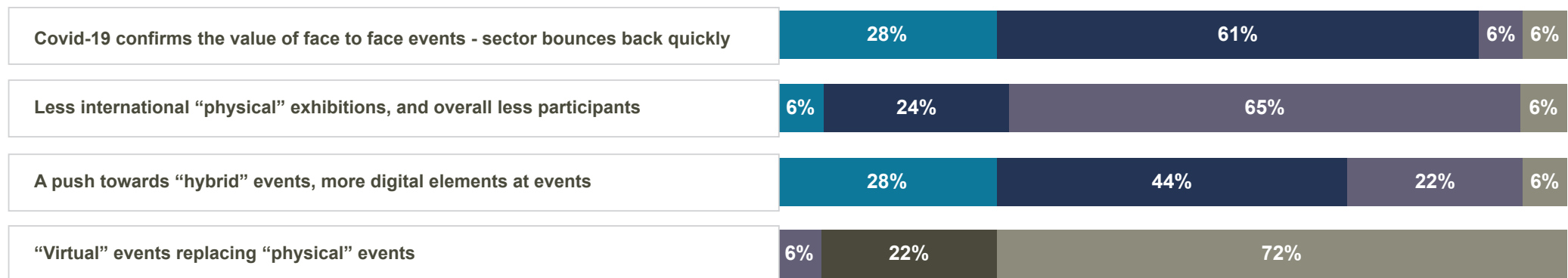
## Most important business issues in the exhibition industry

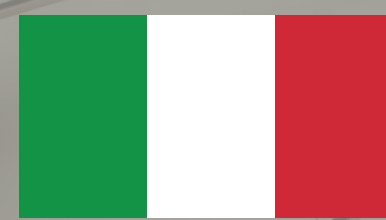
Italy Global



## Format of exhibitions in the coming years

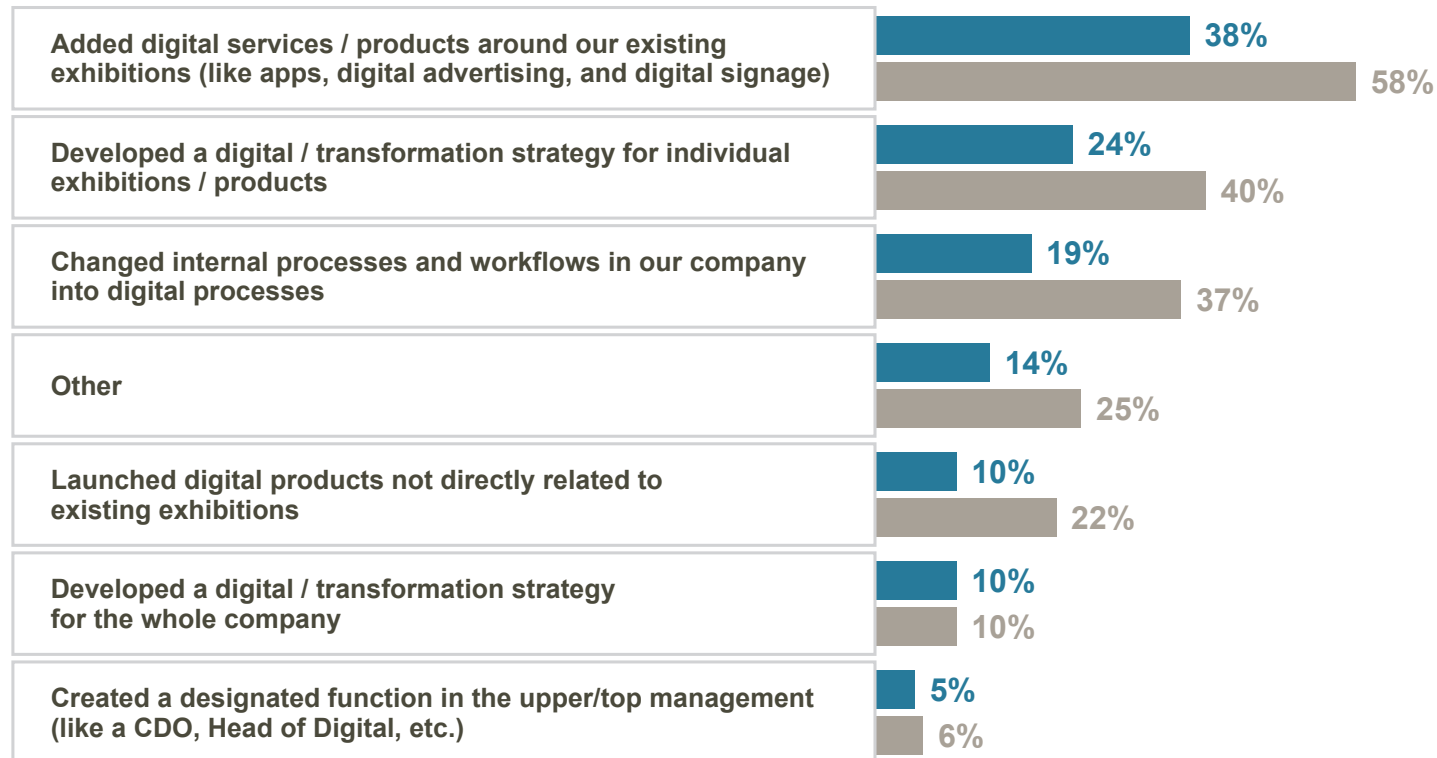
Yes, for sure Most probably Not sure Not sure at all Definitely not

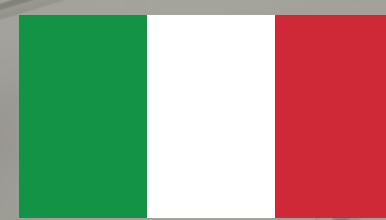




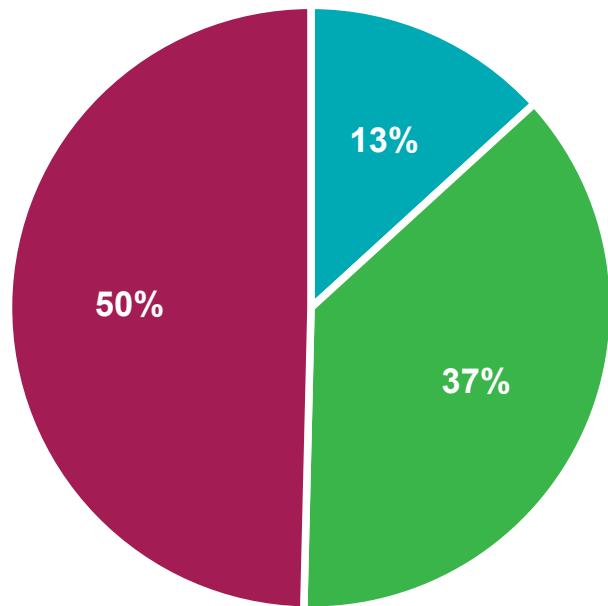
Italy Global

## Digitisation: implementation in Italy and globally



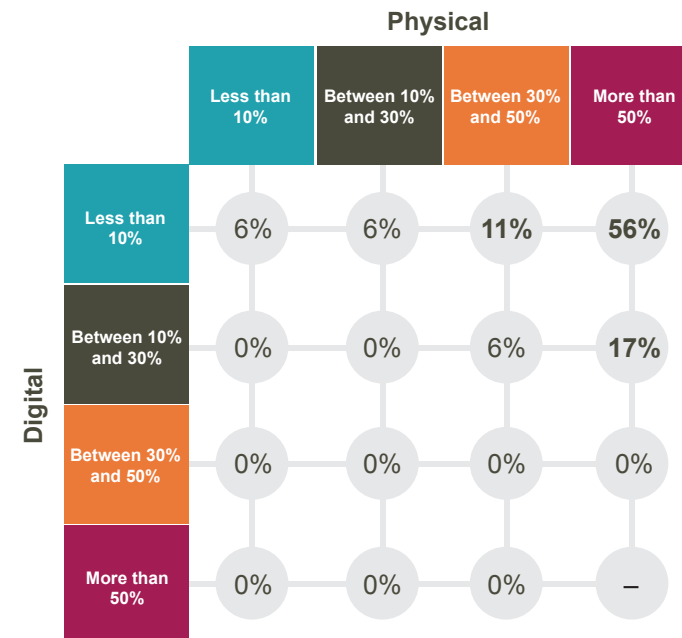


## Number of fairs projected in 2021



■ Digital   
 ■ Physical   
 ■ Hybrid

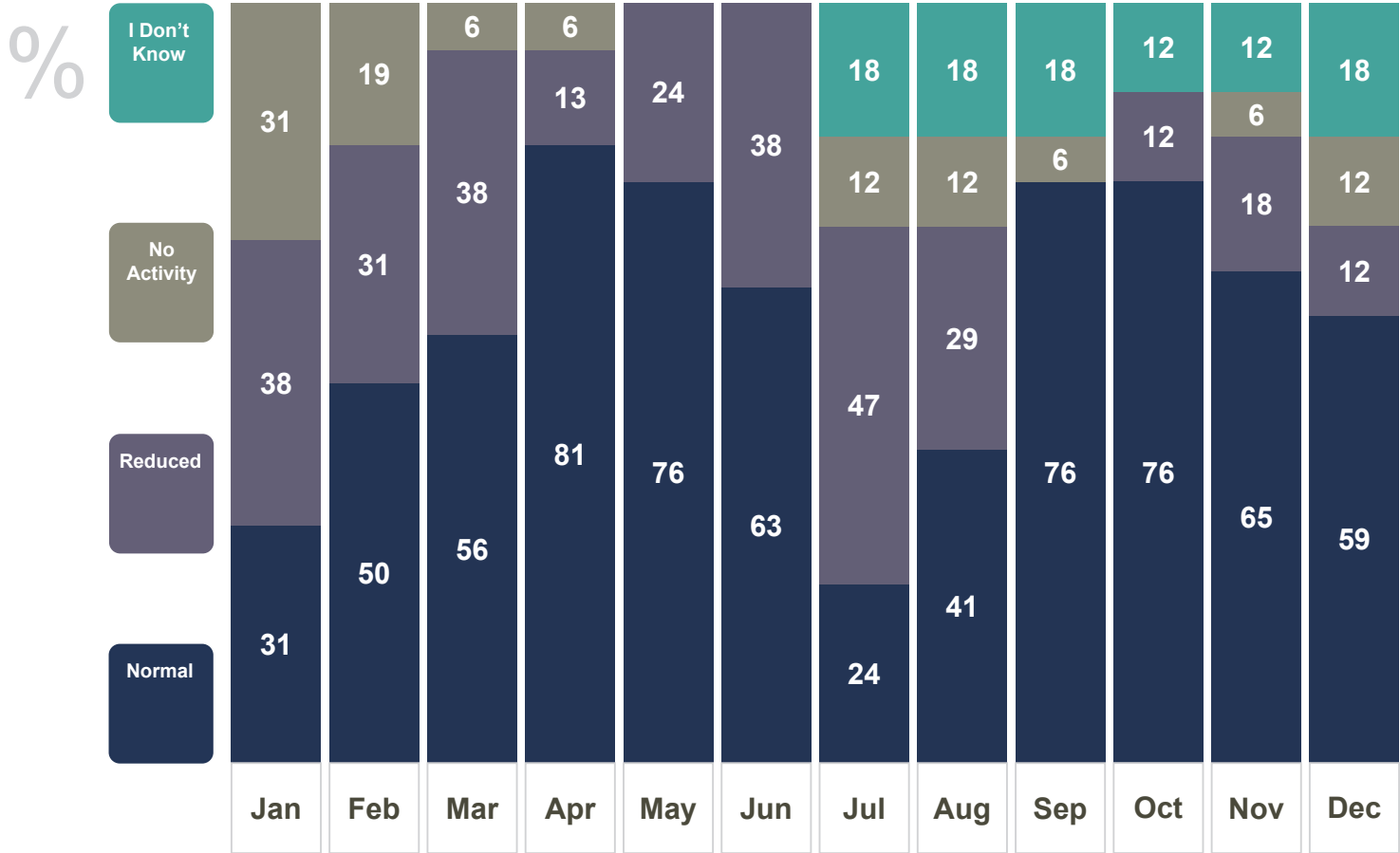
## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

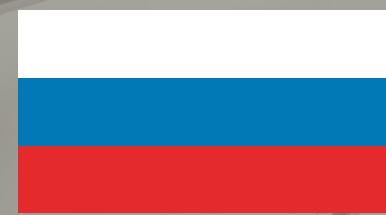




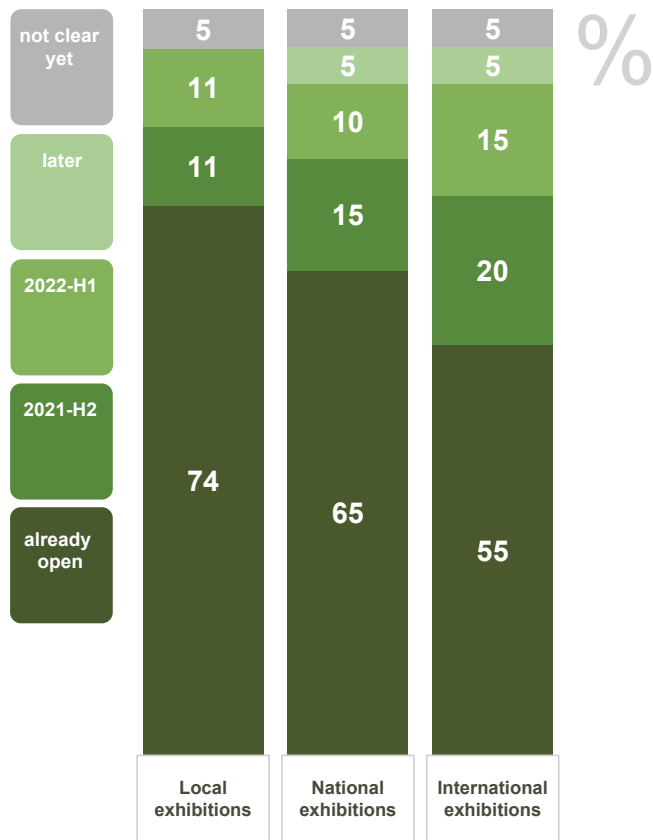


## Situation of industry operations in 2021

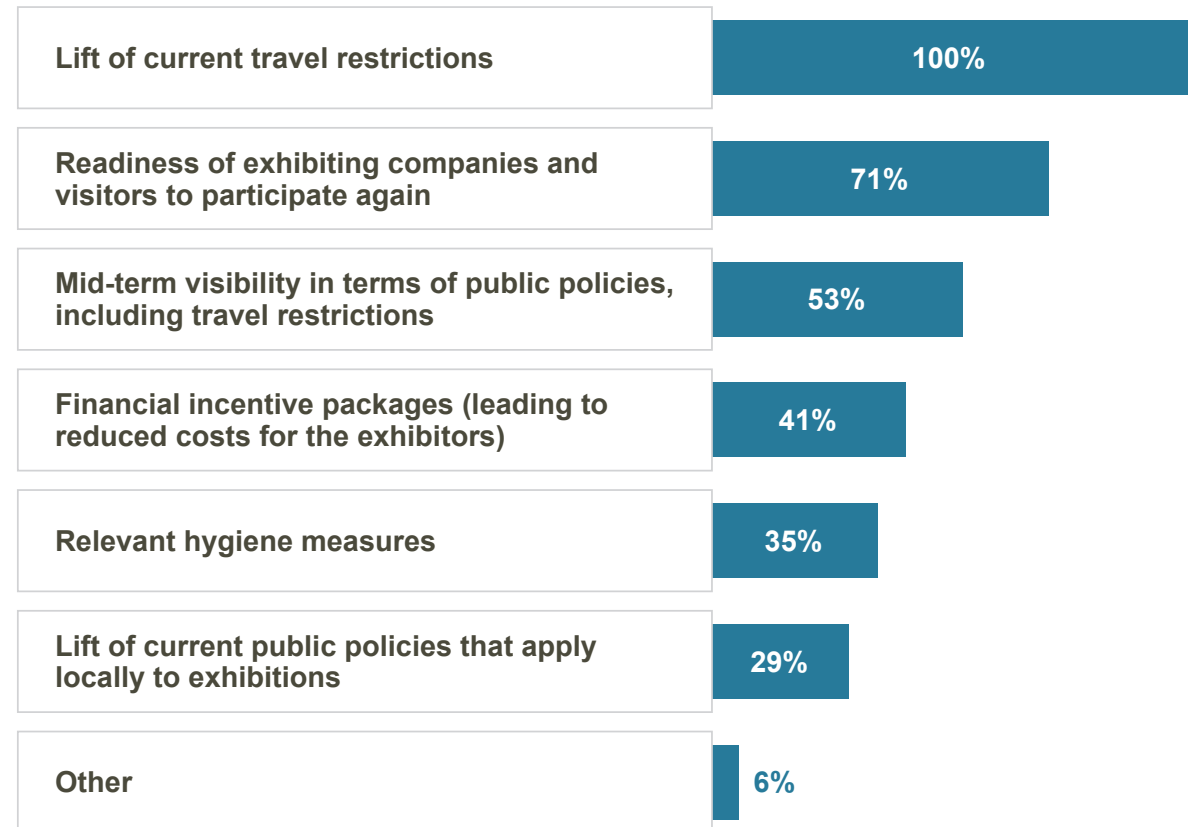


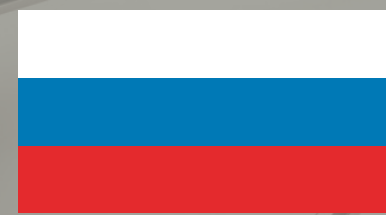


## When do you believe exhibitions will open again in your city?

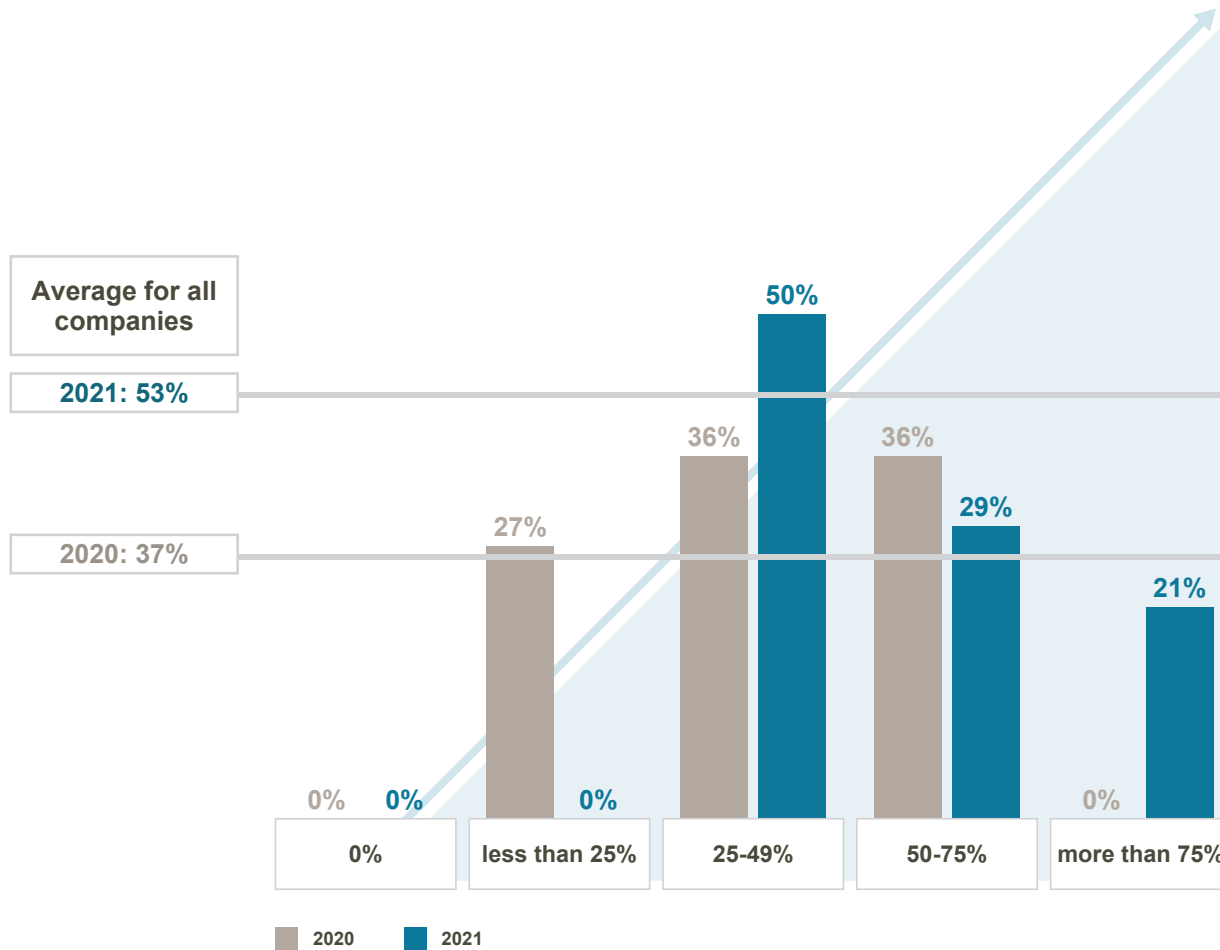


## What do you believe would most help the “bounce back” of exhibitions?

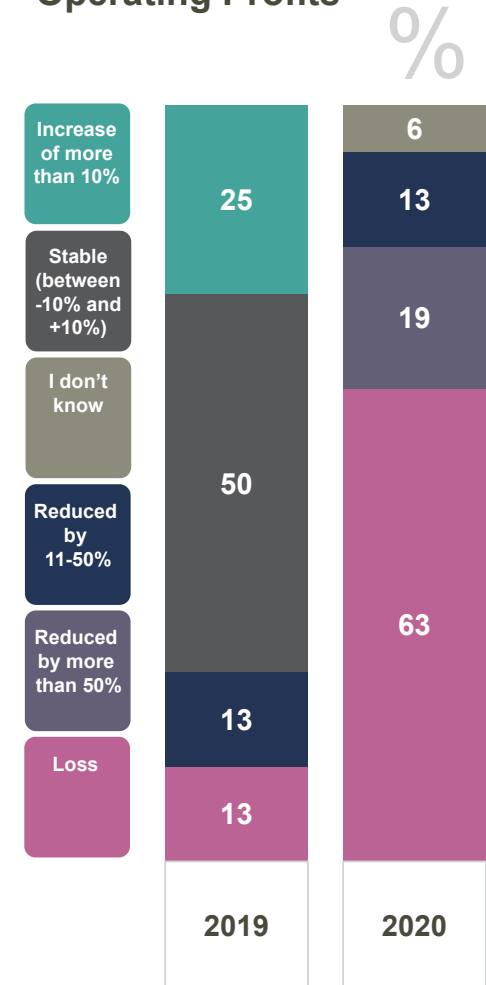




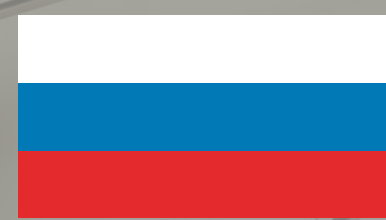
## Revenue compared to 2019



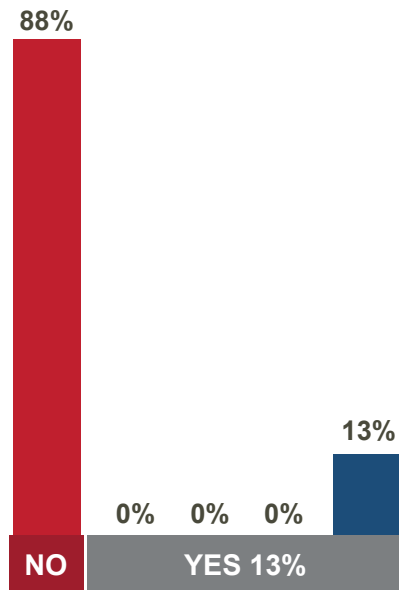
## Operating Profits



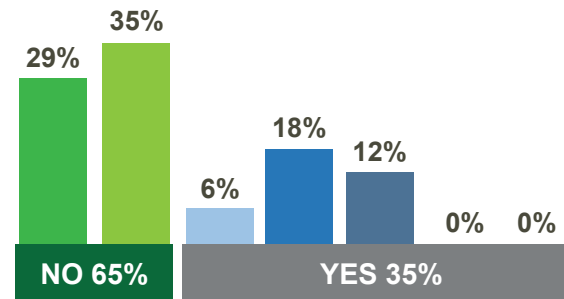
# Detailed results for Russian Federation



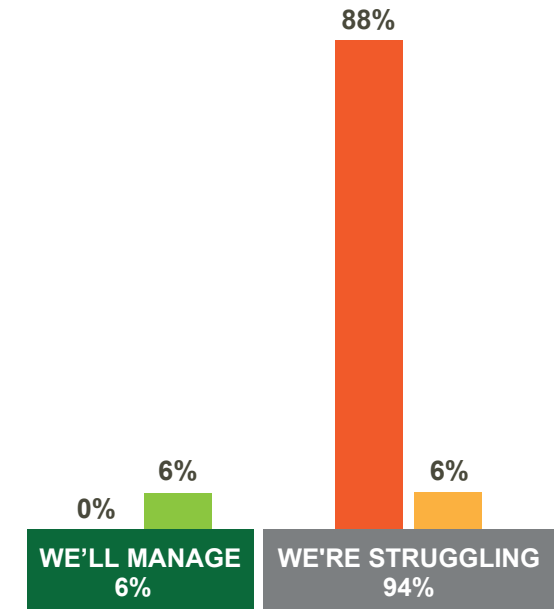
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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

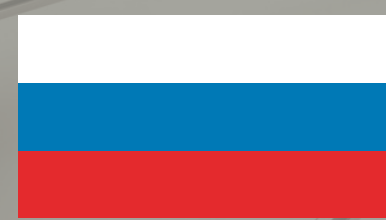


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- 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

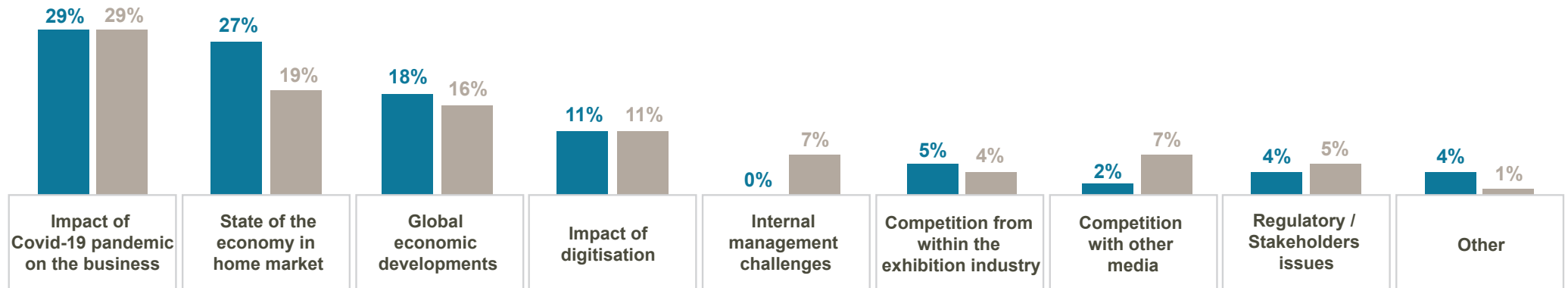
# Detailed results for Russian Federation



## Most important business issues in the exhibition industry

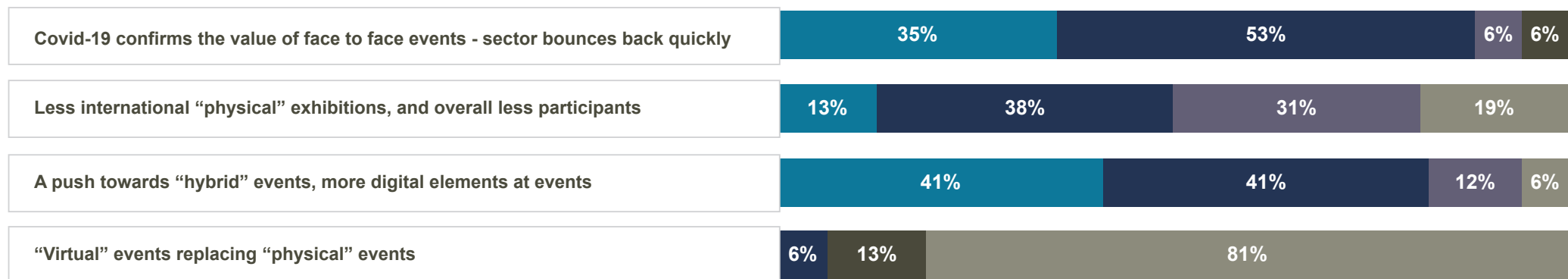
Russia

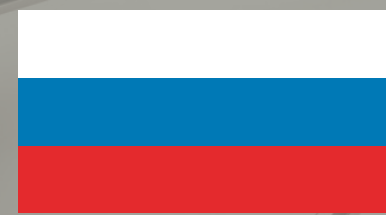
Global



## Format of exhibitions in the coming years

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

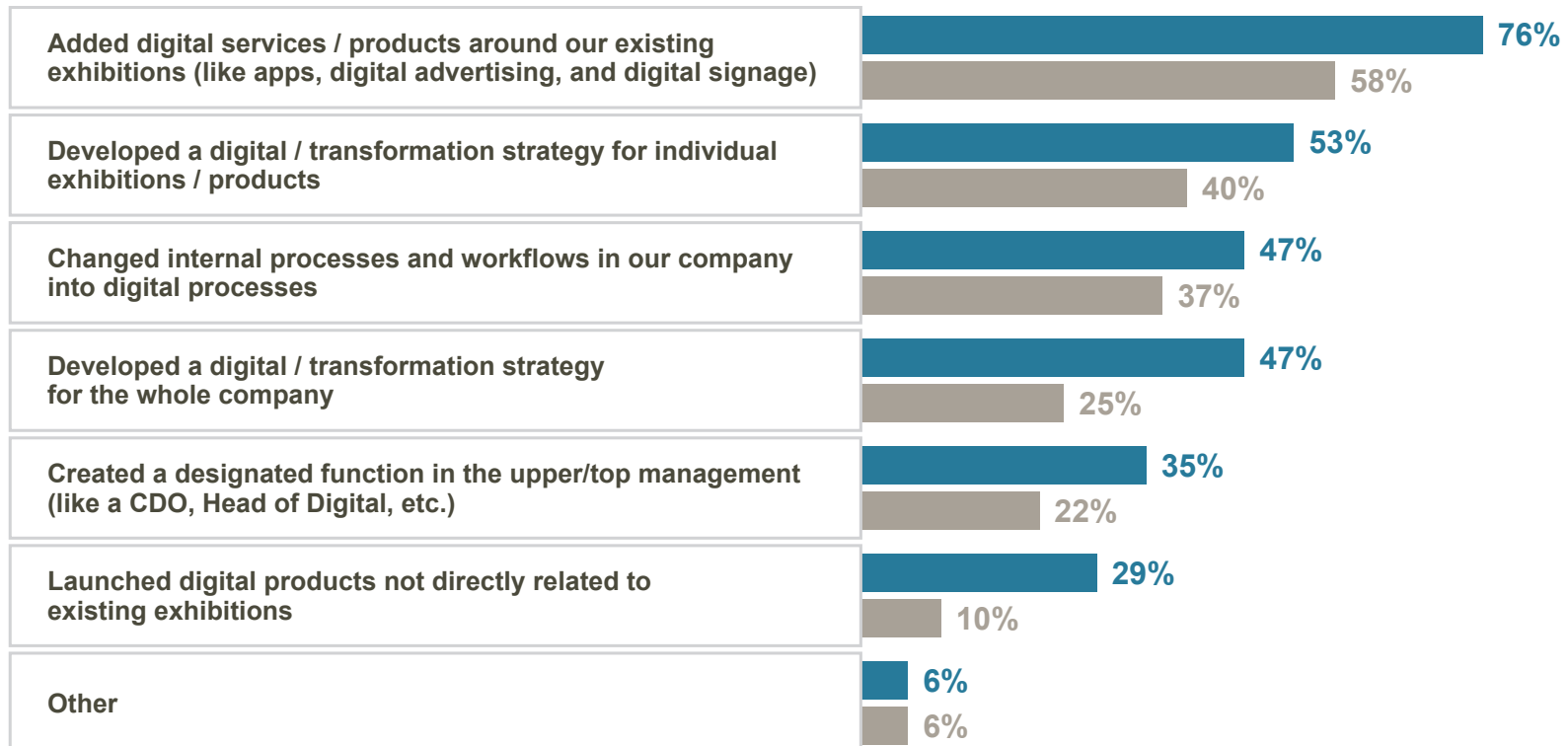


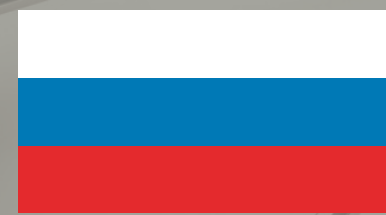


Russian Federation

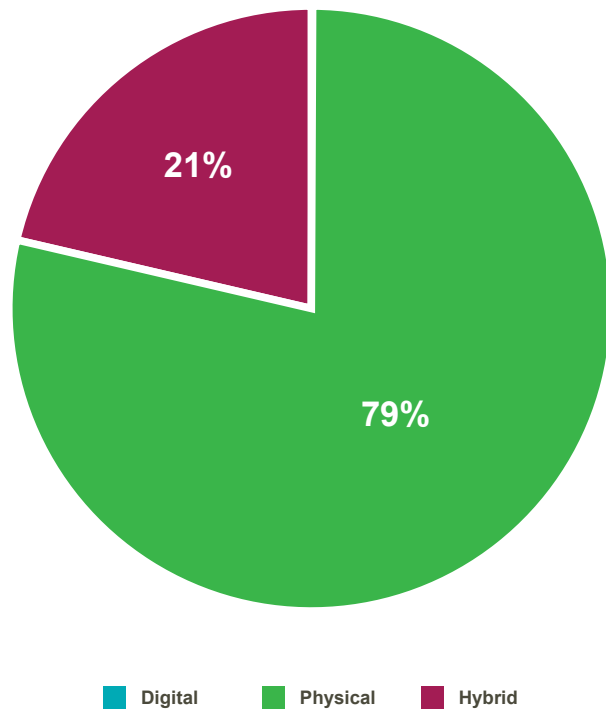
Global

## Digitisation: implementation in Russian Federation and globally

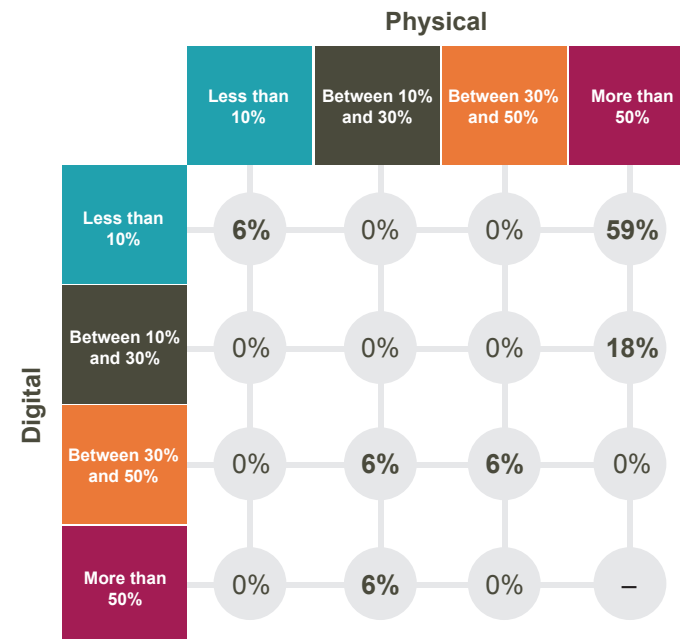




## Number of fairs projected in 2021

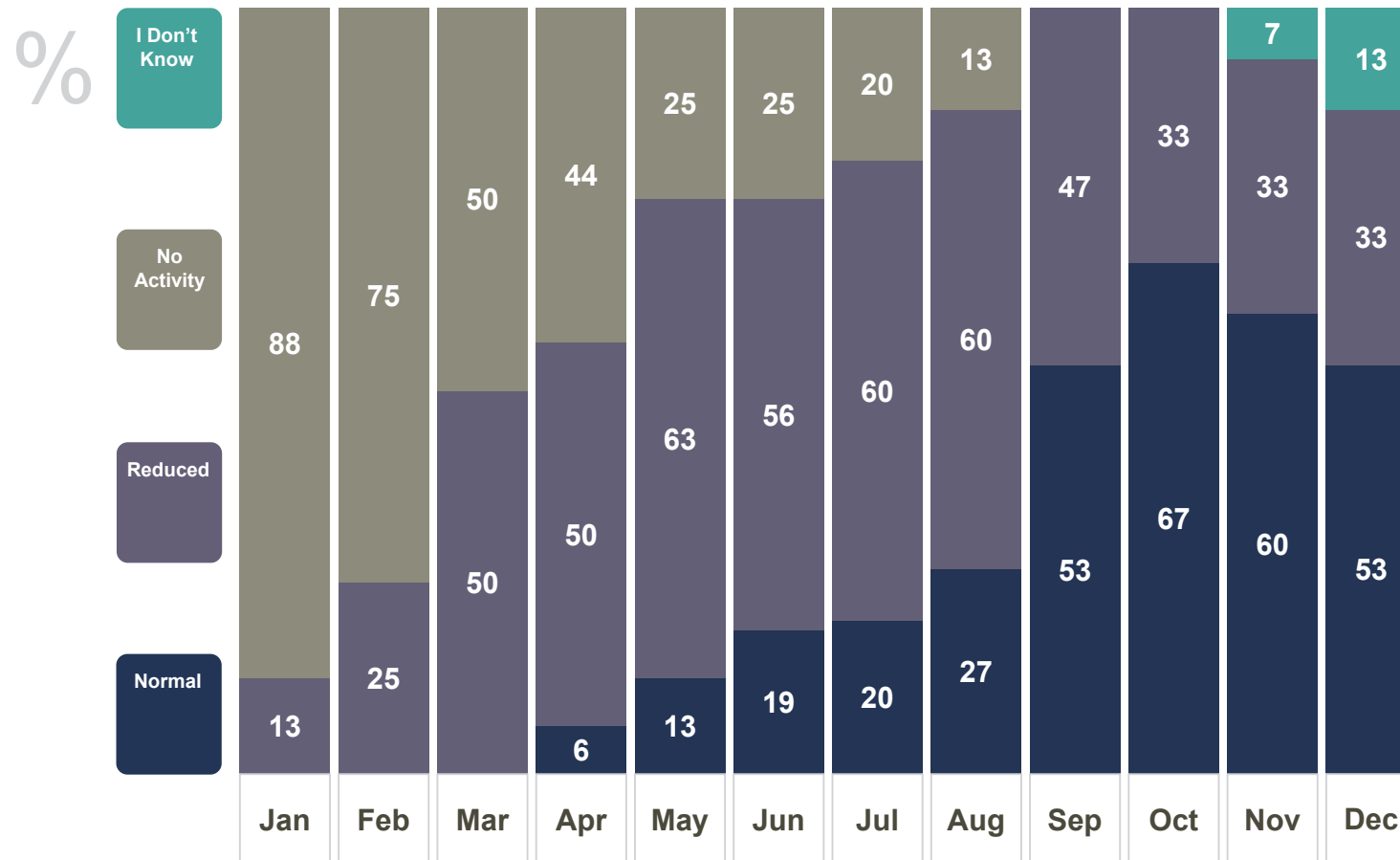


## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years





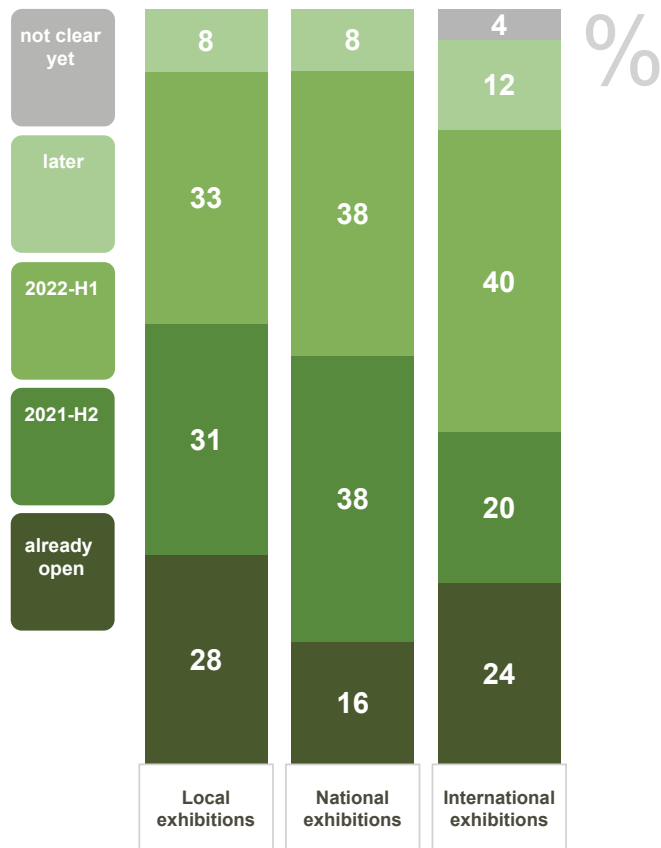
## Situation of industry operations in 2021



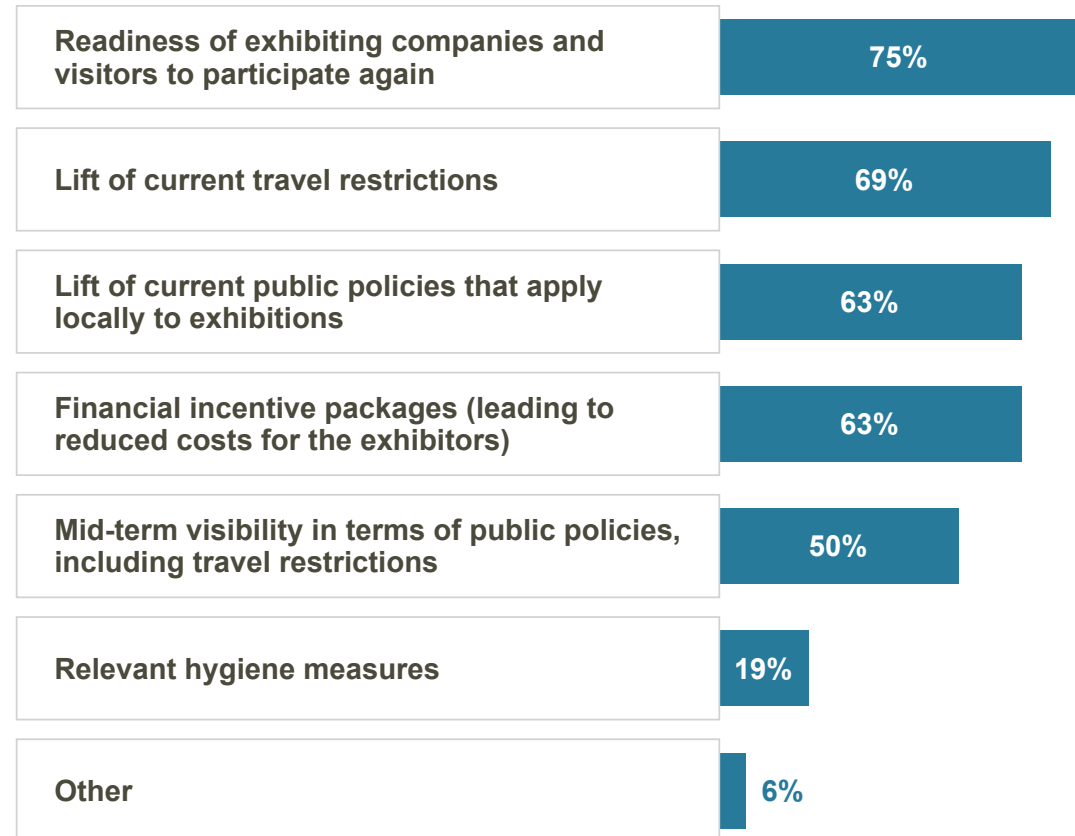




## When do you believe exhibitions will open again in your city?

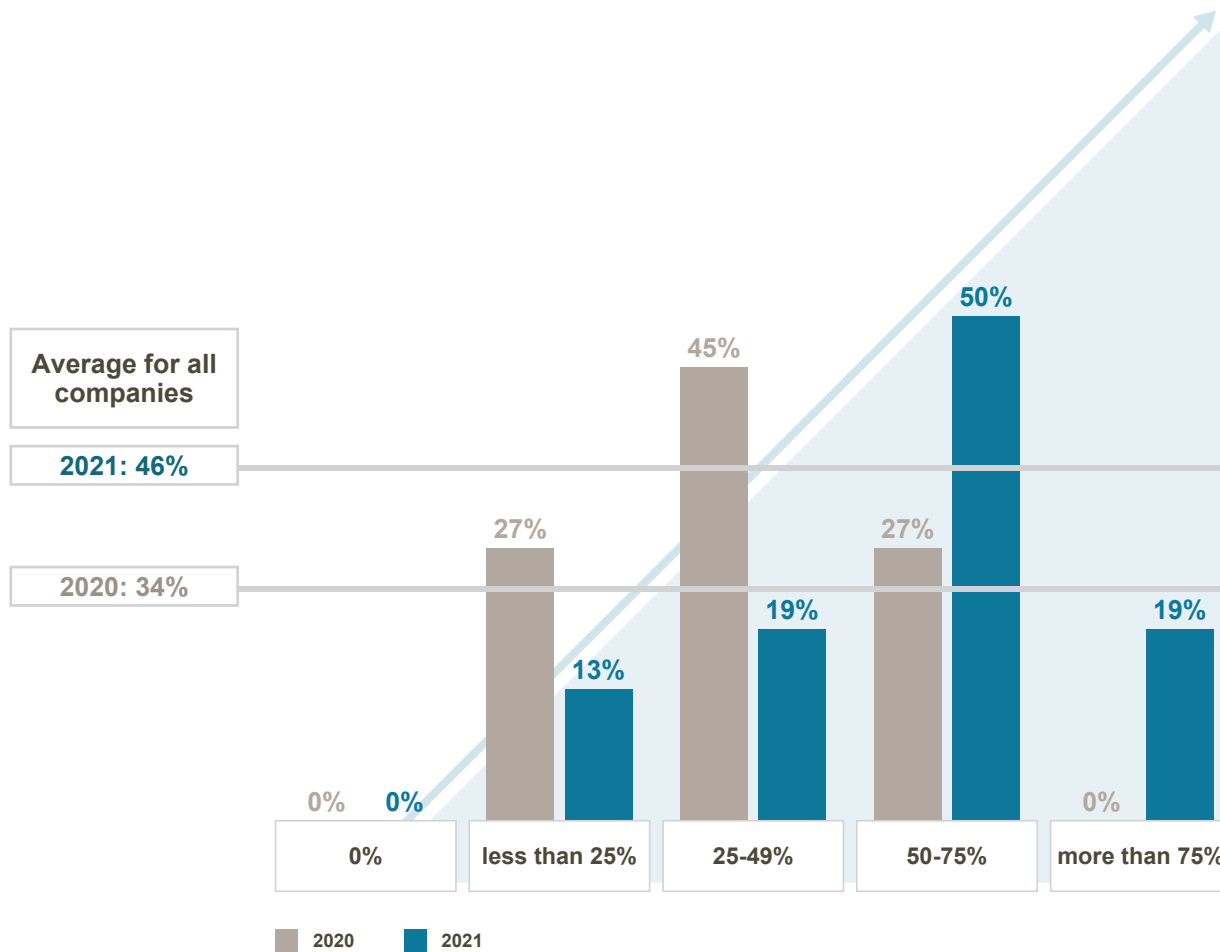


## What do you believe would most help the “bounce back” of exhibitions?

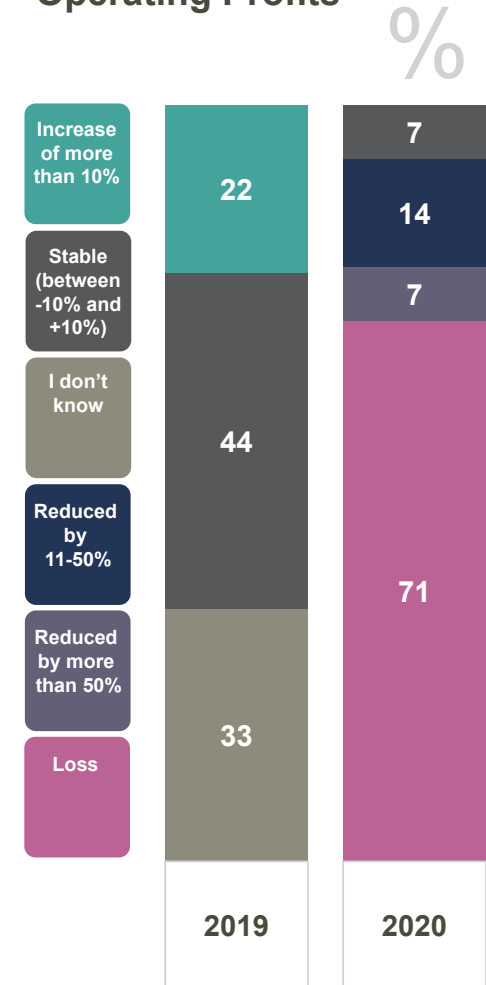




## Revenue compared to 2019

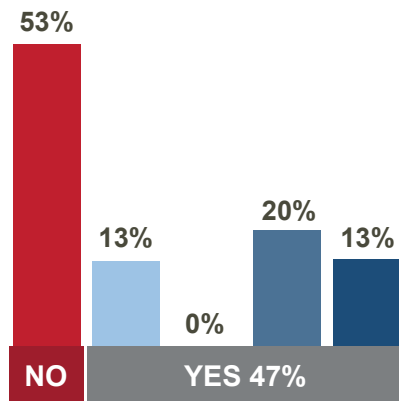


## Operating Profits

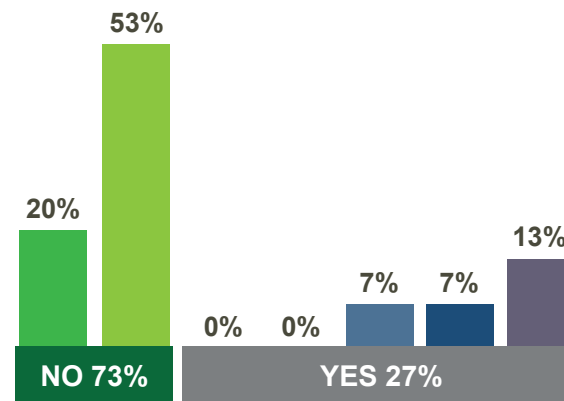




## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

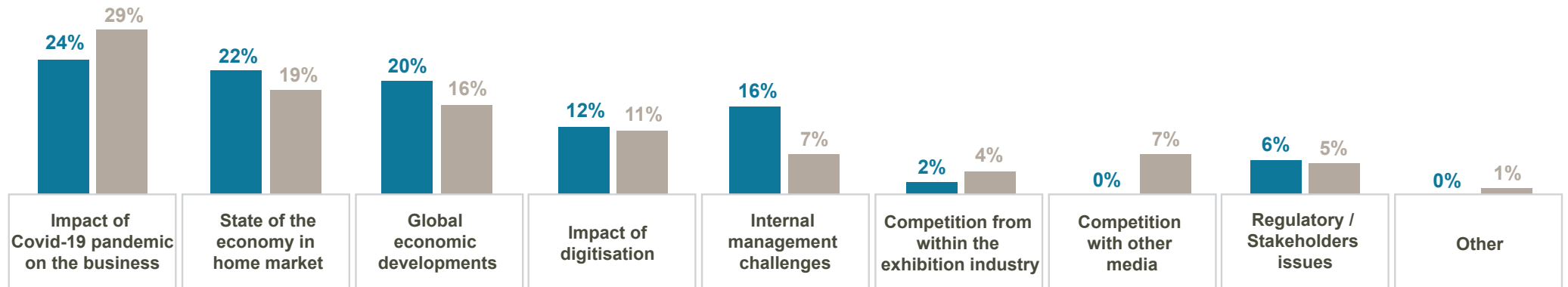
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for Spain



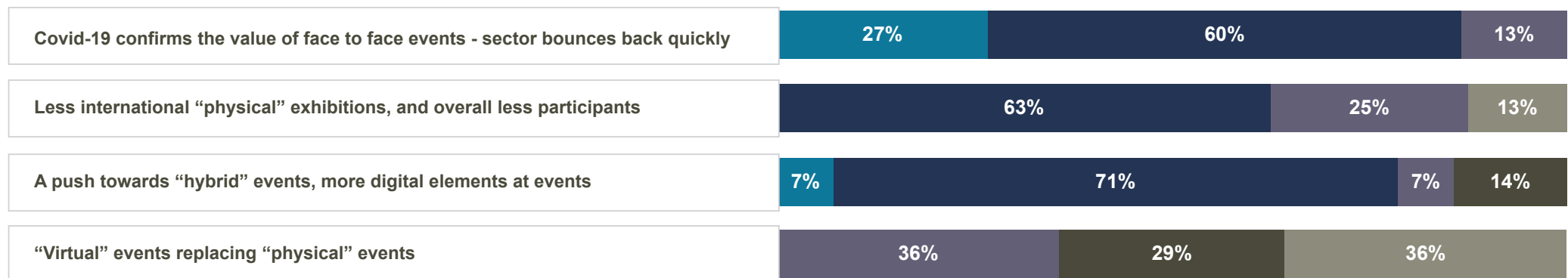
## Most important business issues in the exhibition industry

Spain Global



## Format of exhibitions in the coming years

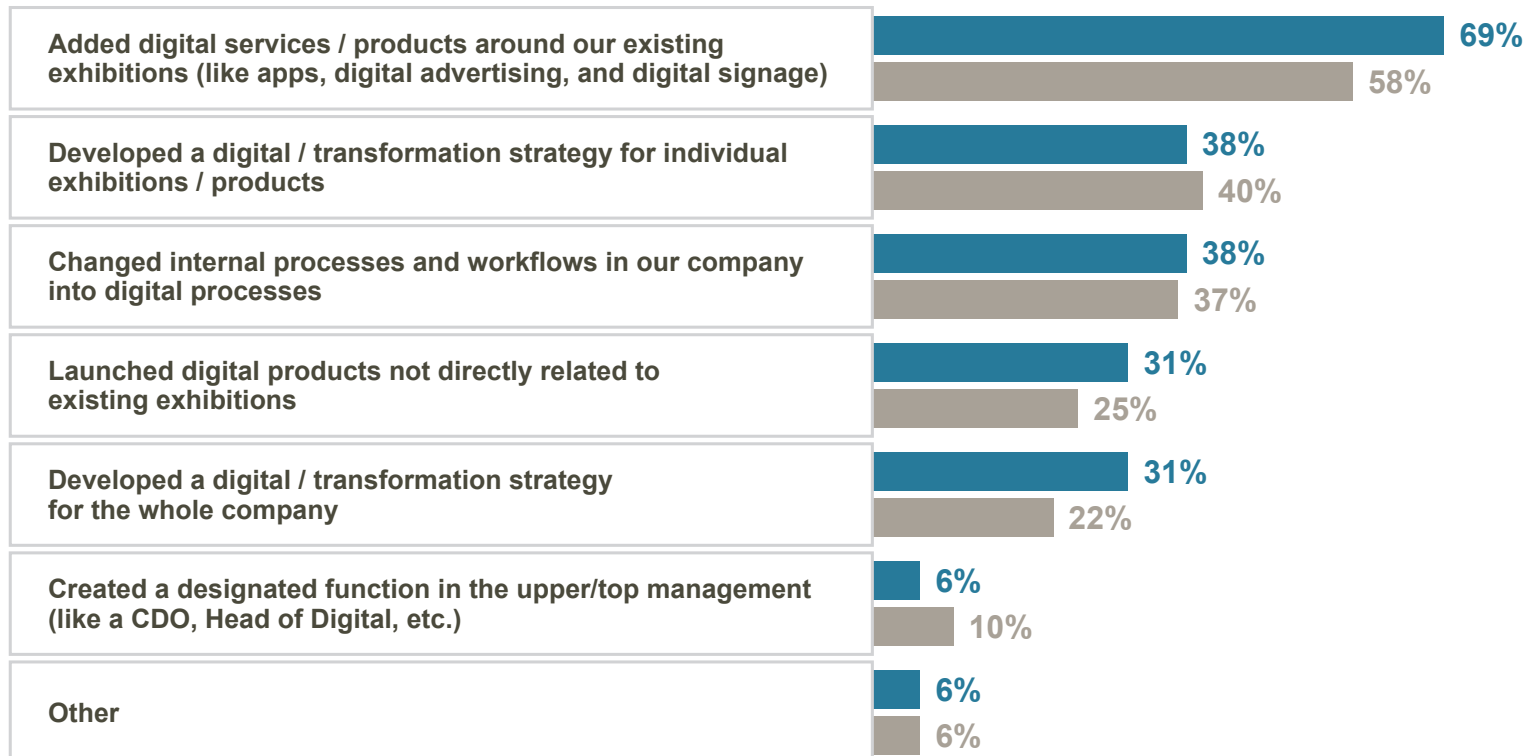
Yes, for sure Most probably Not sure Not sure at all Definitely not





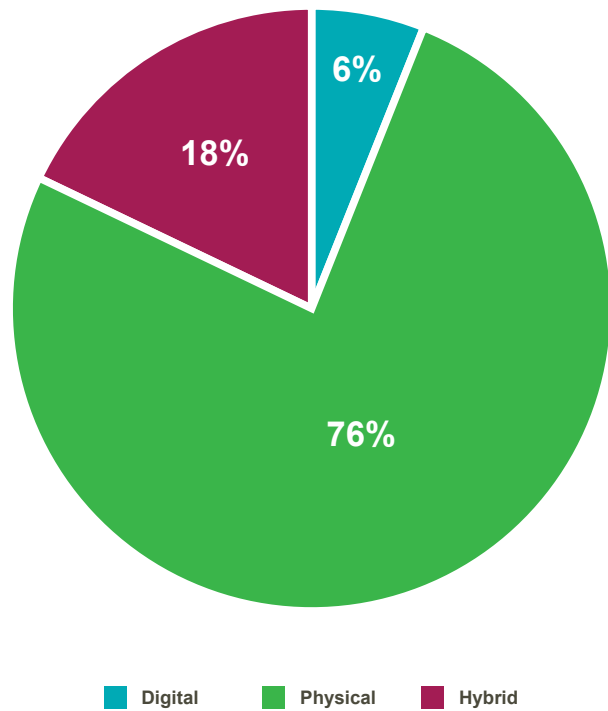
Spain Global

## Digitisation: implementation in Spain and globally

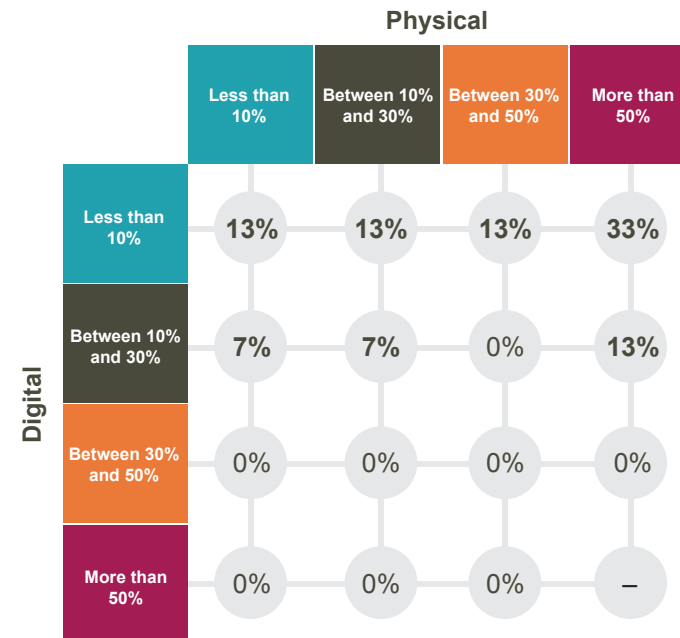




## Number of fairs projected in 2021

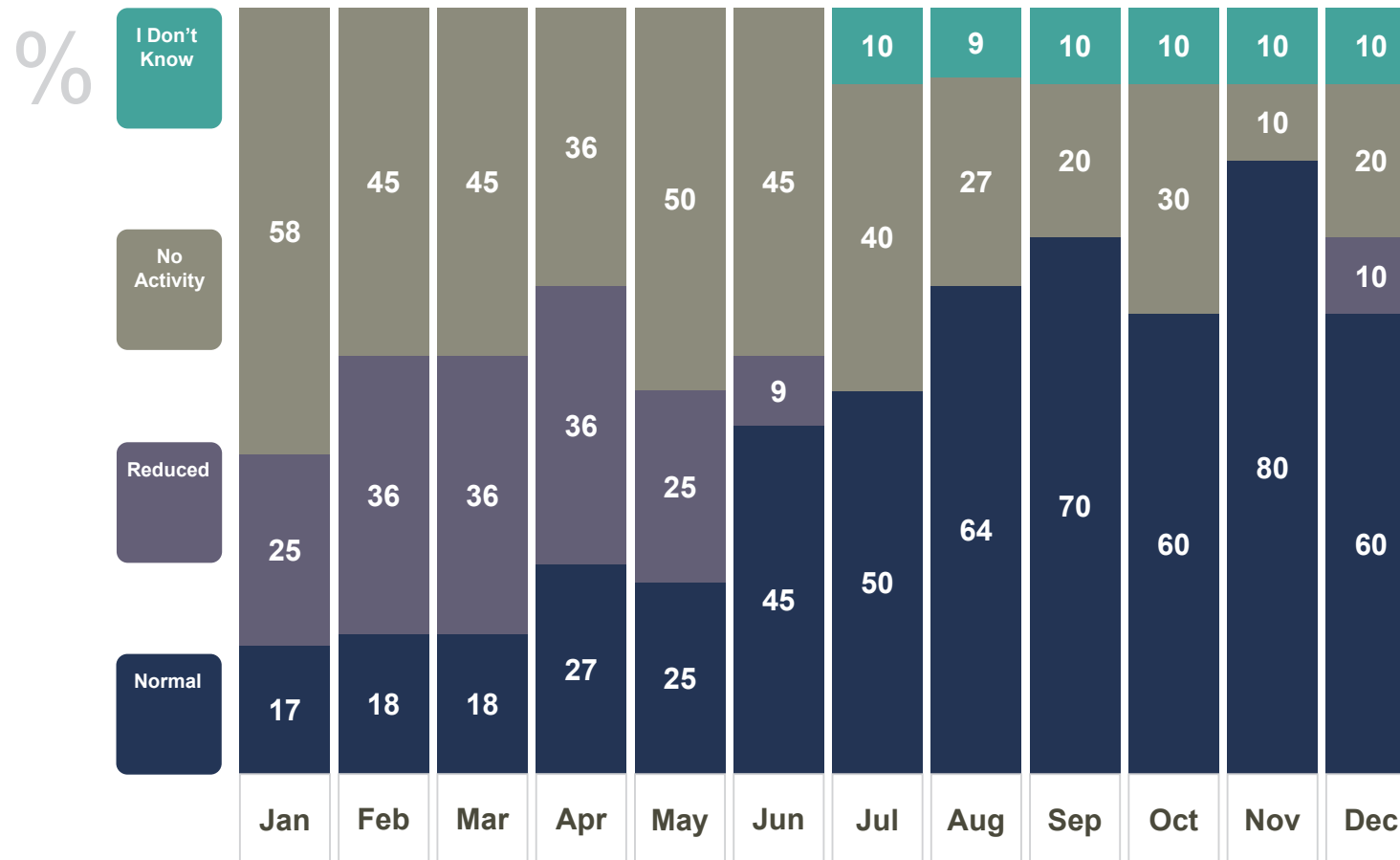


## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



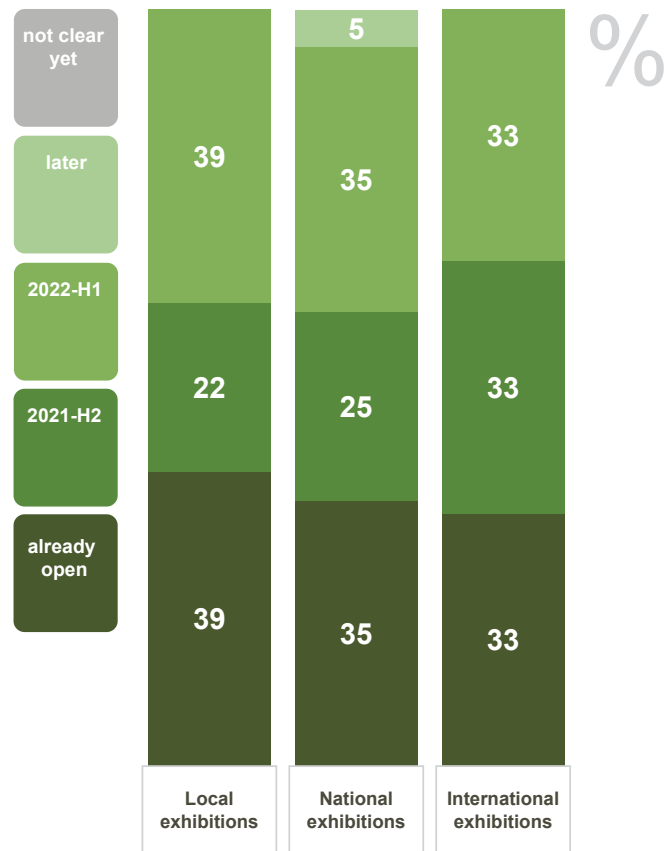


## Situation of industry operations in 2021

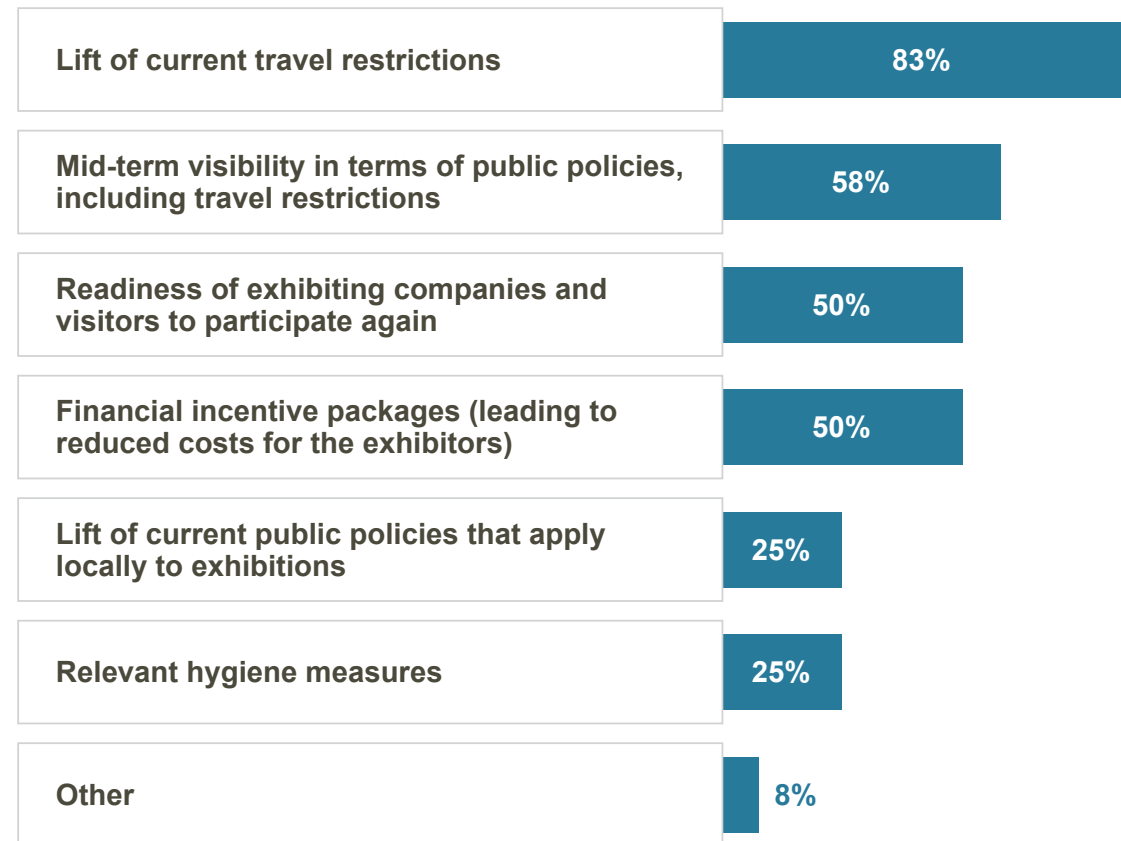




## When do you believe exhibitions will open again in your city?



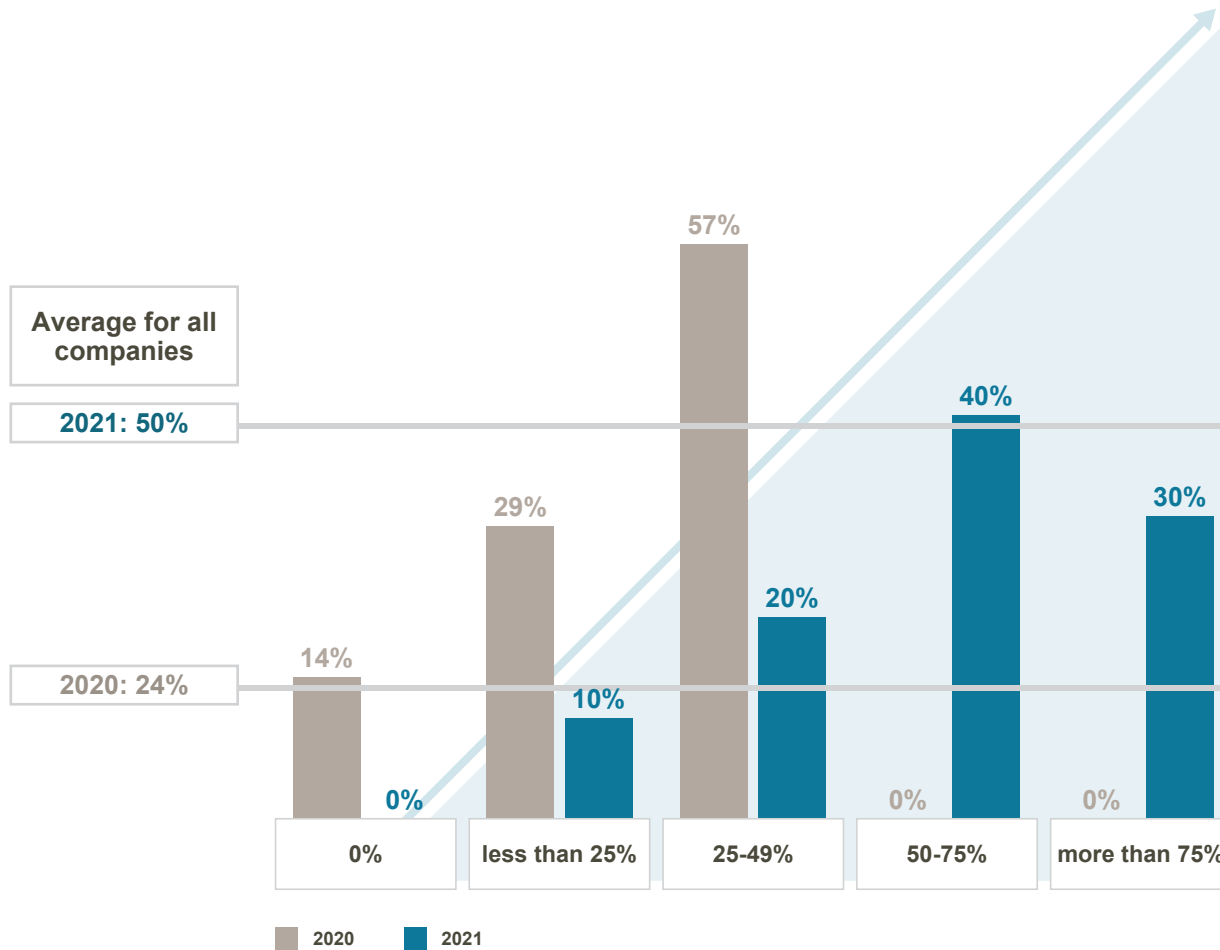
## What do you believe would most help the “bounce back” of exhibitions?



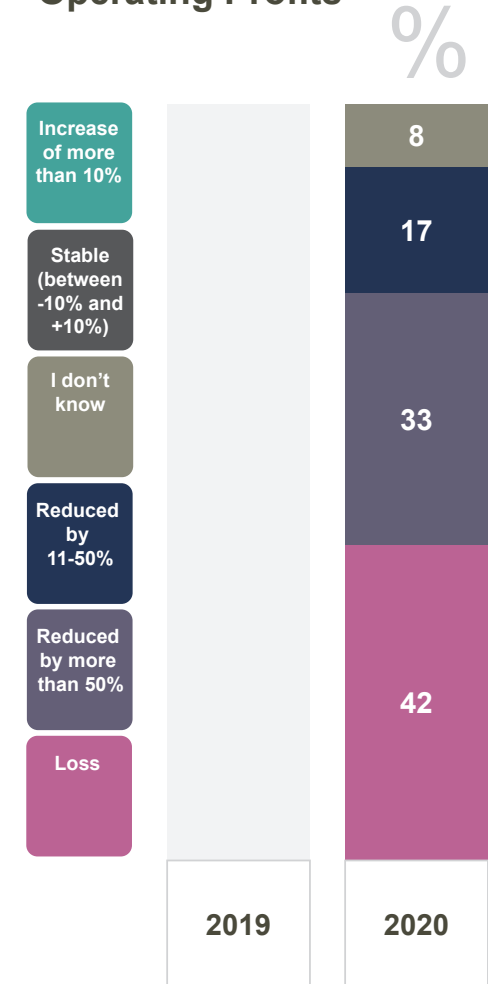




## Revenue compared to 2019

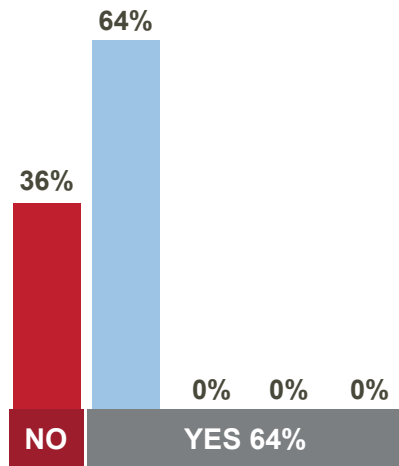


## Operating Profits

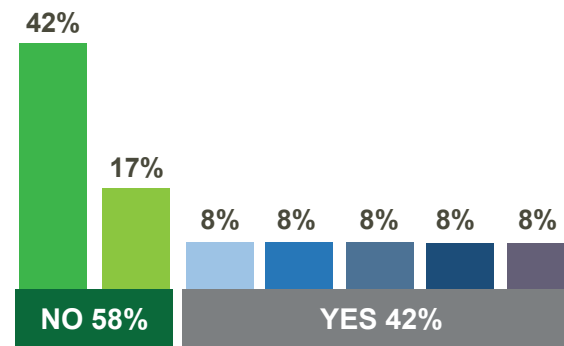




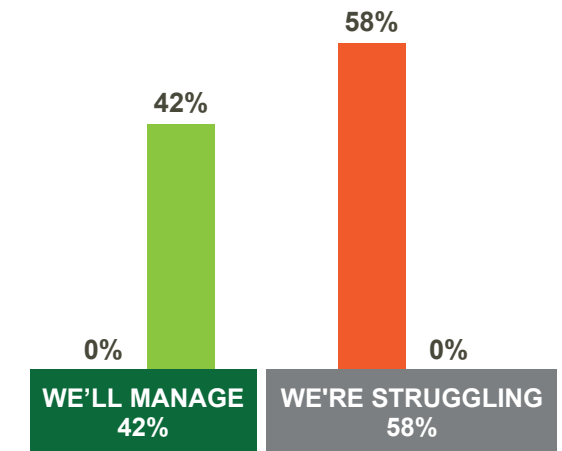
## Did your company benefit from public financial support?



## 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

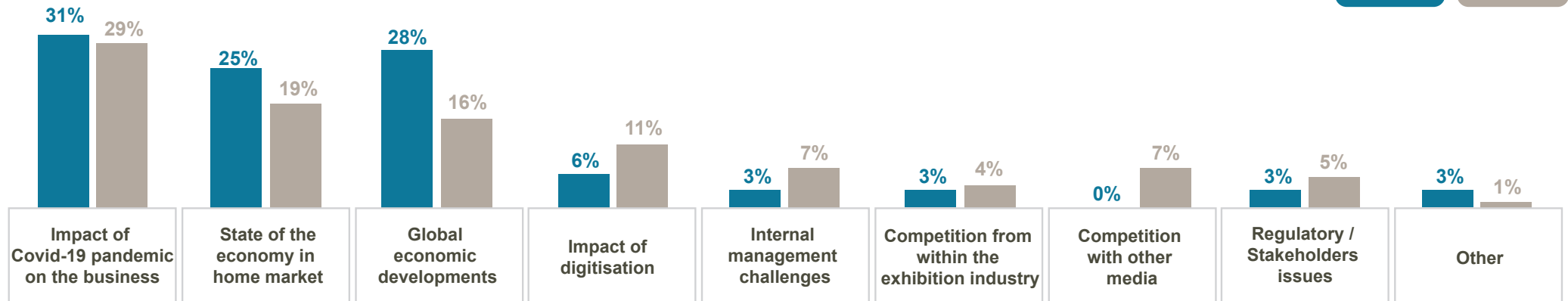
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



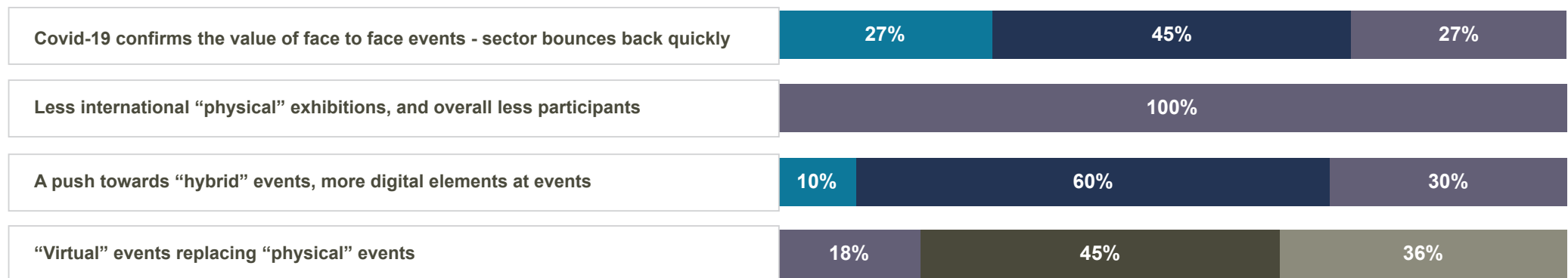
## Most important business issues in the exhibition industry

Turkey Global



## Format of exhibitions in the coming years

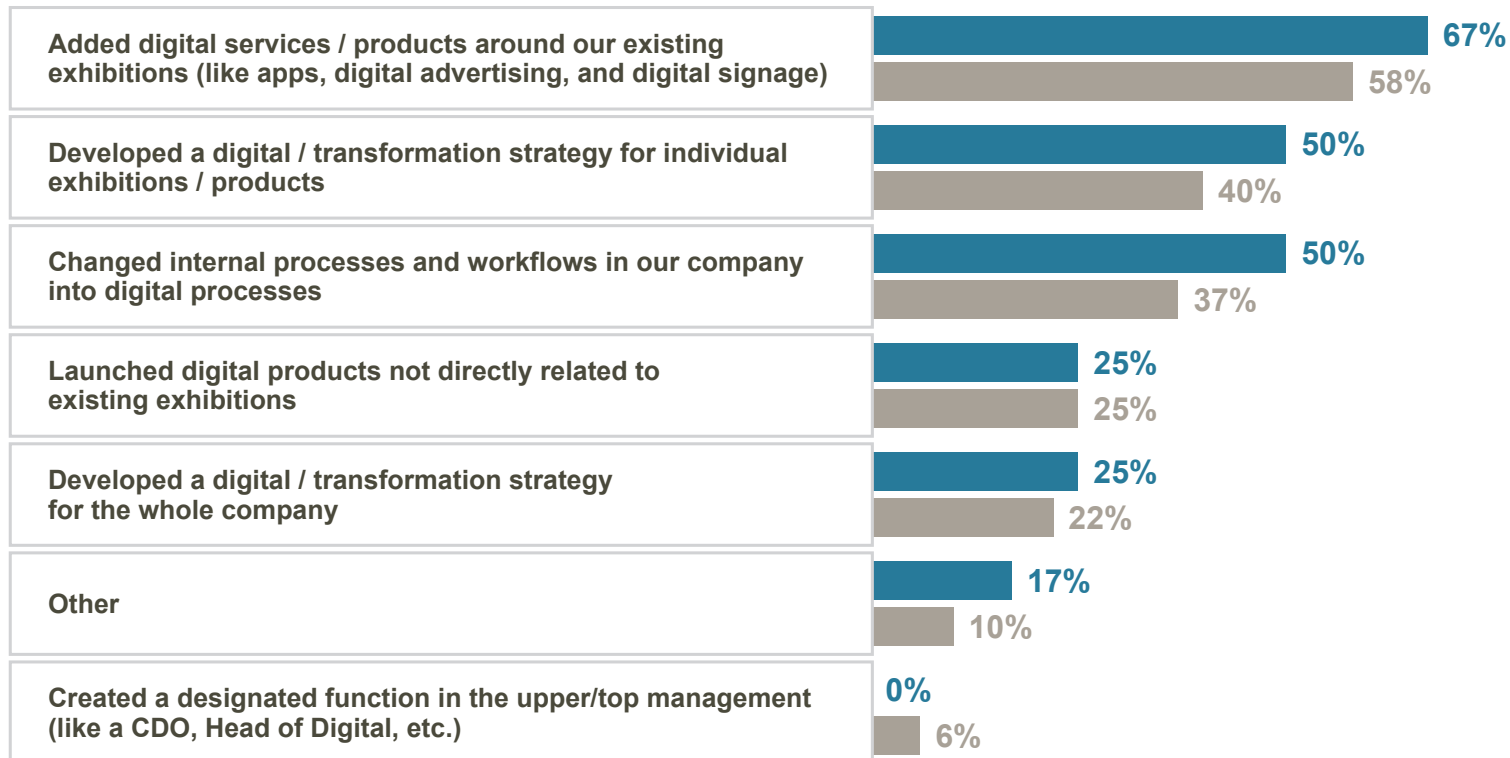
Yes, for sure Most probably Not sure Not sure at all Definitely not





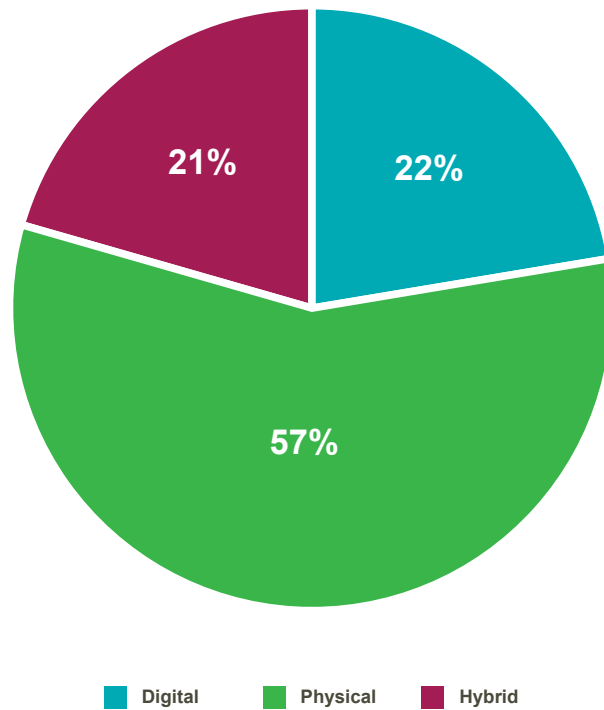
Turkey Global

## Digitisation: implementation in Turkey and globally

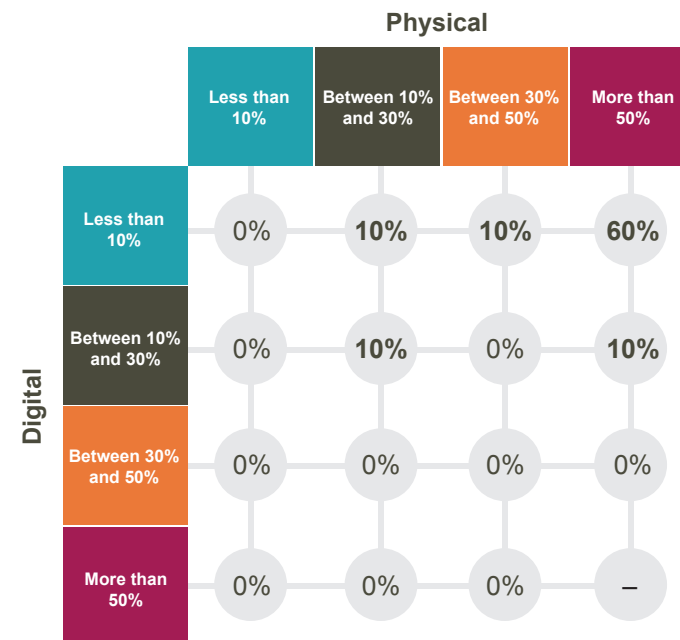




## Number of fairs projected in 2021

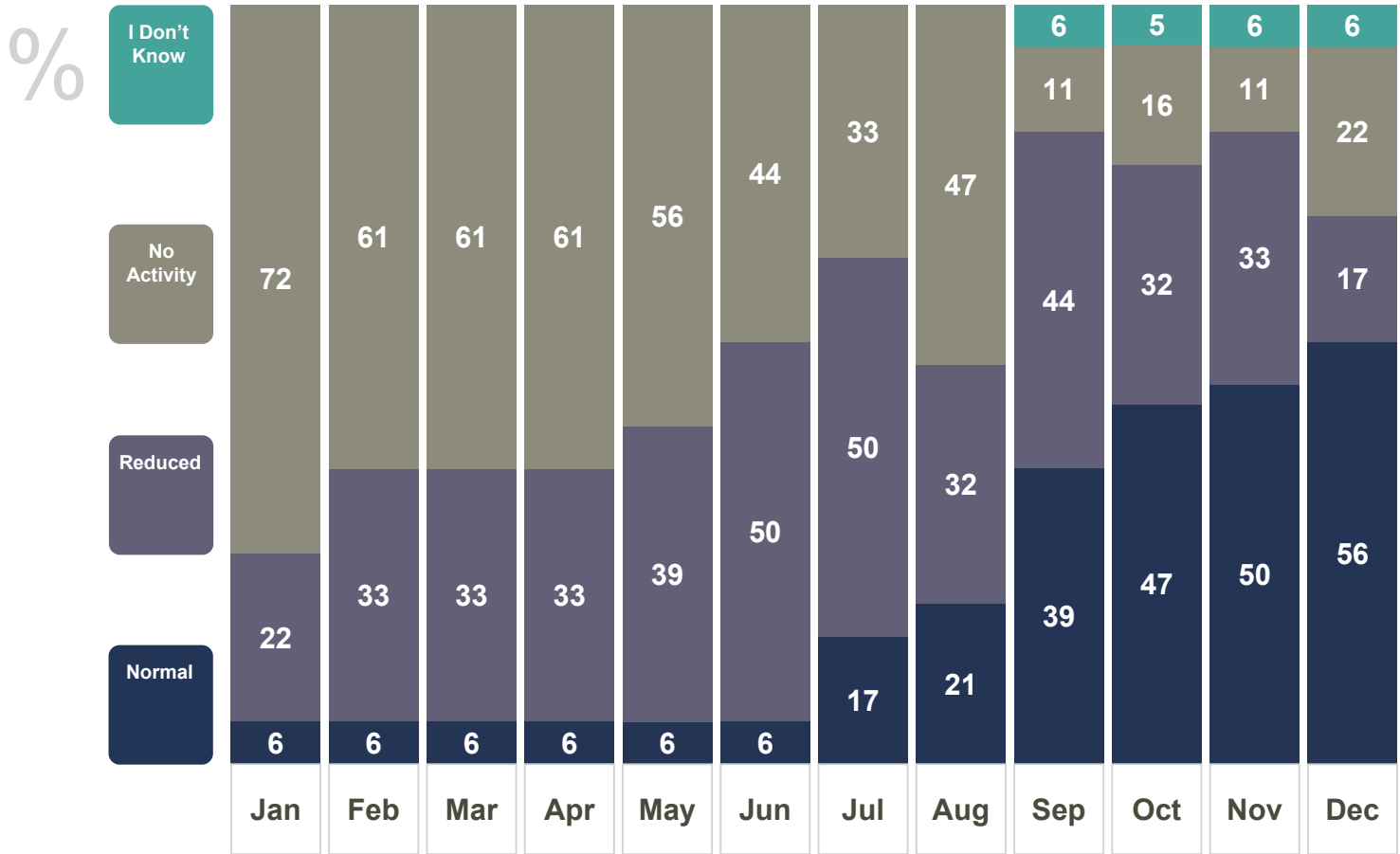


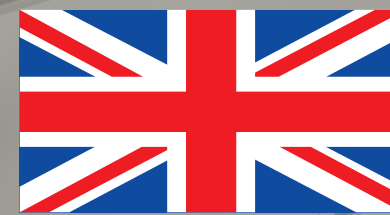
## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



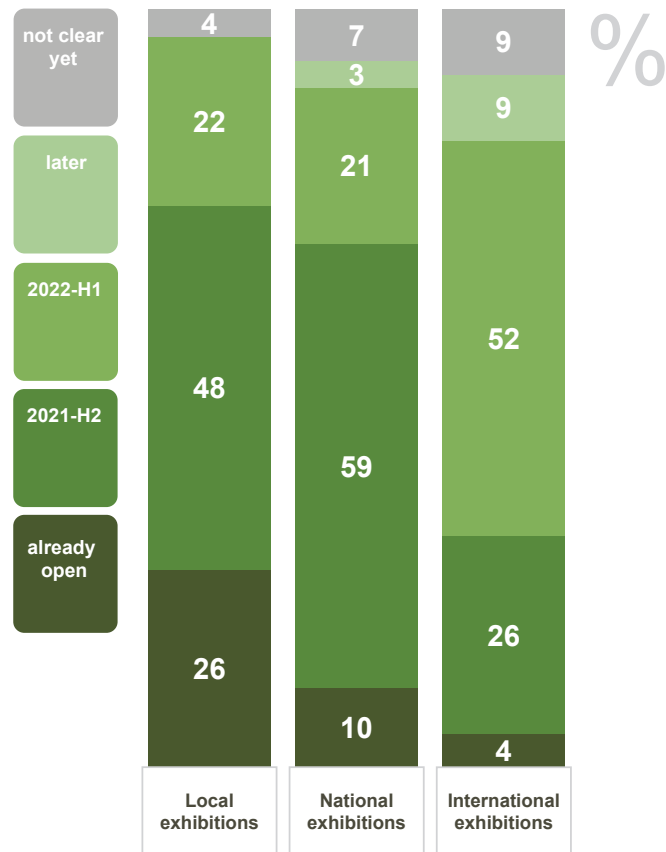


## Situation of industry operations in 2021

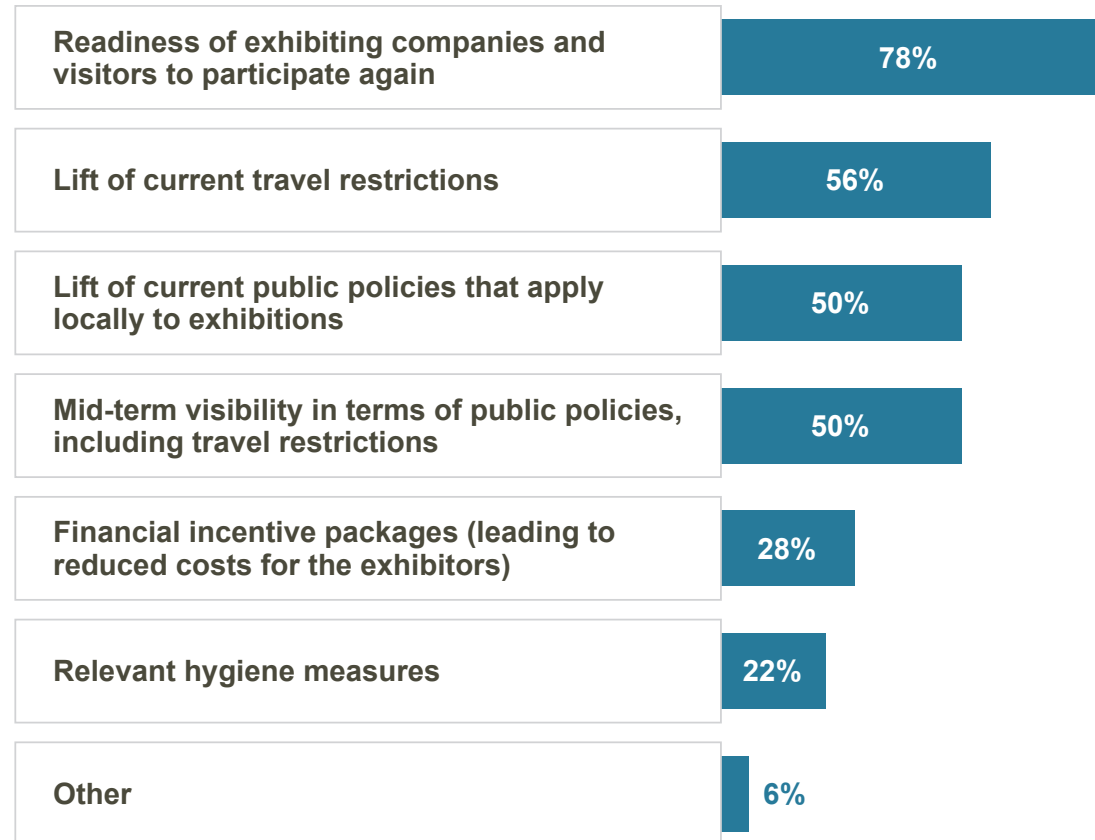


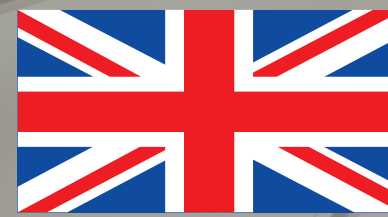


## When do you believe exhibitions will open again in your city?

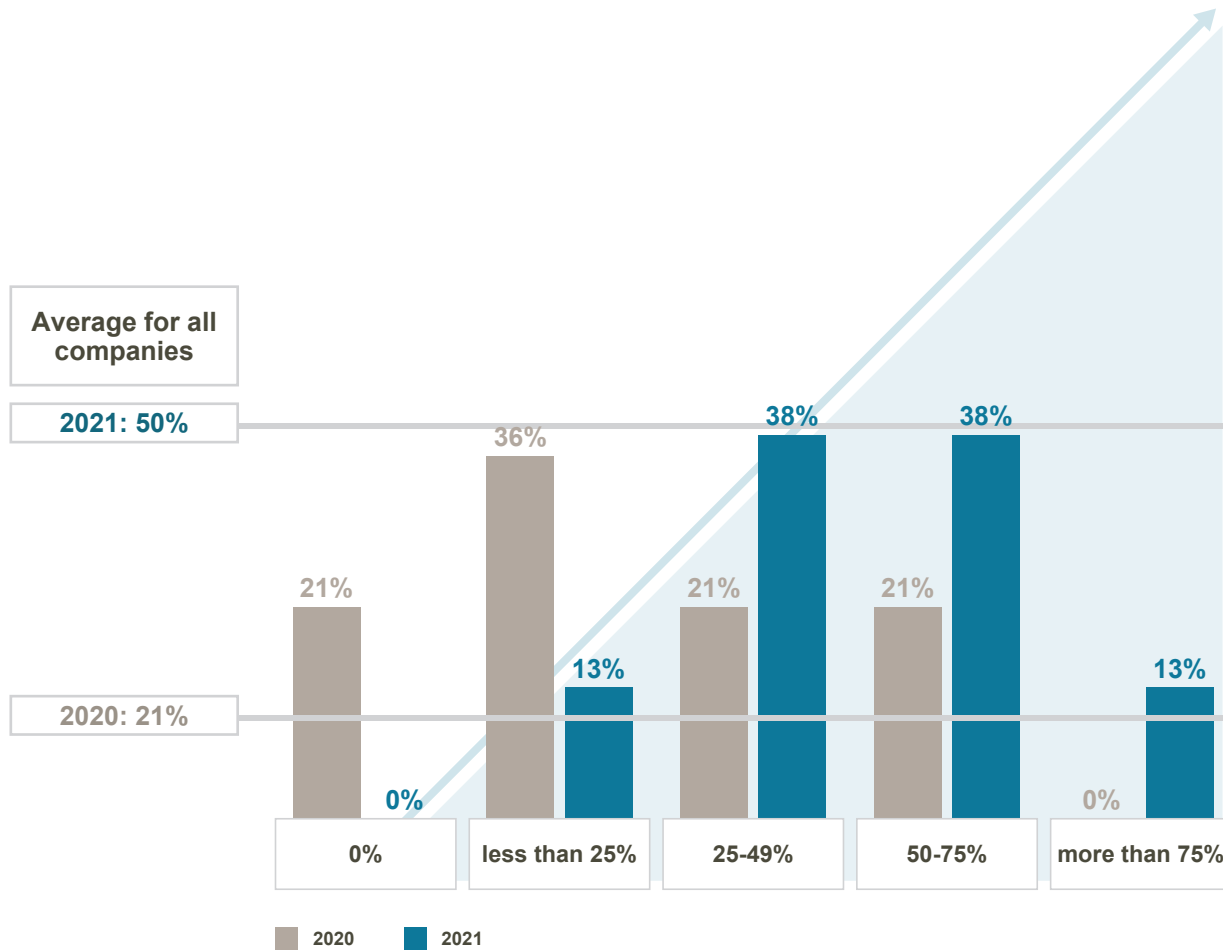


## What do you believe would most help the “bounce back” of exhibitions?

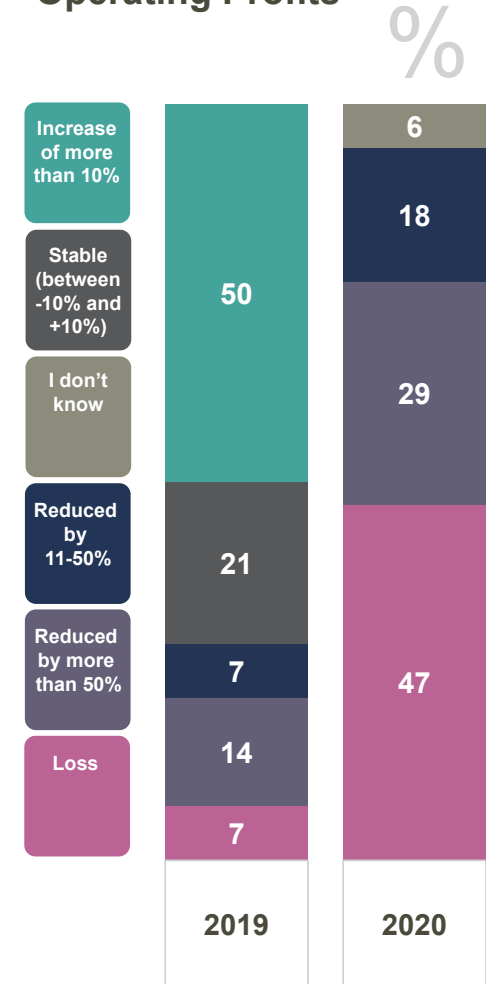




## Revenue compared to 2019



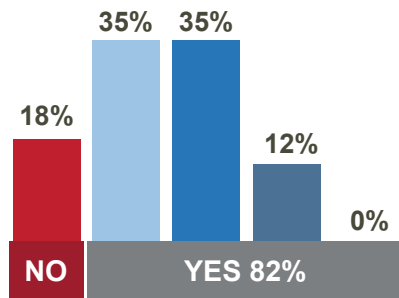
## Operating Profits



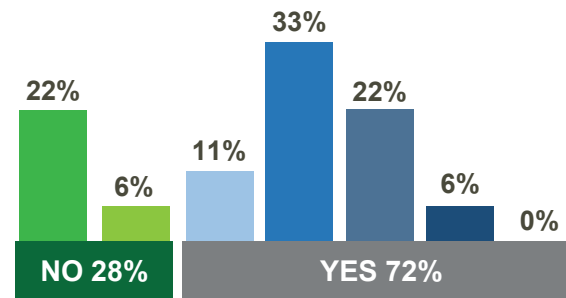




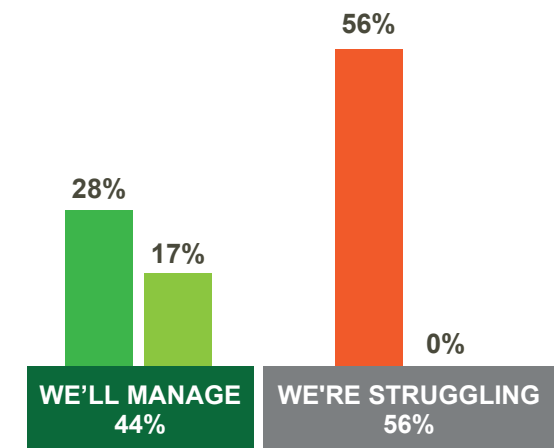
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

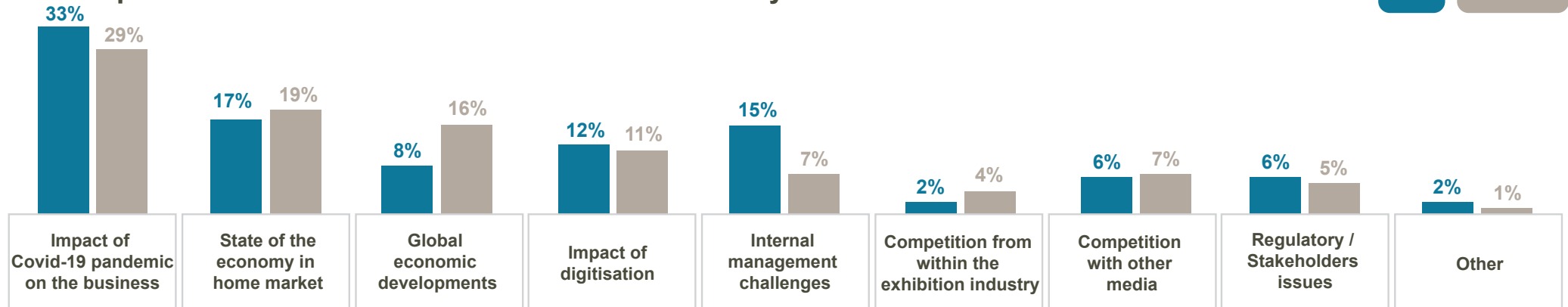
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



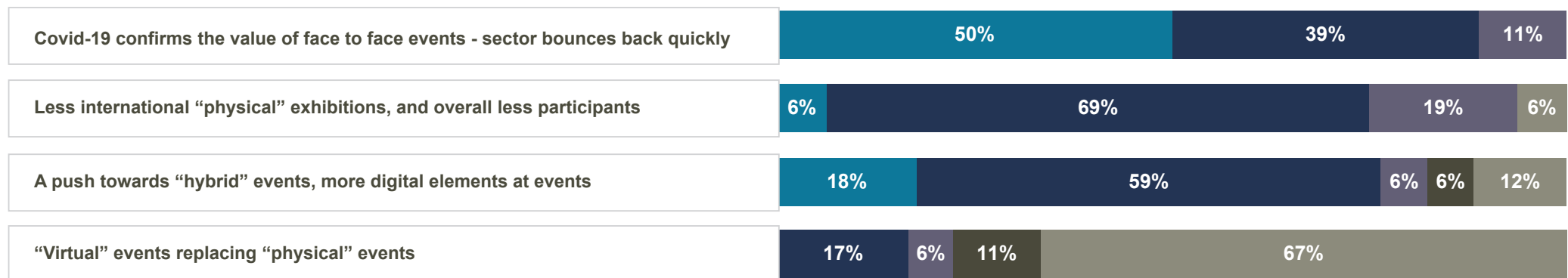
## Most important business issues in the exhibition industry

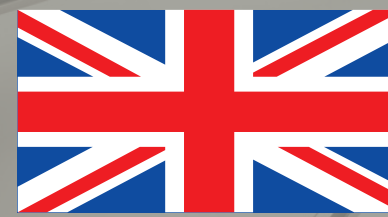
UK Global



## Format of exhibitions in the coming years

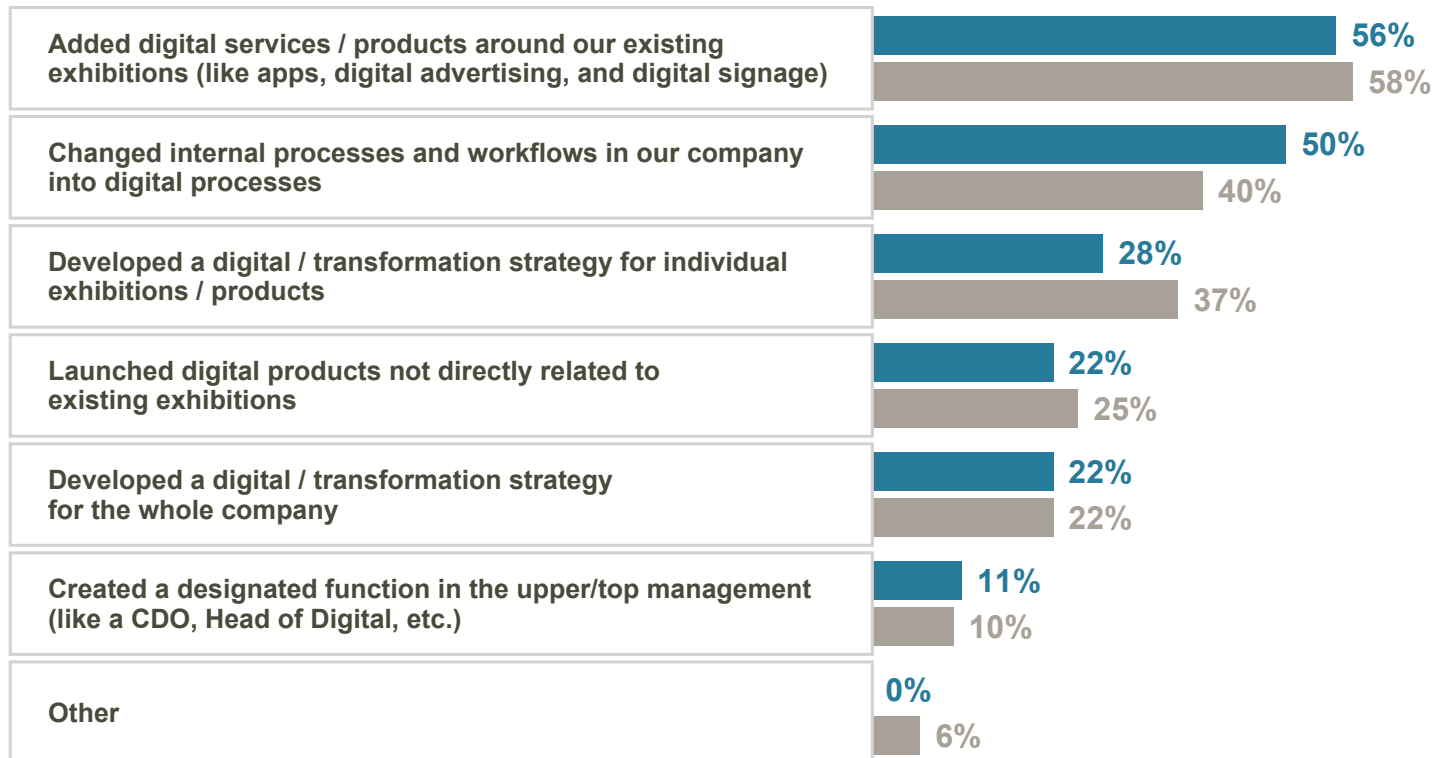
Yes, for sure Most probably Not sure Not sure at all Definitely not

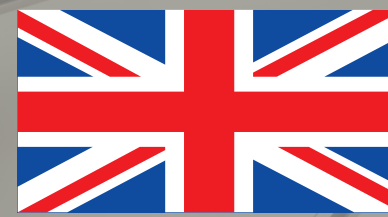




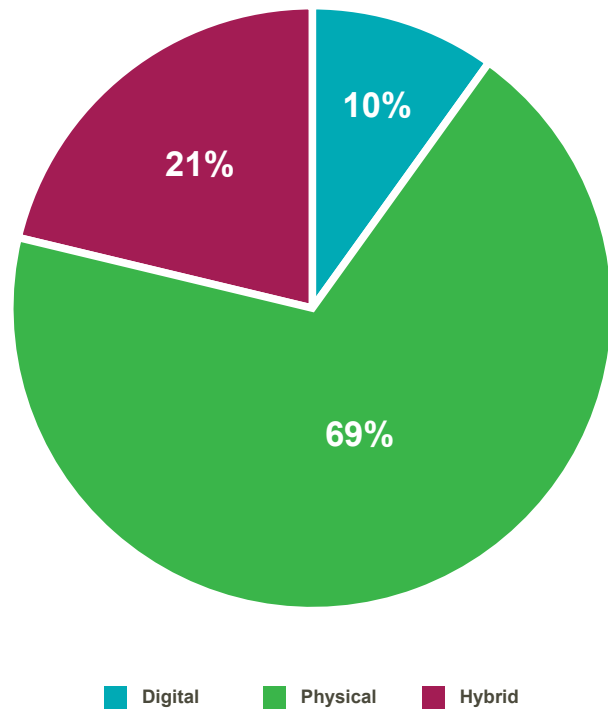
UK Global

## Digitisation: implementation in UK and globally

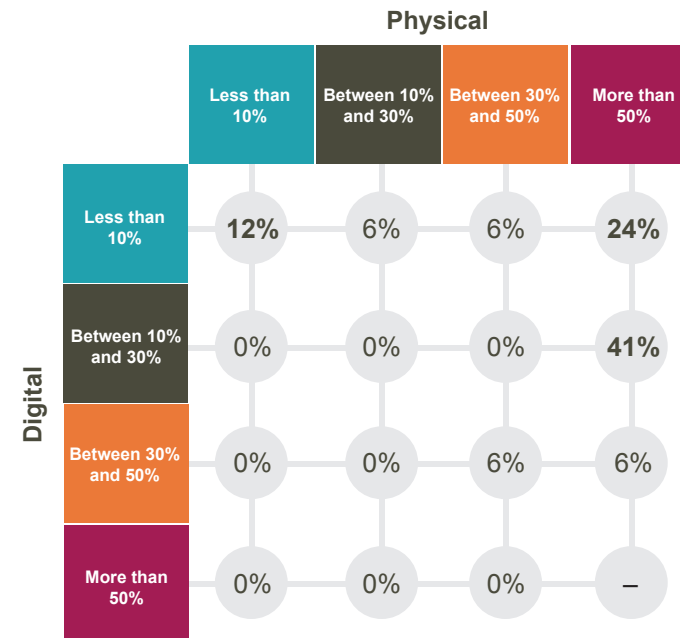




## Number of fairs projected in 2021



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



# Middle East & Africa



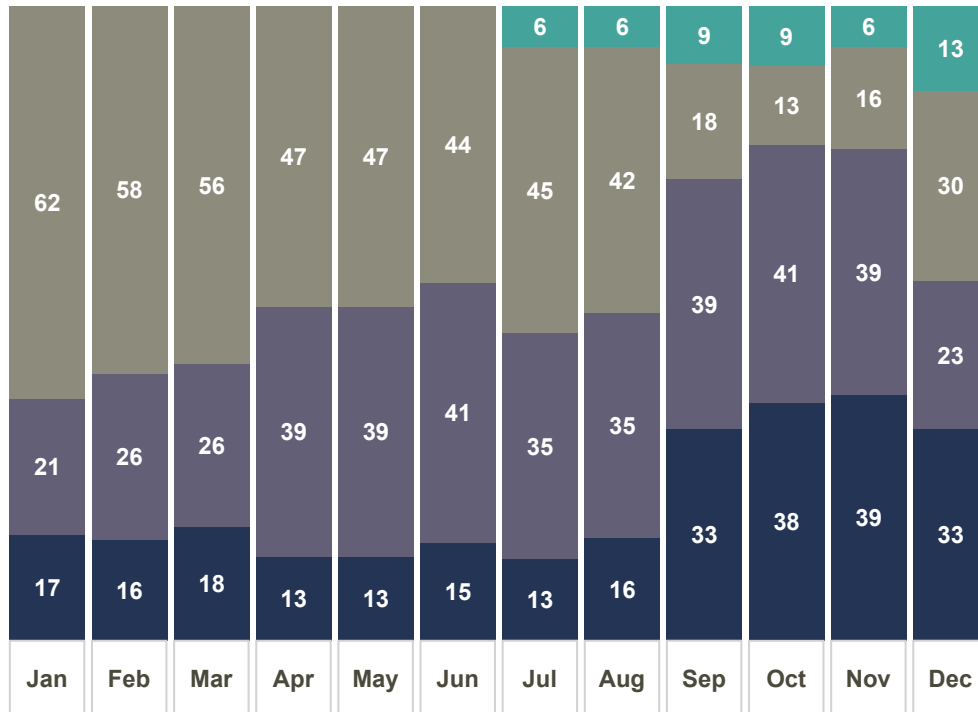
# Operations - Reopening Exhibitions Middle East & Africa



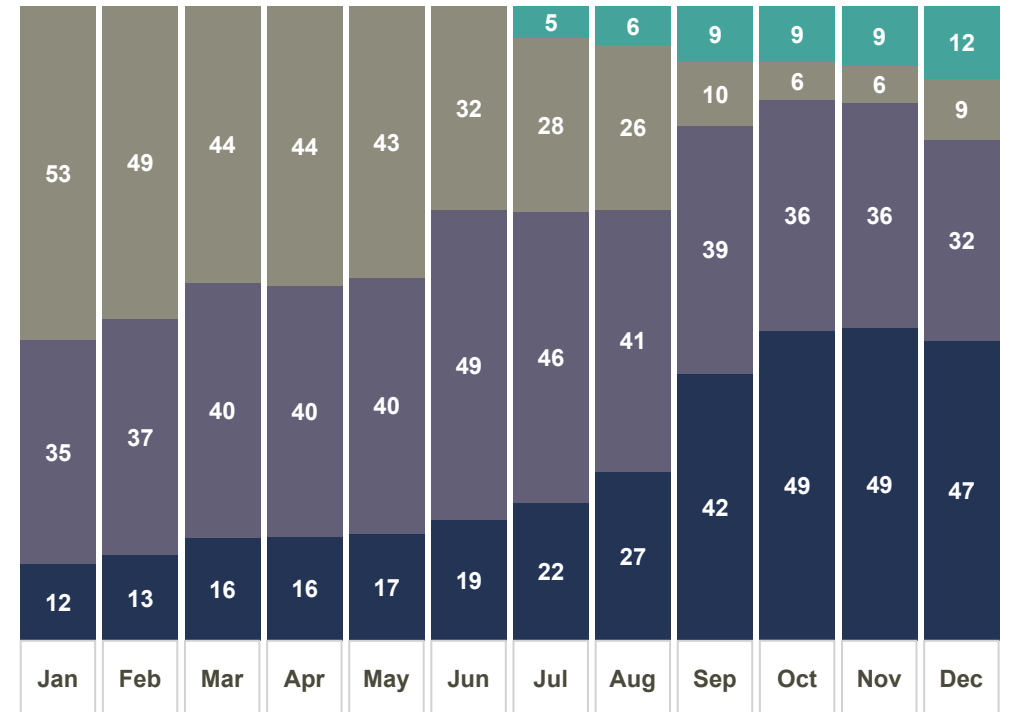
## Situation of industry operations in 2021



### Middle East & Africa



### World



# Operations - Reopening Exhibitions Middle East & Africa

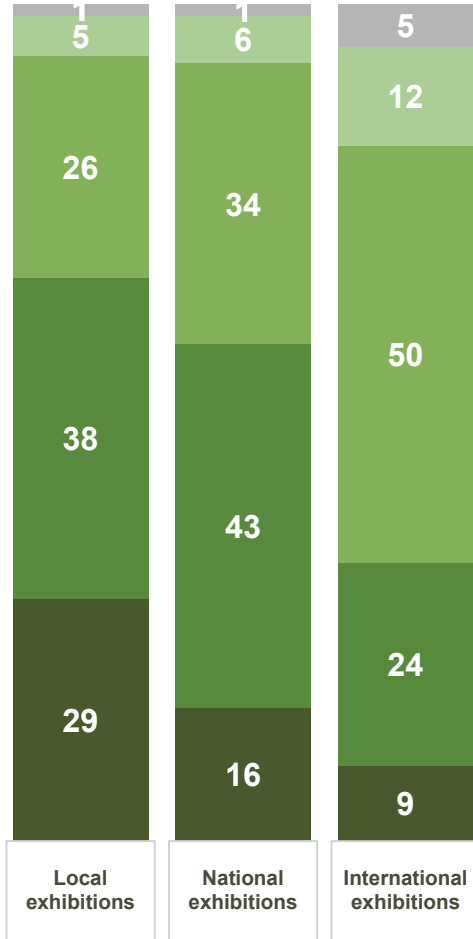
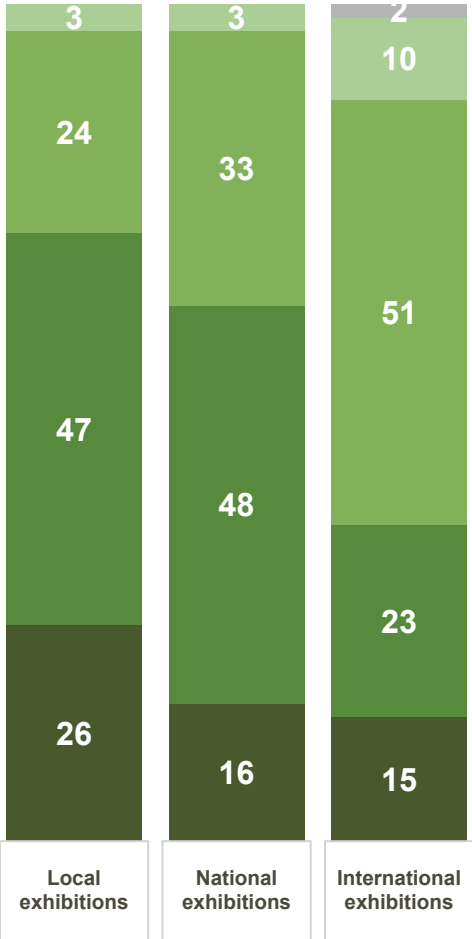


When do you believe exhibitions will open again in your city?

## Middle East & Africa

## World

- not clear yet
- later
- 2022-H1
- 2021-H2
- already open

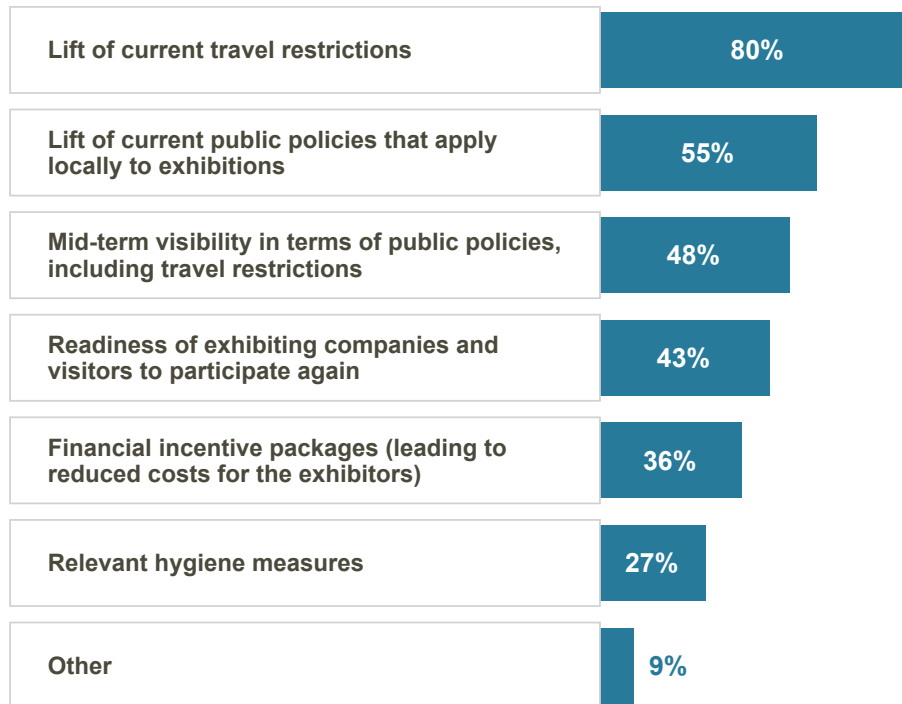


%

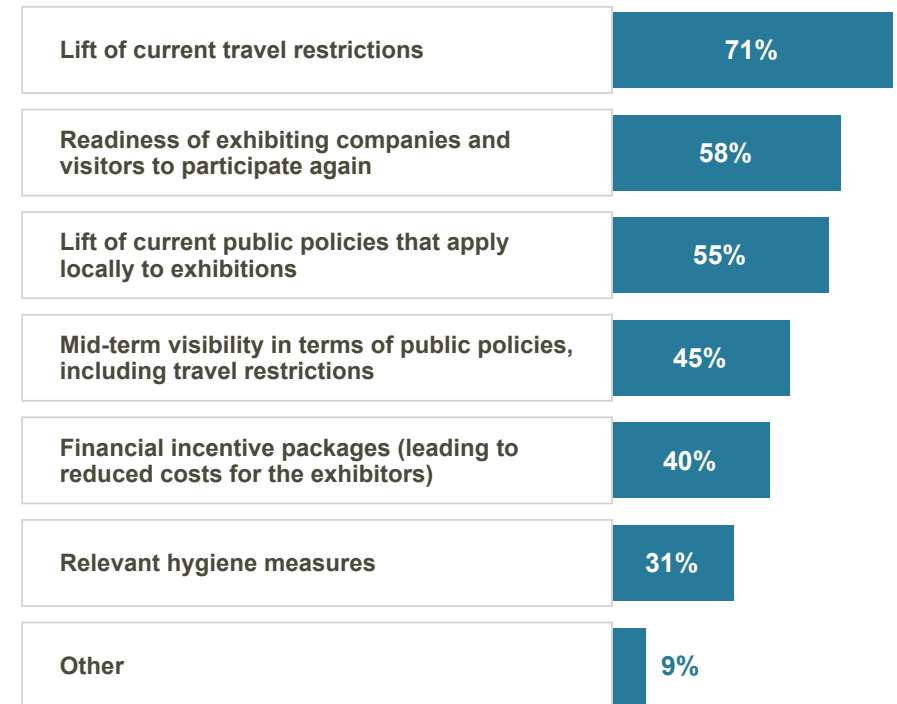


## What do you believe would most help the “bounce back” of exhibitions?

### Middle East & Africa



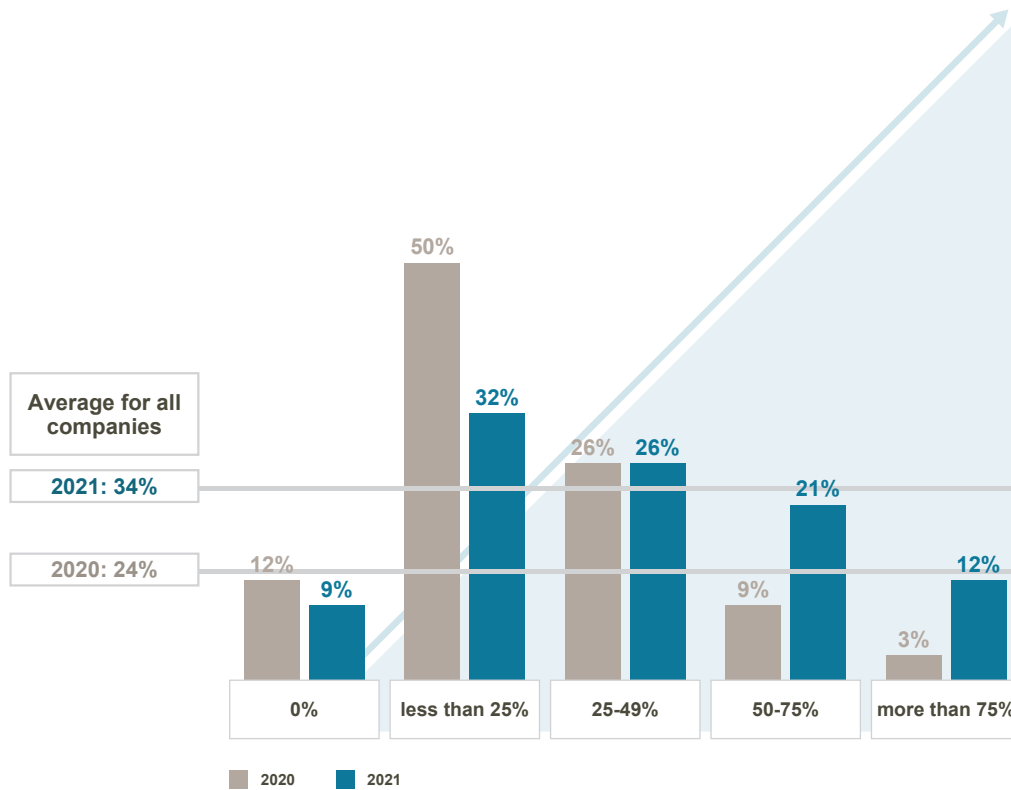
### World



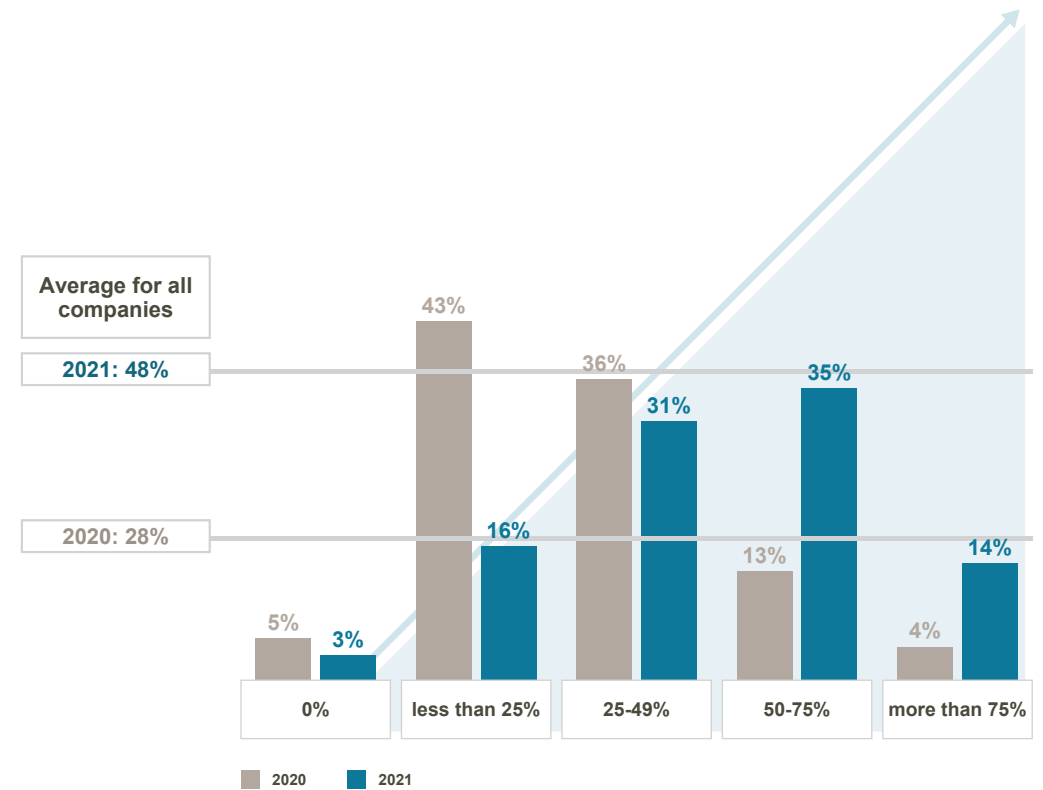




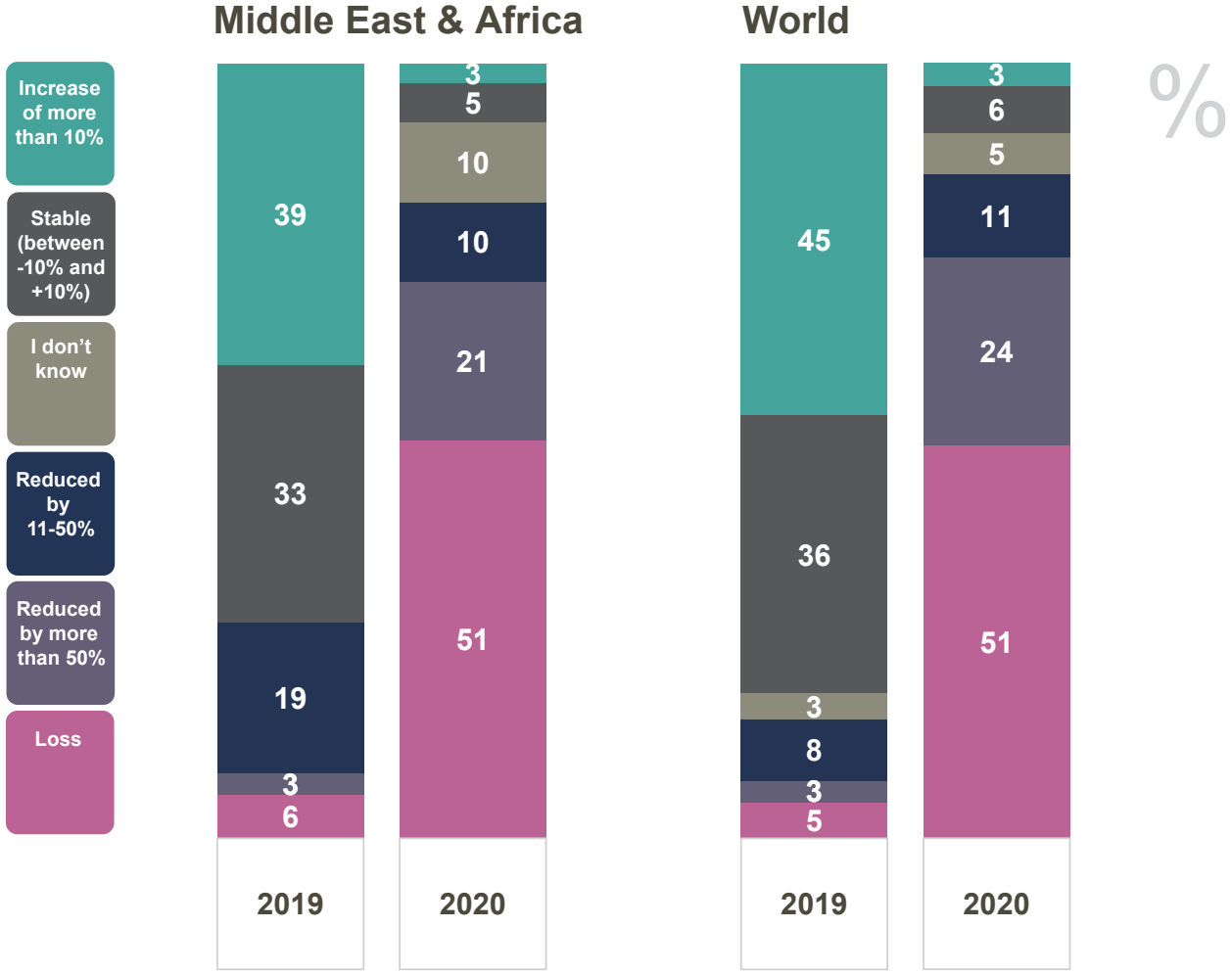
## Revenue compared to 2019 Middle East & Africa



## World



# Operating profits Middle East & Africa

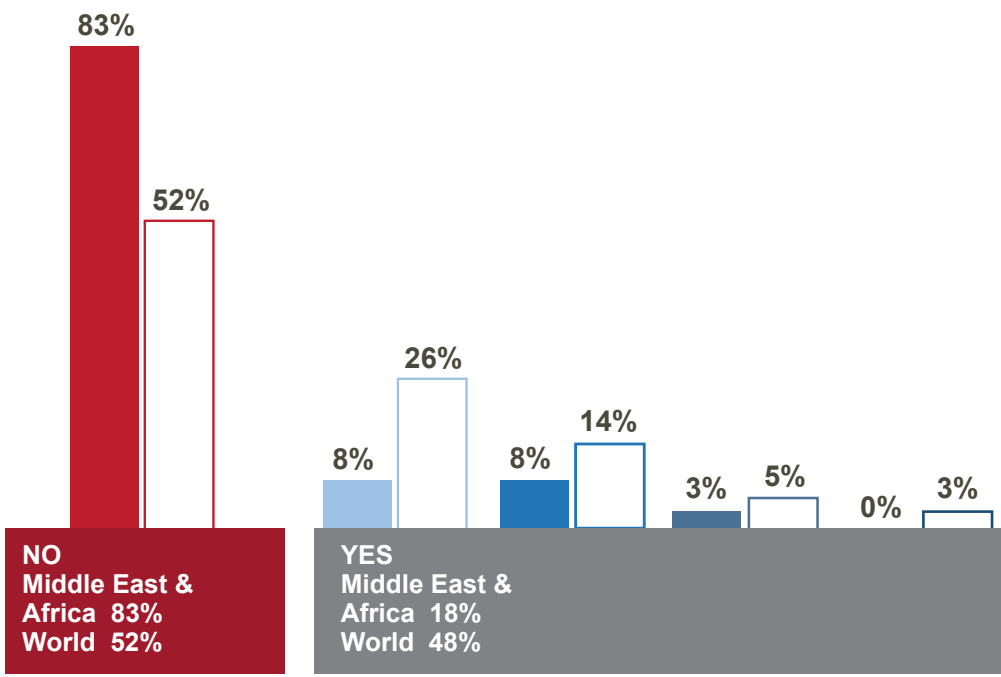




## Did your company benefit from public financial support?

**Middle East & Africa**    World

- 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



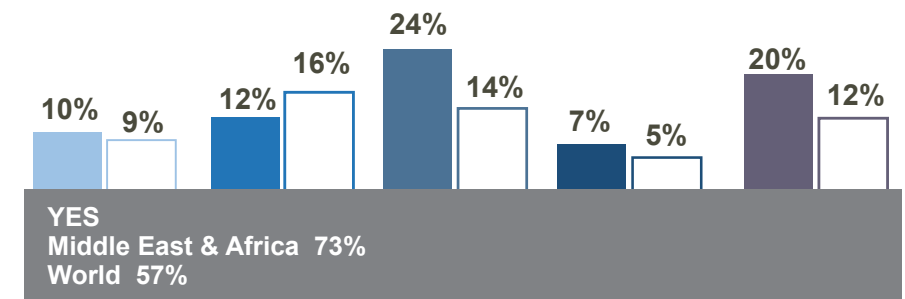
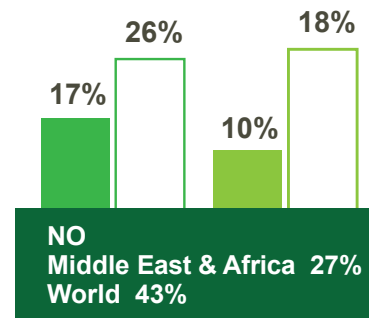


## Have you had to reduce your workforce?

**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

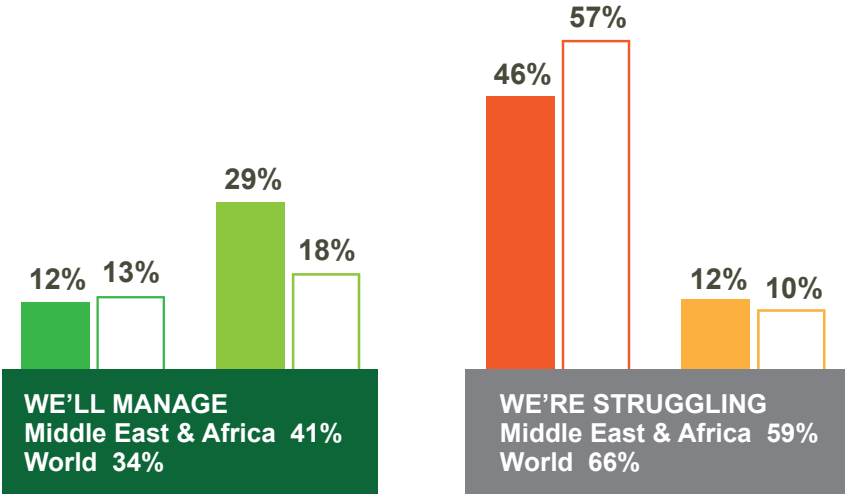




## If there is no business for the next 6 months, which best applies?

**Middle East & Africa**    World

- 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

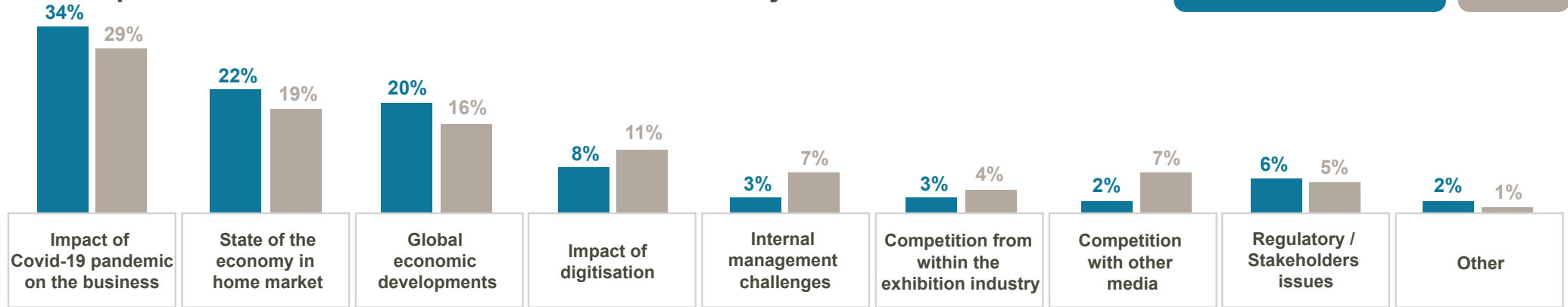


# Most Important Business Issues - Format of Exhibitions - Middle East & Africa



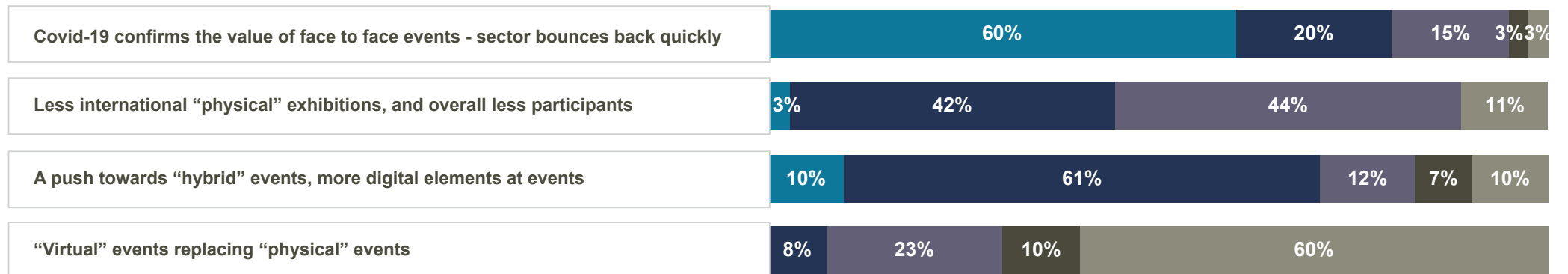
## Most important business issues in the exhibition industry

Middle East & Africa Global



## Format of exhibitions in the coming years

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

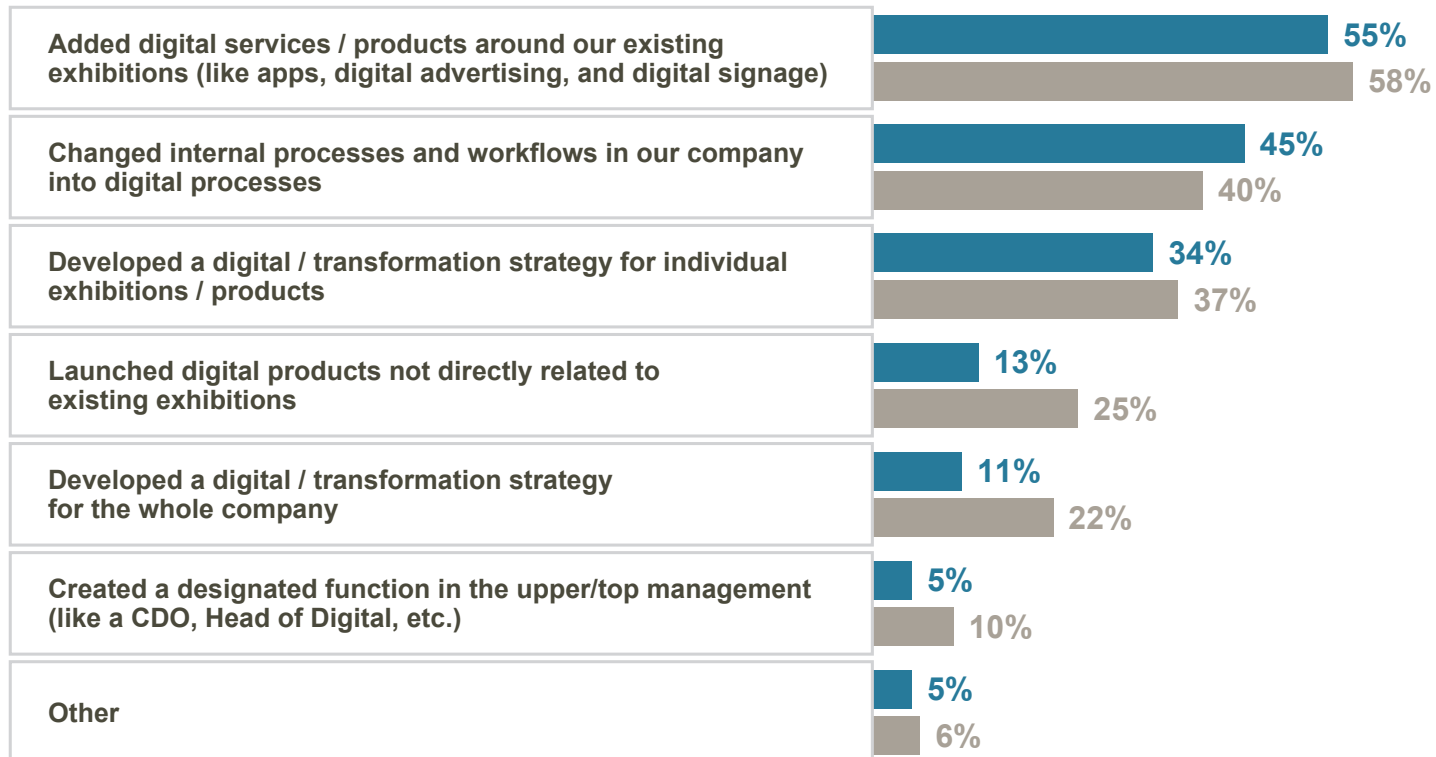




Middle East & Africa

Global

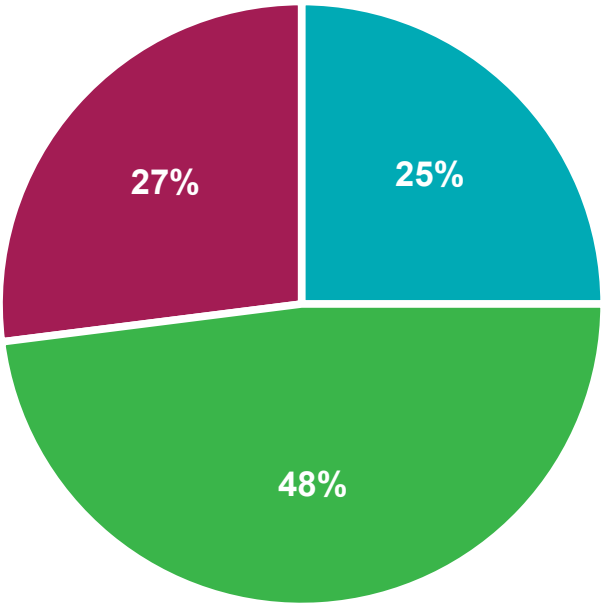
## Digitisation: implementation in Middle East & Africa and globally



# Number of fairs projected in 2021 Middle East & Africa

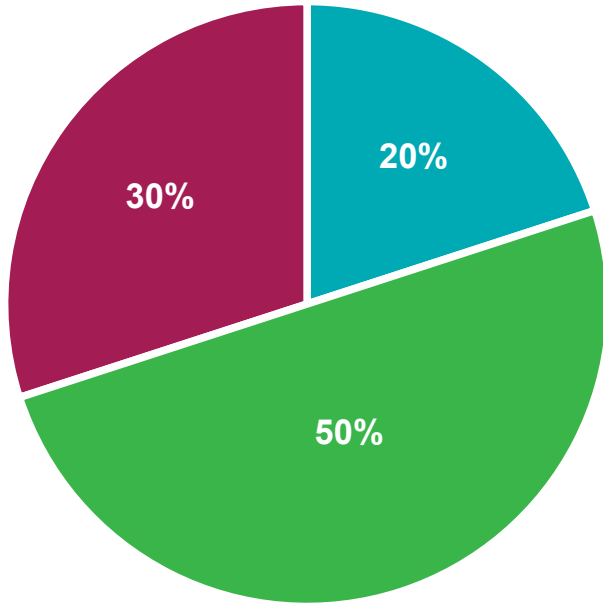


**Middle East & Africa**



■ Digital ■ Physical ■ Hybrid

**World**



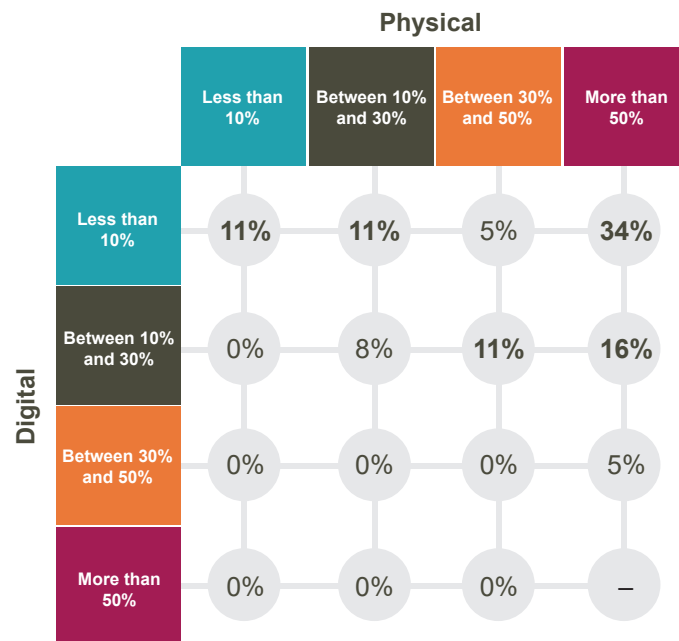
■ Digital ■ Physical ■ Hybrid



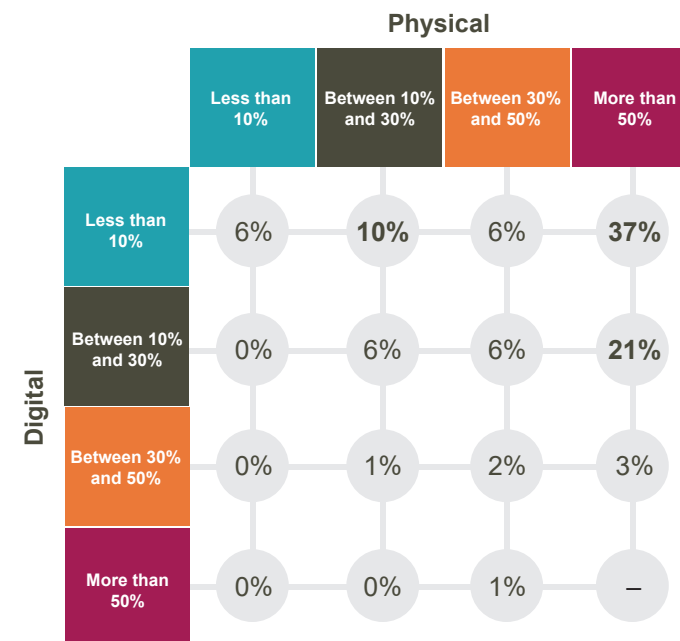
# Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



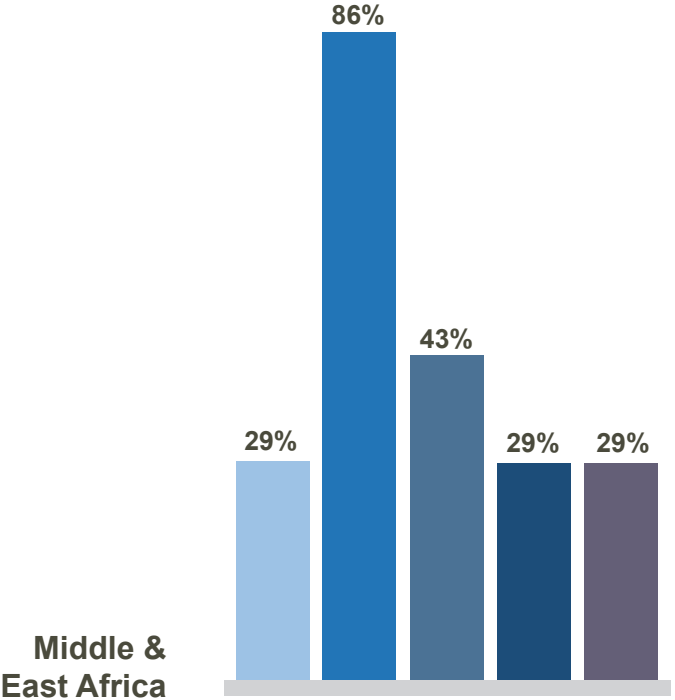
## Middle East & Africa



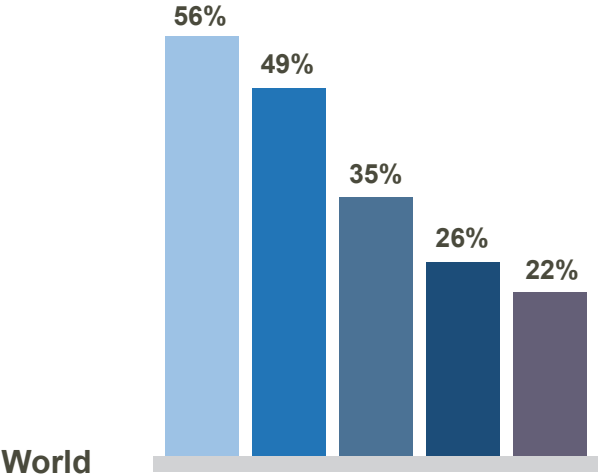
## World



# Expanded activities (for venues only) Middle East & Africa



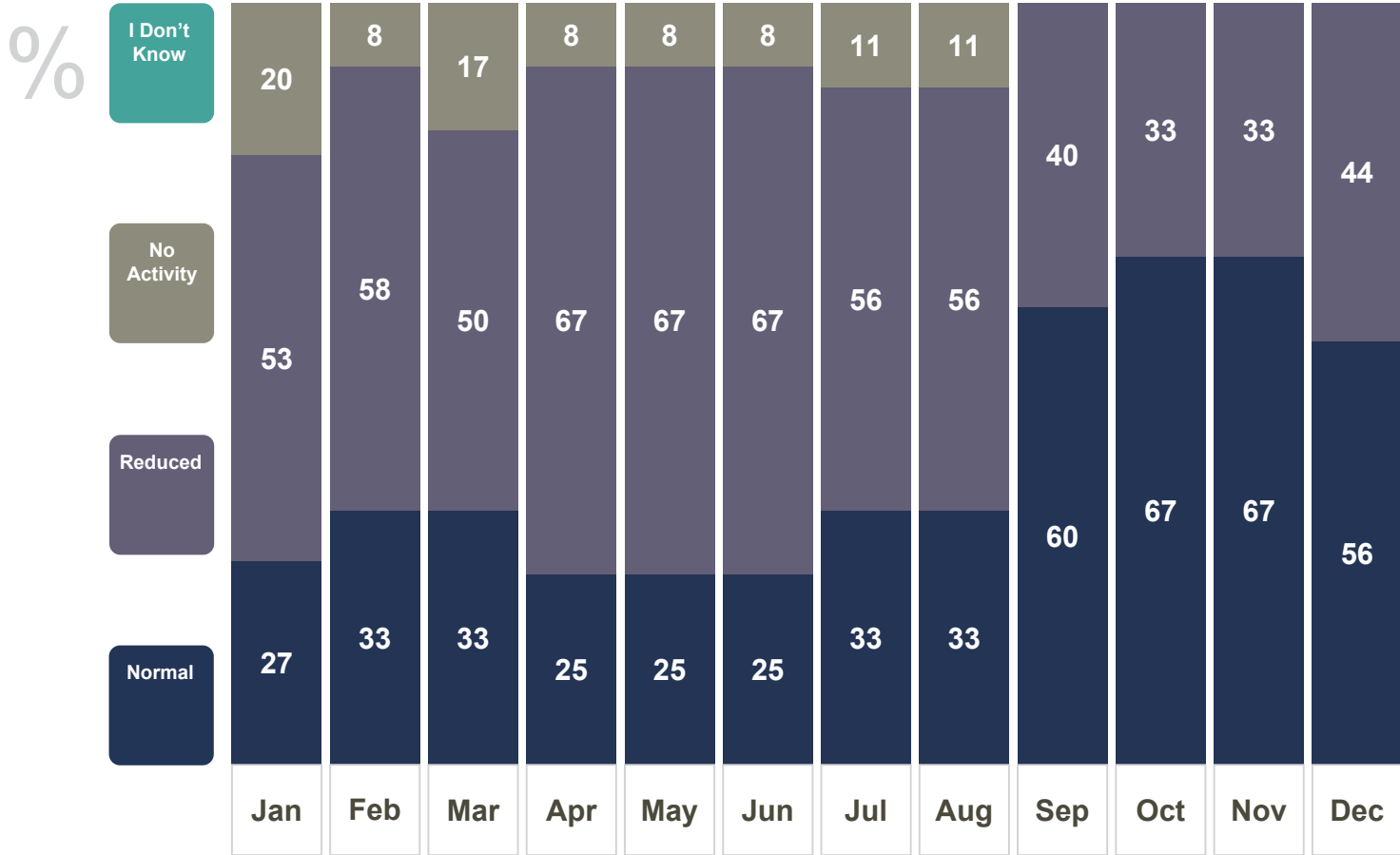
- Streaming of digital events (broadcast studio)
- Vaccination centre
- Sports and / entertainment events stage
- Site to generate brand activations
- Hospital



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

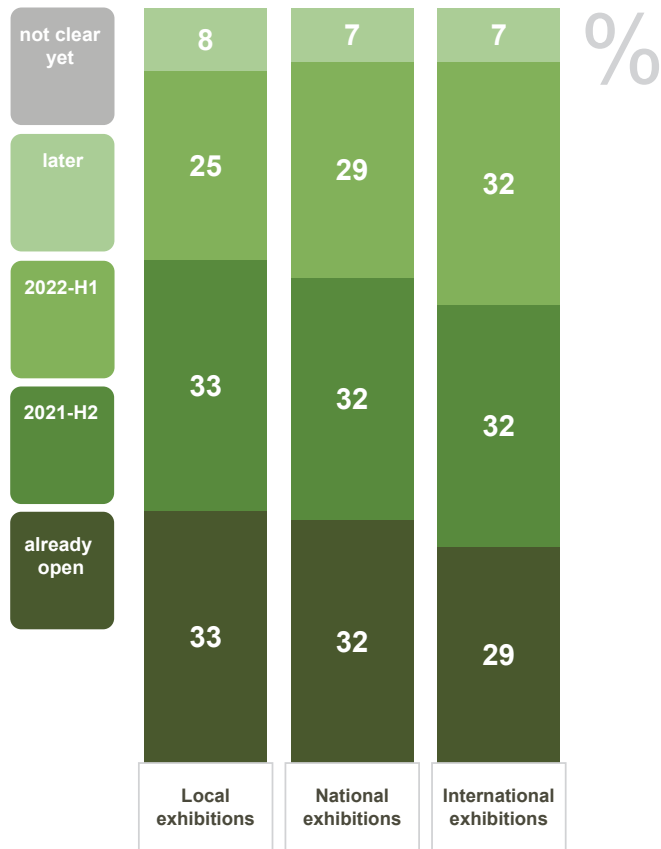


## Situation of industry operations in 2021

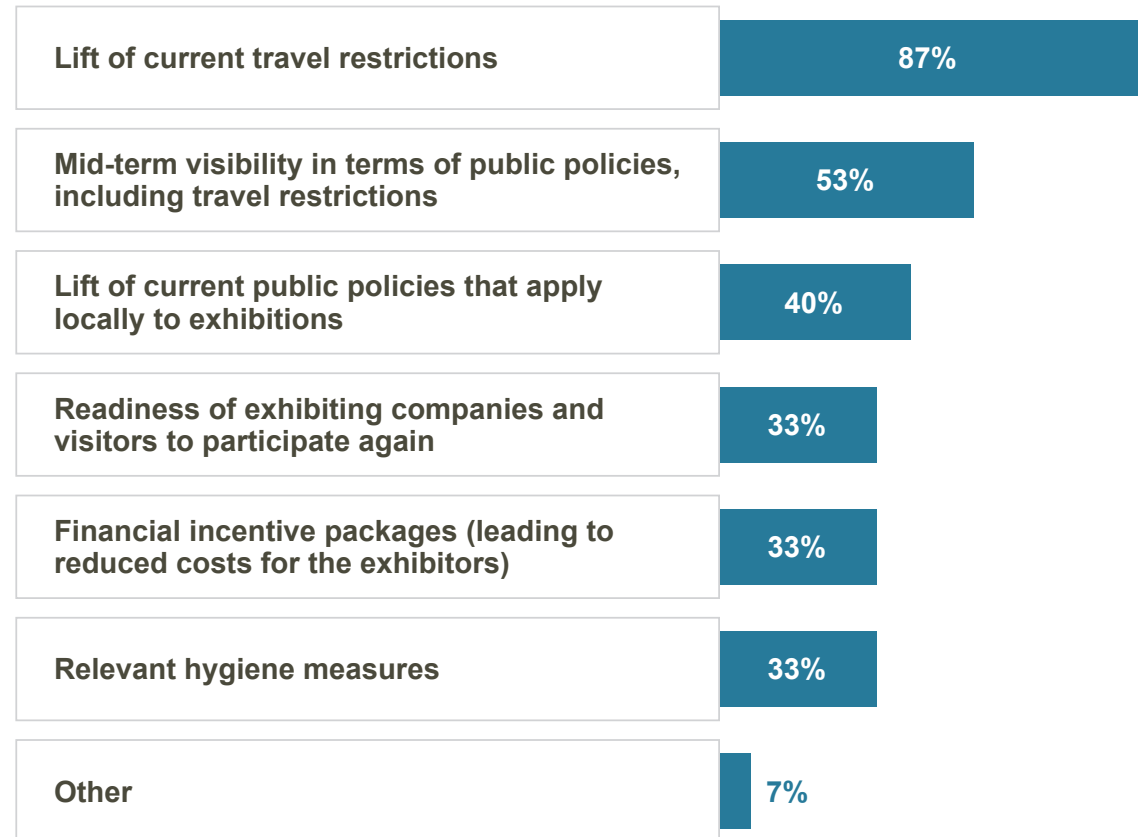




## When do you believe exhibitions will open again in your city?

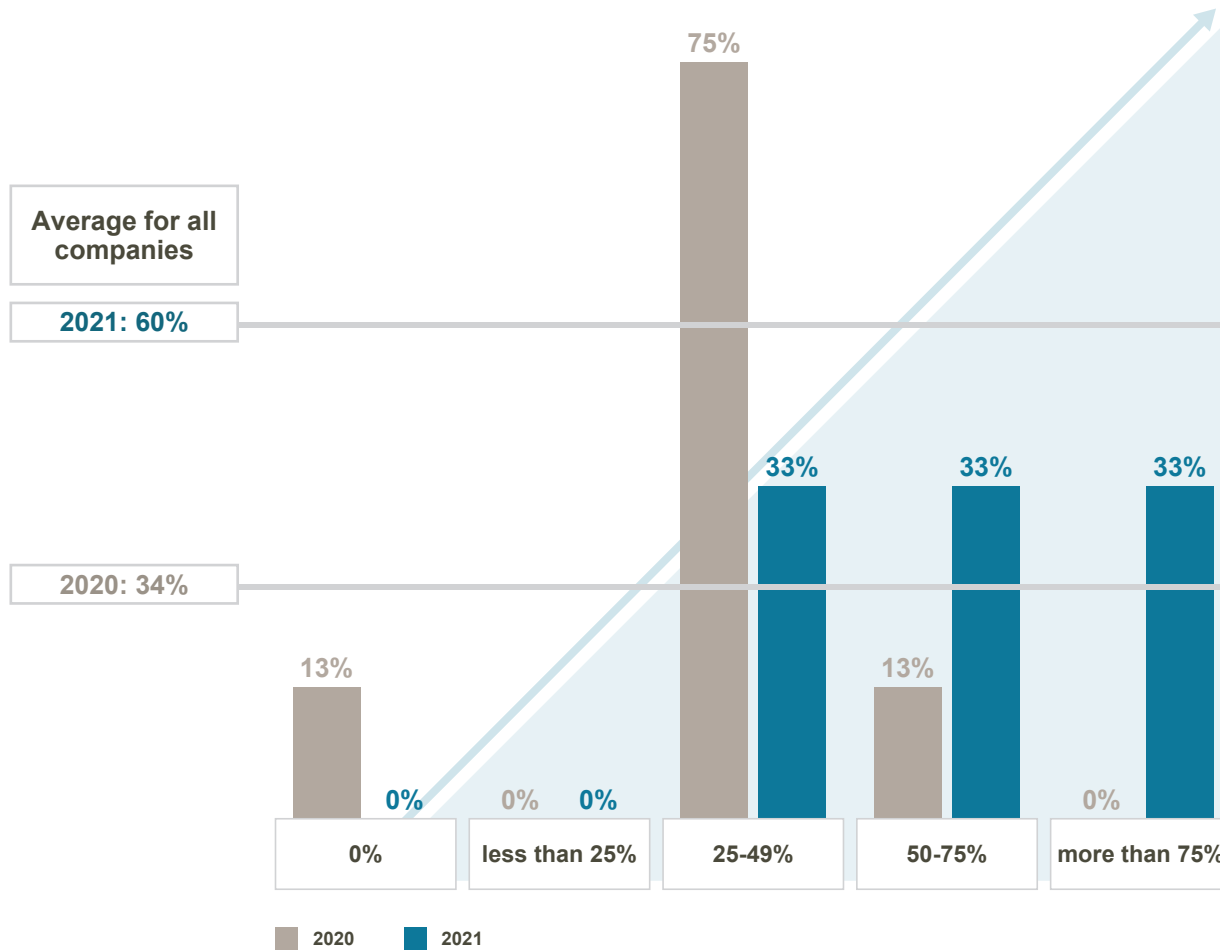


## What do you believe would most help the “bounce back” of exhibitions?

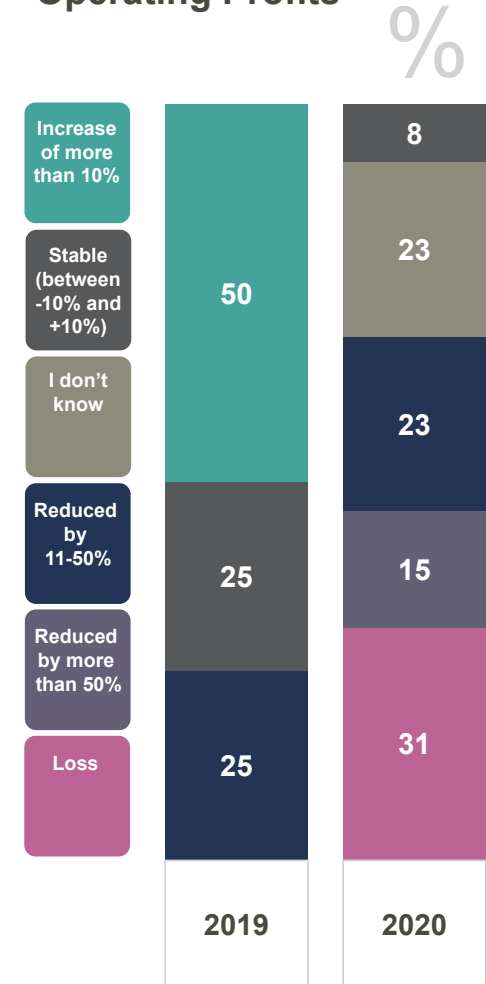




## Revenue compared to 2019

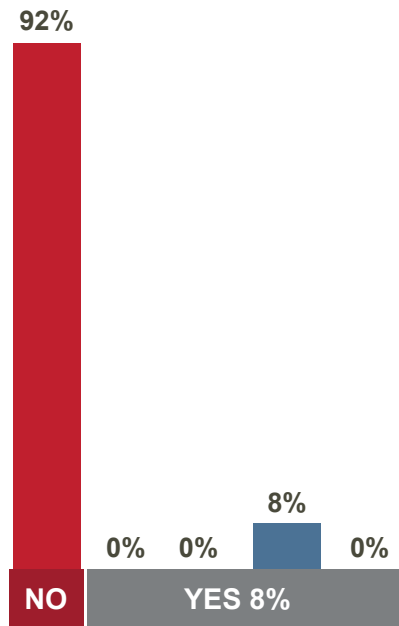


## Operating Profits

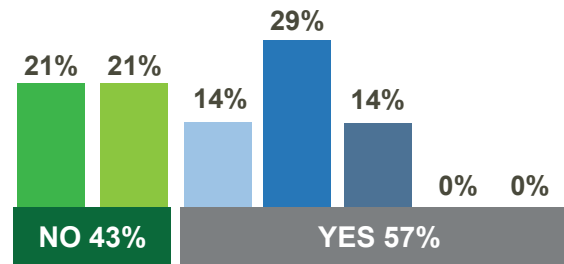




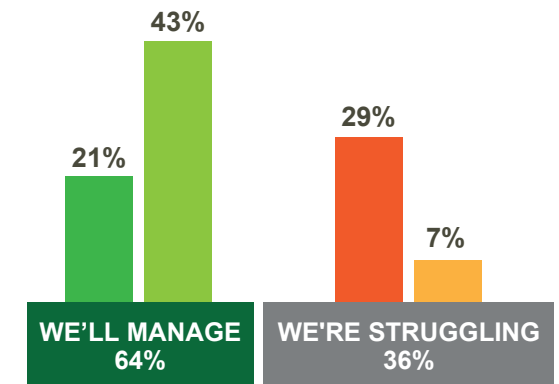
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

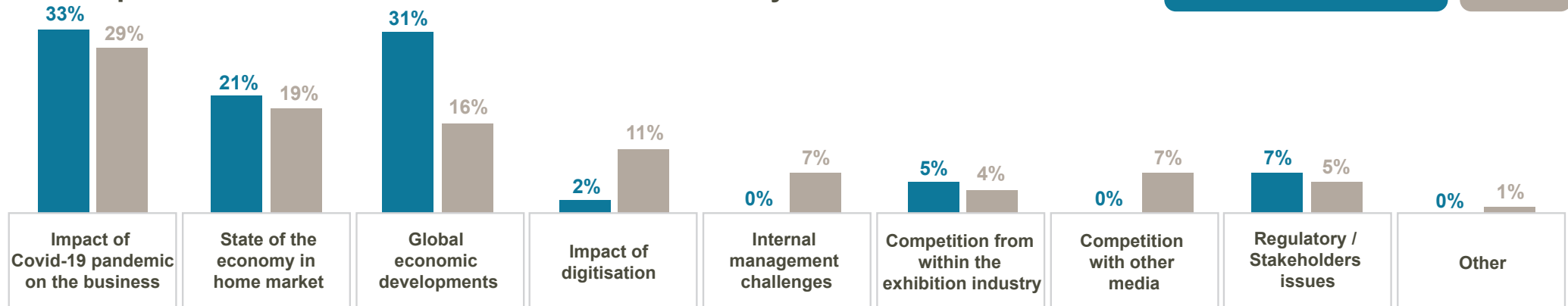
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for United Arab Emirates



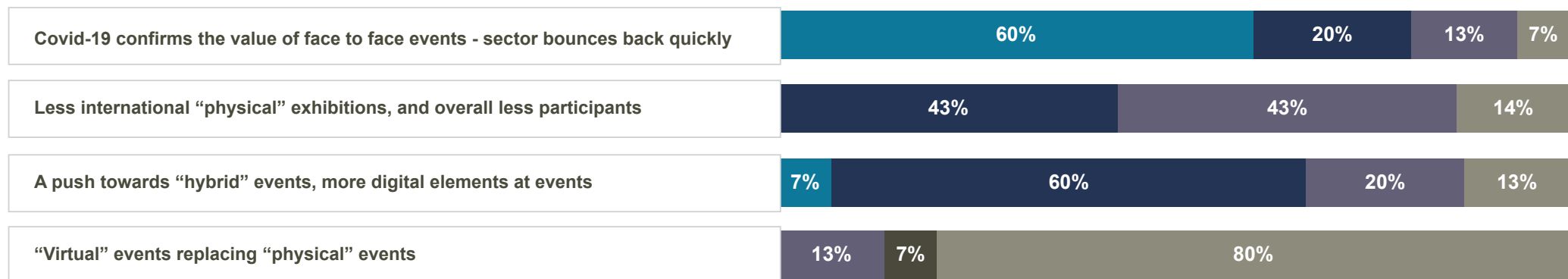
## Most important business issues in the exhibition industry

United Arab Emirates Global



## Format of exhibitions in the coming years

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

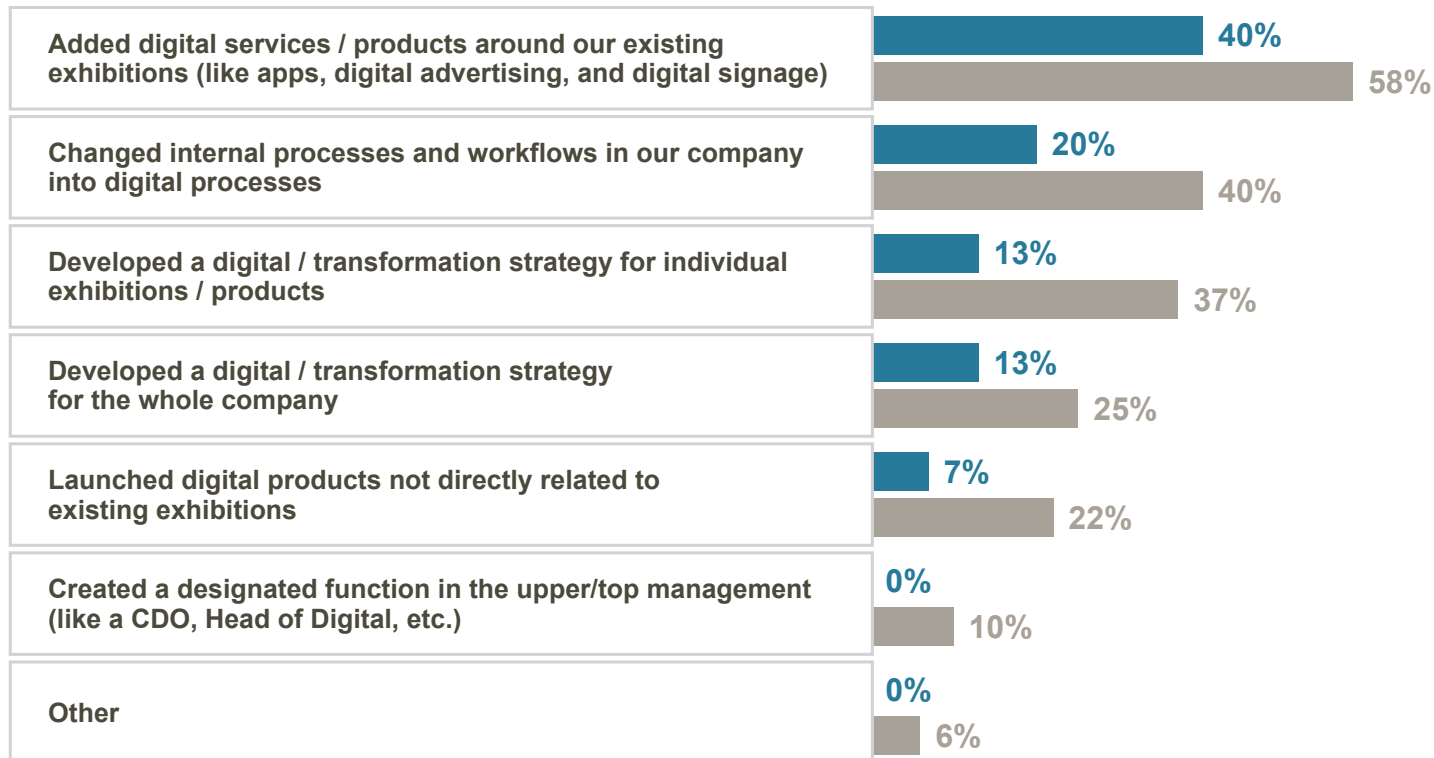




United Arab Emirates

Global

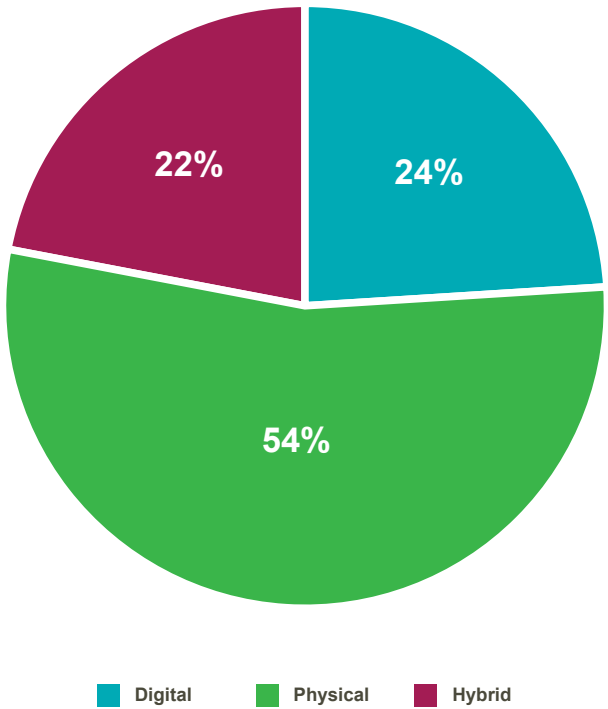
## Digitisation: implementation in United Arab Emirates and globally



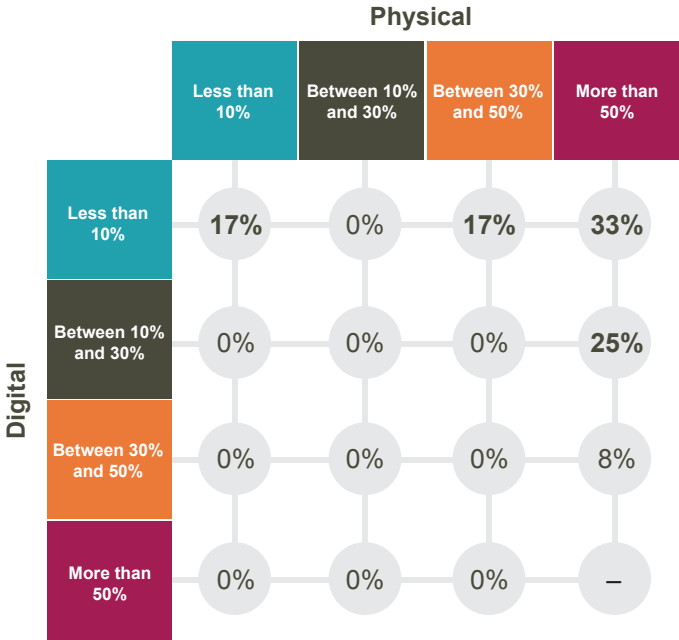




Number of fairs projected in 2021

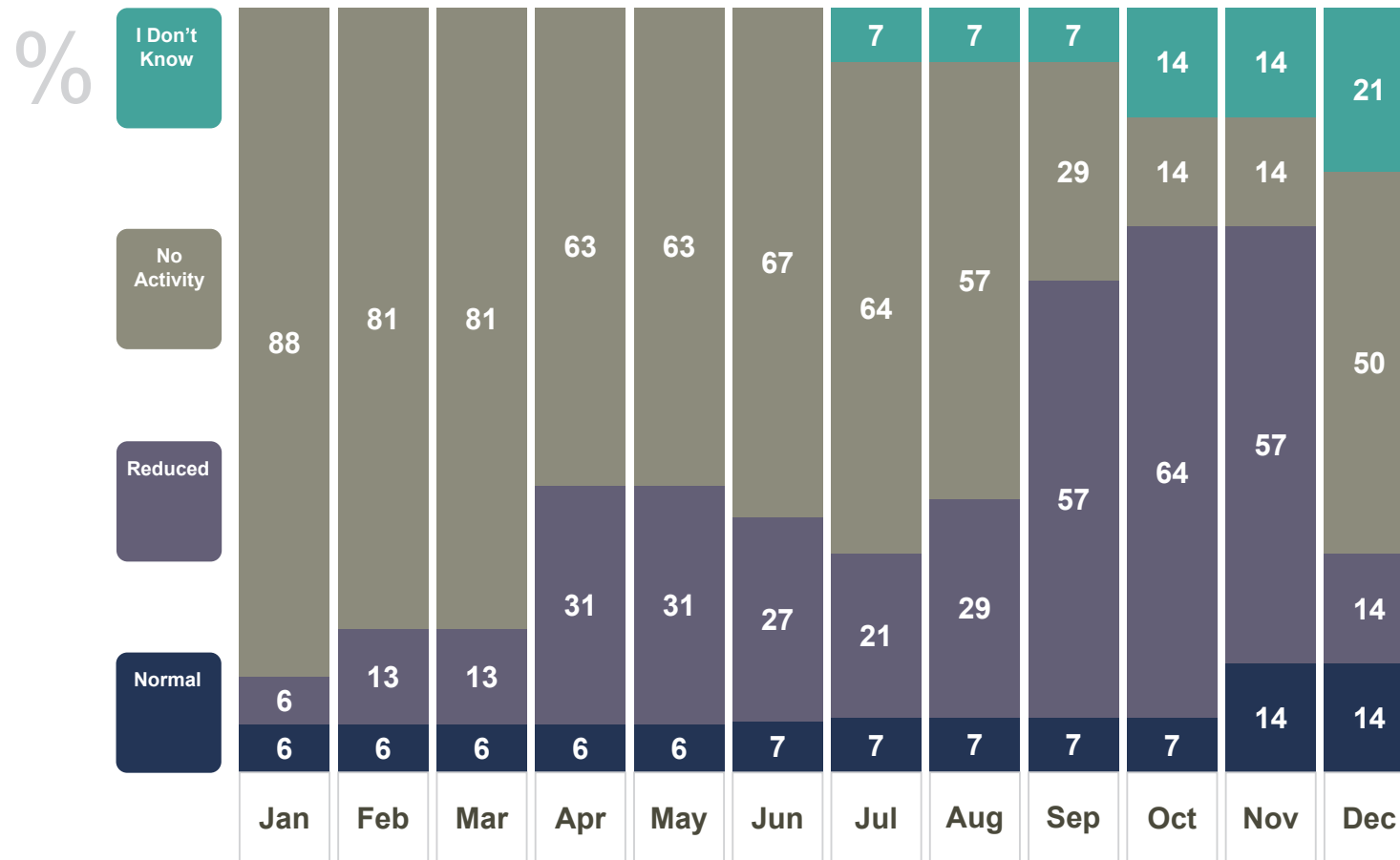


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



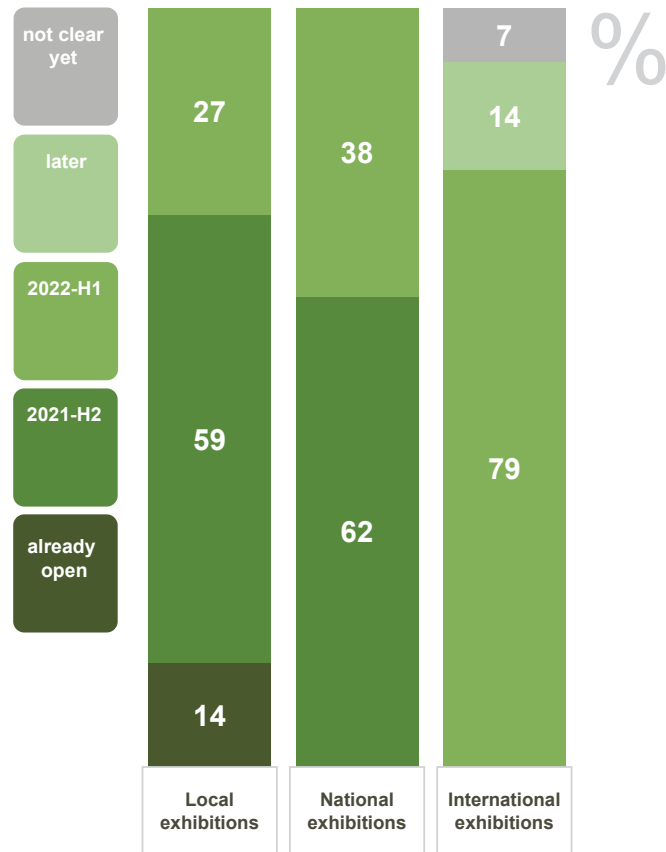


## Situation of industry operations in 2021

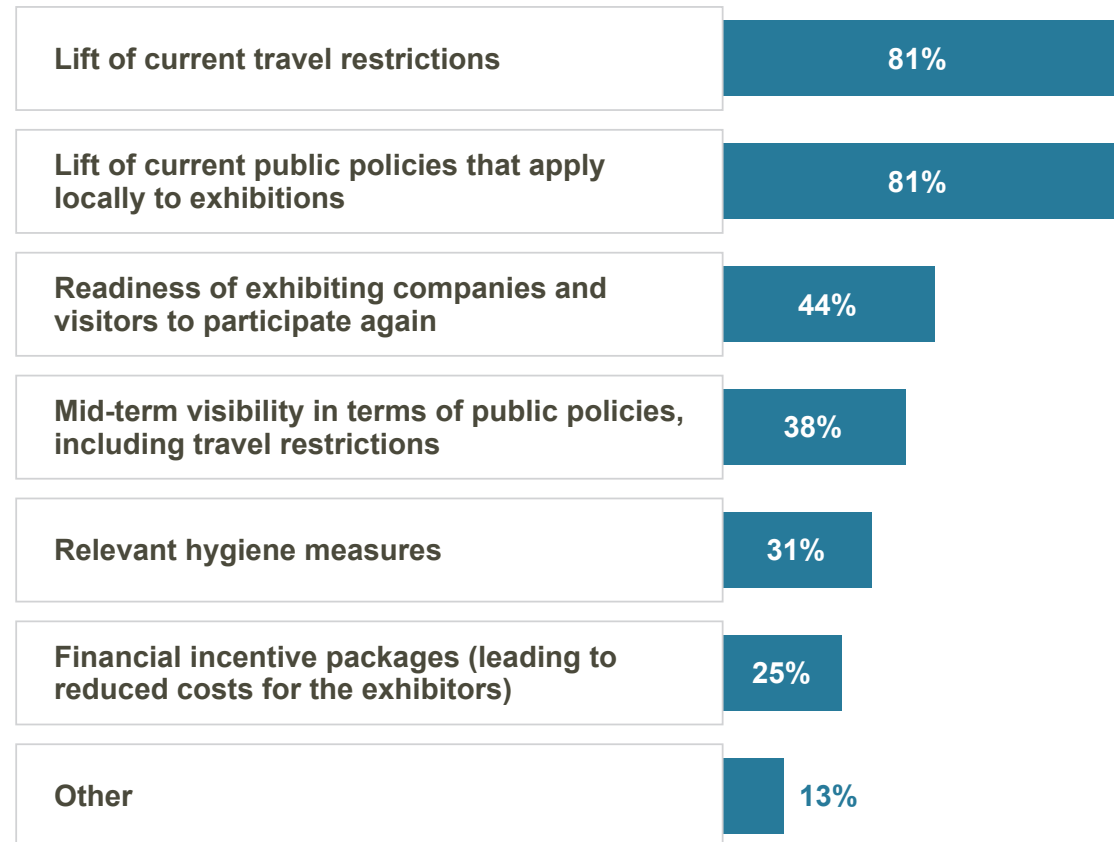




## When do you believe exhibitions will open again in your city?

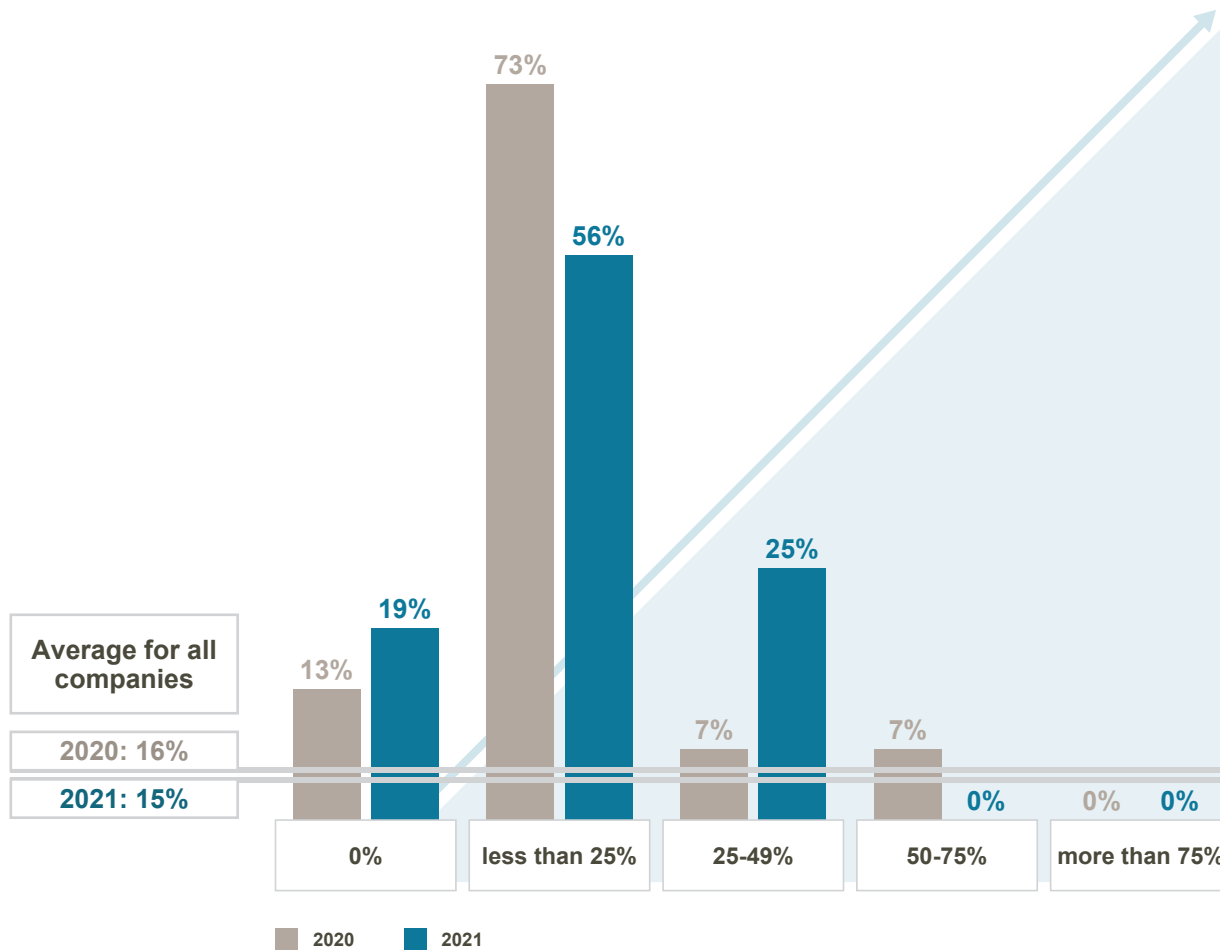


## What do you believe would most help the “bounce back” of exhibitions?

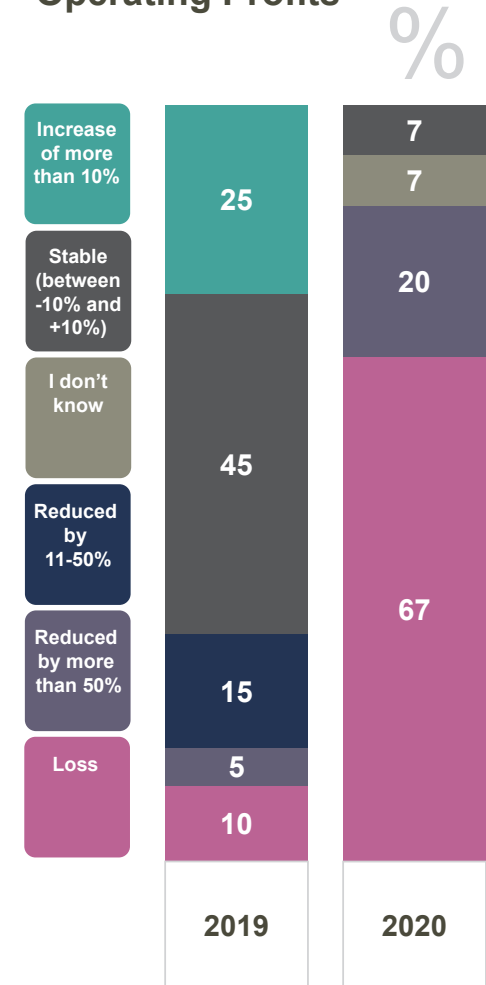




## Revenue compared to 2019

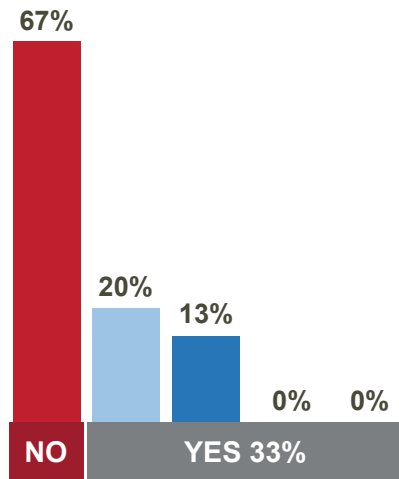


## Operating Profits

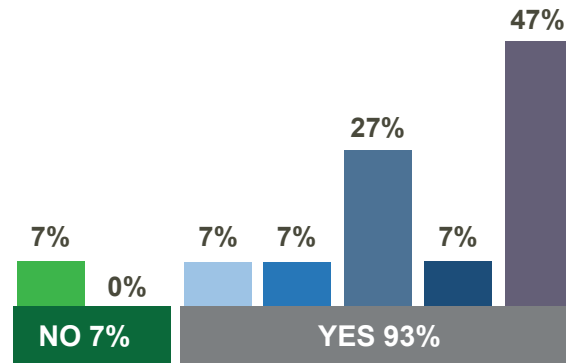




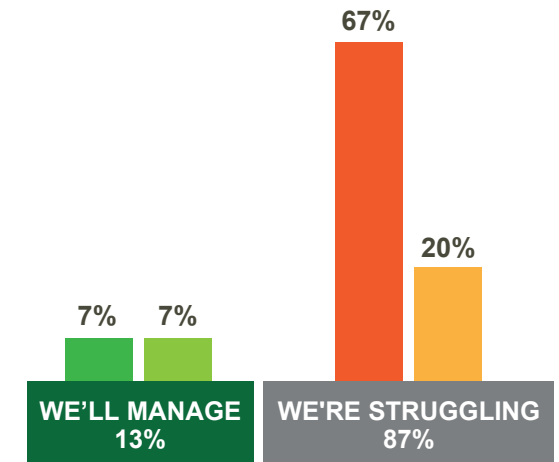
## Did your company benefit from public financial support?



## 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

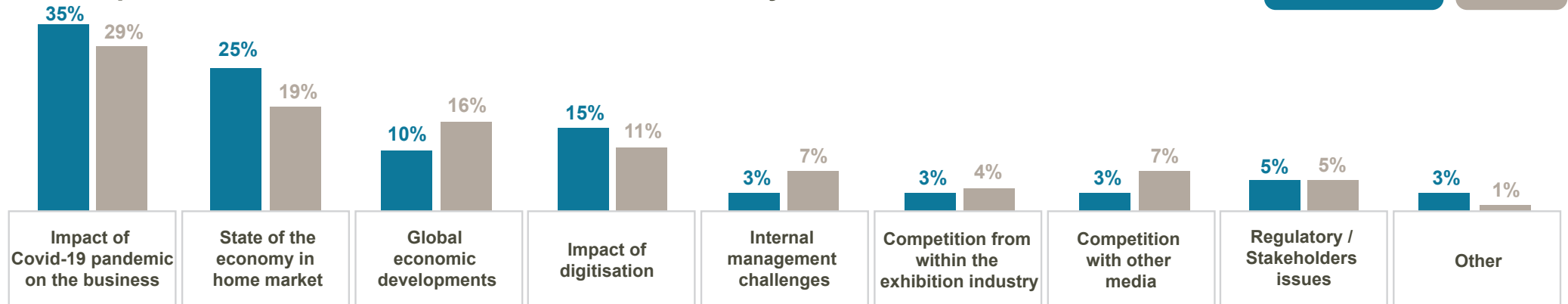
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



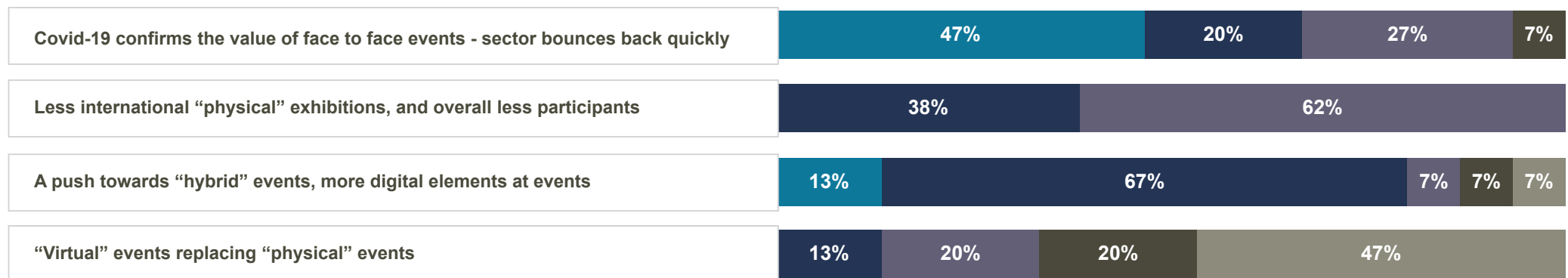
## Most important business issues in the exhibition industry

South Africa Global



## Format of exhibitions in the coming years

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

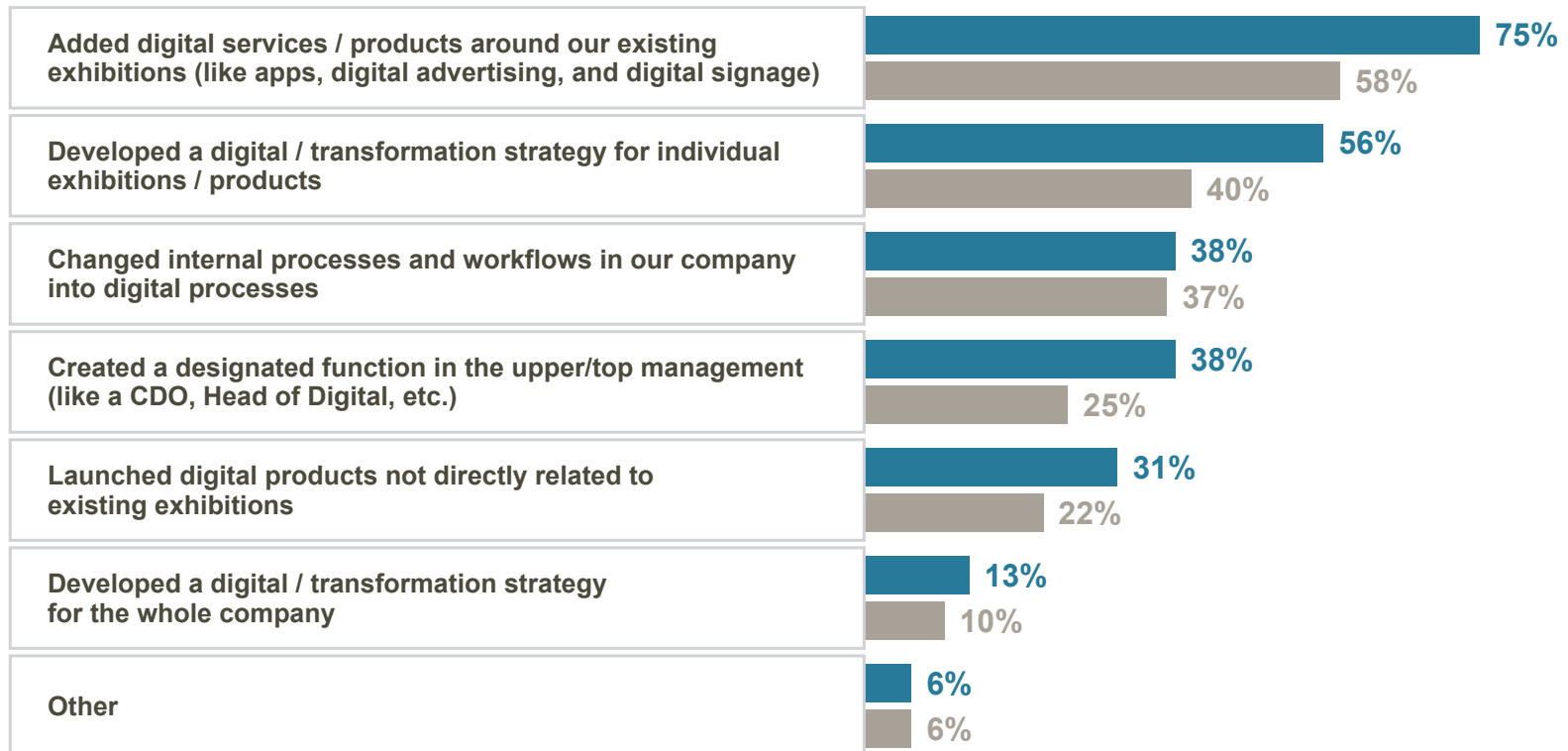




South Africa

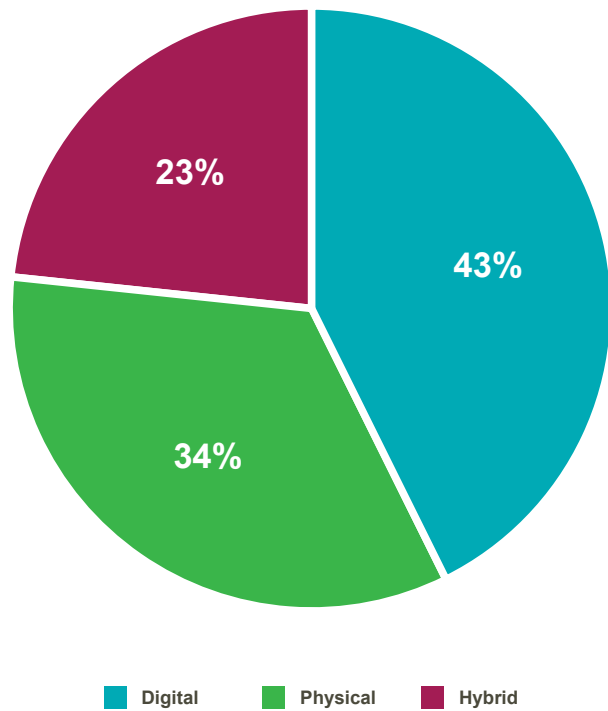
Global

## Digitisation: implementation in South Africa and globally

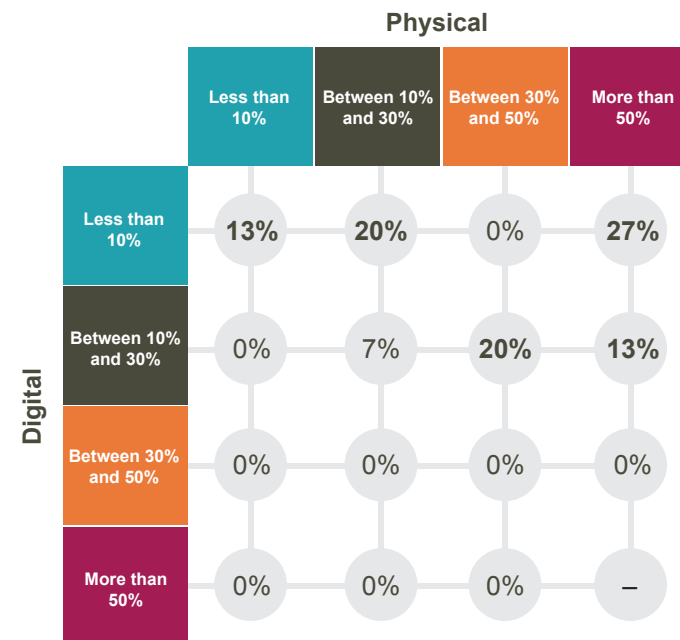




## Number of fairs projected in 2021



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

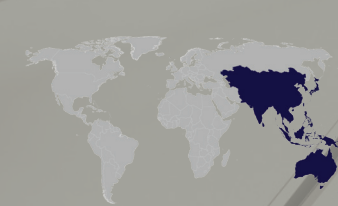




# Asia & Pacific



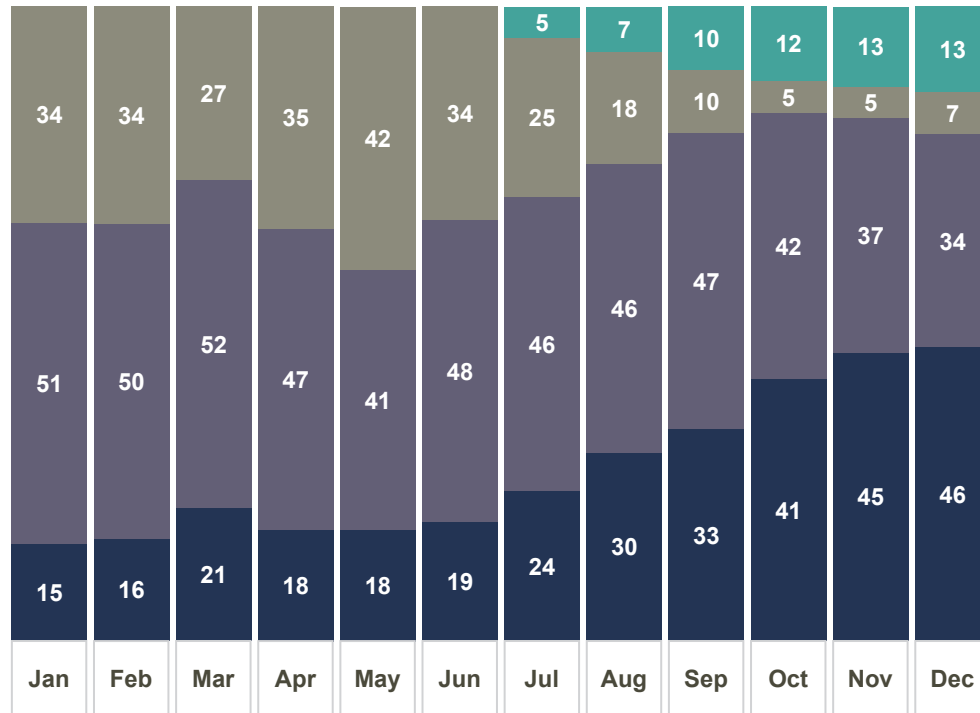
# Operations - Reopening Exhibitions Asia & Pacific



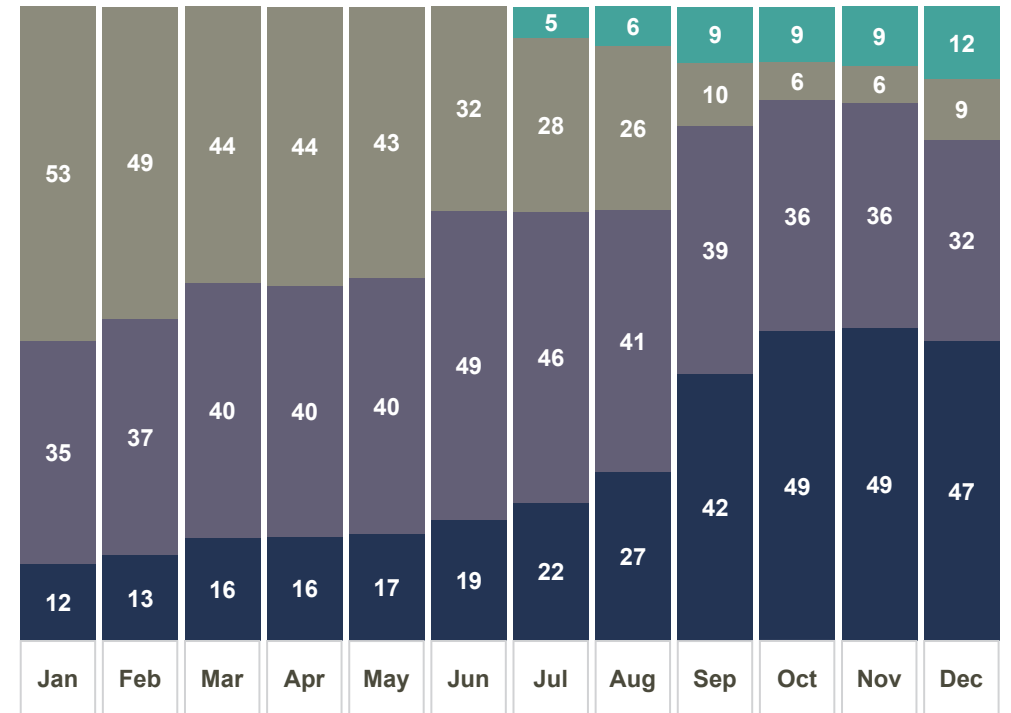
## Situation of industry operations in 2021

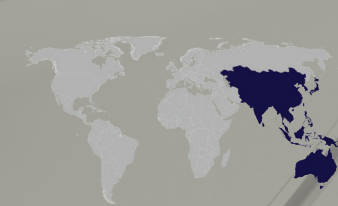


### Asia & Pacific

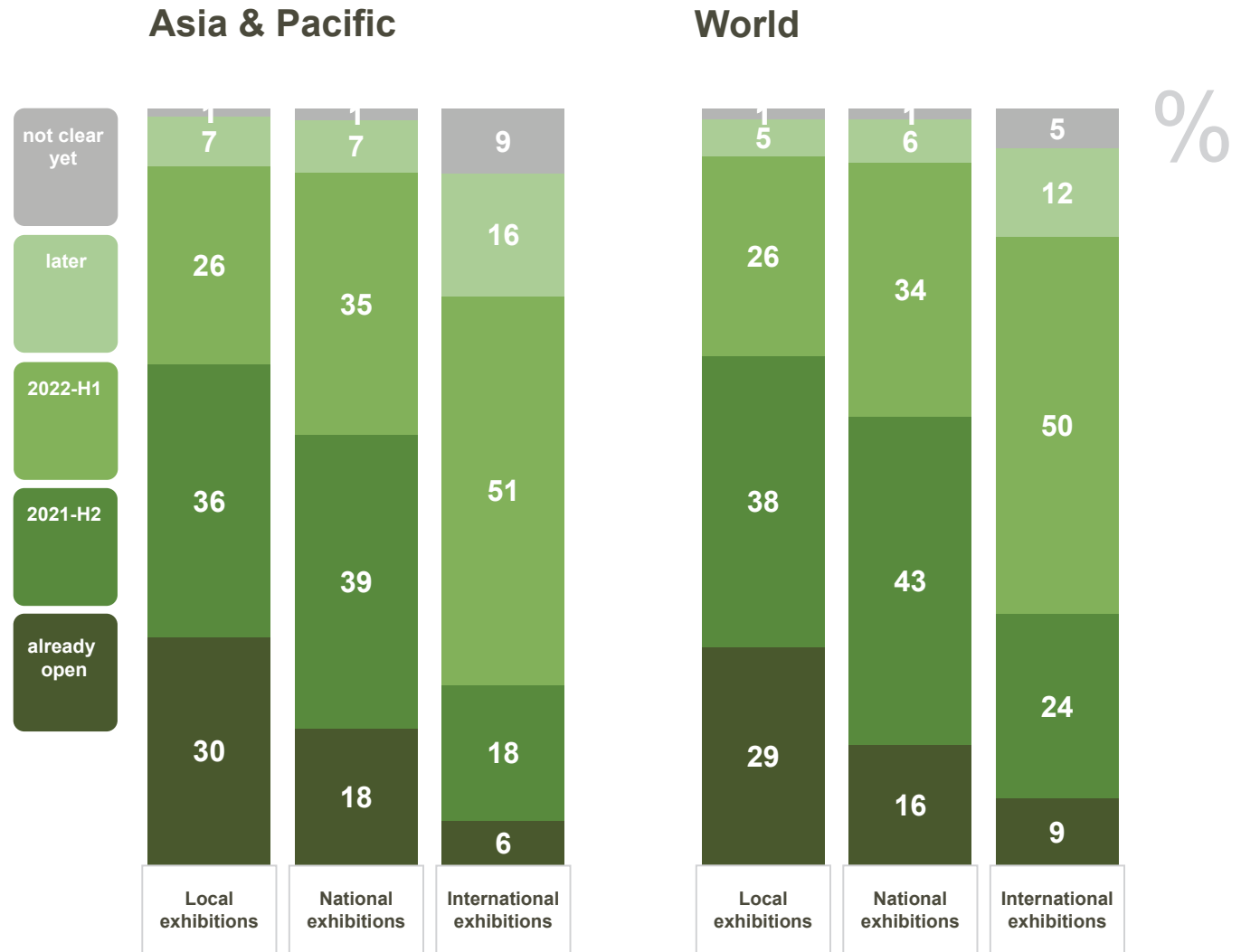


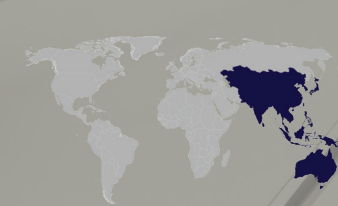
### World





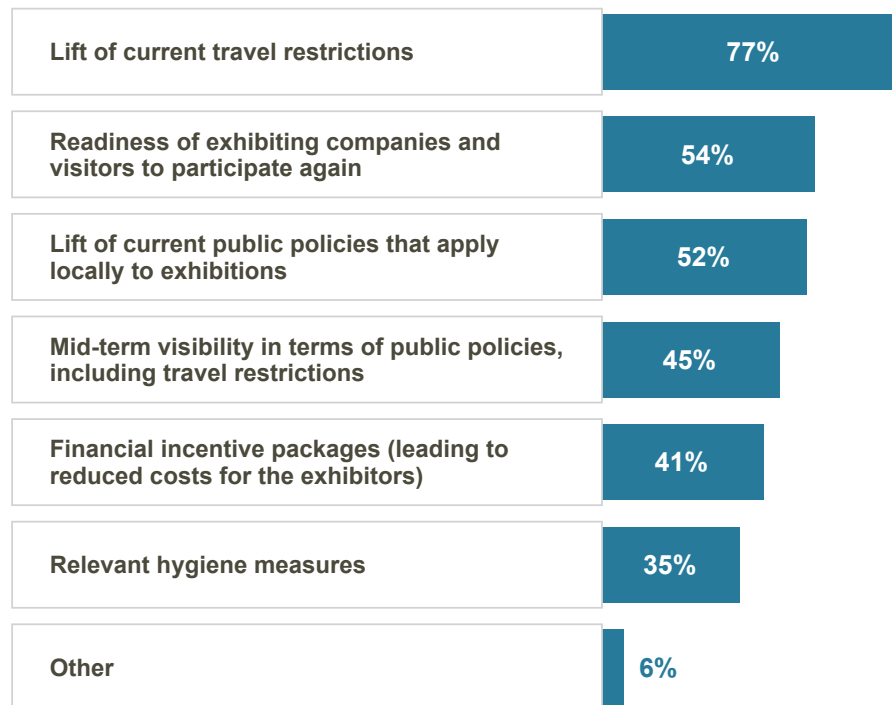
When do you believe exhibitions will open again in your city?



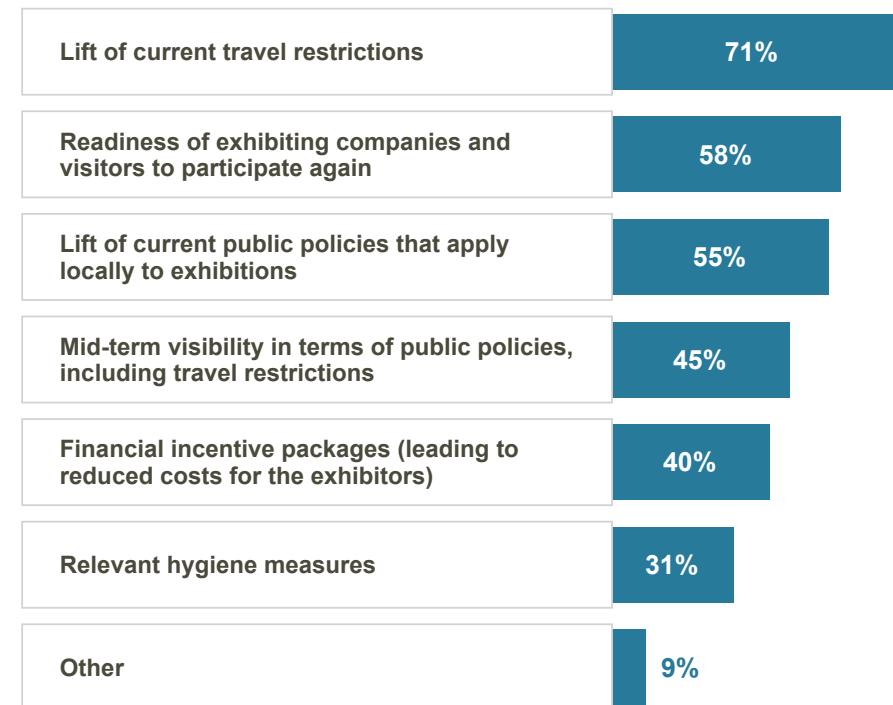


## What do you believe would most help the “bounce back” of exhibitions?

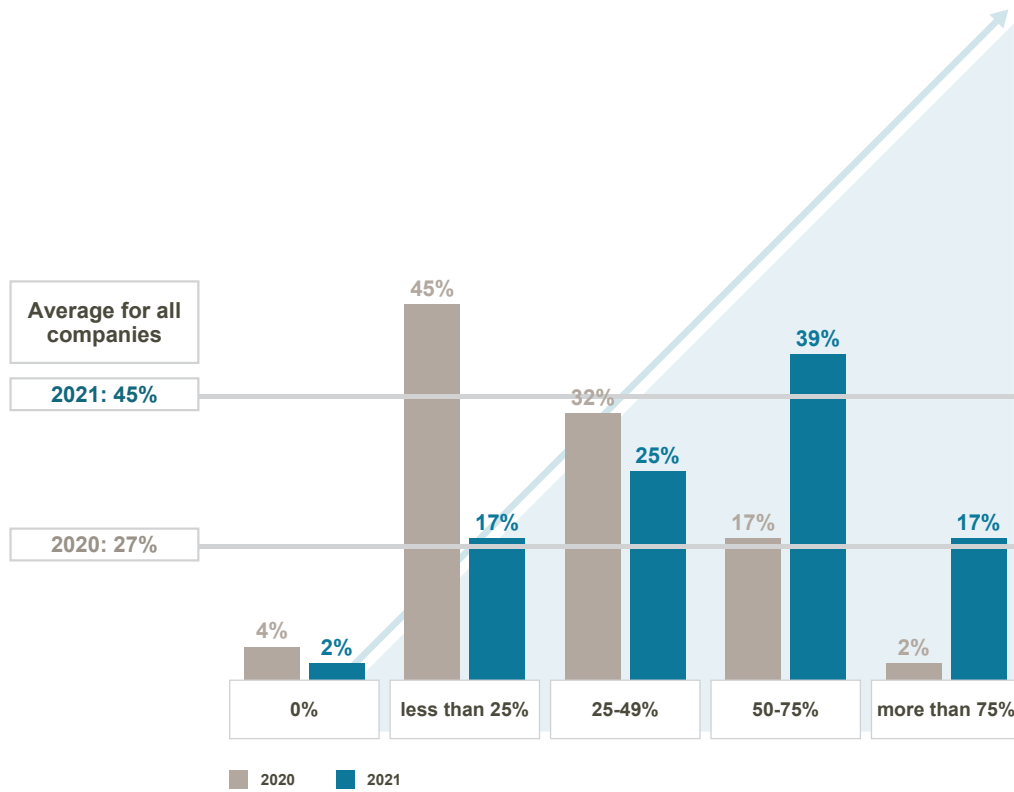
### Asia & Pacific



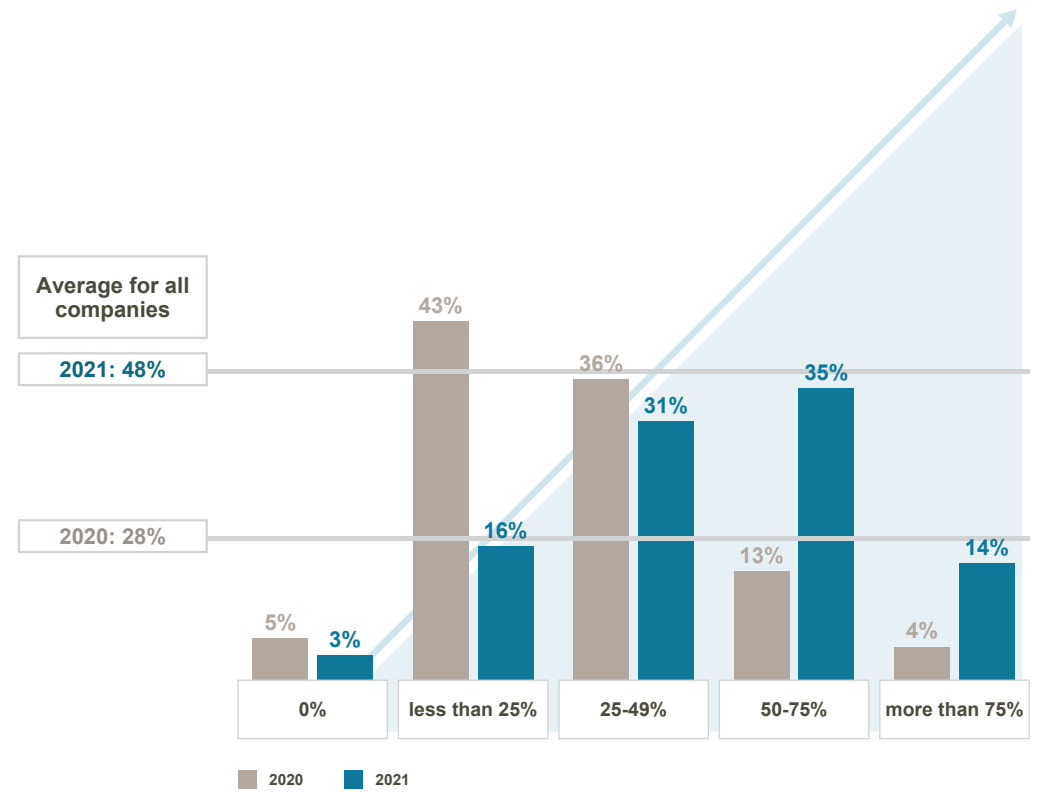
### World



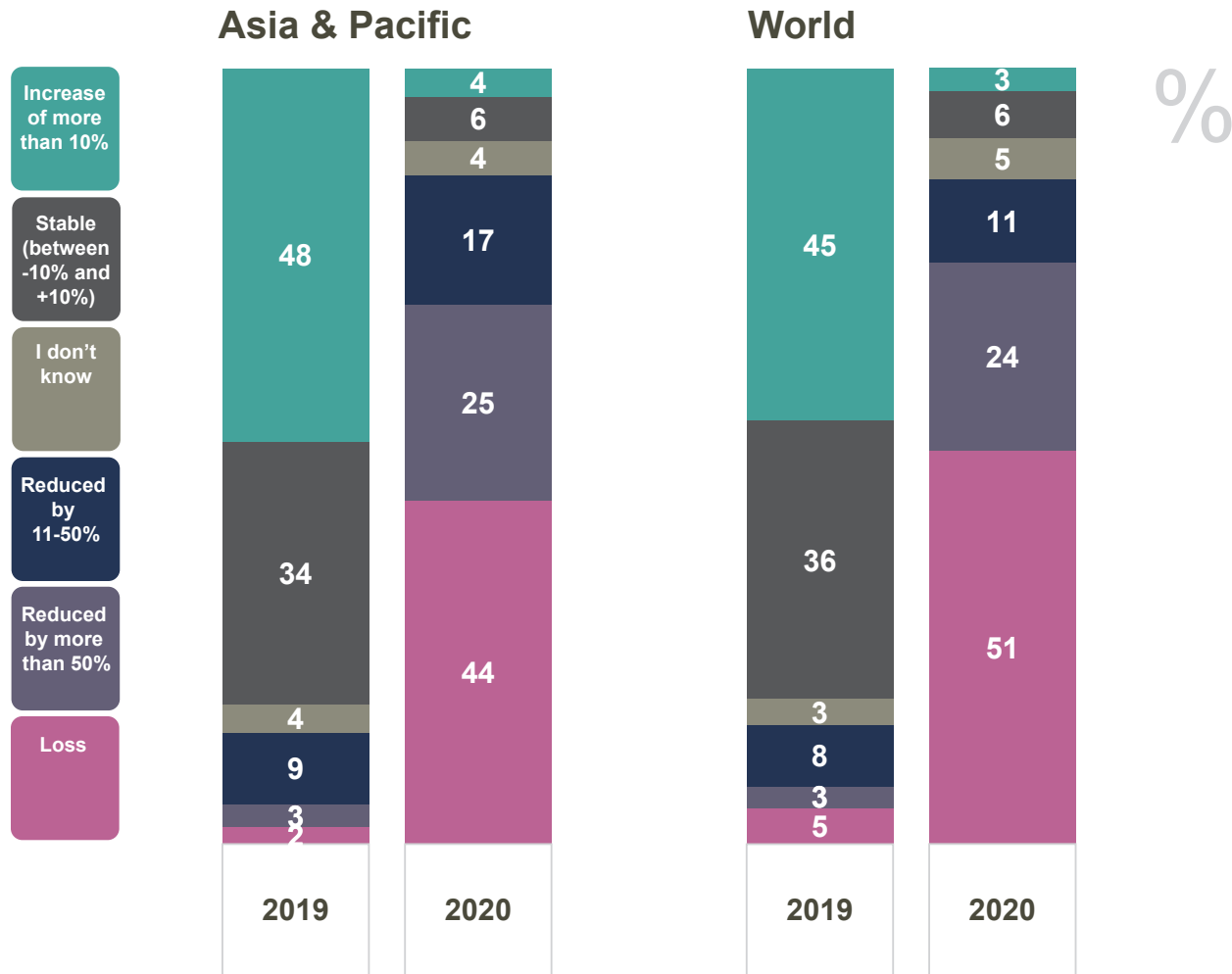
## Revenue compared to 2019 Asia & Pacific



## World



# Operating profits Asia & Pacific

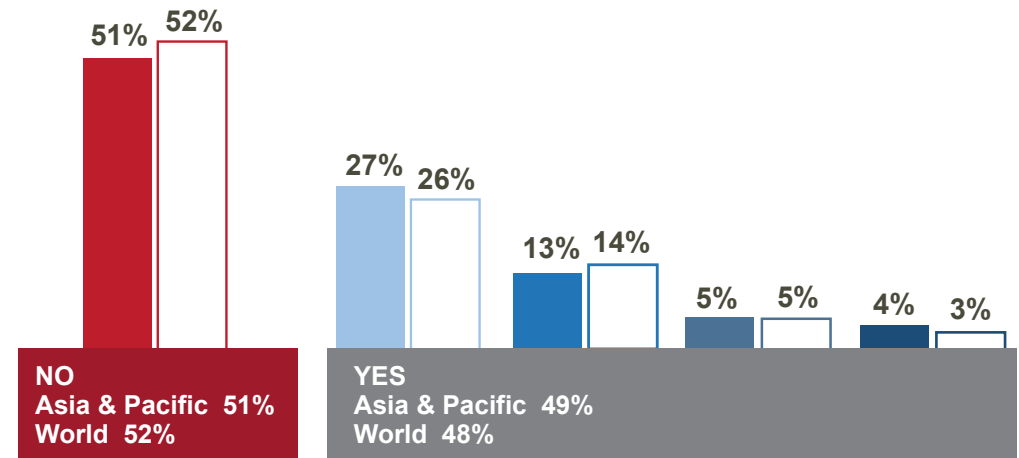


## Did your company benefit from public financial support?

Asia & Pacific

World

- 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

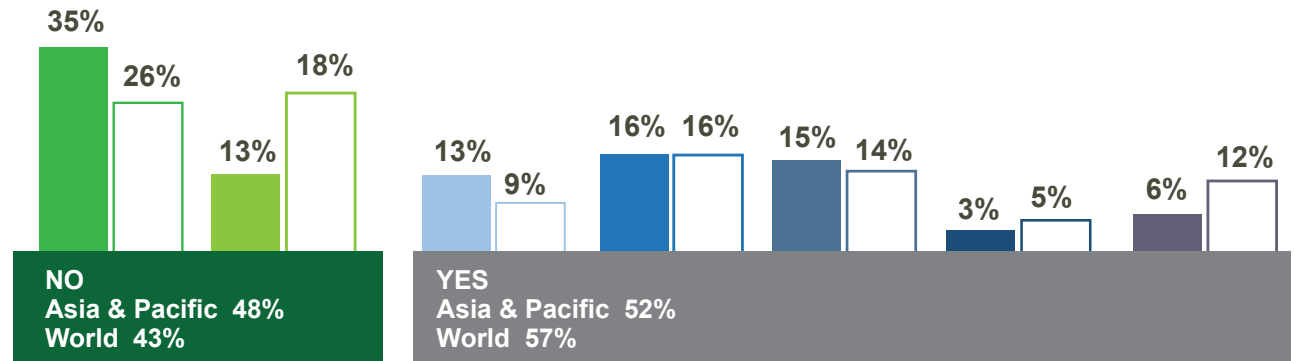


## Have you had to reduce your workforce?

Asia & Pacific

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



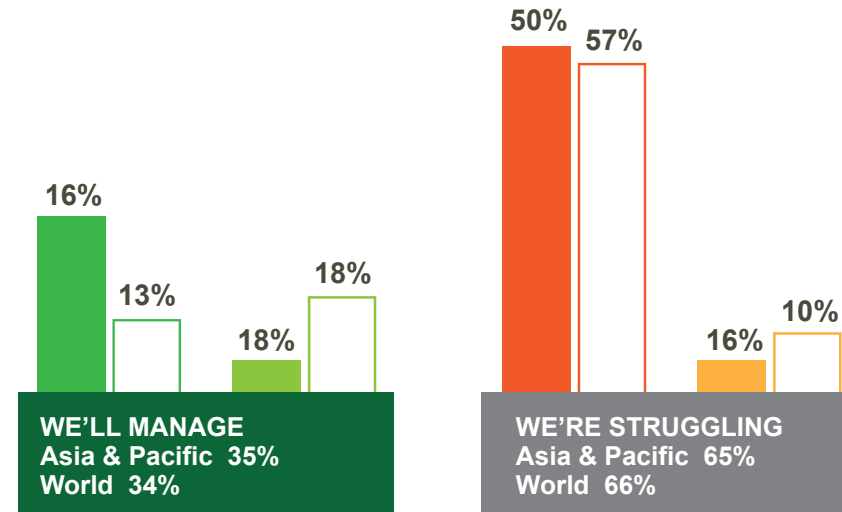


## If there is no business for the next 6 months, which best applies?

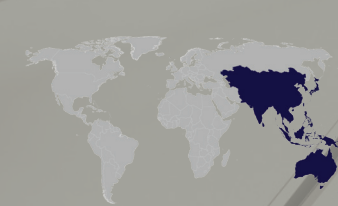
Asia & Pacific

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

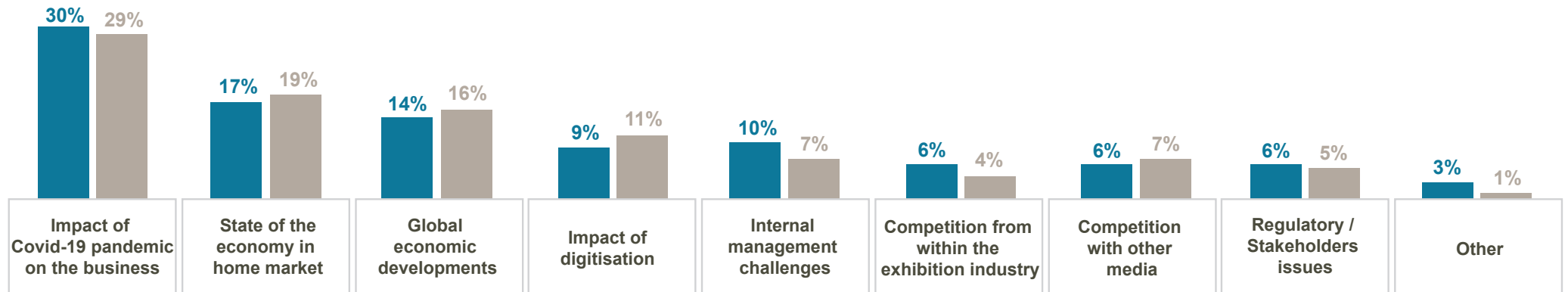


# Most Important Business Issues - Format of Exhibitions - Asia & Pacific



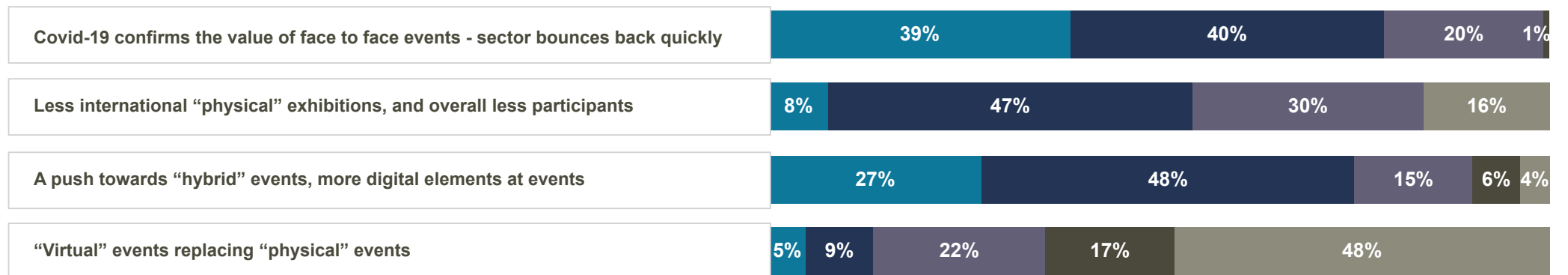
## Most important business issues in the exhibition industry

Asia & Pacific Global



## Format of exhibitions in the coming years

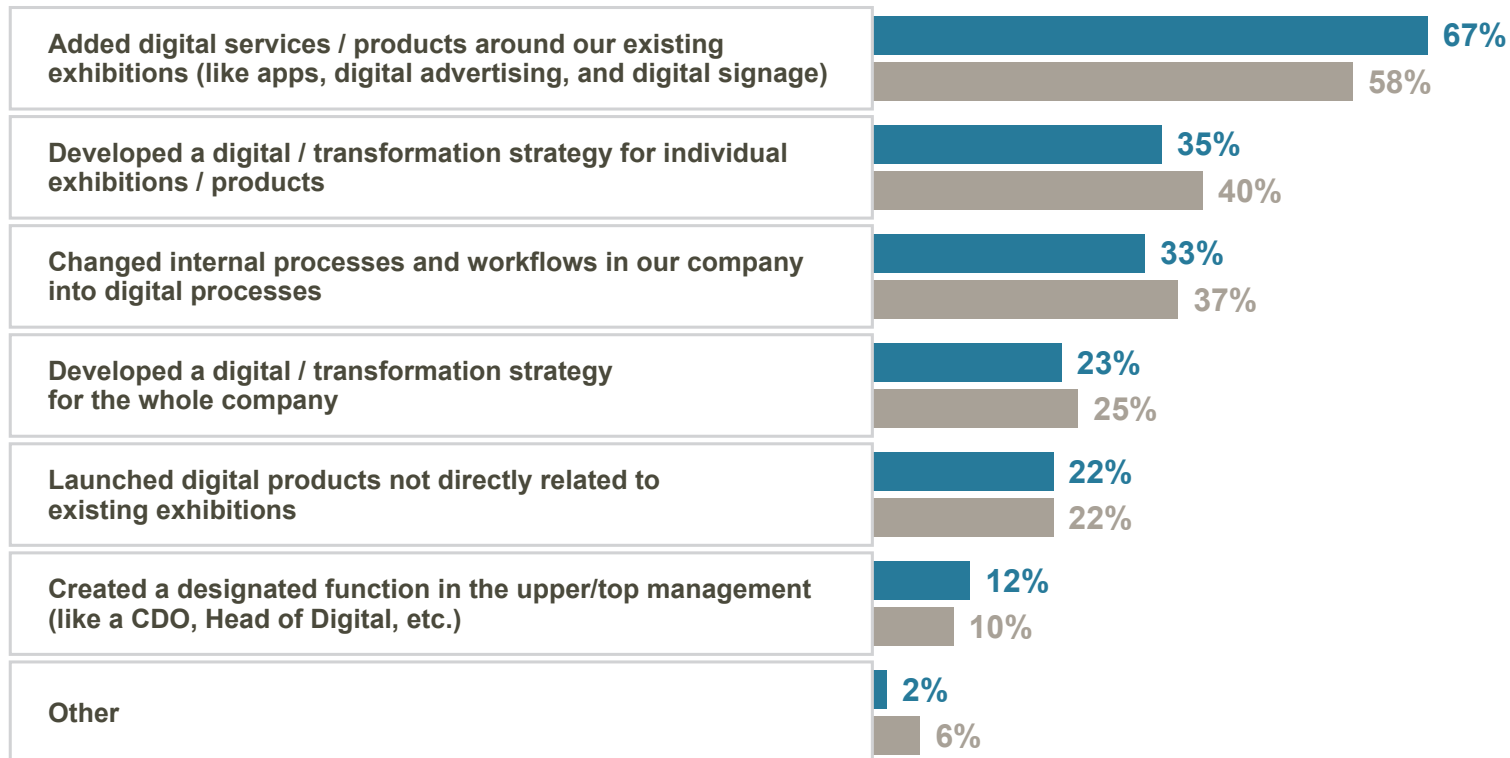
Yes, for sure Most probably Not sure Not sure at all Definitely not



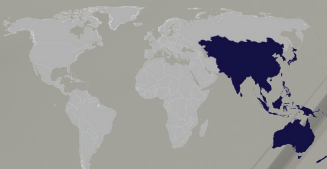
Asia & Pacific

Global

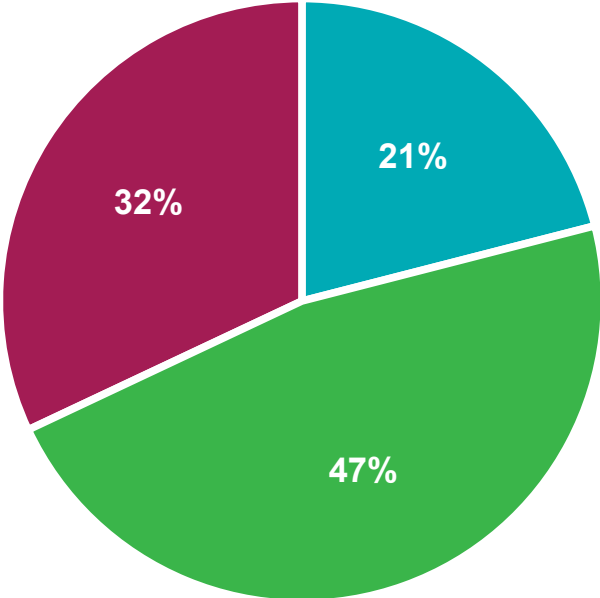
## Digitisation: implementation in Asia/Pacific and globally



# Number of fairs projected in 2021 Asia & Pacific

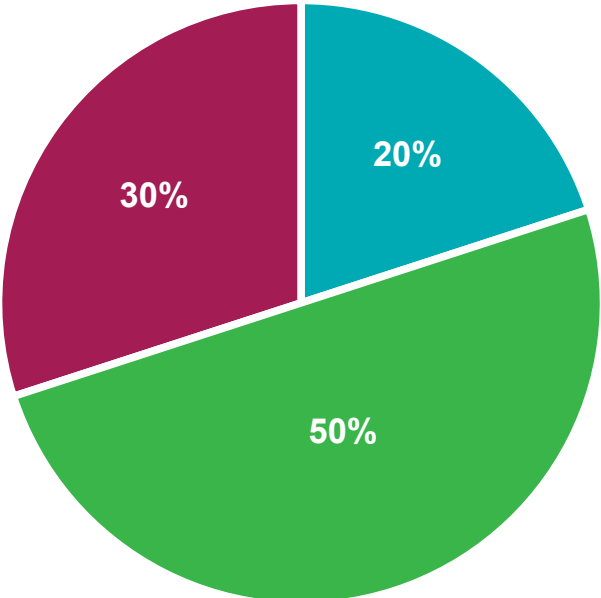


Asia & Pacific



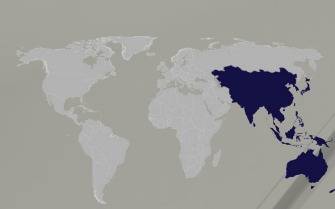
■ Digital ■ Physical ■ Hybrid

World

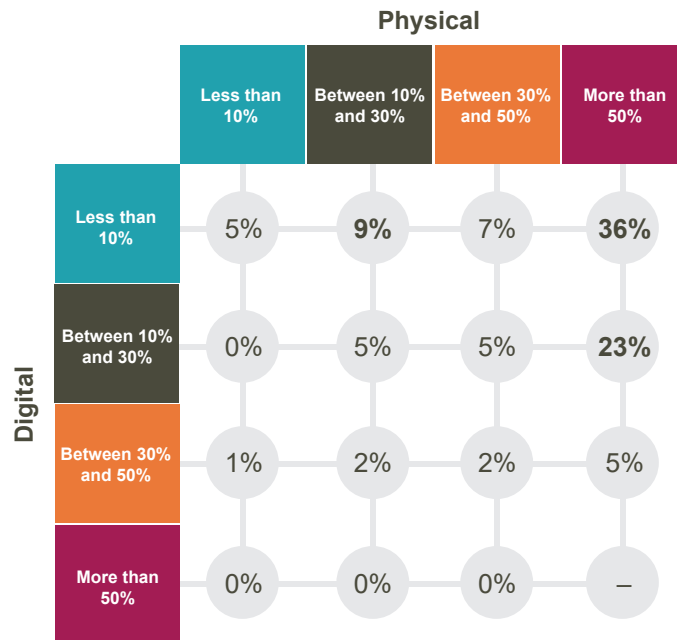


■ Digital ■ Physical ■ Hybrid

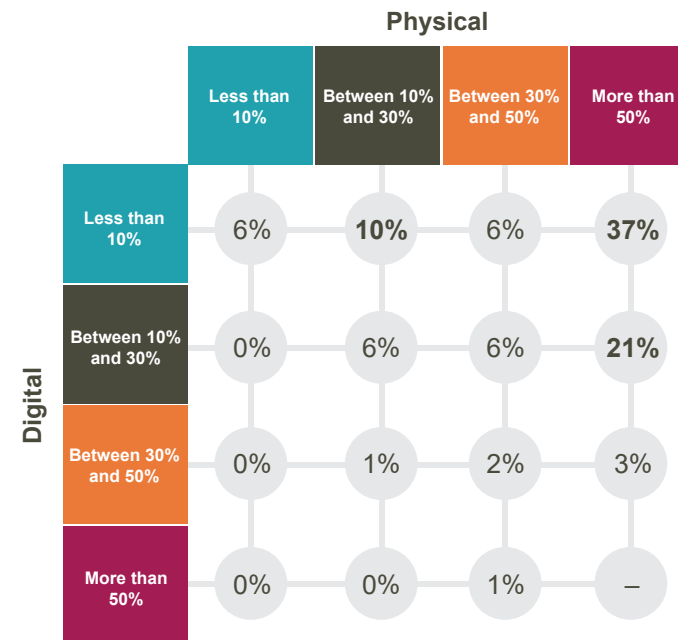
# Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



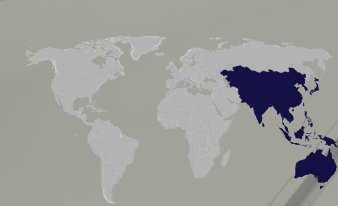
## Asia & Pacific



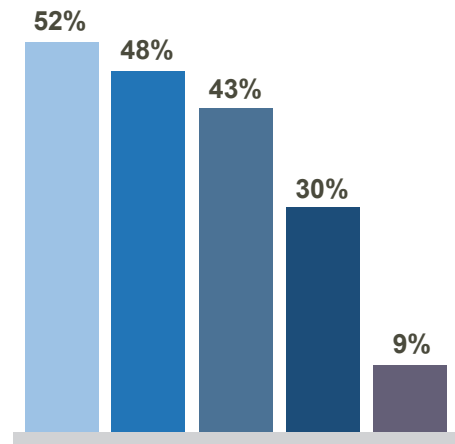
## World



# Expanded activities (for venues only) Asia & Pacific

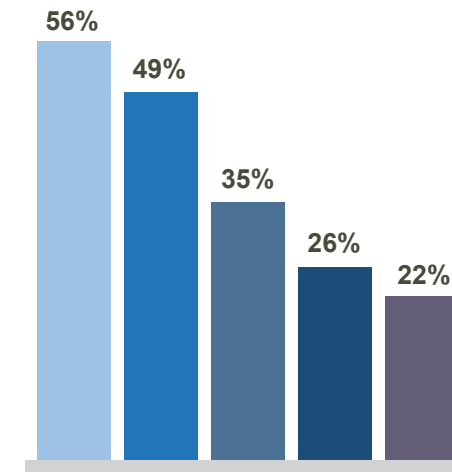


Asia & Pacific



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

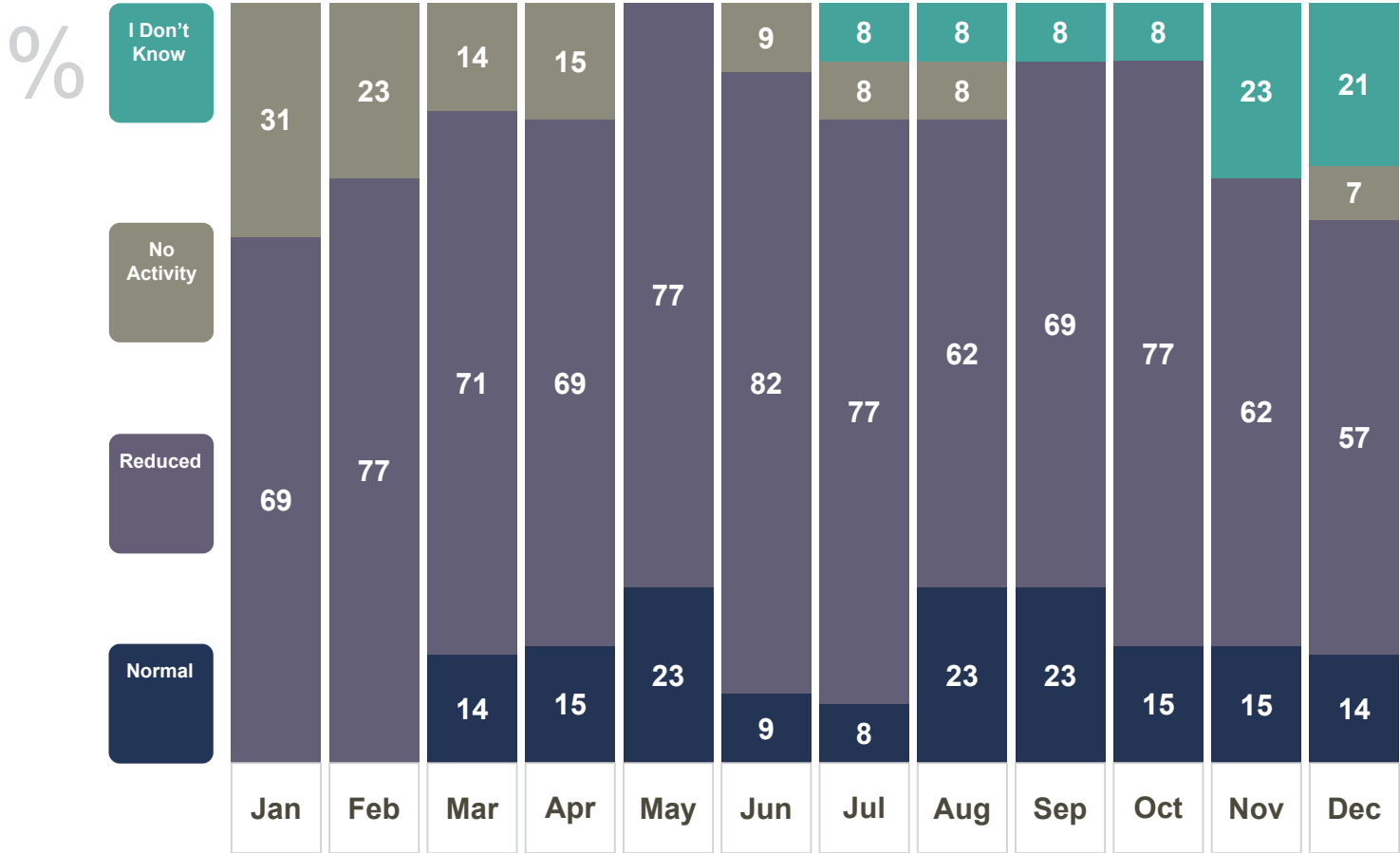
World



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

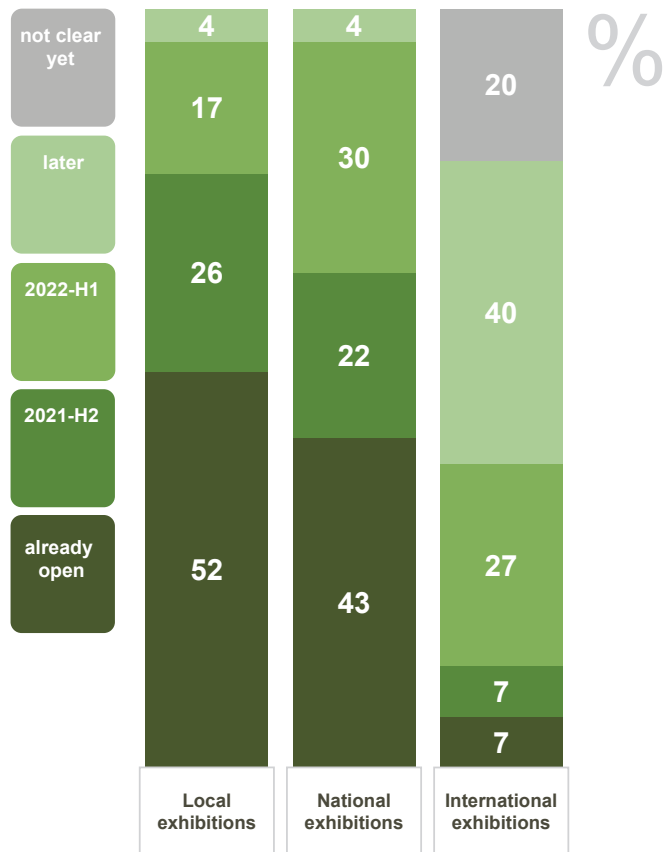


## Situation of industry operations in 2021

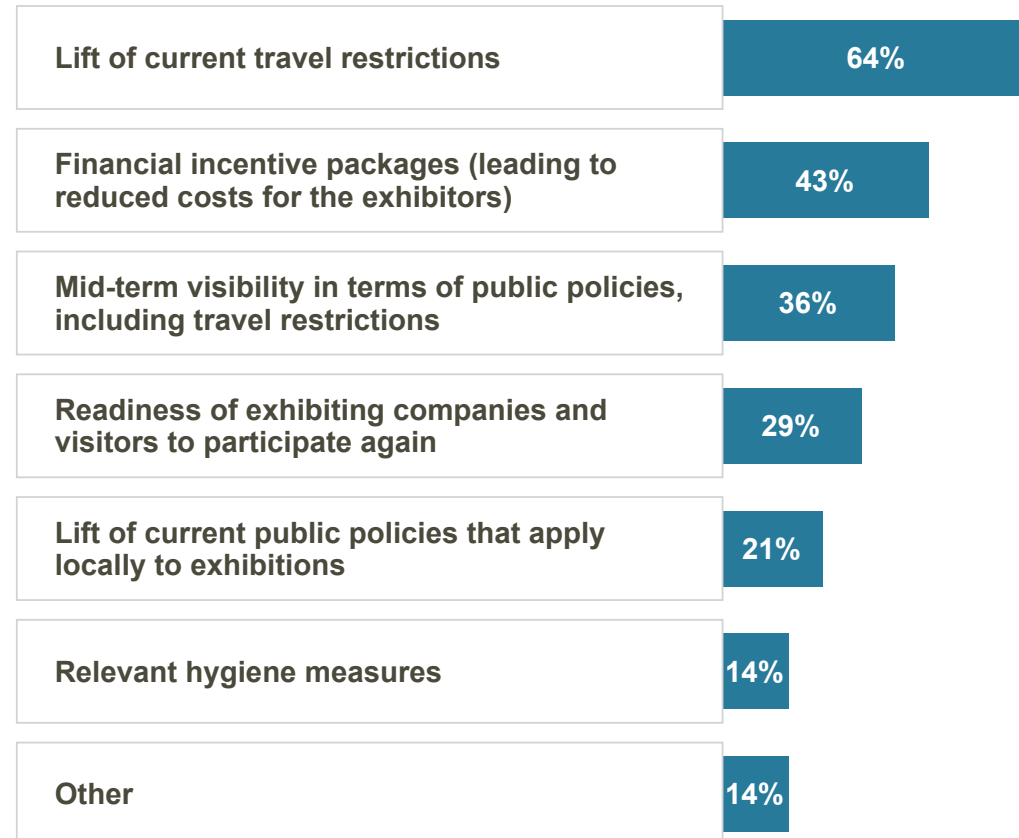




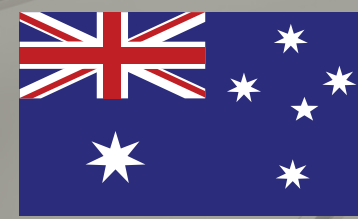
## When do you believe exhibitions will open again in your city?



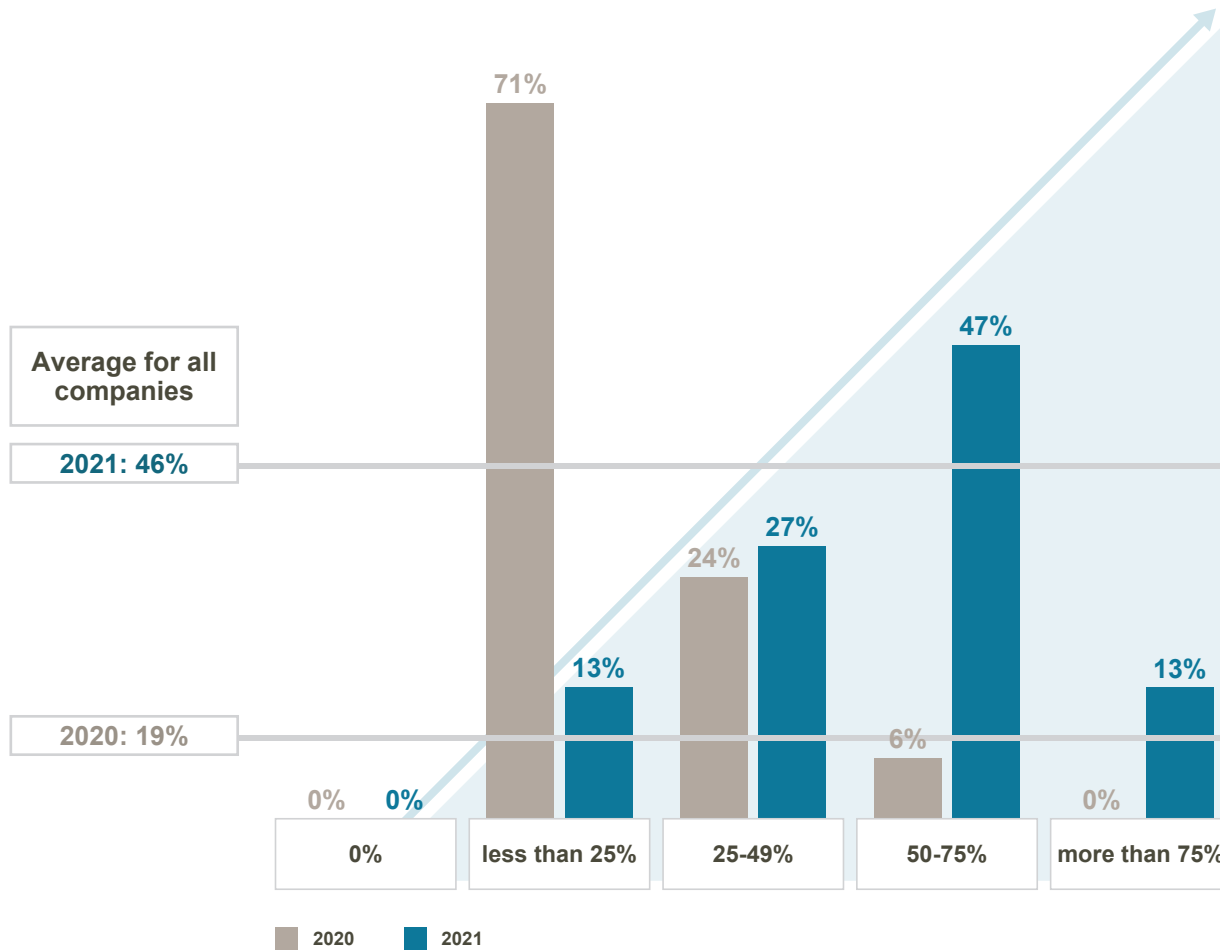
## What do you believe would most help the “bounce back” of exhibitions?



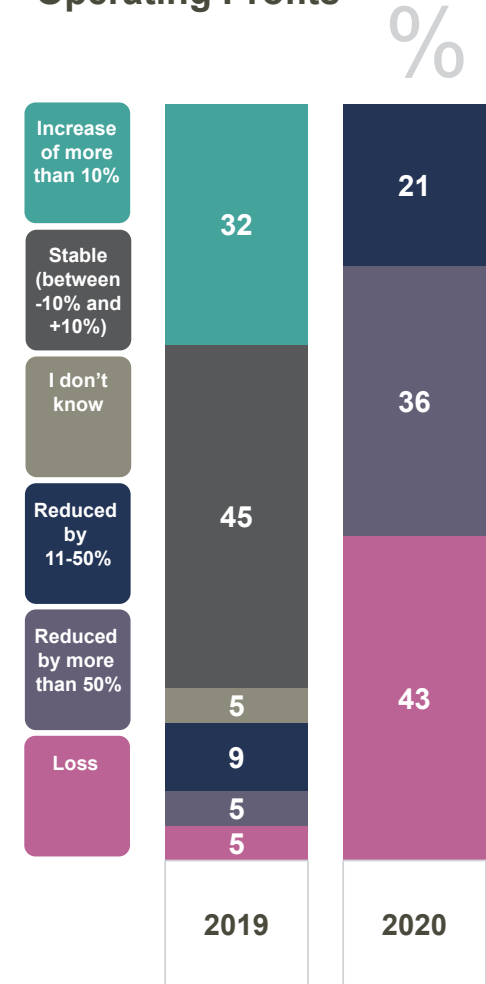


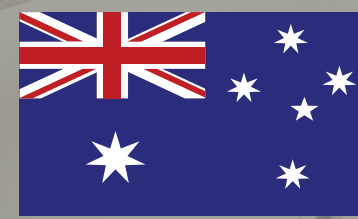


## Revenue compared to 2019

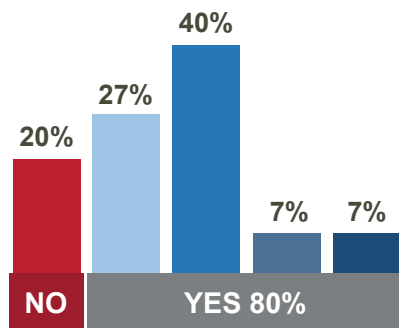


## Operating Profits

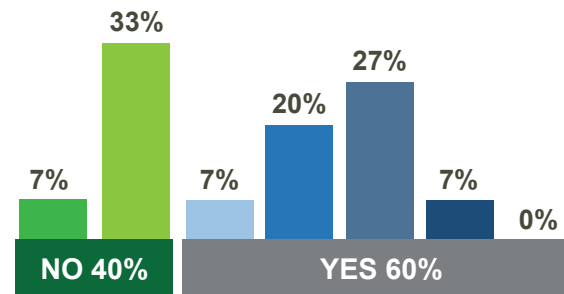




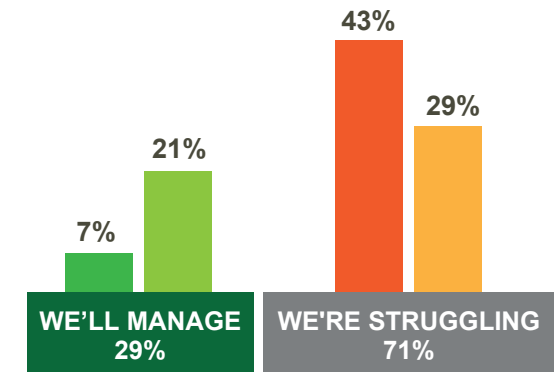
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

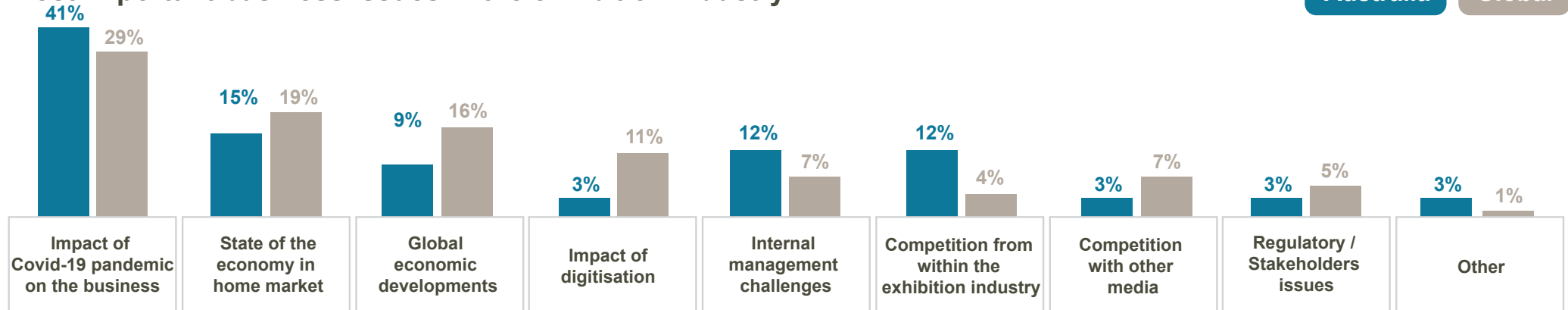
# Detailed results for Australia



## Most important business issues in the exhibition industry

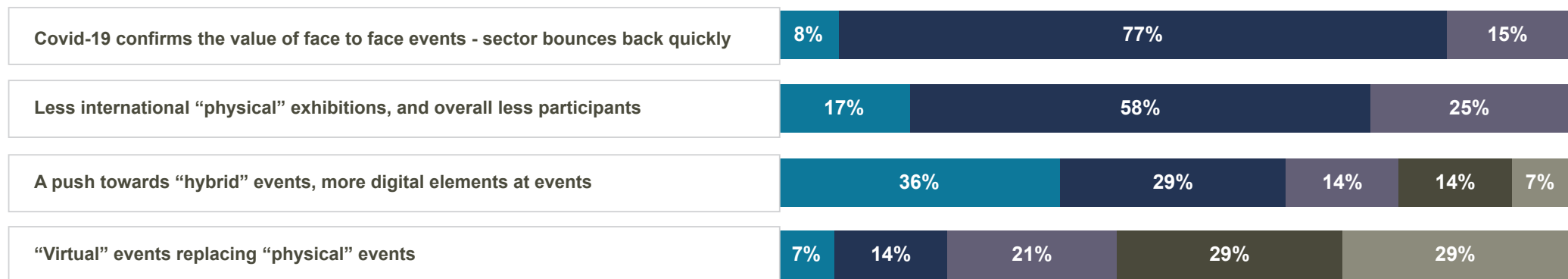
Australia

Global



## Format of exhibitions in the coming years

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

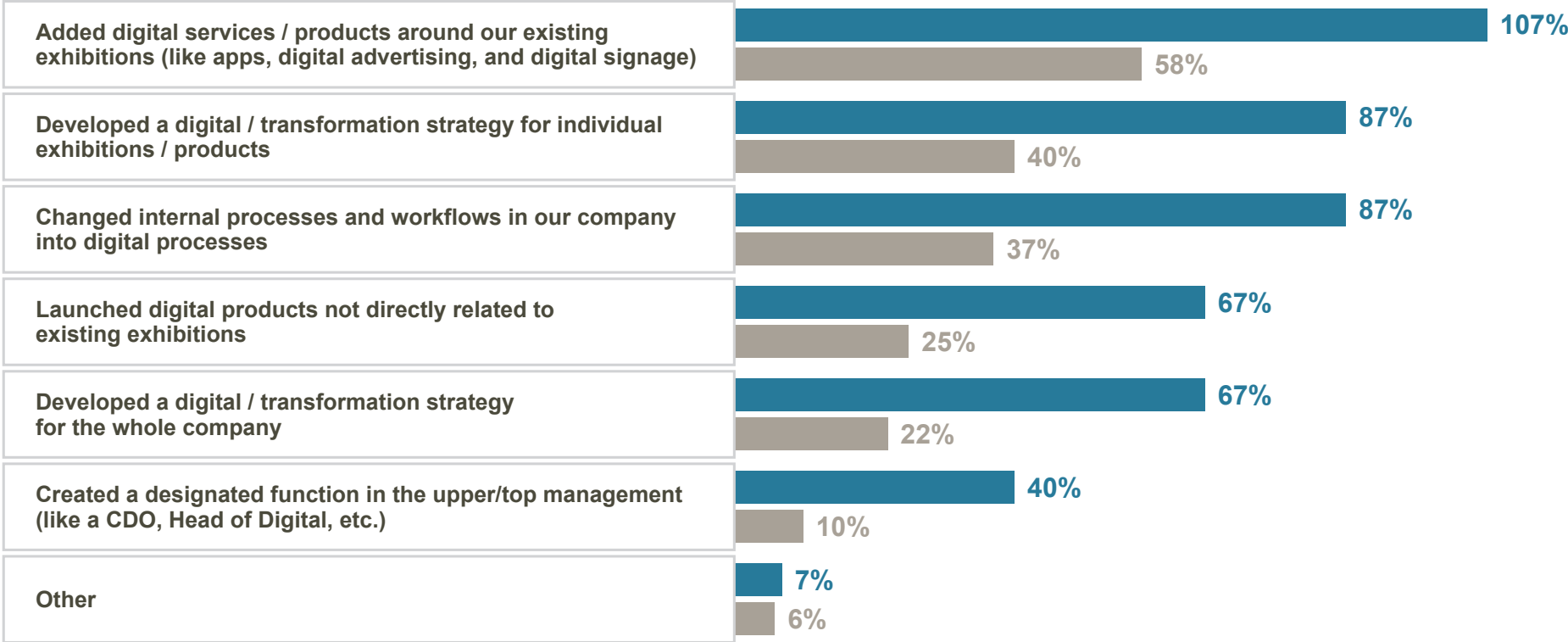




Australia

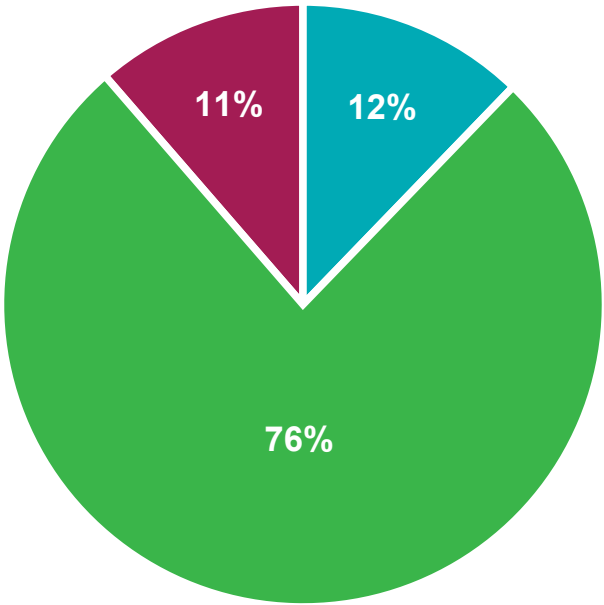
Global

## Digitisation: implementation in Australia and globally



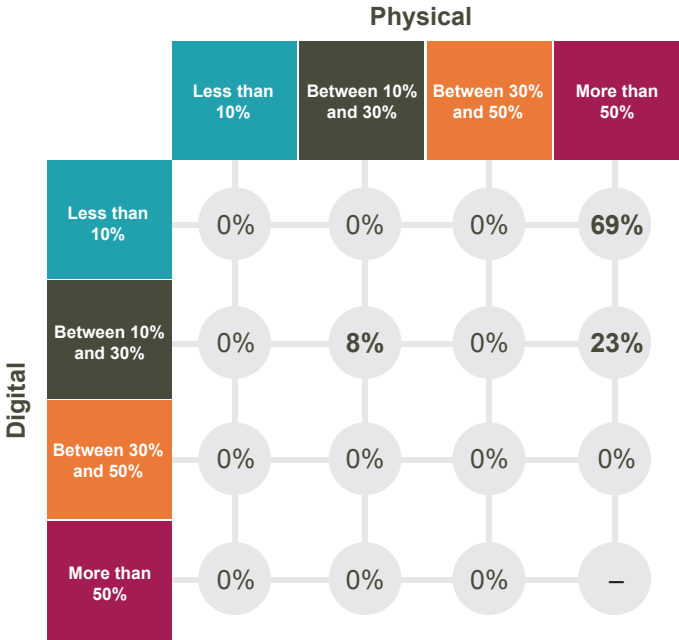


Number of fairs projected in 2021



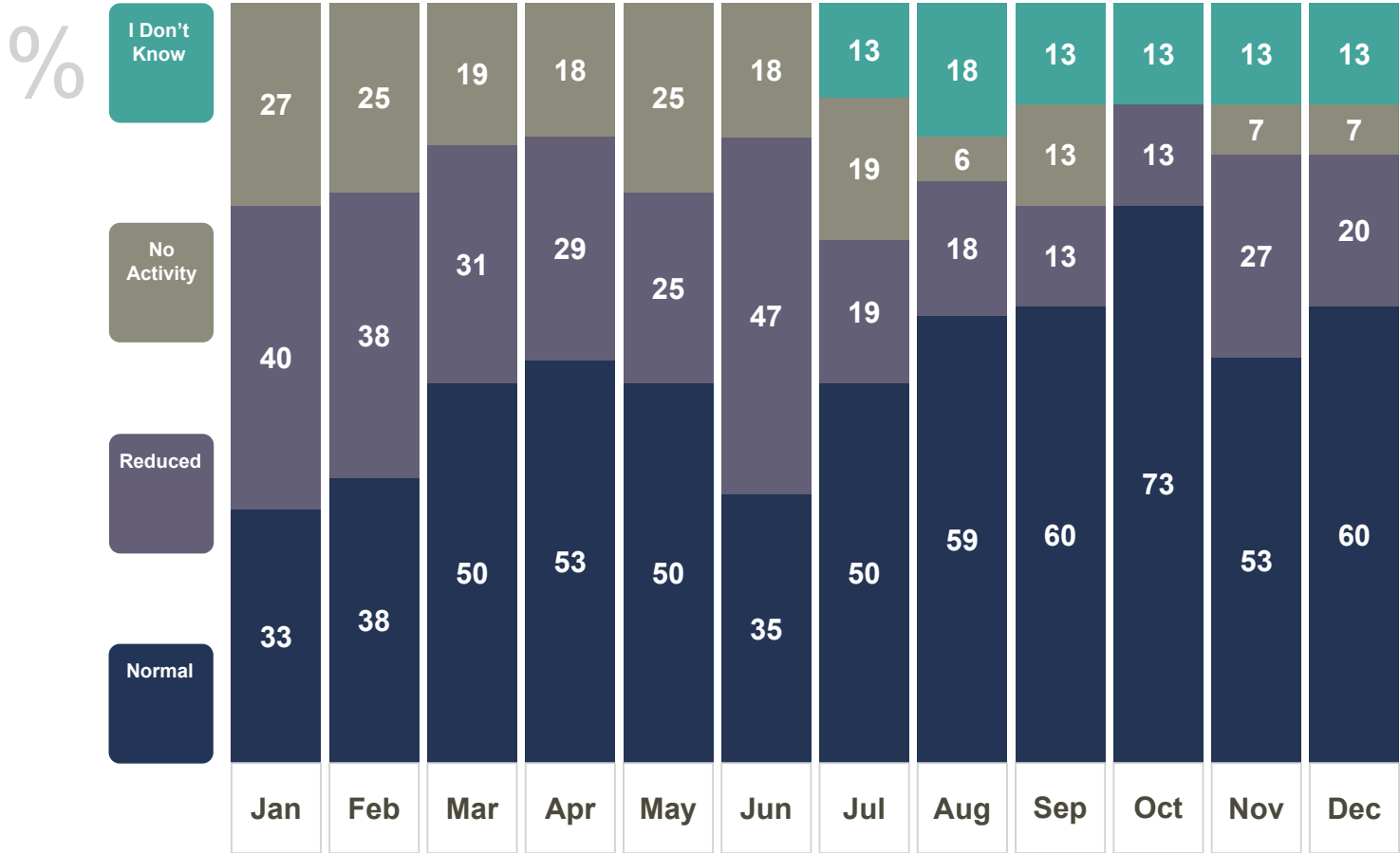
■ Digital ■ Physical ■ Hybrid

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



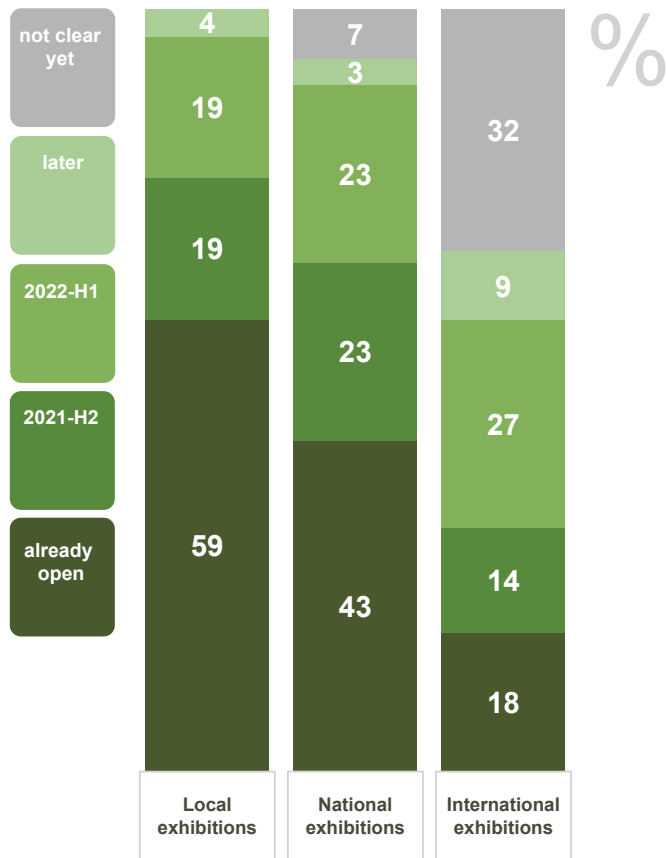


## Situation of industry operations in 2021

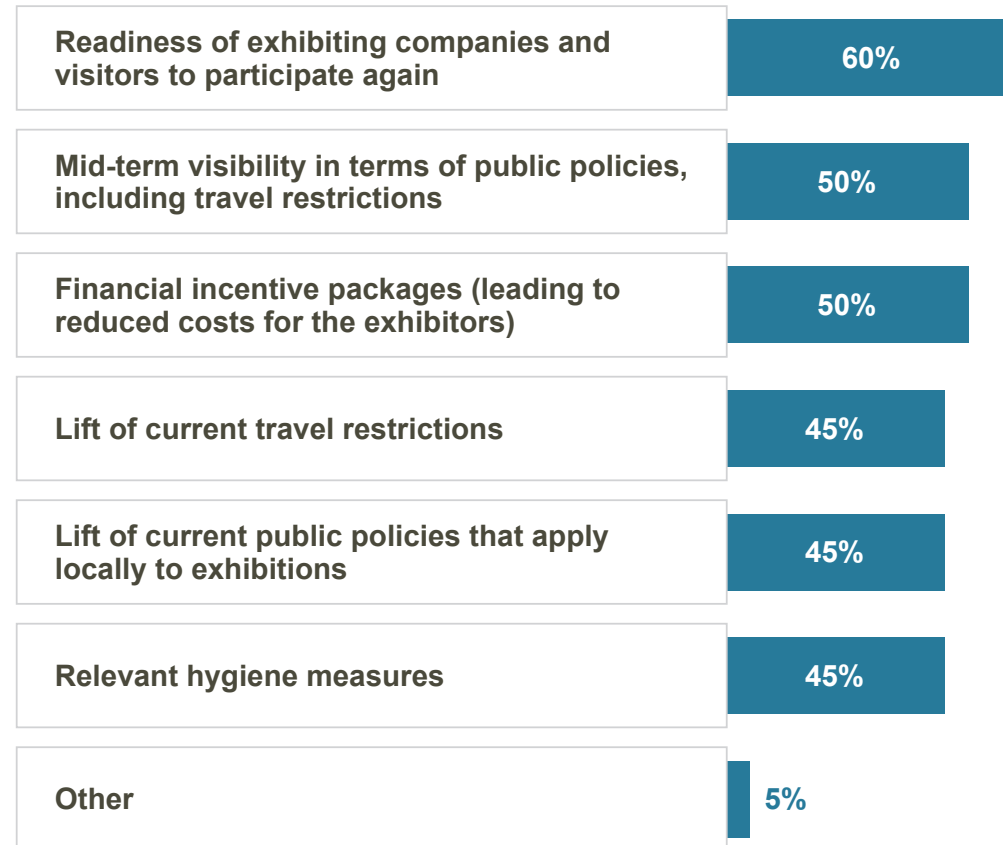




## When do you believe exhibitions will open again in your city?

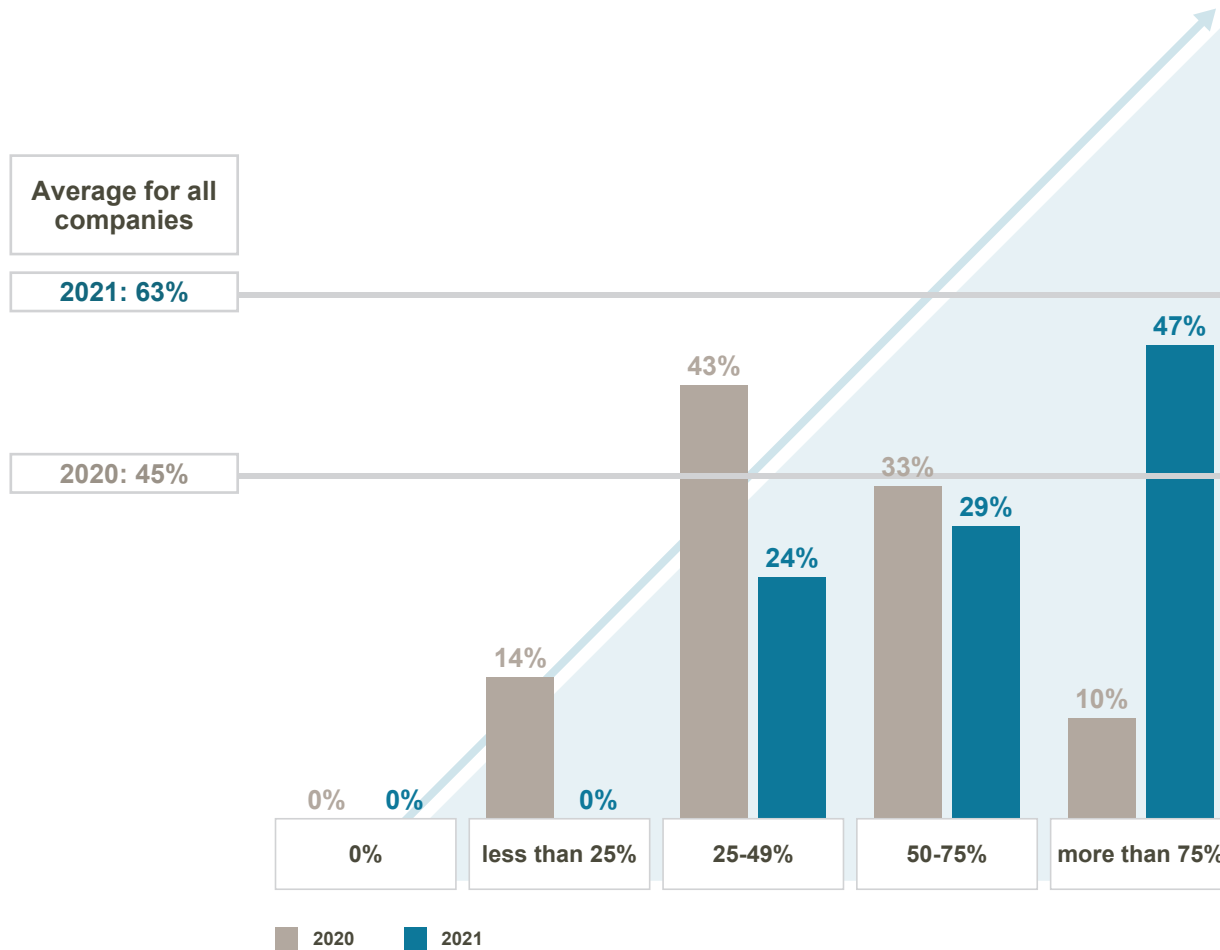


## What do you believe would most help the “bounce back” of exhibitions?

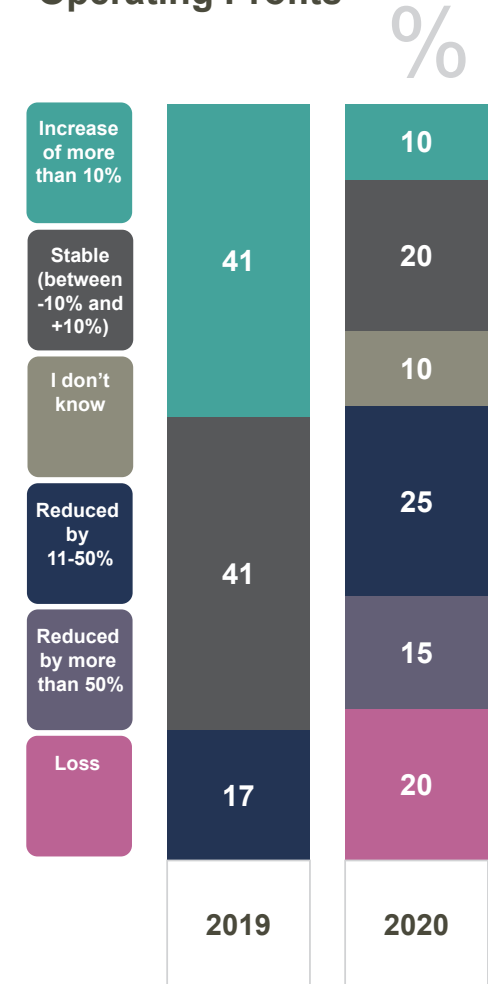




## Revenue compared to 2019



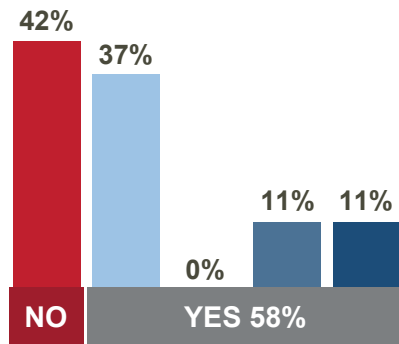
## Operating Profits



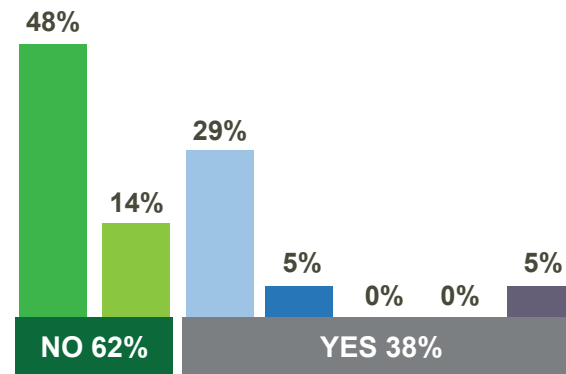




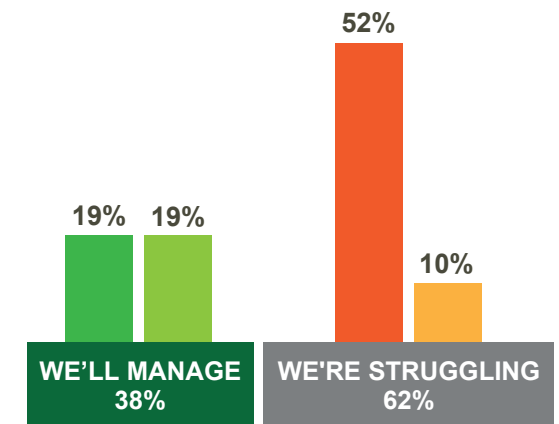
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

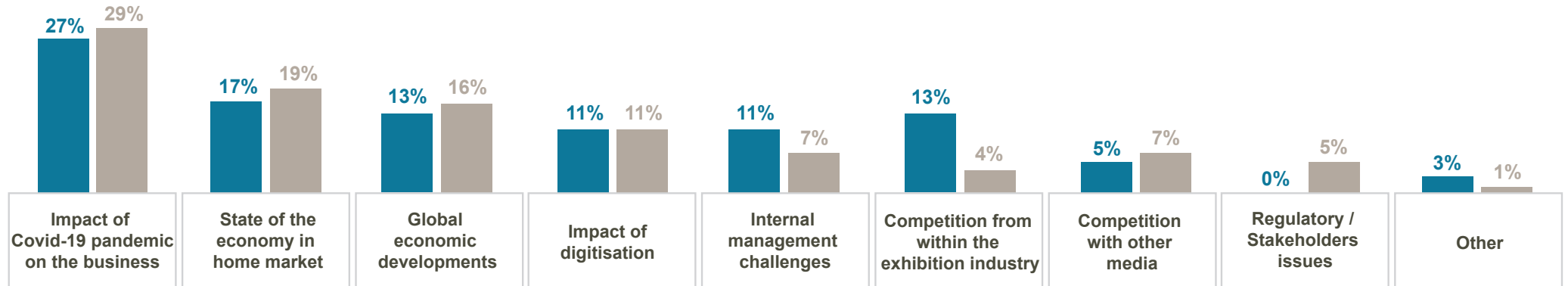
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for China



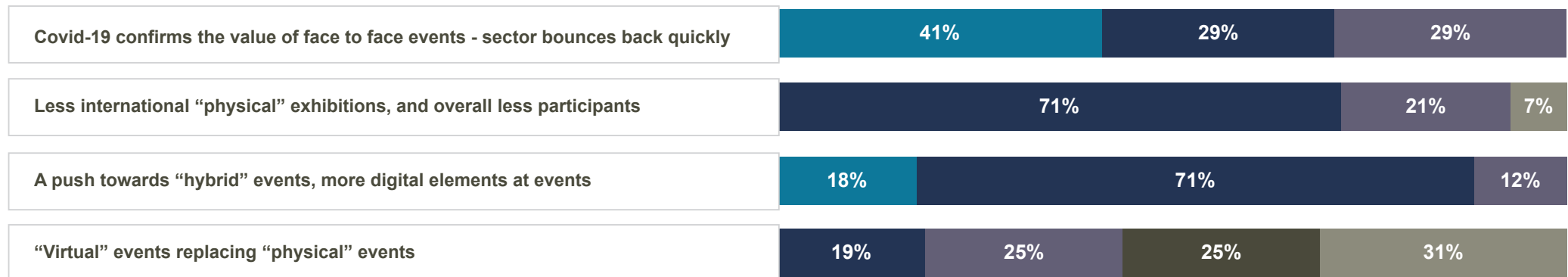
## Most important business issues in the exhibition industry

China Global



## Format of exhibitions in the coming years

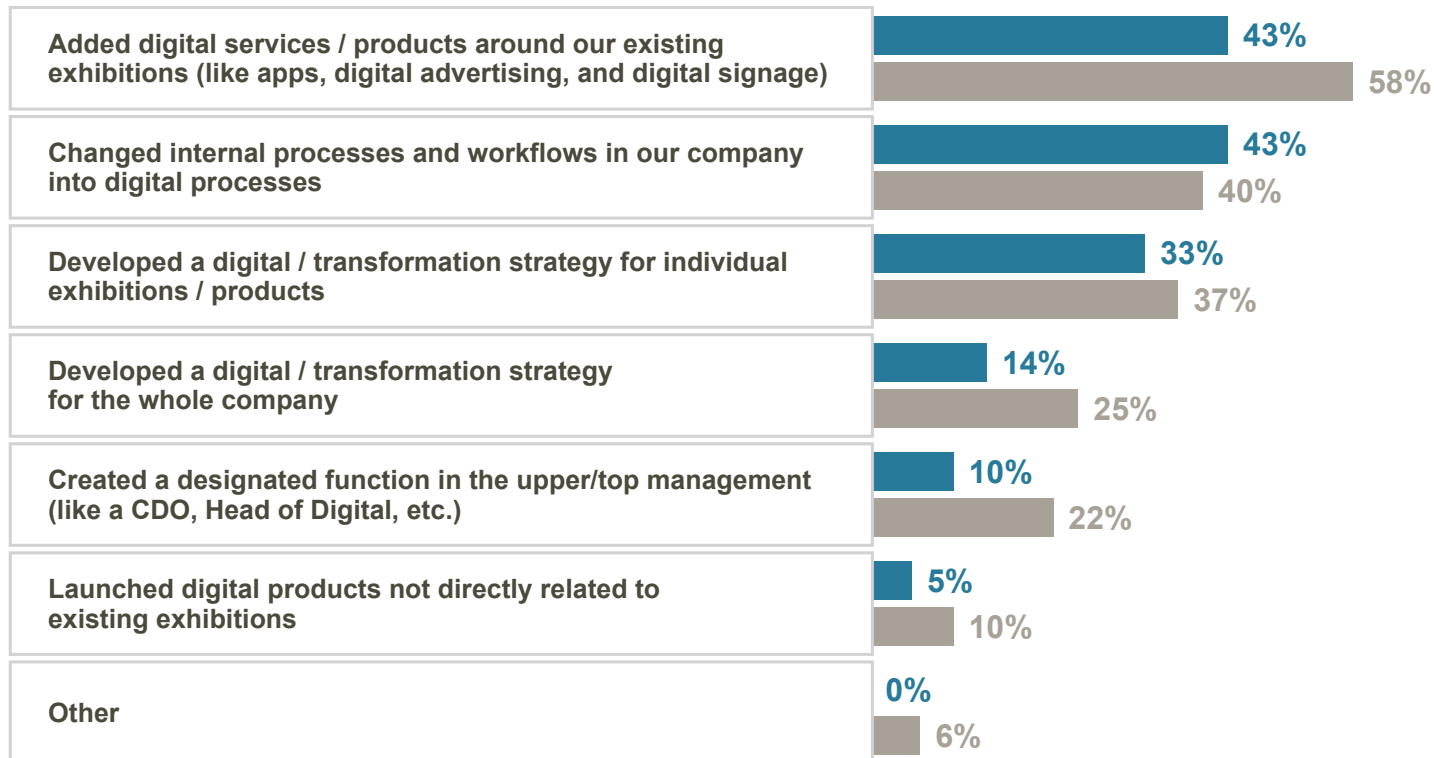
Yes, for sure Most probably Not sure Not sure at all Definitely not





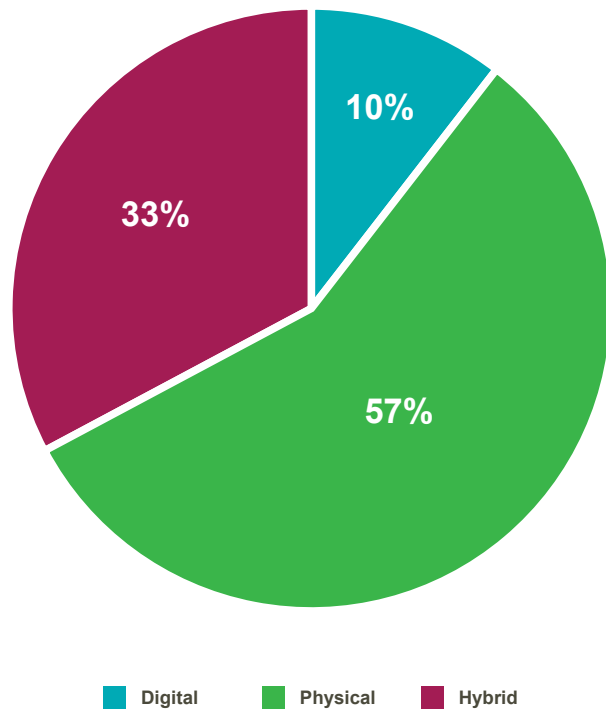
China Global

## Digitisation: implementation in China and globally

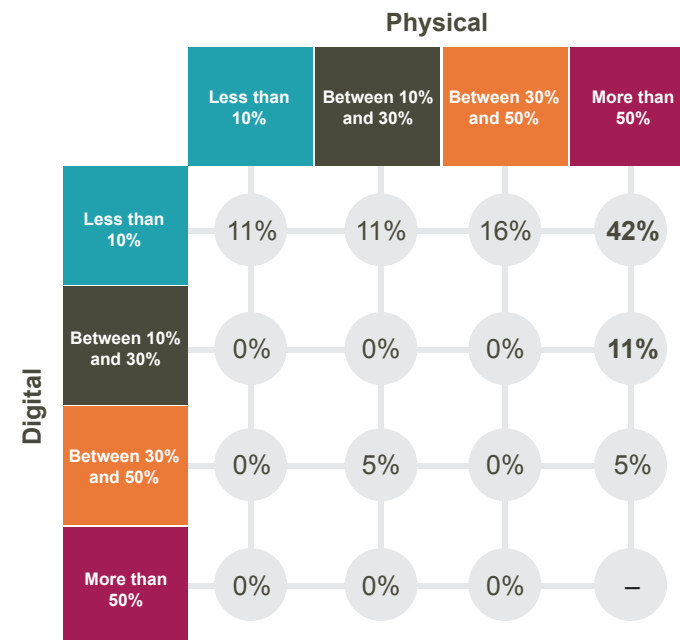


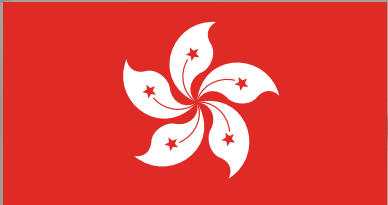


## Number of fairs projected in 2021

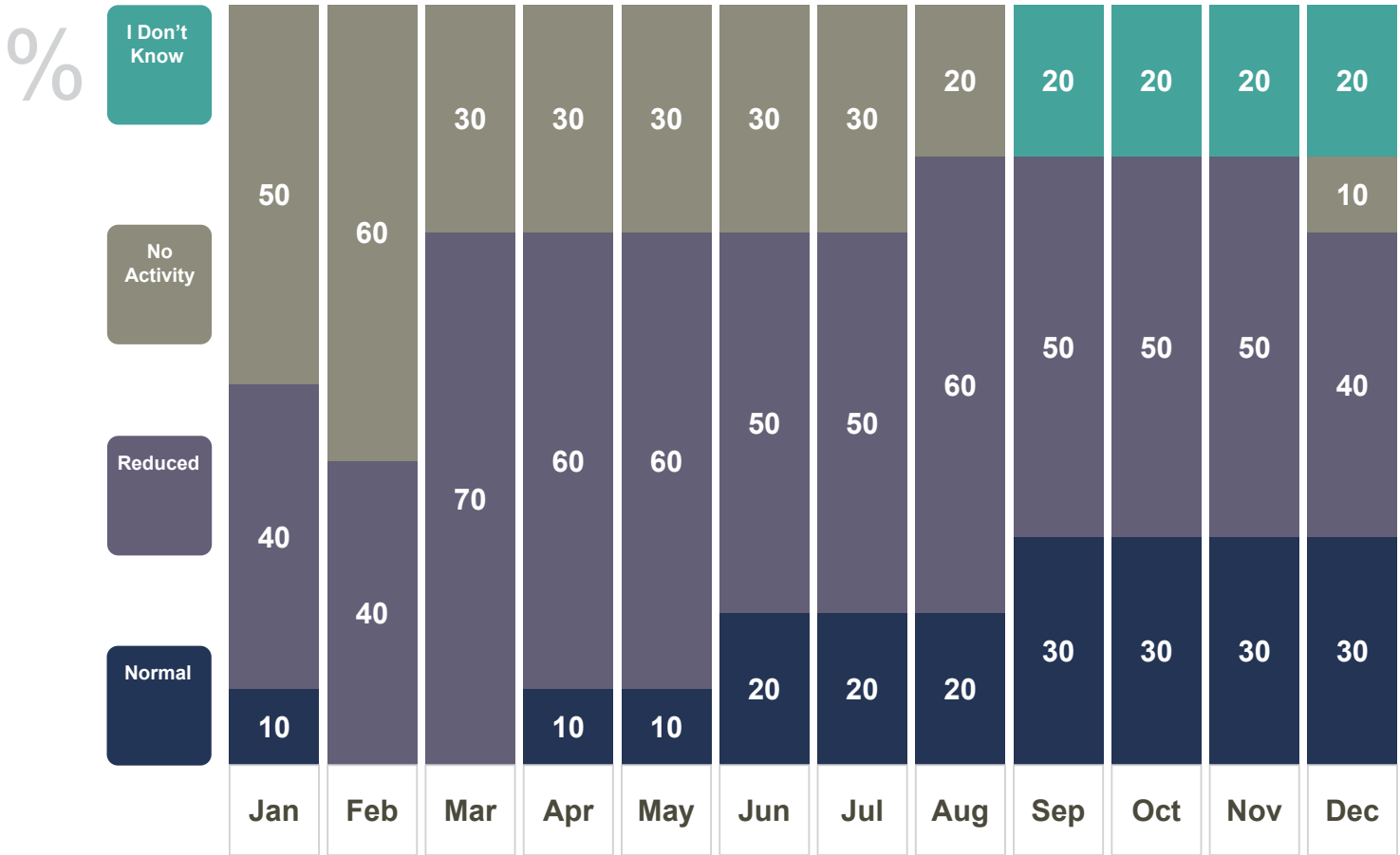


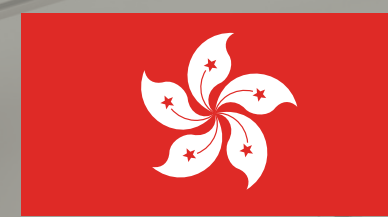
## Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



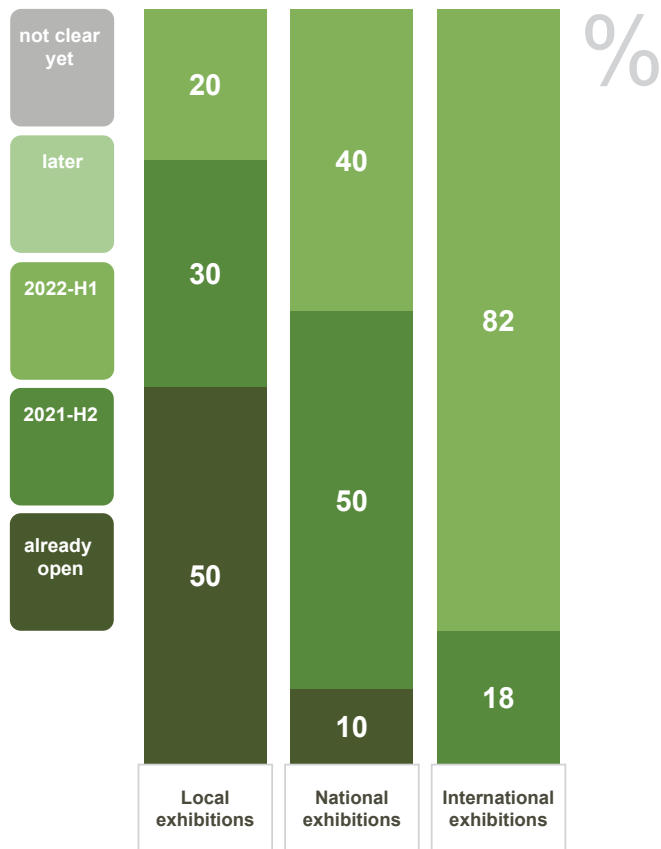


## Situation of industry operations in 2021

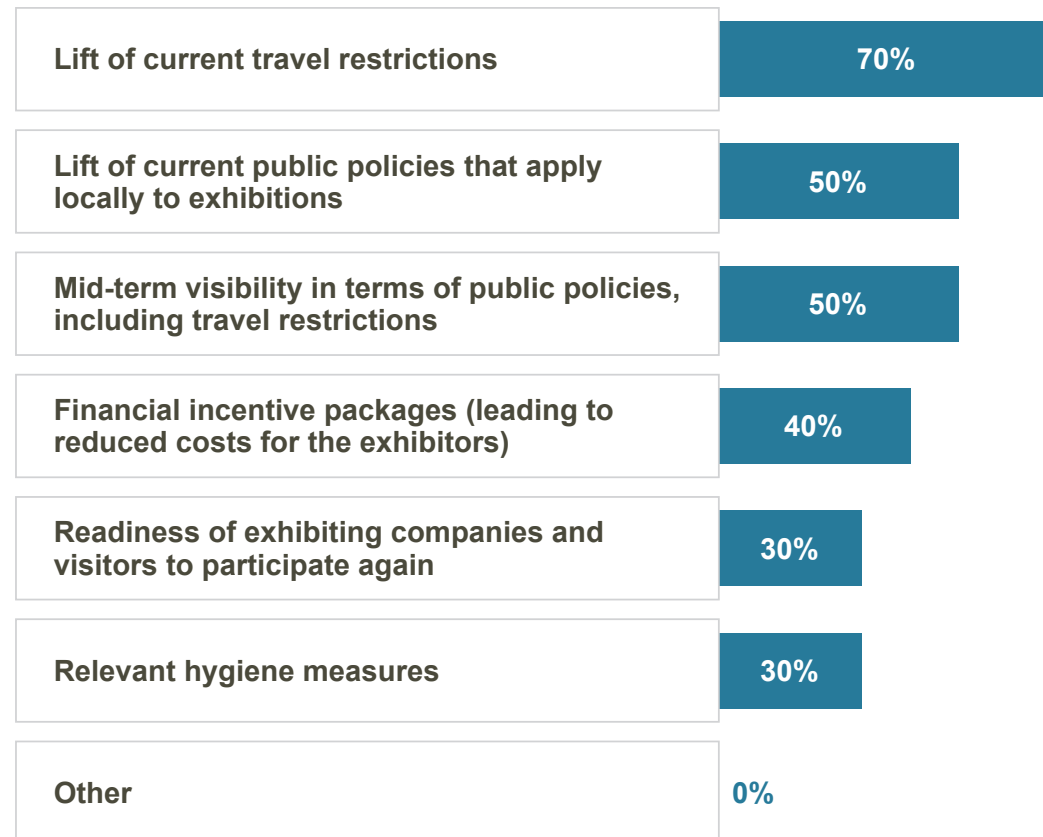


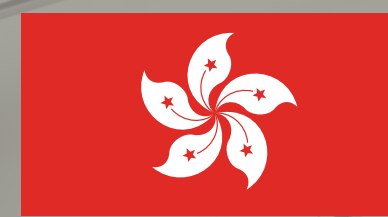


## When do you believe exhibitions will open again in your city?

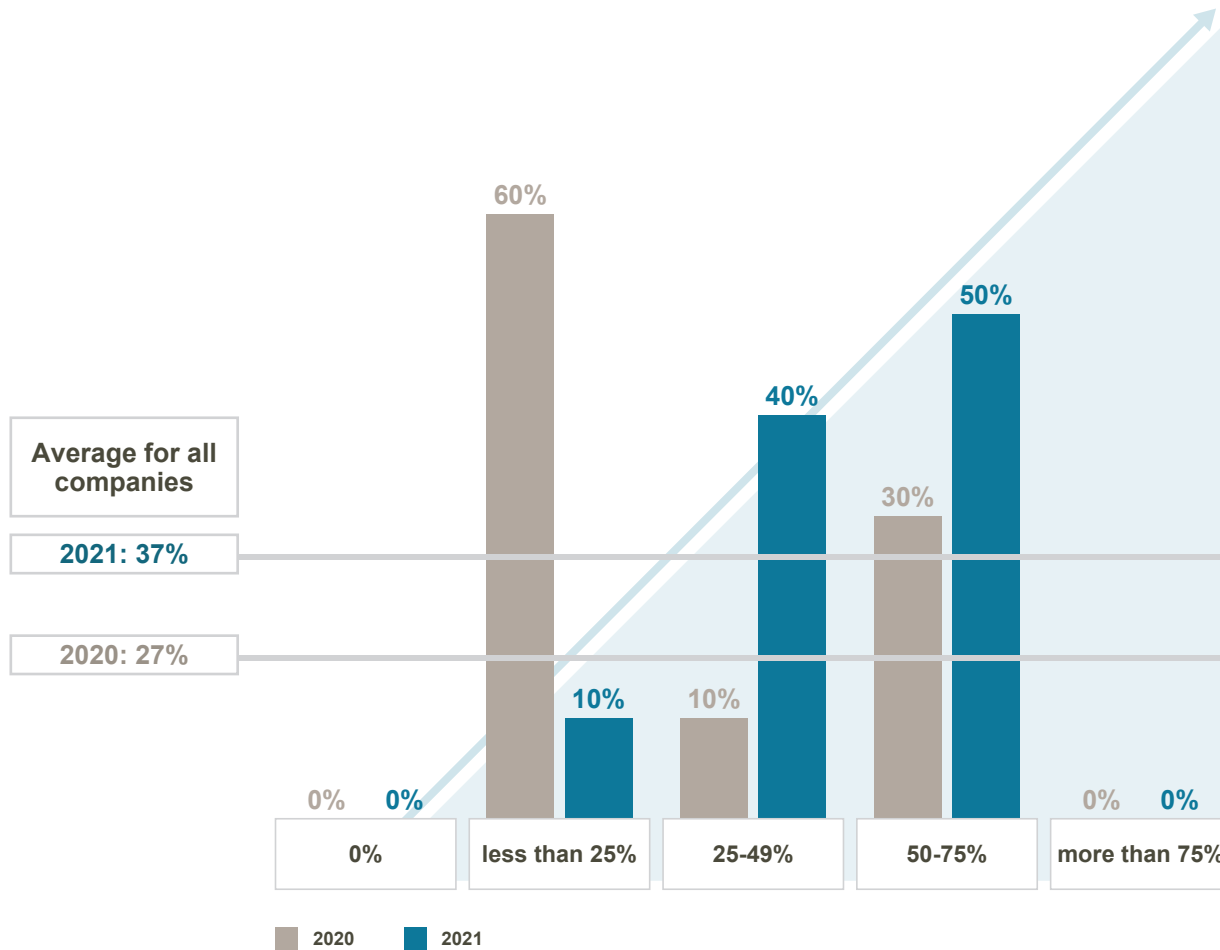


## What do you believe would most help the “bounce back” of exhibitions?

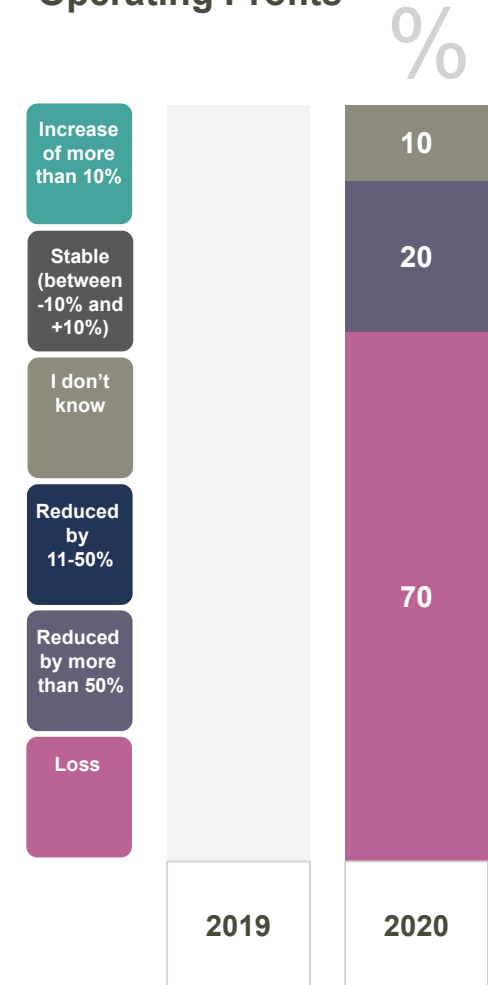


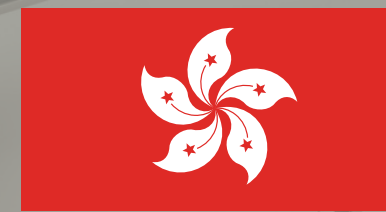


## Revenue compared to 2019

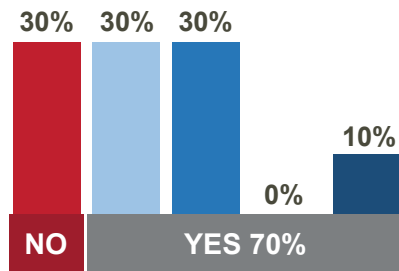


## Operating Profits

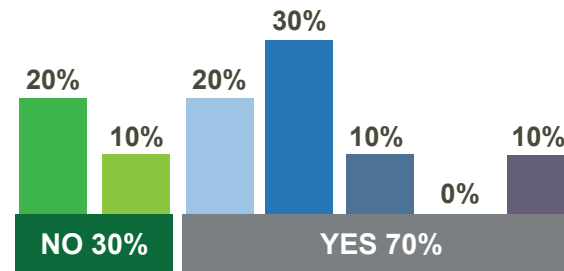




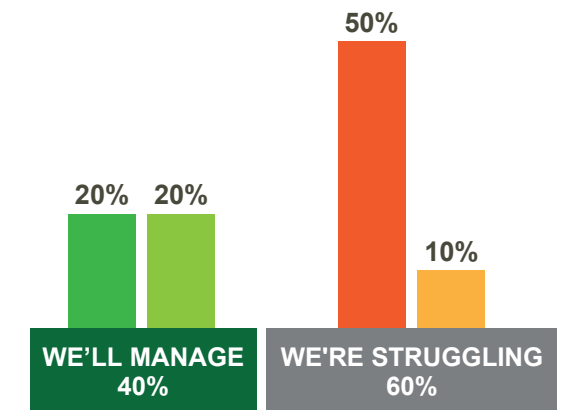
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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

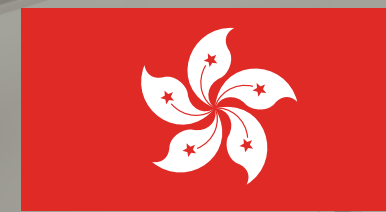


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- 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

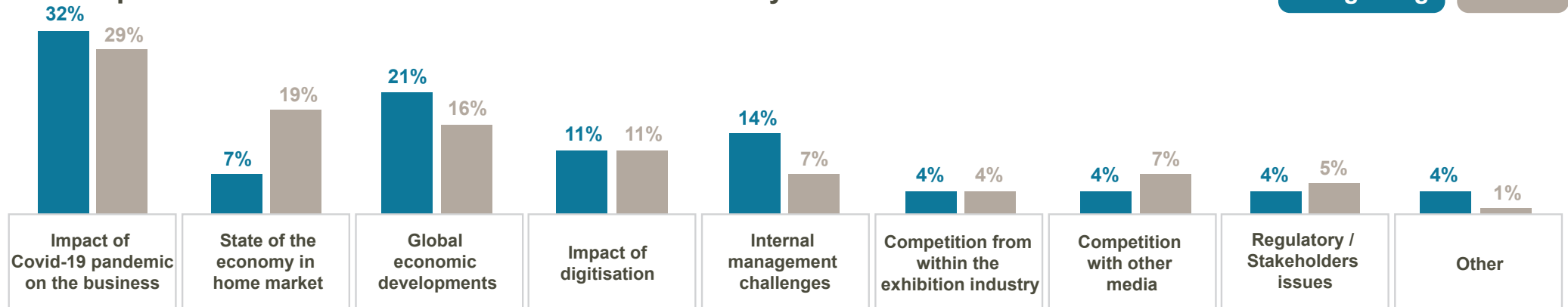
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down





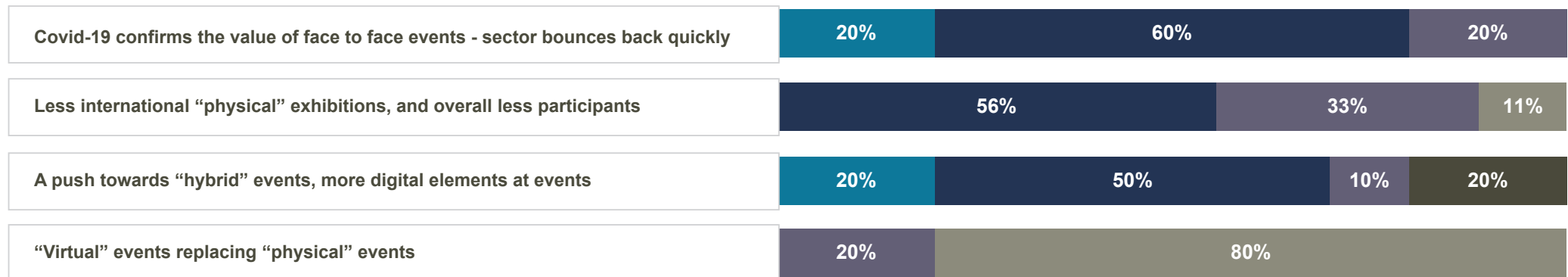
## Most important business issues in the exhibition industry

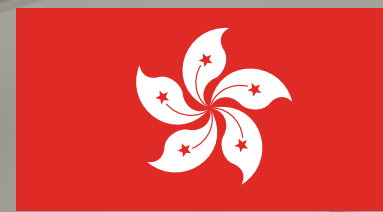
Hong Kong Global



## Format of exhibitions in the coming years

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

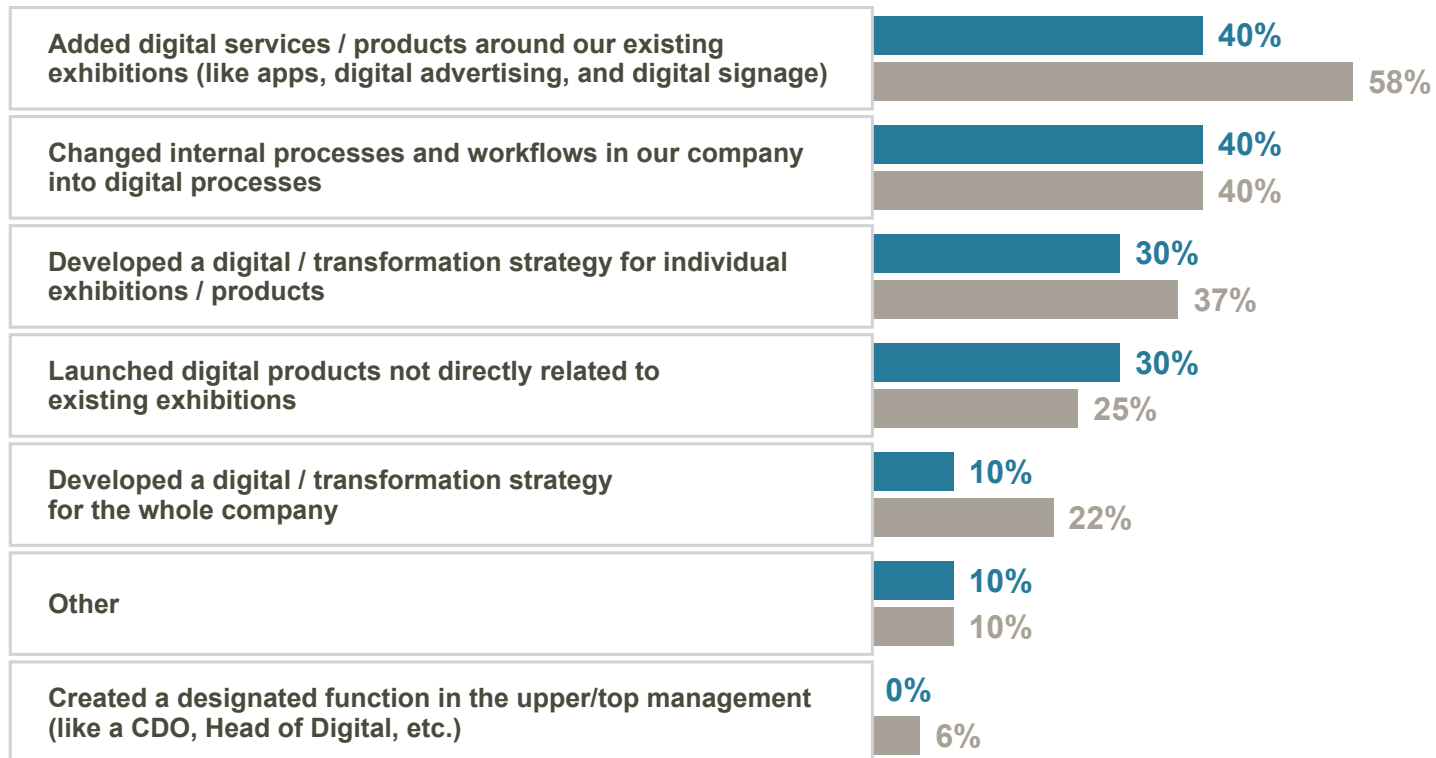


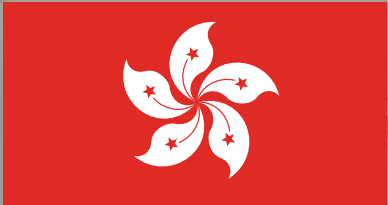


Hong Kong

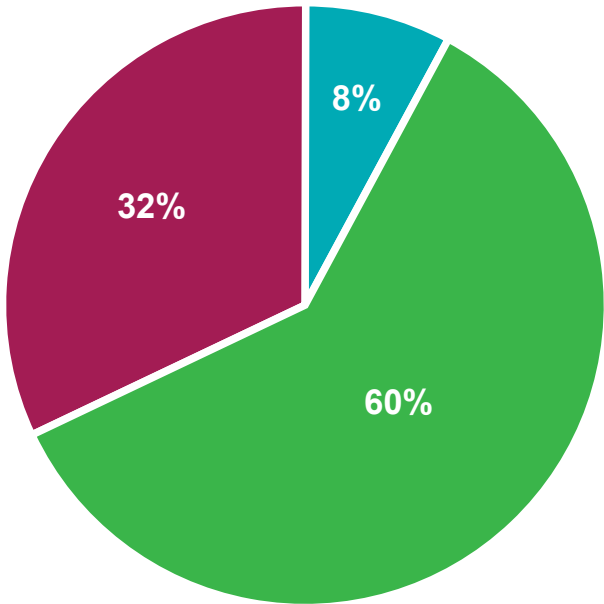
Global

## Digitisation: implementation in Hong Kong and globally



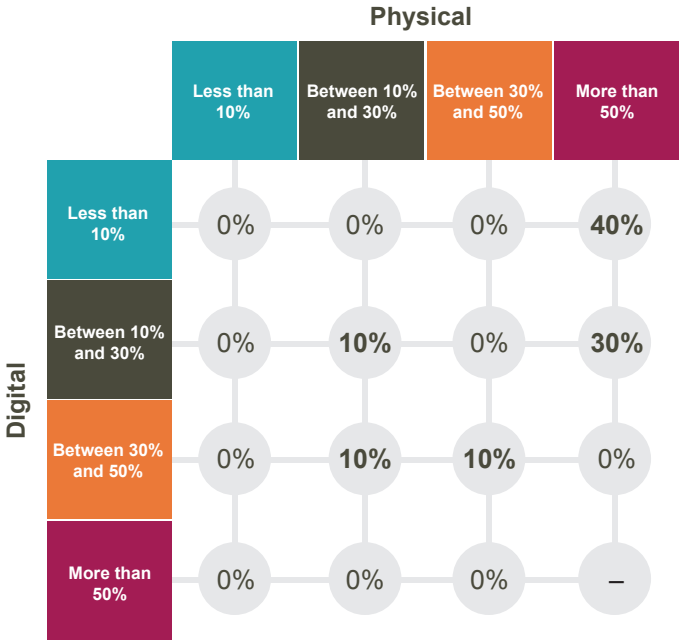


Number of fairs projected in 2021



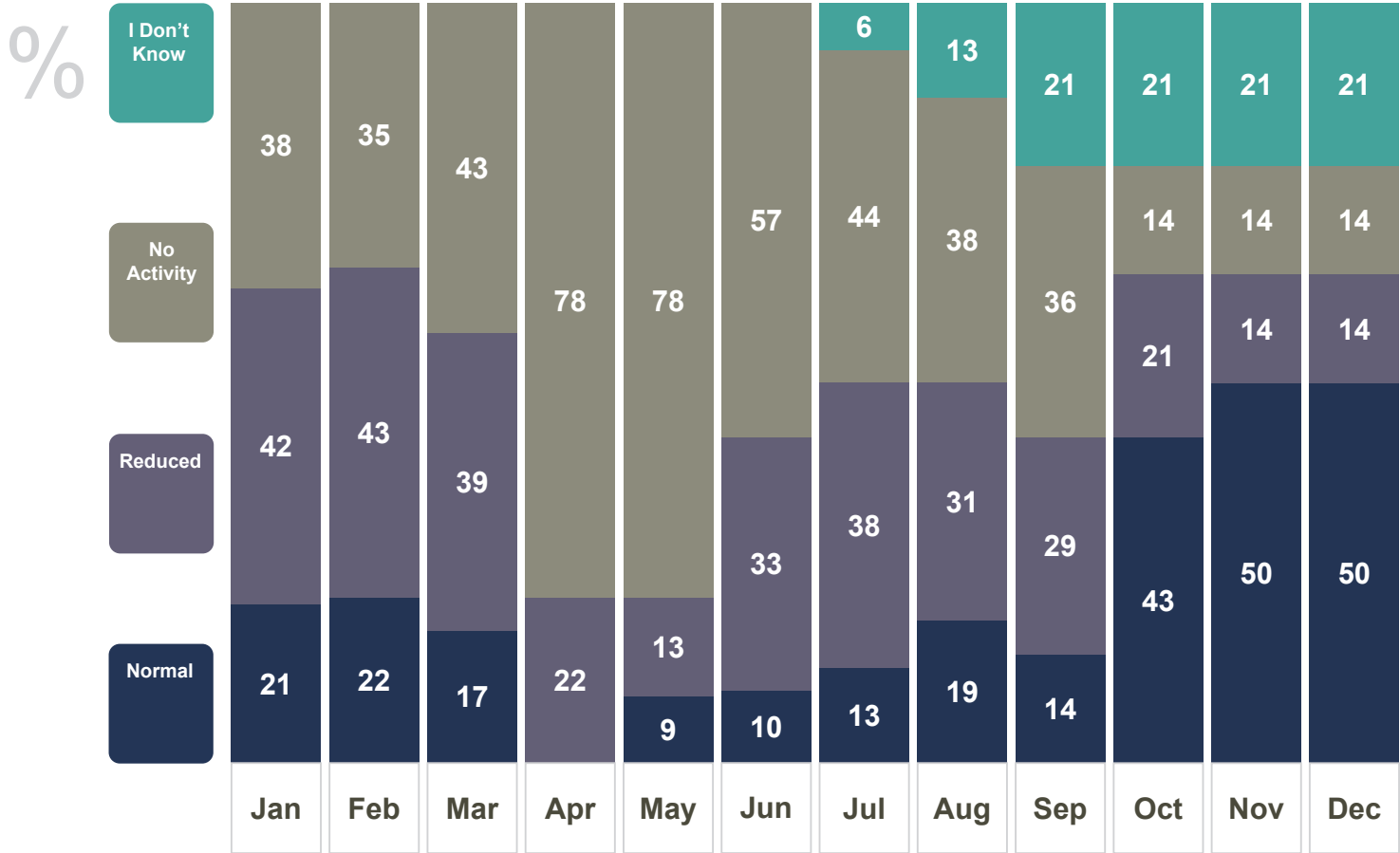
■ Digital   
 ■ Physical   
 ■ Hybrid

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



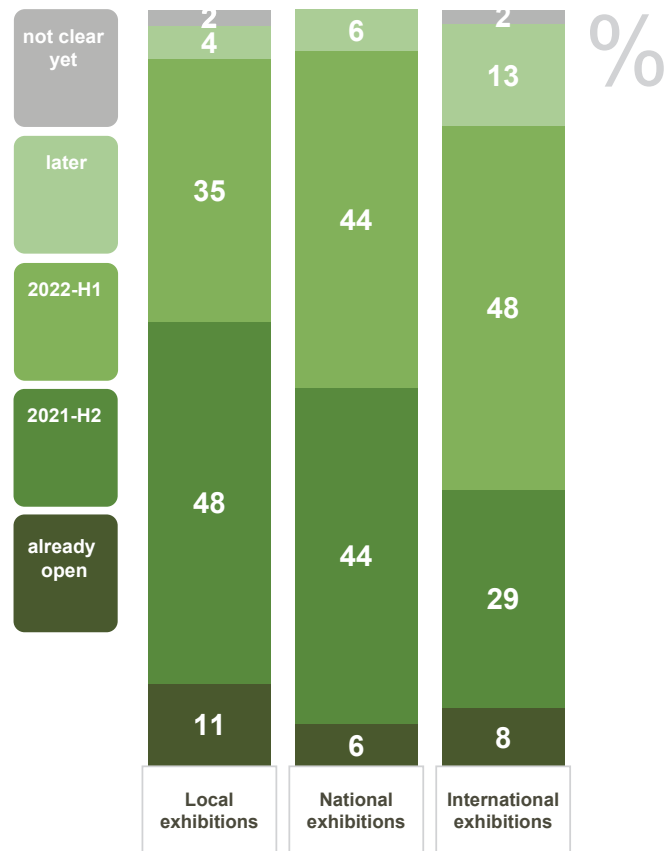


## Situation of industry operations in 2021

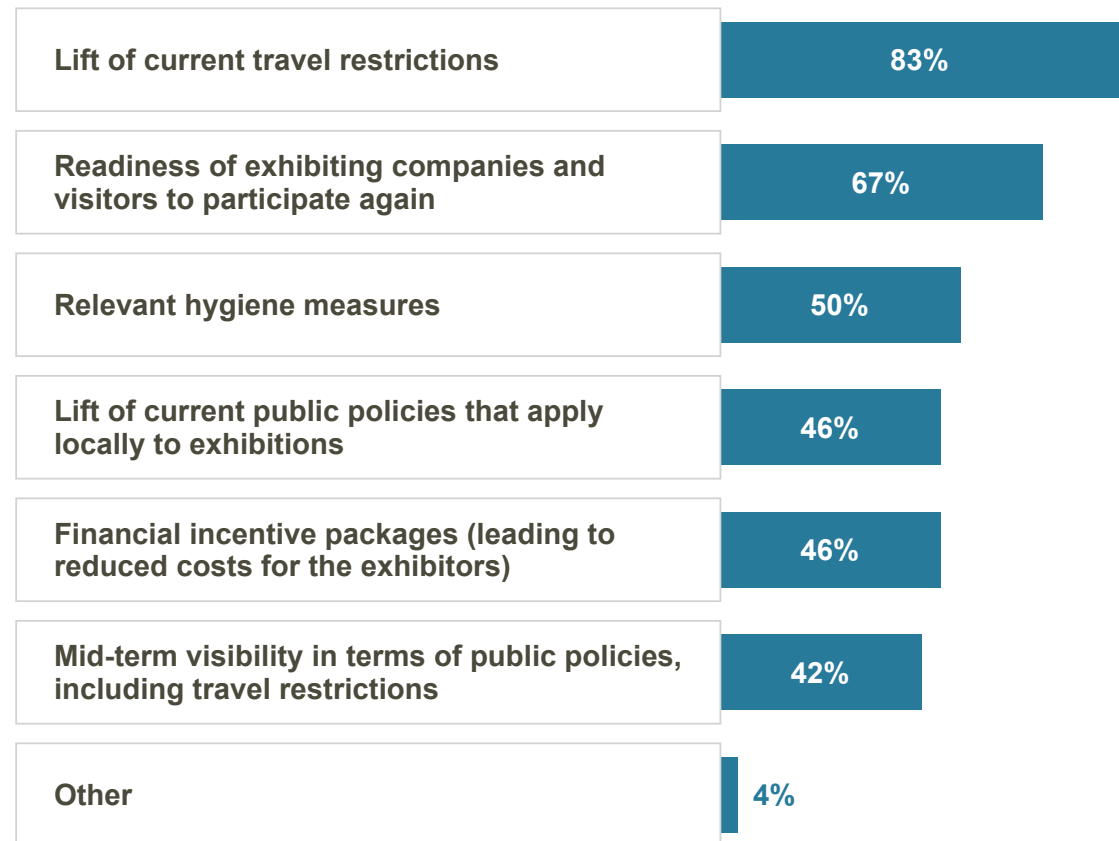




## When do you believe exhibitions will open again in your city?

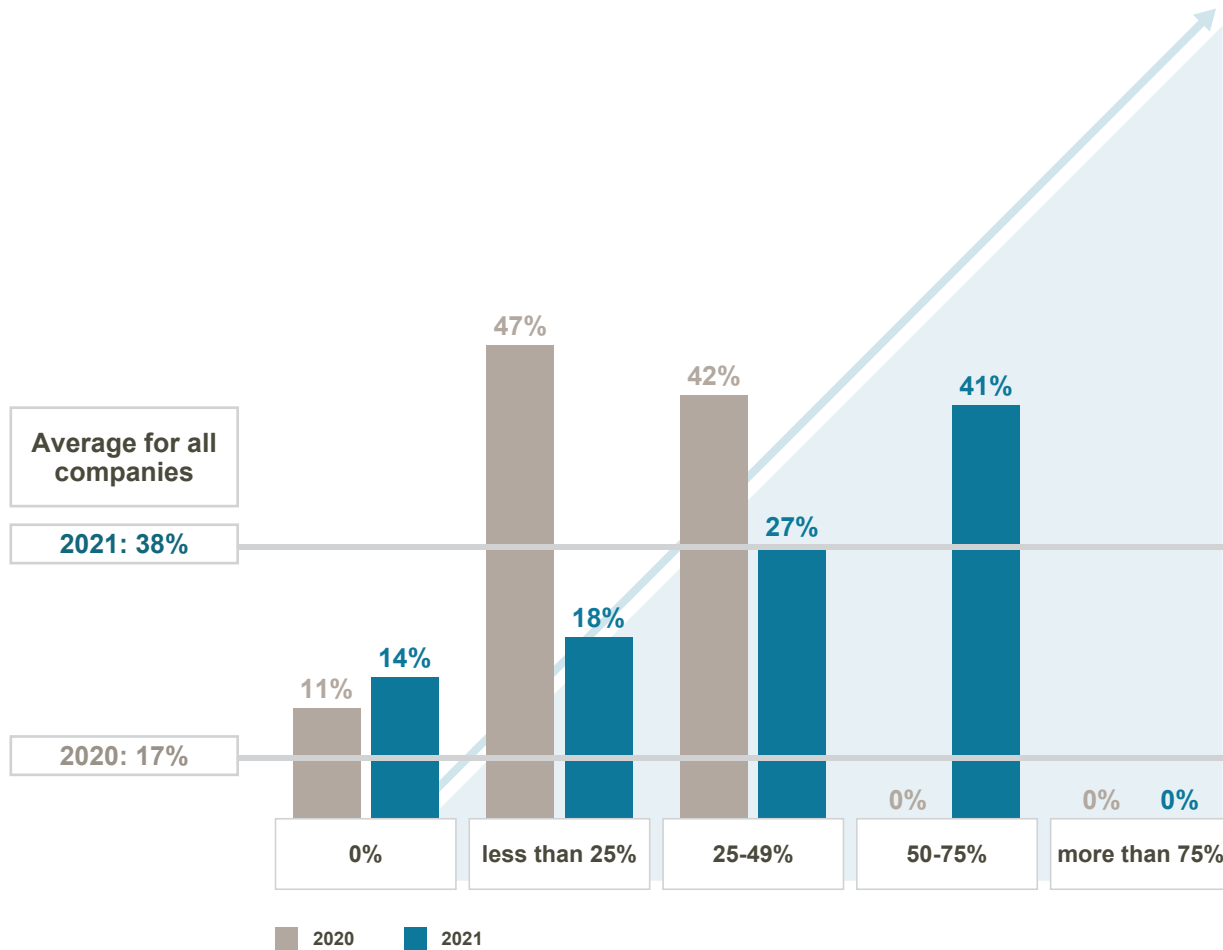


## What do you believe would most help the “bounce back” of exhibitions?

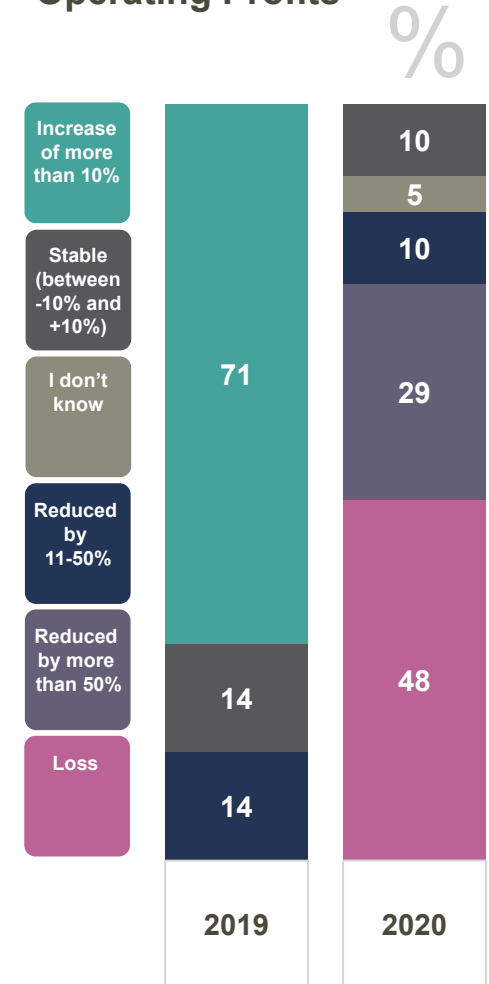




## Revenue compared to 2019

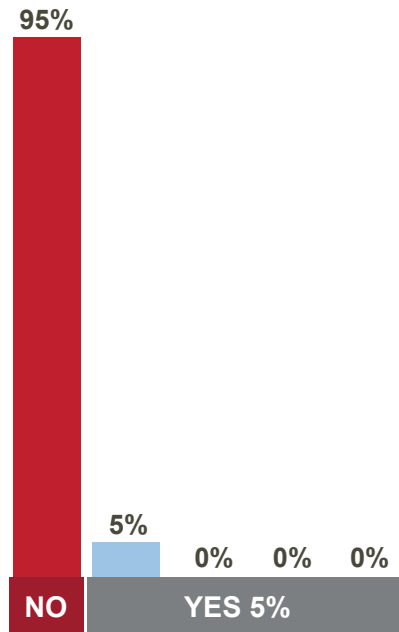


## Operating Profits

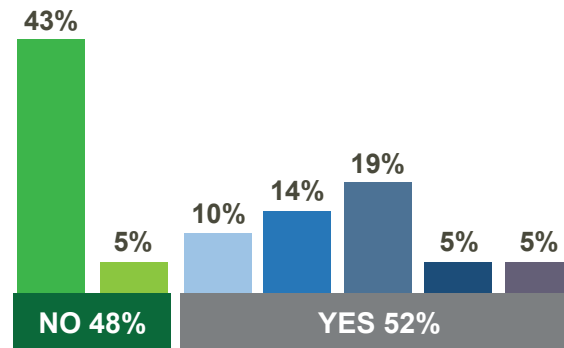




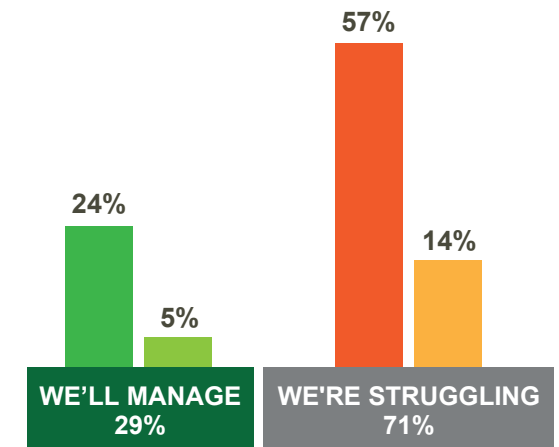
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

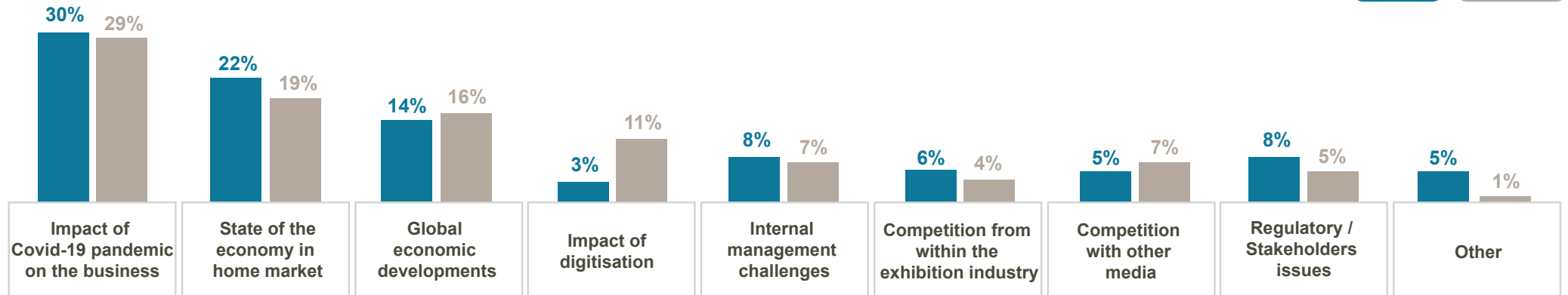
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



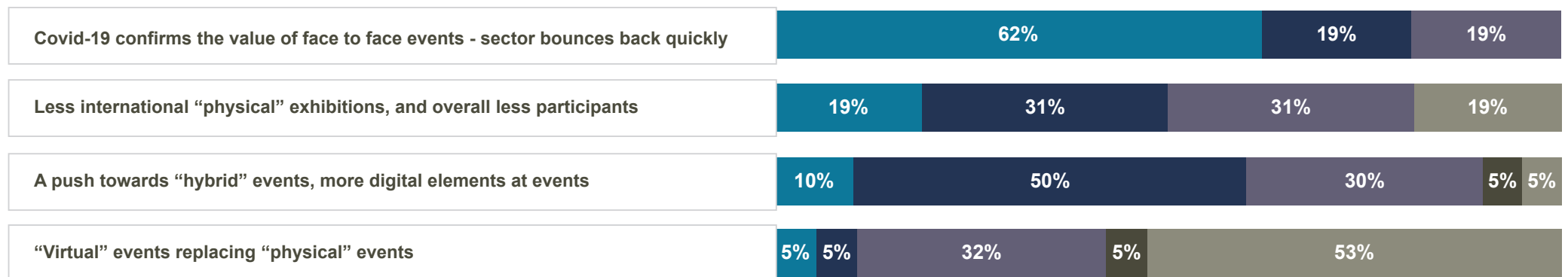
## Most important business issues in the exhibition industry

India Global



## Format of exhibitions in the coming years

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

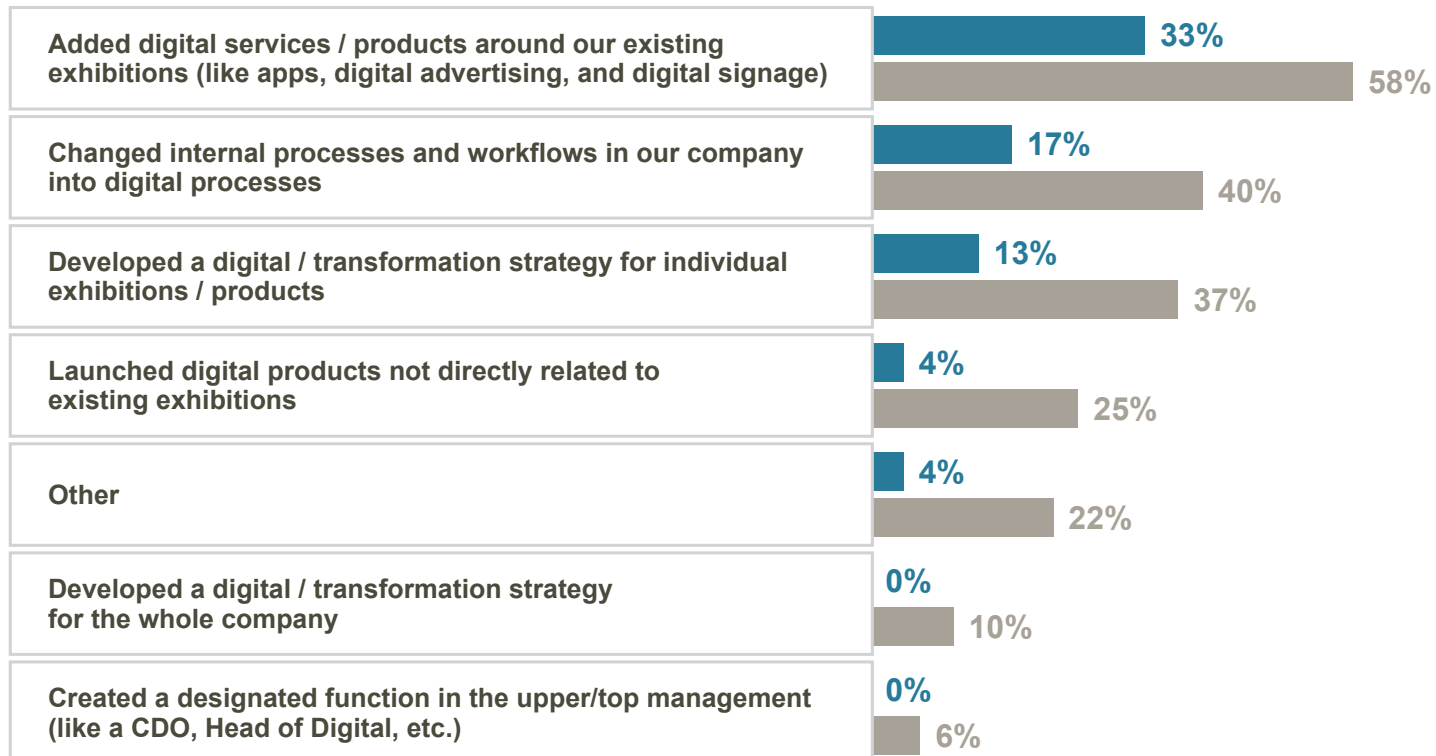






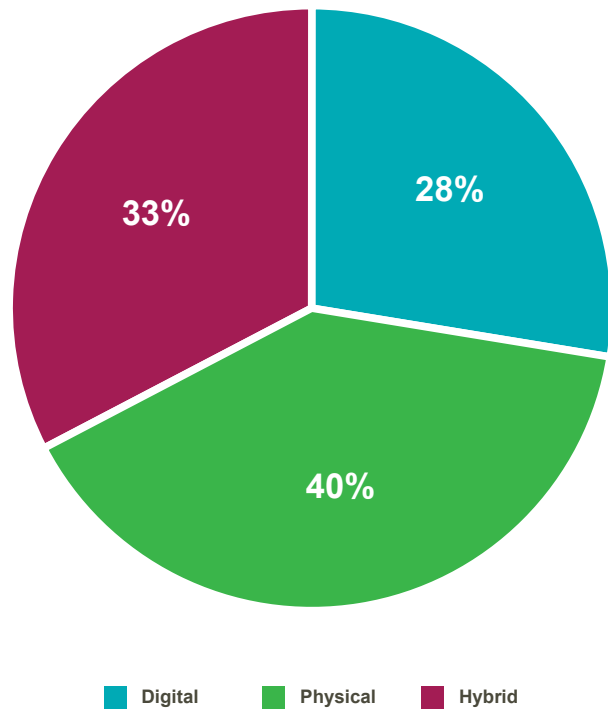
India Global

## Digitisation: implementation in India and globally

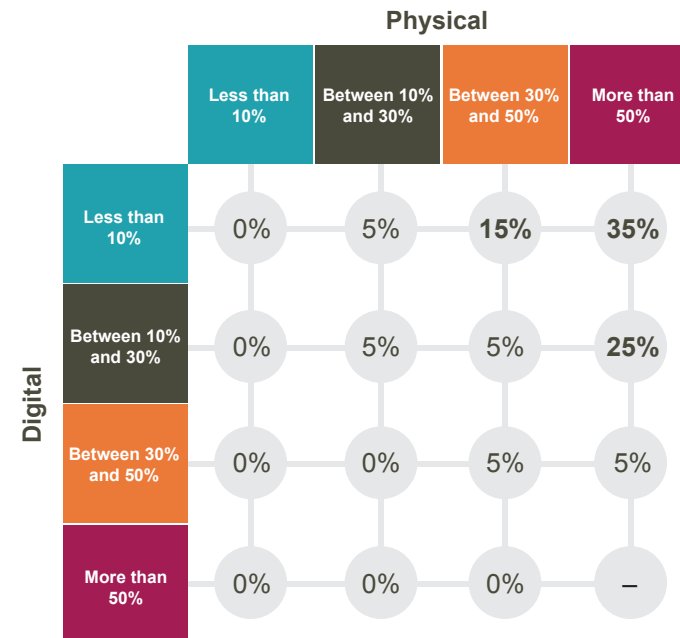


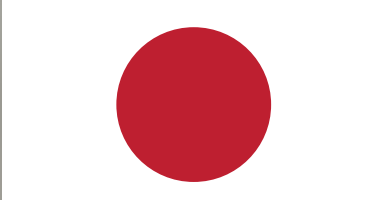


Number of fairs projected in 2021

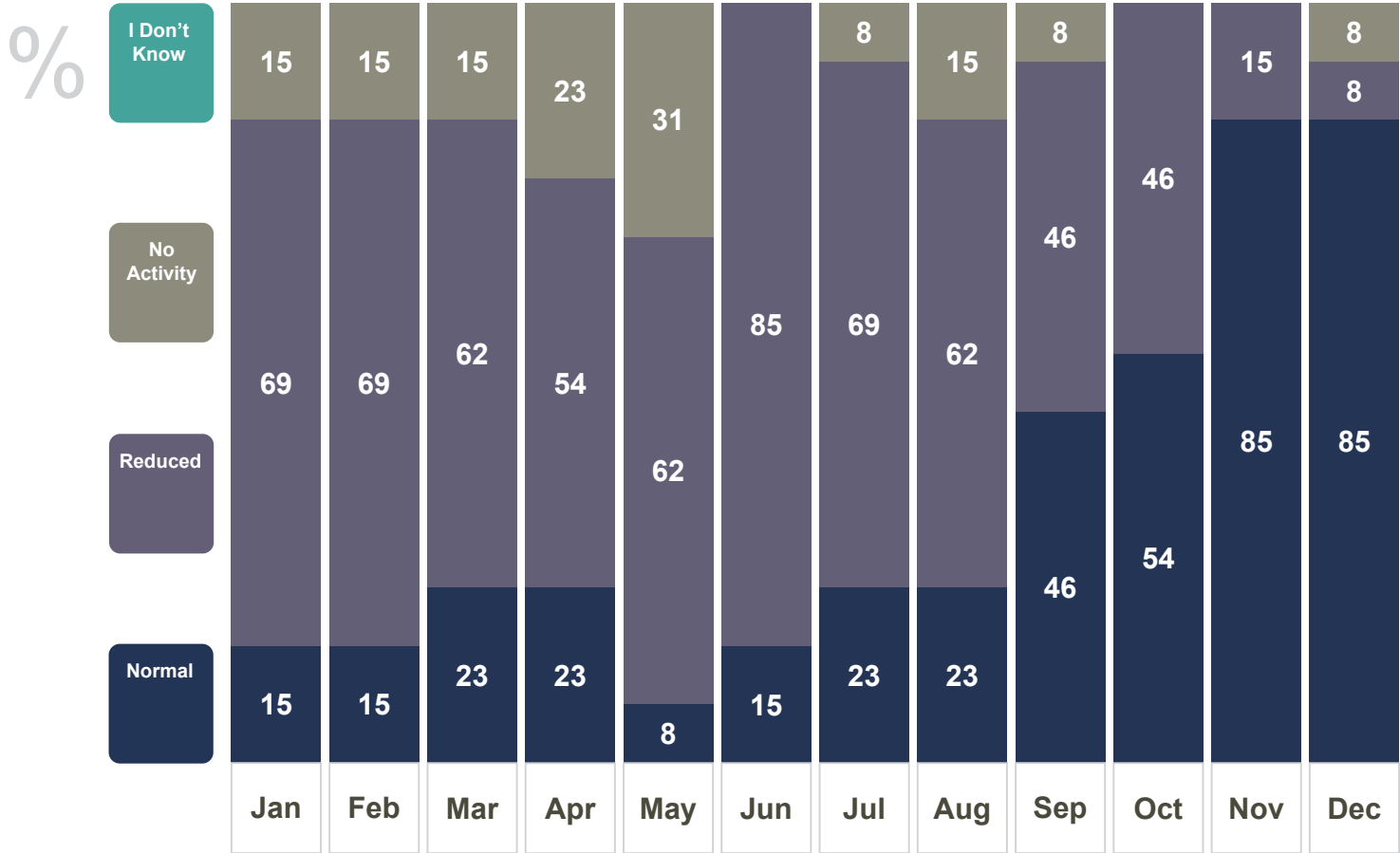


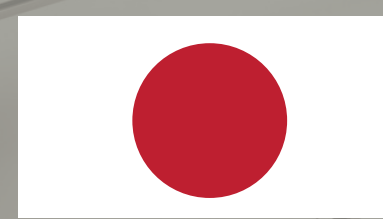
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



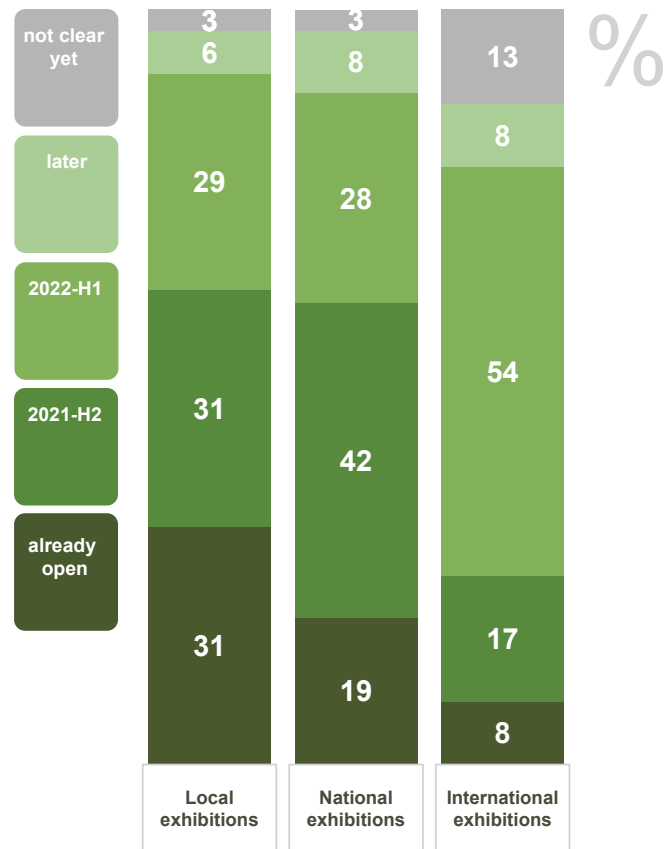


## Situation of industry operations in 2021

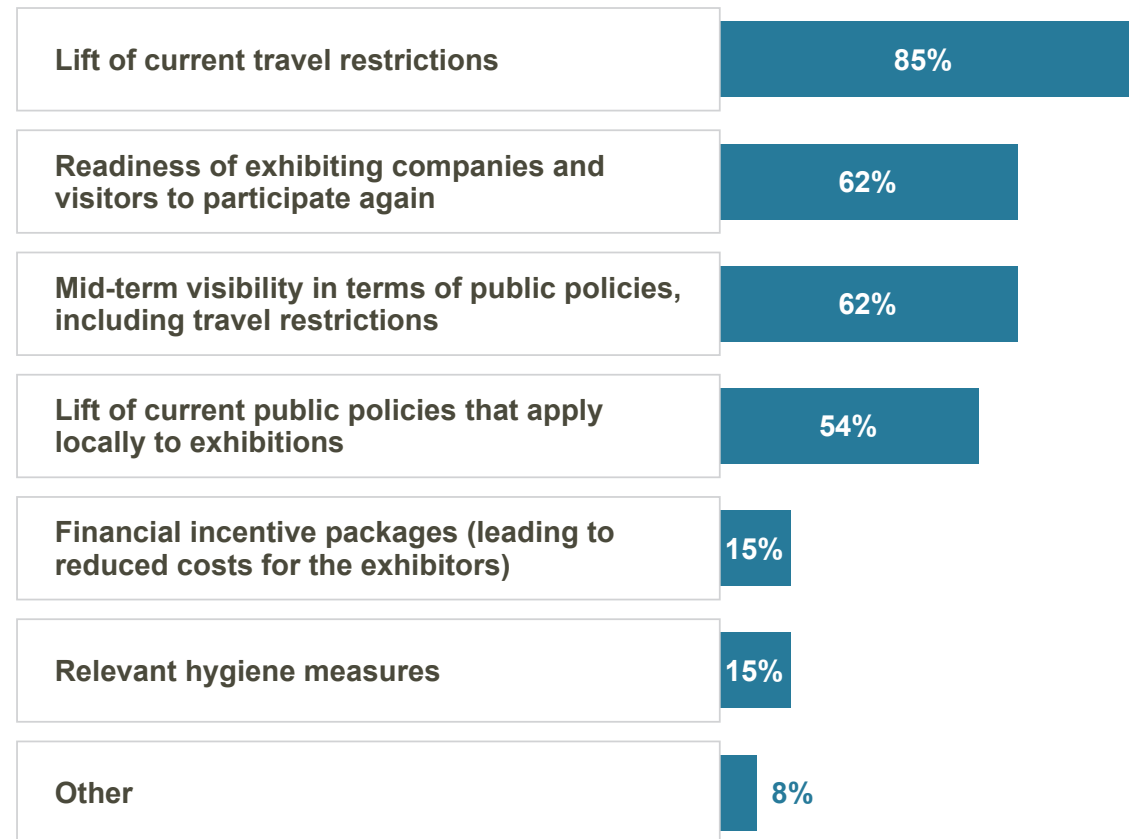




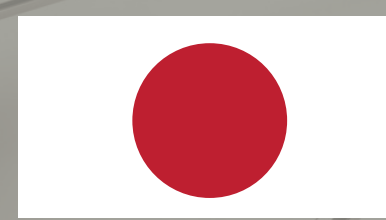
## When do you believe exhibitions will open again in your city?



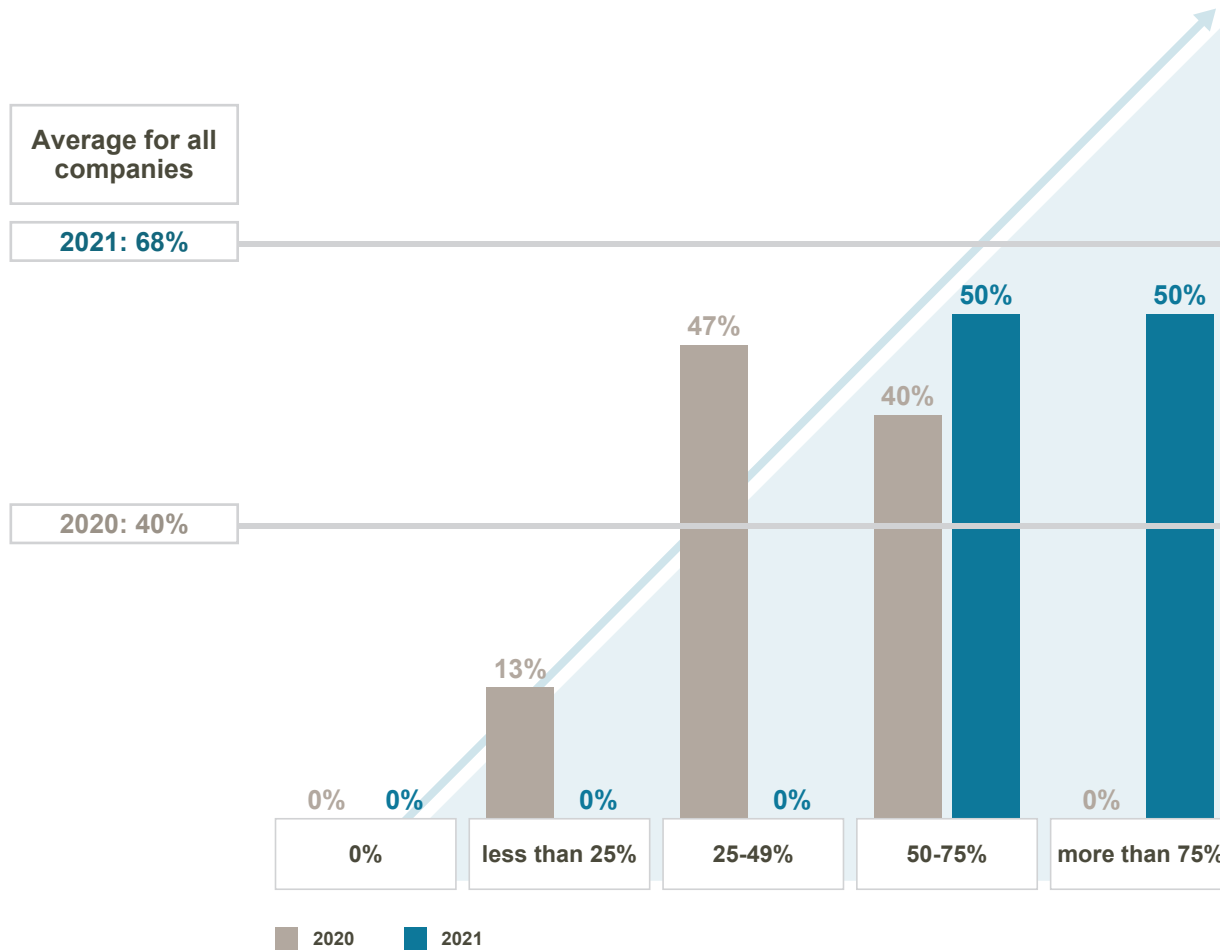
## What do you believe would most help the “bounce back” of exhibitions?



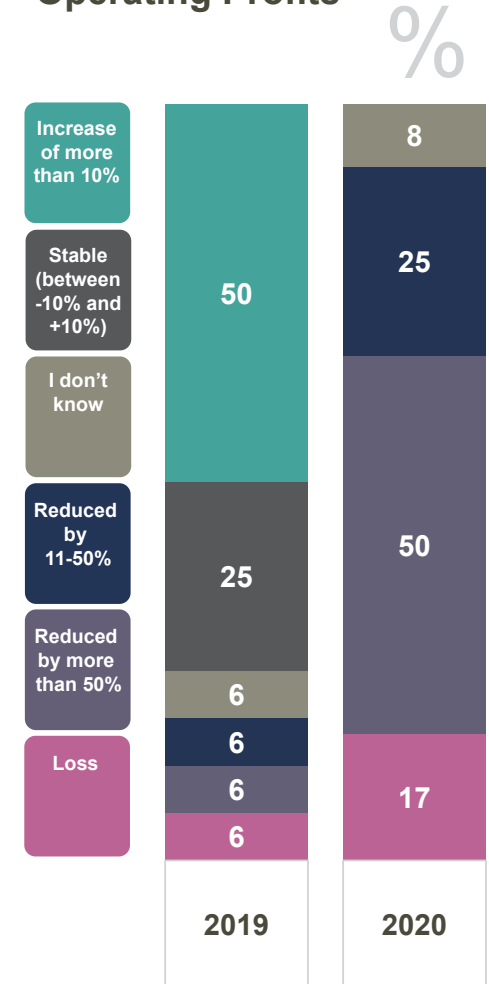
# Detailed results for Japan

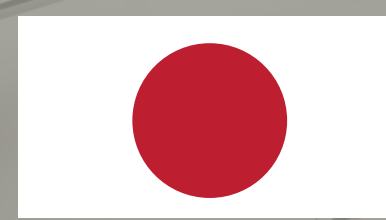


## Revenue compared to 2019

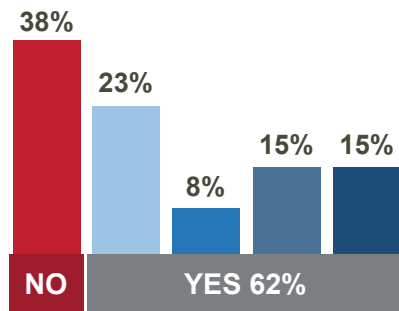


## Operating Profits

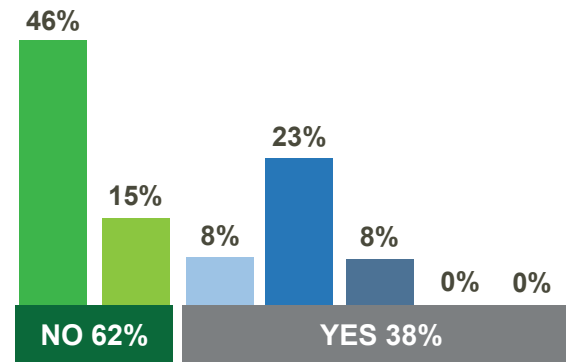




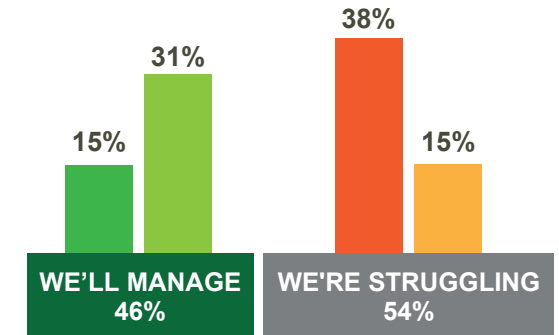
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



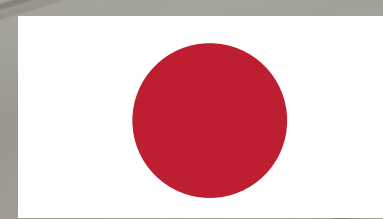
## If there is no business for the next 6 months, which best applies?



- 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

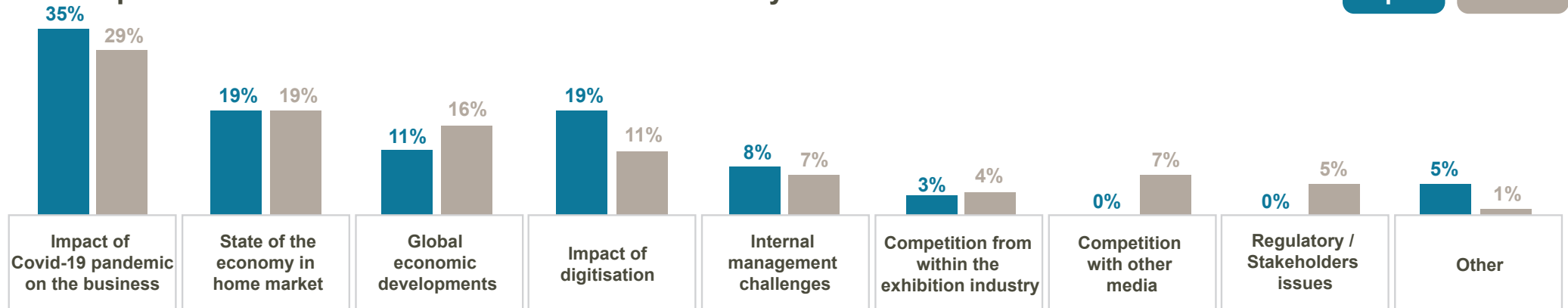
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

- 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



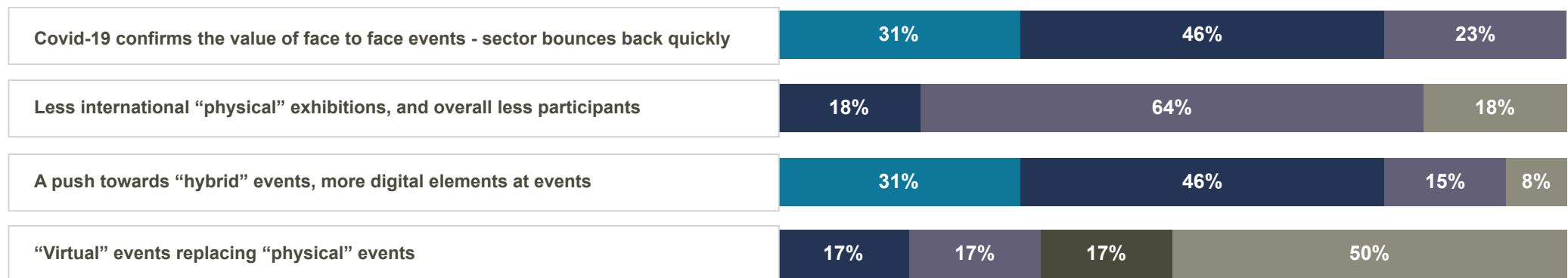
## Most important business issues in the exhibition industry

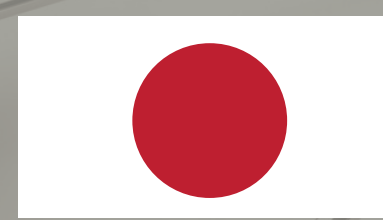
Japan Global



## Format of exhibitions in the coming years

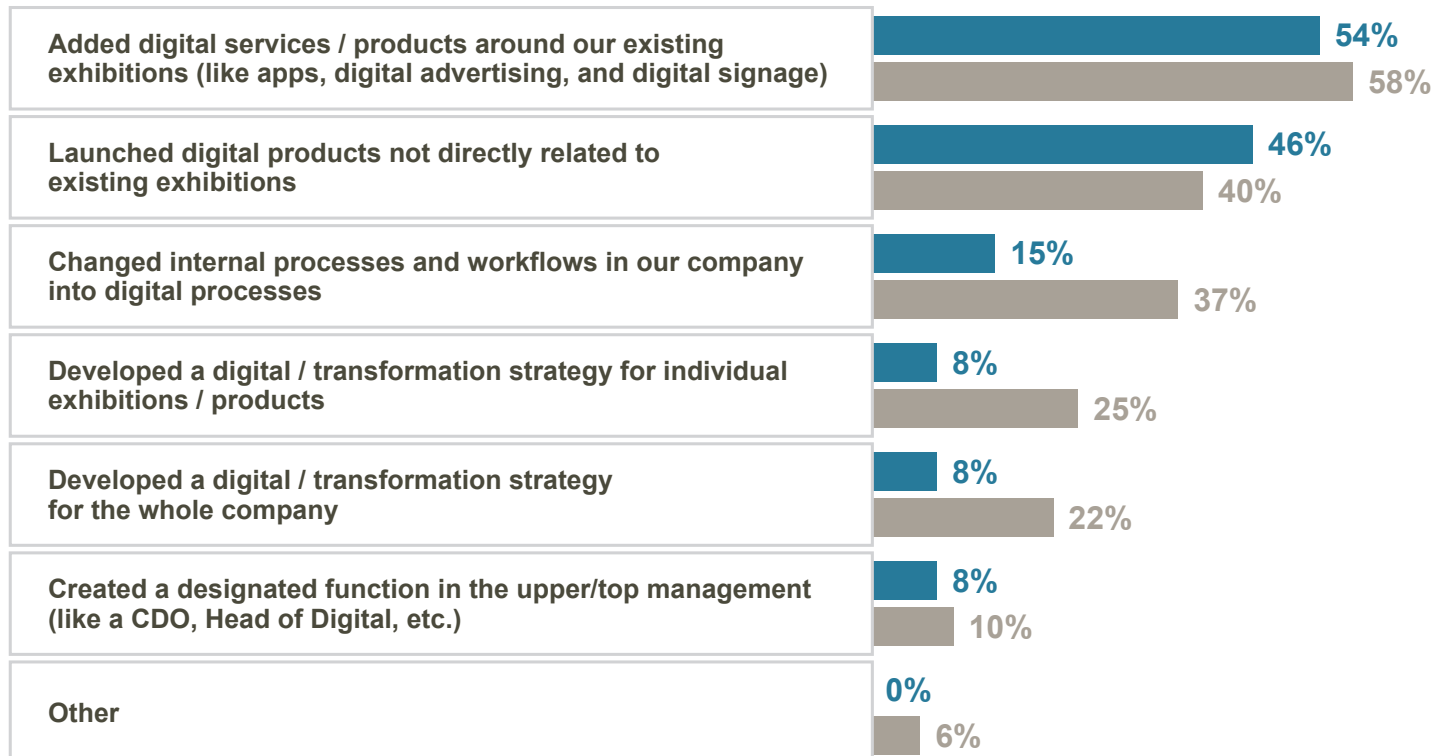
Yes, for sure Most probably Not sure Not sure at all Definitely not



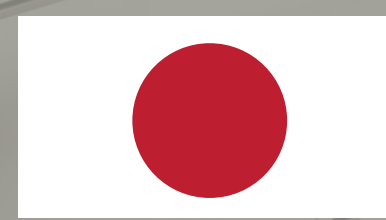


Japan Global

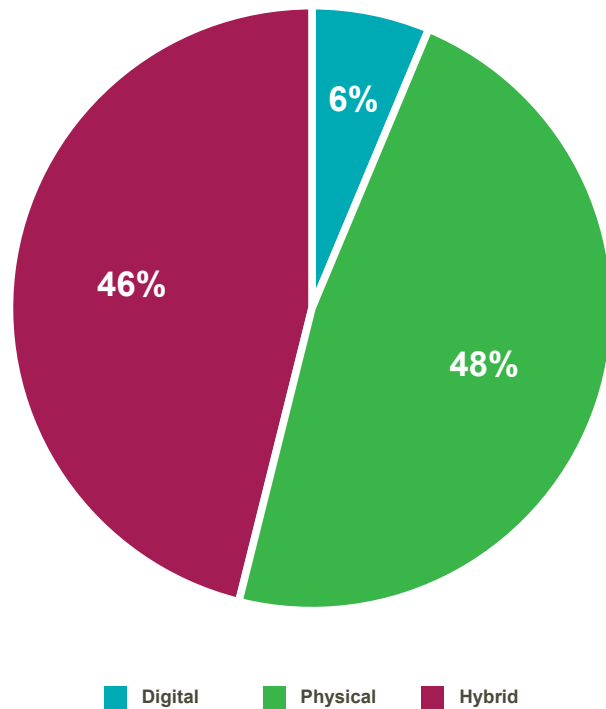
## Digitisation: implementation in Japan and globally



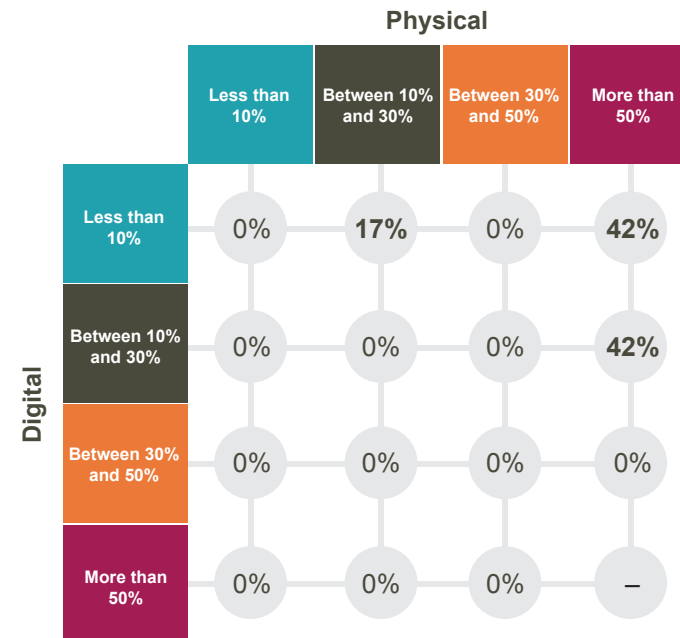


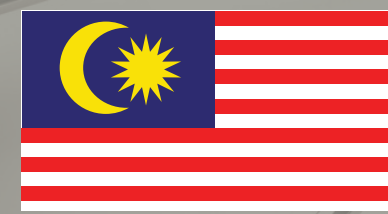


Number of fairs projected in 2021

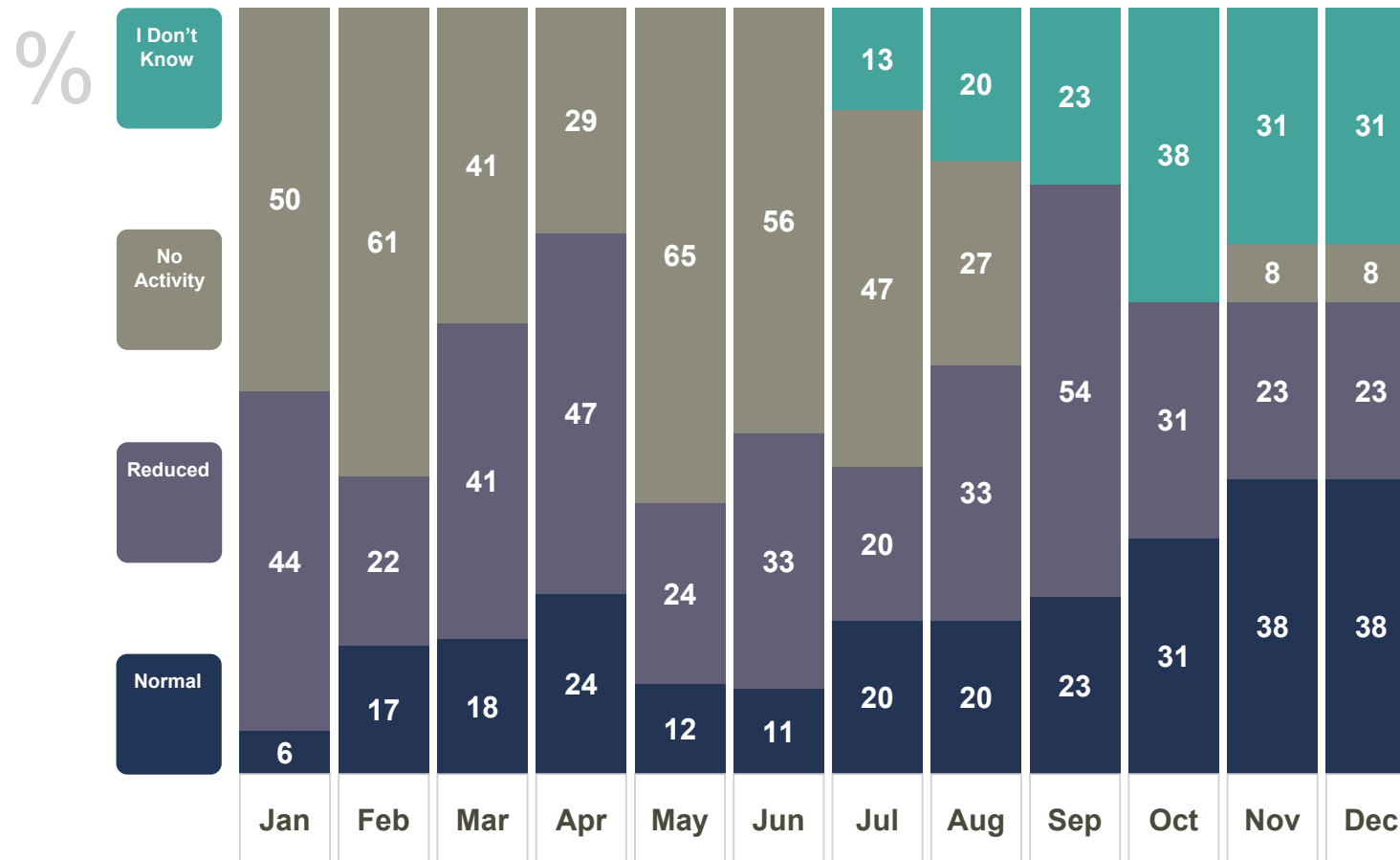


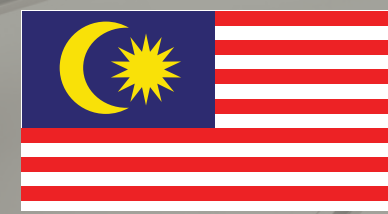
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



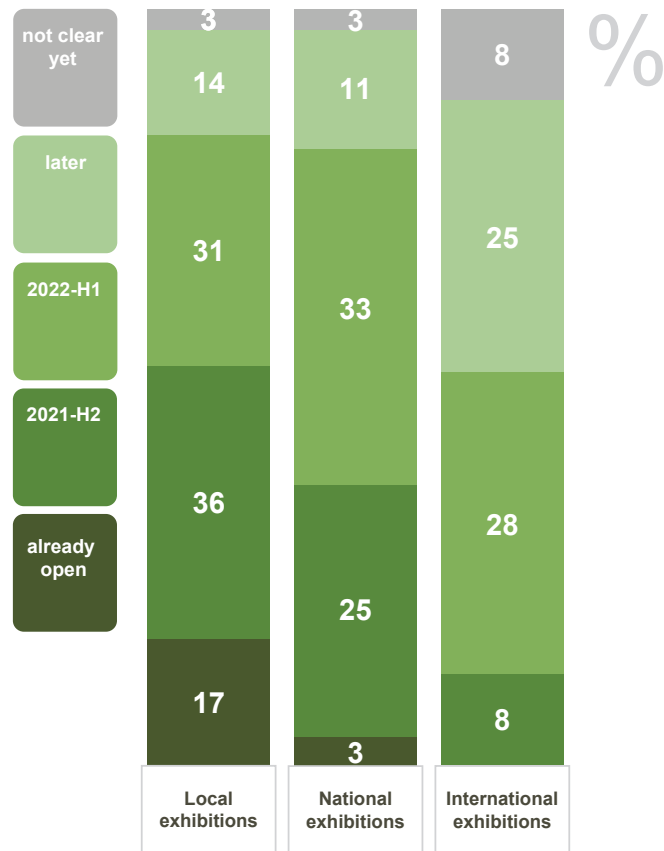


## Situation of industry operations in 2021

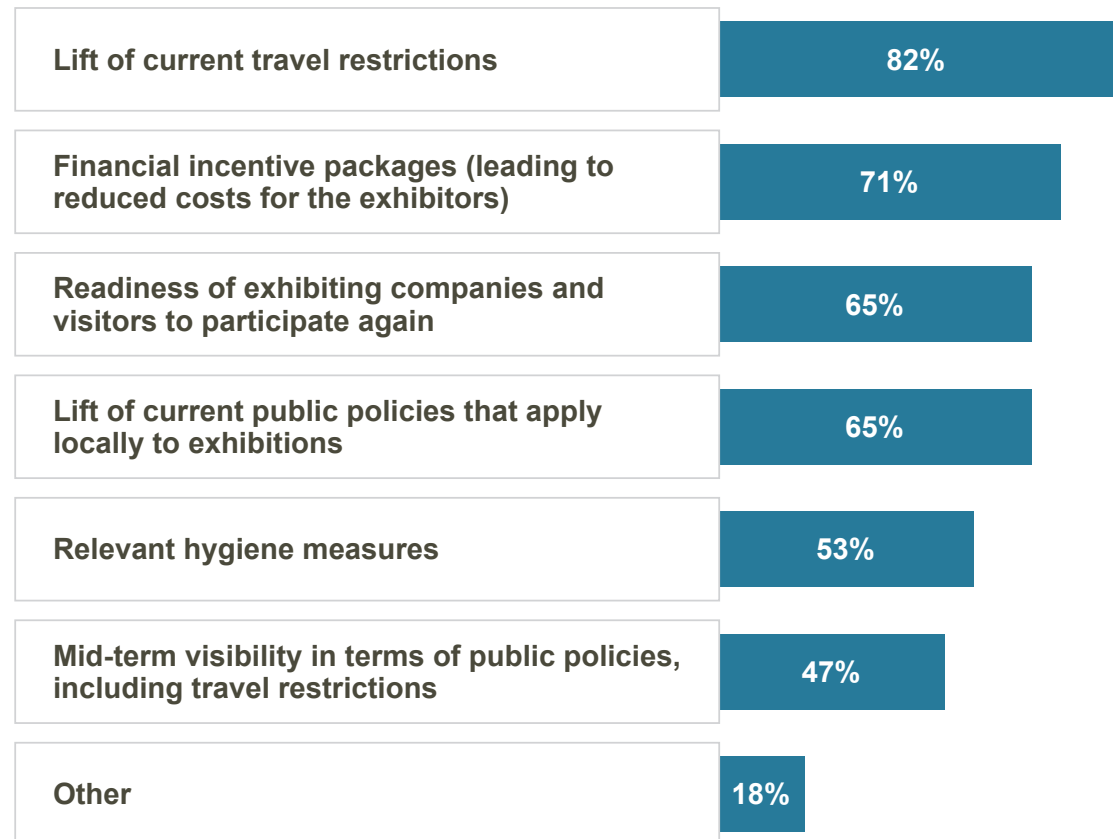


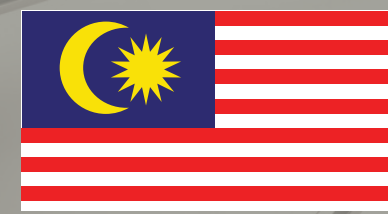


## When do you believe exhibitions will open again in your city?

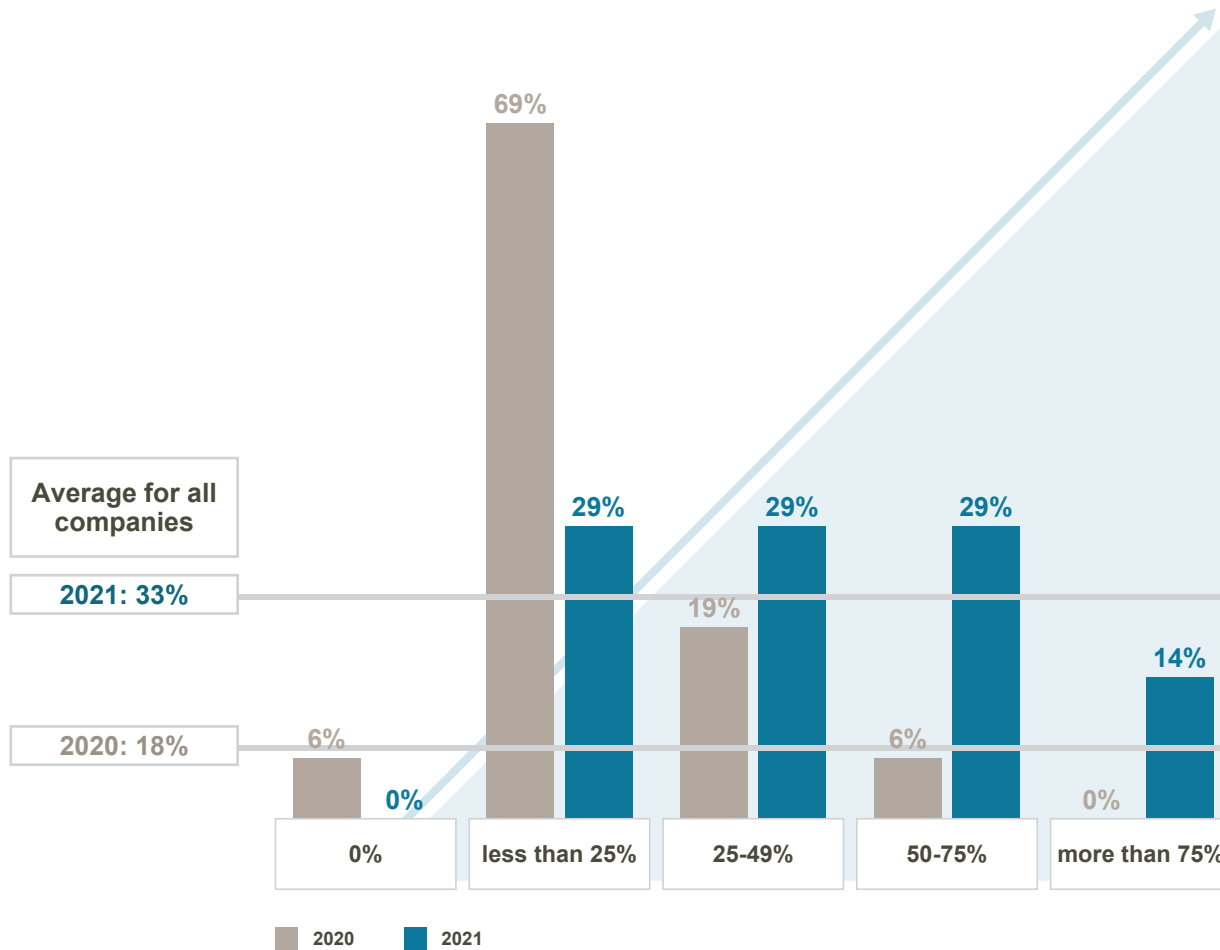


## What do you believe would most help the “bounce back” of exhibitions?

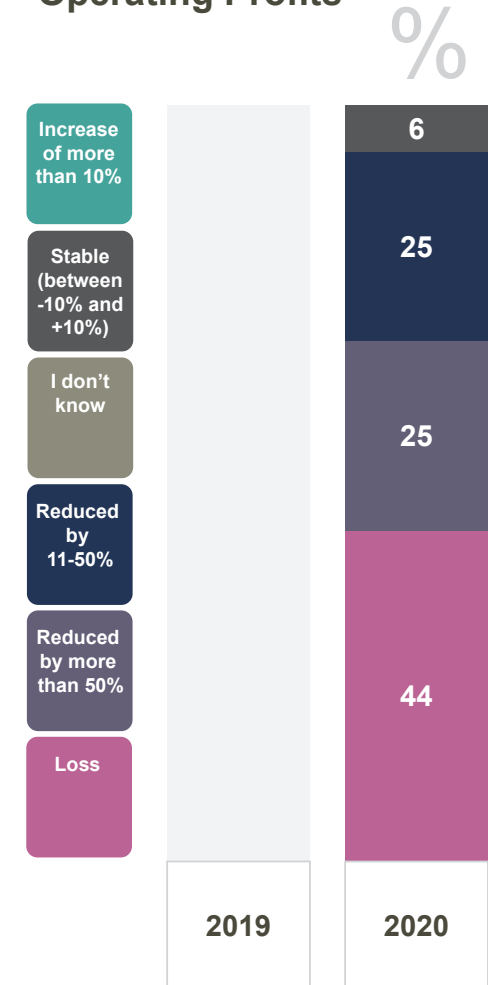




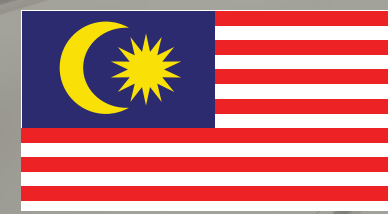
## Revenue compared to 2019



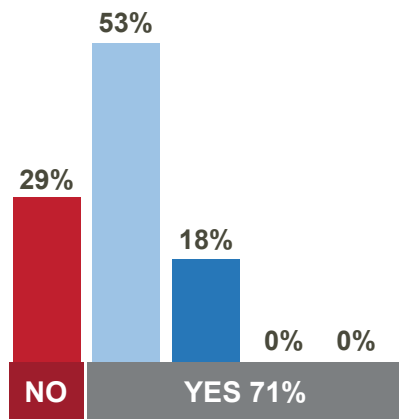
## Operating Profits



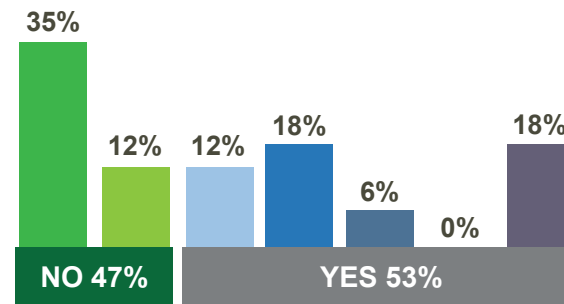
# Detailed results for Malaysia



## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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

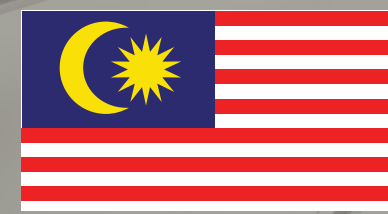


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

- 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

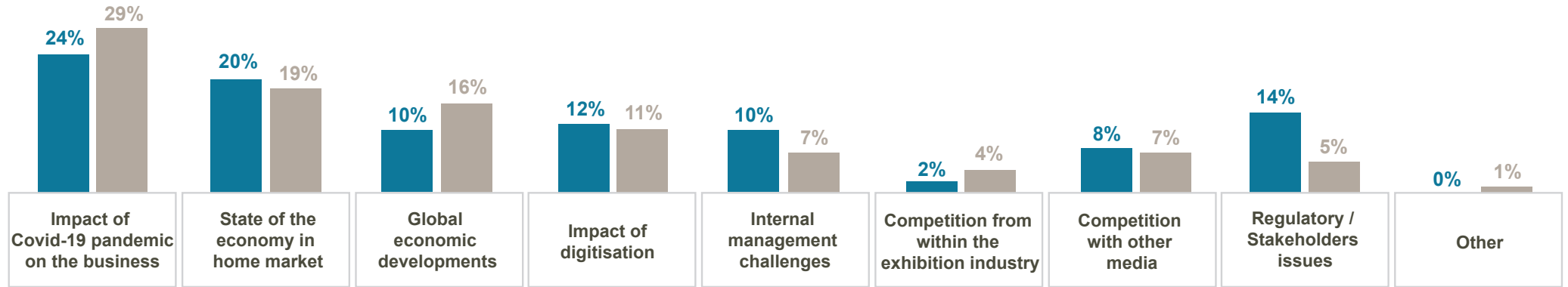
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for Malaysia



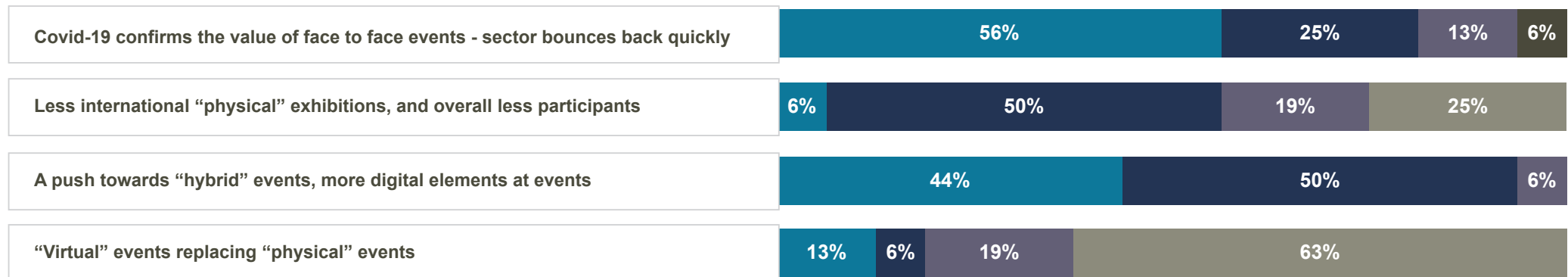
## Most important business issues in the exhibition industry

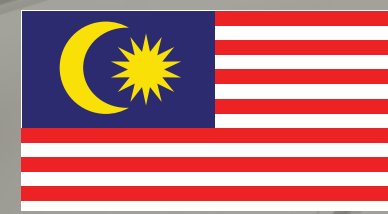
Malaysia Global



## Format of exhibitions in the coming years

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

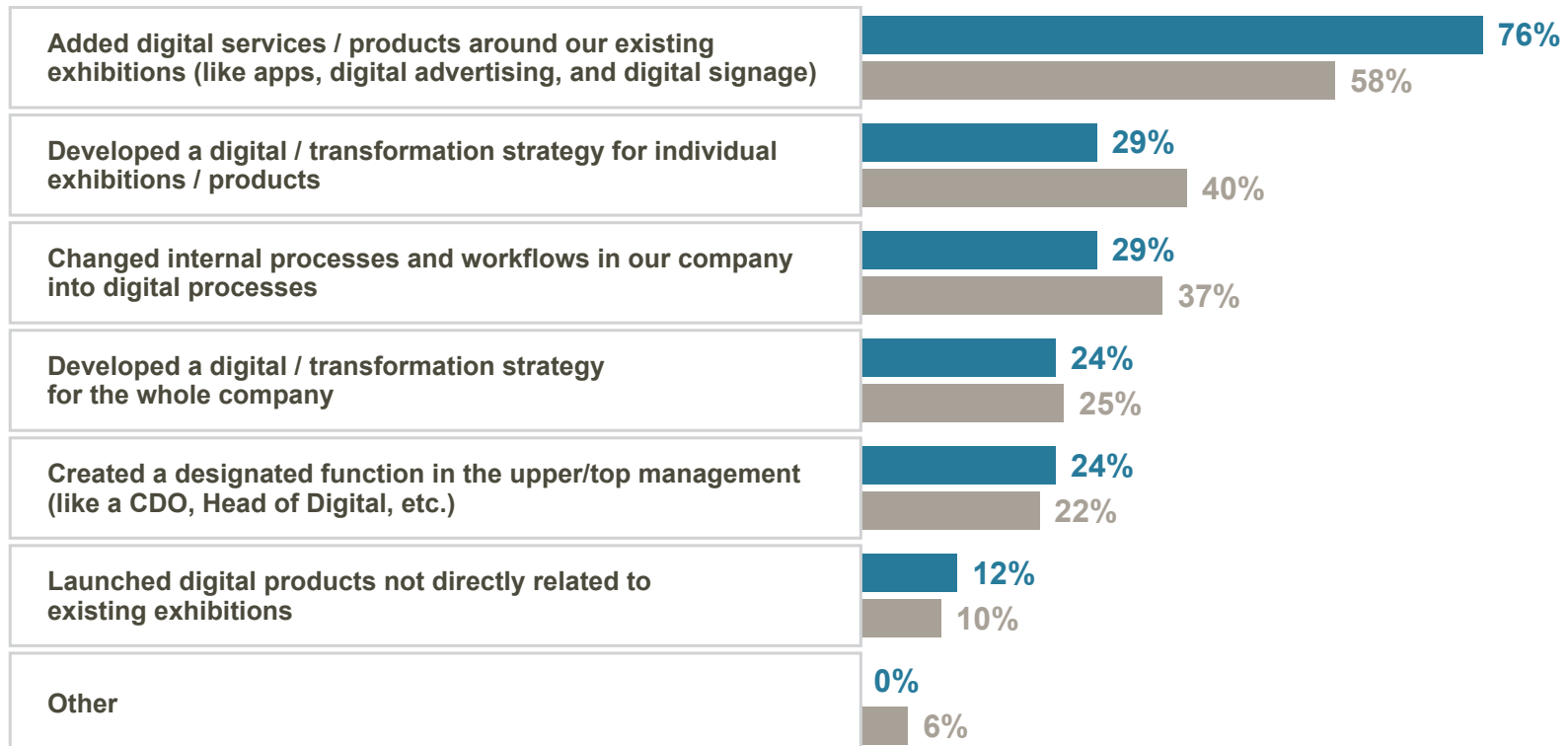


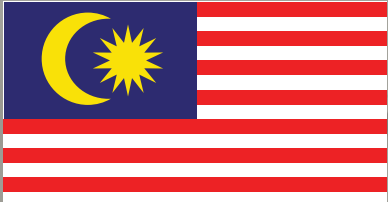


Malaysia

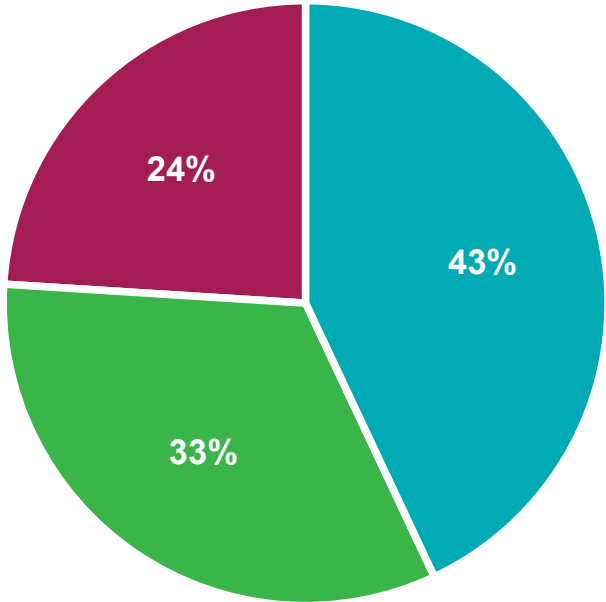
Global

## Digitisation: implementation in Malaysia and globally



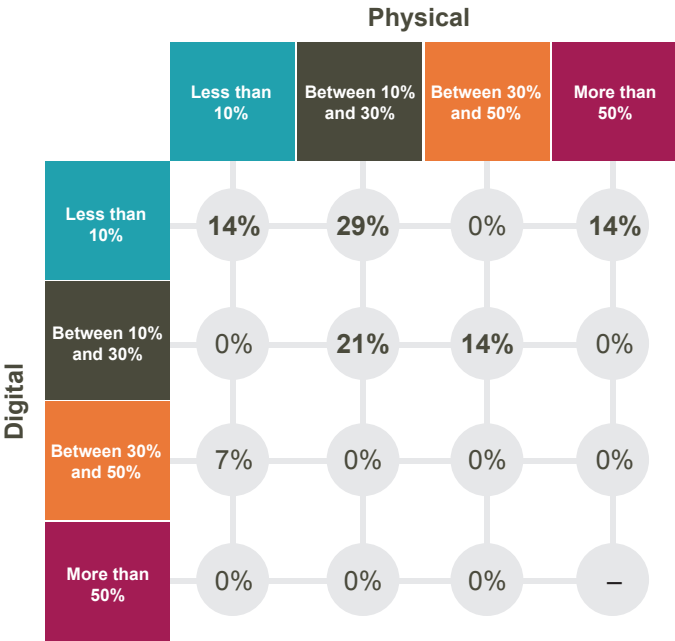


Number of fairs projected in 2021



■ Digital   
 ■ Physical   
 ■ Hybrid

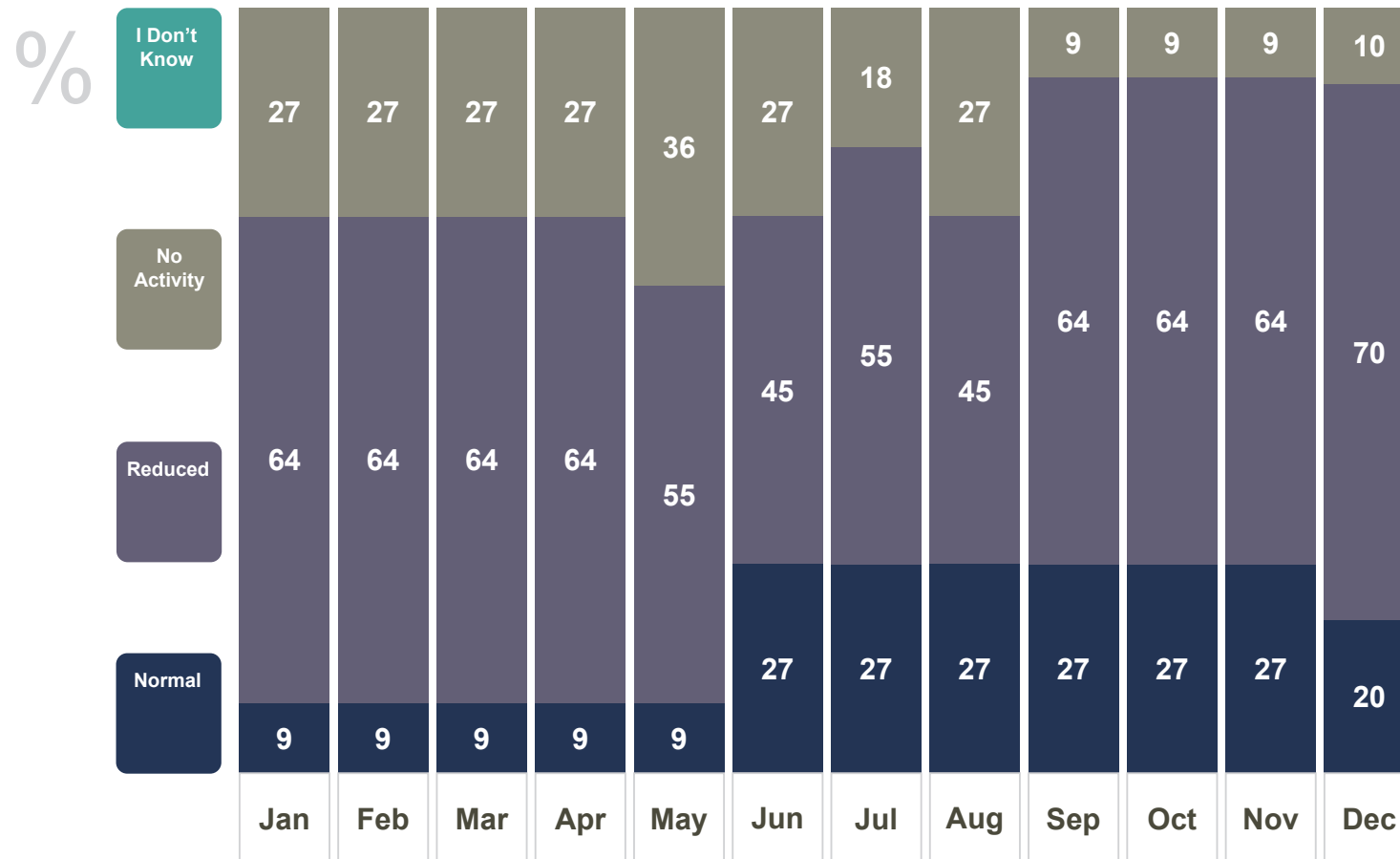
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years





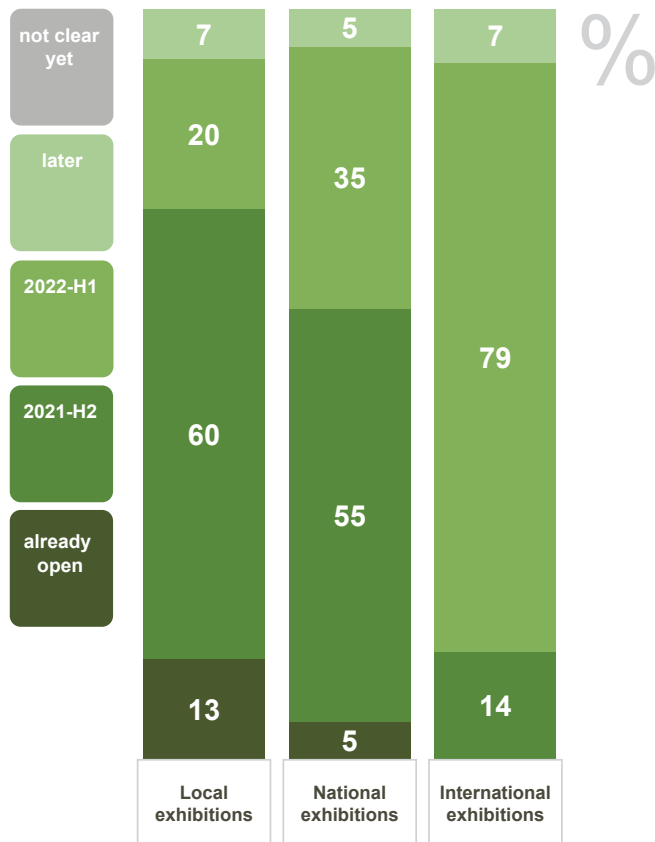


## Situation of industry operations in 2021

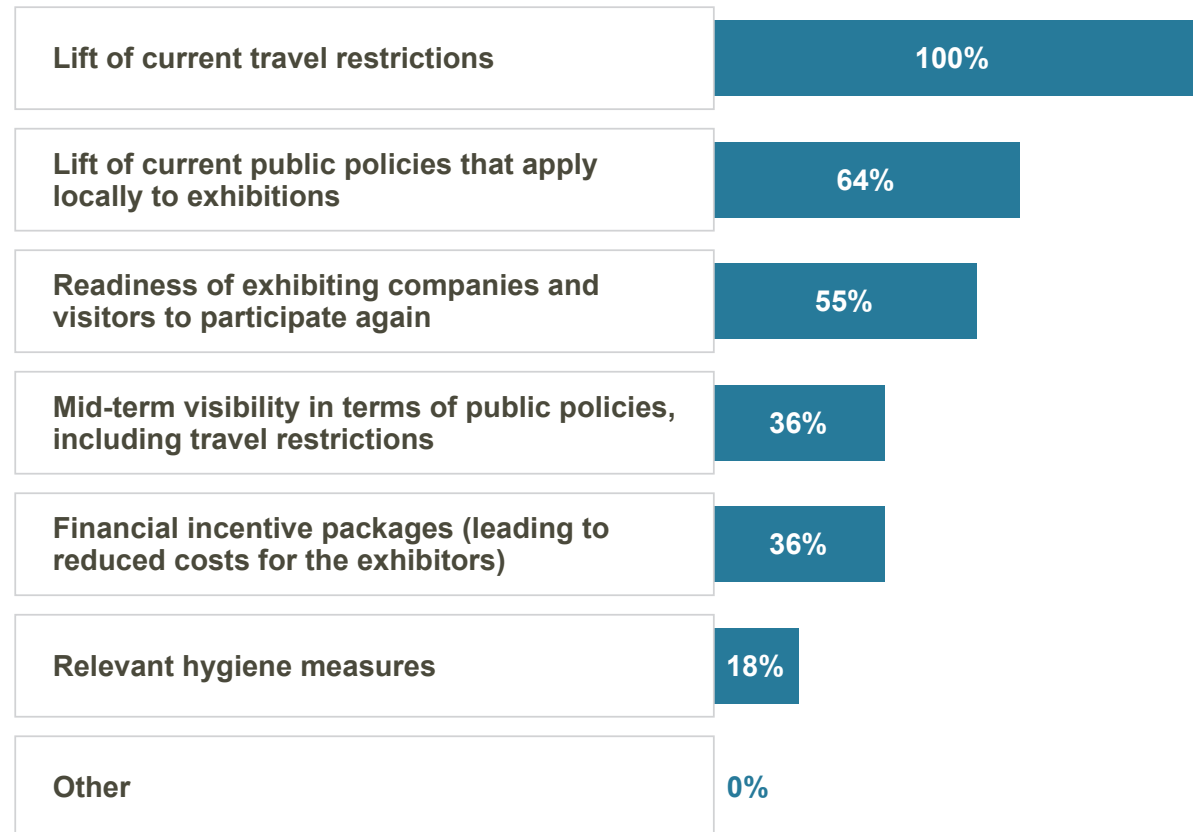




## When do you believe exhibitions will open again in your city?

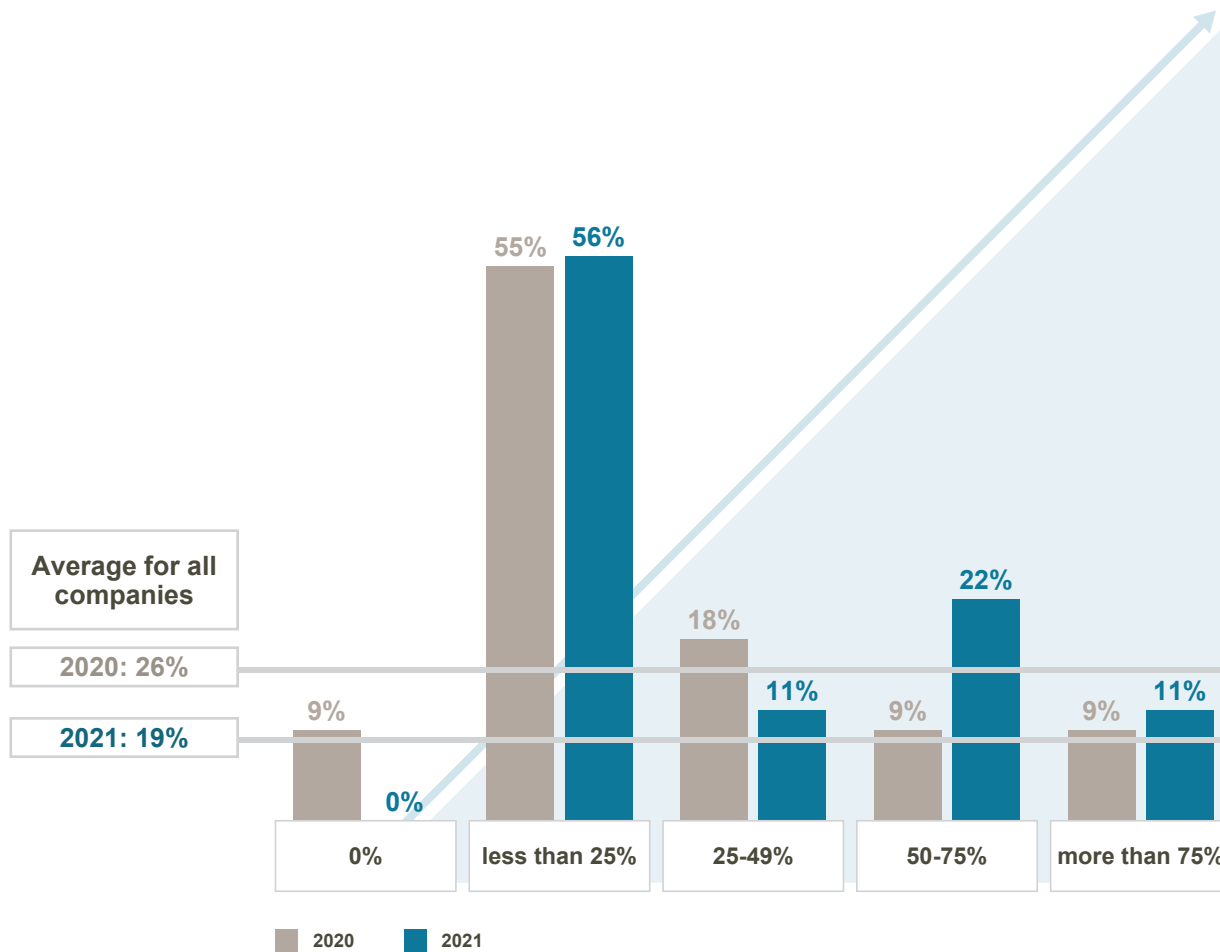


## What do you believe would most help the “bounce back” of exhibitions?

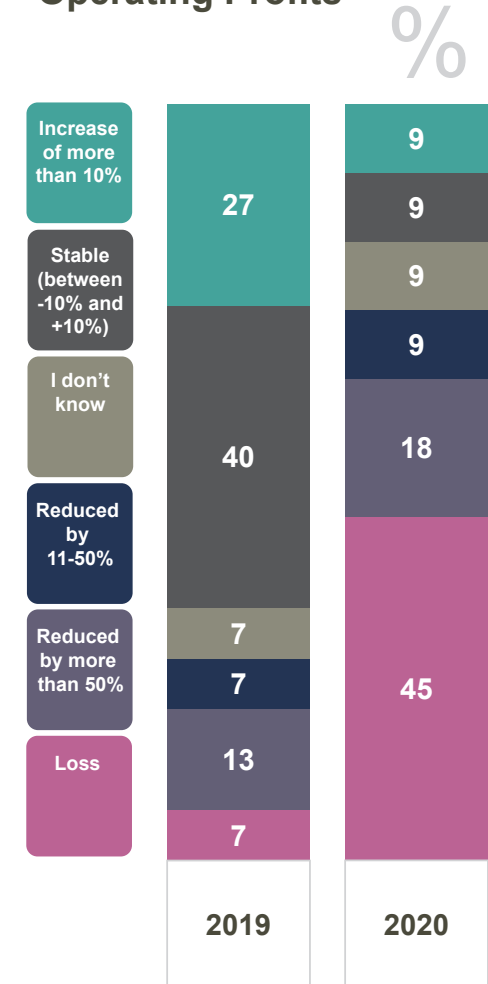




## Revenue compared to 2019



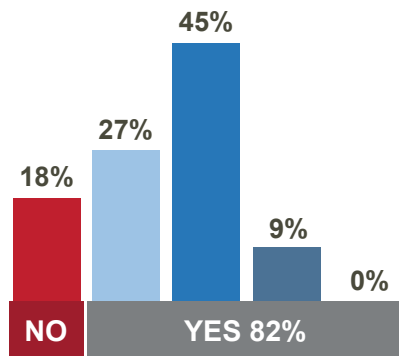
## Operating Profits



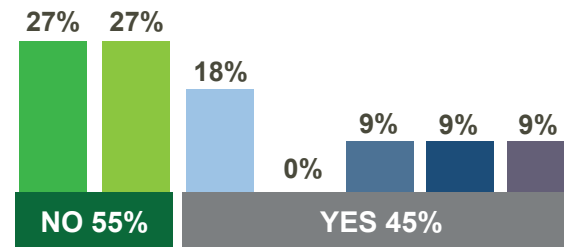
# Detailed results for Singapore



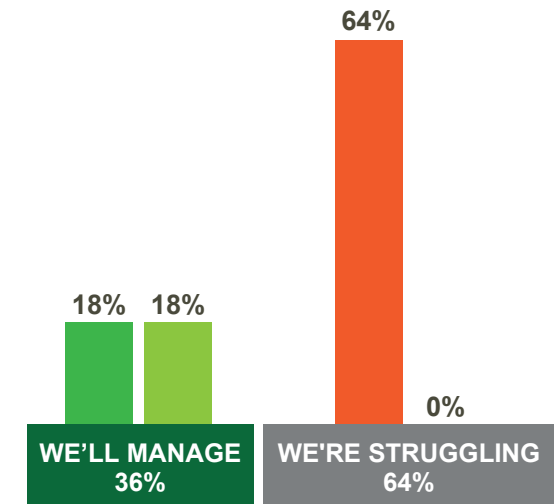
## Did your company benefit from public financial support?



## 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

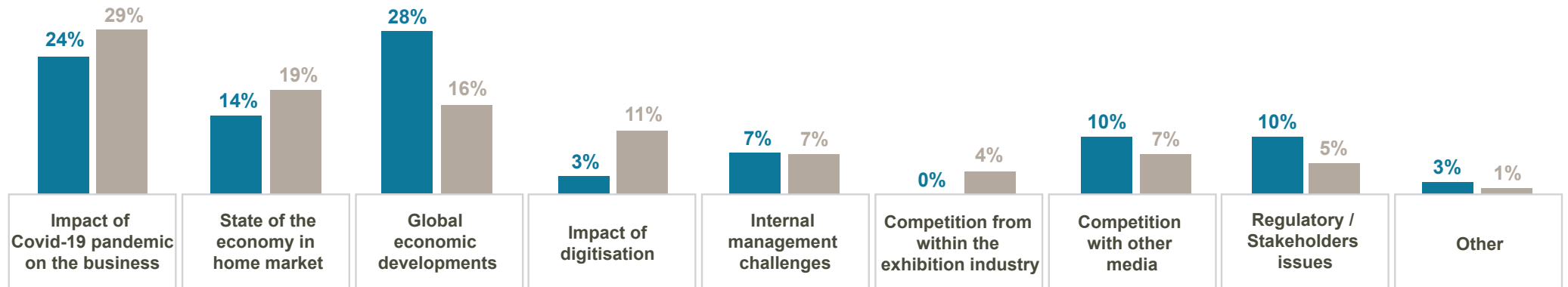
# Detailed results for Singapore



## Most important business issues in the exhibition industry

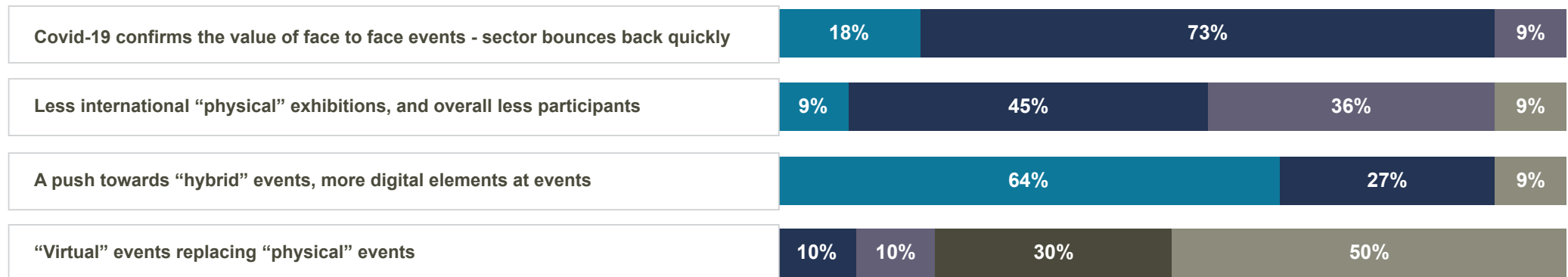
Singapore

Global



## Format of exhibitions in the coming years

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

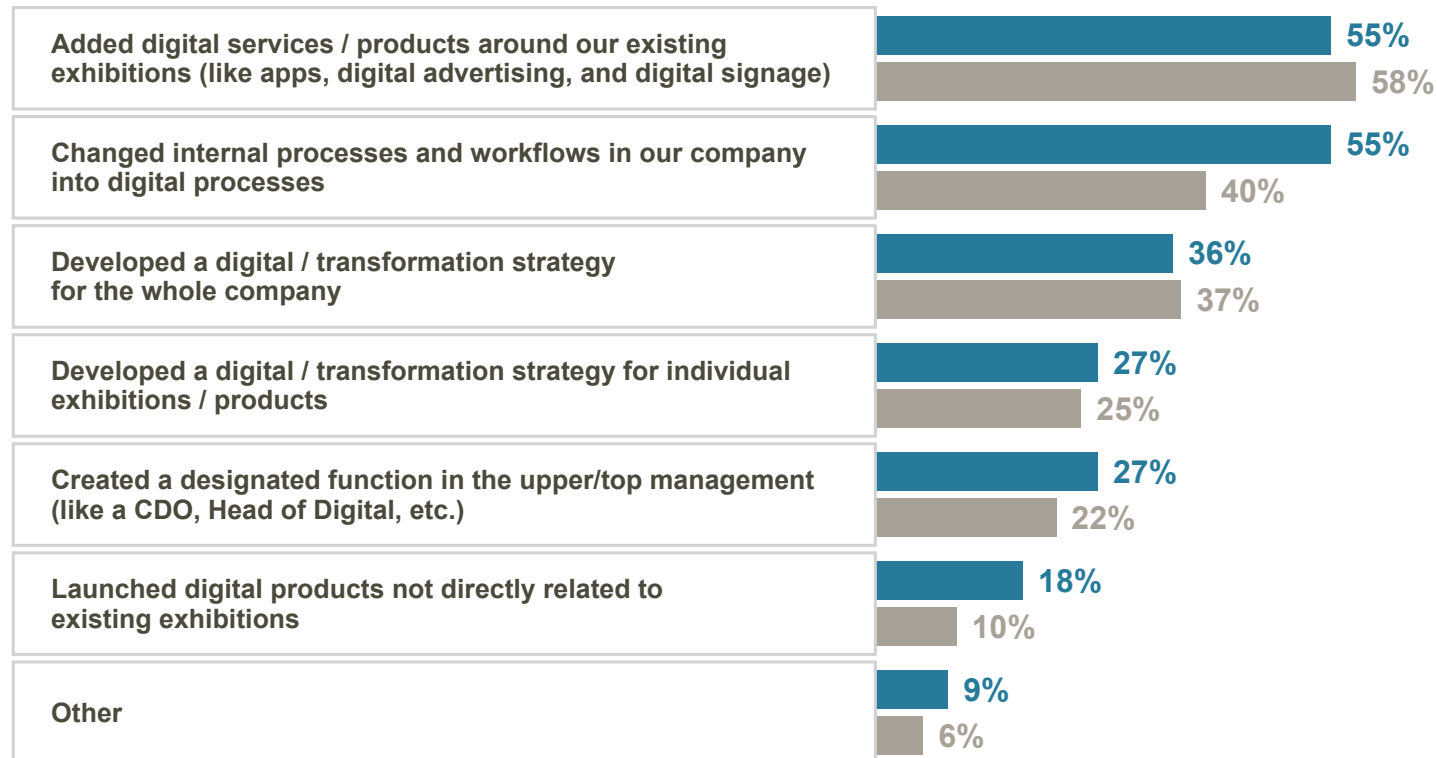




Singapore

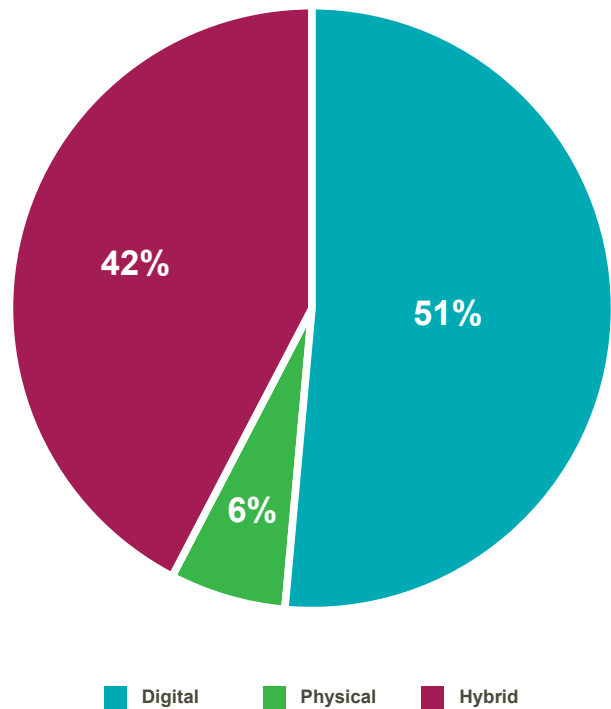
Global

## Digitisation: implementation in Singapore and globally

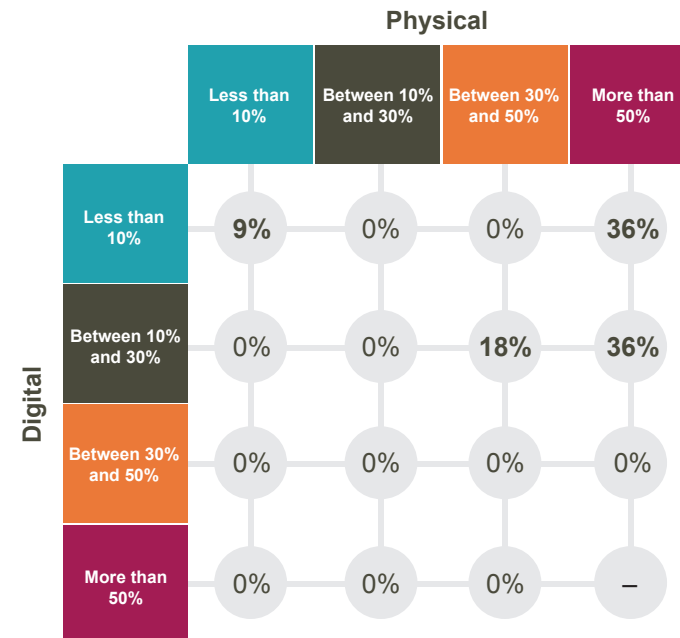




Number of fairs projected in 2021

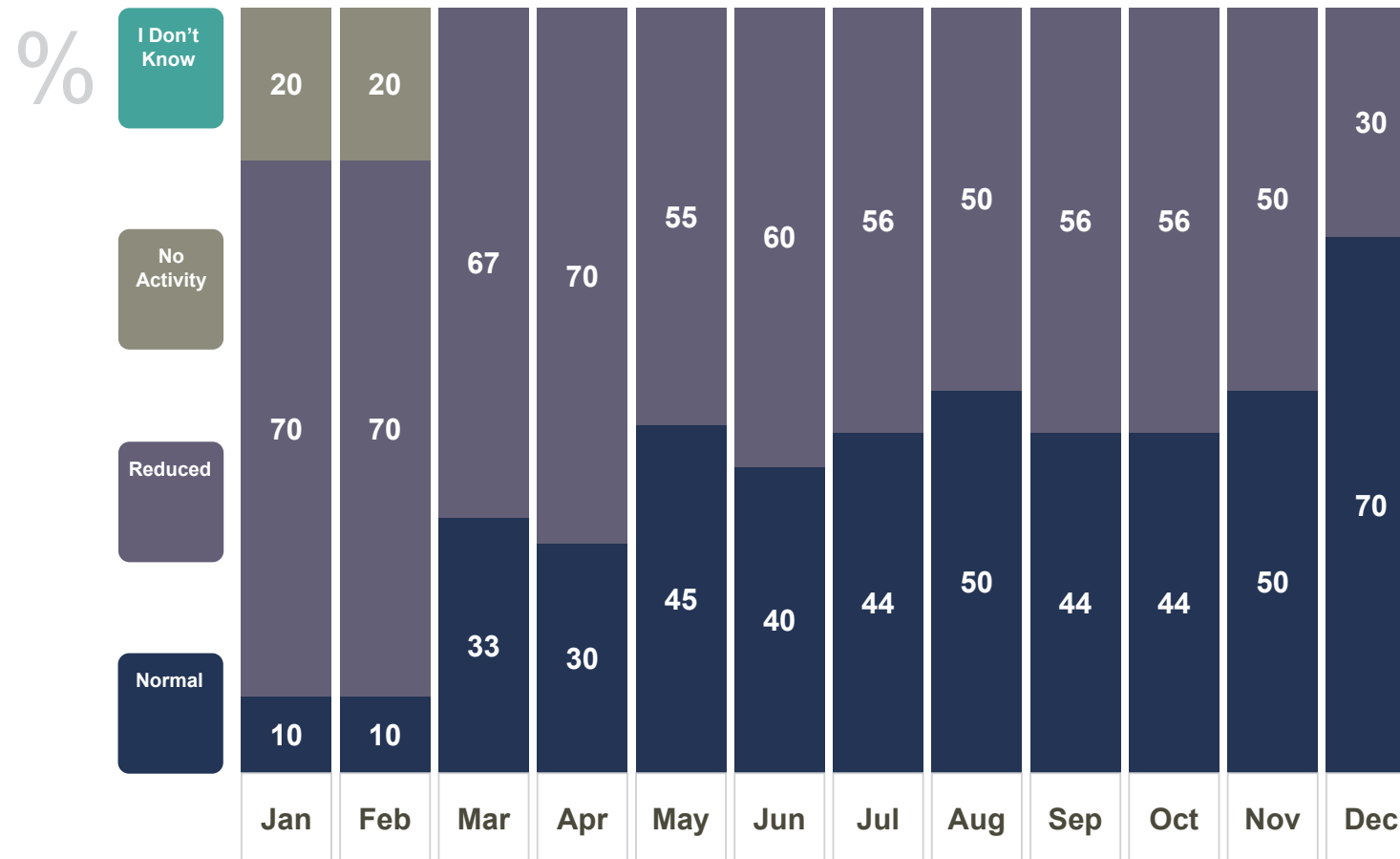


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years





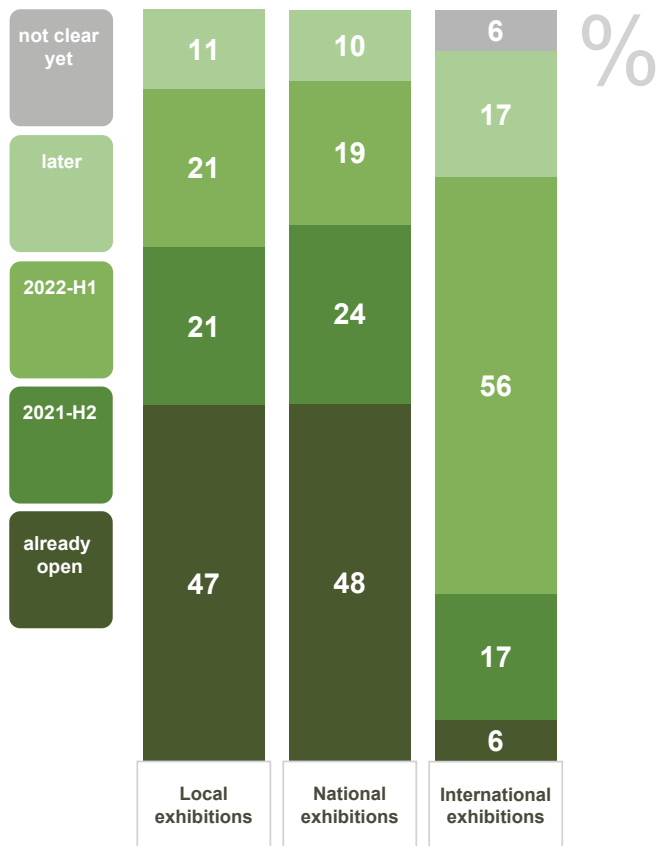
## Situation of industry operations in 2021



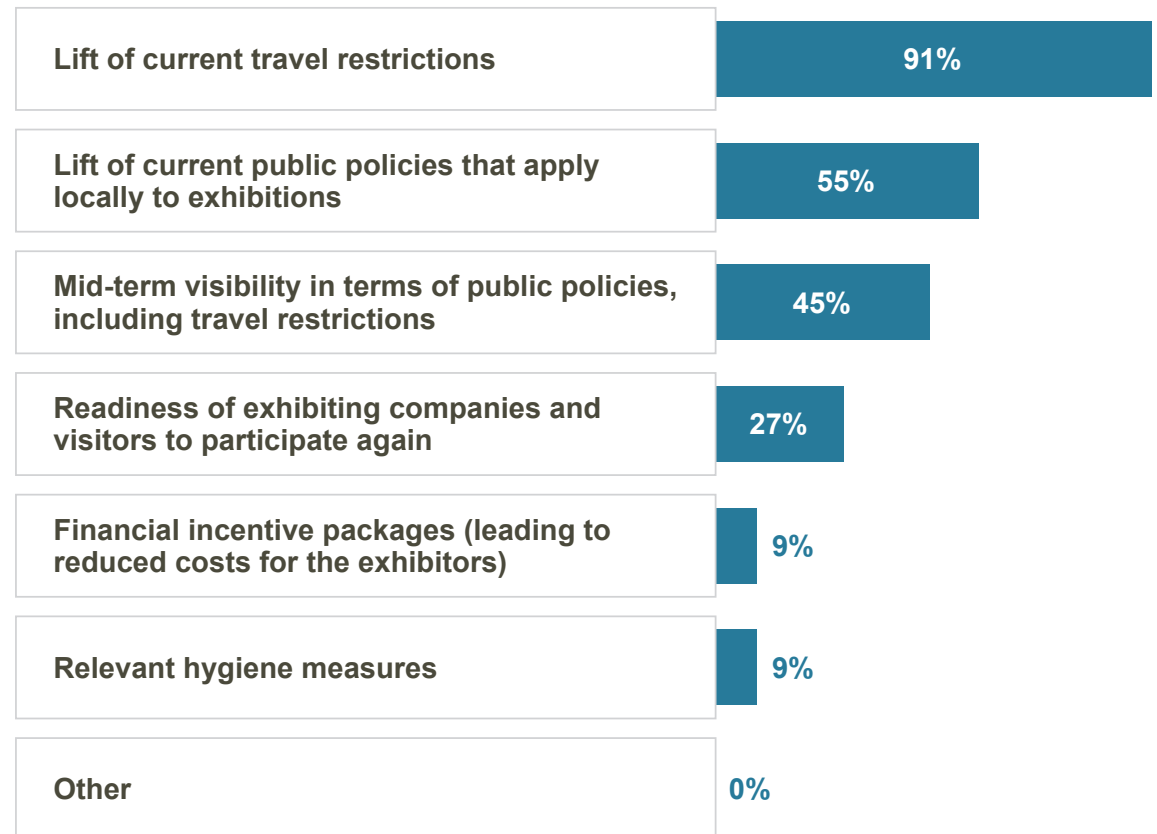




## When do you believe exhibitions will open again in your city?



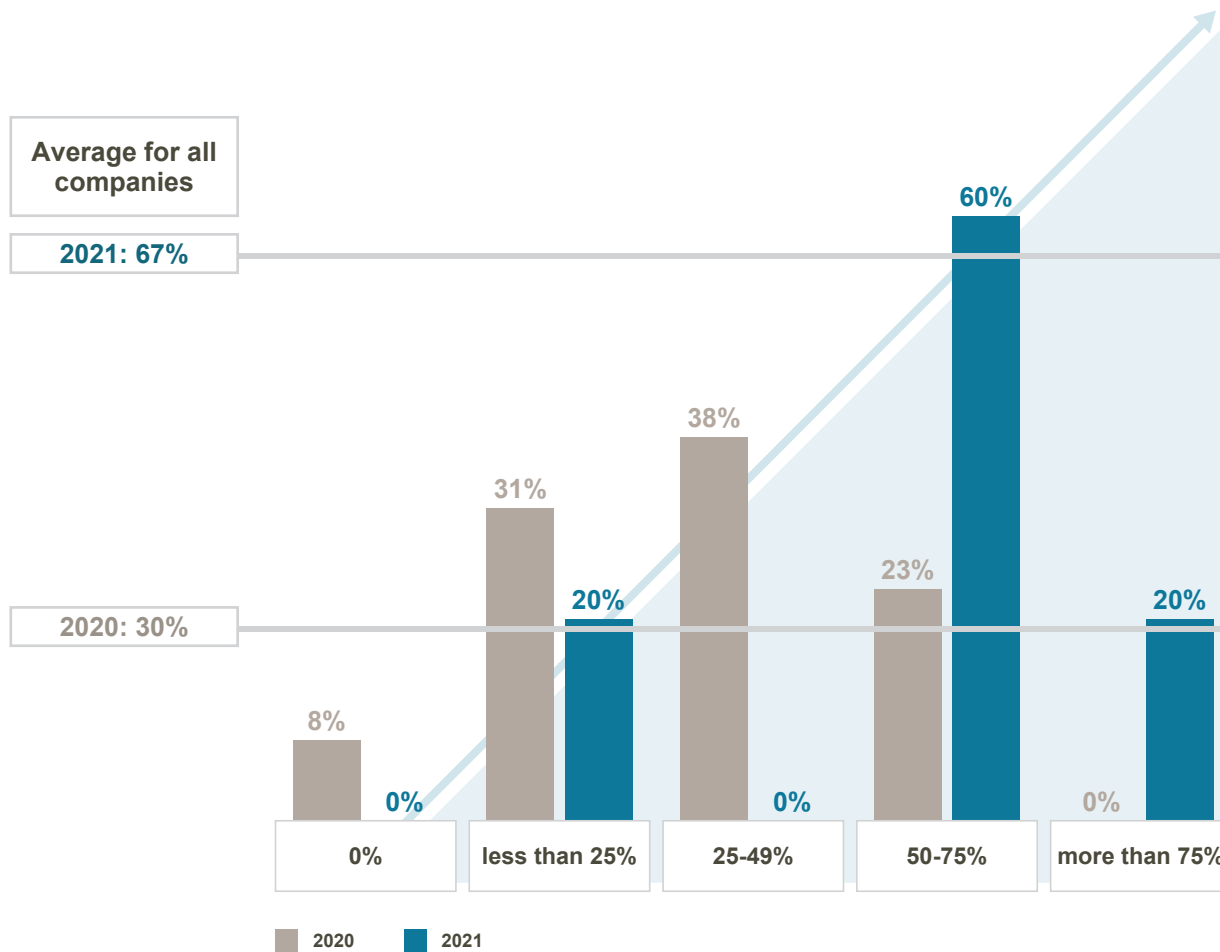
## What do you believe would most help the “bounce back” of exhibitions?



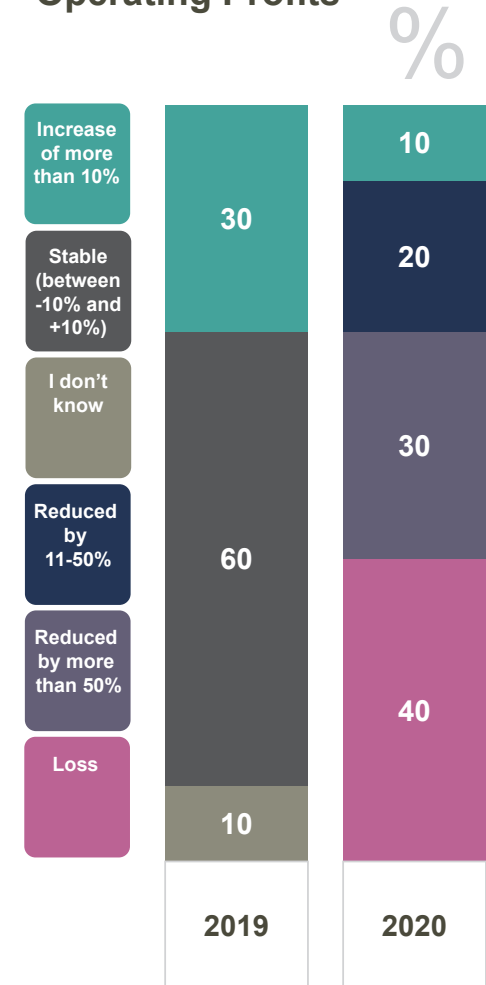
# Detailed results for South Korea



## Revenue compared to 2019



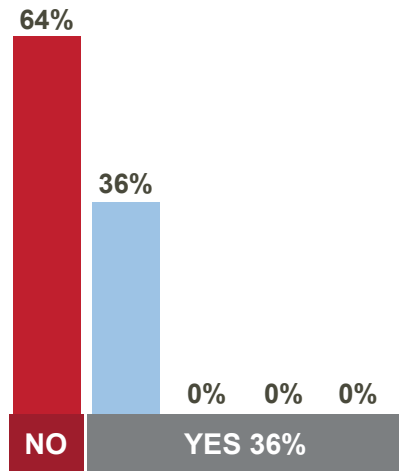
## Operating Profits



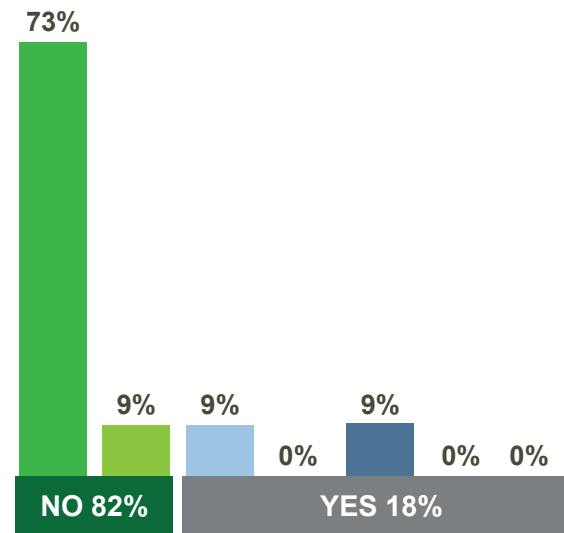
# Detailed results for South Korea



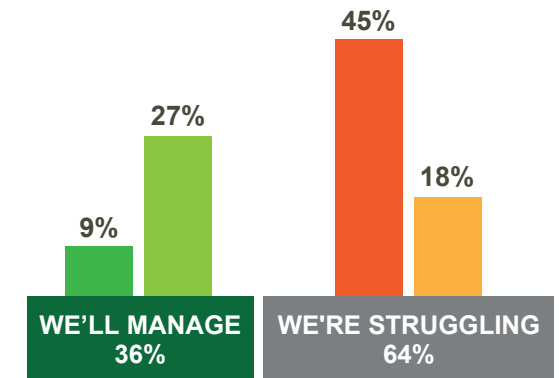
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

- 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

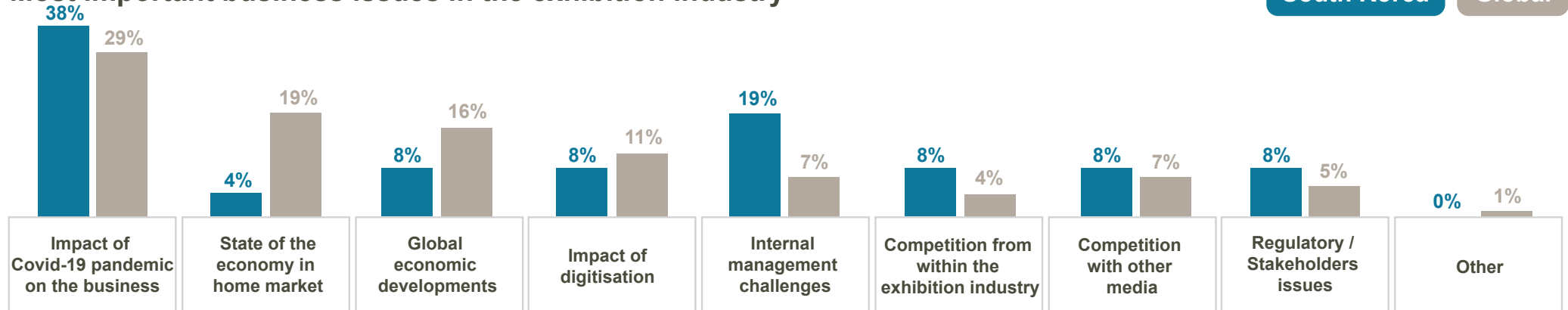
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

# Detailed results for South Korea



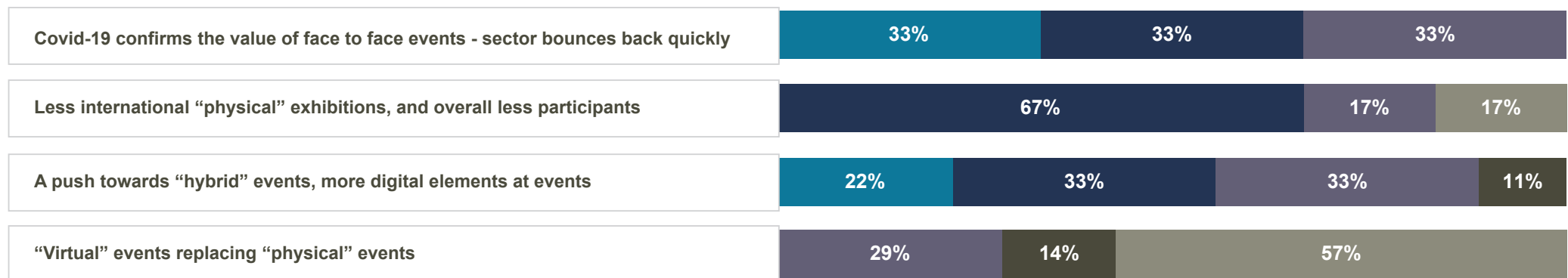
## Most important business issues in the exhibition industry

South Korea Global



## Format of exhibitions in the coming years

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

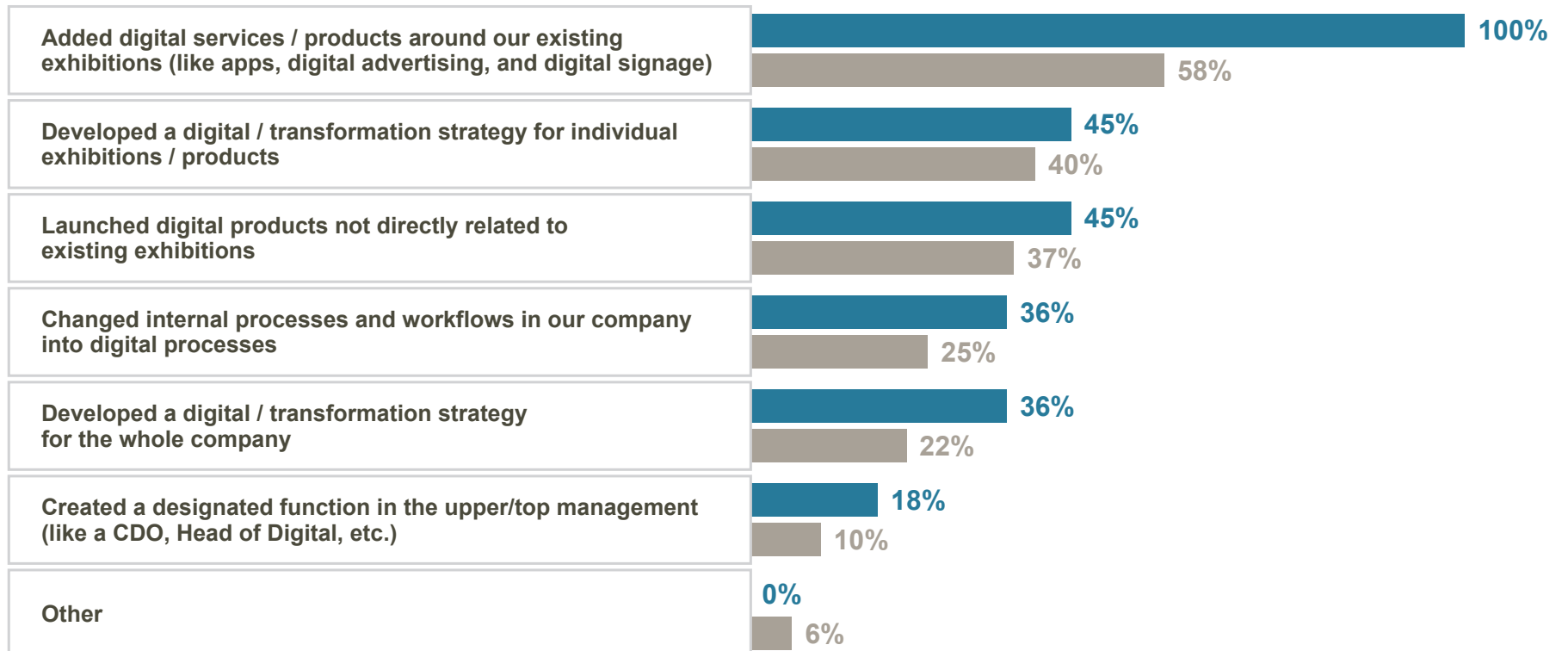




South Korea

Global

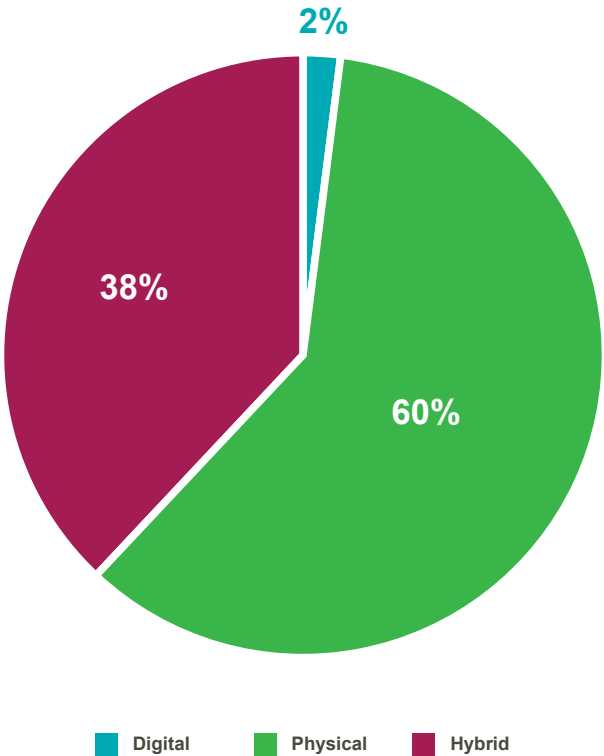
## Digitisation: implementation in South Korea and globally



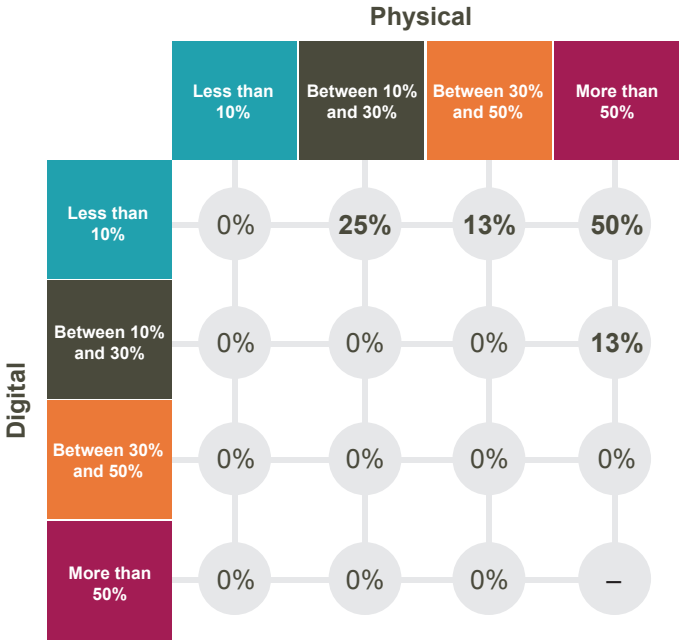
# Detailed results for South Korea



Number of fairs projected in 2021

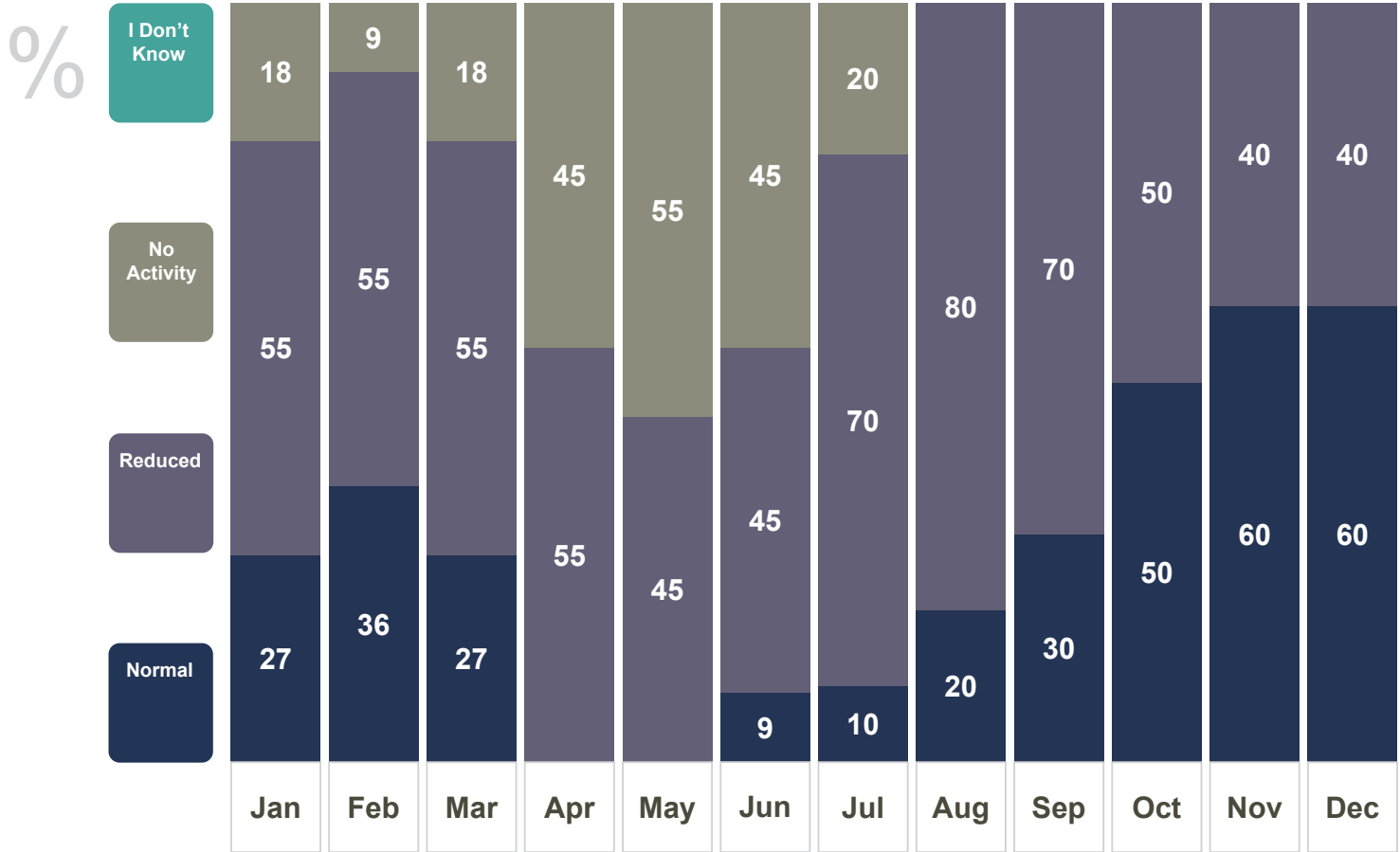


Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years



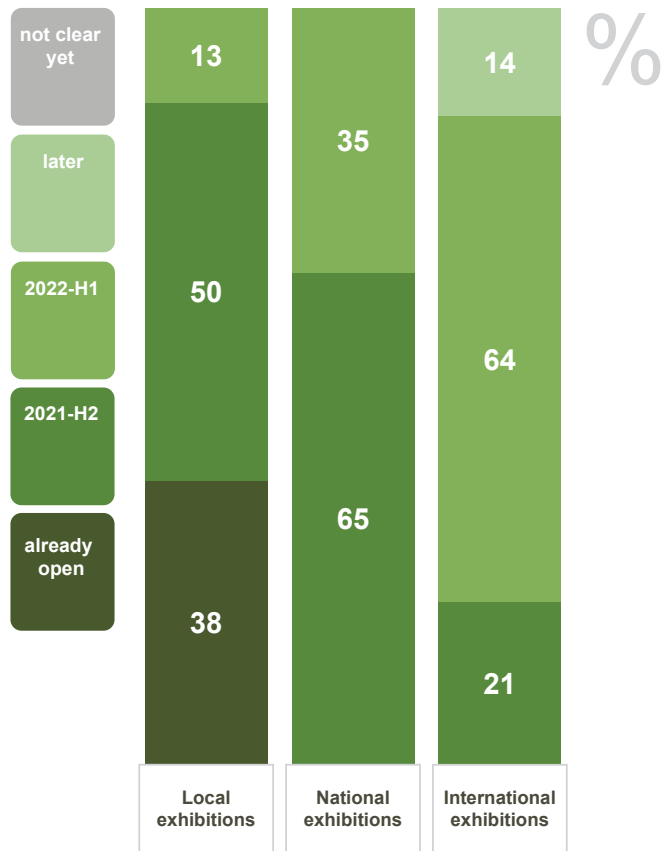


## Situation of industry operations in 2021

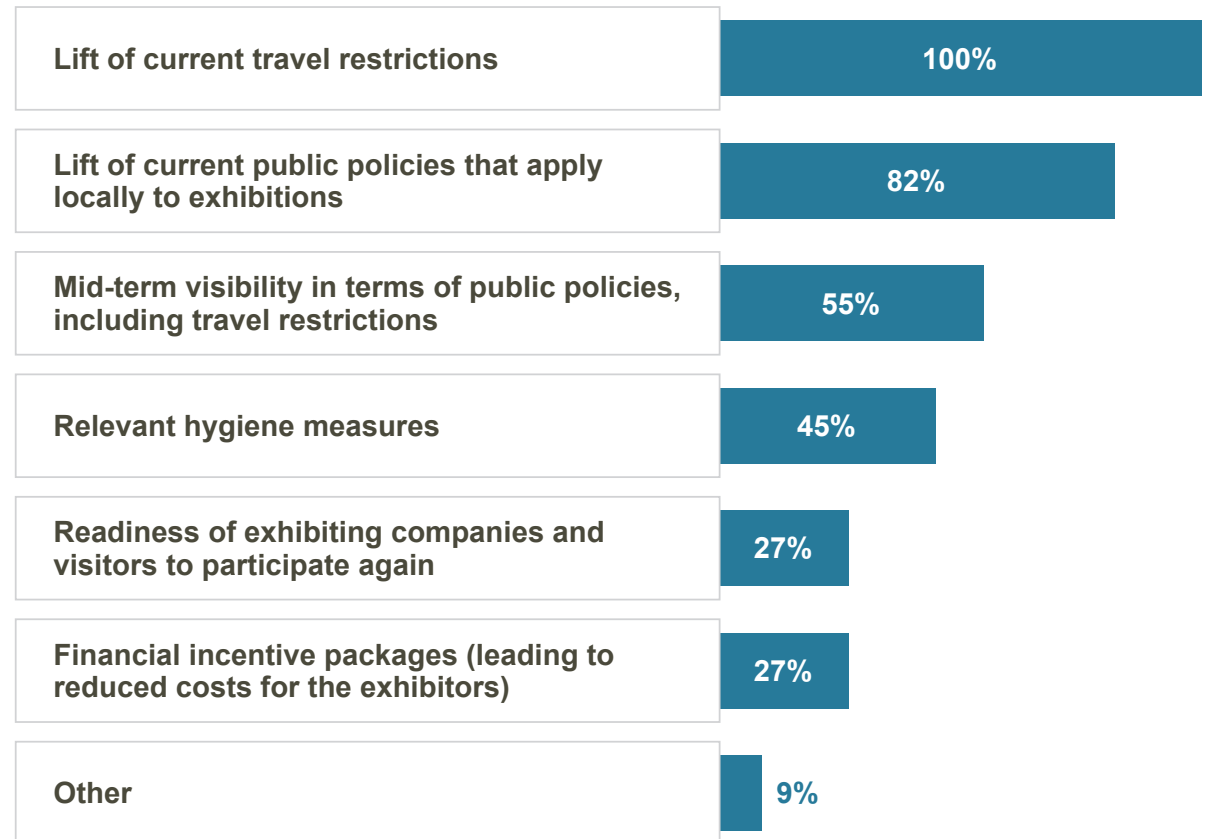




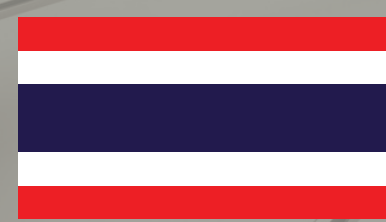
## When do you believe exhibitions will open again in your city?



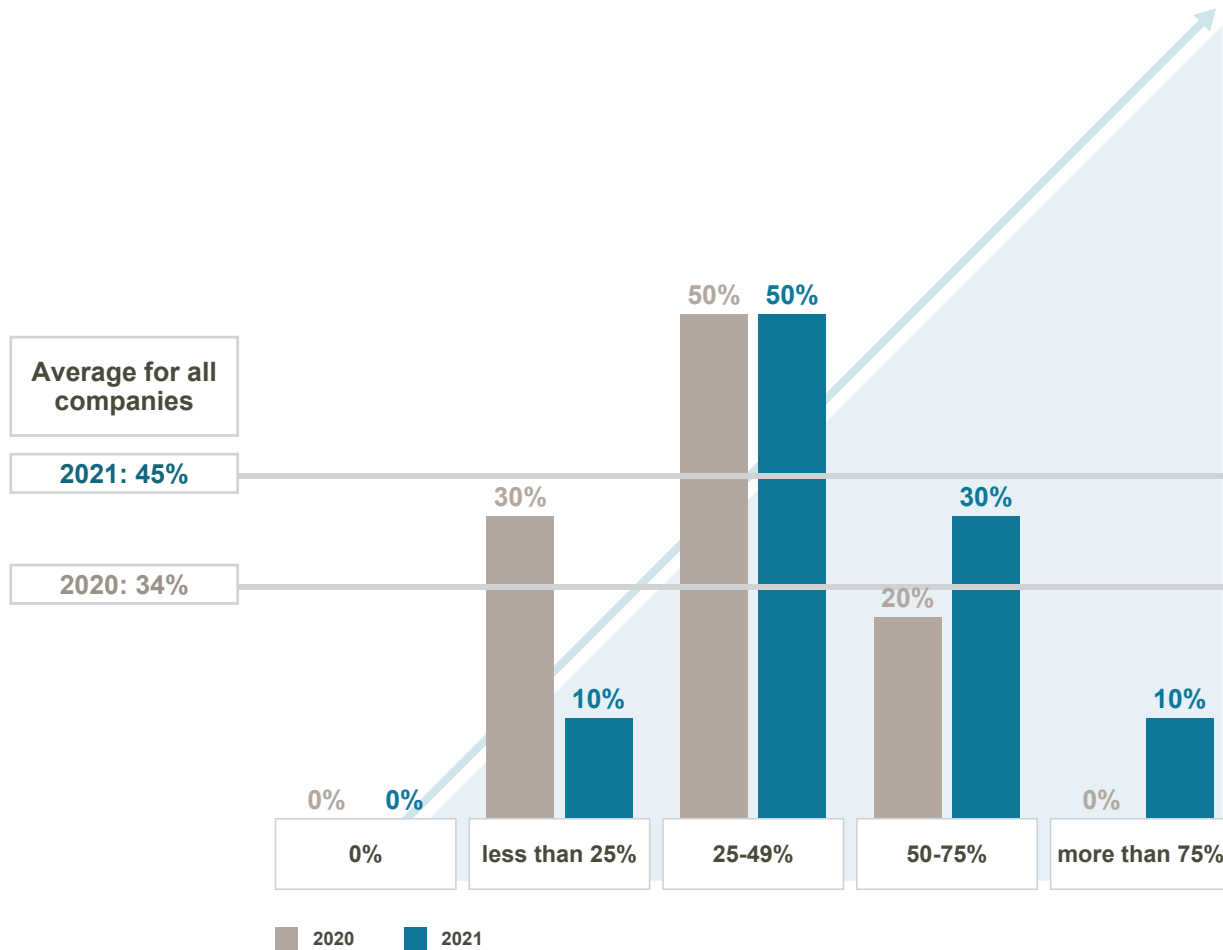
## What do you believe would most help the “bounce back” of exhibitions?



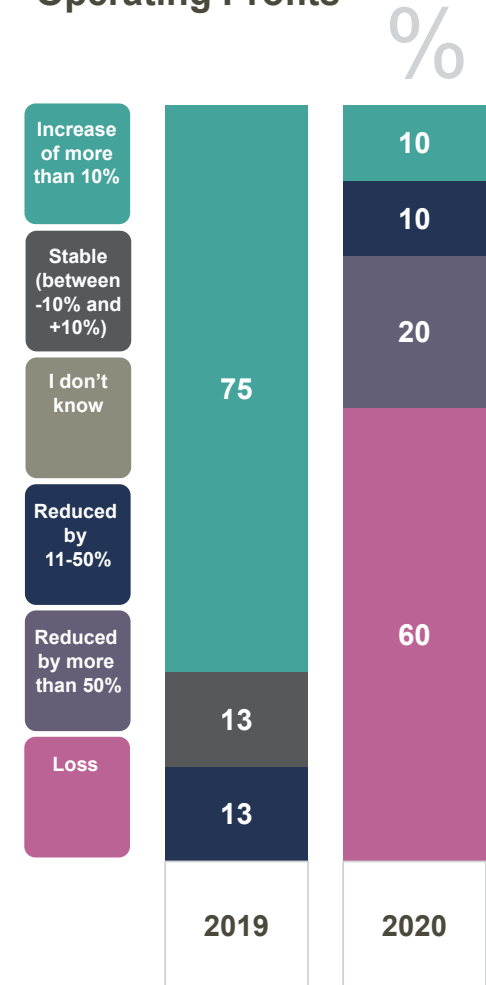




## Revenue compared to 2019



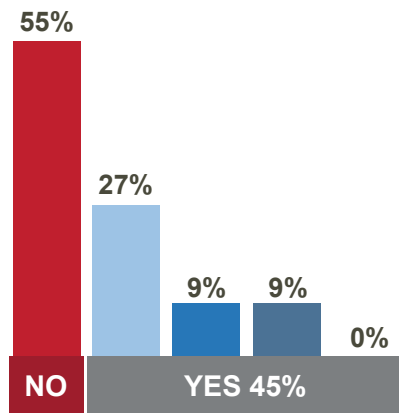
## Operating Profits



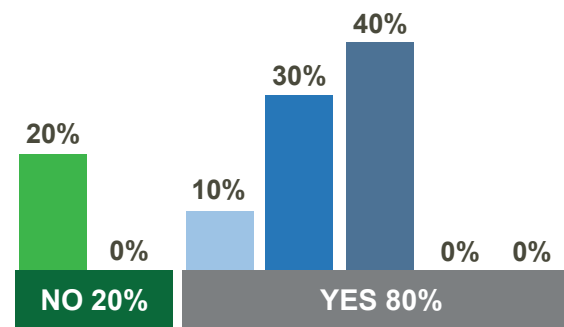
# Detailed results for Thailand



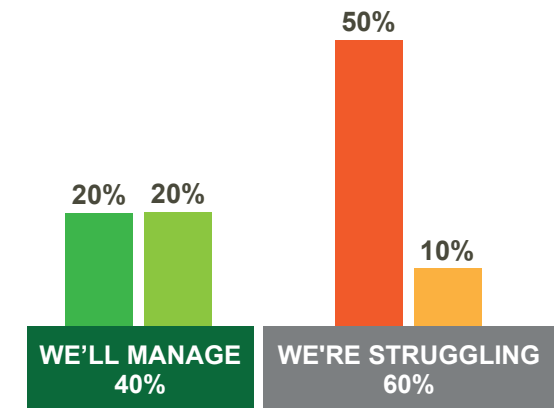
## Did your company benefit from public financial support?



## Have you had to reduce your workforce?



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



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

- 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

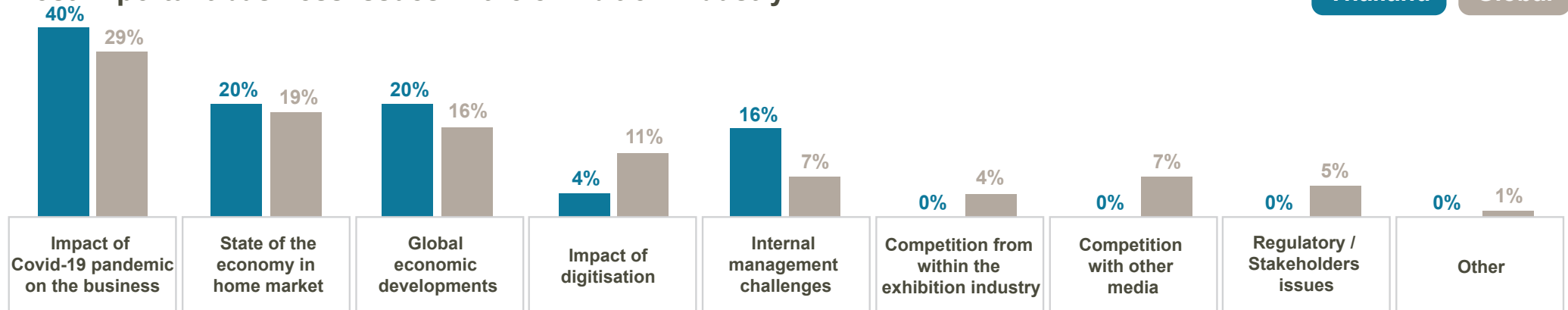
# Detailed results for Thailand



## Most important business issues in the exhibition industry

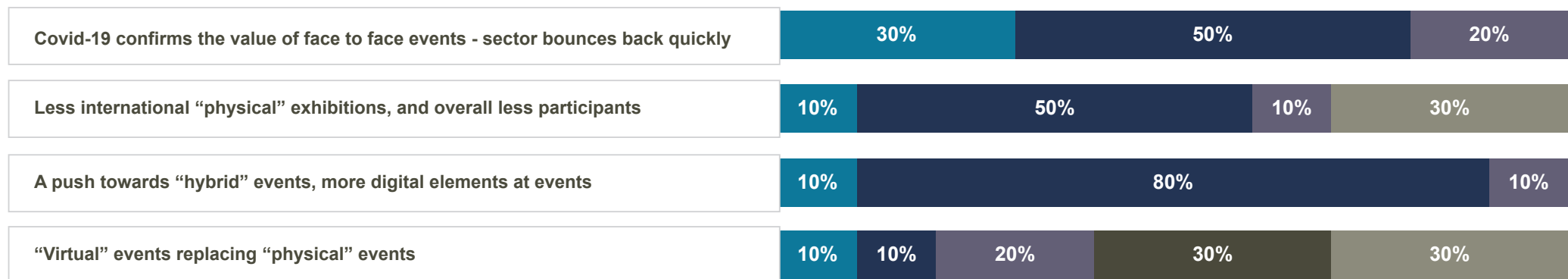
Thailand

Global



## Format of exhibitions in the coming years

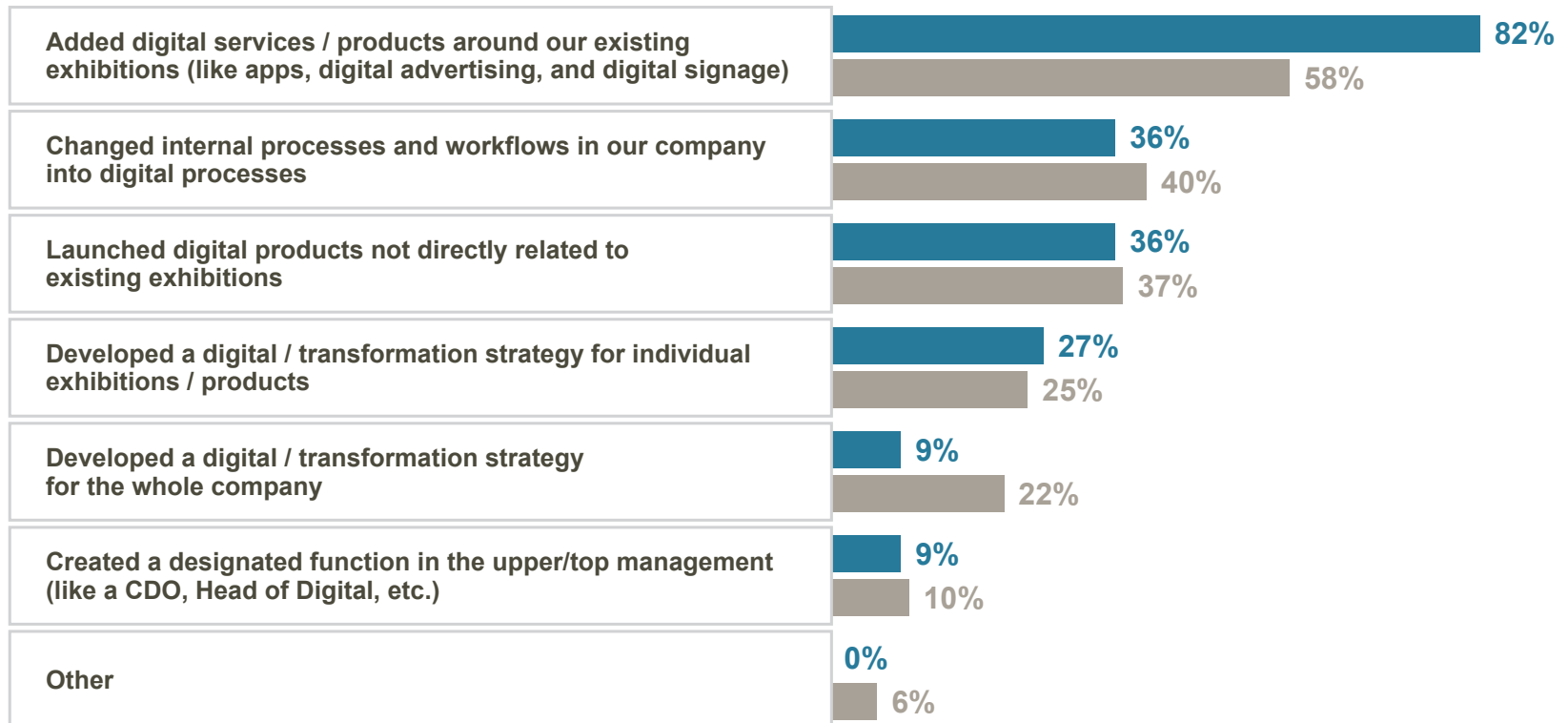
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not

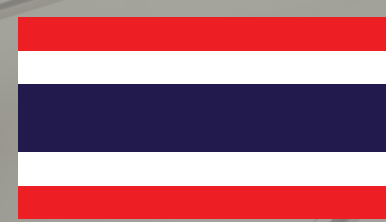




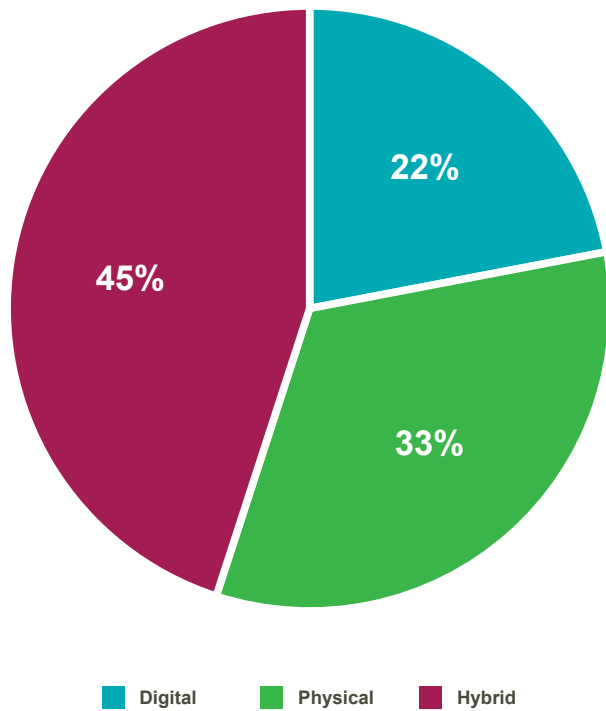
Thailand Global

## Digitisation: implementation in Thailand and globally

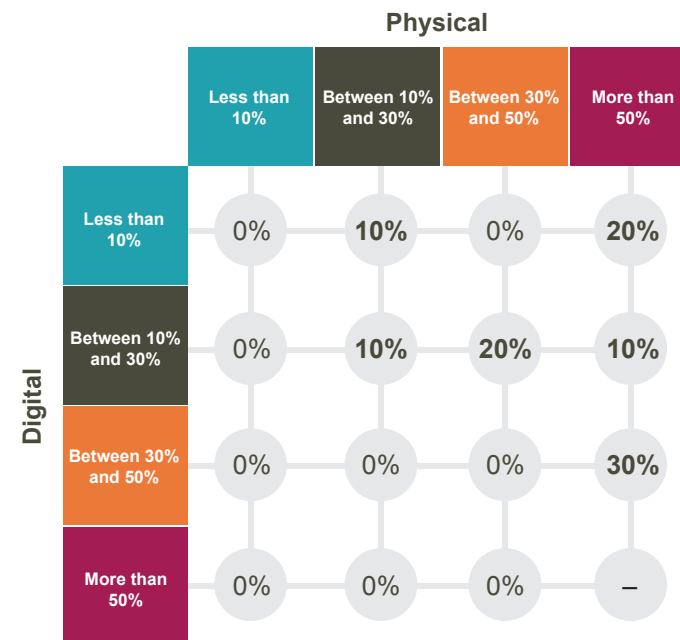




Number of fairs projected in 2021



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



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

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

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

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

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

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

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

## Overall:

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

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

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

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

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

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

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

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

# Appendix: Number of survey replies per country

## Total = 474 (in 64 countries/regions)

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



**UFI Headquarters / European Office**

17, rue Louise Michel  
92300 Levallois-Perret  
France

T: +33 1 46 39 75 00  
F: +33 1 46 39 75 01  
info@ufi.org

**UFI Asia & Pacific Regional Office**

Suite 4114, Hong Kong Plaza  
188 Connaught Road West  
Hong Kong, China

T: +852 2525 6129  
F: +852 2525 6171  
asia@ufi.org

**UFI Latin American Regional Office**

Corferias, Cra 37 # 24-67  
Auditorium Second Floor  
Bogota, Colombia

T: +571 3445486  
latam@ufi.org

**UFI Middle East & Africa Regional Office**

Info Salons Middle East Office  
Sheikh Zayed Rd  
City Tower 2, Office 2001A  
PO Box 58580  
Dubai  
United Arab Emirates

T: +971 (0)4 331 7180  
mea@ufi.org

Research Patron

**Freeman<sup>1</sup>**

web [www.ufi.org](http://www.ufi.org)

blog [www.ufilive.org](http://www.ufilive.org)

 @UFILive

 [www.facebook.com/ufilive](http://www.facebook.com/ufilive)

 [www.UFI.tv](http://www.UFI.tv)

 [www.linkedin.com/groups/4048434](http://www.linkedin.com/groups/4048434)

 UFI Official Account

**UFI Diamond Sponsors**

 **REDEFINE**  
YOUR BUSINESS EVENTS

 TCEB

 **QATAR**  
المجلس الوطني للسياحة  
National Tourism Council

  
Shenzhen World  
Exhibition & Convention Center  
深圳国际会展中心

**Freeman<sup>1</sup>**

