

# UFI Global Exhibition Barometer

**28<sup>th</sup> Edition**

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



Global



India



Southern Africa



Japan



United Kingdom



Macau



Spain



Malaysia



Peru



Russian Federation



Central & South America



Singapore



South Korea



US



Mexico



Thailand



Argentina



Brazil



Indonesia



France



Australia



## Global Reports



Analysing the global exhibition industry with global comparisons.

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

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

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

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

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

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

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

## Topical Reports



Focused reports on challenges and developments within the exhibition industry.

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

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

**Best Practices Compendiums** – Case studies of successful industry developments.

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

## UFI Research Patron: Freeman<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)

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Welcome to the 28th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, conducted in January 2022. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 29 specific markets.

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

With 401 participating companies, the reach of this barometer is large. This is the result of global collaboration, and we wish to thank all the following associations who take part in the project: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFE (Spanish Trade Fairs Association) in Spain, AFEP (Asociacion de Ferias del Peru) in Peru, AFIDA (Asociación Internacional de Ferias de América) in Central & South America, AKEI (The Association of Korean Exhibition Industry) in South Korea, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, AOCA (Asociación Argentina de Organizadores y Proveedores de Exposiciones, Congresos, Eventos y de Burós de Convenciones) in Argentina, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA/ASPERAPI (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan,

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

## Important remarks

- The number of replies to the current survey (401 from 53 countries and regions - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 24 markets where a significant number of answers were obtained.
- Due to decimal rounding, the percentage values indicated in some charts may not exactly sum up to 100%. This applies in particular to the charts related to the public financial support.

Questions related to this survey can be addressed at [research@ufi.org](mailto:research@ufi.org)

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

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

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

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

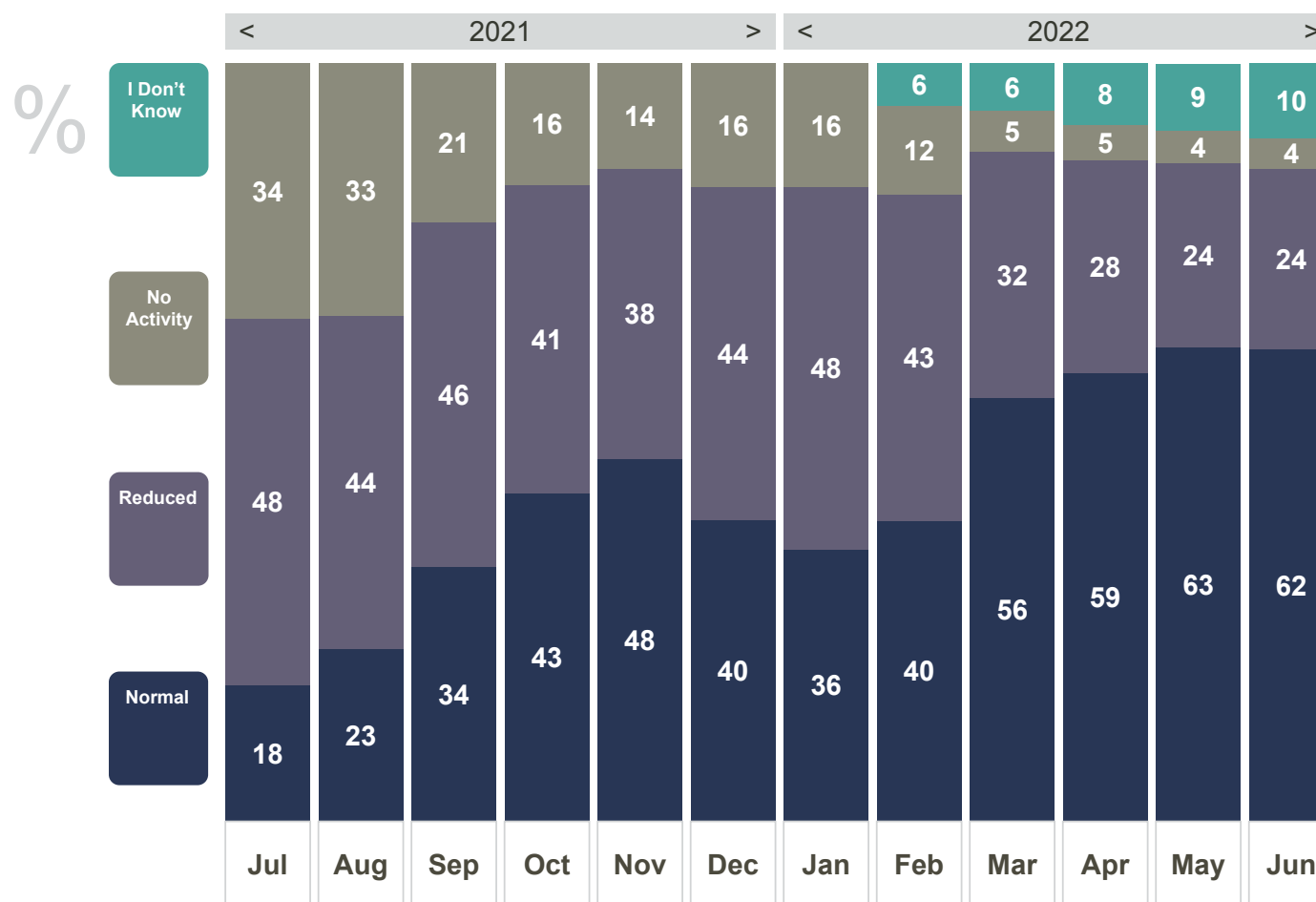
- In several major markets across Central and South America, most companies saw normal activity levels between September and November 2021, and more than eight in ten expect normal activity levels from February 2022.
- In Europe, most companies saw normal activity levels between October and November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

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

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

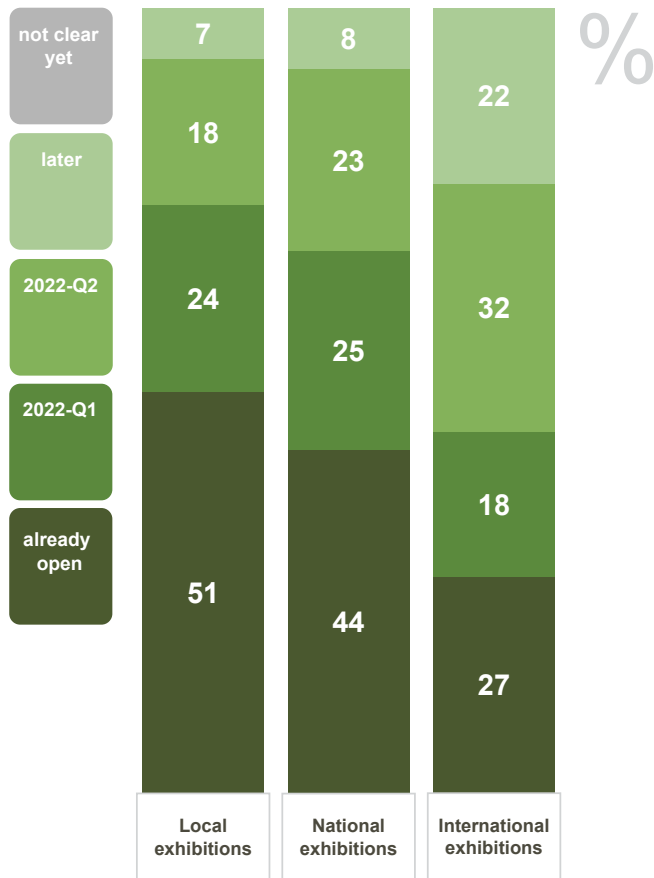


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

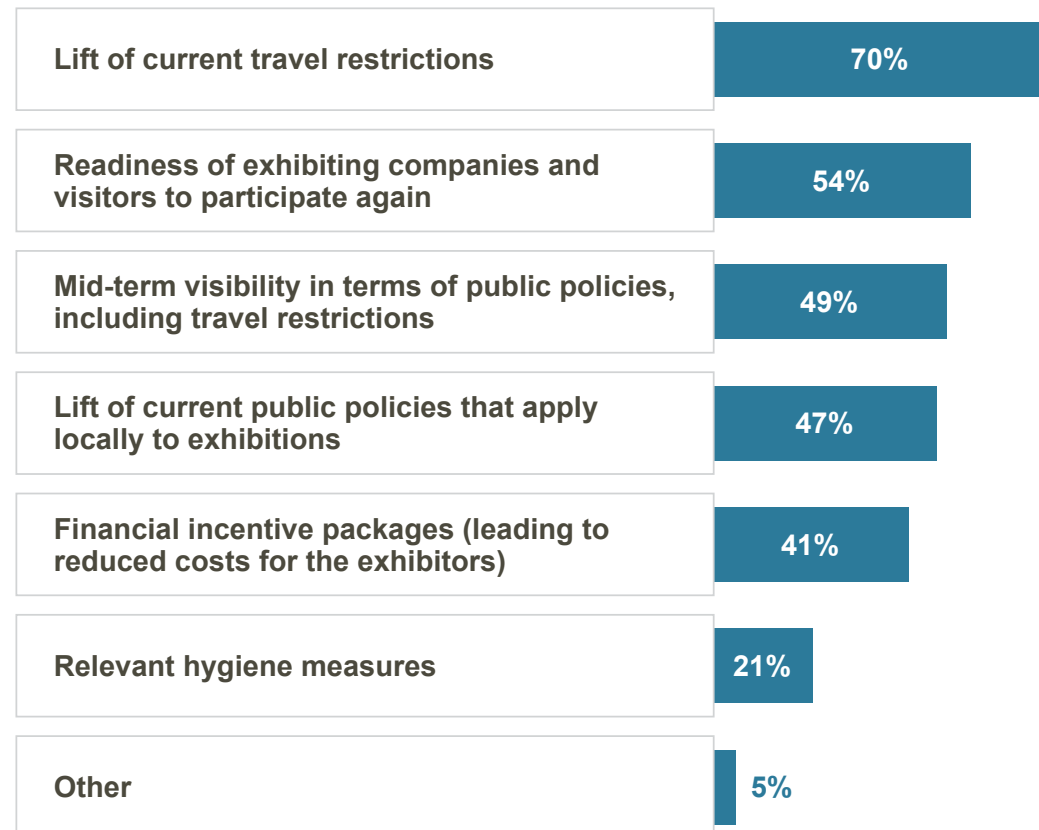




## When do you believe exhibitions will open again in your city?



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



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

## The following charts present:

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

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

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

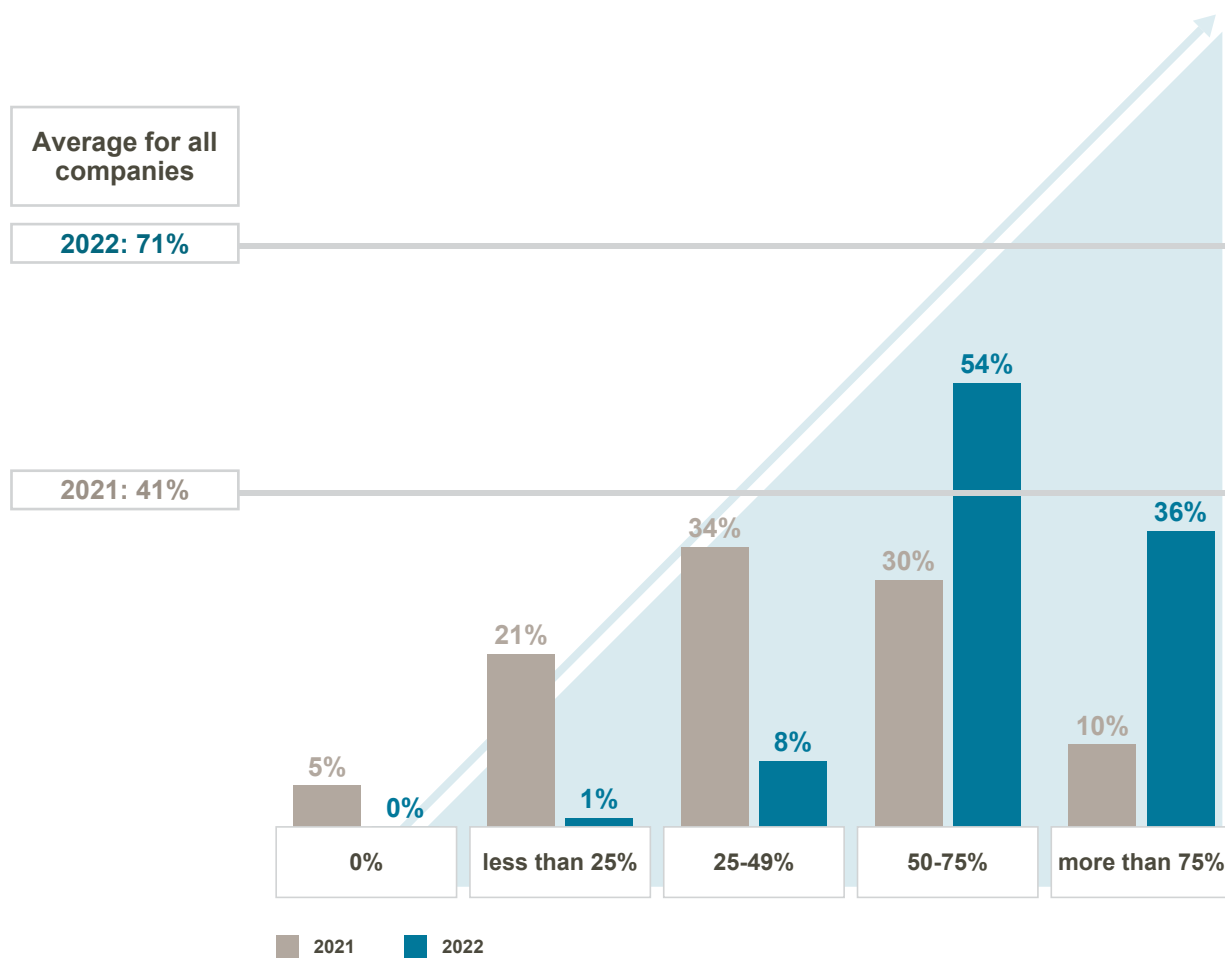
In terms of operating profit for 2021, 27% of companies globally reported a loss, and 26% reported a reduction of more than 50%, compared to 2019 levels. All regions include countries with a higher than average proportion of companies declaring a loss in 2021:

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

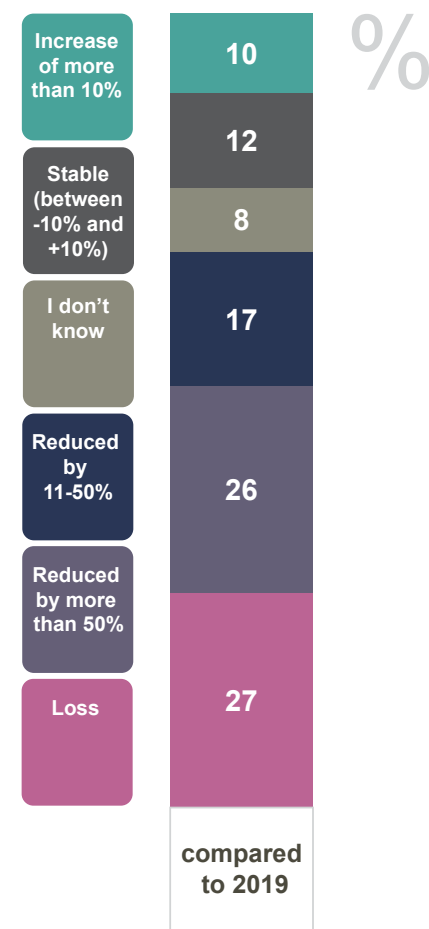




## Revenue compared to 2019



## Operating Profits 2021

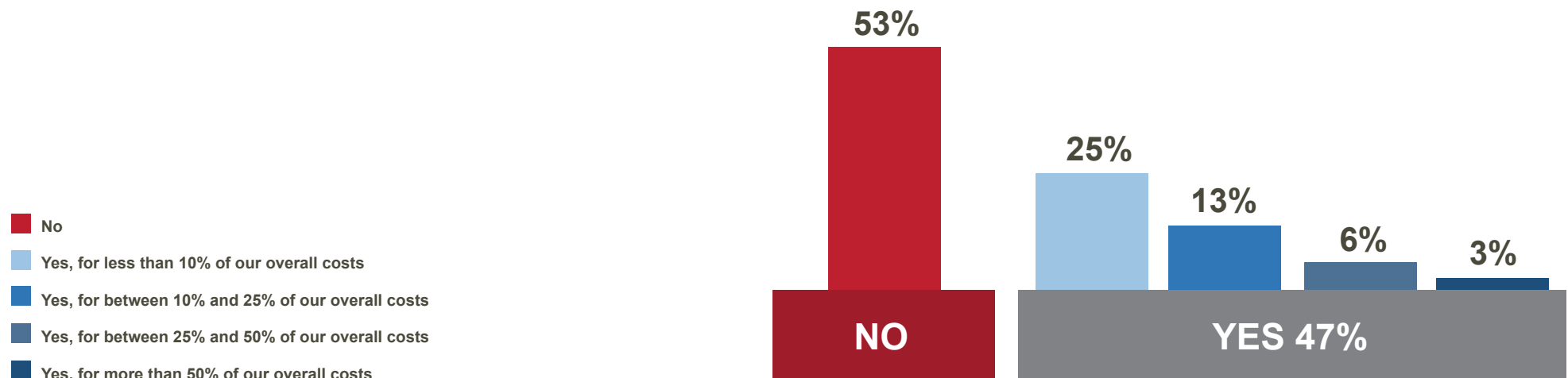


The 28th Barometer surveyed the impact of the COVID-19 crisis regarding public financial support. Overall, 53% of companies received no public financial support, and for the majority of those who did, financial public aid represented less than 10% of their overall costs.

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



## Did your company benefit from public financial support?



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

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

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

“Internal management challenges” represents the key business issue across Australia, Argentina and Mexico (22% of respondents), Spain (21%), Colombia (20%), Thailand (19%) and South Africa (18%).

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

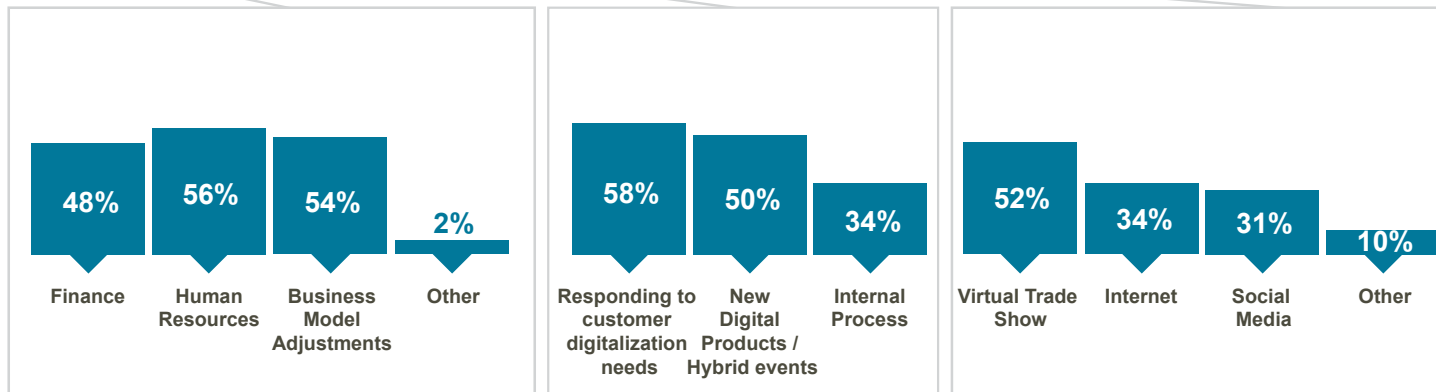
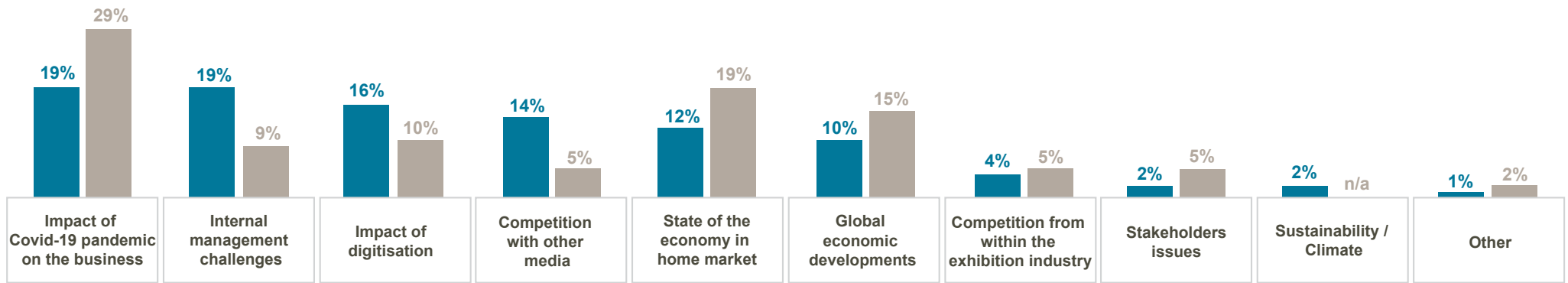
The picture is different depending on the activity type of respondents. (“Organiser”, “Venue only” and “Service provider only”).

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

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

Results from current survey - January 2022

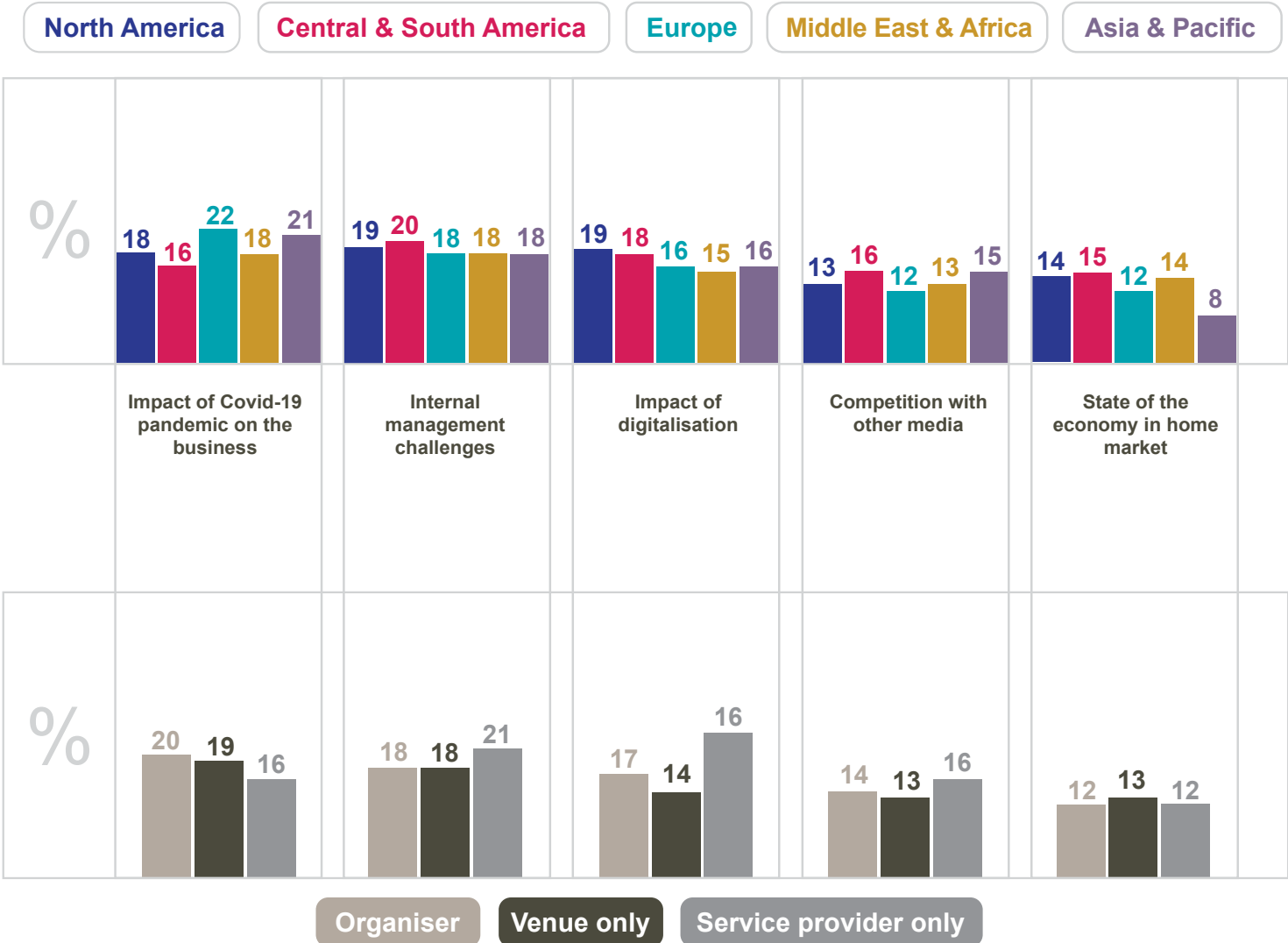
Results from previous survey - June 2021



(multiple answers possible)

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

## Actions put in place



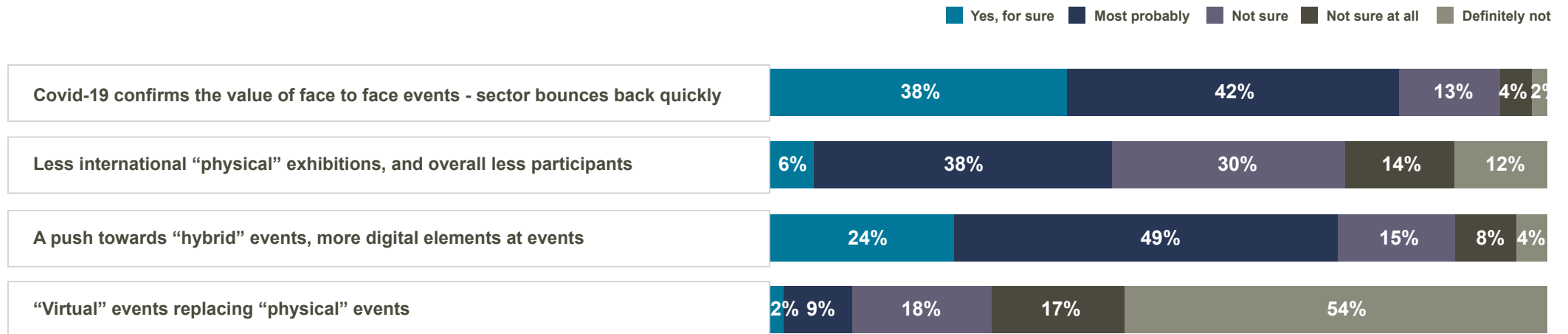
The 28th Barometer focussed on possible driving trends for the format of exhibitions in the coming years, by asking companies to assess four different statements. As the same question was in the previous editions of this research, the comparisons allow to identify trends.

The results show no significant differences across different regions.

## The global results indicate that:

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

# Format of Exhibitions in the Coming Years World





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

## Global results indicate that:

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

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

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

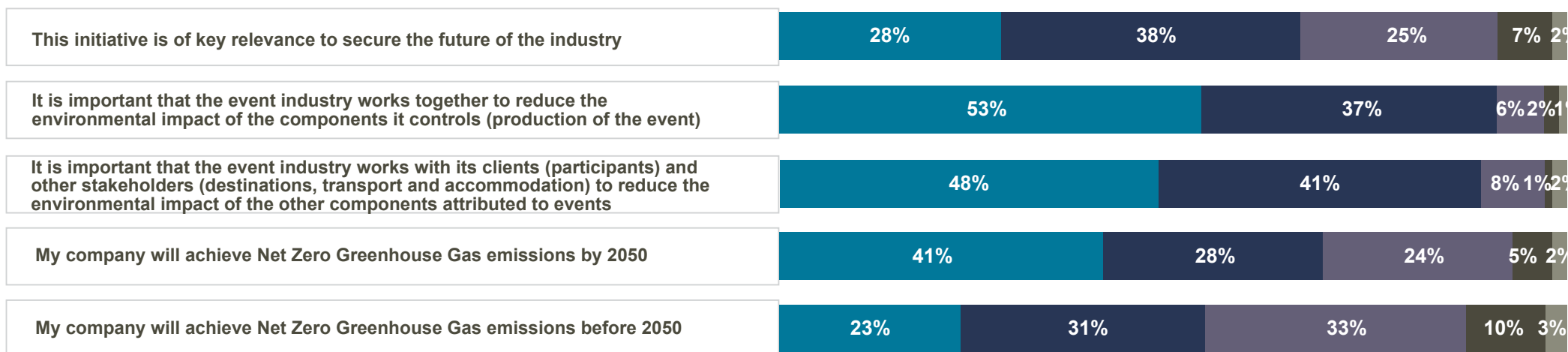
69% of respondents are confident that “My company will achieve Net Zero Greenhouse Gas emissions by 2050” (with 41% stating “Yes, for sure” and 28% stating “Most probably”), while 24% are unsure. Country results highlight a significant specificity about the first question: compared to the global average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

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

# Climate Change and Net Zero Carbon Events World



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



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

## North America:

Mexico  
US

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## Central & South America:

Argentina  
Brazil  
Chile  
Colombia

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## Europe:

France  
Germany  
Italy  
Russian Federation  
Spain  
Turkey  
United Kingdom

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## Middle East & Africa:

UAE  
South Africa

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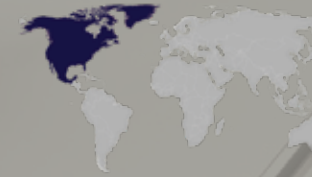
## Asia-Pacific:

Australia  
China  
Hong Kong  
India  
Japan  
Malaysia  
Singapore  
South Korea  
Thailand

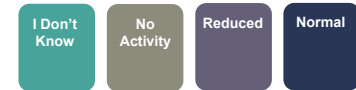
# North America



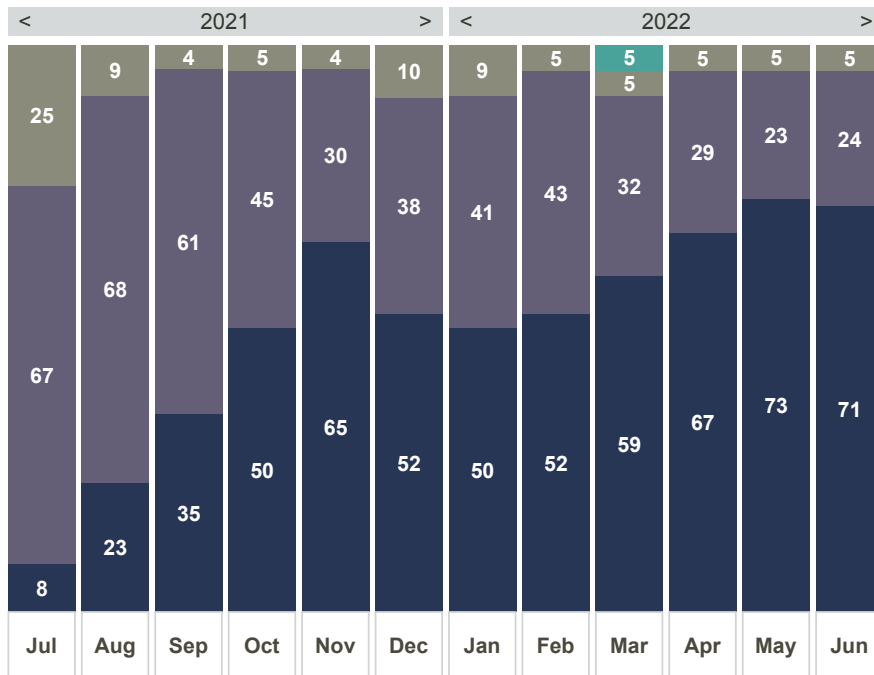
# Operations - Reopening Exhibitions North America



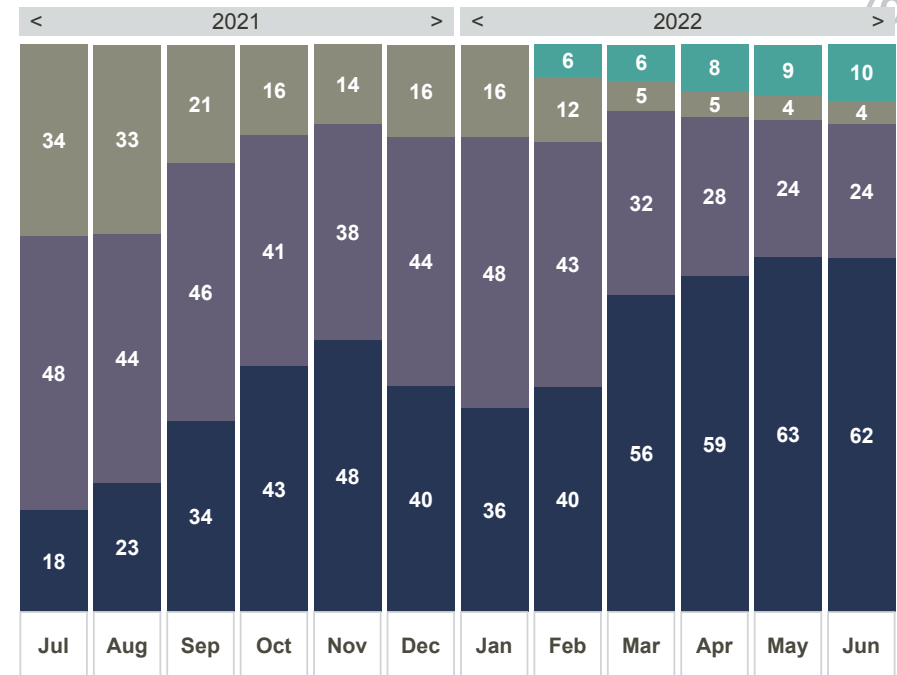
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



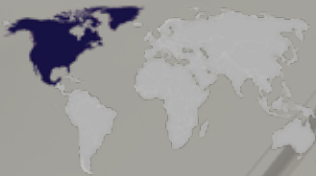
## North America



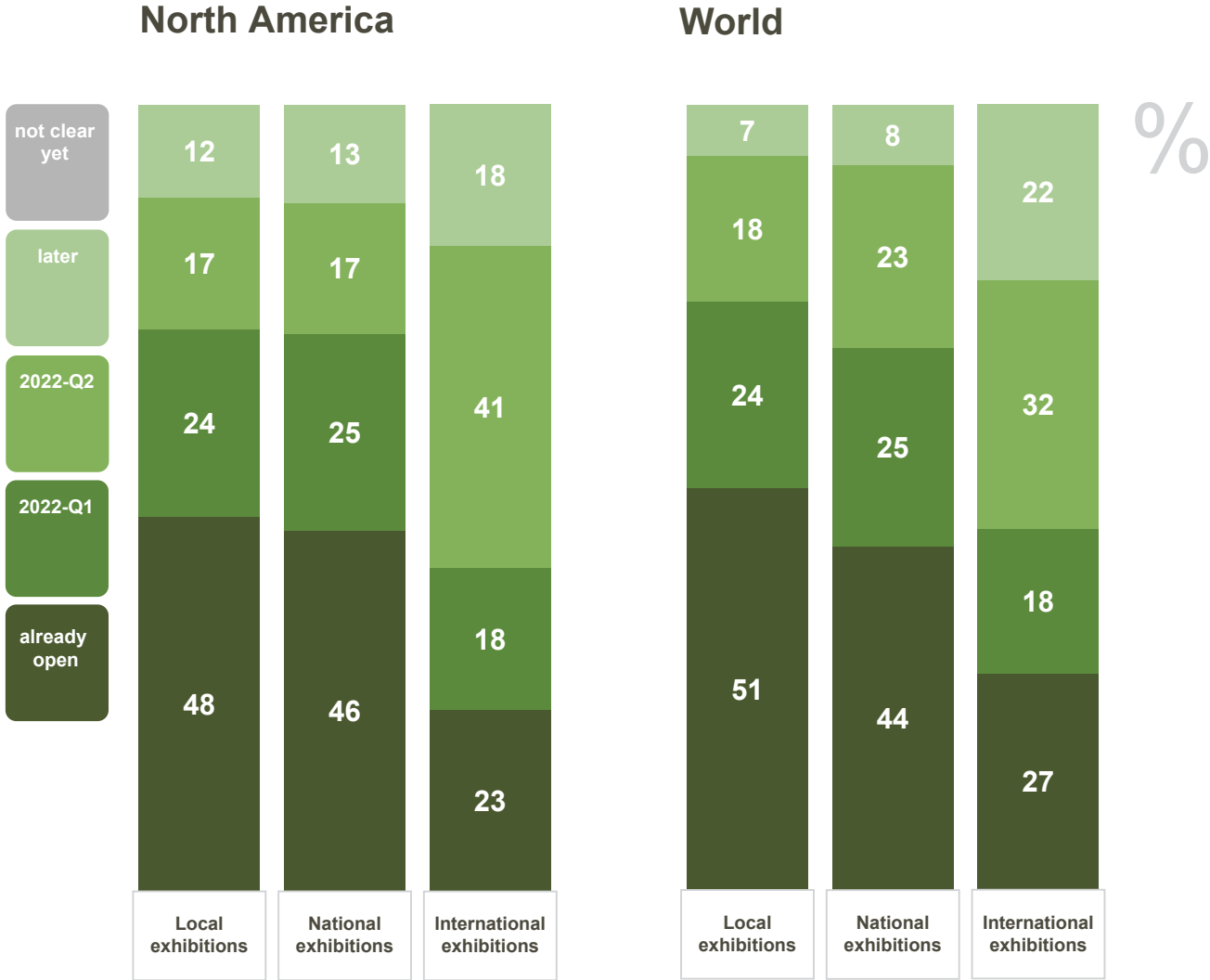
## World

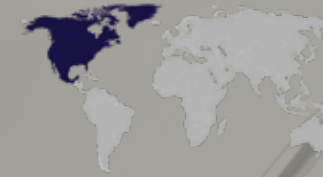


# Operations - Reopening Exhibitions North America



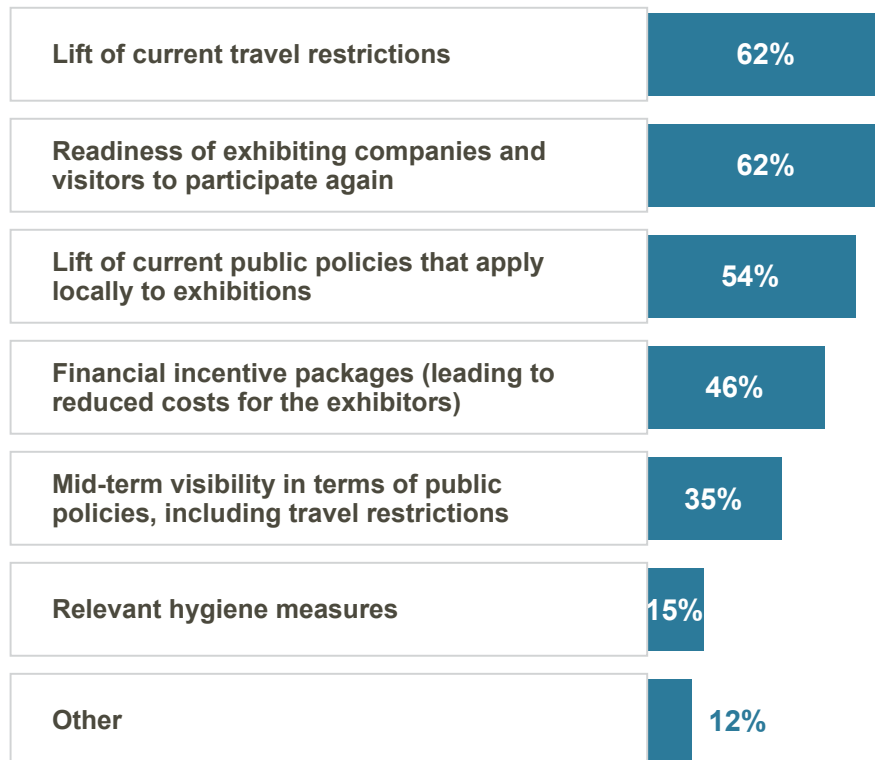
When do you believe exhibitions will open again in your city?



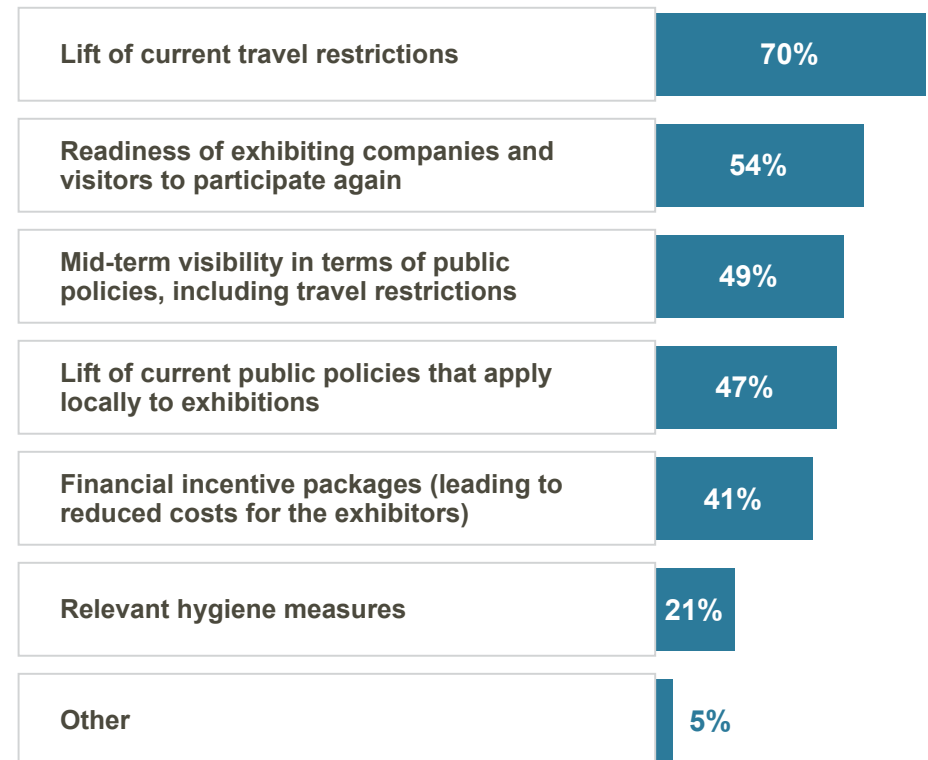


## What do you believe would most help the “bounce back” of exhibitions?

### North America

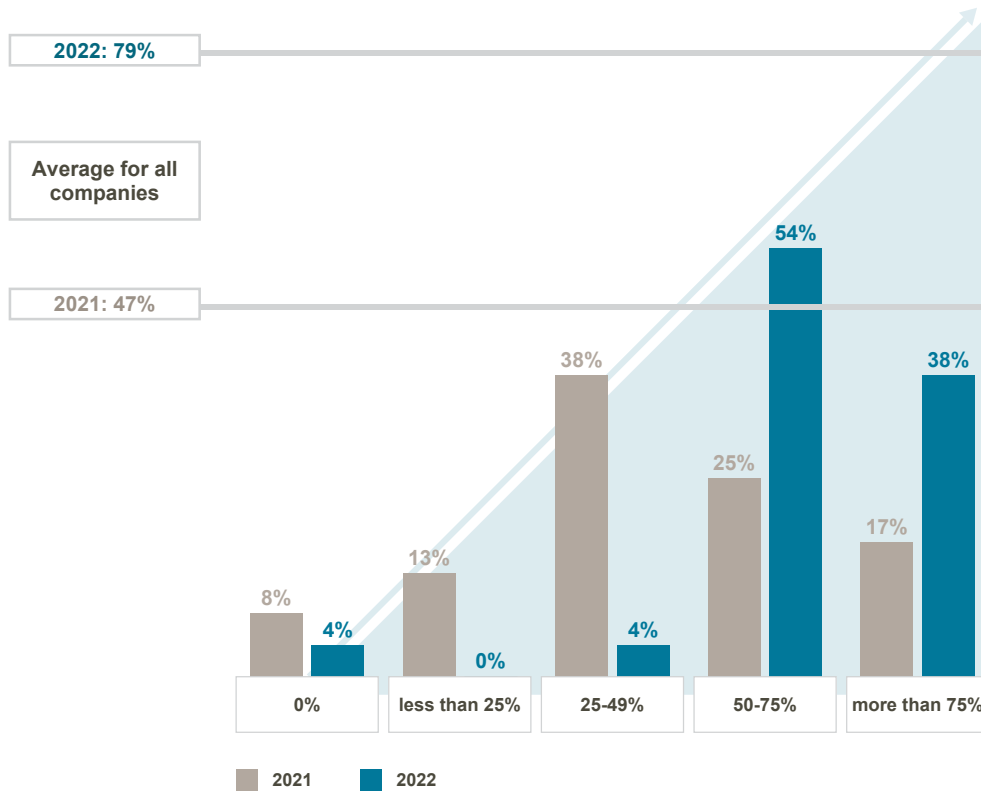


### World

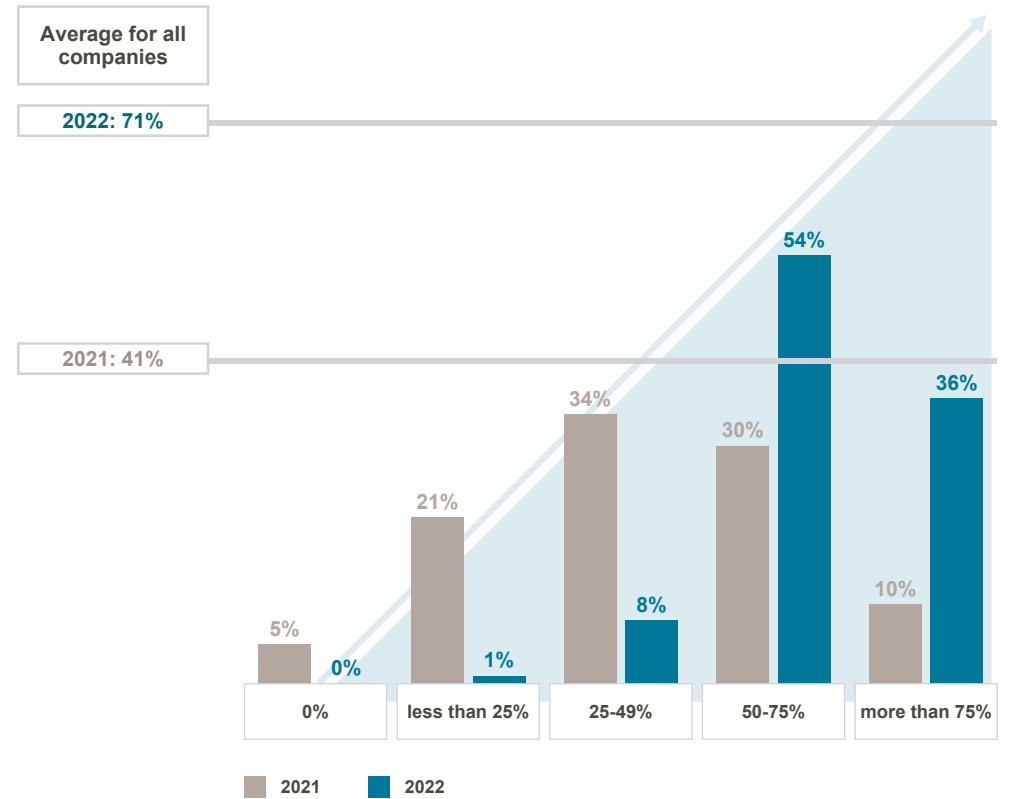


## Revenue compared to 2019

### North America



### World





# Operating profit 2019 North America

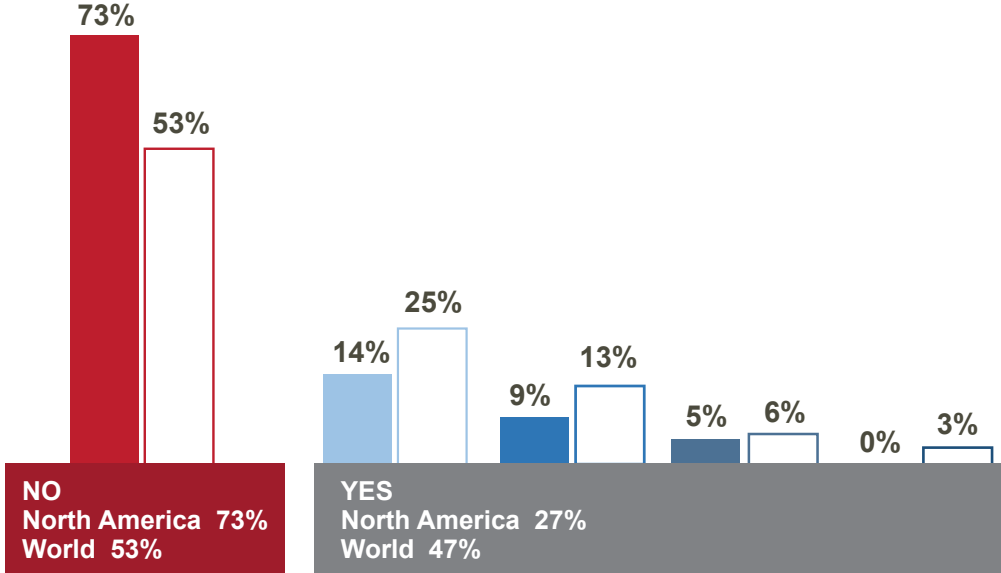




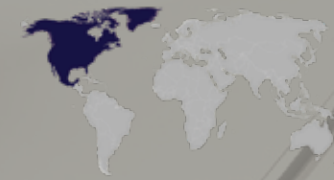
## Did your company benefit from public financial support?

**North America** World

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

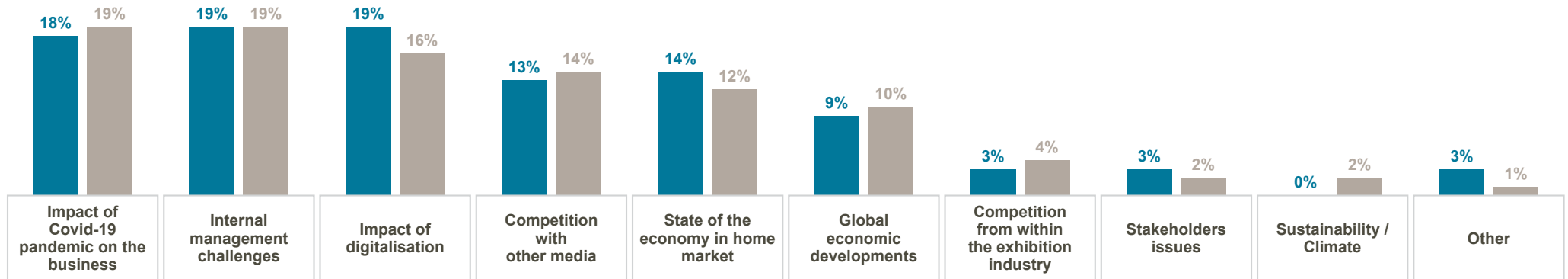


# Most Important Business Issues - Format of Exhibitions - North America



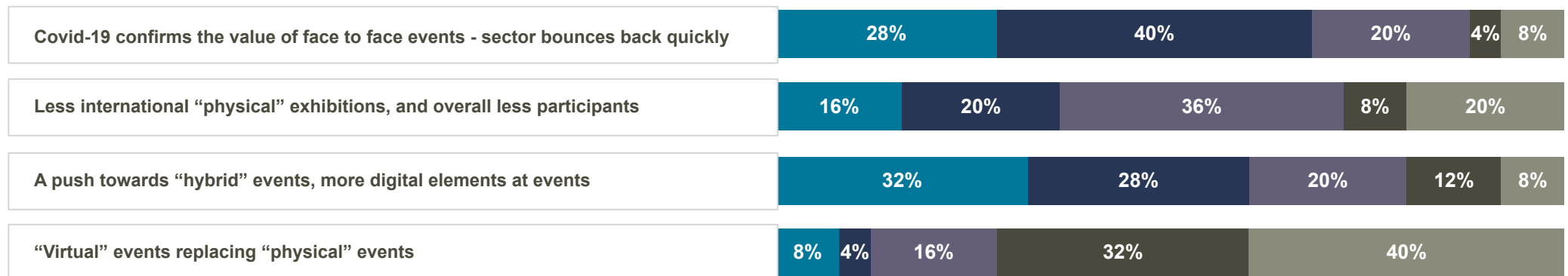
## Most important business issues in the exhibition industry

North America Global



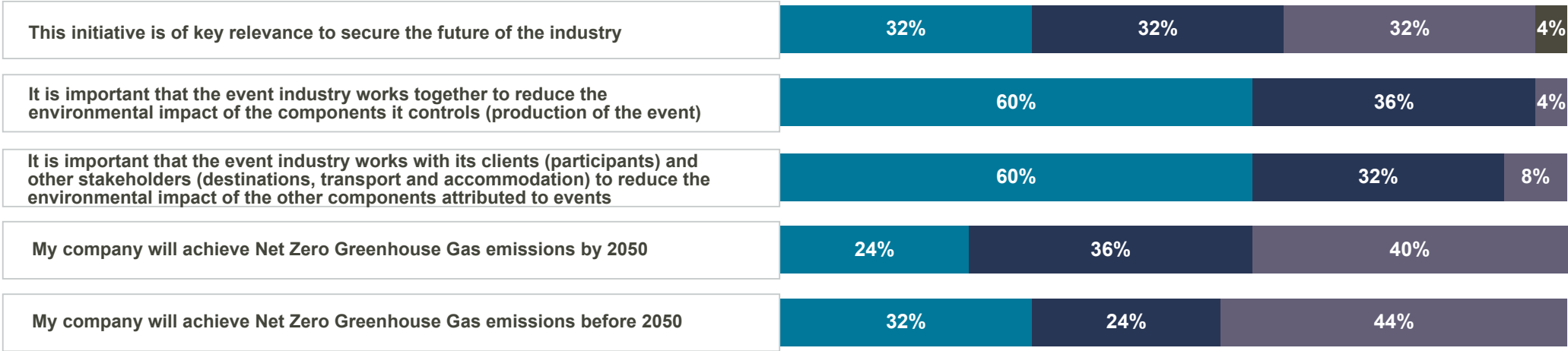
## Format of exhibitions in the coming years

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



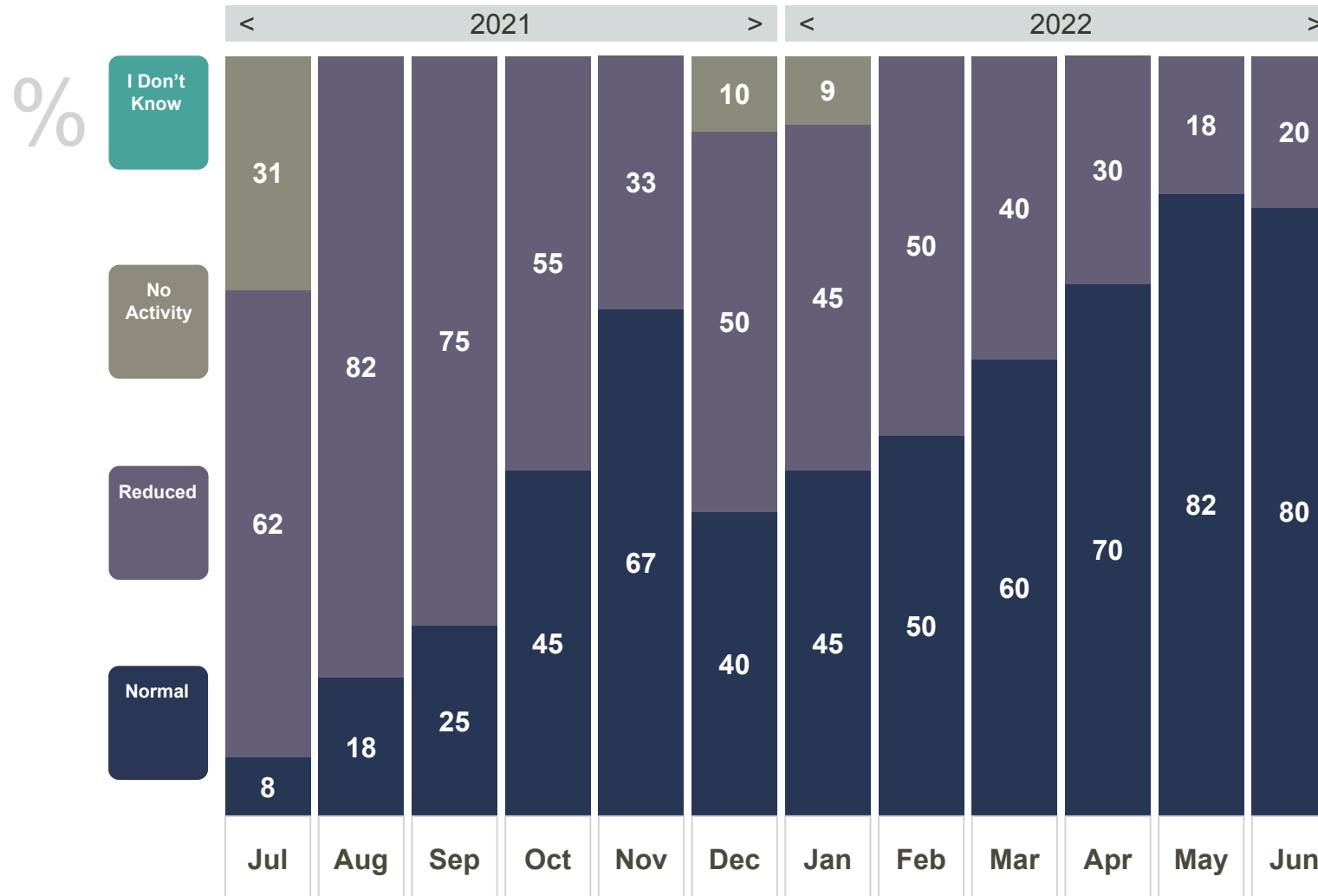
## Climate Change and Net Zero Carbon Events

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



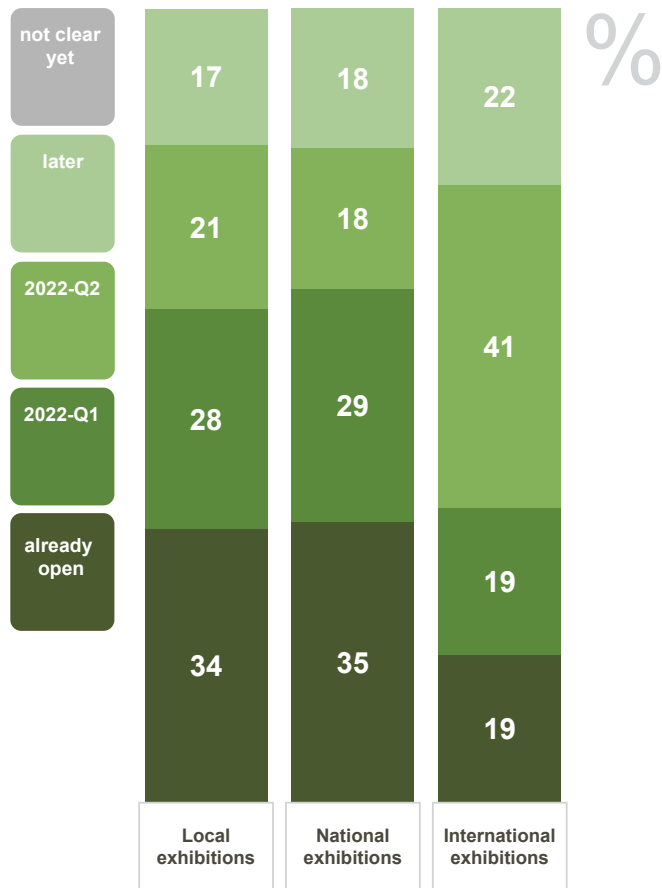


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

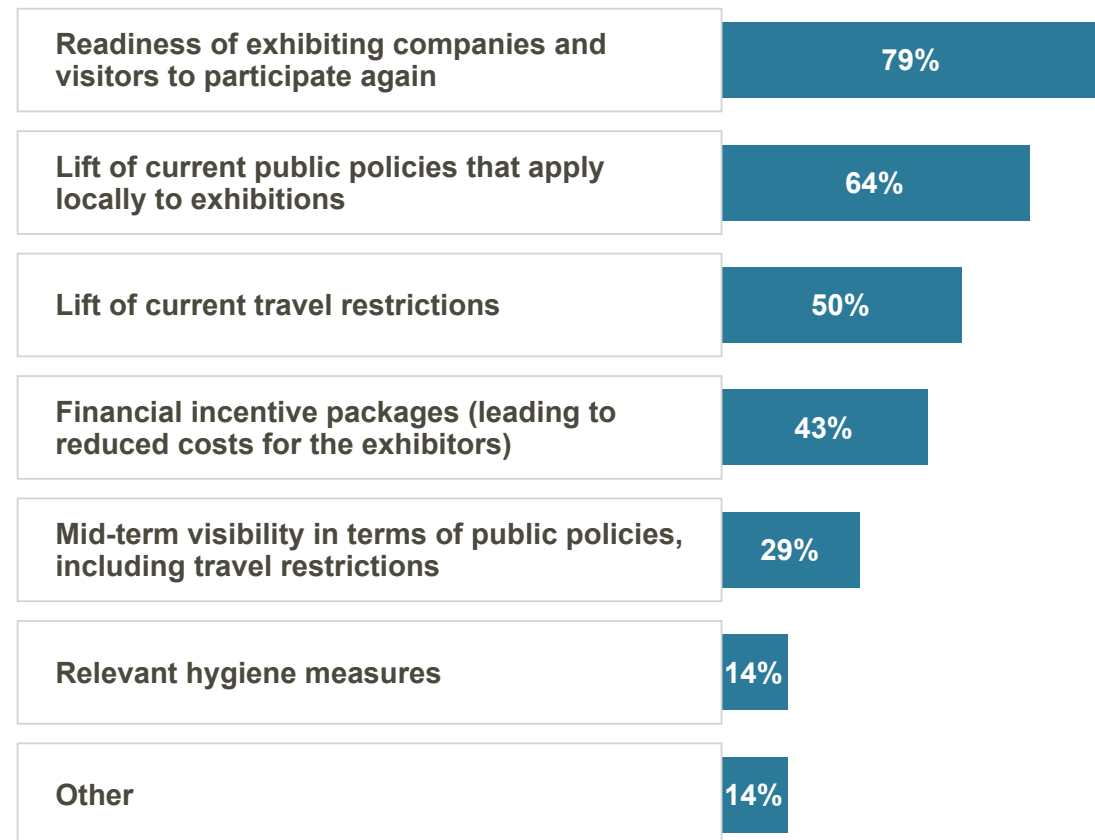




## When do you believe exhibitions will open again in your city?

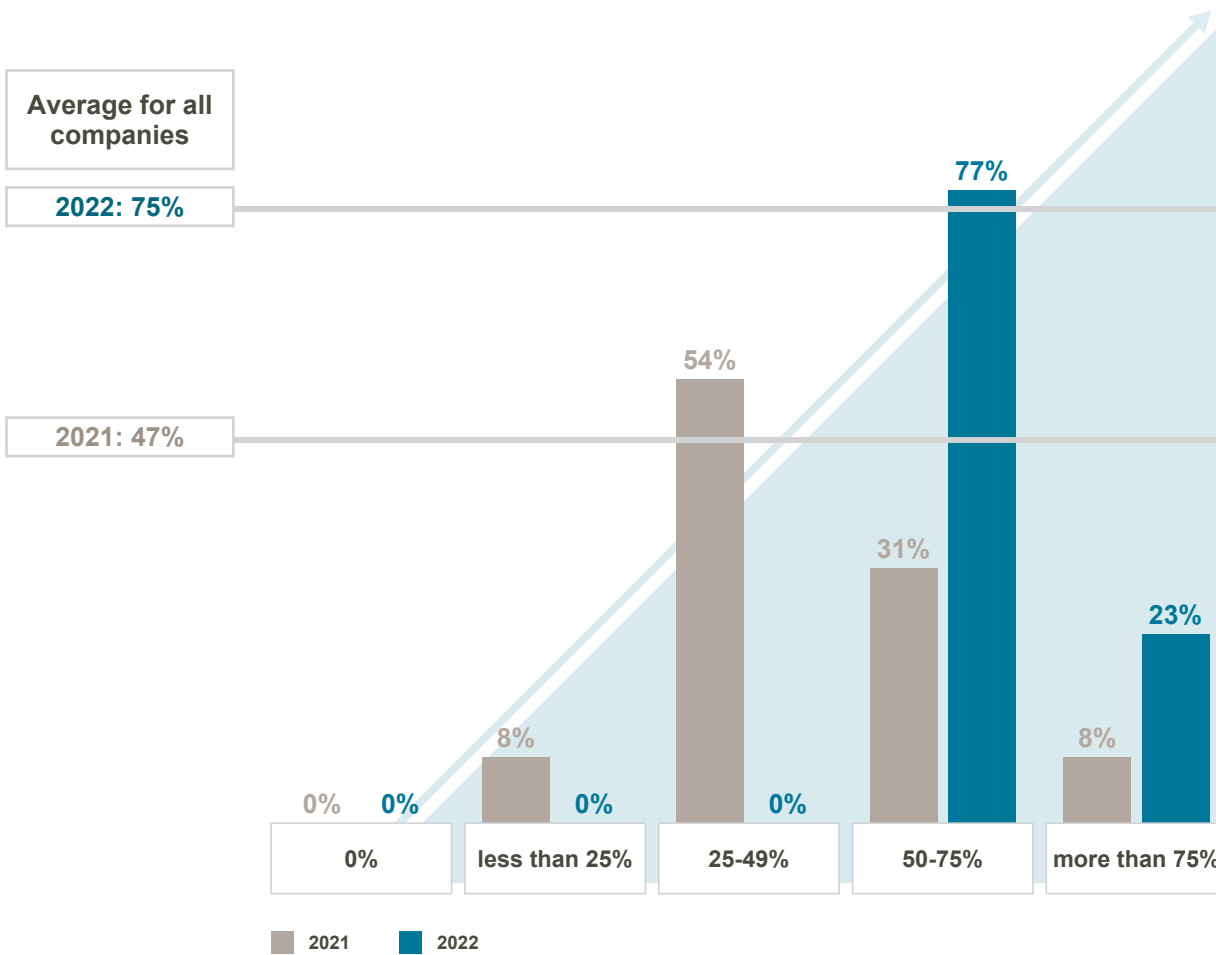


## What do you believe would most help the “bounce back” of exhibitions?

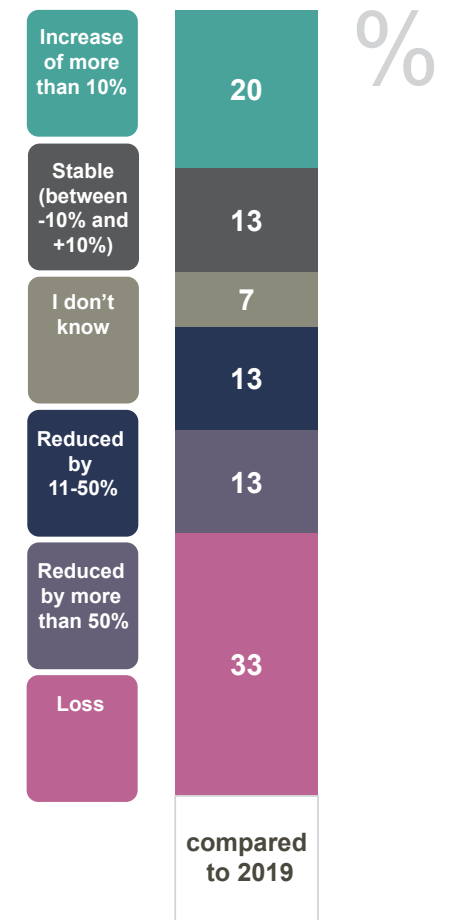




## Revenue compared to 2019



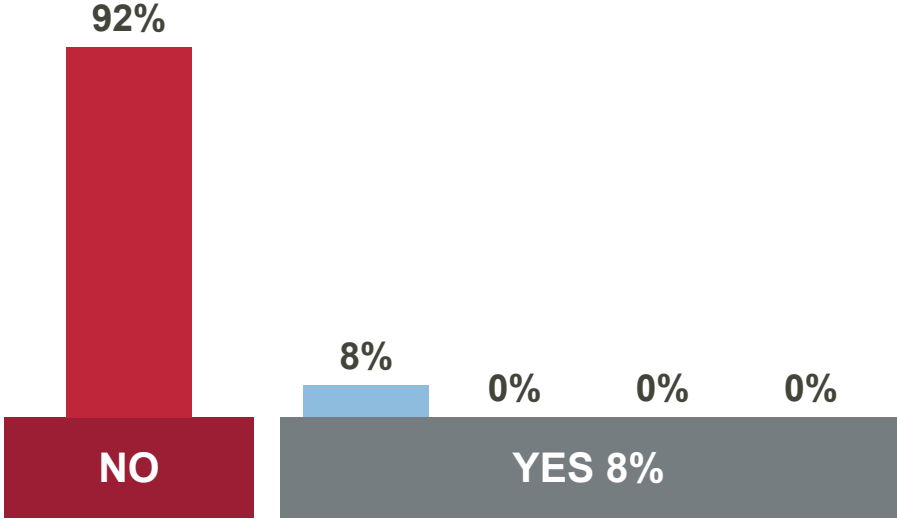
## Operating Profits 2021





## Did your company benefit from public financial support?

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

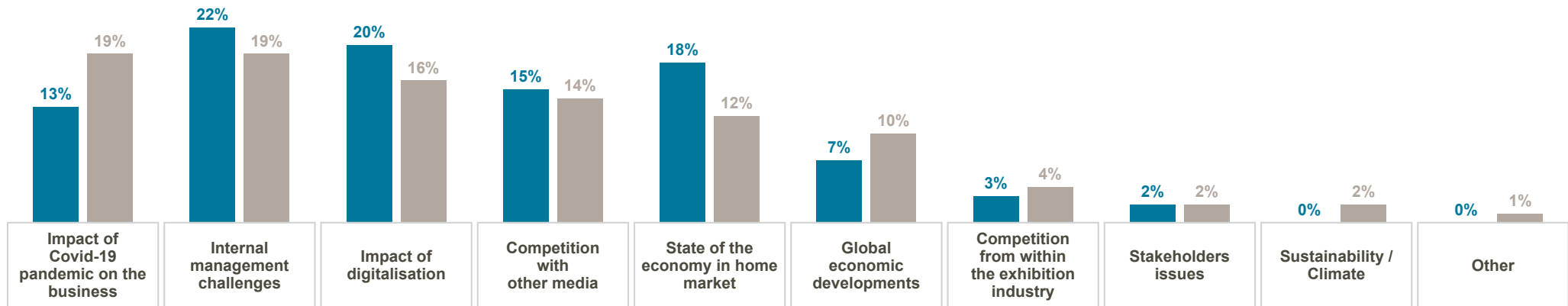






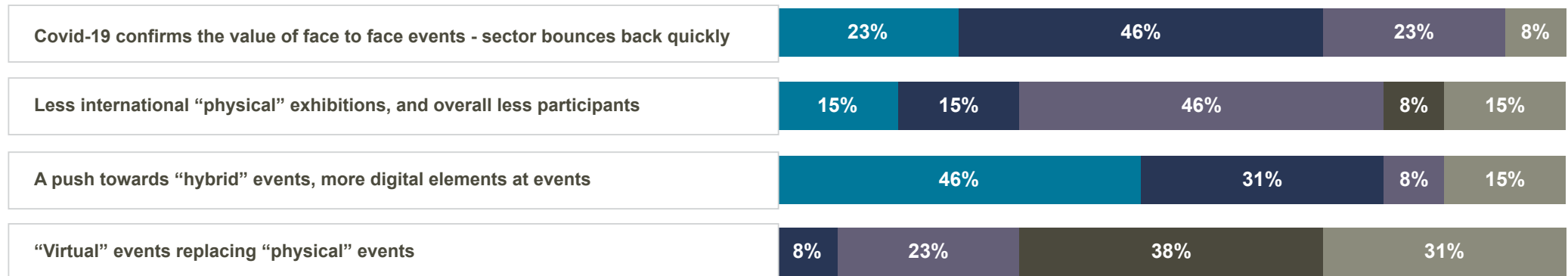
## Most important business issues in the exhibition industry

Mexico Global



## Format of exhibitions in the coming years

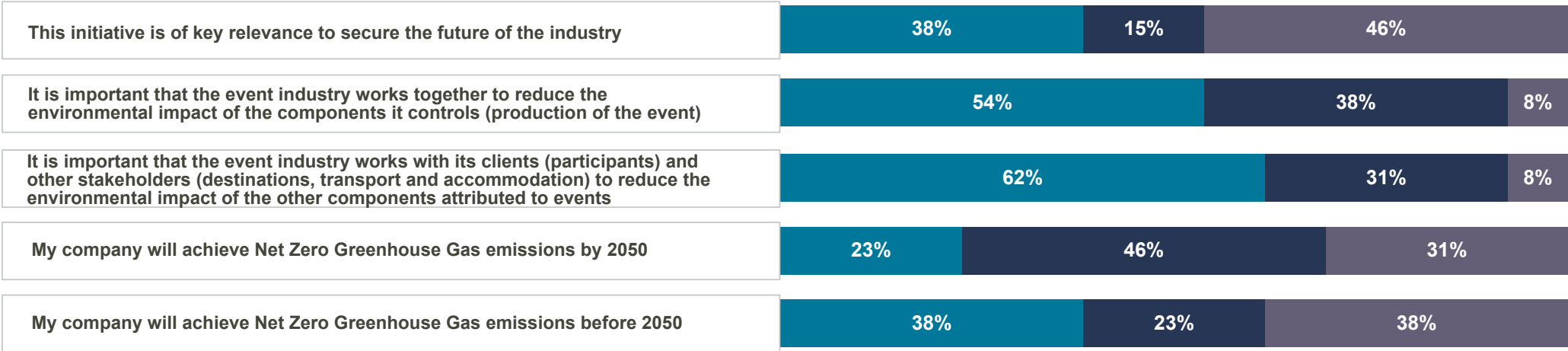
Yes, for sure Most probably Not sure Not sure at all Definitely not





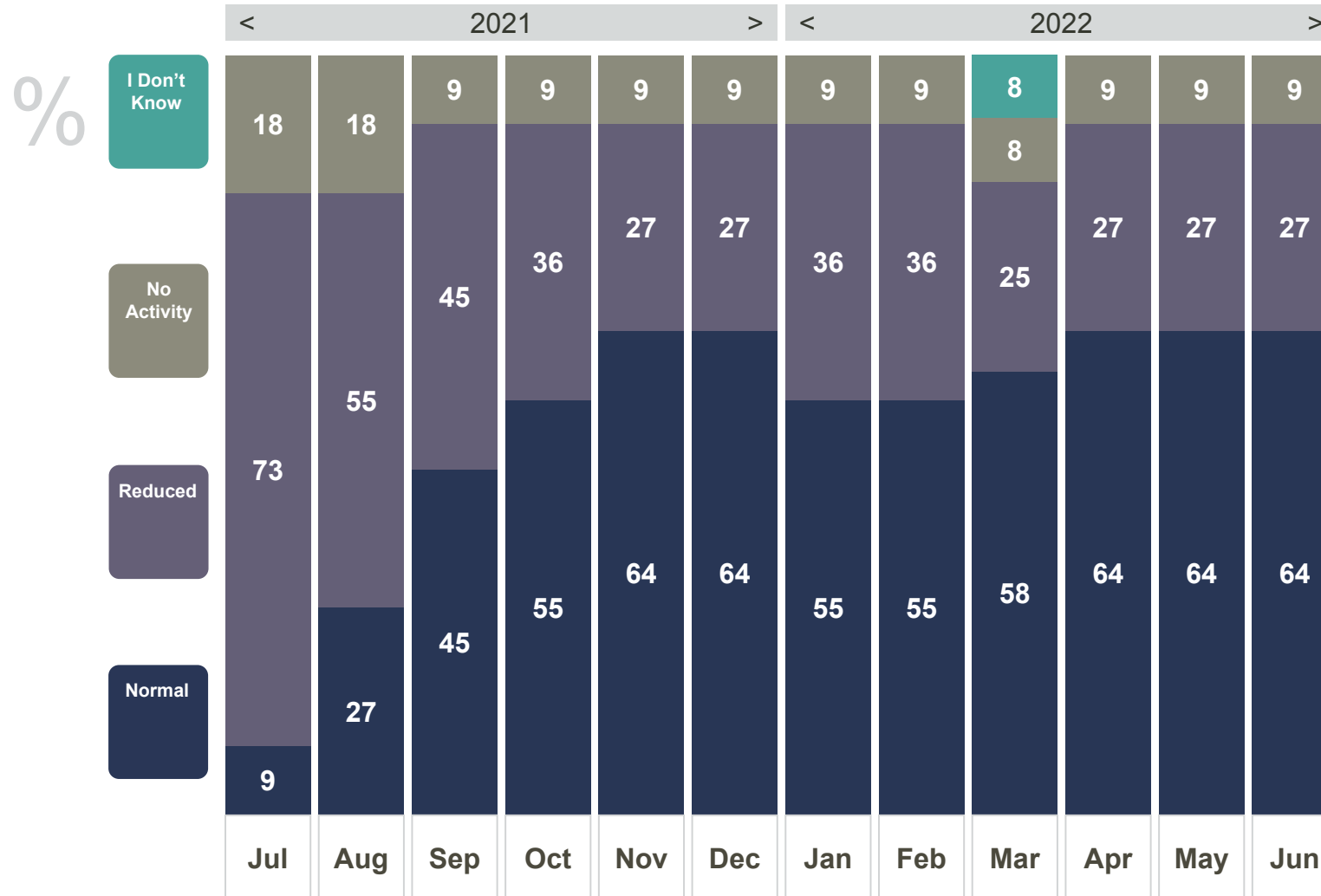
## Climate Change and Net Zero Carbon Events

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



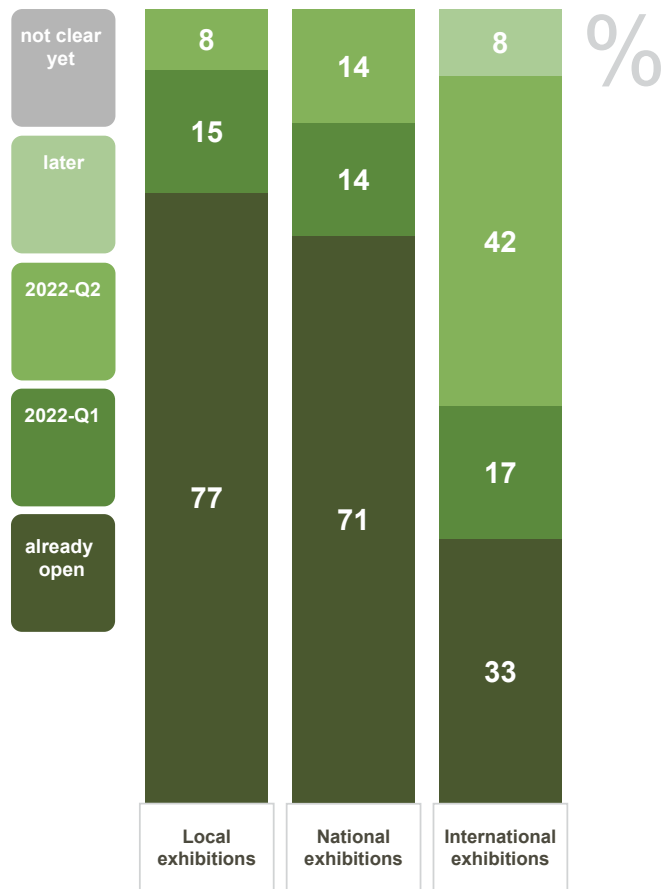


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

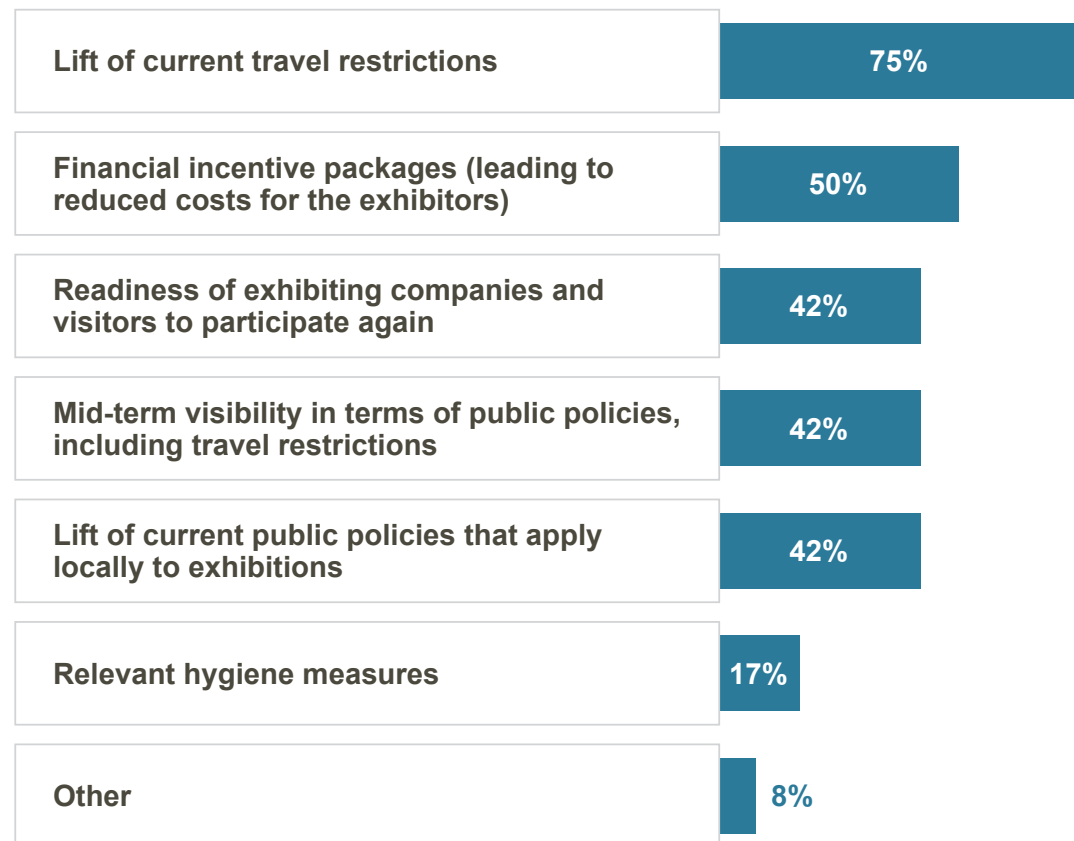




## When do you believe exhibitions will open again in your city?

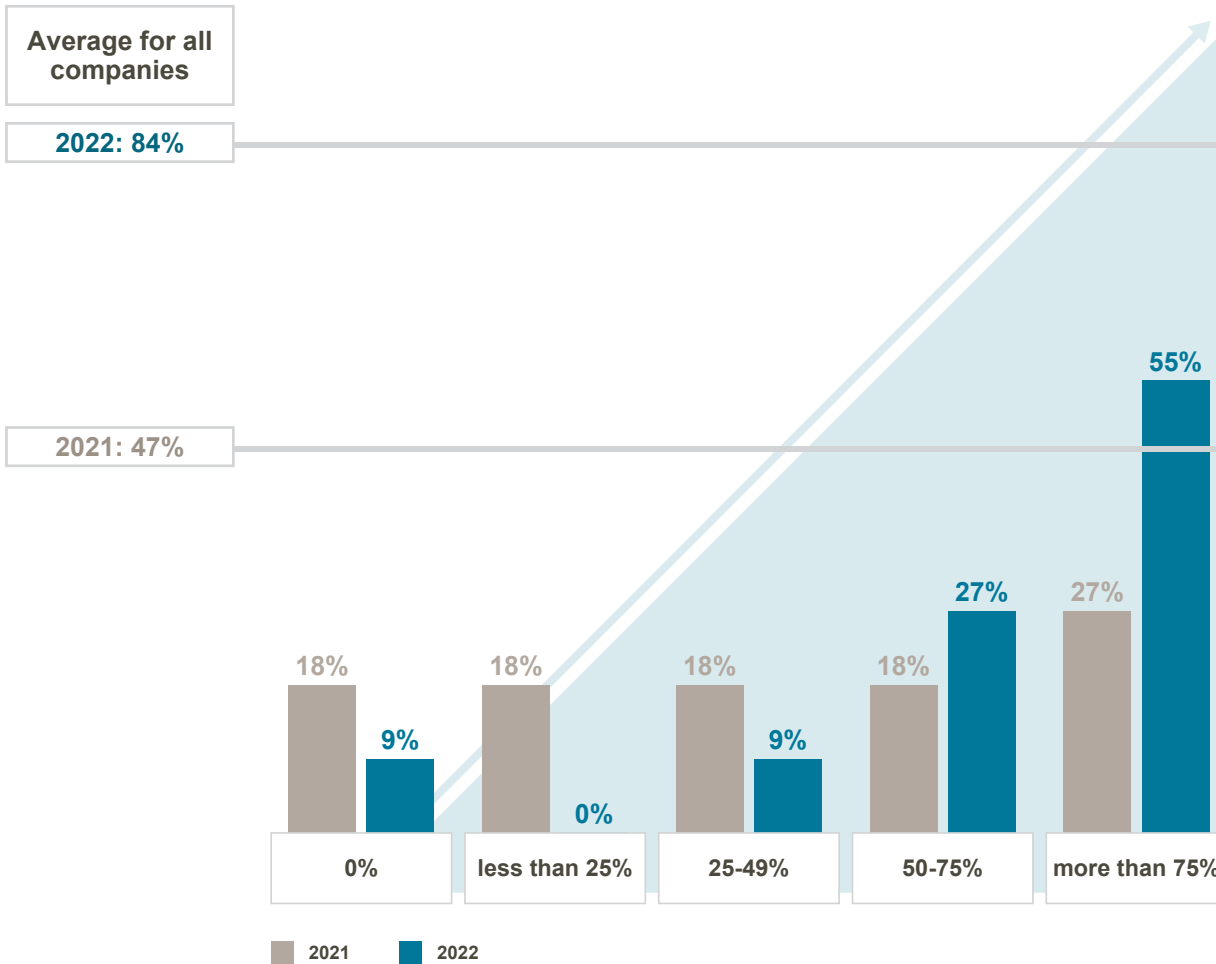


## What do you believe would most help the “bounce back” of exhibitions?

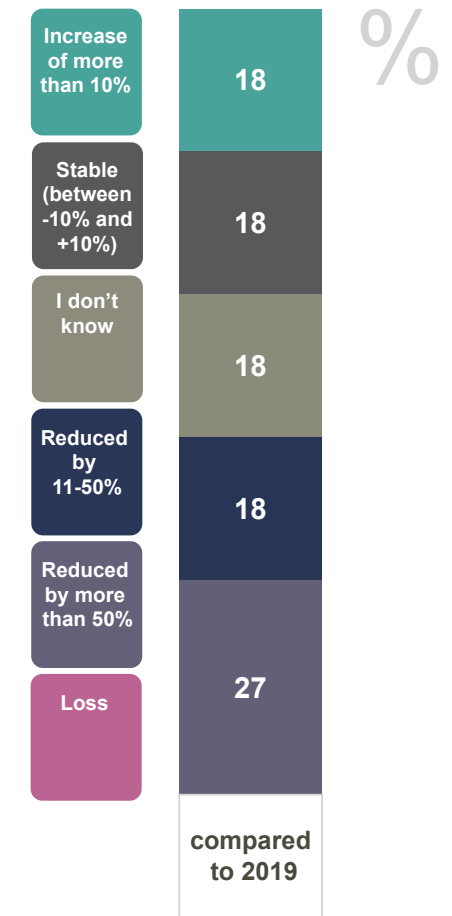




## Revenue compared to 2019



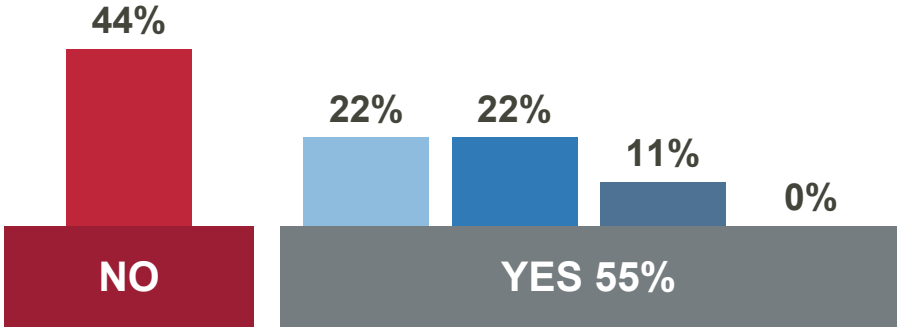
## Operating Profits 2021





## Did your company benefit from public financial support?

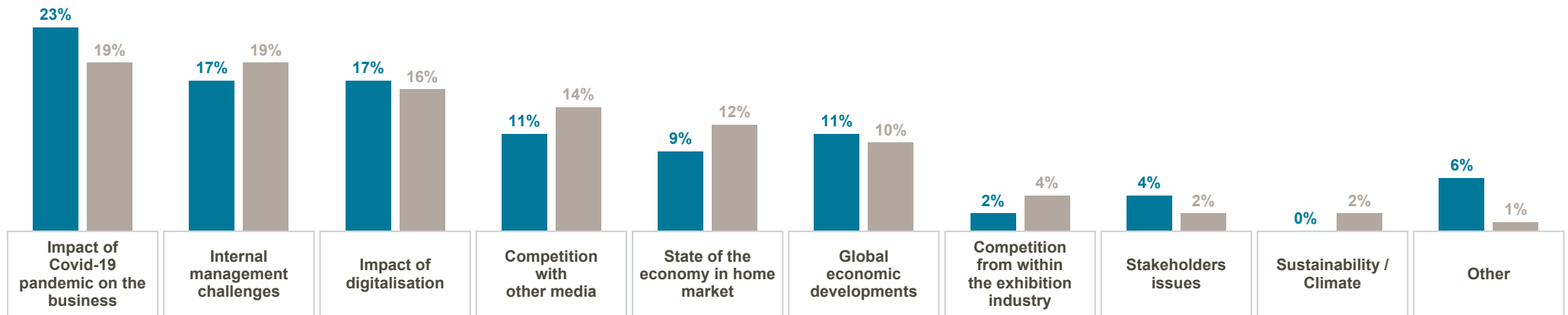
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





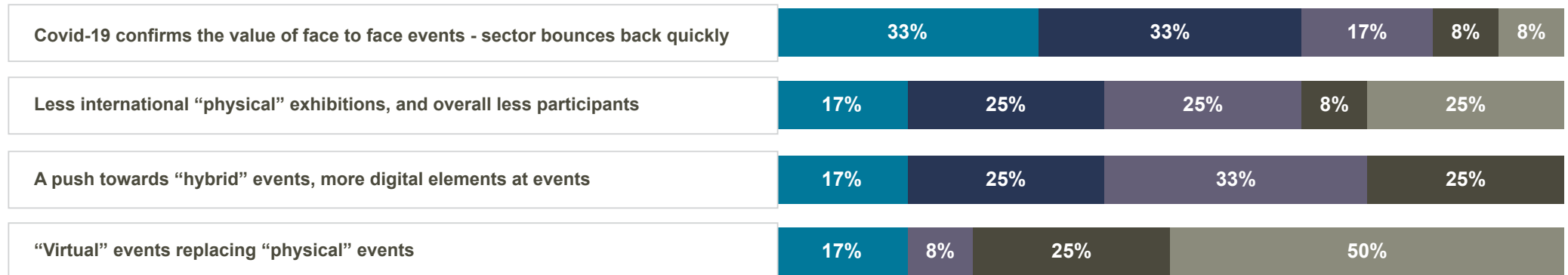
## Most important business issues in the exhibition industry

USA Global



## Format of exhibitions in the coming years

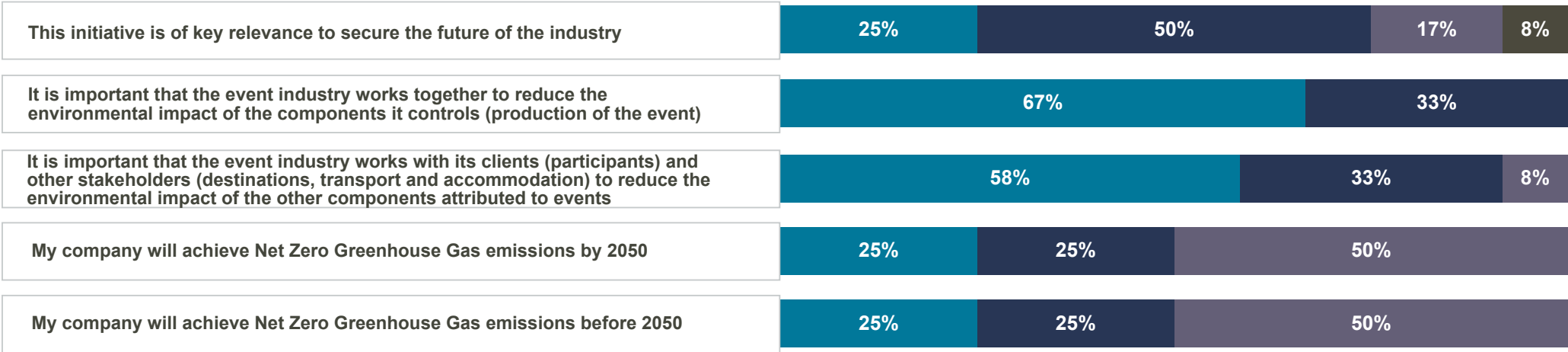
Yes, for sure Most probably Not sure Not sure at all Definitely not





## Climate Change and Net Zero Carbon Events

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





A network diagram consisting of numerous circular nodes connected by thin lines, arranged in a roughly diagonal pattern from the top-left to the bottom-right. The nodes are semi-transparent and have a slight 3D effect. The background is a solid, vibrant red color.

# Central & South America

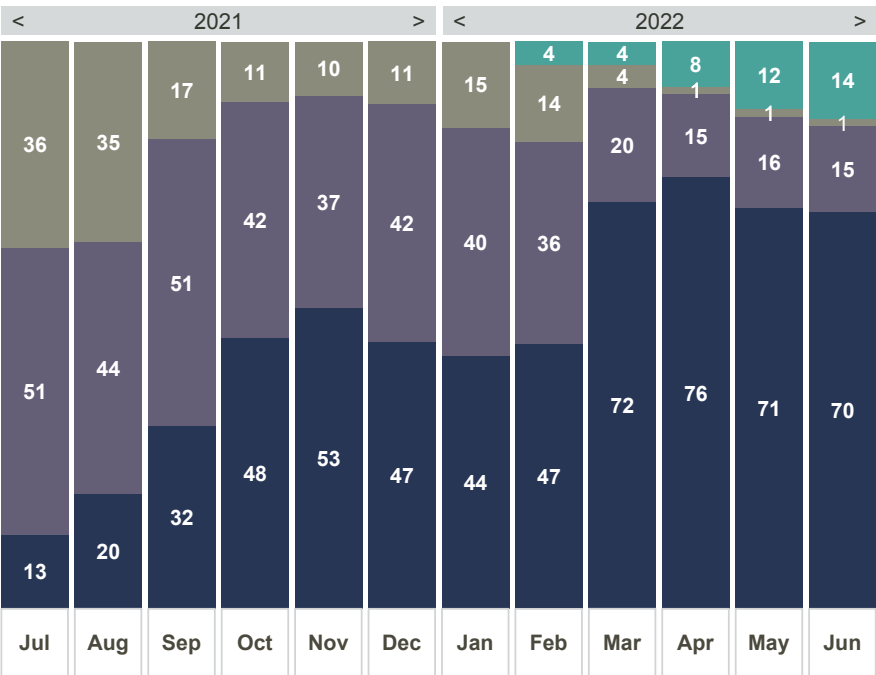
# Operations - Reopening Exhibitions Central & South America



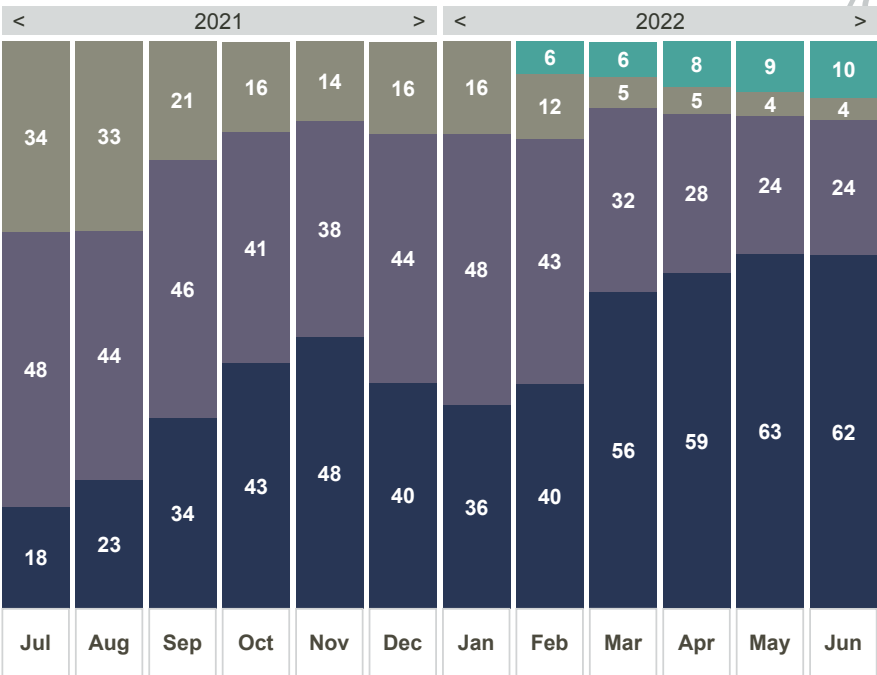
## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



### Central & South America



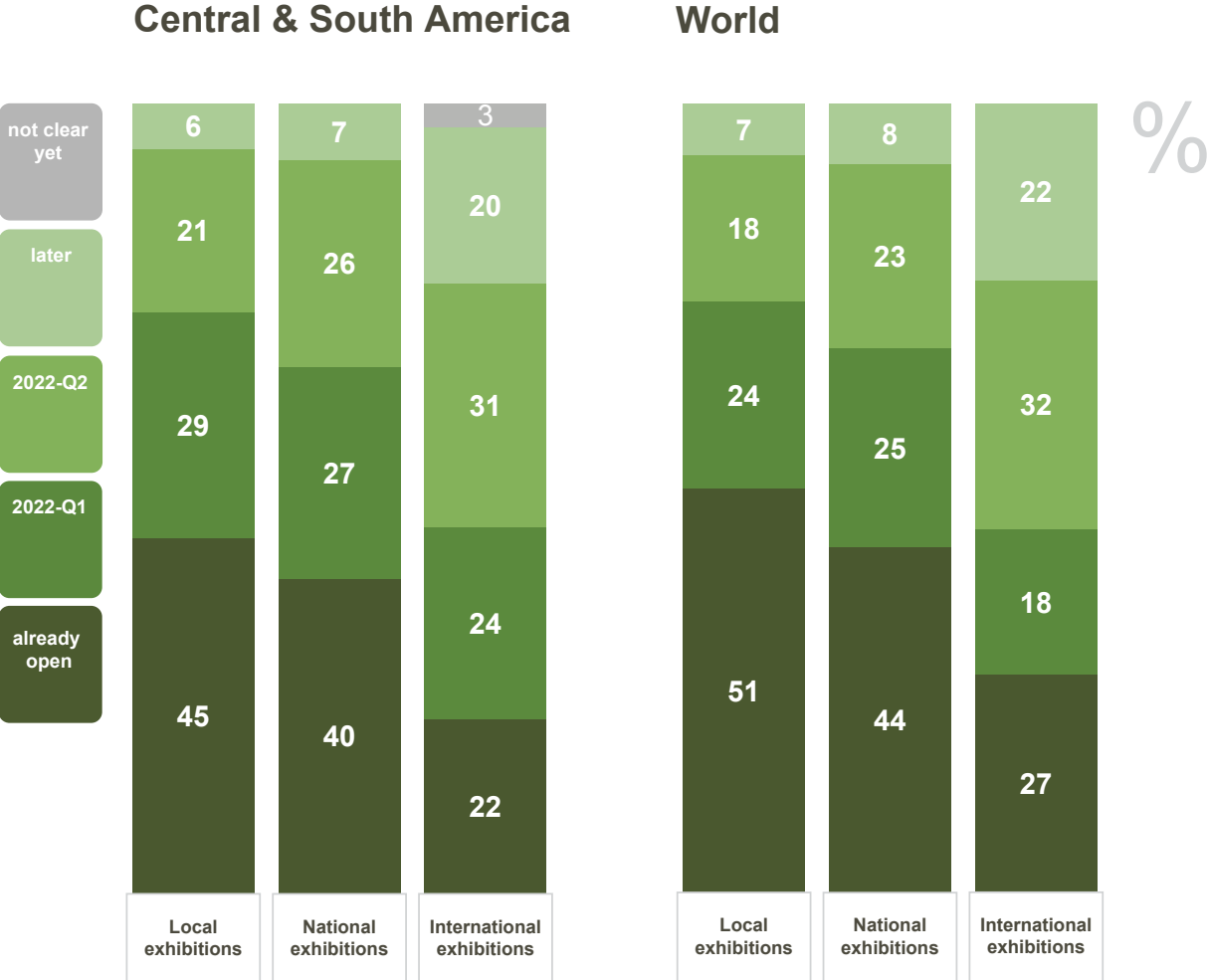
### World



# Operations - Reopening Exhibitions Central & South America



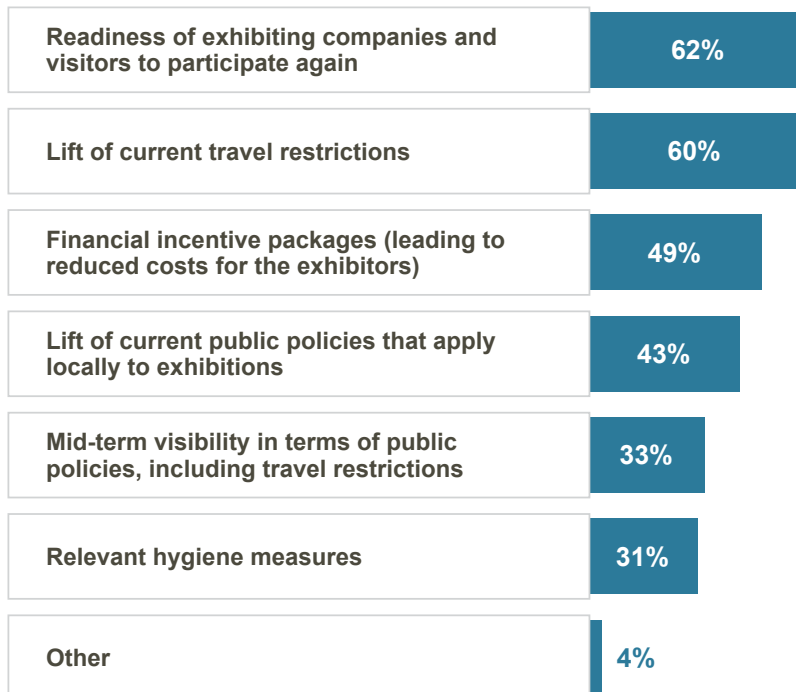
When do you believe exhibitions will open again in your city?



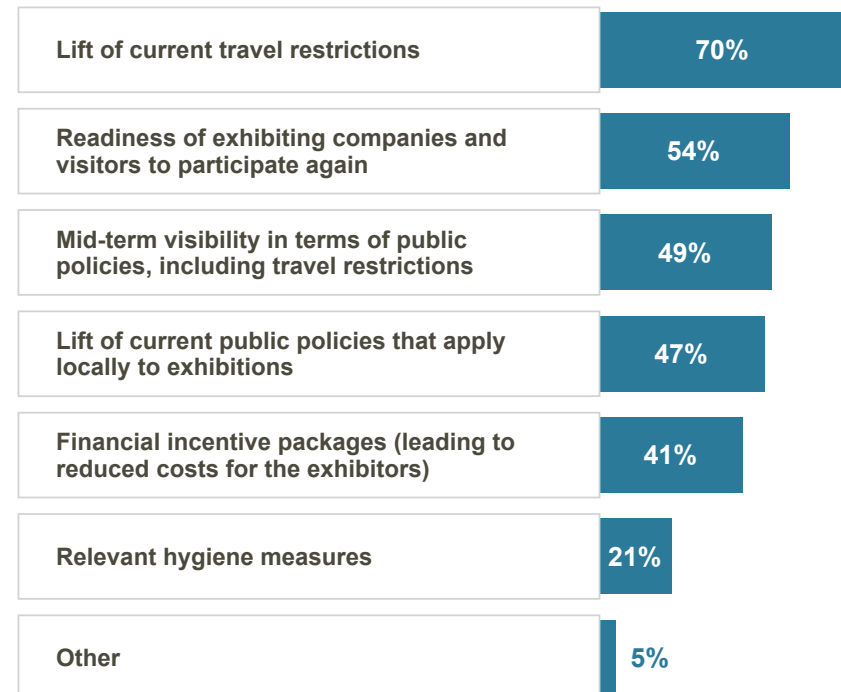


## What do you believe would most help the “bounce back” of exhibitions?

### Central & South America

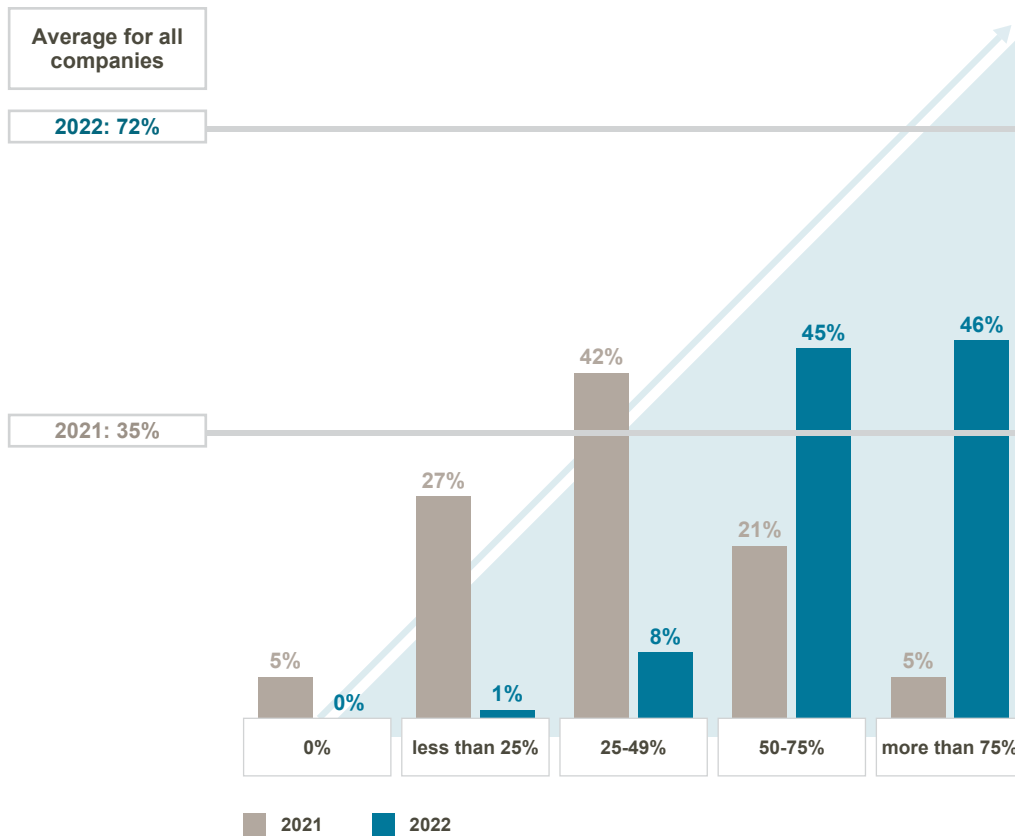


### World

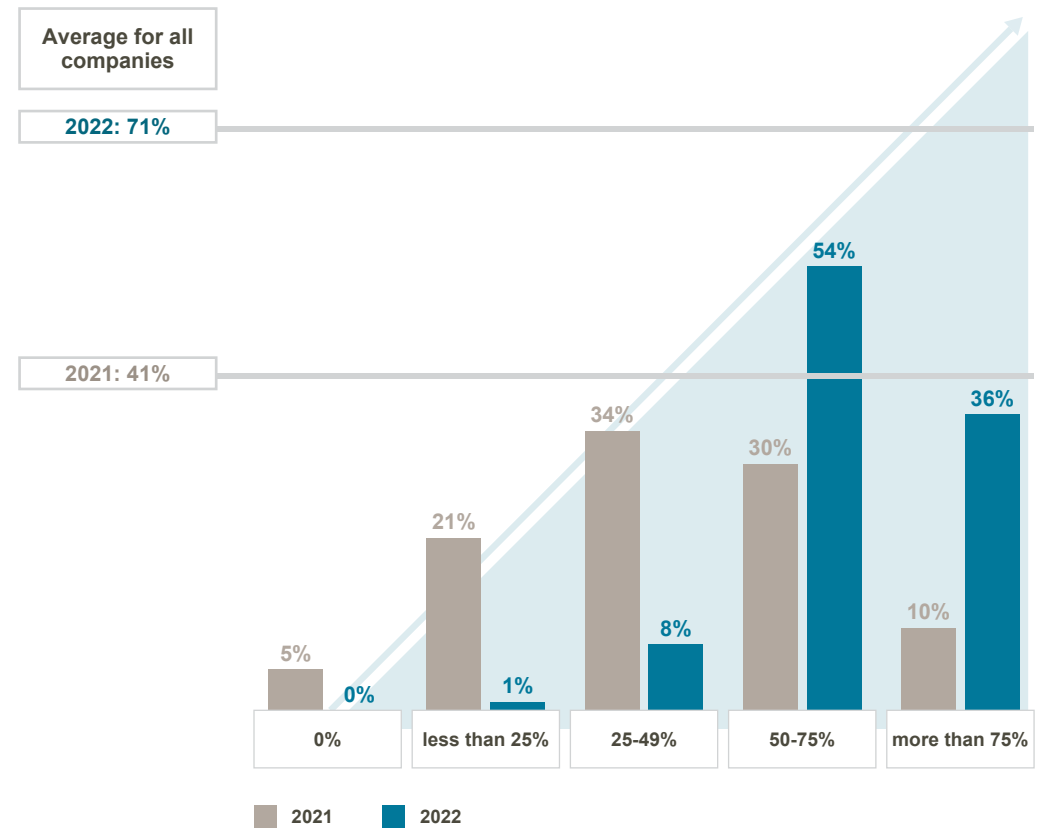


## Revenue compared to 2019

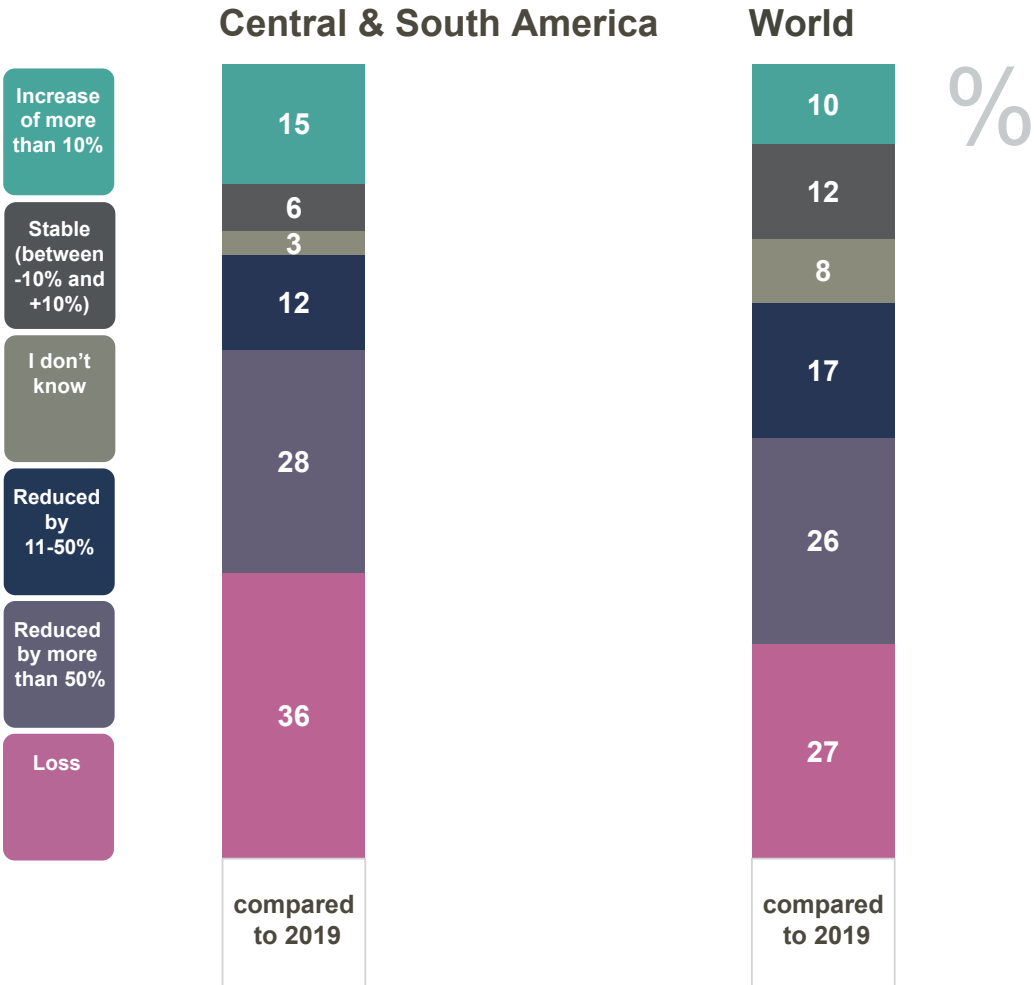
### Central & South America



### World



# Operating profit 2019 Central & South America



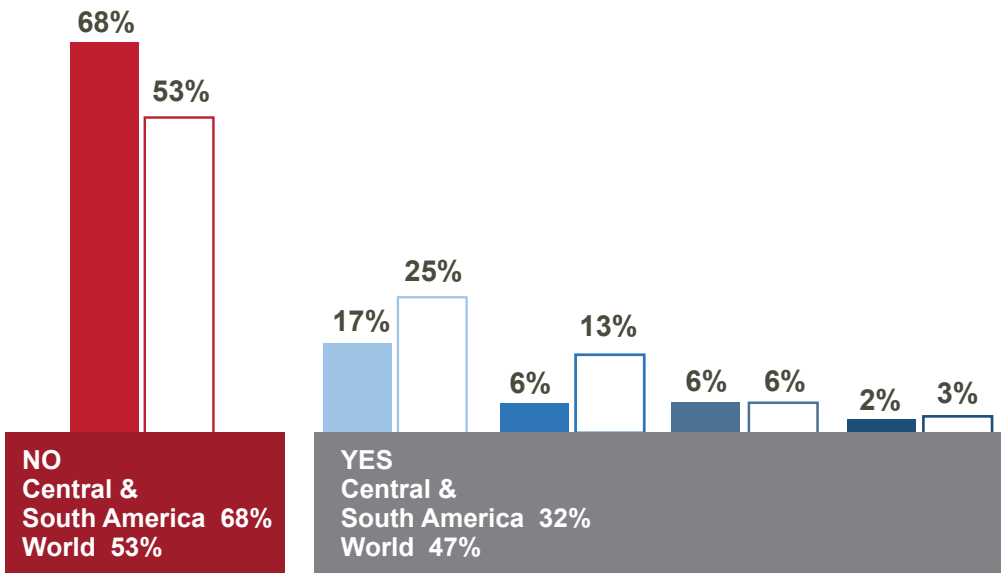
# Public Financial Support Central & South America



## Did your company benefit from public financial support?

**Central & South America**    World

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

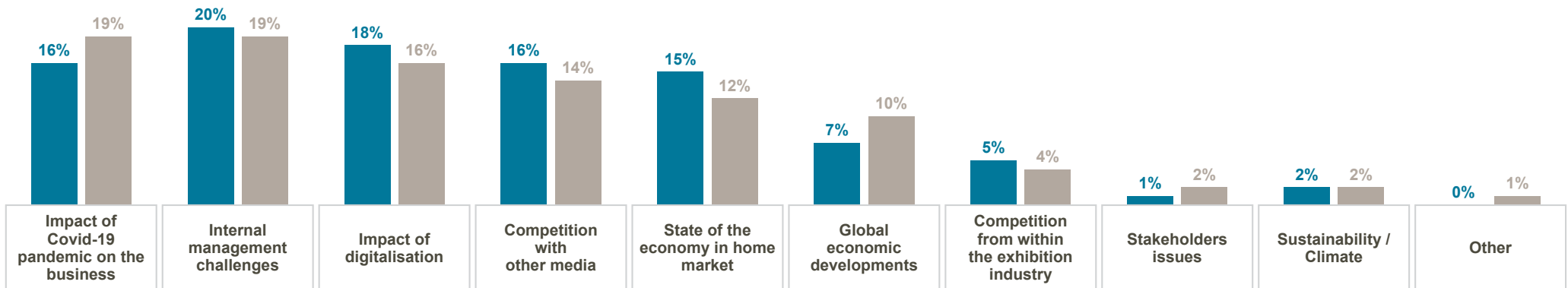


# Most Important Business Issues - Format of Exhibitions - Central & South America



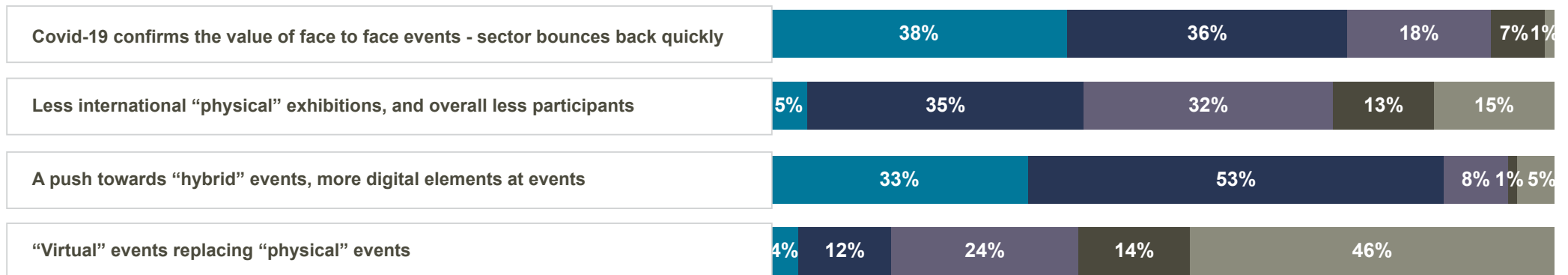
## Most important business issues in the exhibition industry

Central & South America Global



## Format of exhibitions in the coming years

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

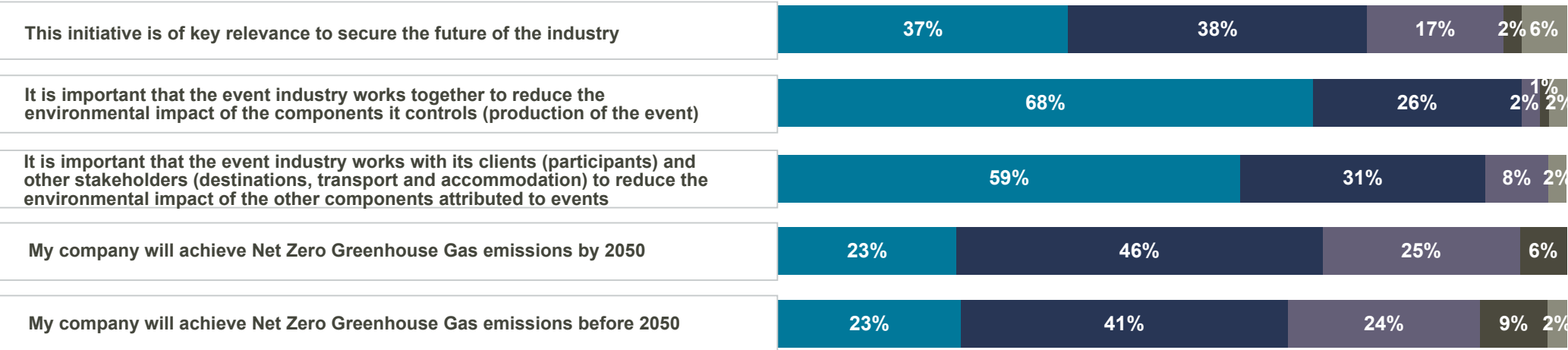




# Climate Change and Net Zero Carbon Events Central & South America

## Climate Change and Net Zero Carbon Events

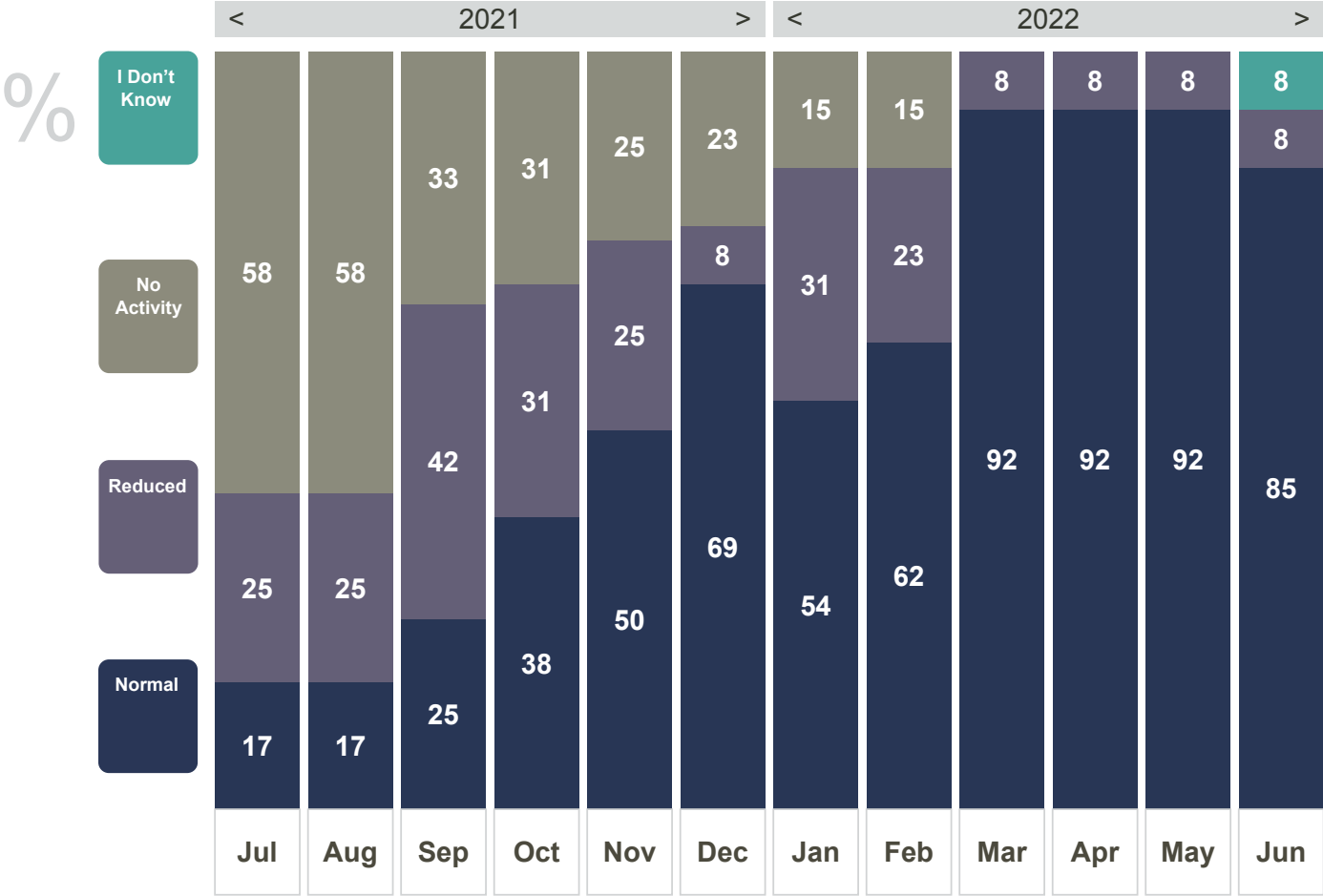
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not



# Detailed results for Argentina

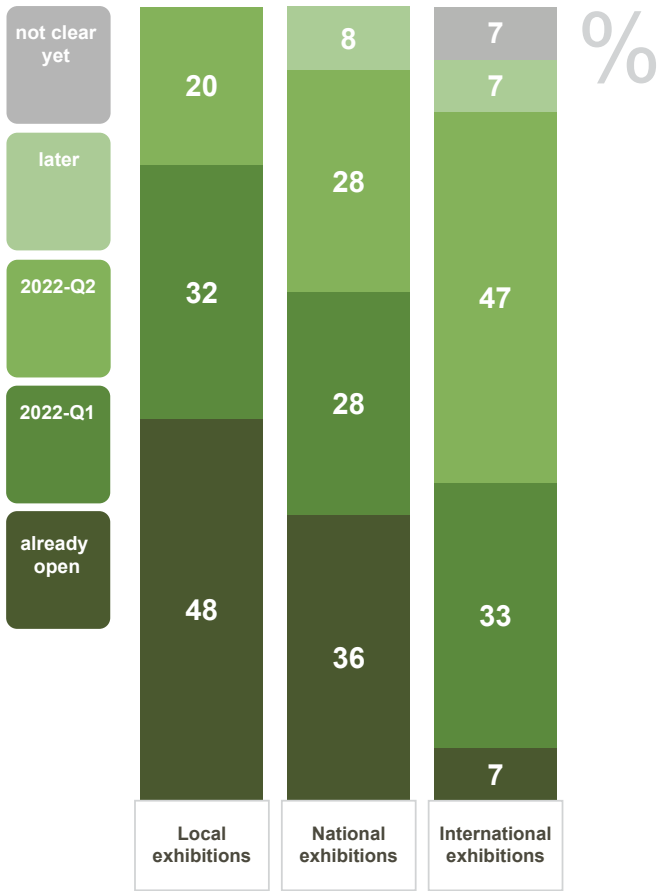


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

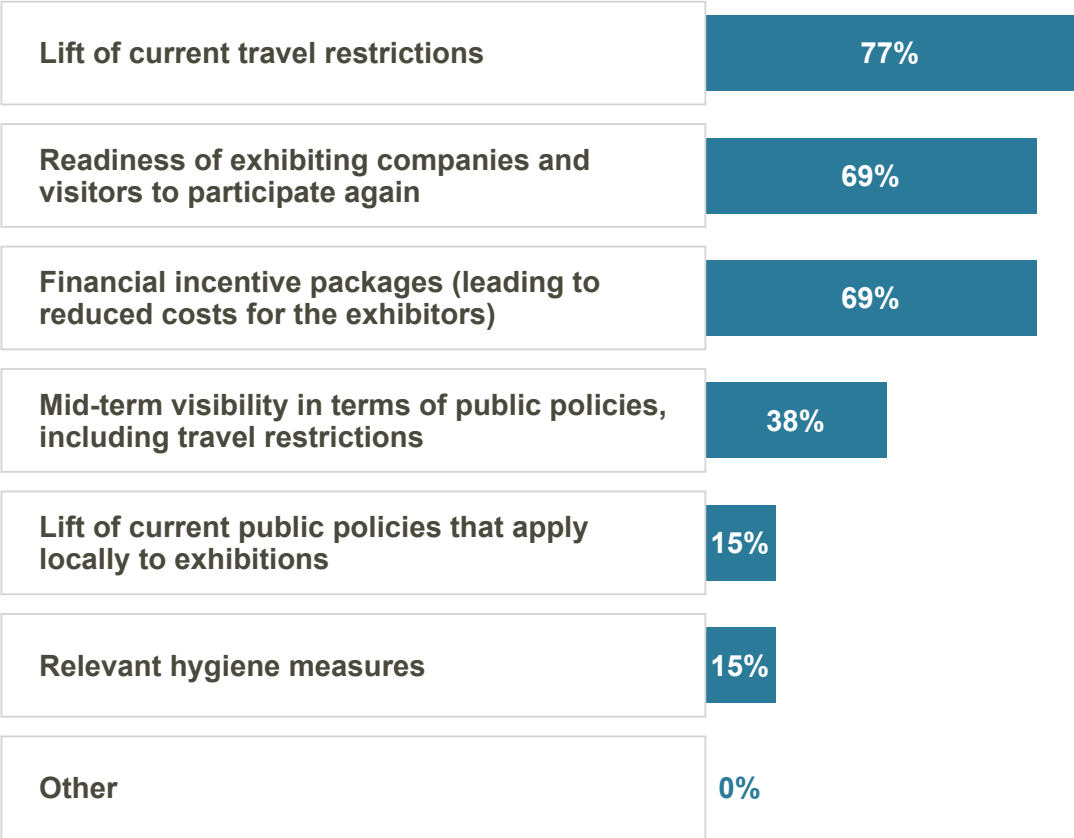




## When do you believe exhibitions will open again in your city?

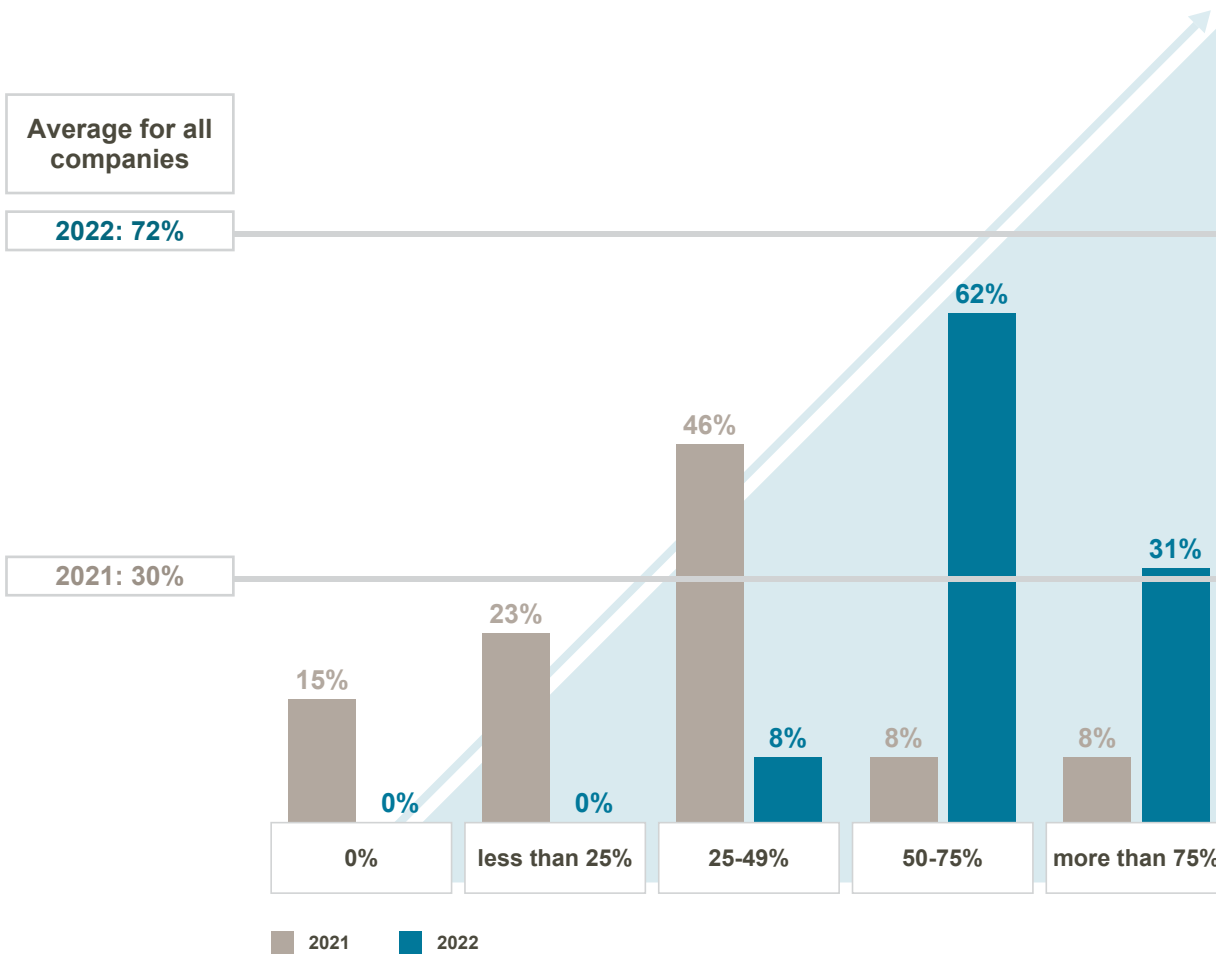


## What do you believe would most help the “bounce back” of exhibitions?

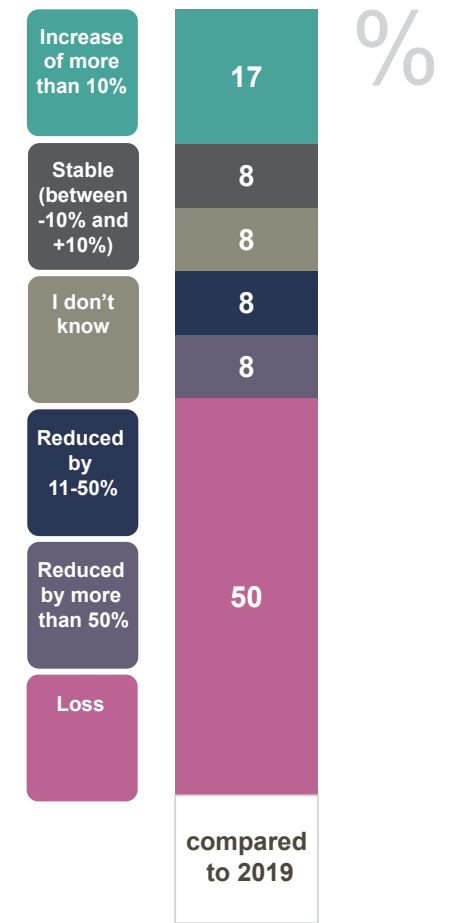




## Revenue compared to 2019



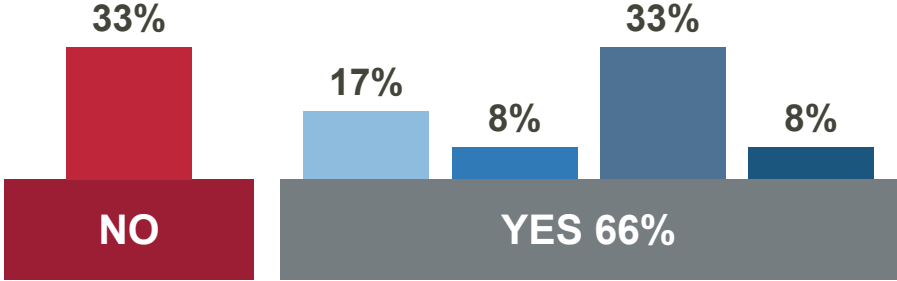
## Operating Profits 2021





## Did your company benefit from public financial support?

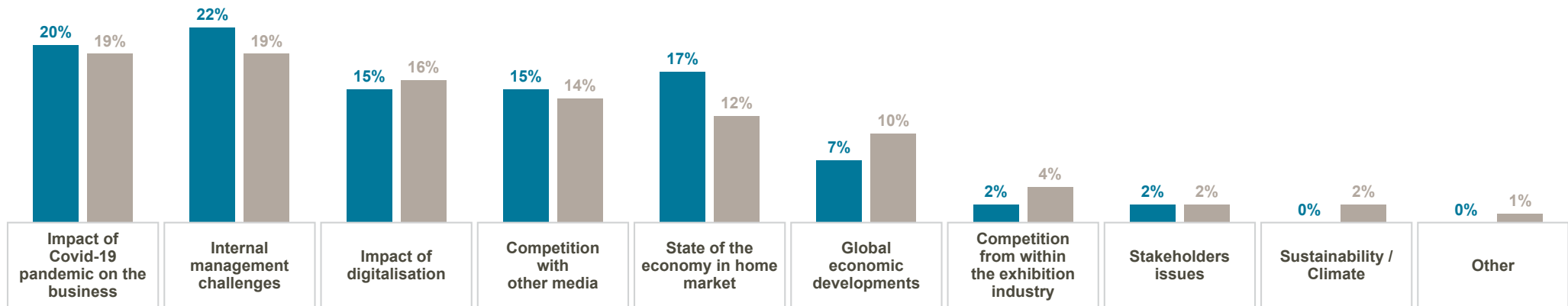
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





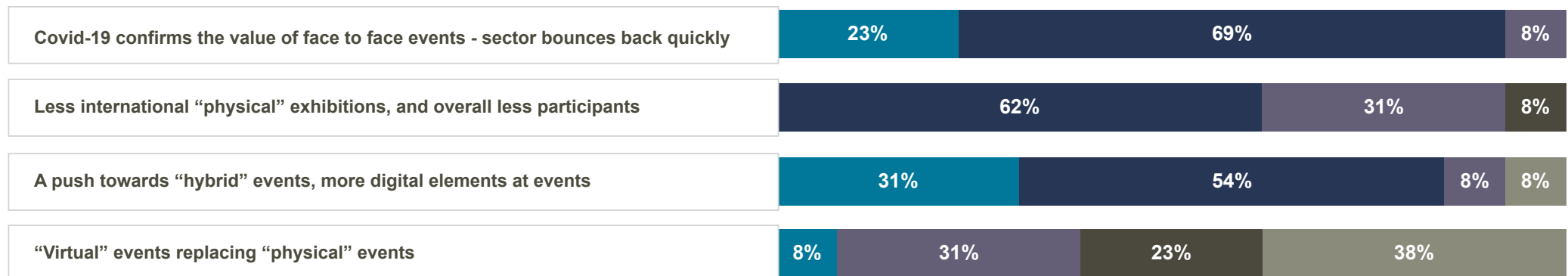
## Most important business issues in the exhibition industry

Argentina Global



## Format of exhibitions in the coming years

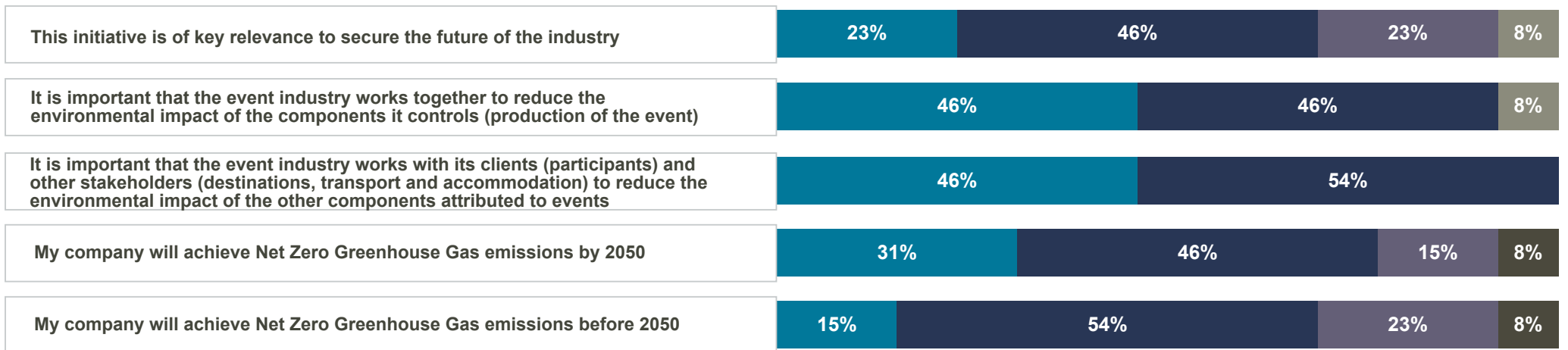
Yes, for sure Most probably Not sure Not sure at all Definitely not





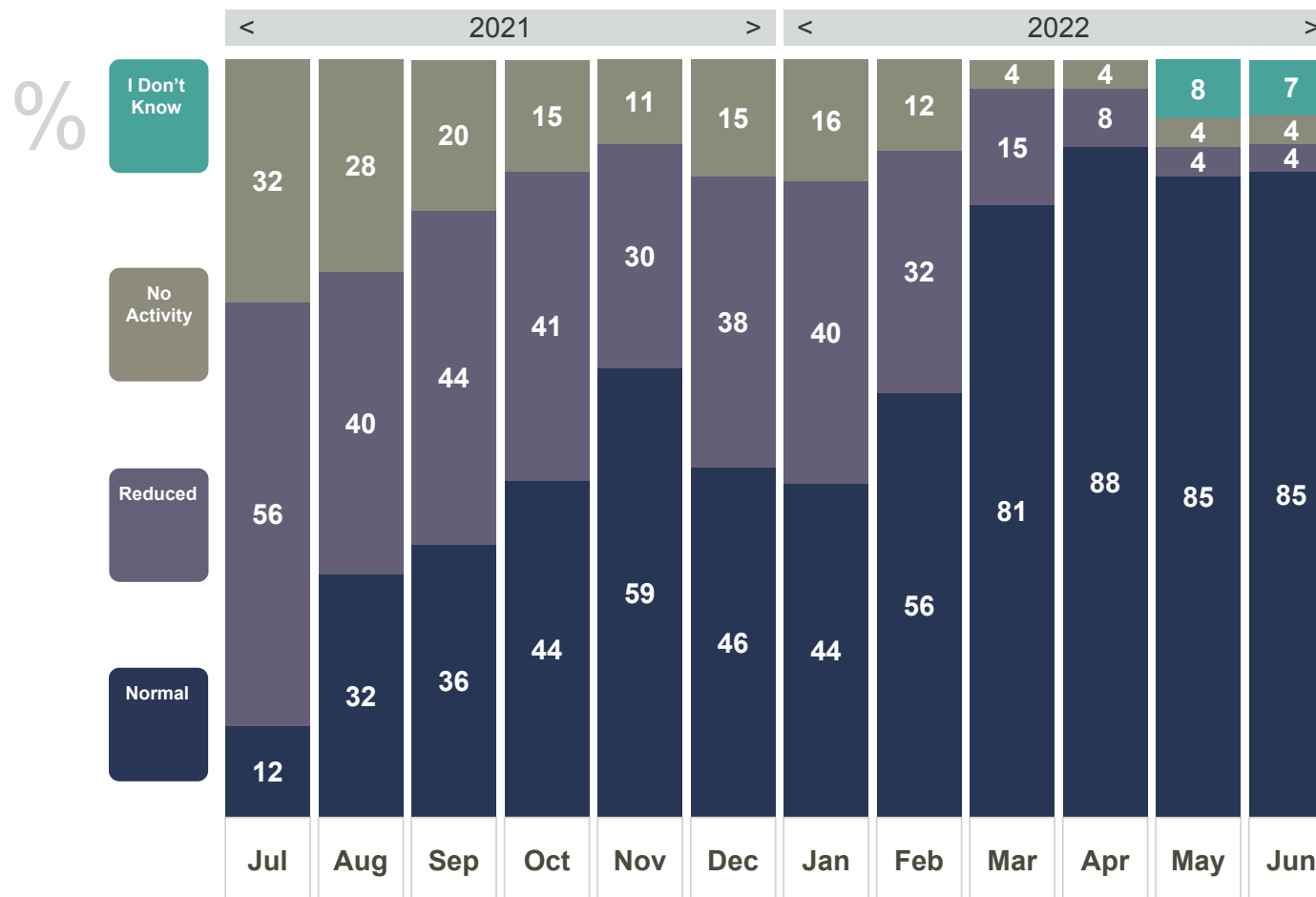
## Climate Change and Net Zero Carbon Events

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





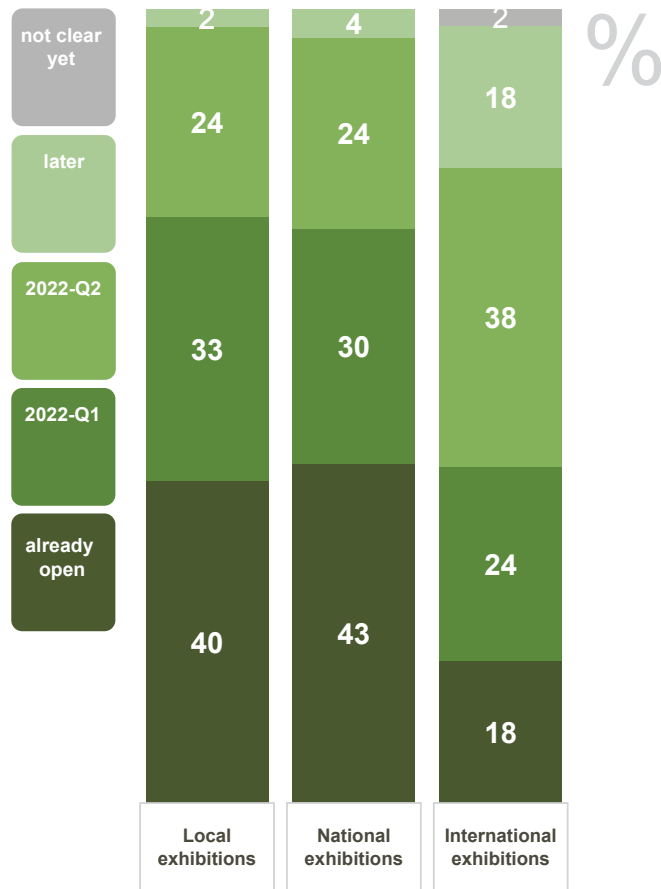
## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



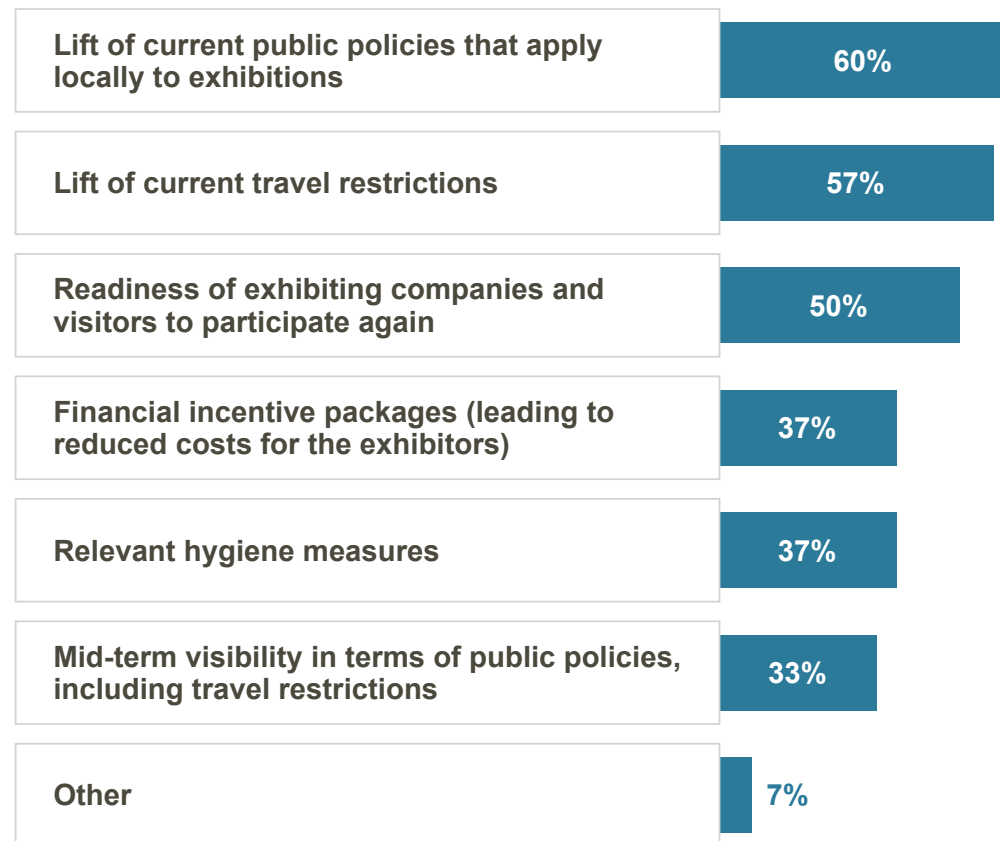




## When do you believe exhibitions will open again in your city?



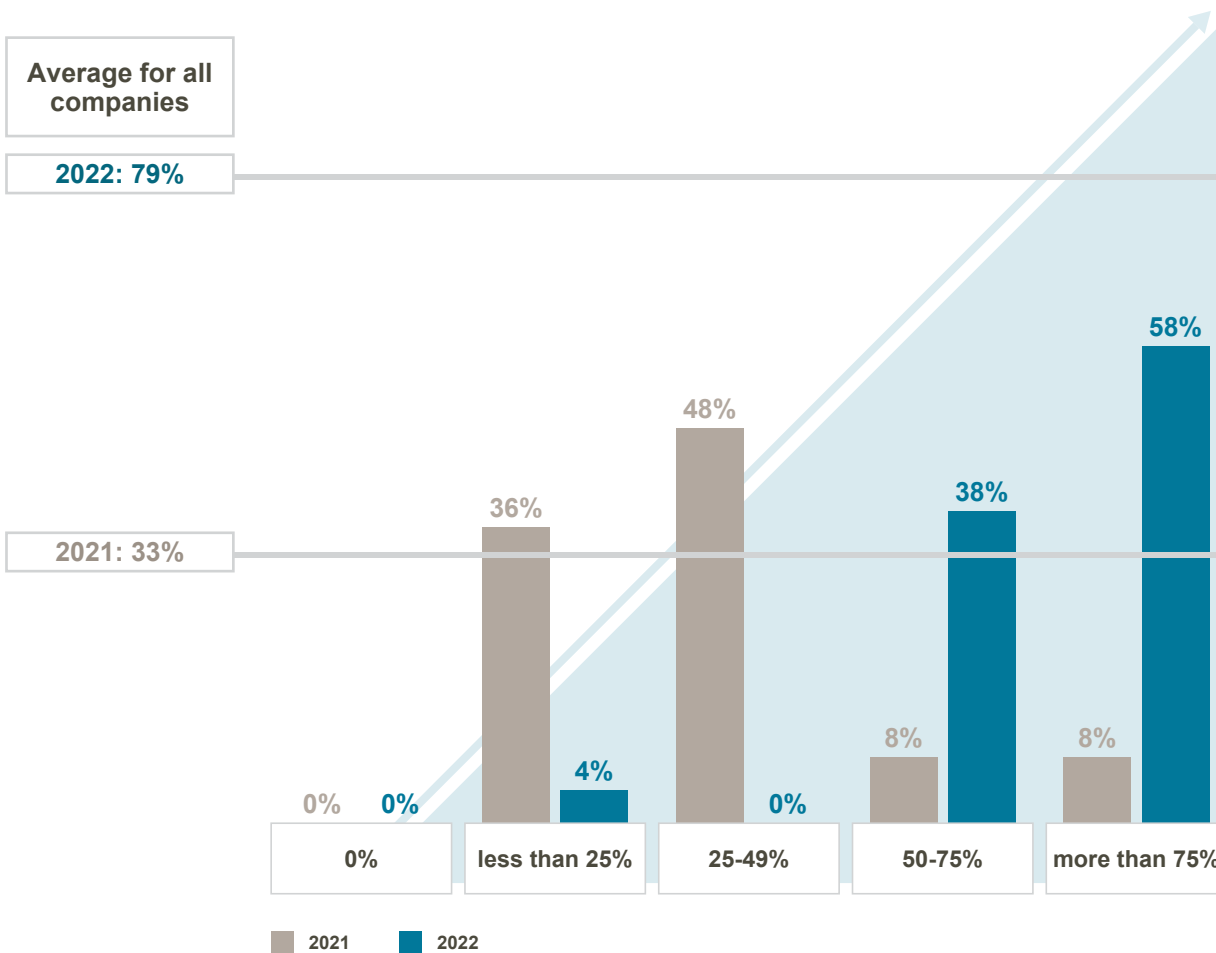
## What do you believe would most help the “bounce back” of exhibitions?



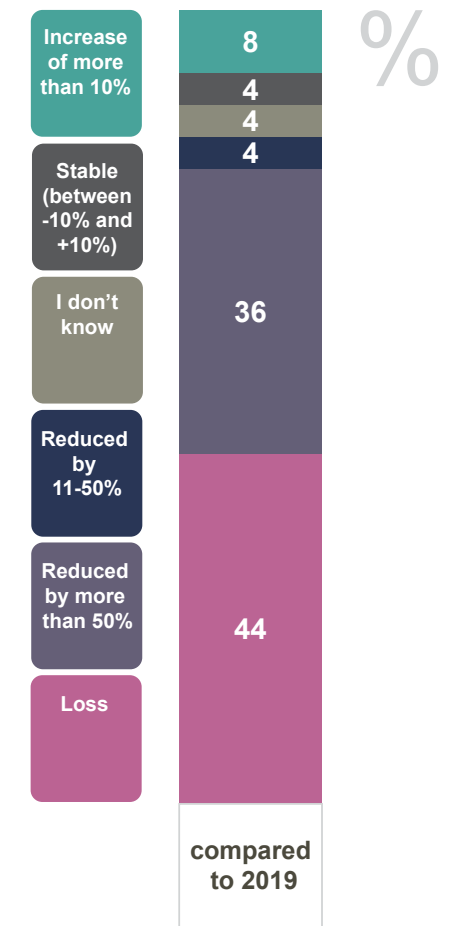
# Detailed results for Brazil



## Revenue compared to 2019



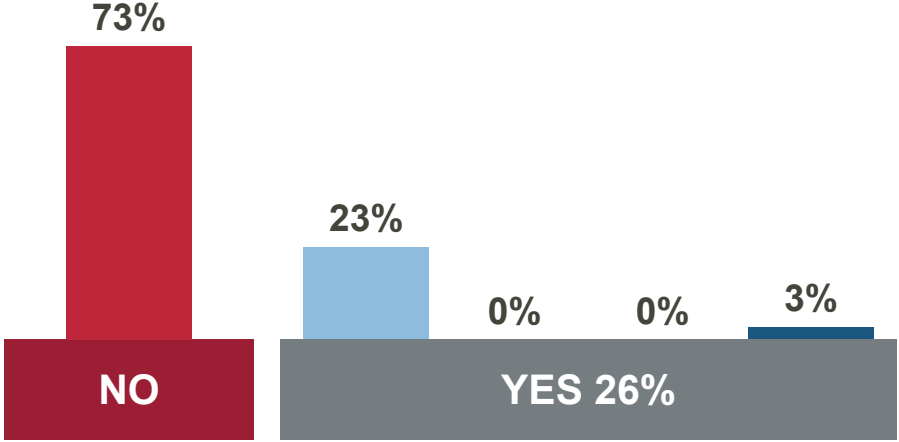
## Operating Profits 2021





## Did your company benefit from public financial support?

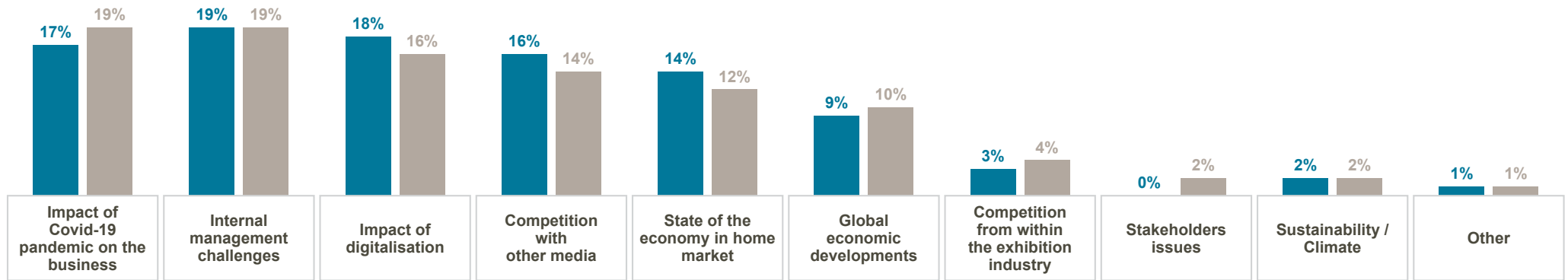
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





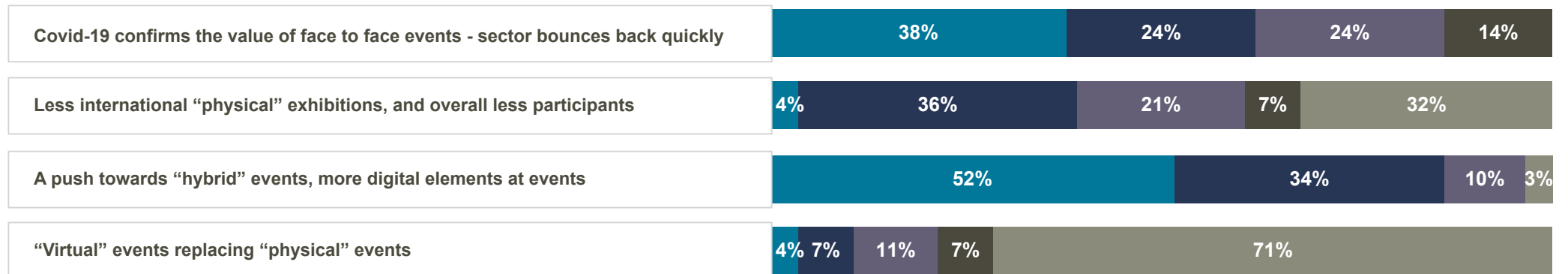
## Most important business issues in the exhibition industry

**Brazil** Global



## Format of exhibitions in the coming years

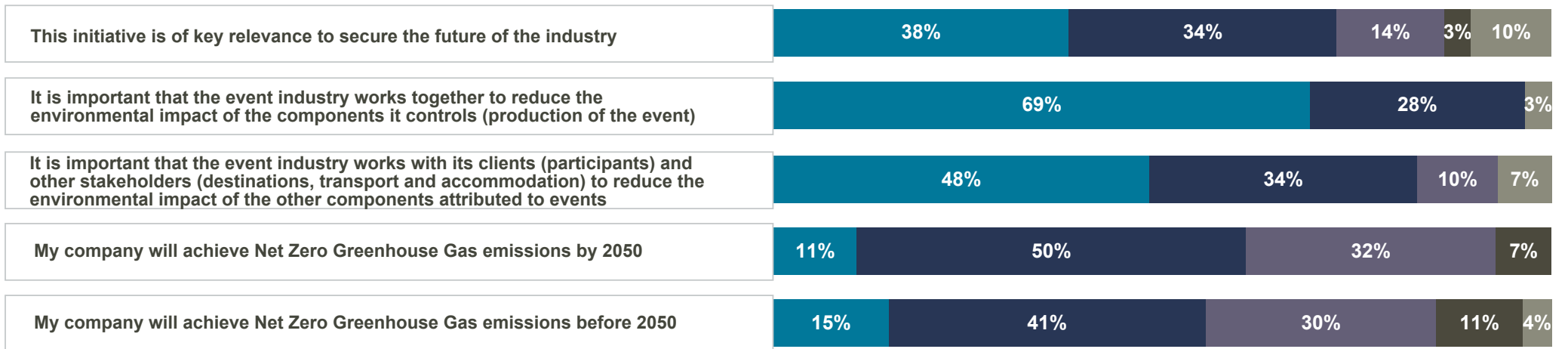
Yes, for sure Most probably Not sure Not sure at all Definitely not





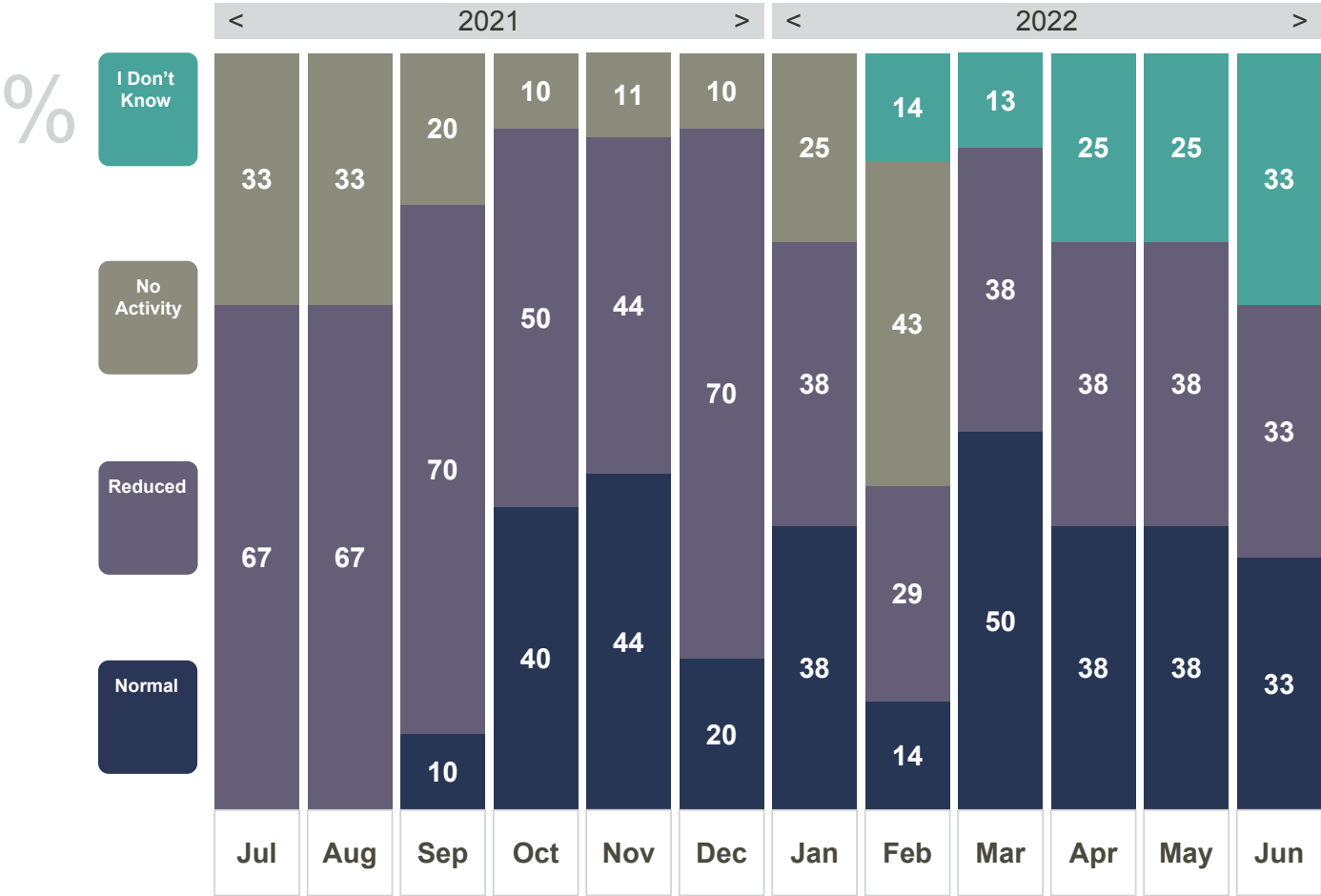
## Climate Change and Net Zero Carbon Events

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



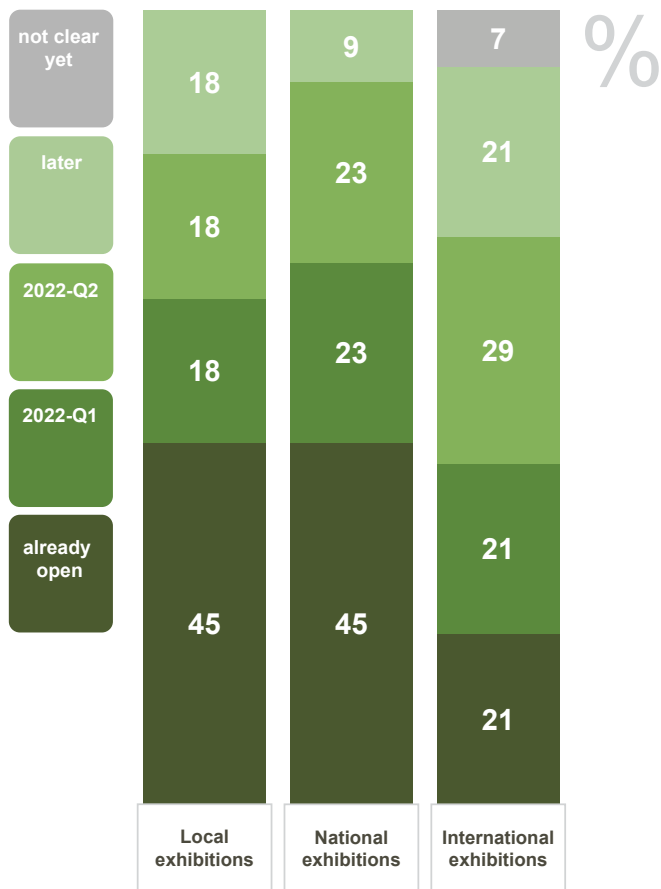


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

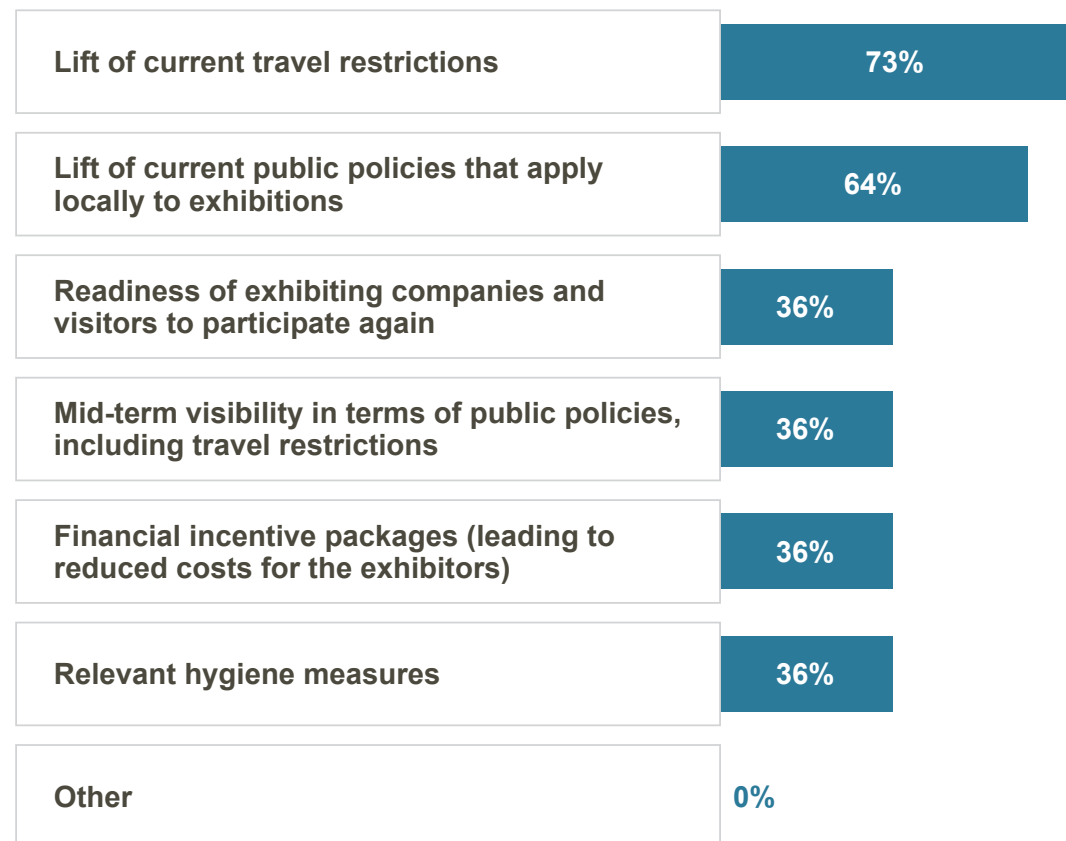




## When do you believe exhibitions will open again in your city?



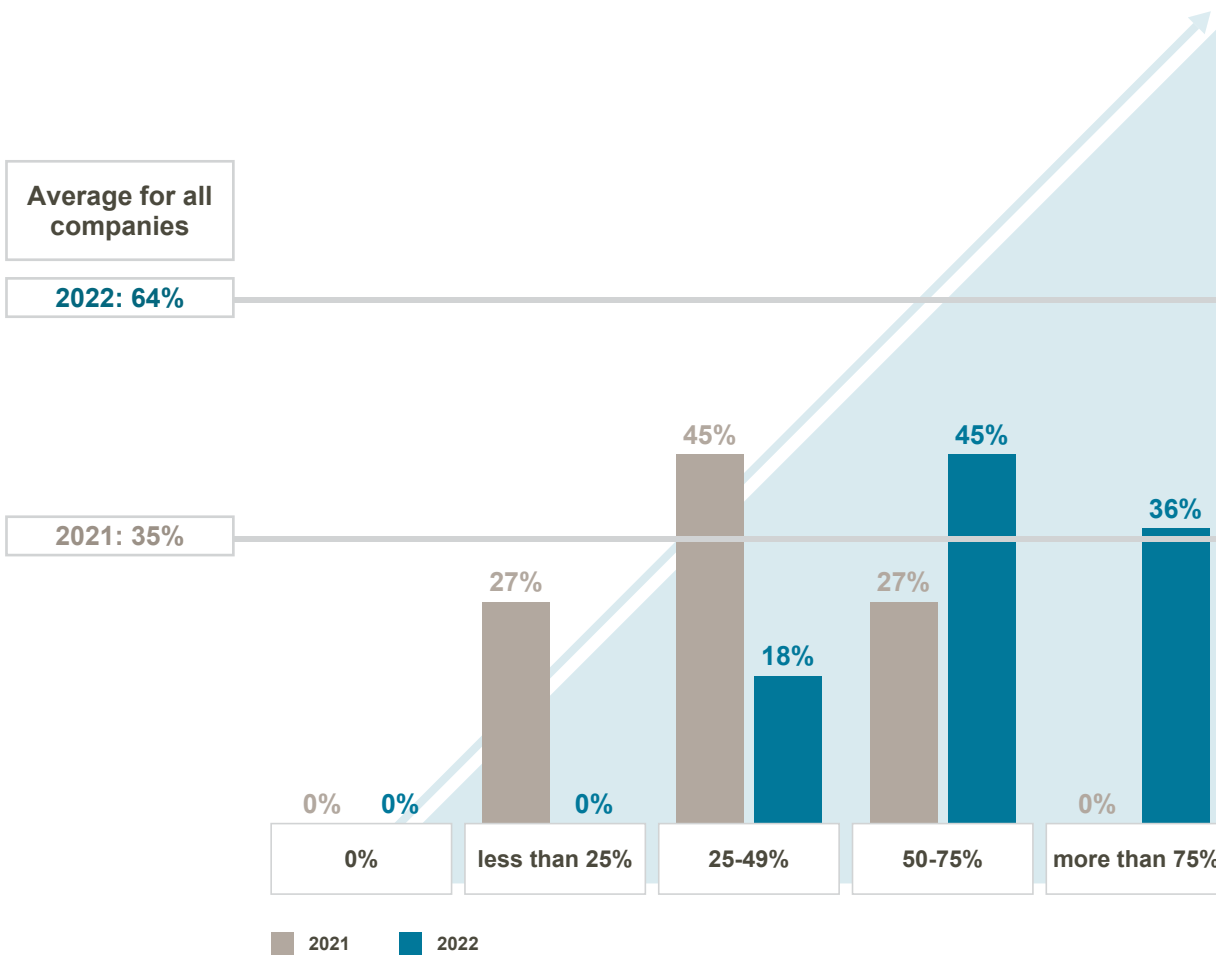
## What do you believe would most help the “bounce back” of exhibitions?



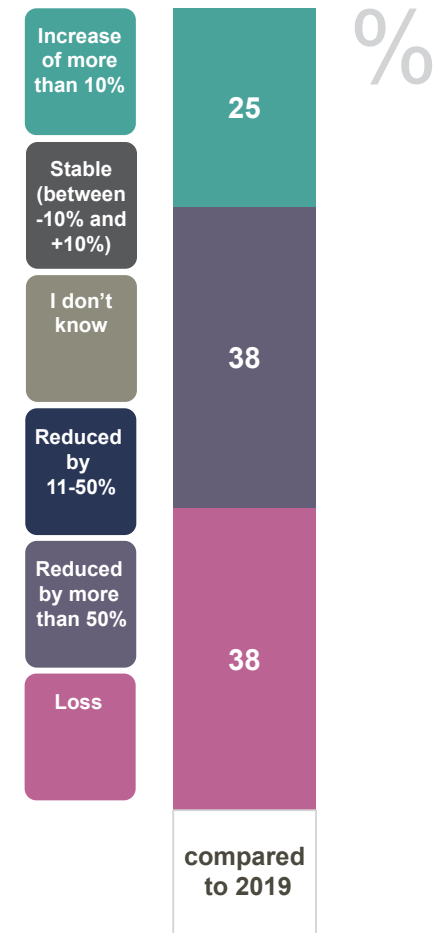
# Detailed results for Chile



## Revenue compared to 2019



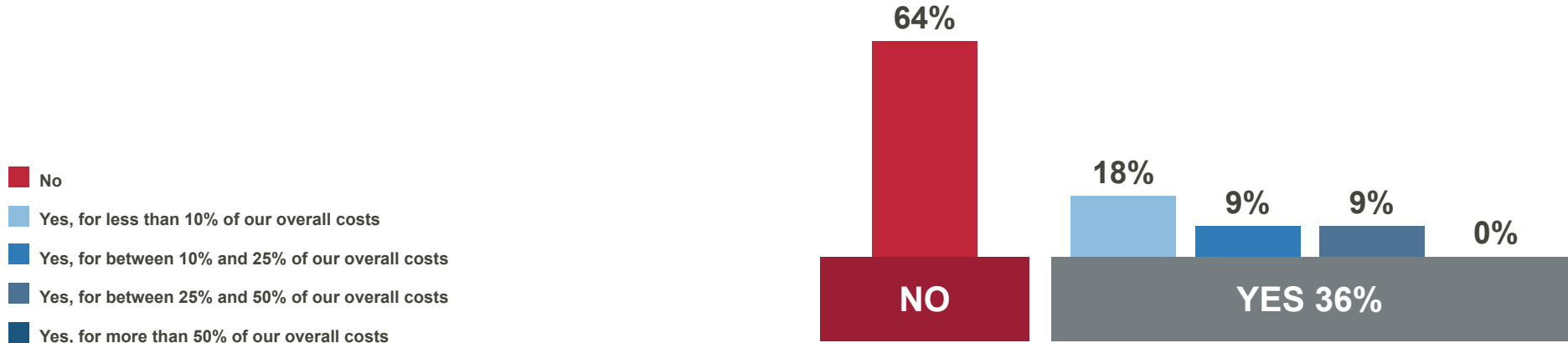
## Operating Profits 2021







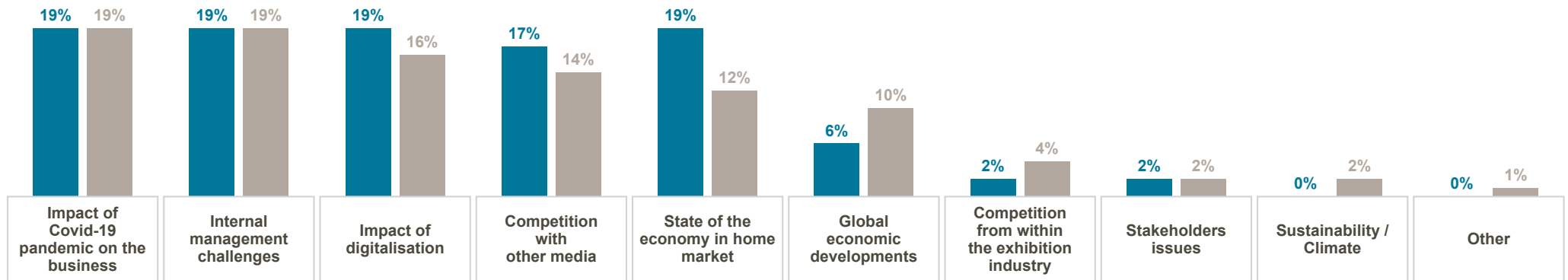
## Did your company benefit from public financial support?





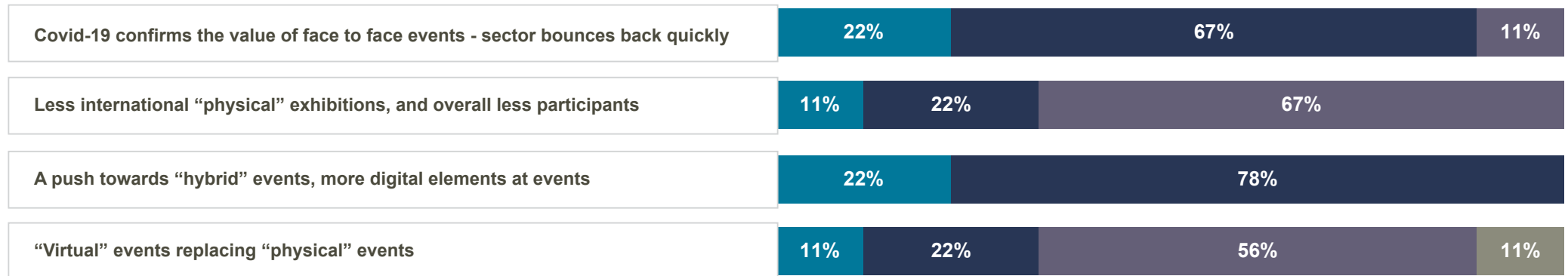
## Most important business issues in the exhibition industry

Chile Global



## Format of exhibitions in the coming years

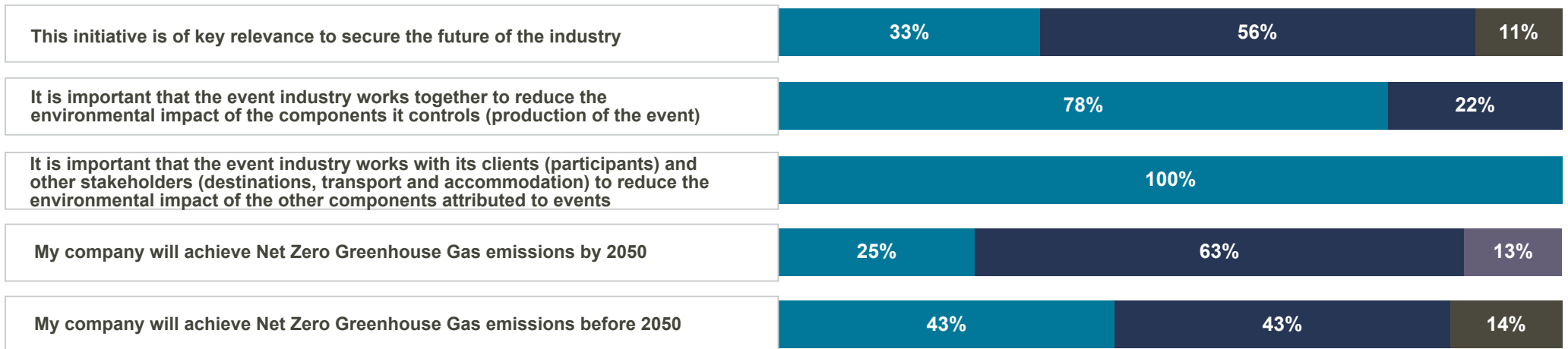
Yes, for sure Most probably Not sure Not sure at all Definitely not





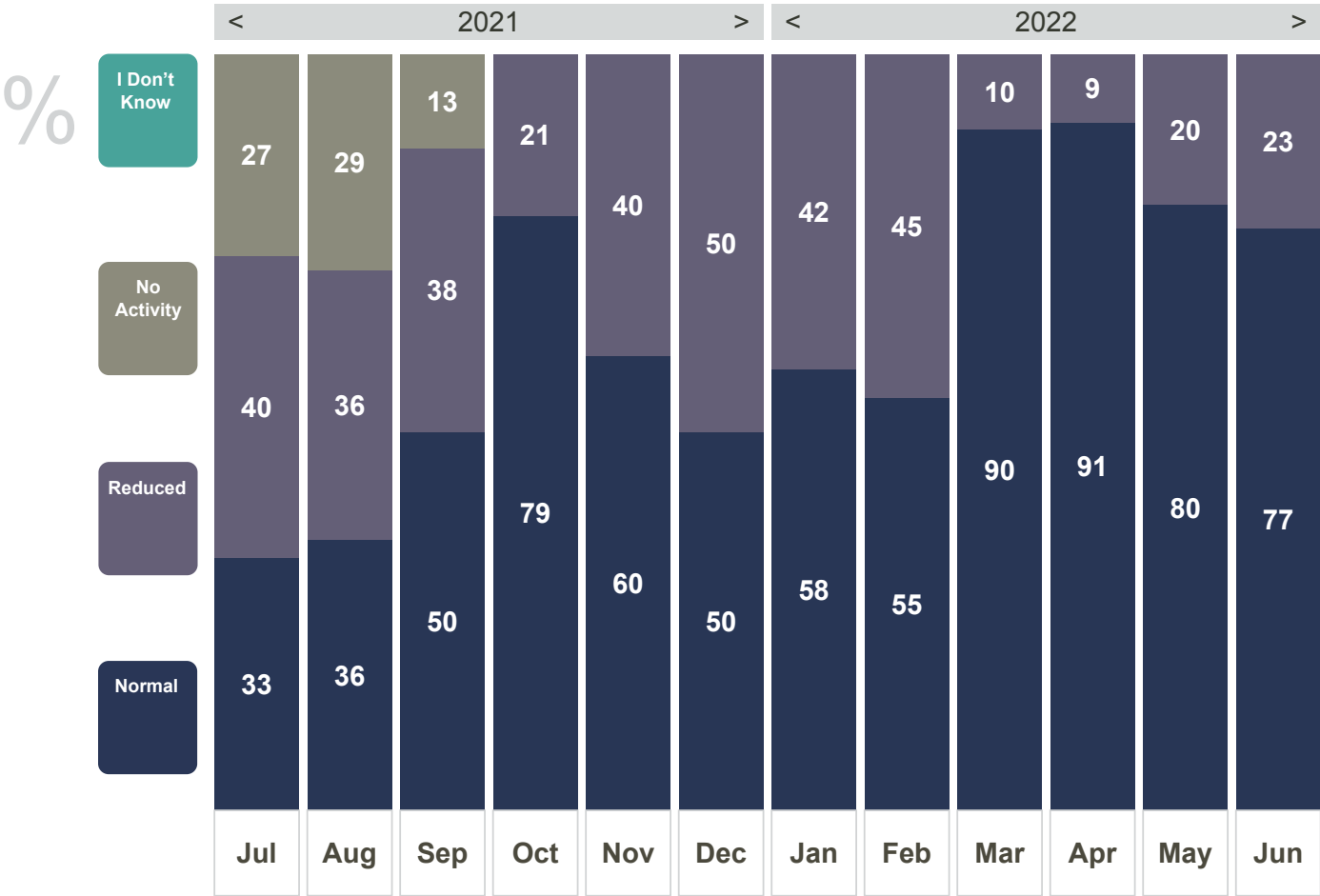
## Climate Change and Net Zero Carbon Events

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



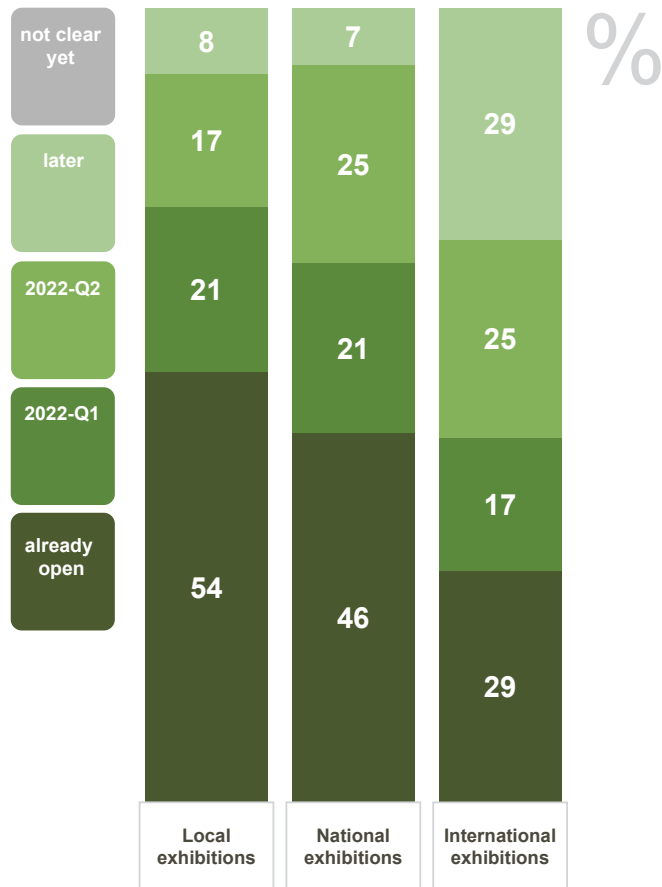


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

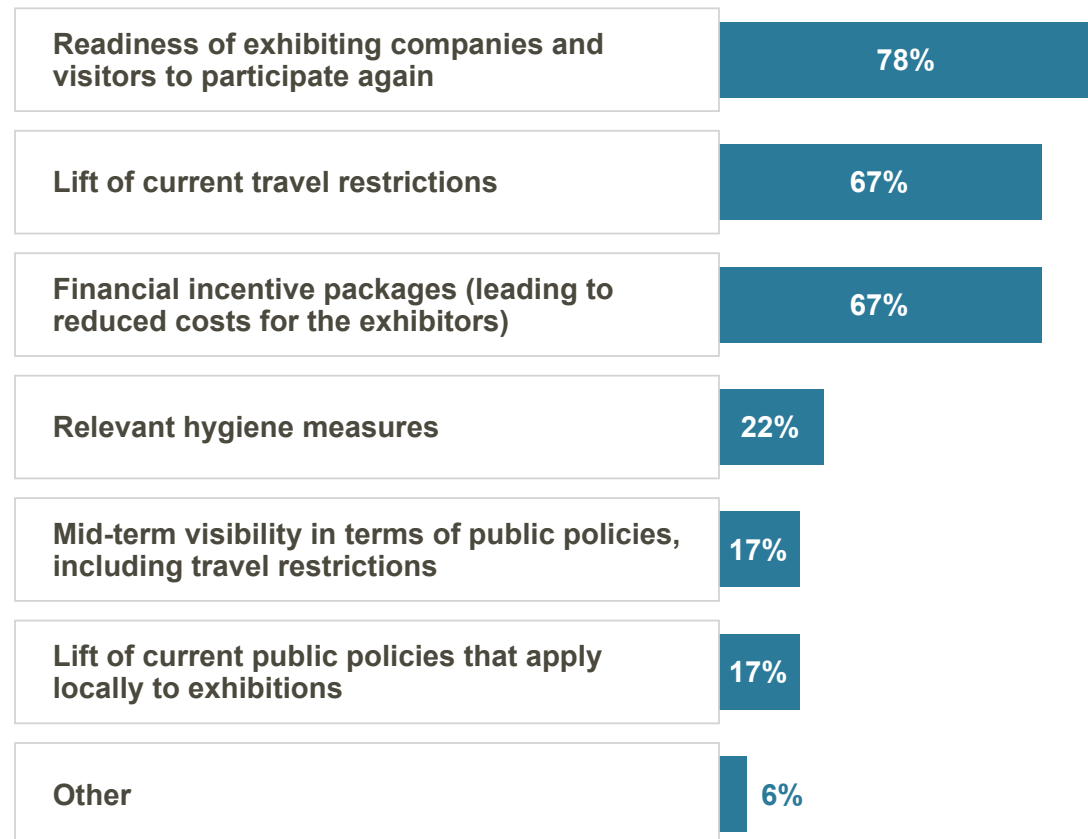




## When do you believe exhibitions will open again in your city?



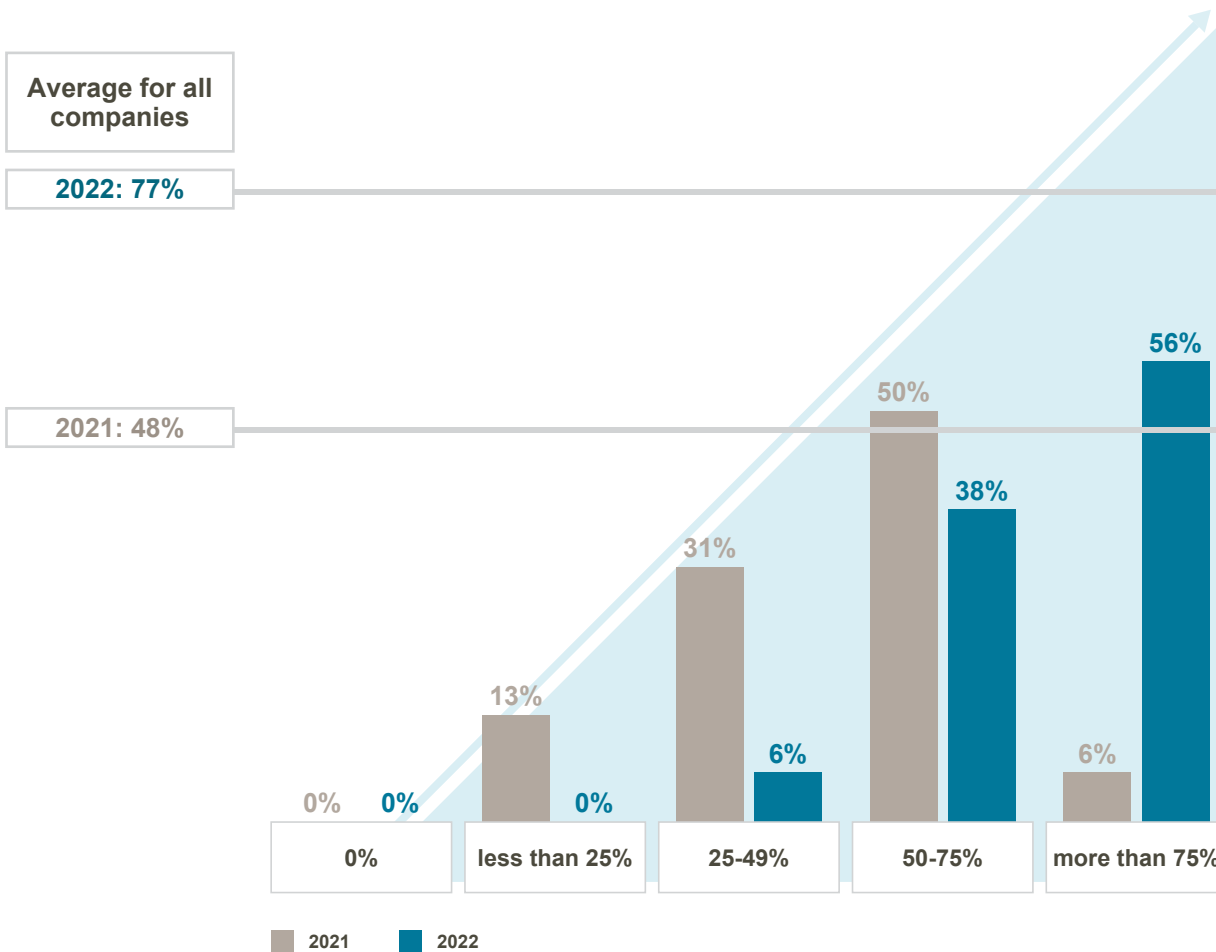
## What do you believe would most help the “bounce back” of exhibitions?



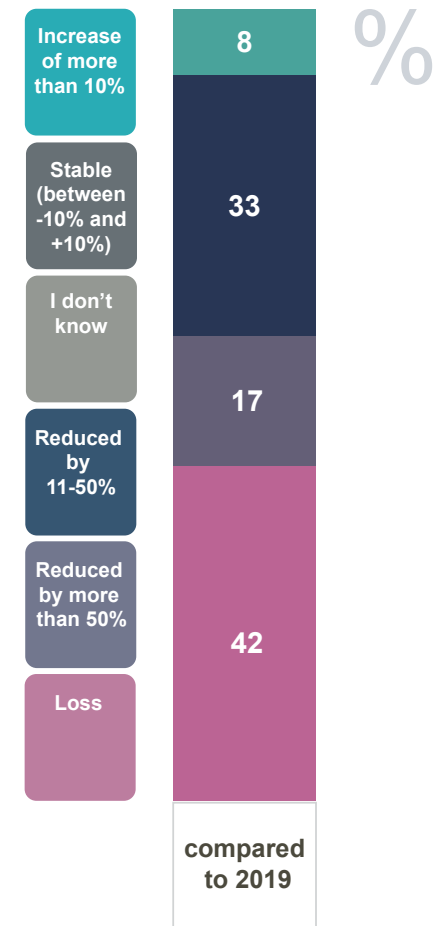
# Detailed results for Colombia



## Revenue compared to 2019



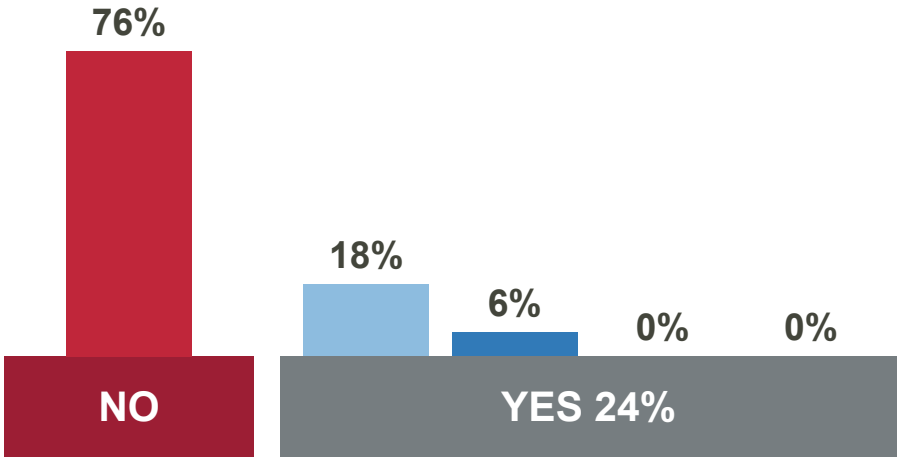
## Operating Profits 2021





## Did your company benefit from public financial support?

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



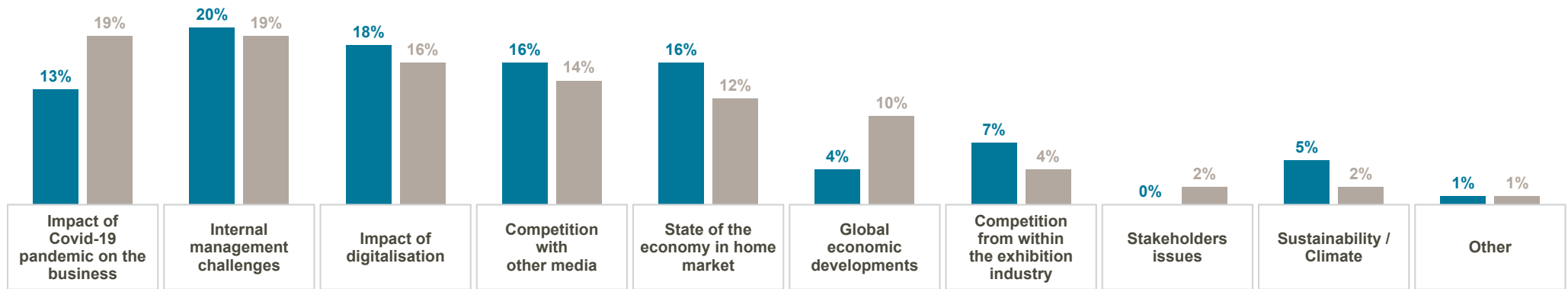
# Detailed results for Colombia



## Most important business issues in the exhibition industry

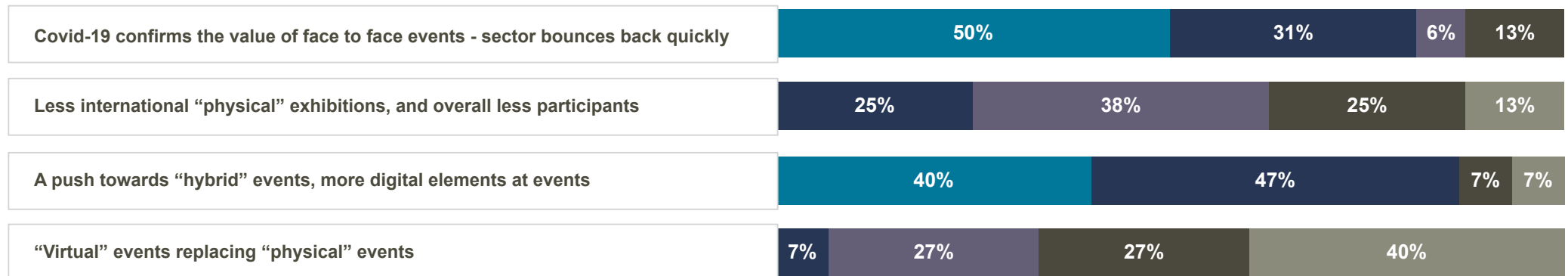
Colombia

Global



## Format of exhibitions in the coming years

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

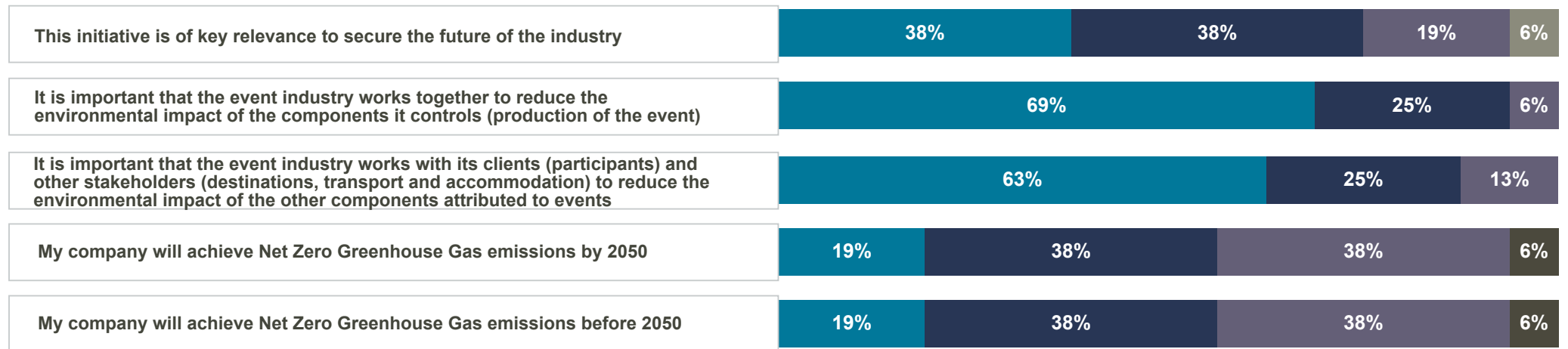






## Climate Change and Net Zero Carbon Events

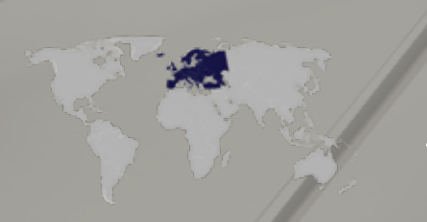
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not





Europe

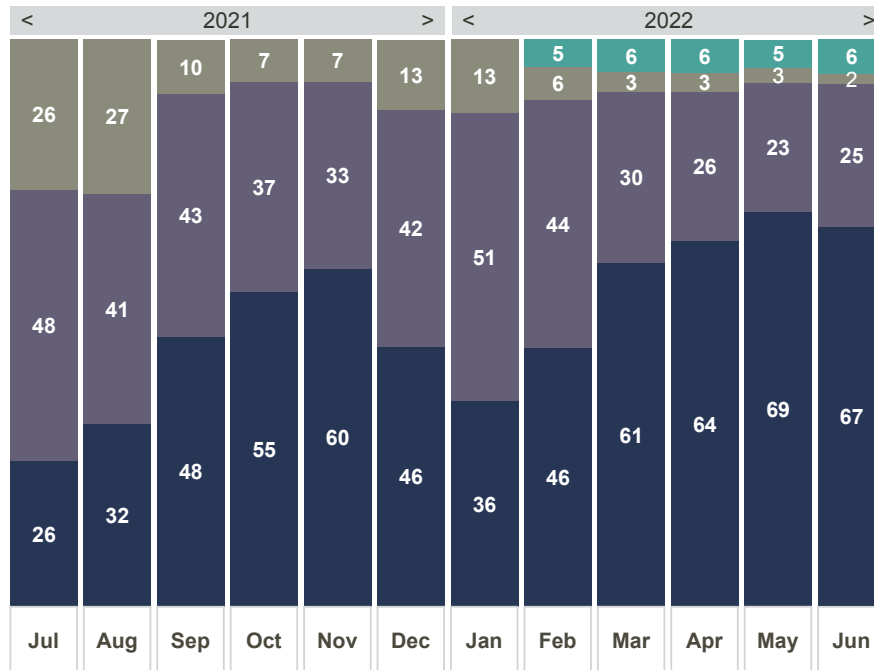
# Operations - Reopening Exhibitions Europe



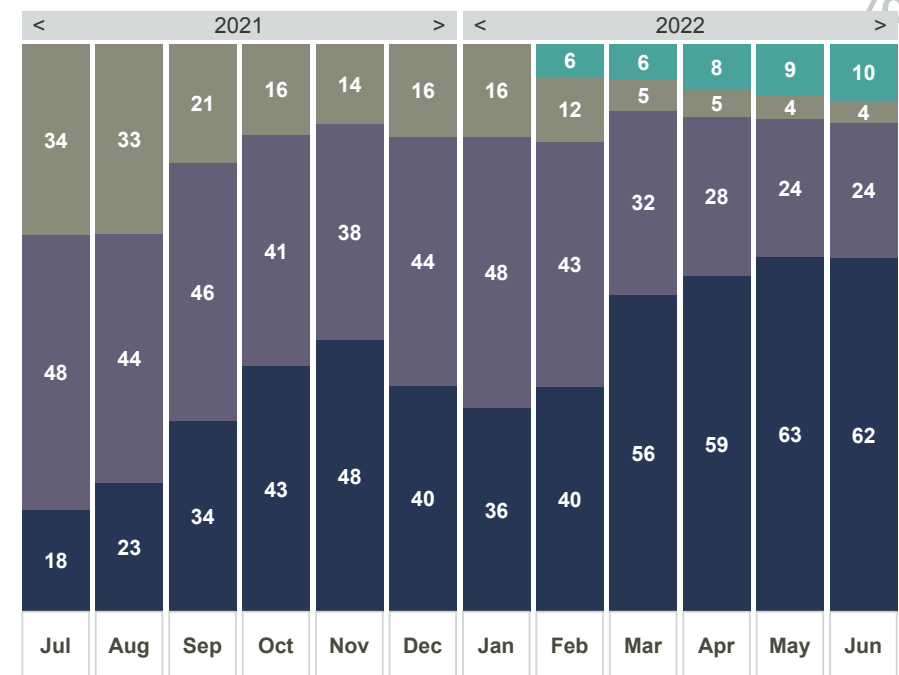
## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



### Europe



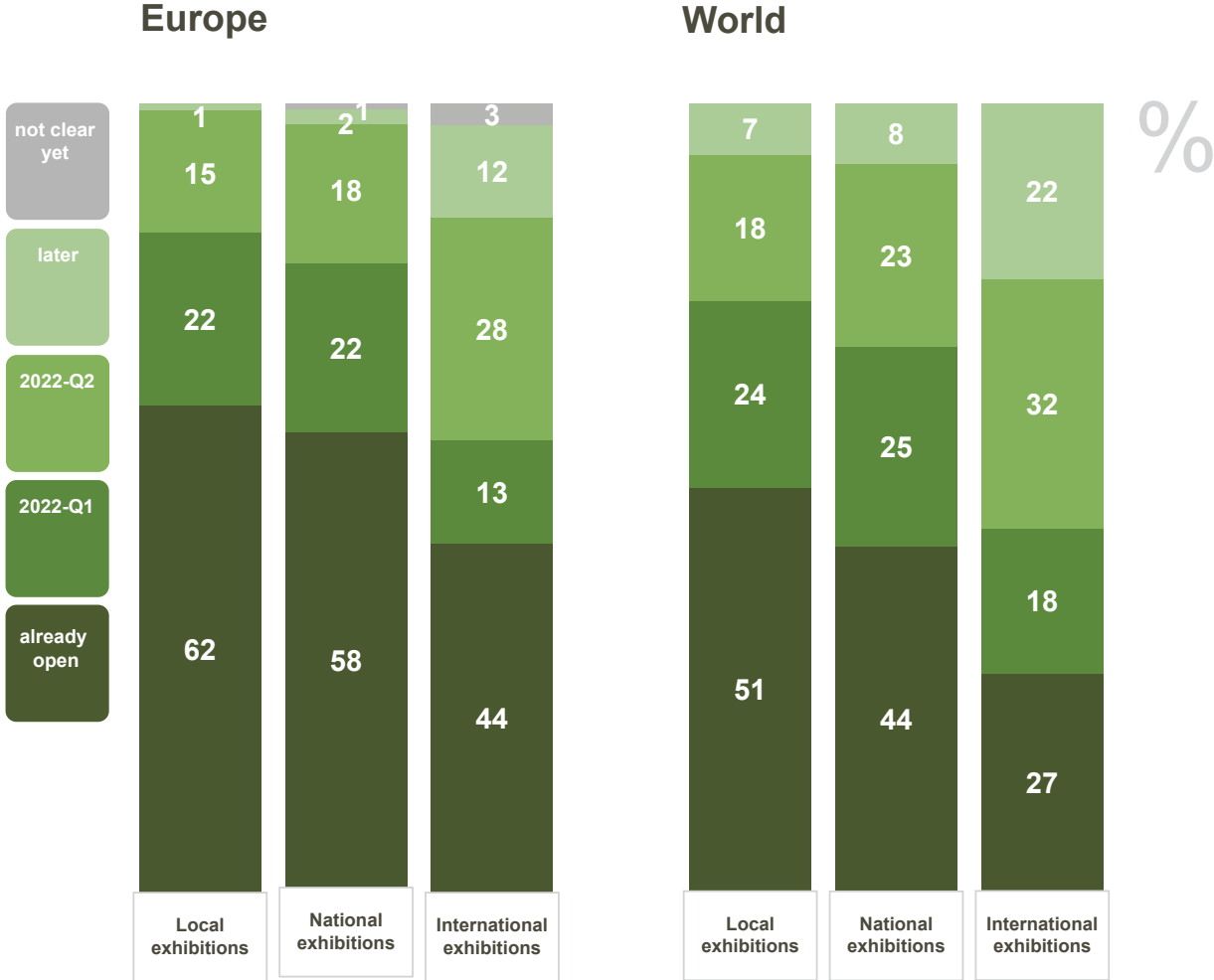
### World



# Operations - Reopening Exhibitions Europe

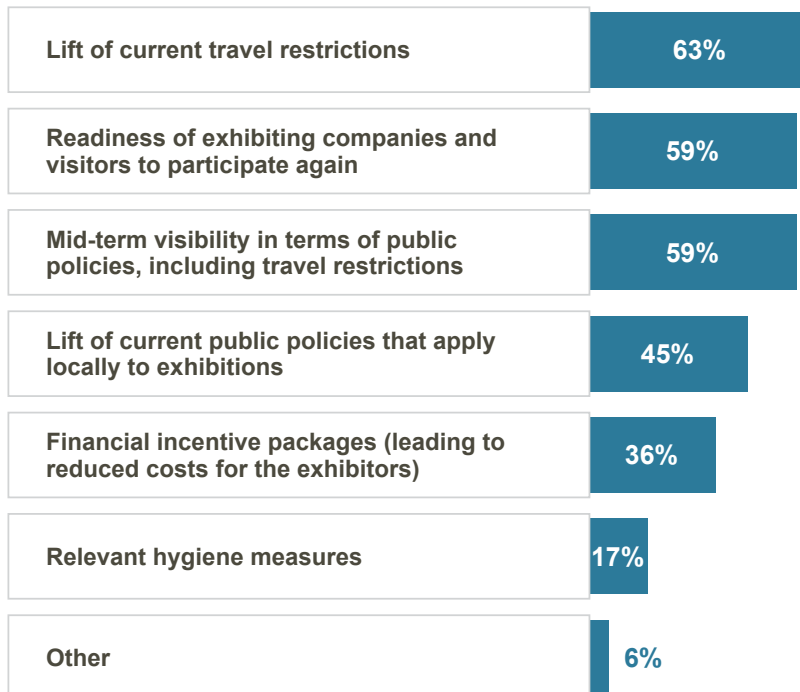


When do you believe exhibitions will open again in your city?

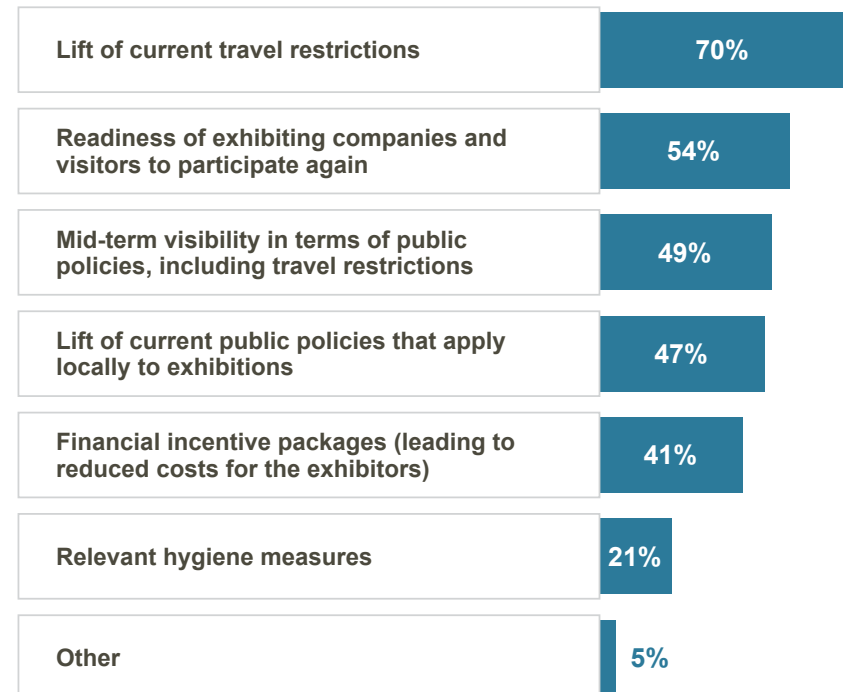


## What do you believe would most help the “bounce back” of exhibitions?

### Europe

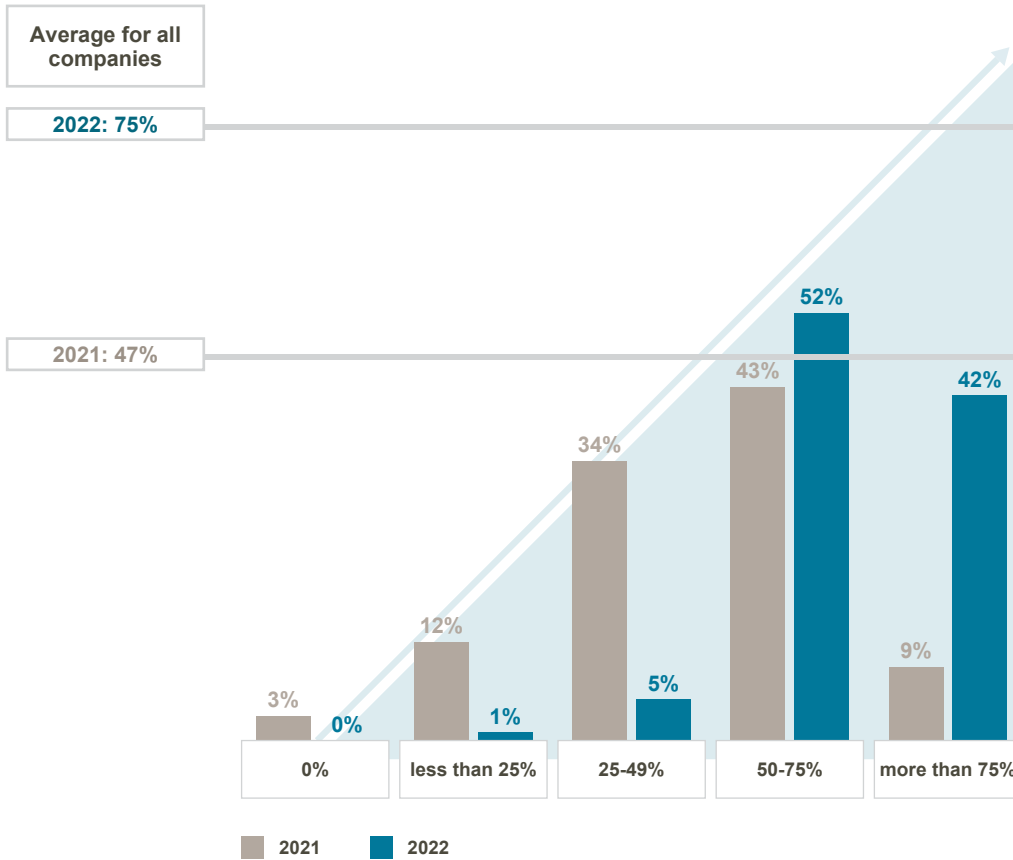


### World

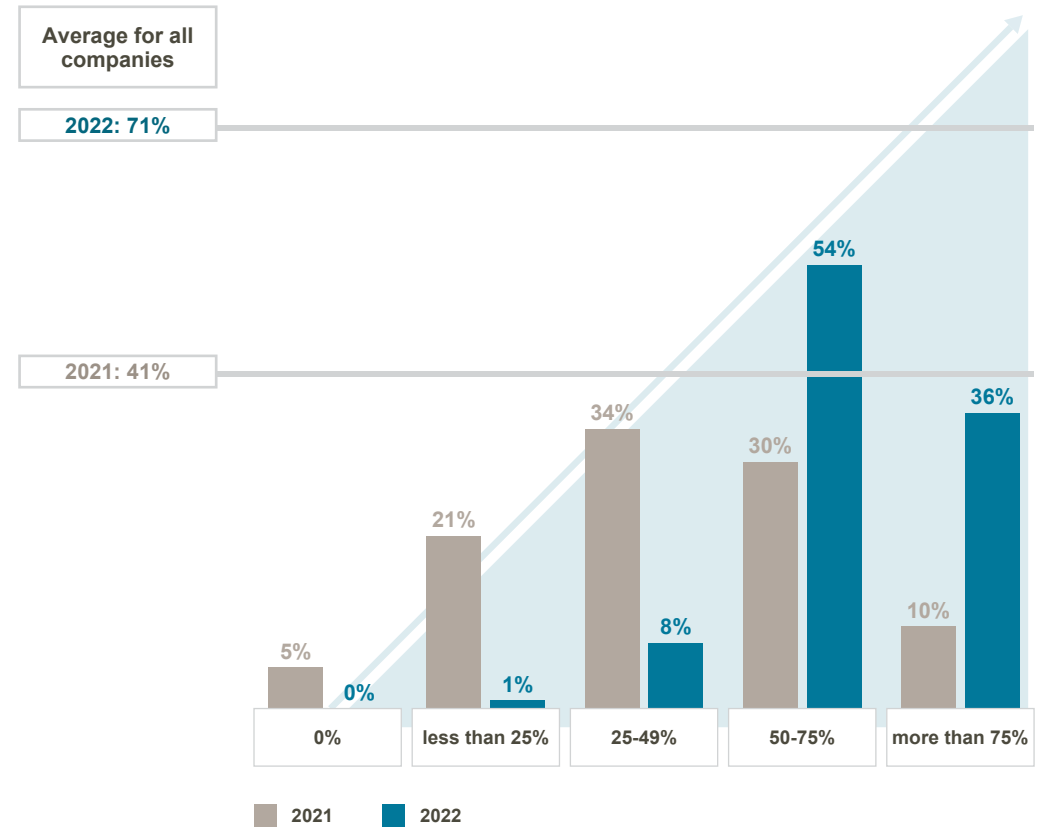


## Revenue compared to 2019

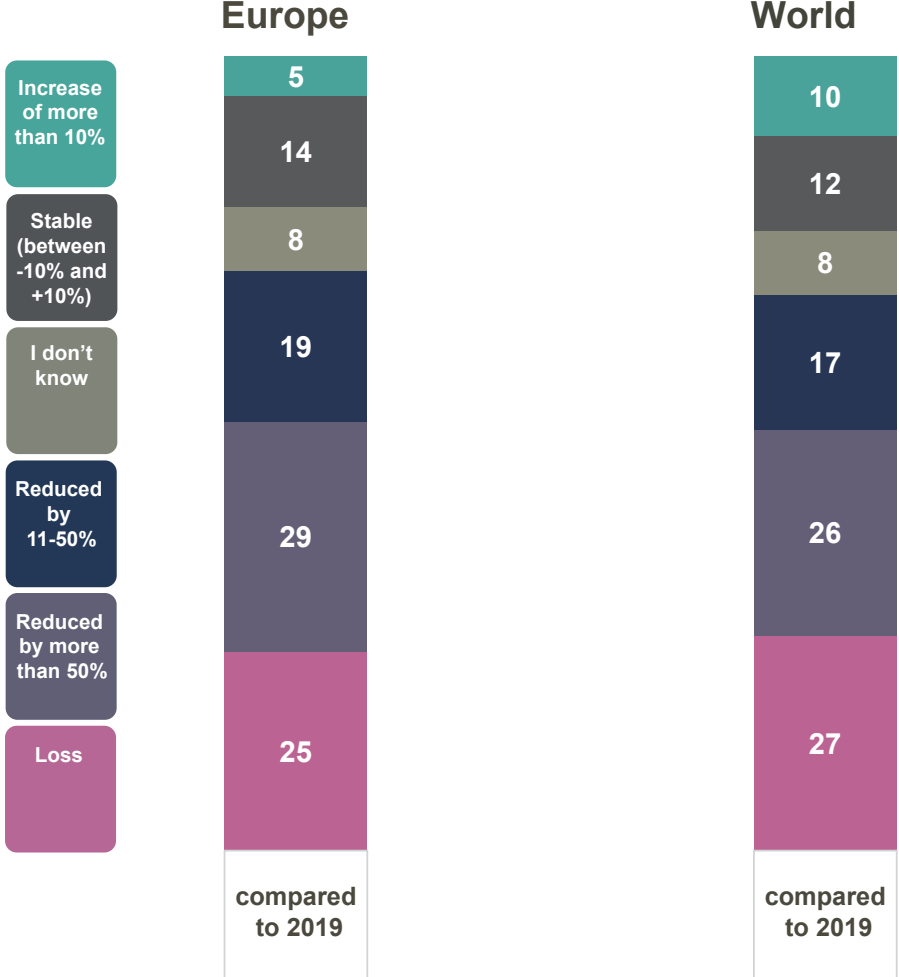
### Europe



### World



# Operating profit 2019 Europe

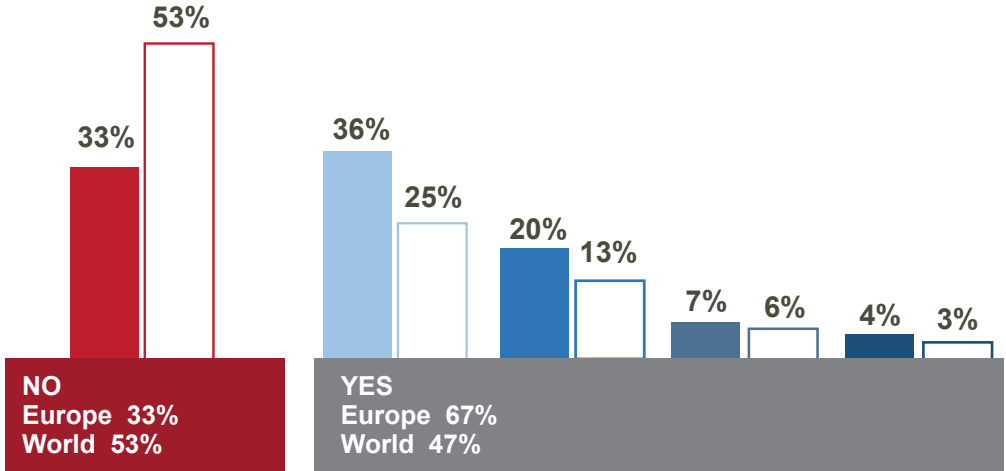


%

## Did your company benefit from public financial support?

Europe World

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



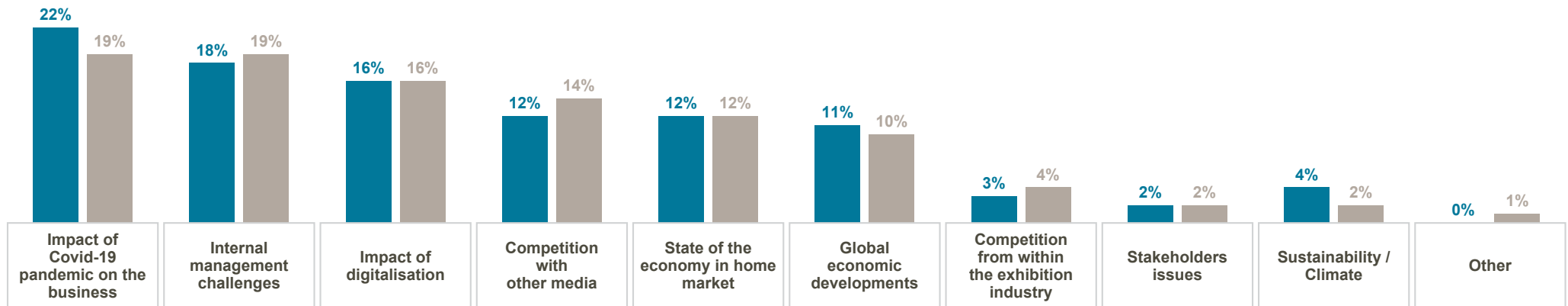


# Most Important Business Issues - Format of Exhibitions - Europe

## Most important business issues in the exhibition industry

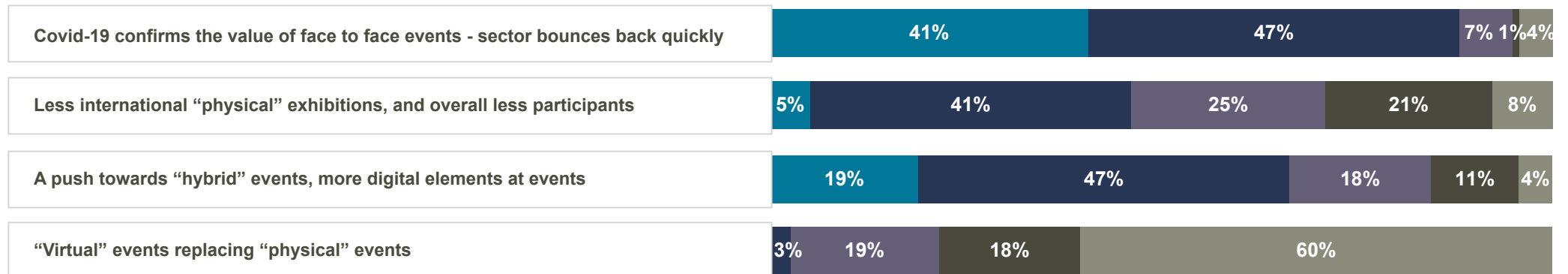
Europe

Global



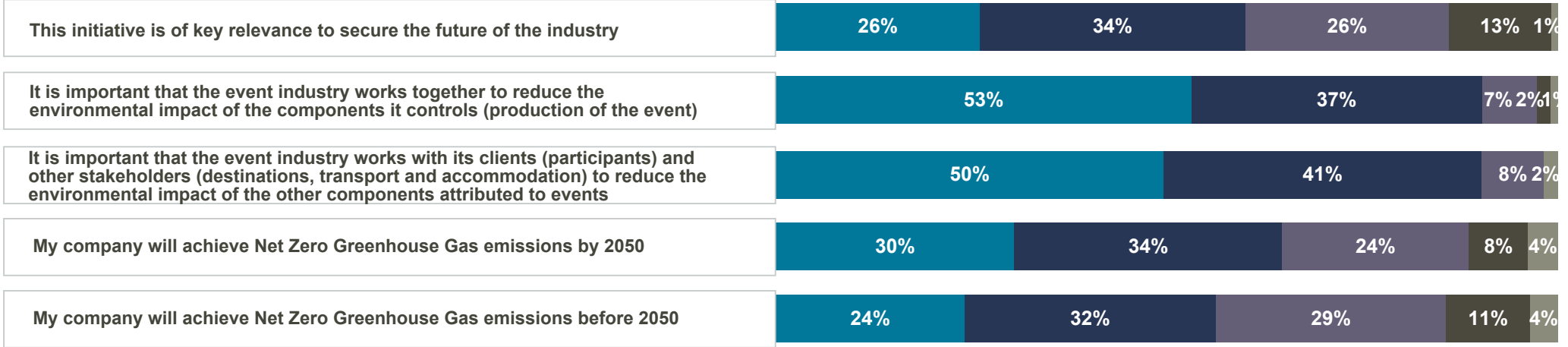
## Format of exhibitions in the coming years

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

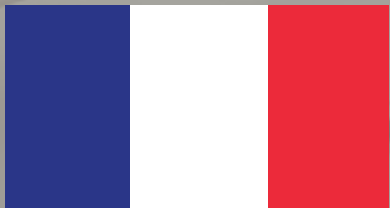


## Climate Change and Net Zero Carbon Events

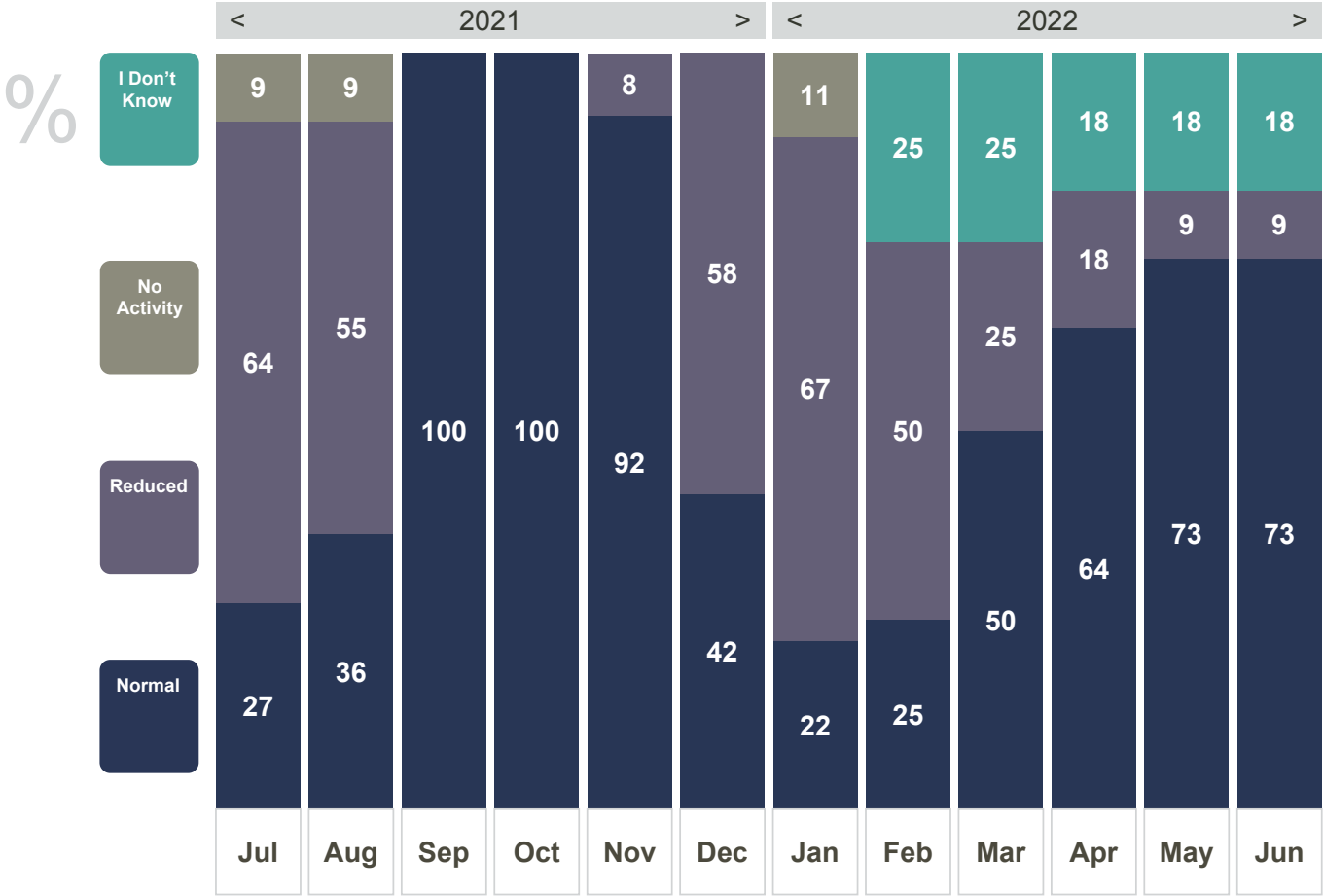
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not

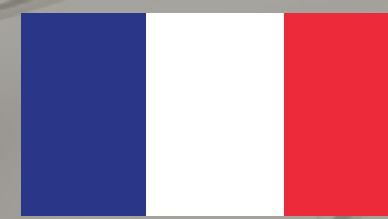


# Detailed results for France

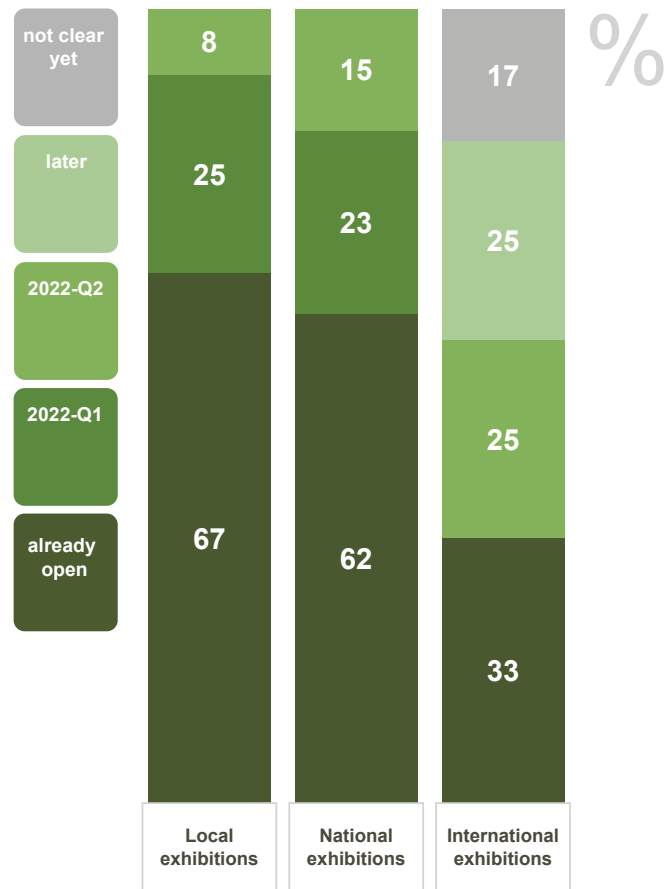


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

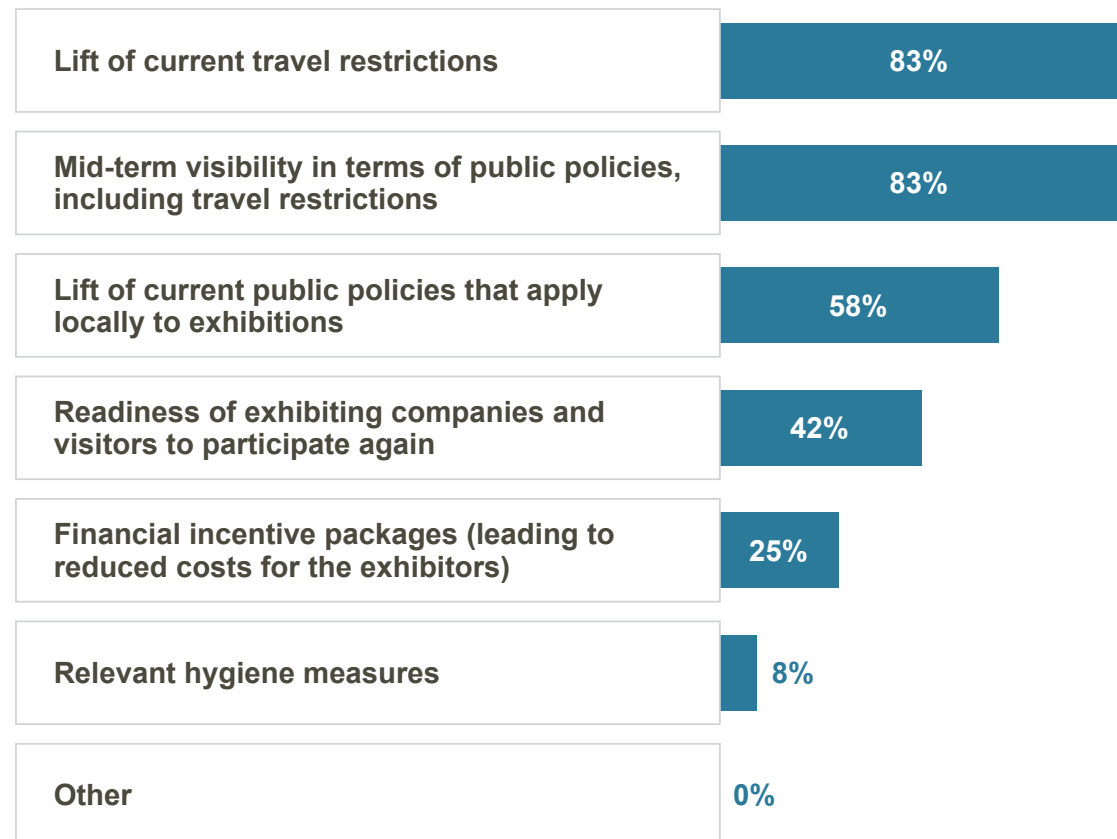


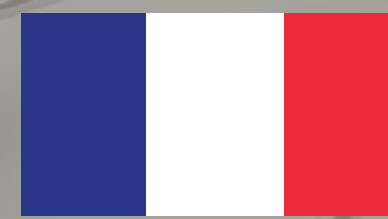


## When do you believe exhibitions will open again in your city?

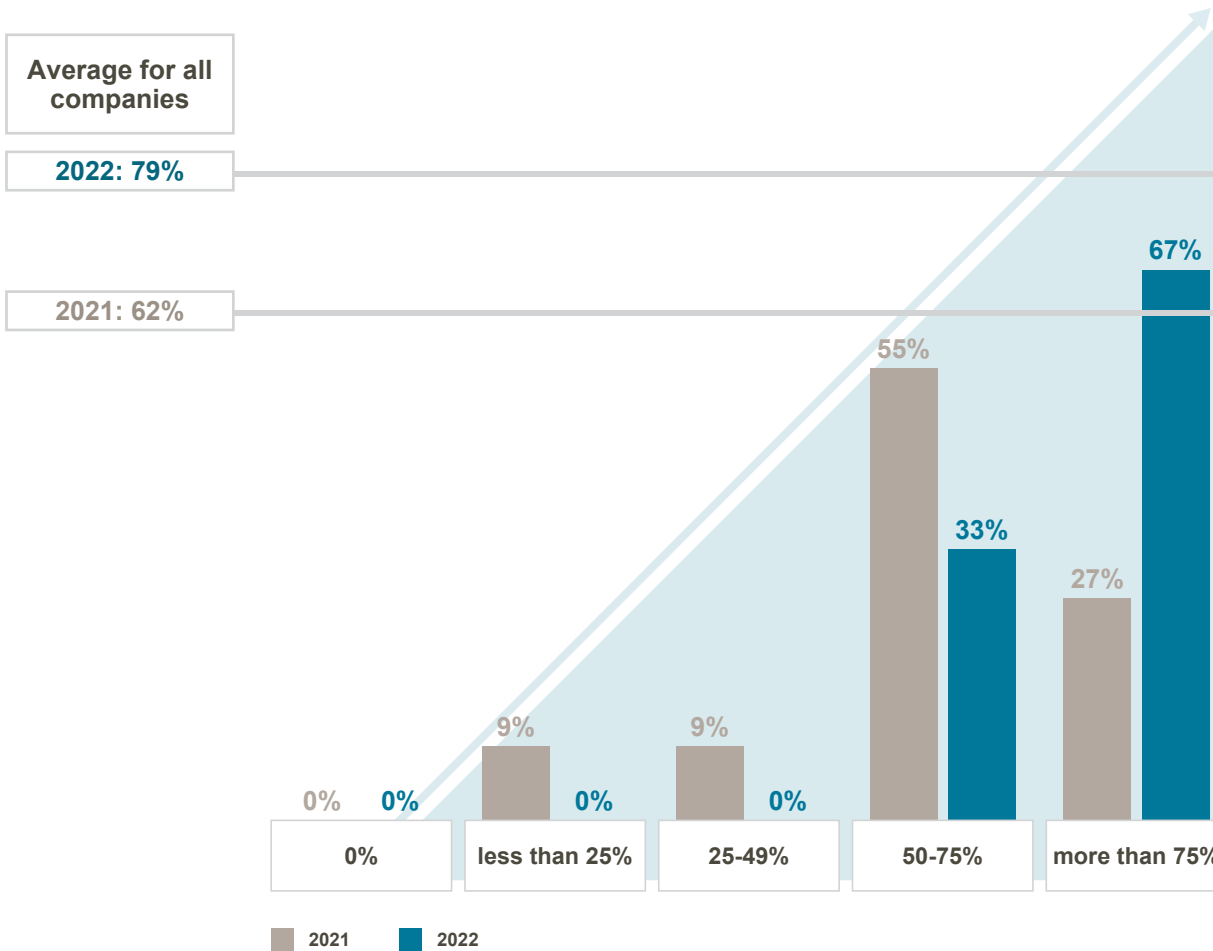


## What do you believe would most help the “bounce back” of exhibitions?

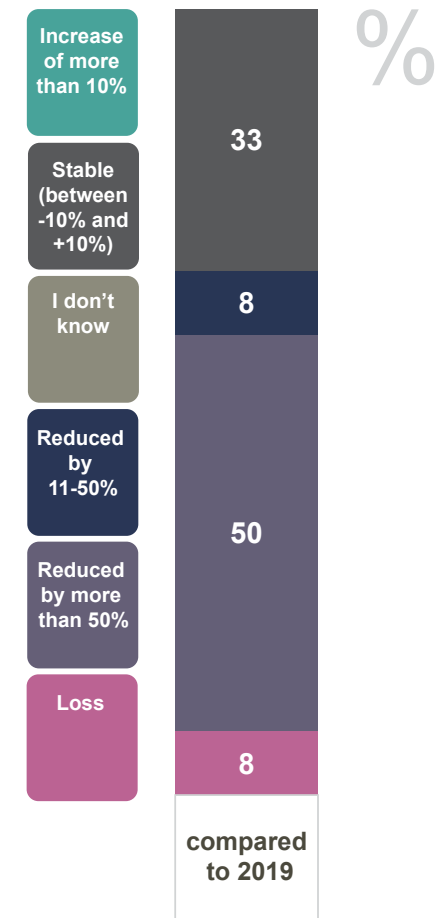


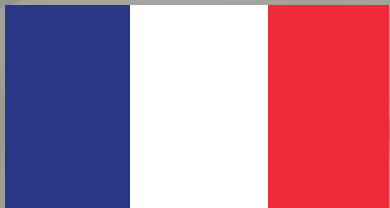


## Revenue compared to 2019



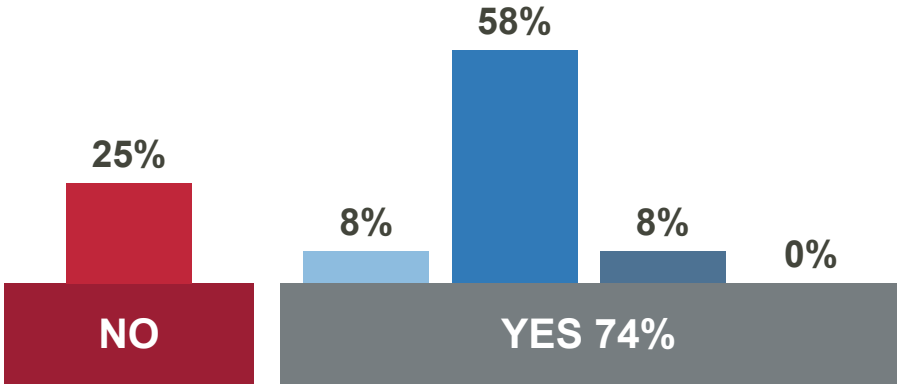
## Operating Profits 2021

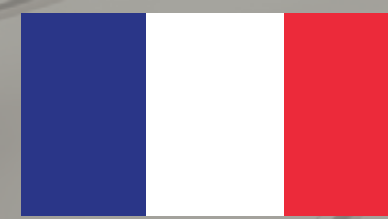




## Did your company benefit from public financial support?

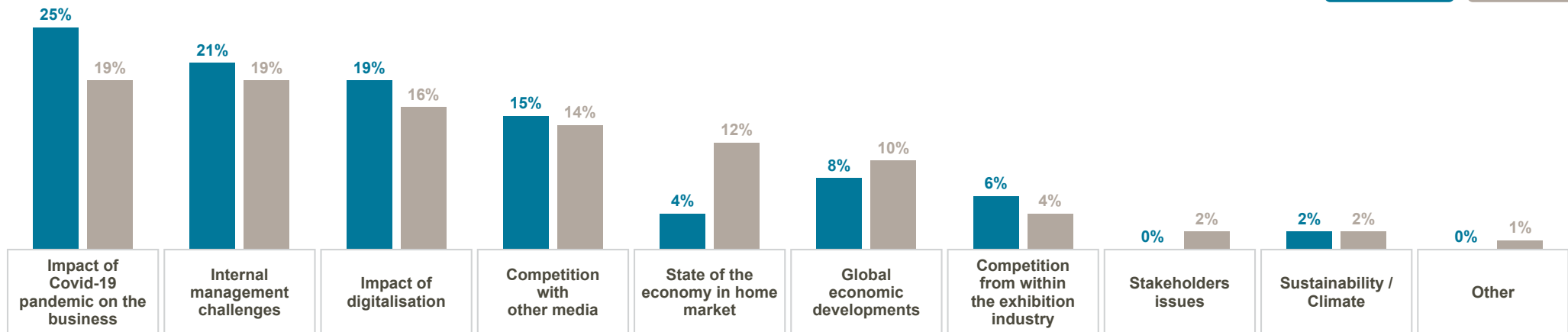
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





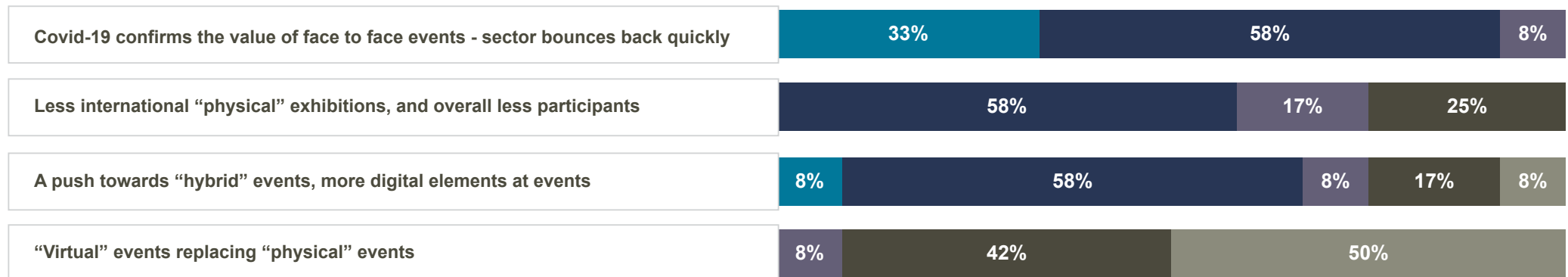
## Most important business issues in the exhibition industry

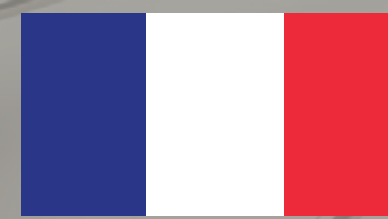
France Global



## Format of exhibitions in the coming years

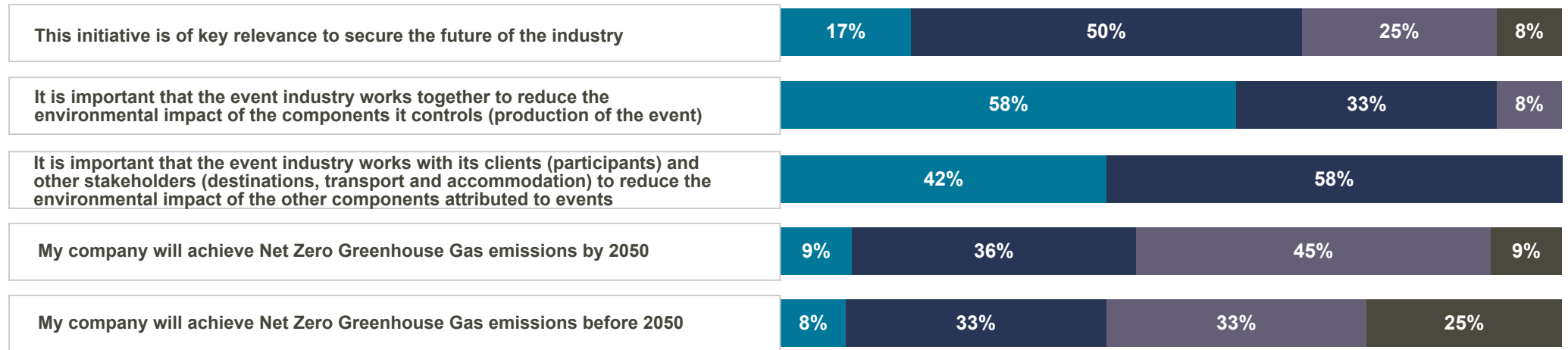
Yes, for sure Most probably Not sure Not sure at all Definitely not





## Climate Change and Net Zero Carbon Events

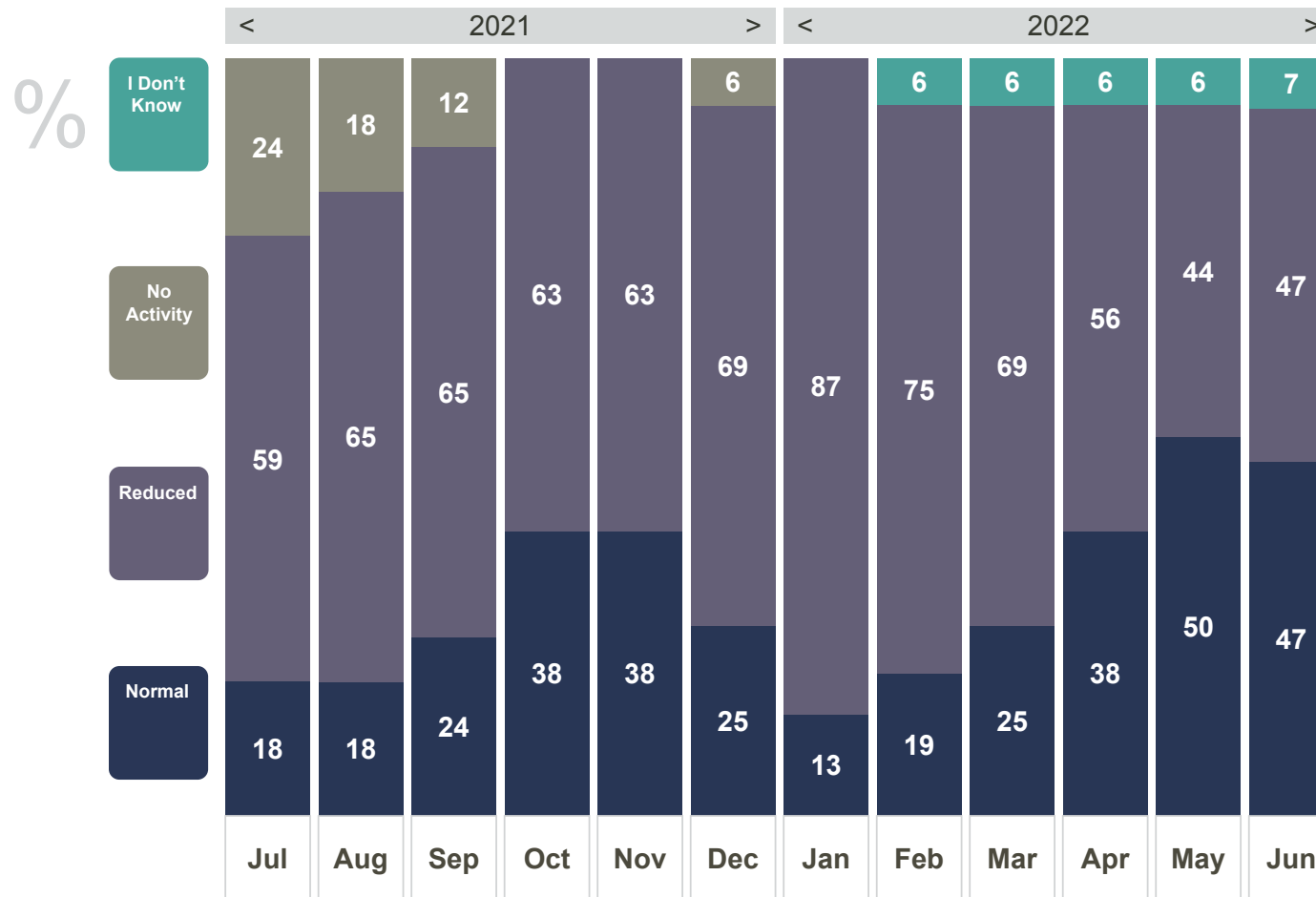
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not





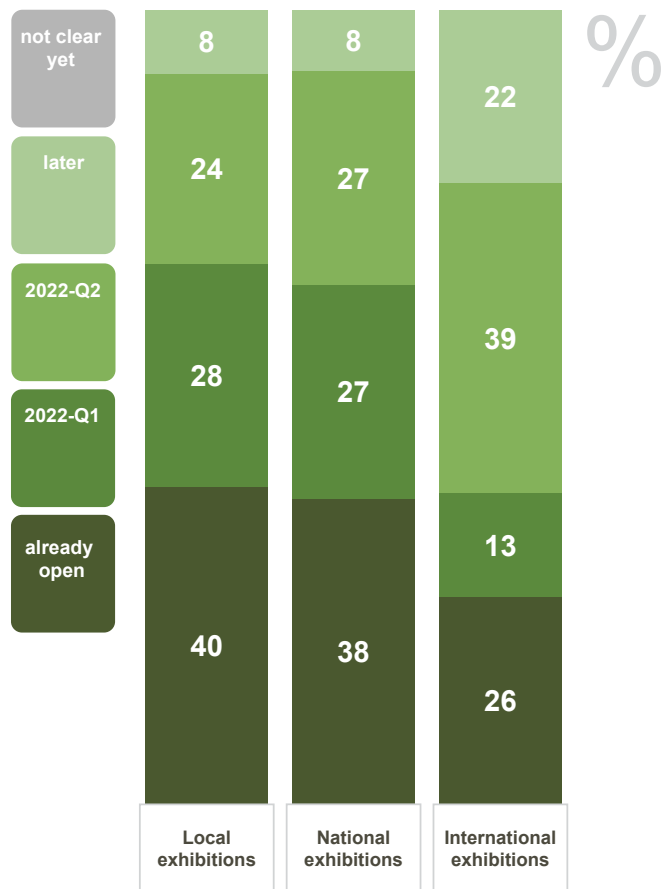


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

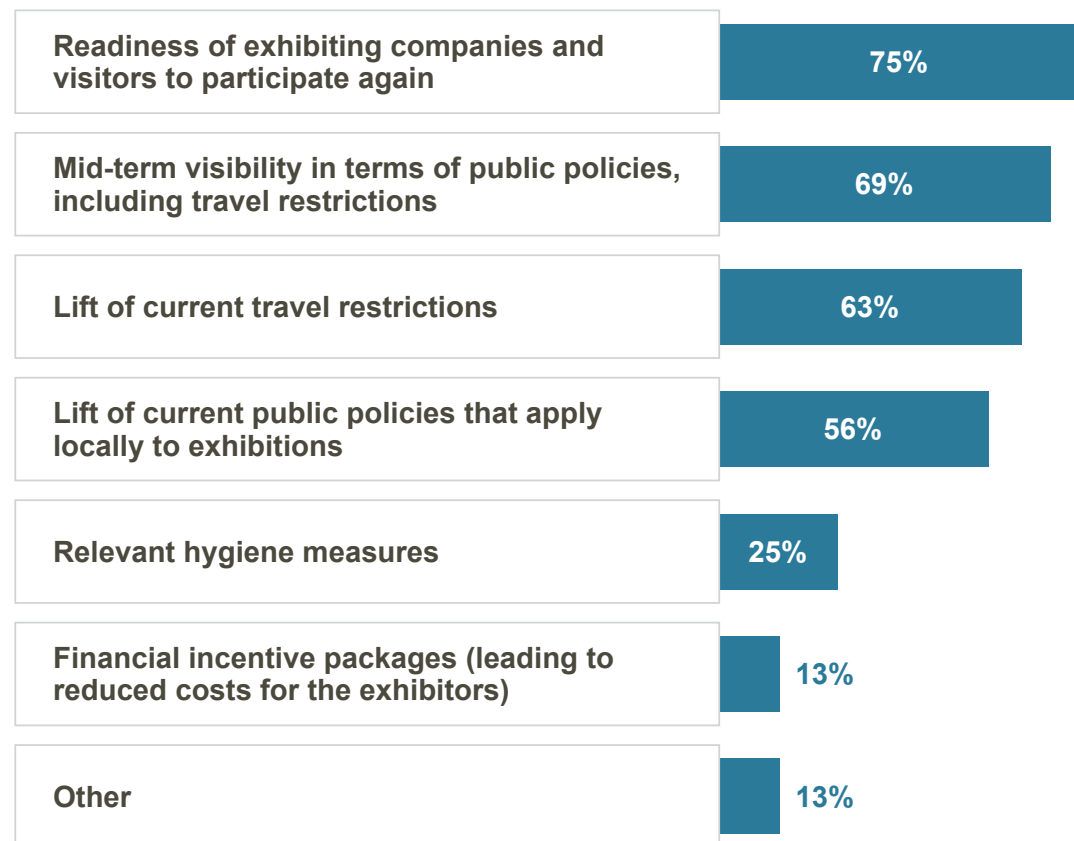




## When do you believe exhibitions will open again in your city?



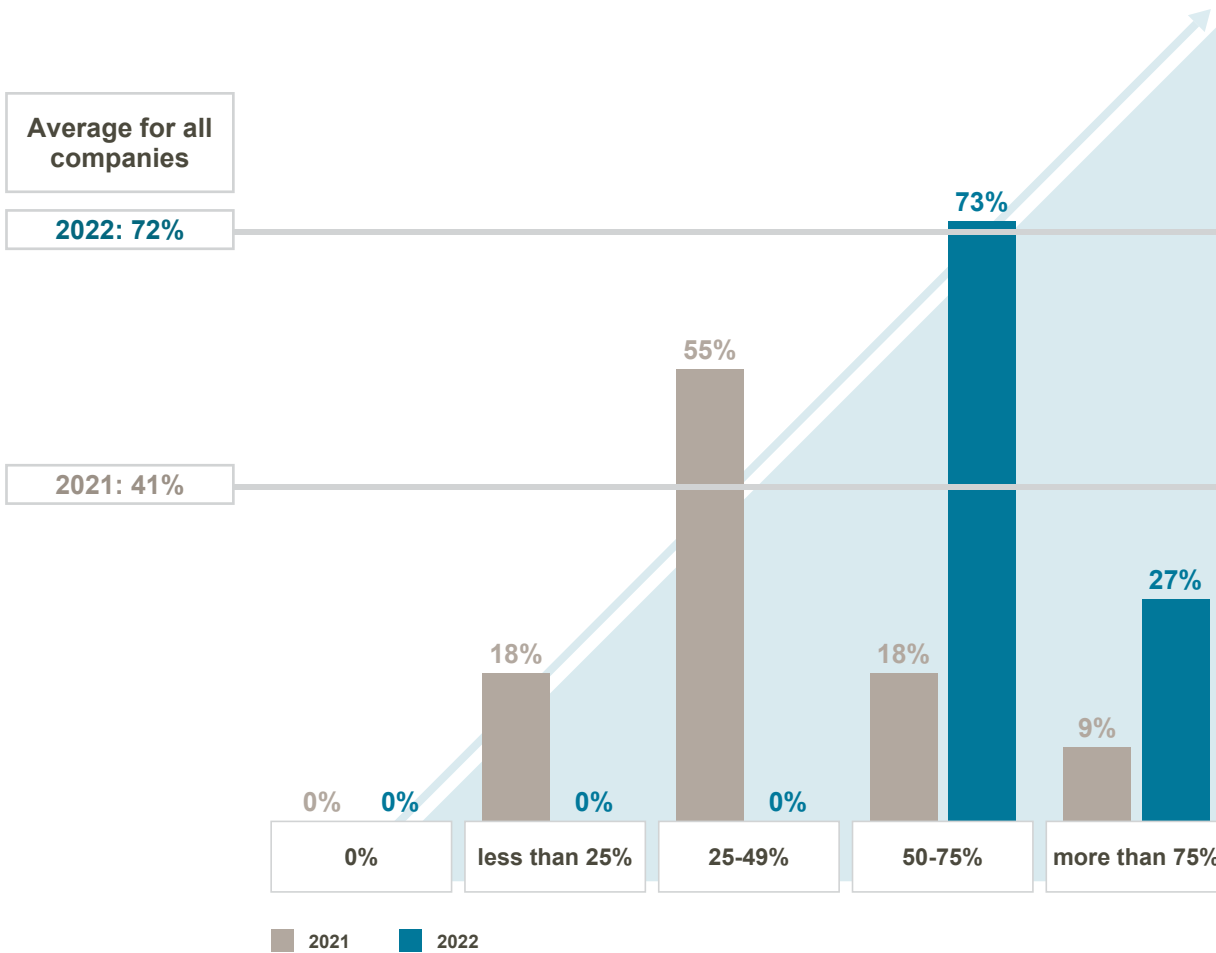
## What do you believe would most help the “bounce back” of exhibitions?



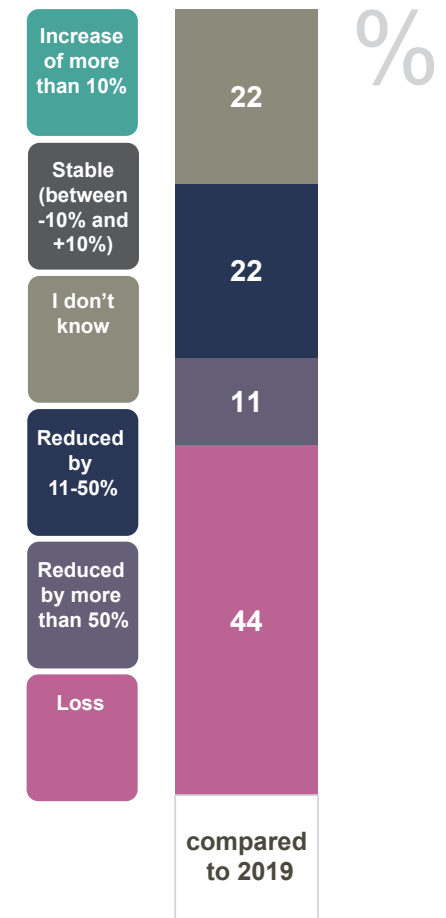
# Detailed results for Germany



## Revenue compared to 2019



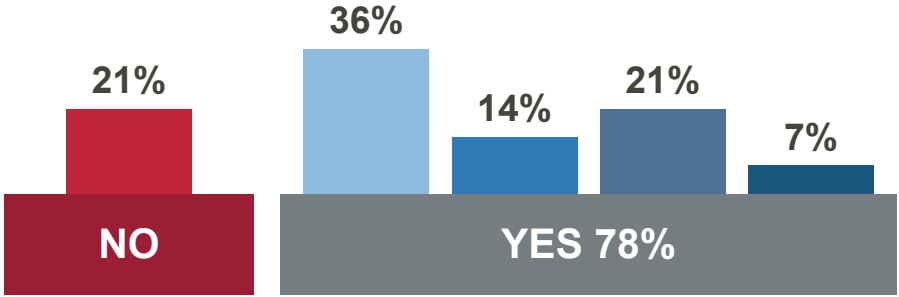
## Operating Profits 2021





## Did your company benefit from public financial support?

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

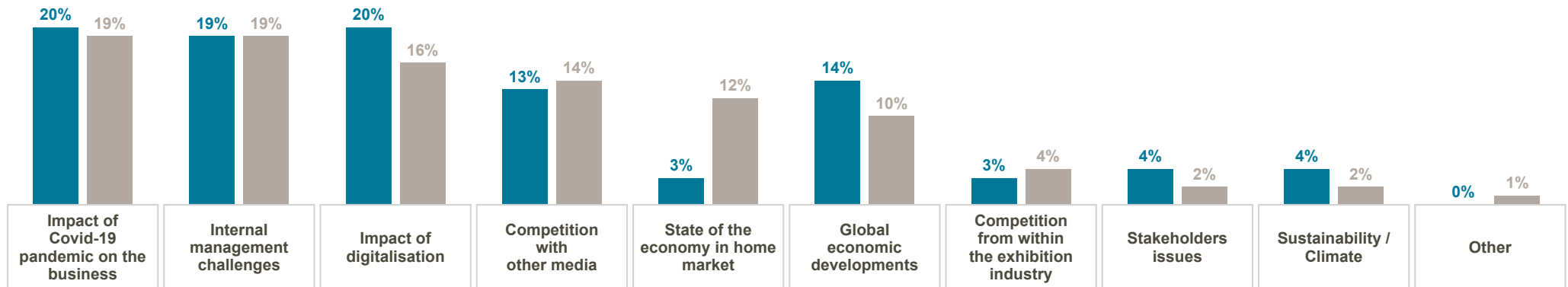




## Most important business issues in the exhibition industry

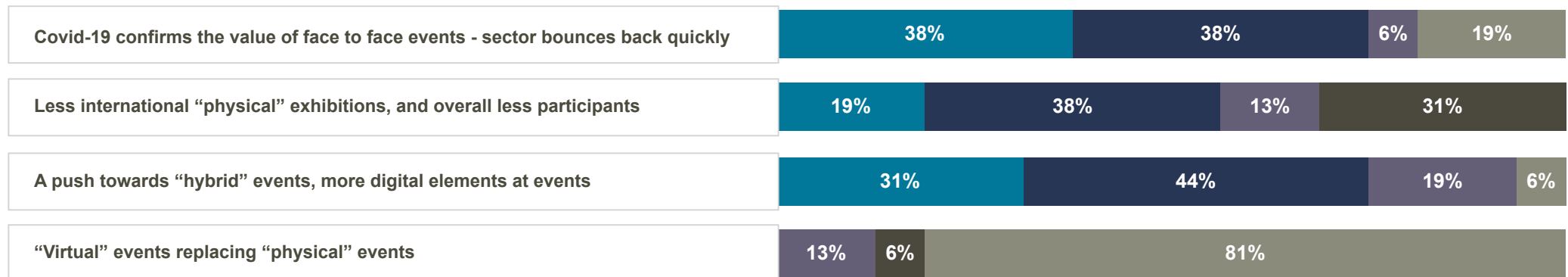
Germany

Global



## Format of exhibitions in the coming years

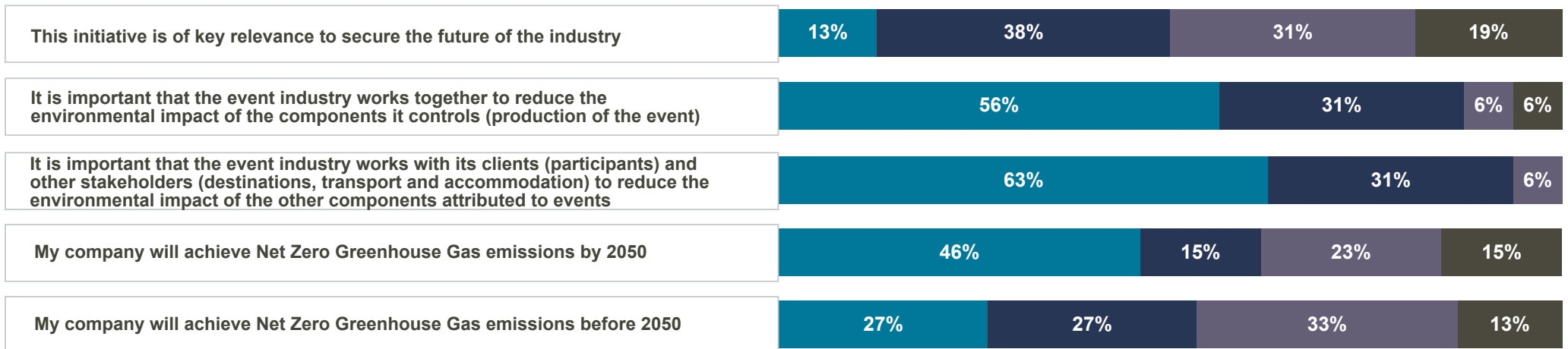
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not

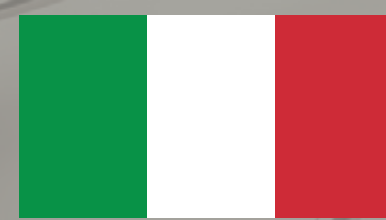




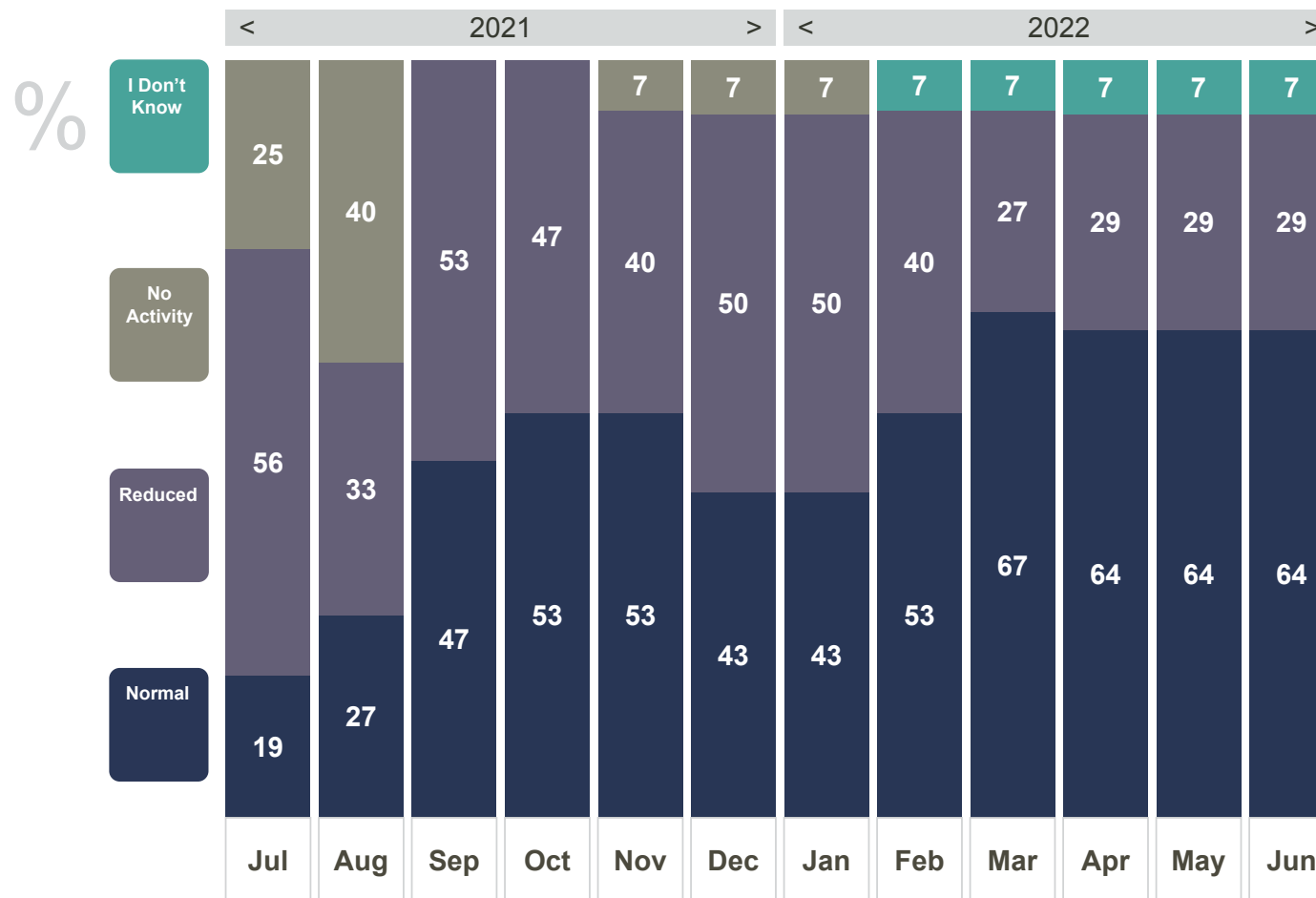
## Climate Change and Net Zero Carbon Events

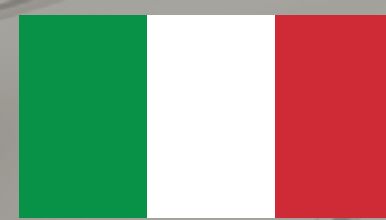
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not



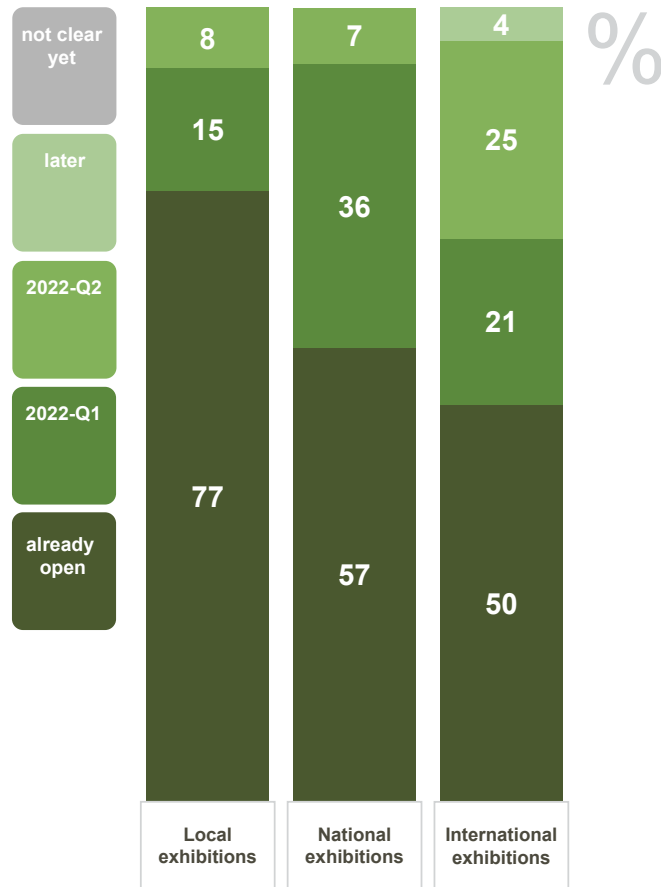


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

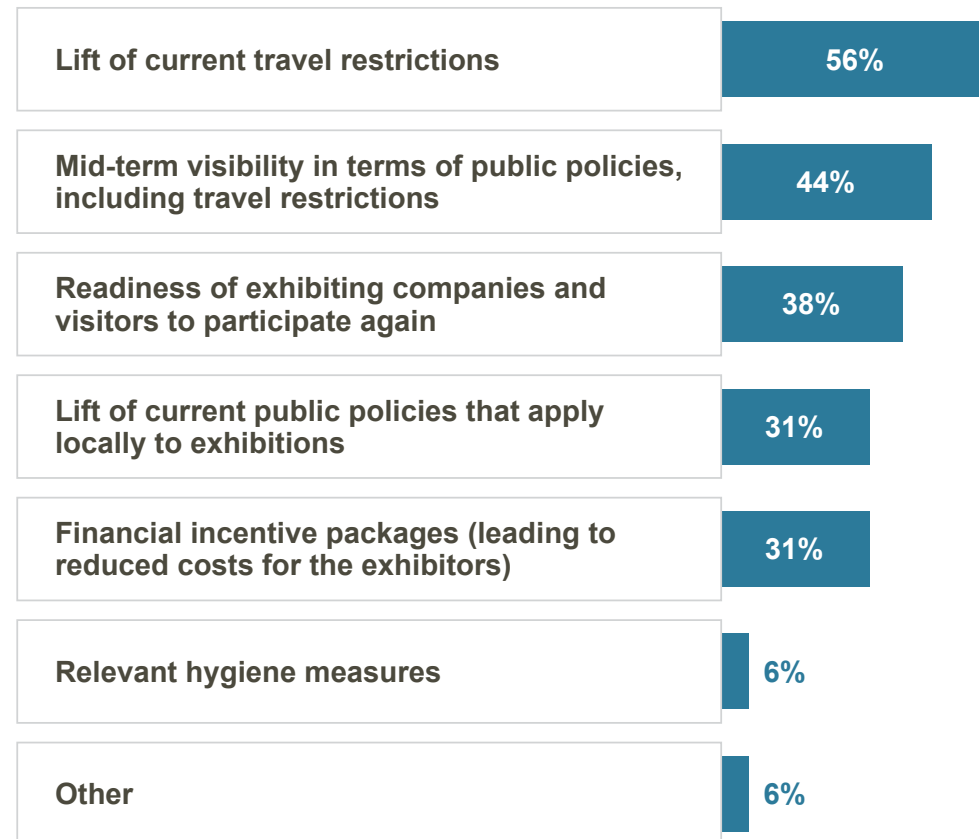




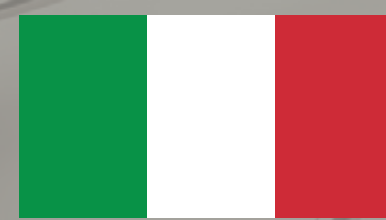
## When do you believe exhibitions will open again in your city?



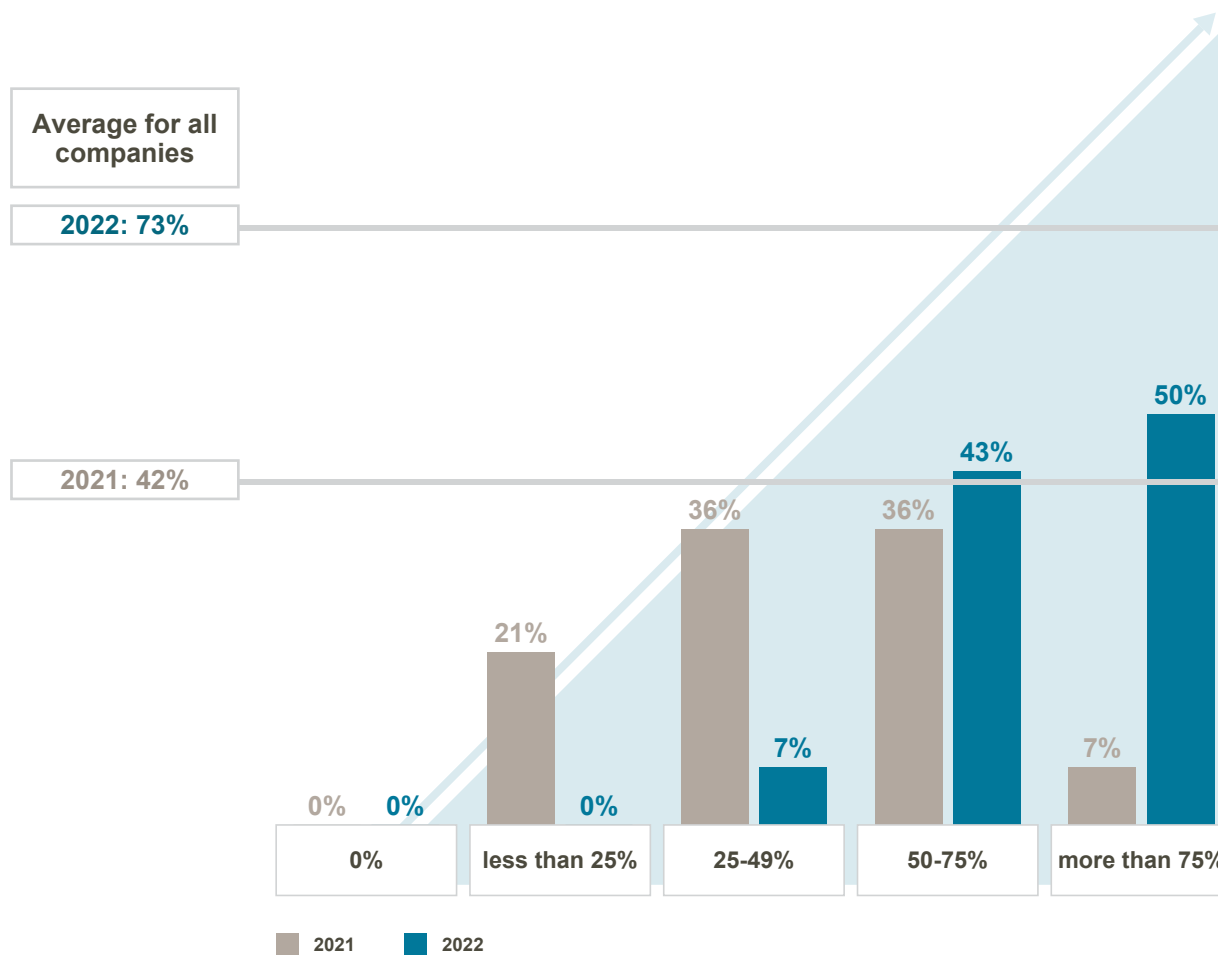
## What do you believe would most help the “bounce back” of exhibitions?



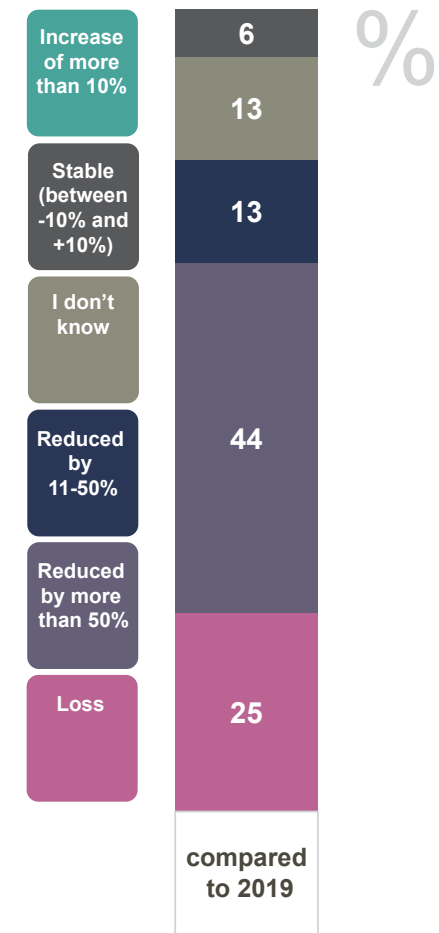




## Revenue compared to 2019



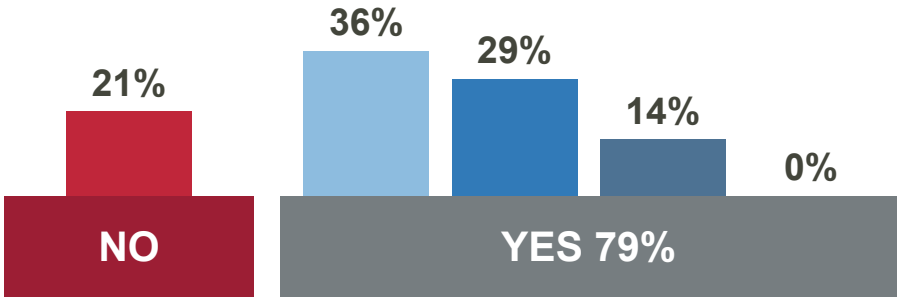
## Operating Profits 2021

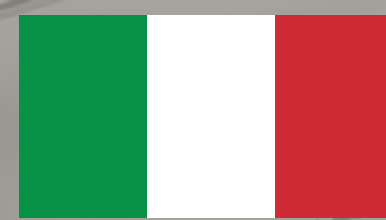




## Did your company benefit from public financial support?

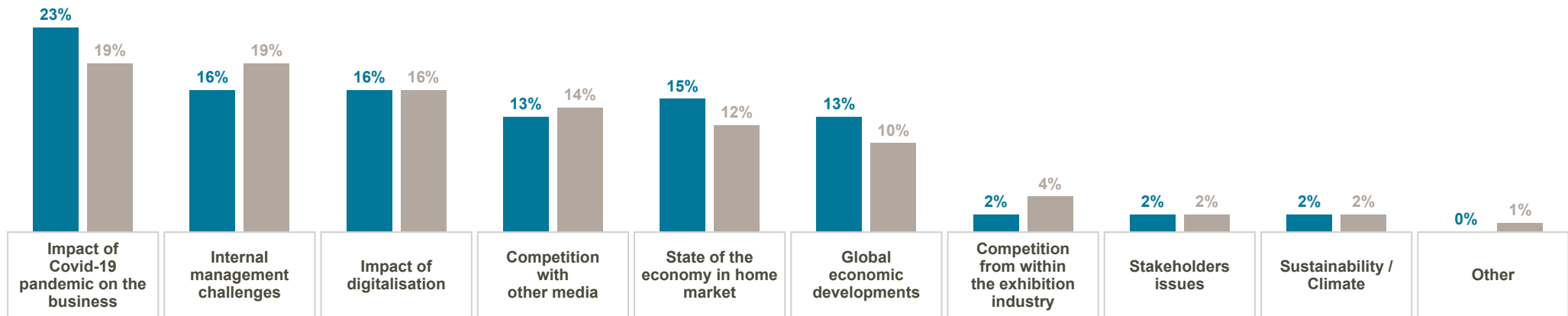
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





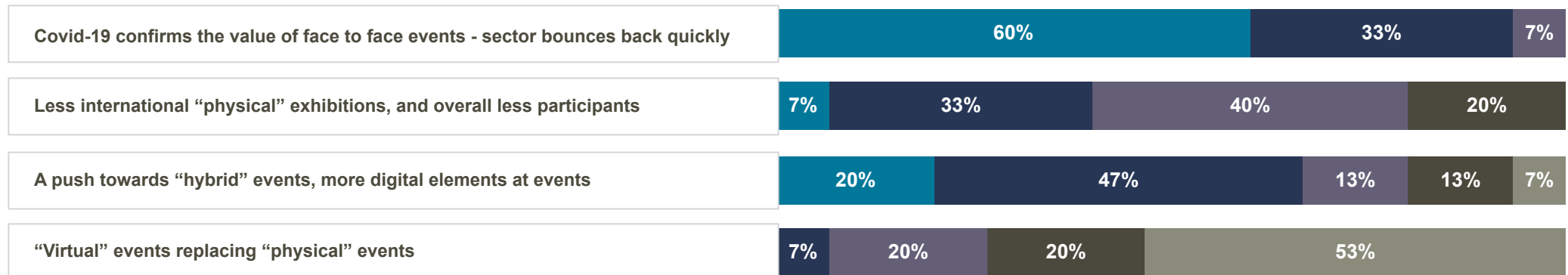
## Most important business issues in the exhibition industry

Italy Global



## Format of exhibitions in the coming years

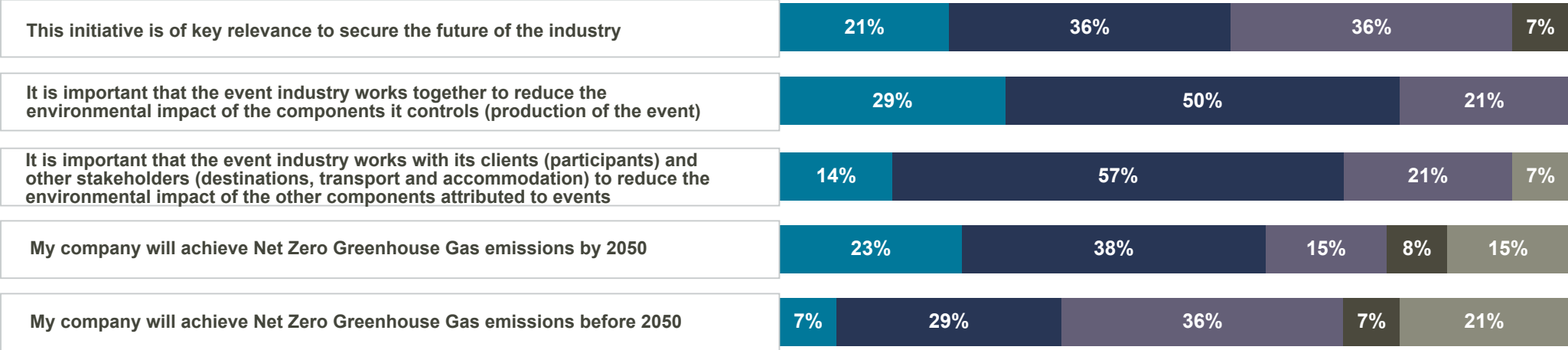
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not

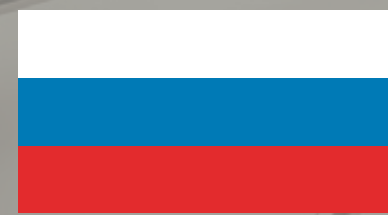




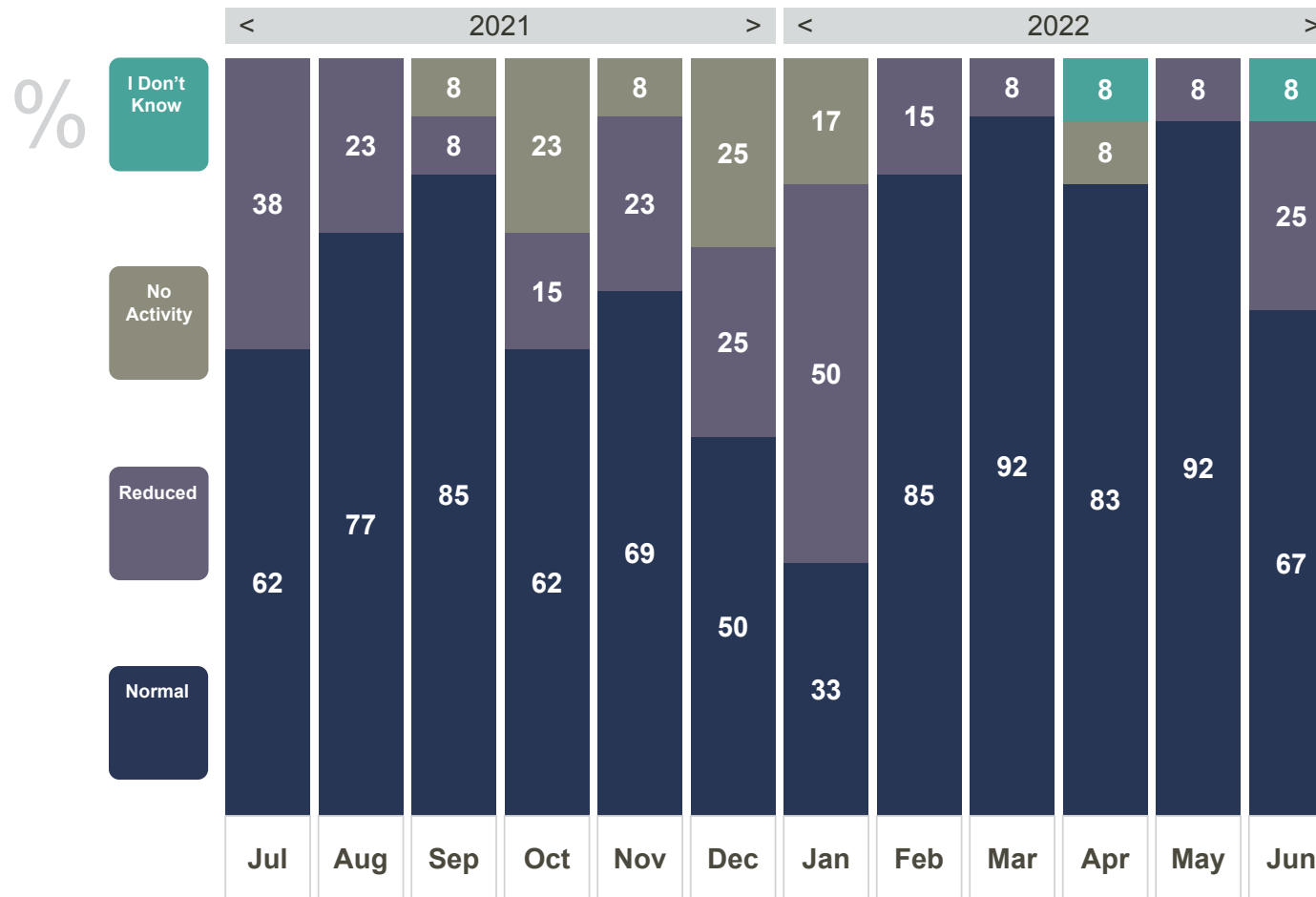
## Climate Change and Net Zero Carbon Events

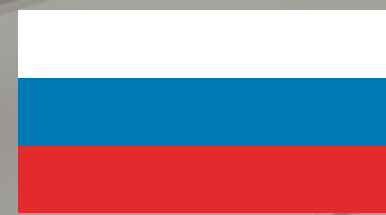
■ Yes, for sure ■ Most probably ■ Not sure ■ Not sure at all ■ Definitely not



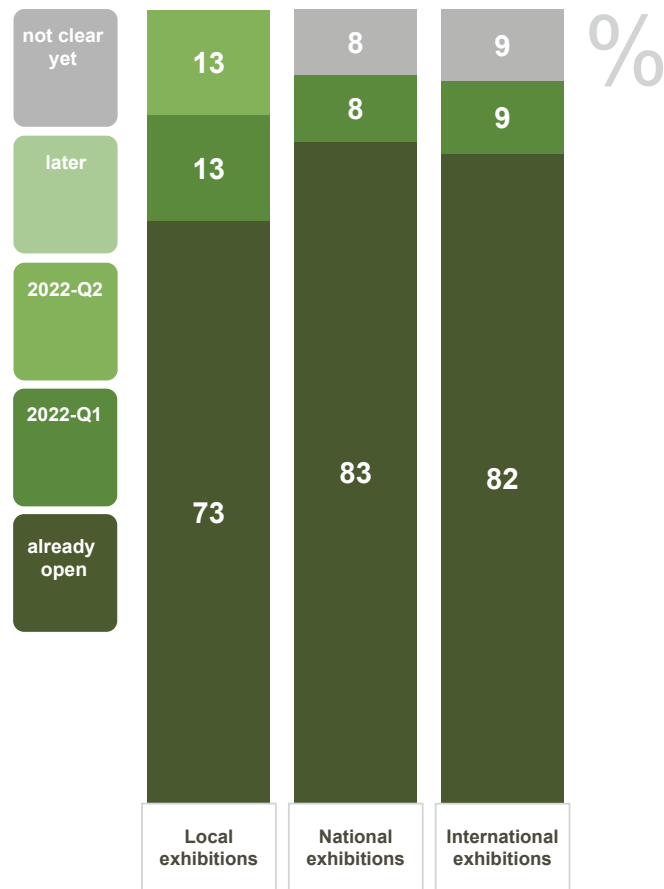


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

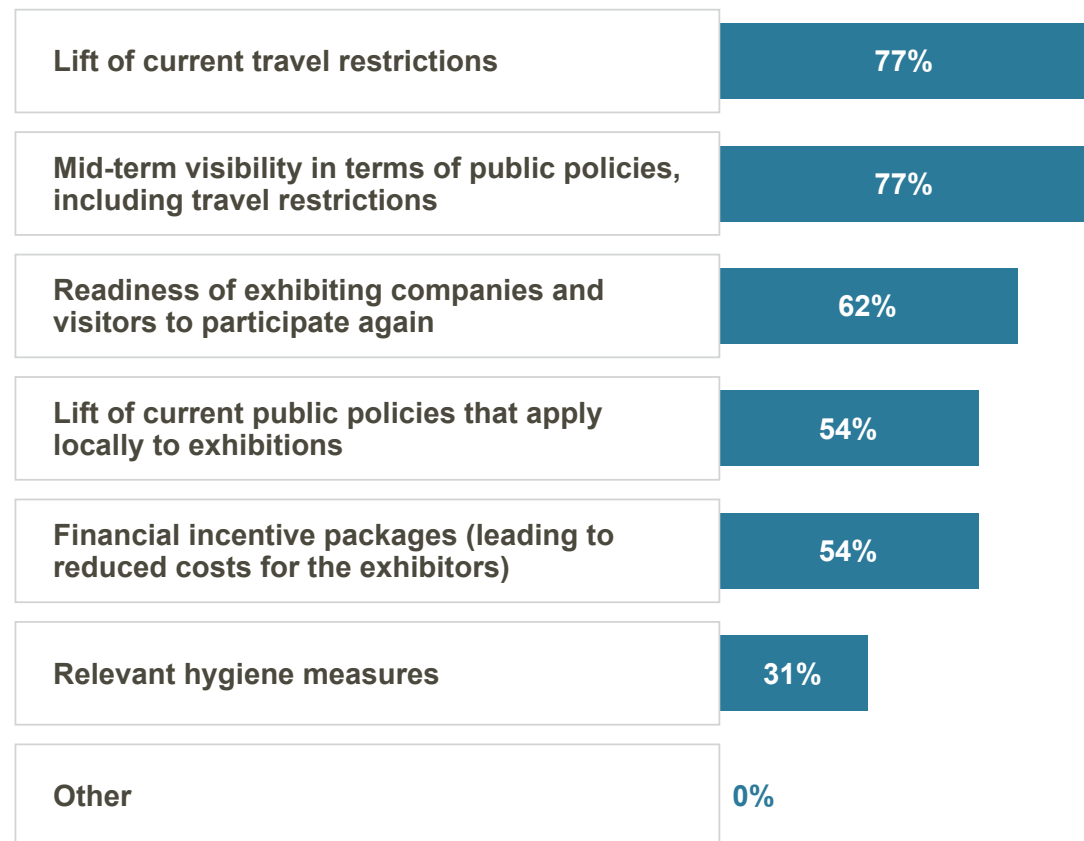




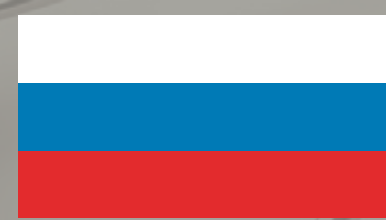
## When do you believe exhibitions will open again in your city?



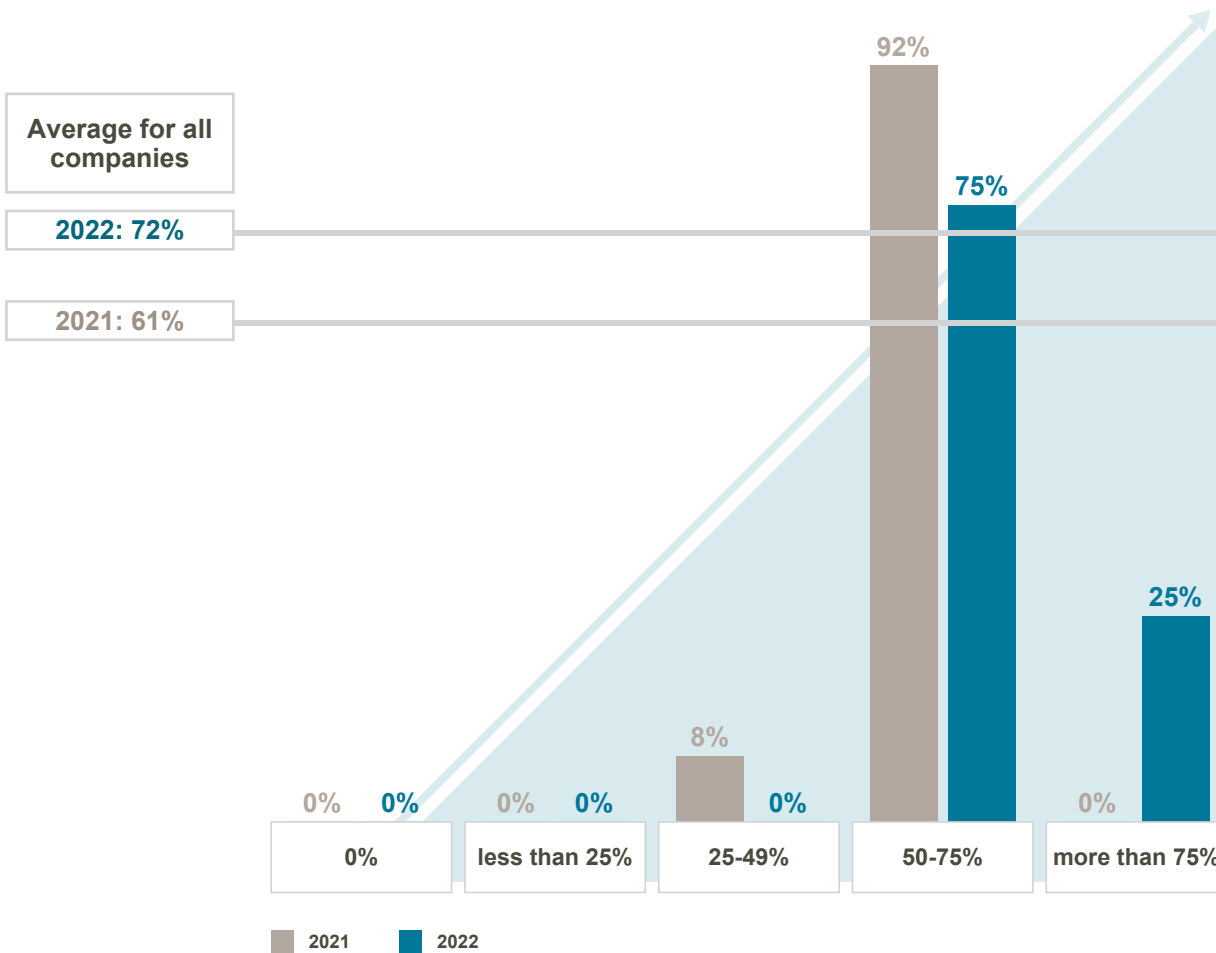
## What do you believe would most help the “bounce back” of exhibitions?



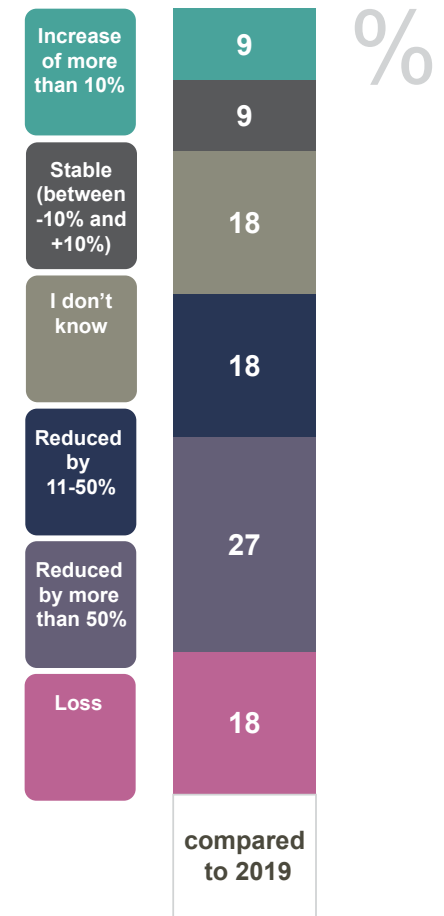
# Detailed results for Russian Federation



## Revenue compared to 2019



## Operating Profits 2021

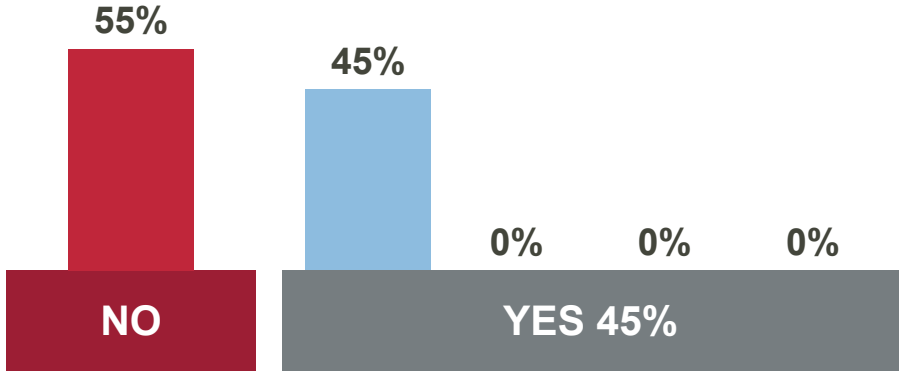


# Detailed results for Russian Federation



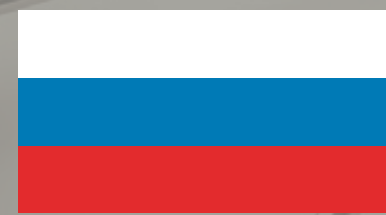
Did your company benefit from public financial support?

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





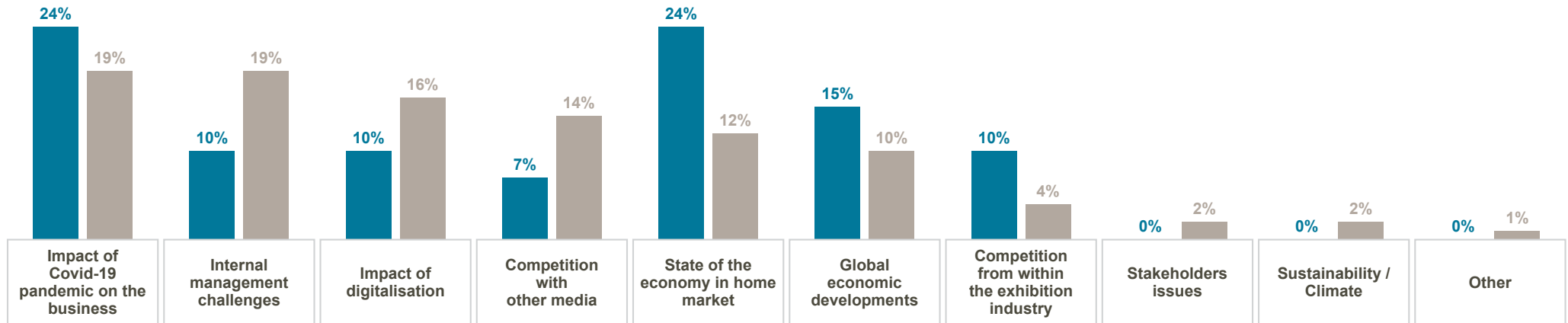
# Detailed results for Russian Federation



## Most important business issues in the exhibition industry

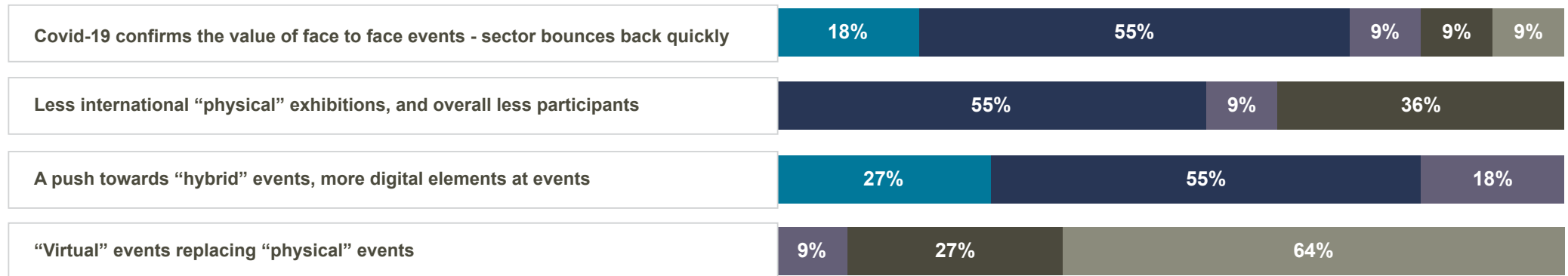
Russian Federation

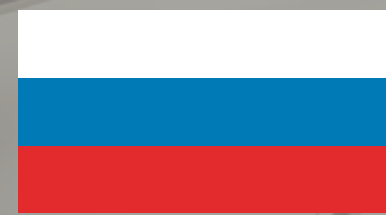
Global



## Format of exhibitions in the coming years

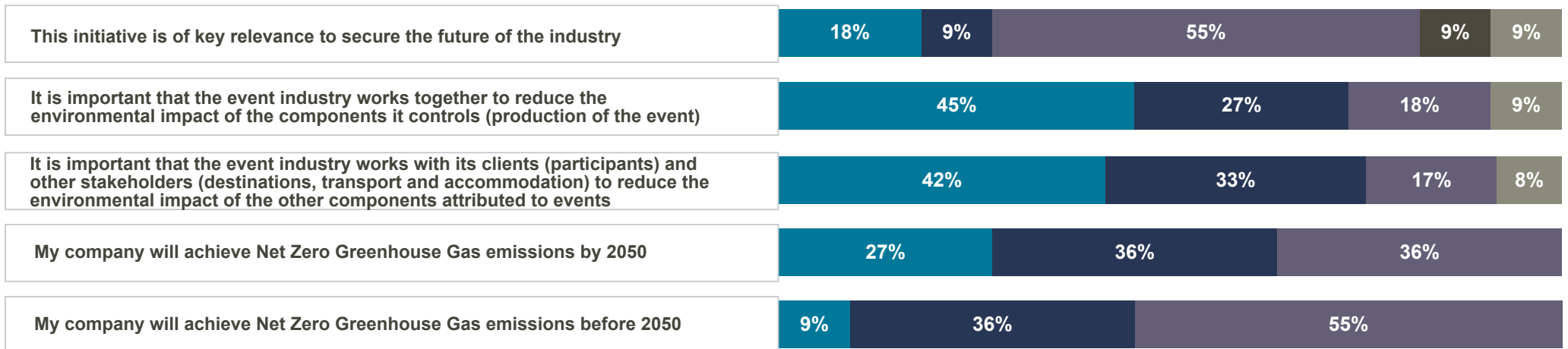
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not





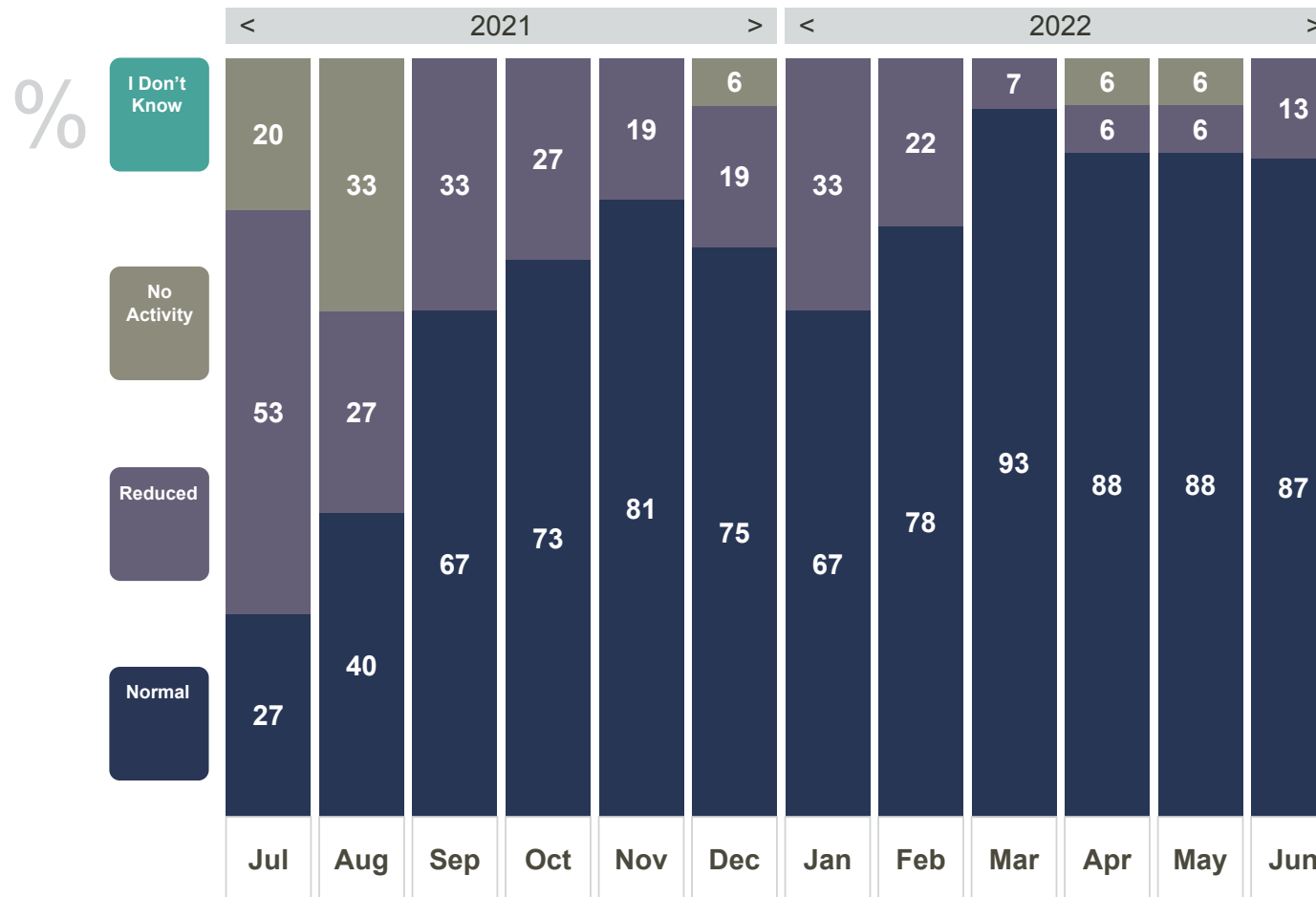
## Climate Change and Net Zero Carbon Events

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



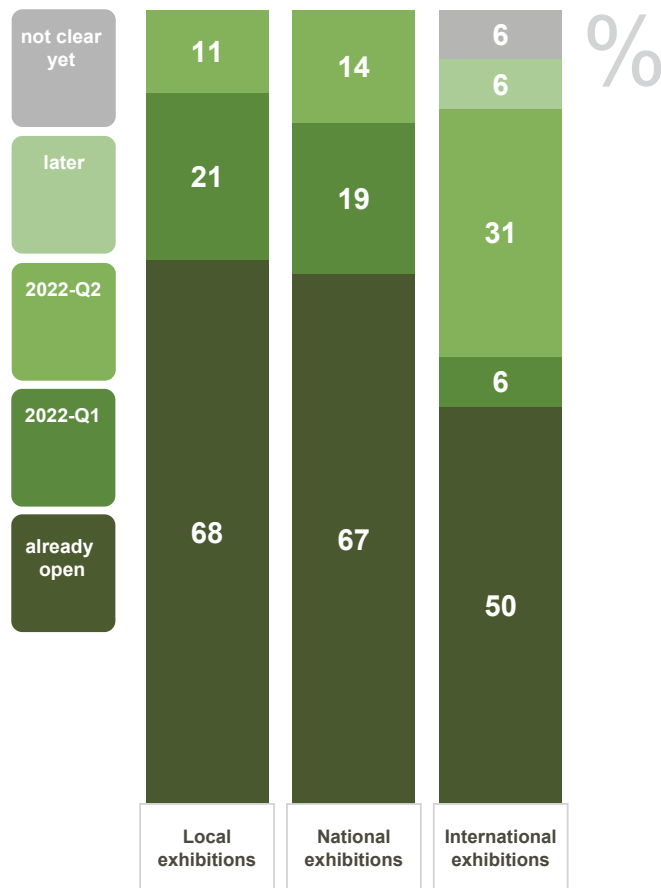


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

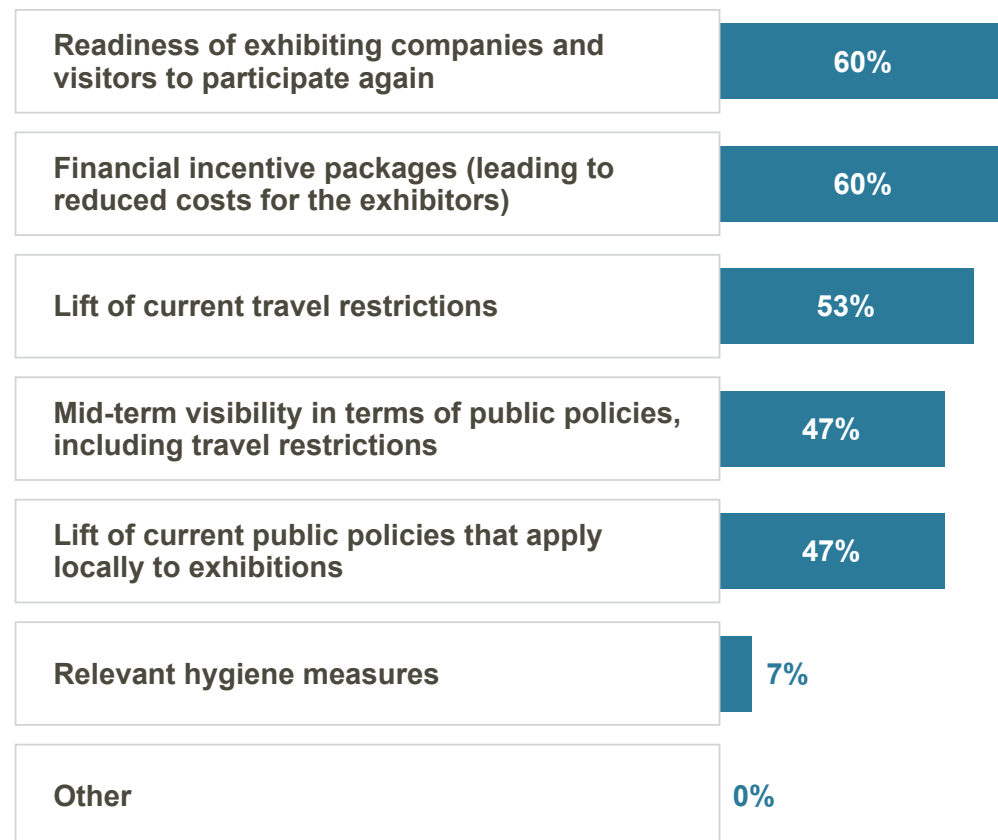




## When do you believe exhibitions will open again in your city?



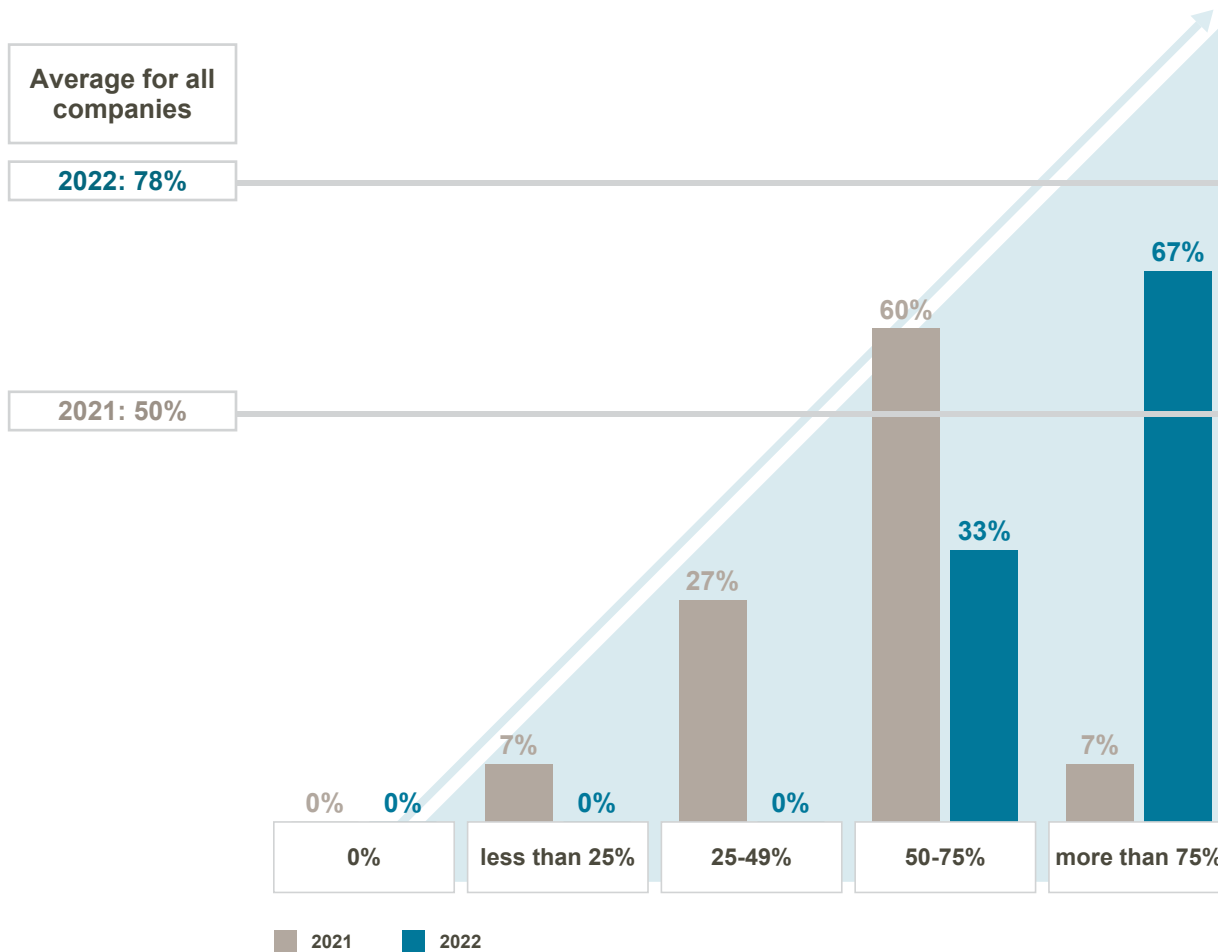
## What do you believe would most help the “bounce back” of exhibitions?



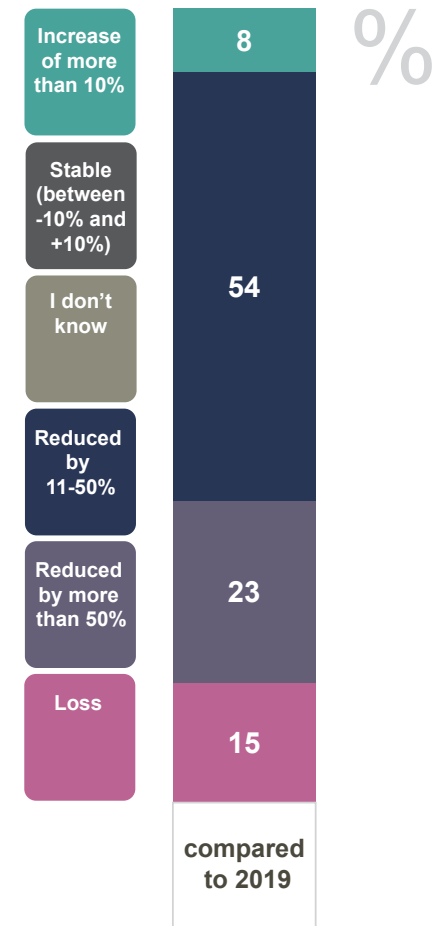
# Detailed results for Spain



## Revenue compared to 2019



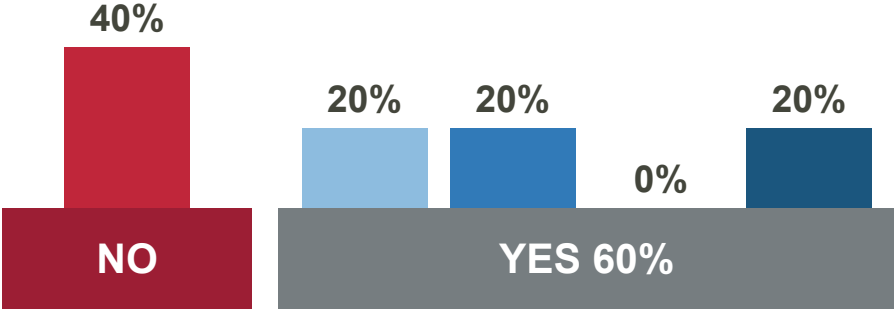
## Operating Profits 2021





## Did your company benefit from public financial support?

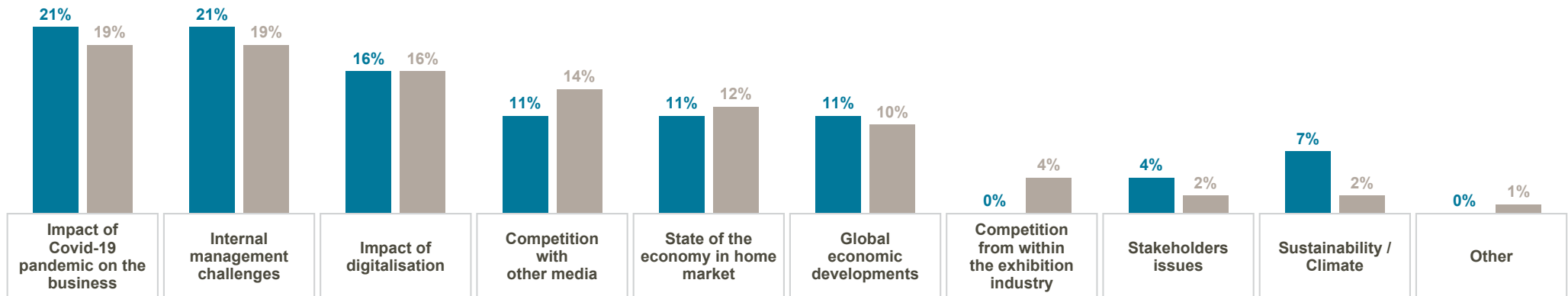
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





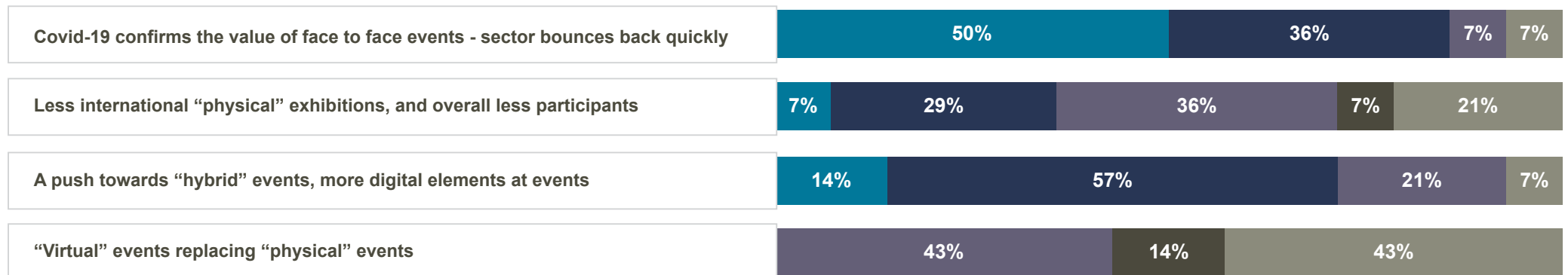
## Most important business issues in the exhibition industry

Spain Global



## Format of exhibitions in the coming years

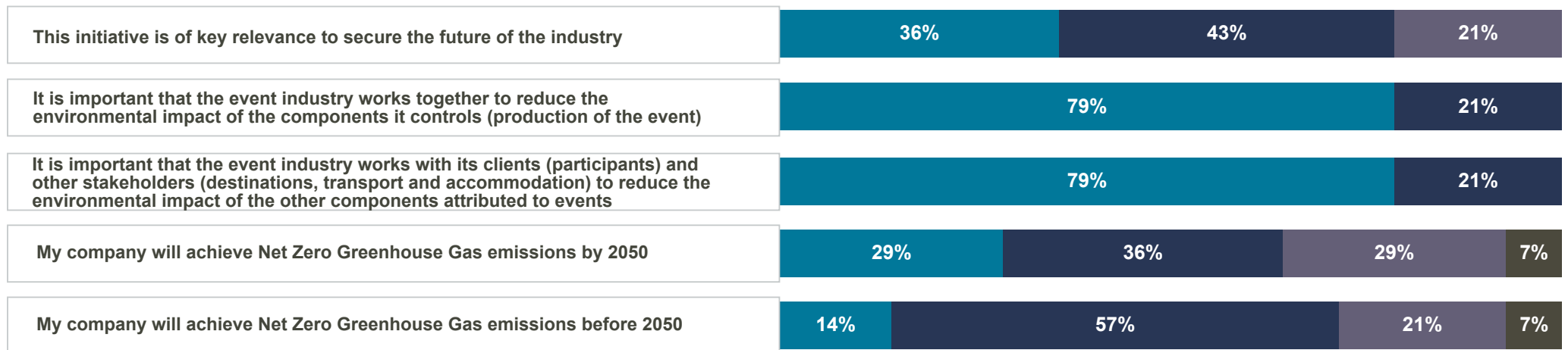
Yes, for sure Most probably Not sure Not sure at all Definitely not





## Climate Change and Net Zero Carbon Events

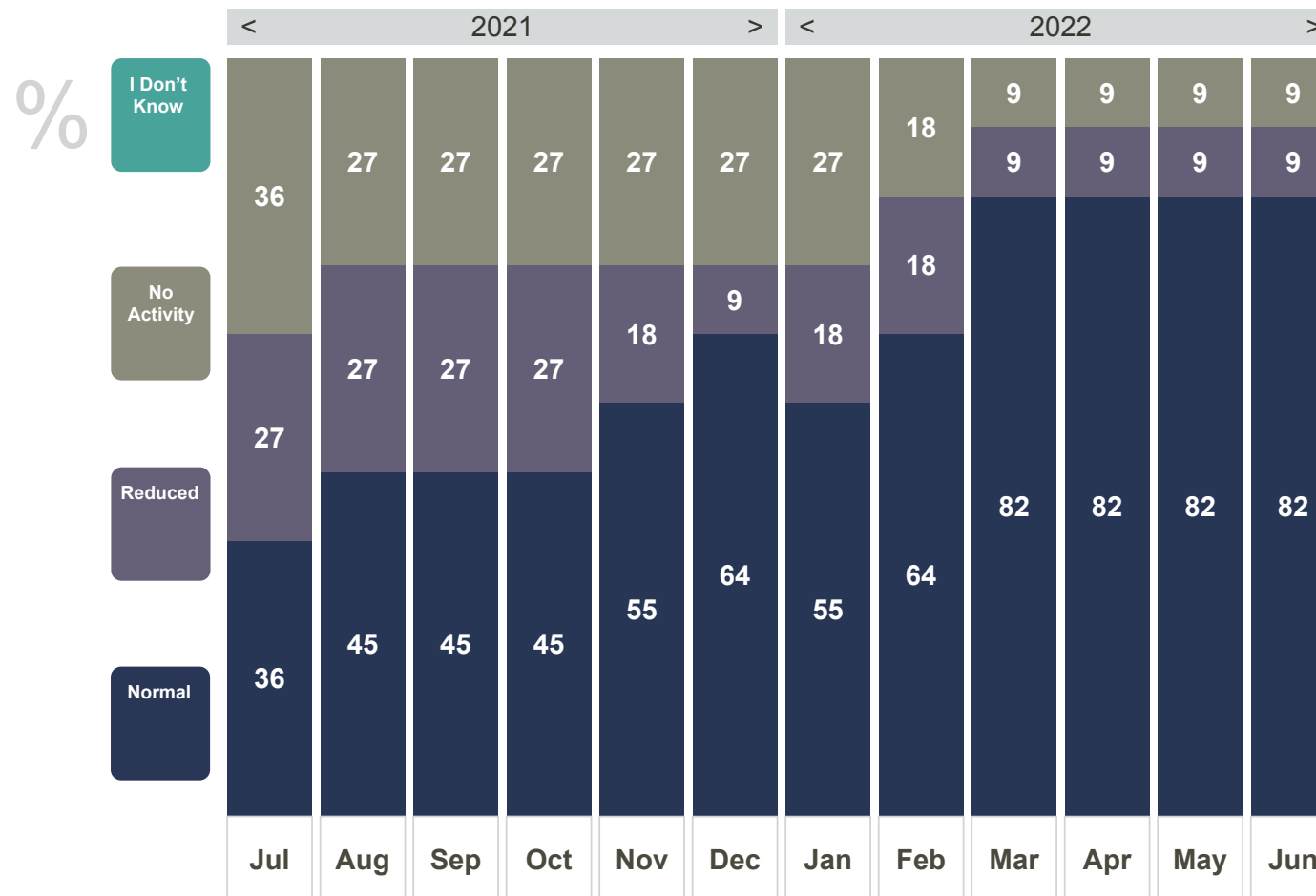
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not





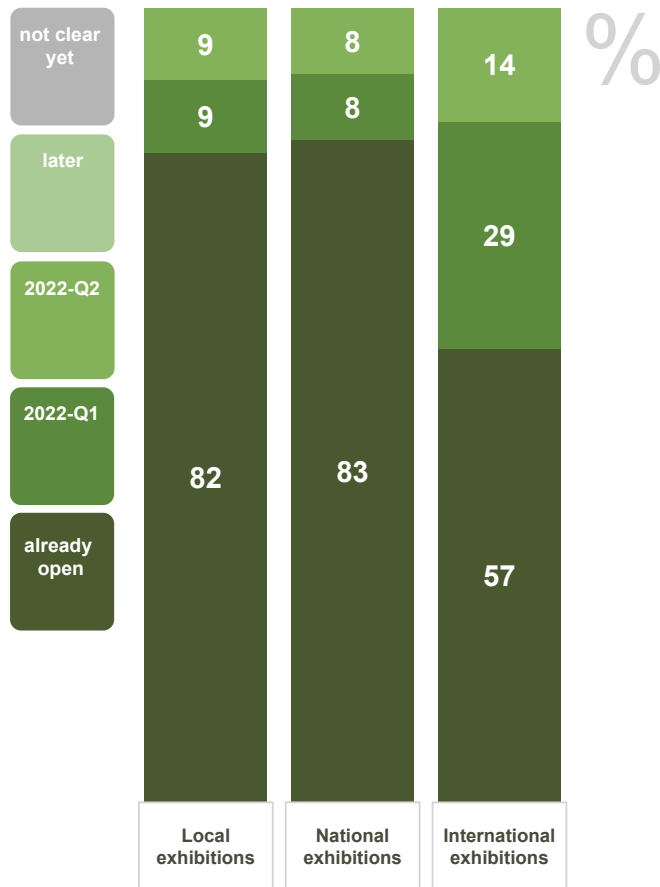


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

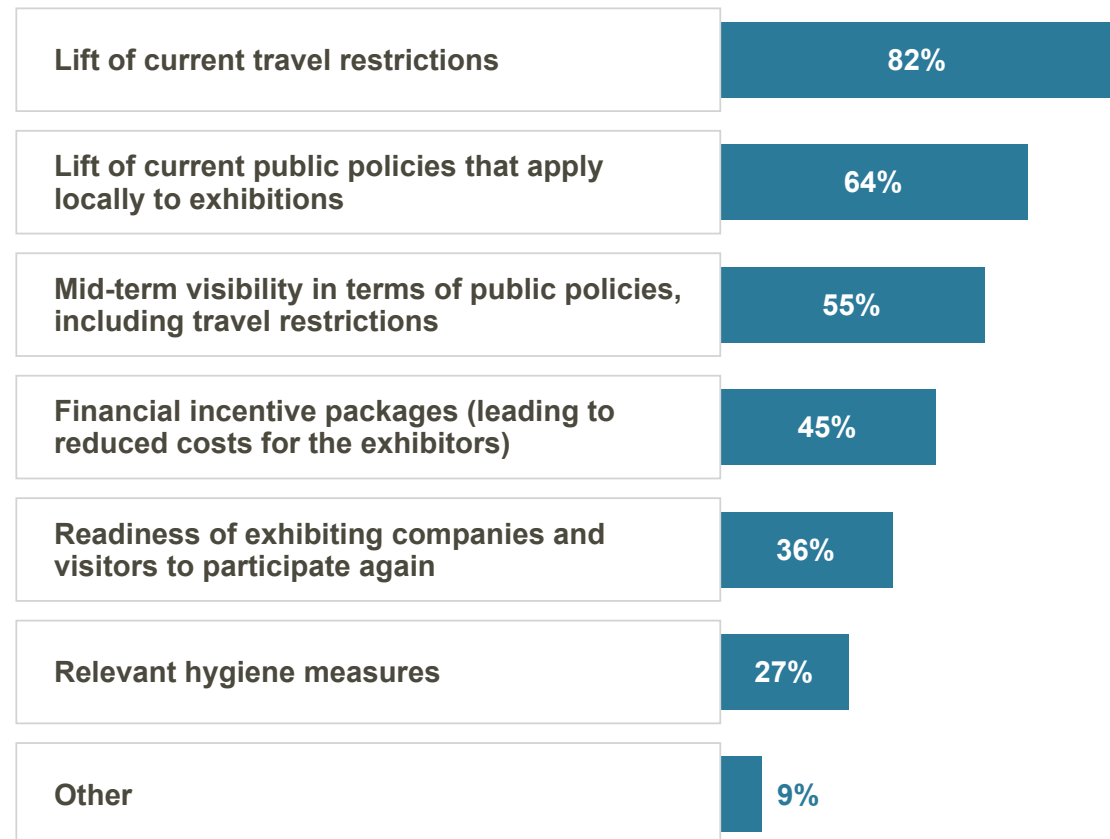




## When do you believe exhibitions will open again in your city?

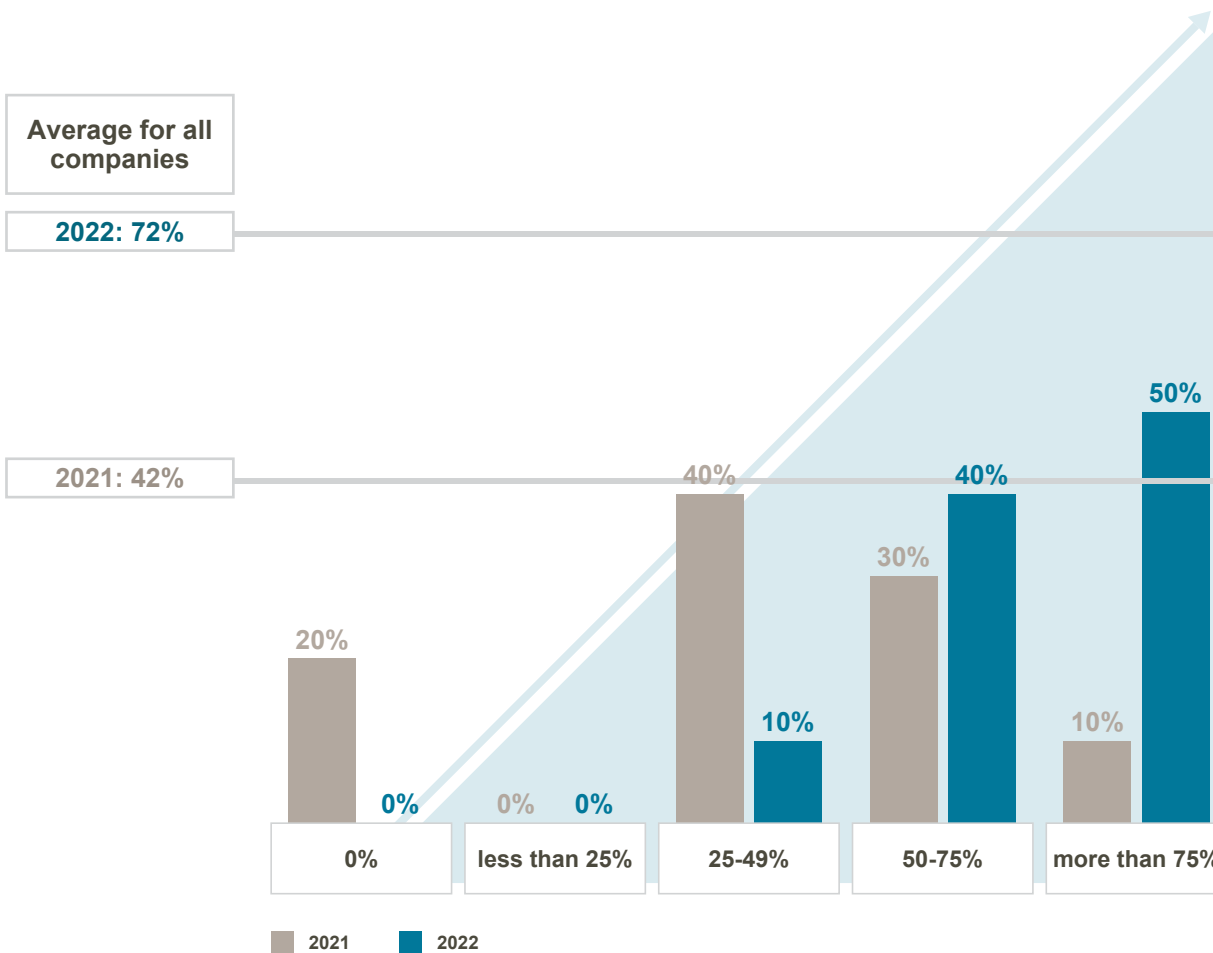


## What do you believe would most help the “bounce back” of exhibitions?

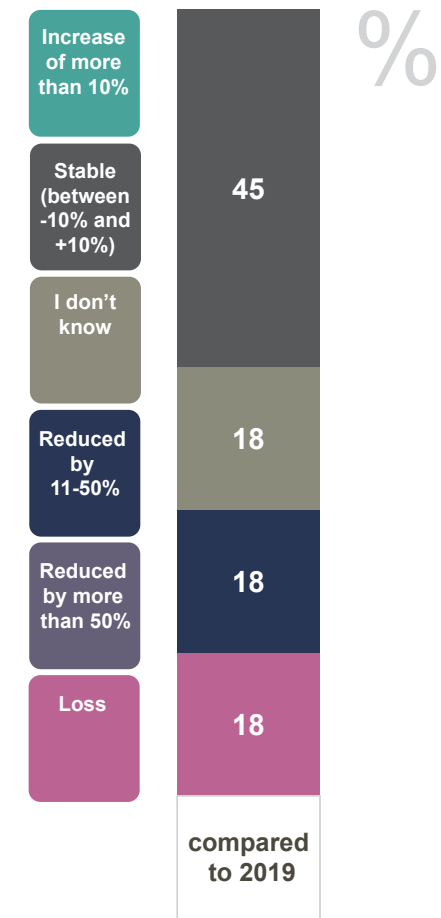




## Revenue compared to 2019

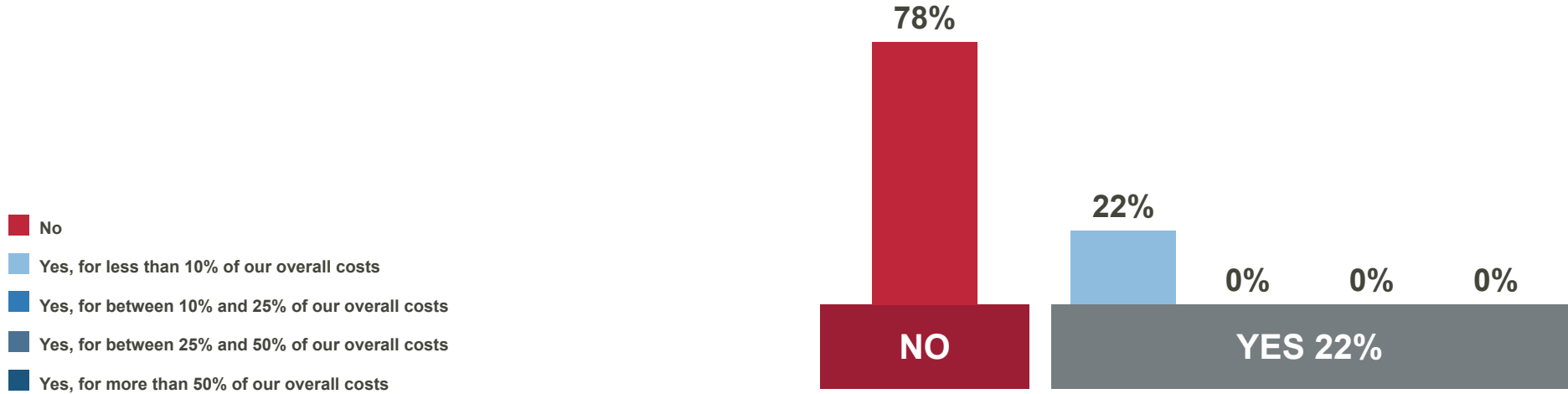


## Operating Profits 2021





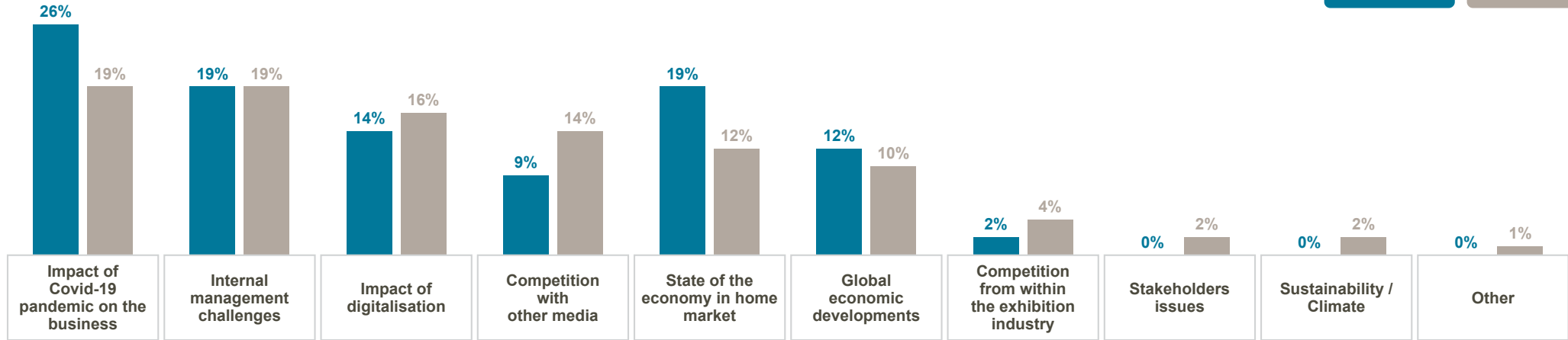
## Did your company benefit from public financial support?





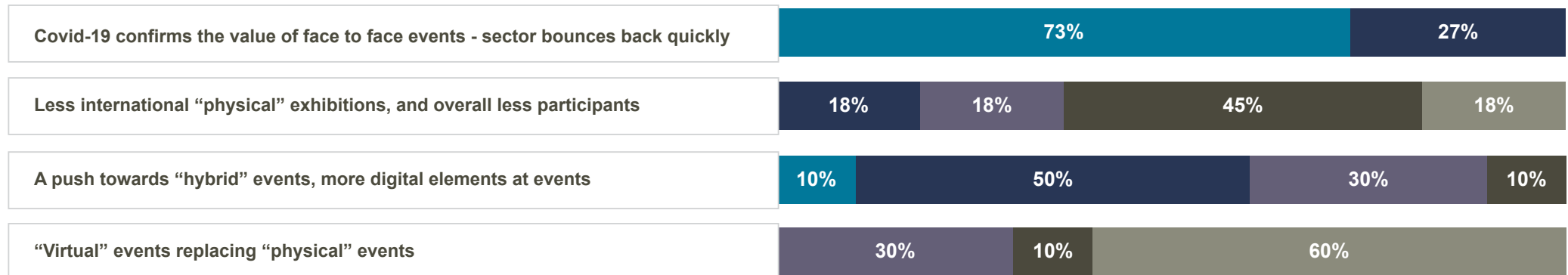
## Most important business issues in the exhibition industry

Turkey Global



## Format of exhibitions in the coming years

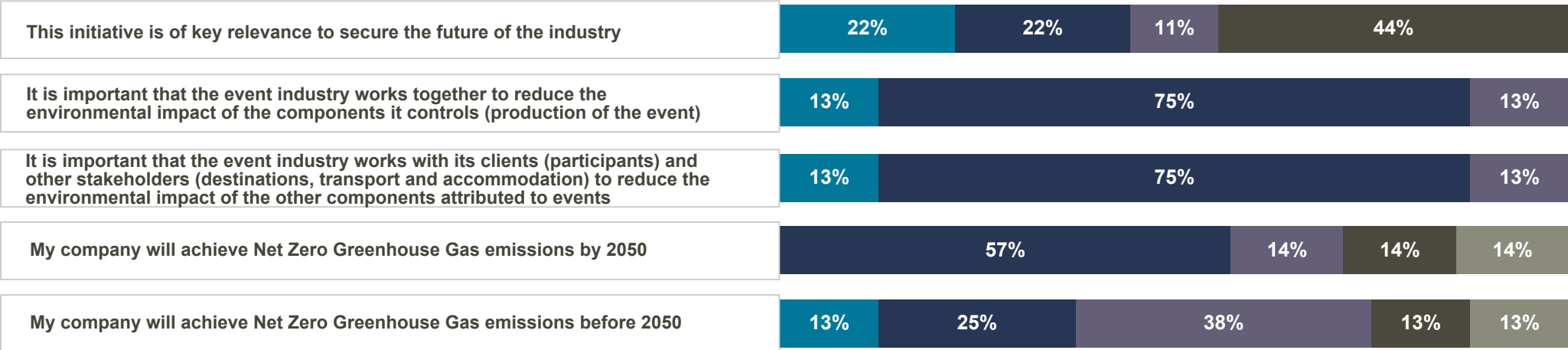
Yes, for sure Most probably Not sure Not sure at all Definitely not

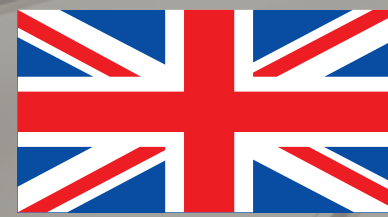




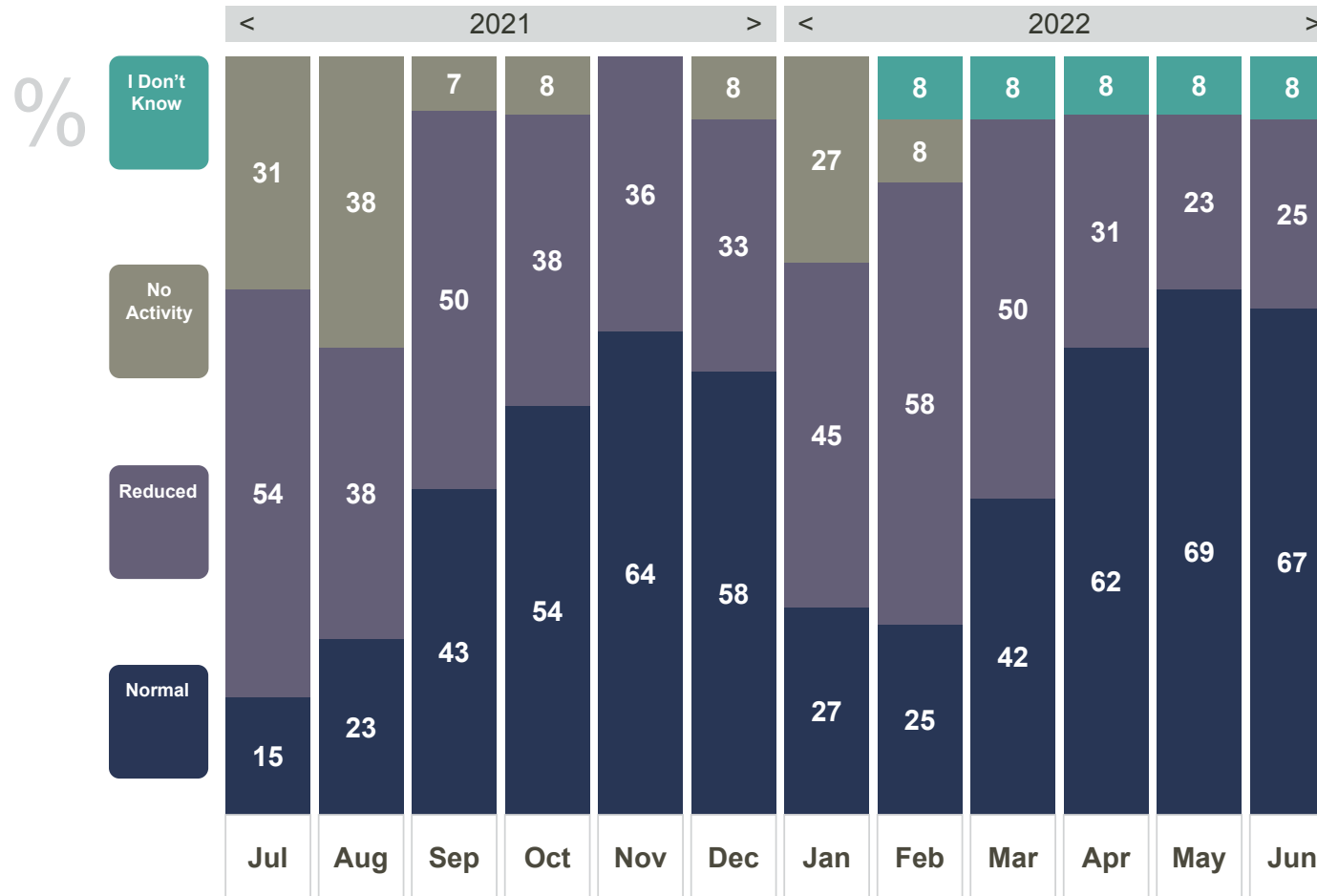
## Climate Change and Net Zero Carbon Events

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



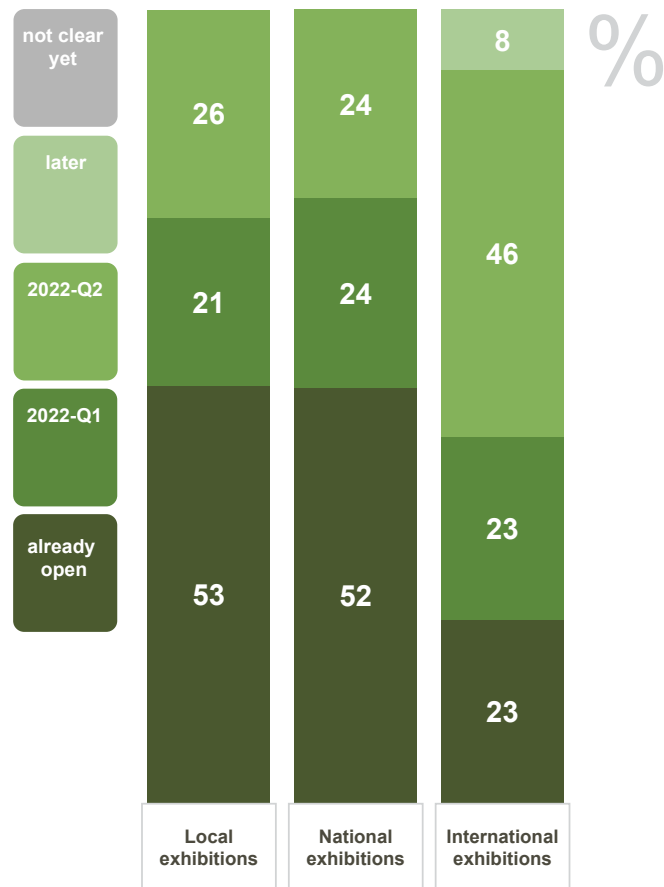


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

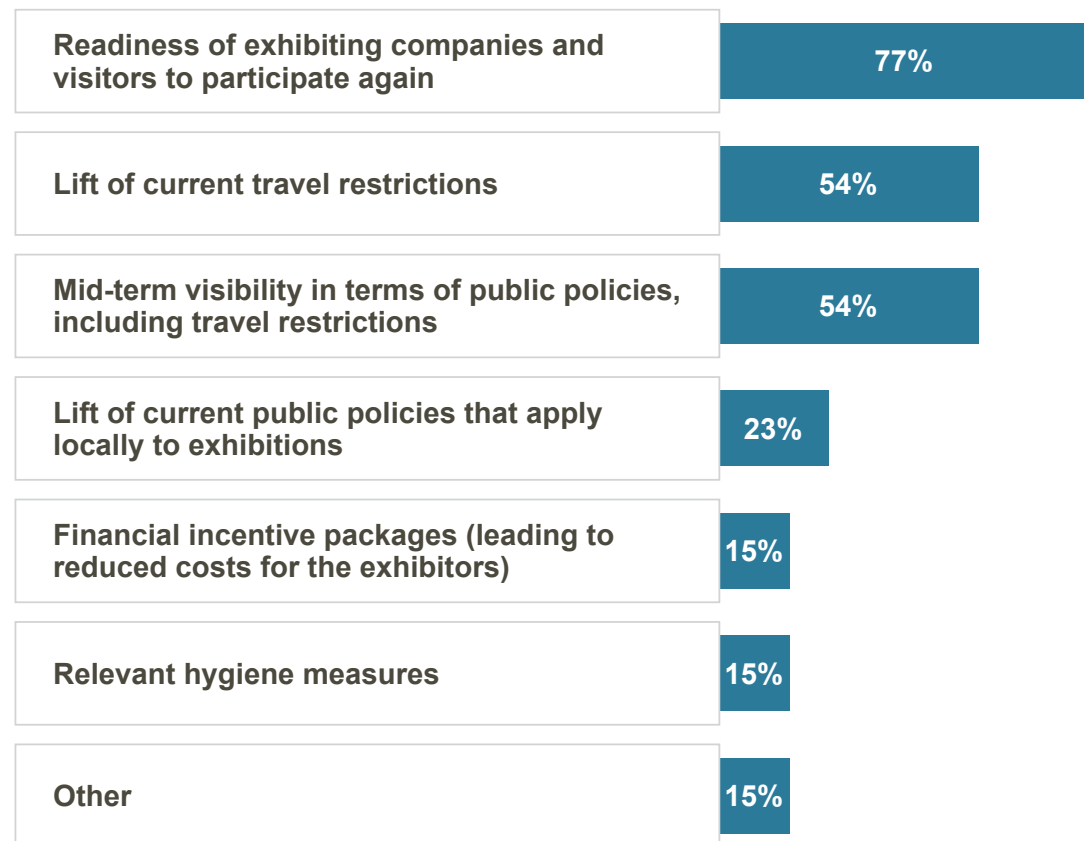




## When do you believe exhibitions will open again in your city?



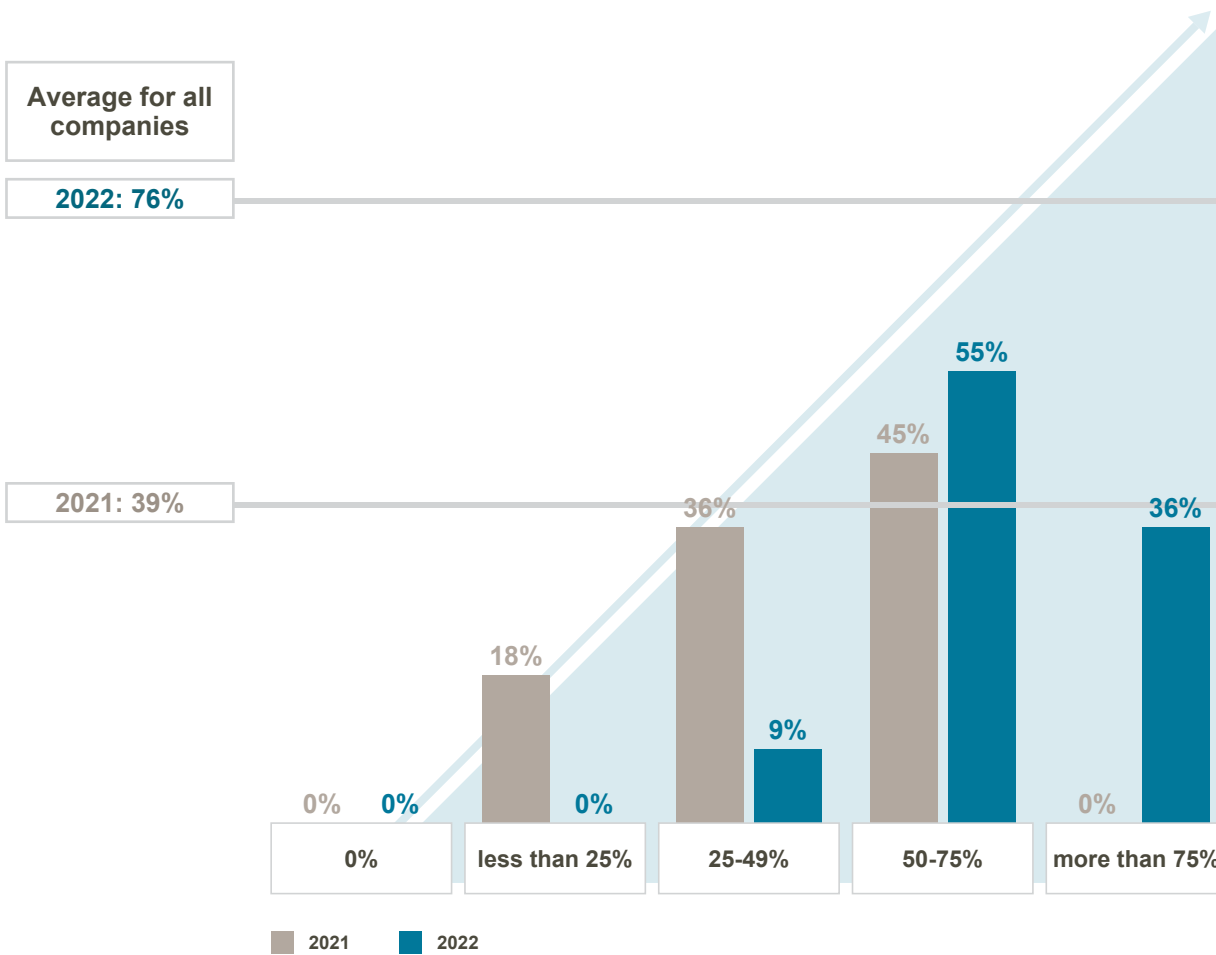
## What do you believe would most help the “bounce back” of exhibitions?



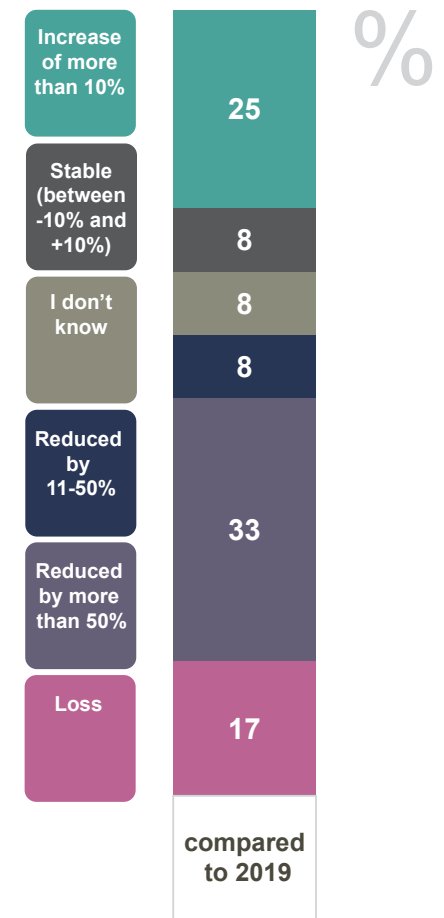




## Revenue compared to 2019



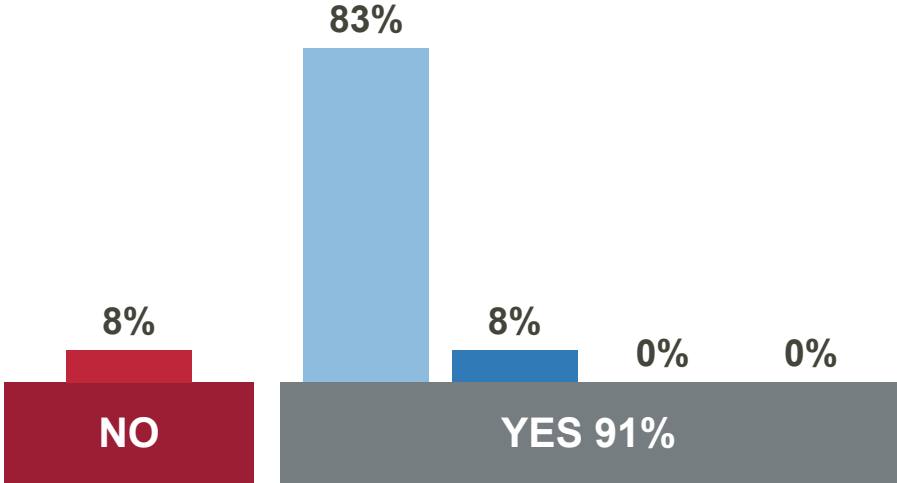
## Operating Profits 2021





## Did your company benefit from public financial support?

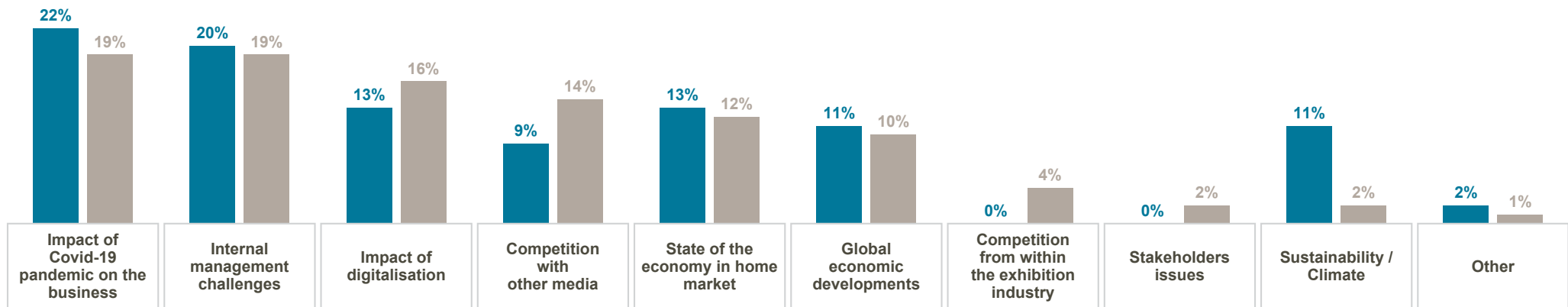
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





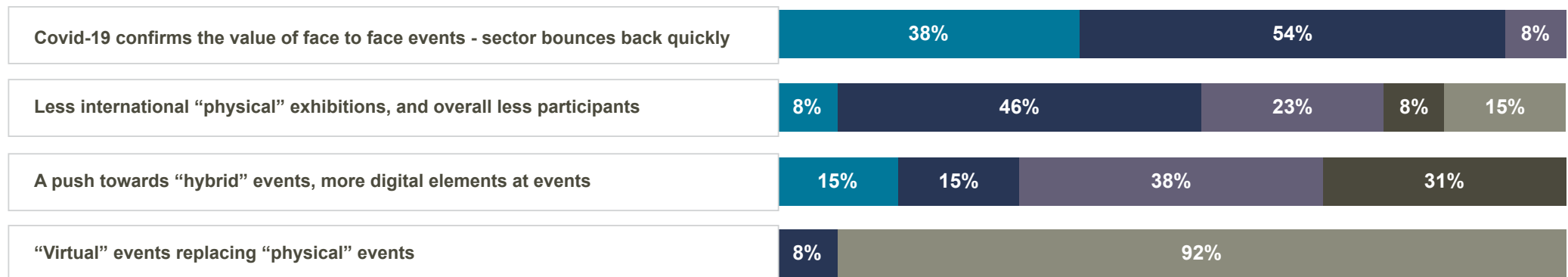
## Most important business issues in the exhibition industry

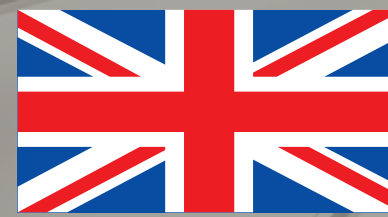
UK Global



## Format of exhibitions in the coming years

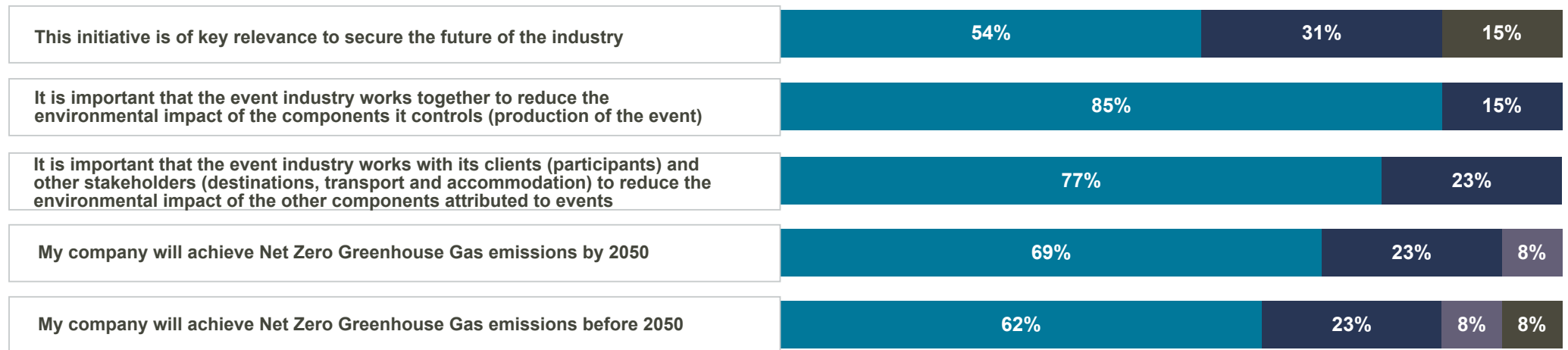
Yes, for sure Most probably Not sure Not sure at all Definitely not





## Climate Change and Net Zero Carbon Events

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



# Middle East & Africa



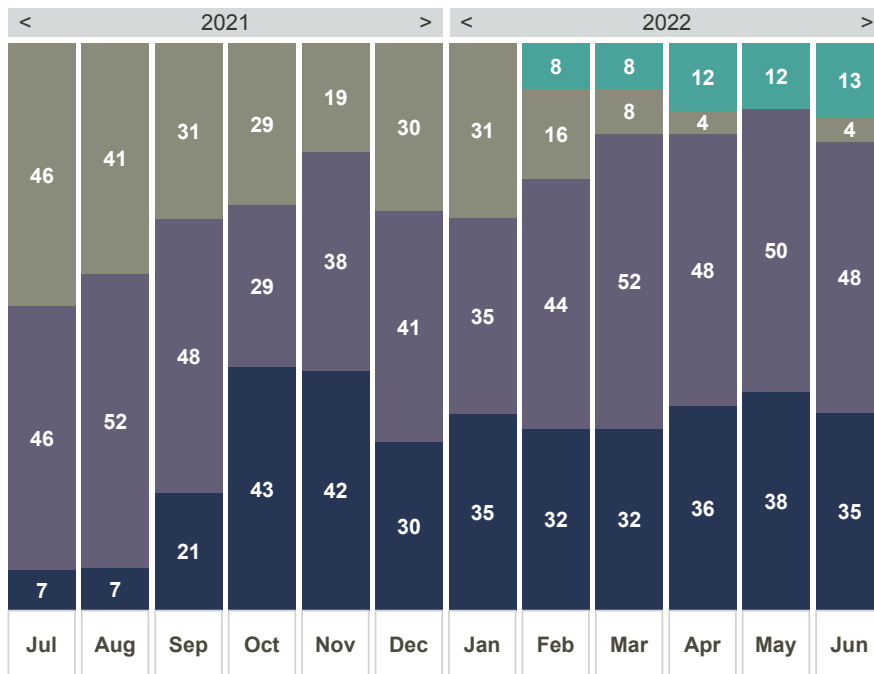
# Operations - Reopening Exhibitions Middle East & Africa



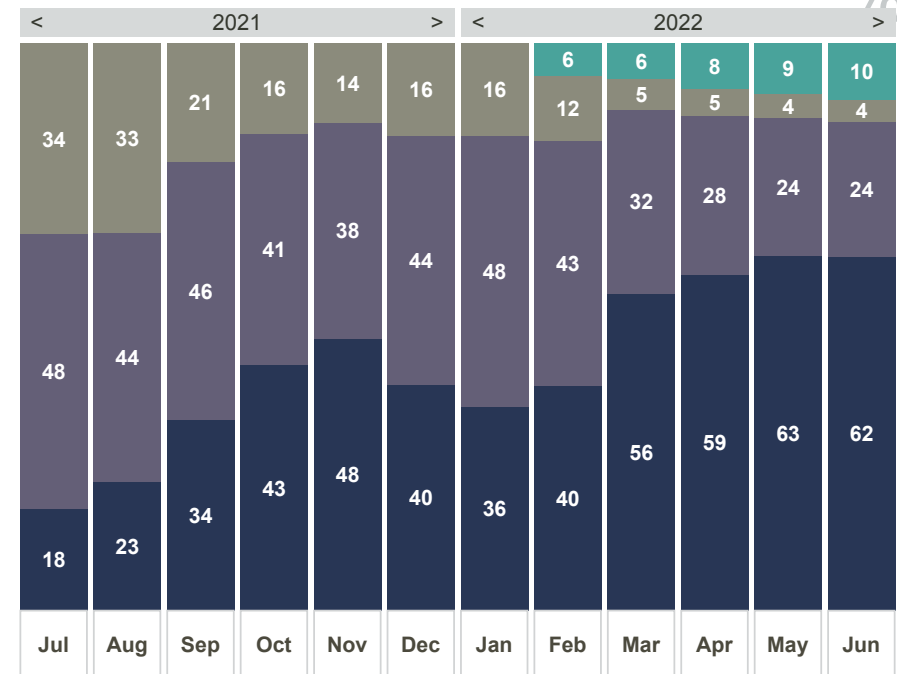
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



## Middle East & Africa



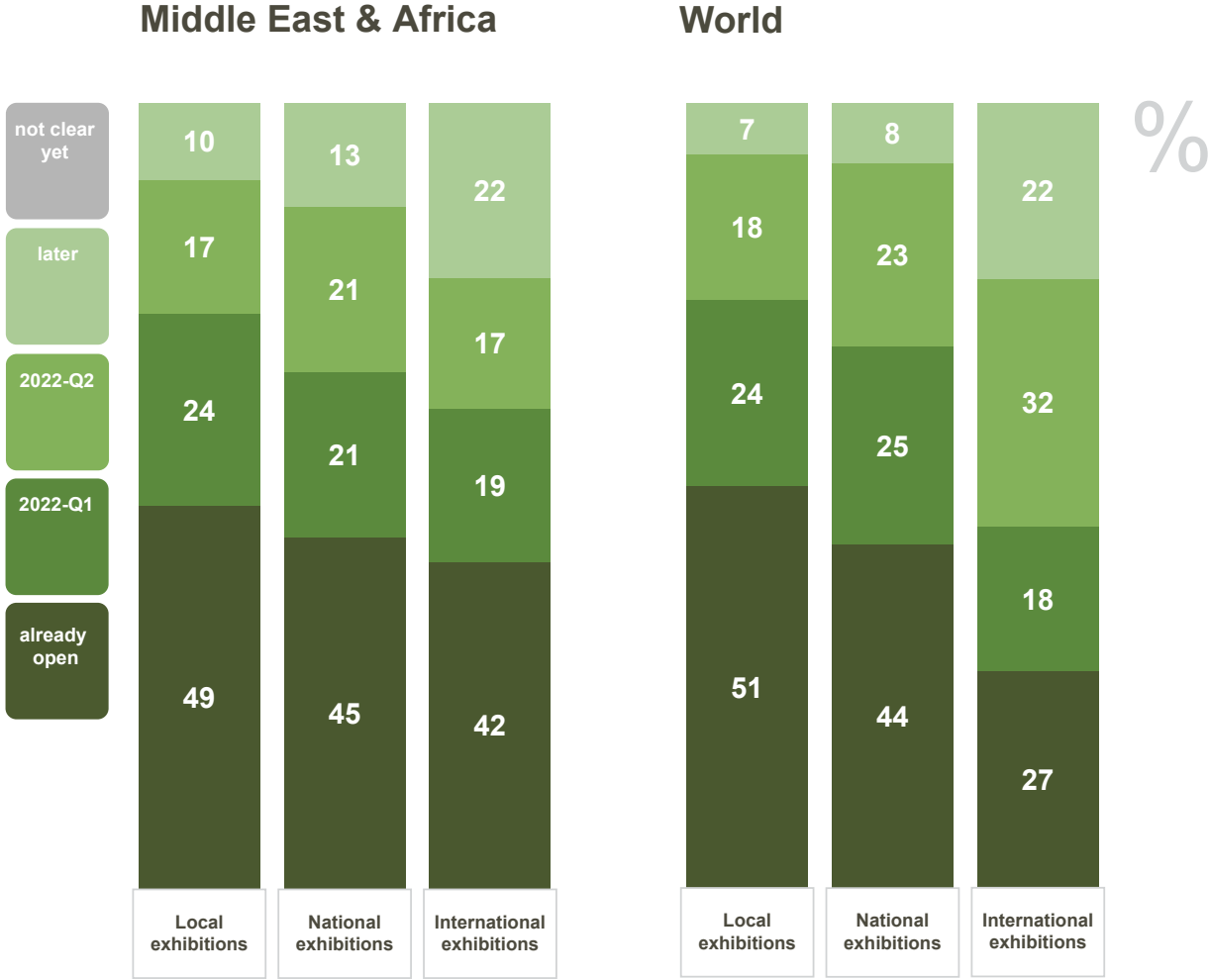
## World



# Operations - Reopening Exhibitions Middle East & Africa



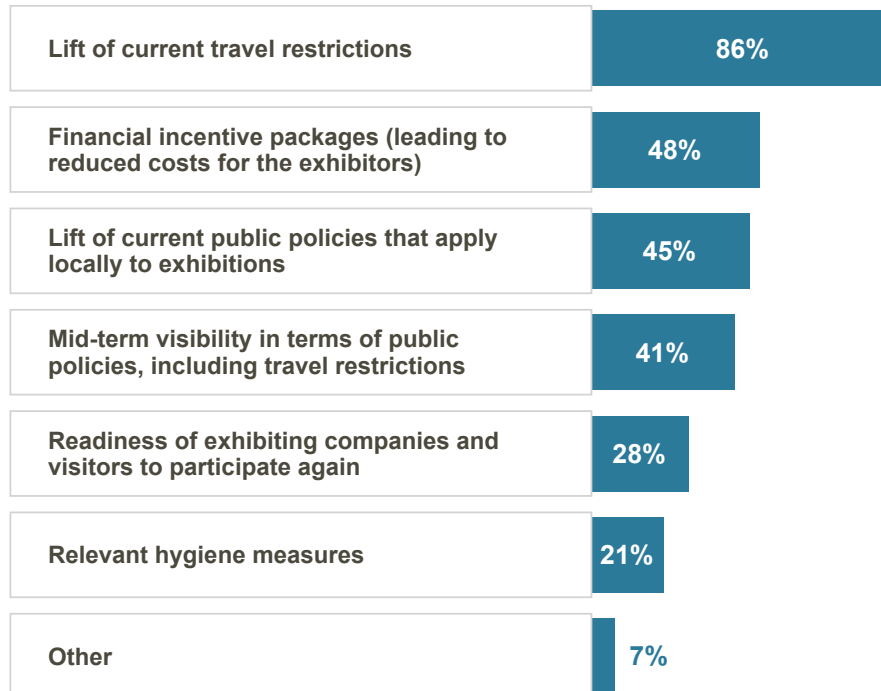
When do you believe exhibitions will open again in your city?



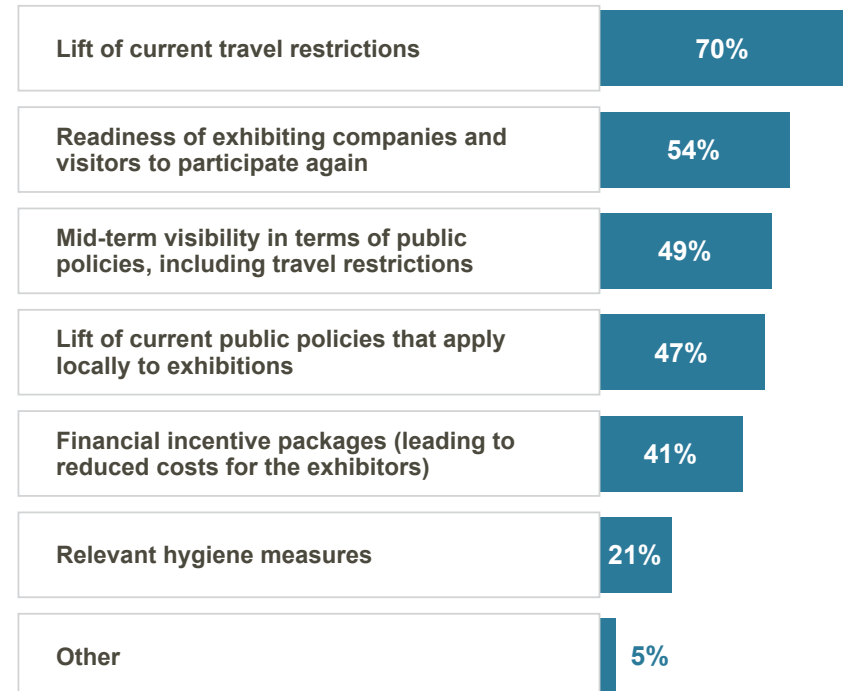


## What do you believe would most help the “bounce back” of exhibitions?

### Middle East & Africa



### World

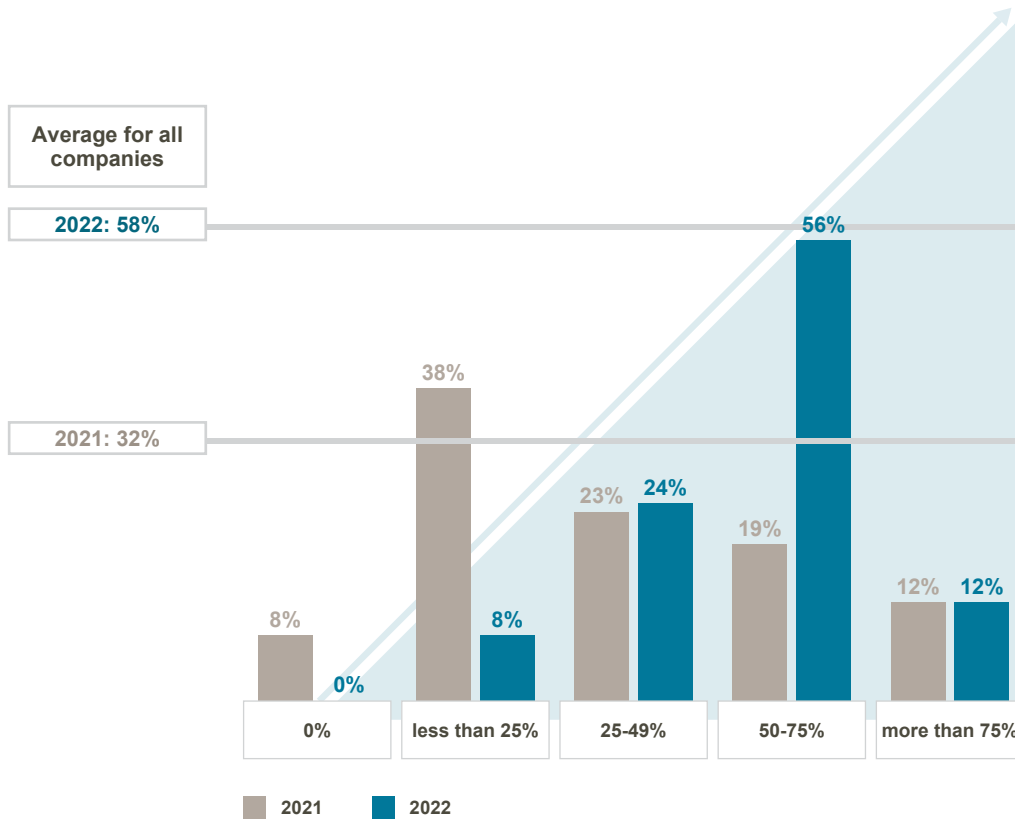




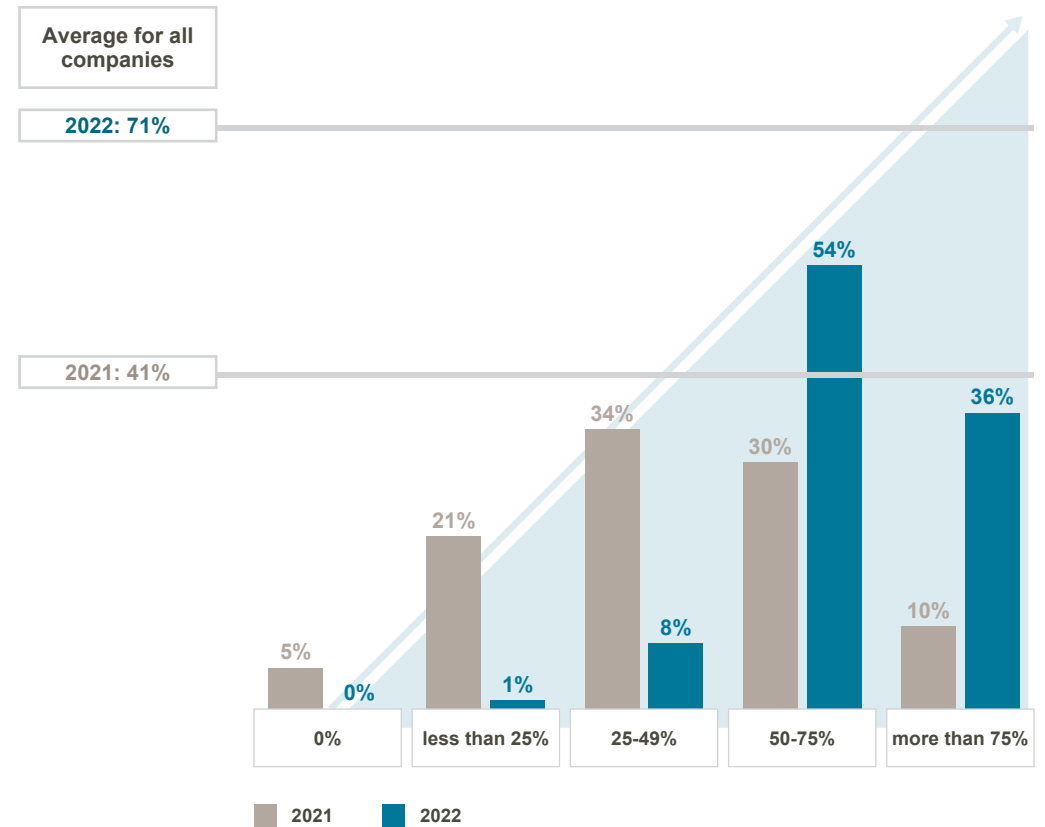


## Revenue compared to 2019

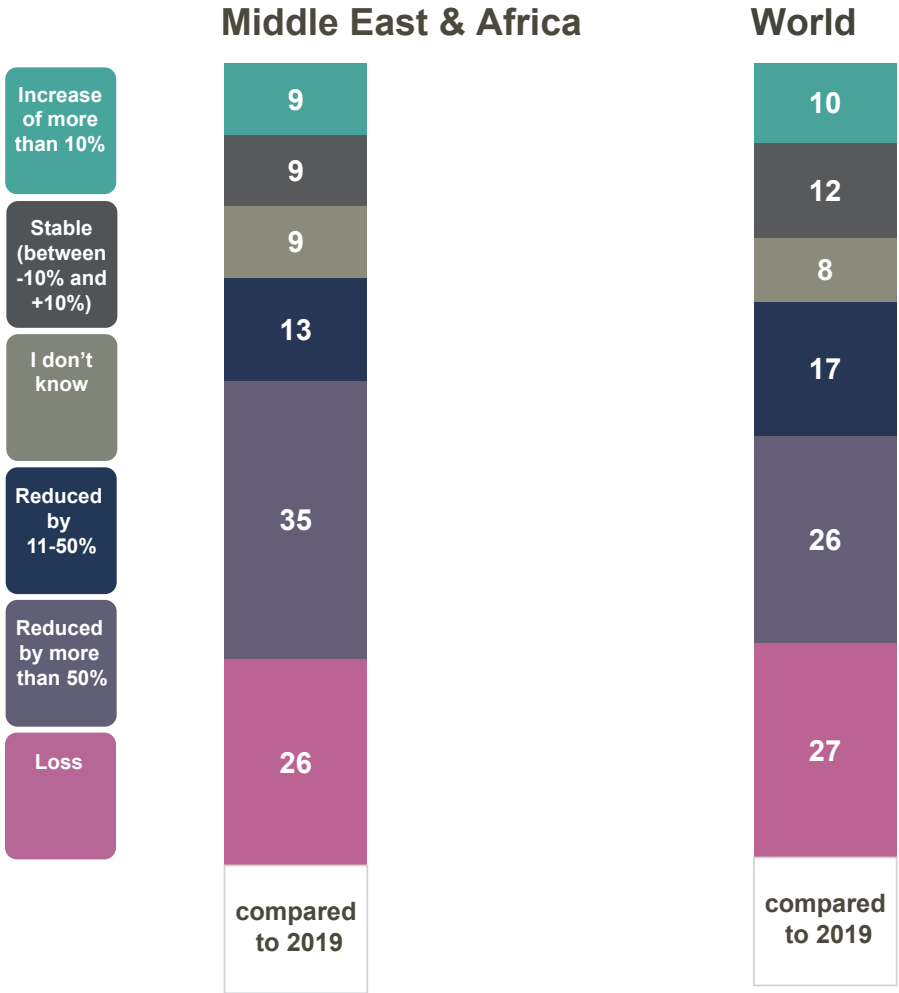
### Middle East & Africa



### World



# Operating profit 2019 Middle East & Africa



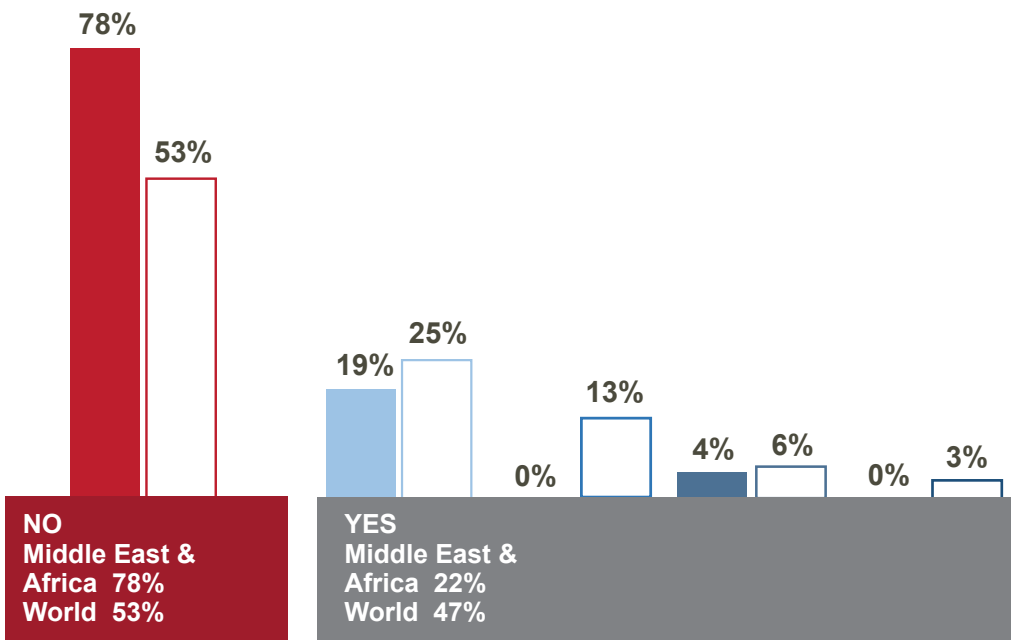
%



## Did your company benefit from public financial support?

Middle East & Africa
  World

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

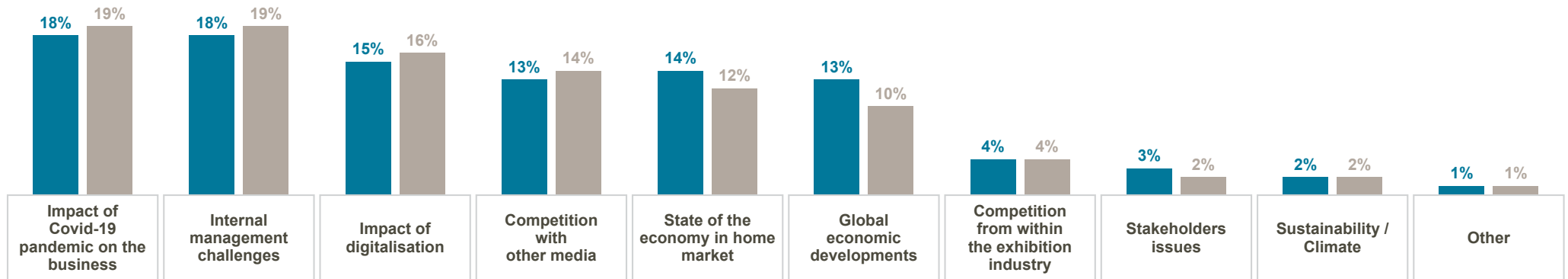


# Most Important Business Issues - Format of Exhibitions - Middle East & Africa



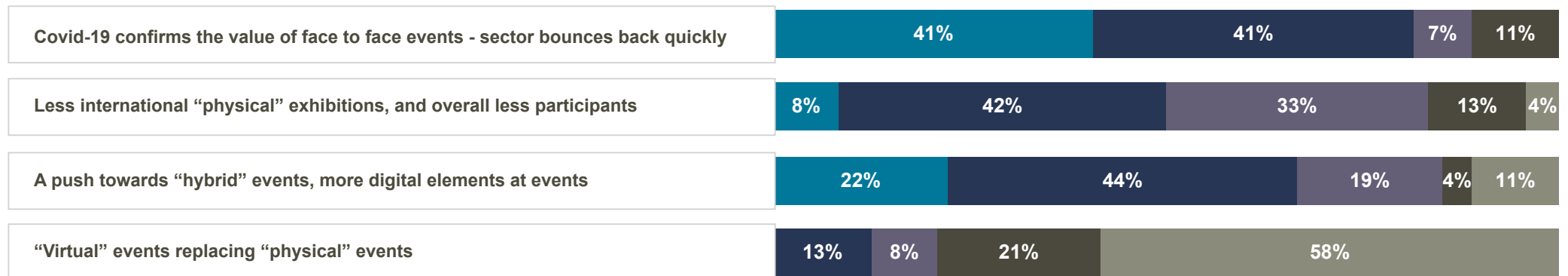
## Most important business issues in the exhibition industry

Middle East & Africa Global



## Format of exhibitions in the coming years

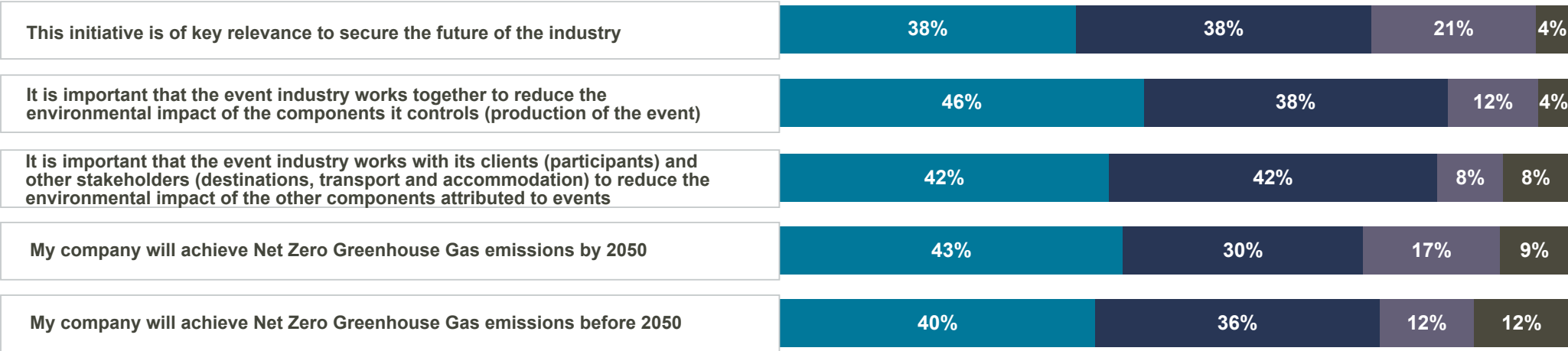
Yes, for sure Most probably Not sure Not sure at all Definitely not





## Climate Change and Net Zero Carbon Events

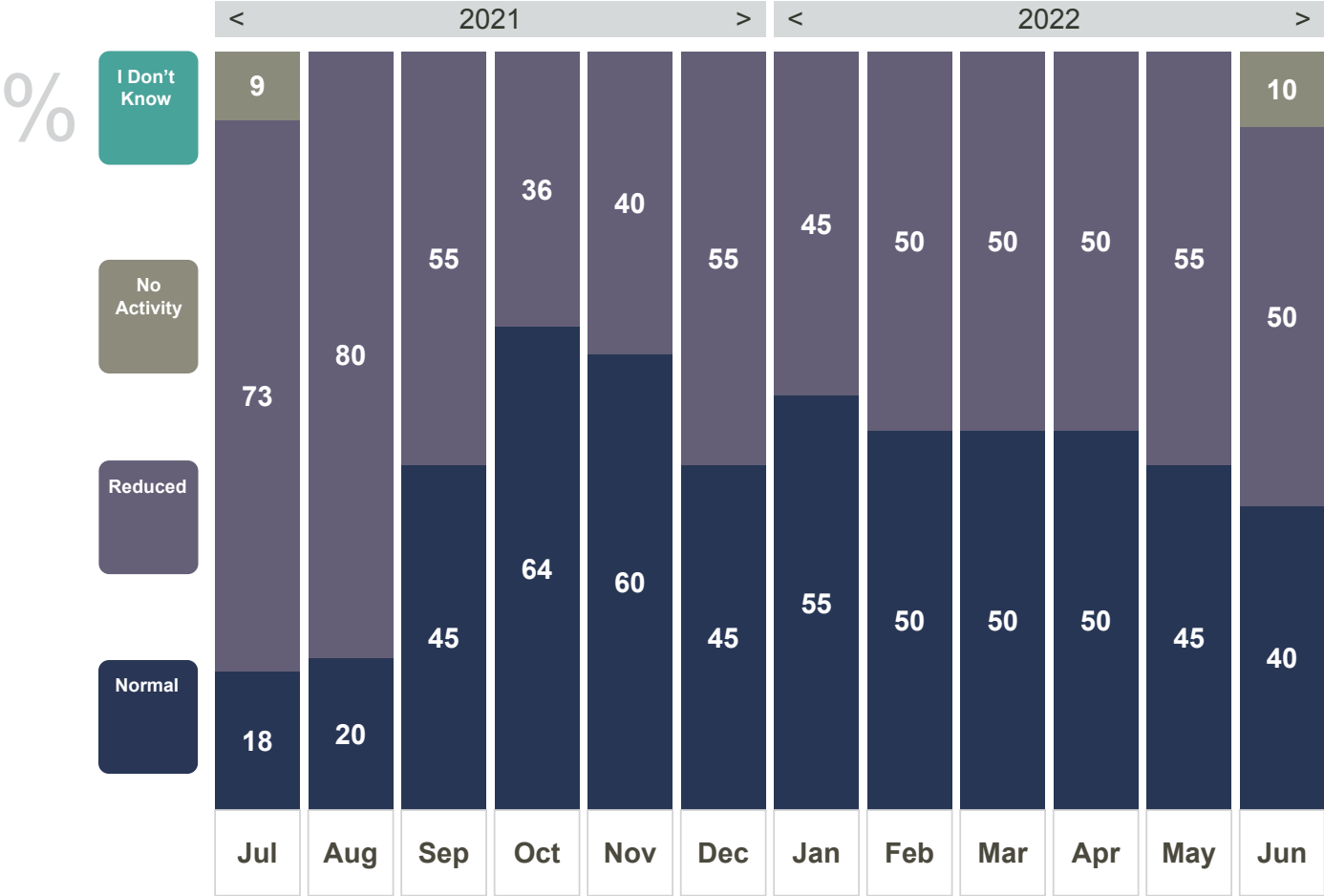
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not



# Detailed results for United Arab Emirates

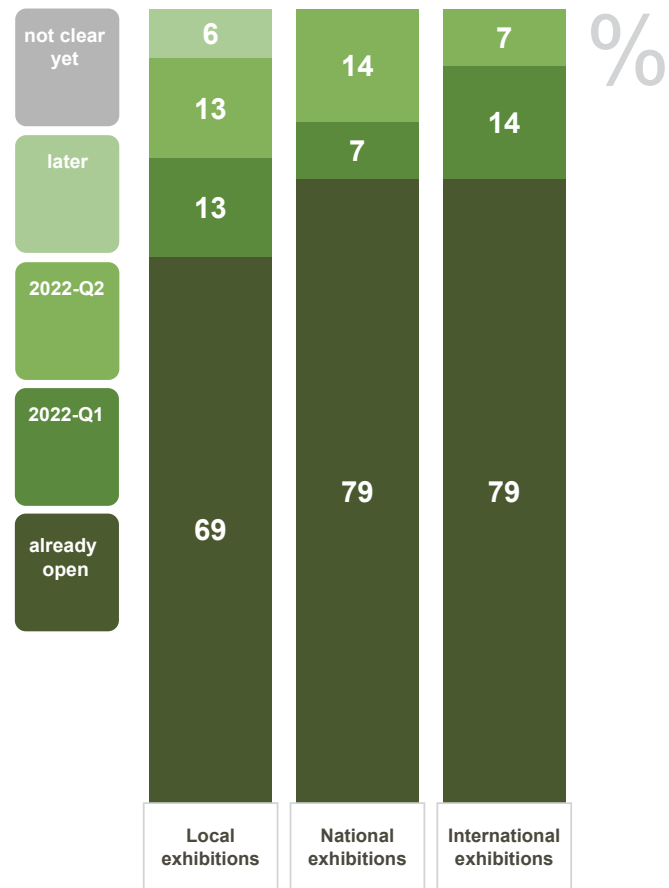


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

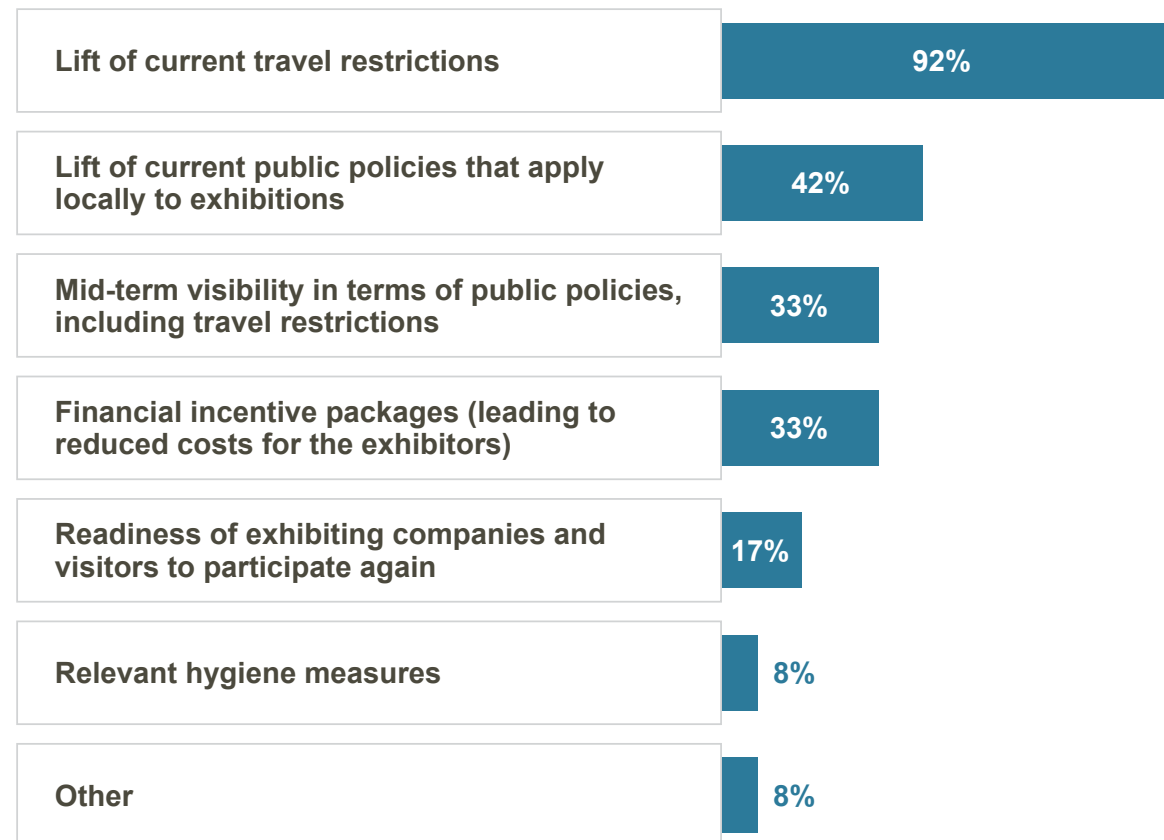




## When do you believe exhibitions will open again in your city?



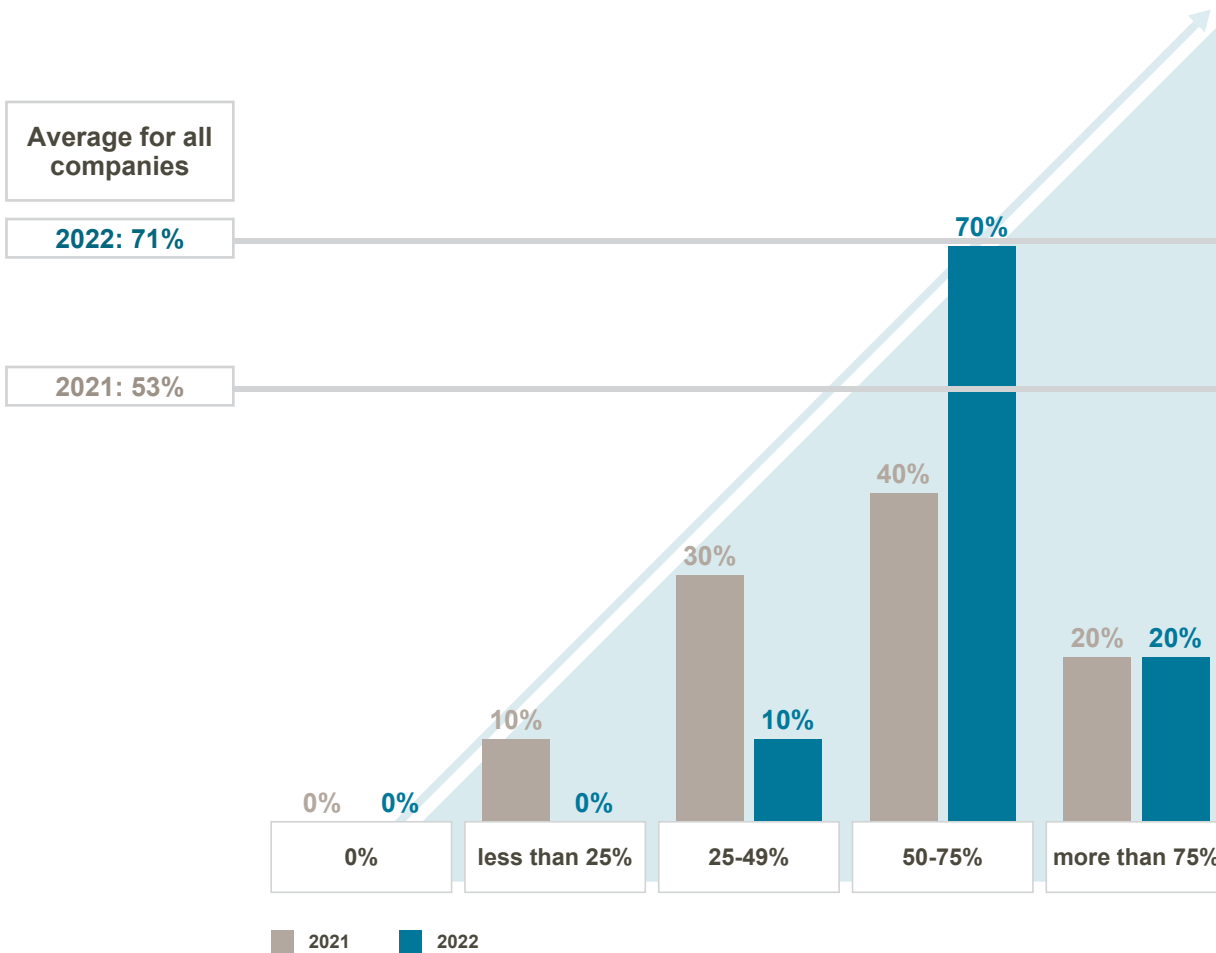
## What do you believe would most help the “bounce back” of exhibitions?



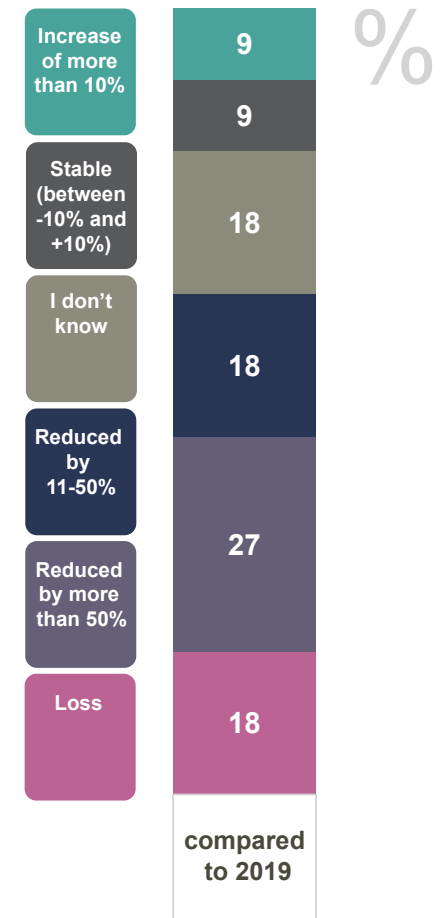
# Detailed results for United Arab Emirates



## Revenue compared to 2019



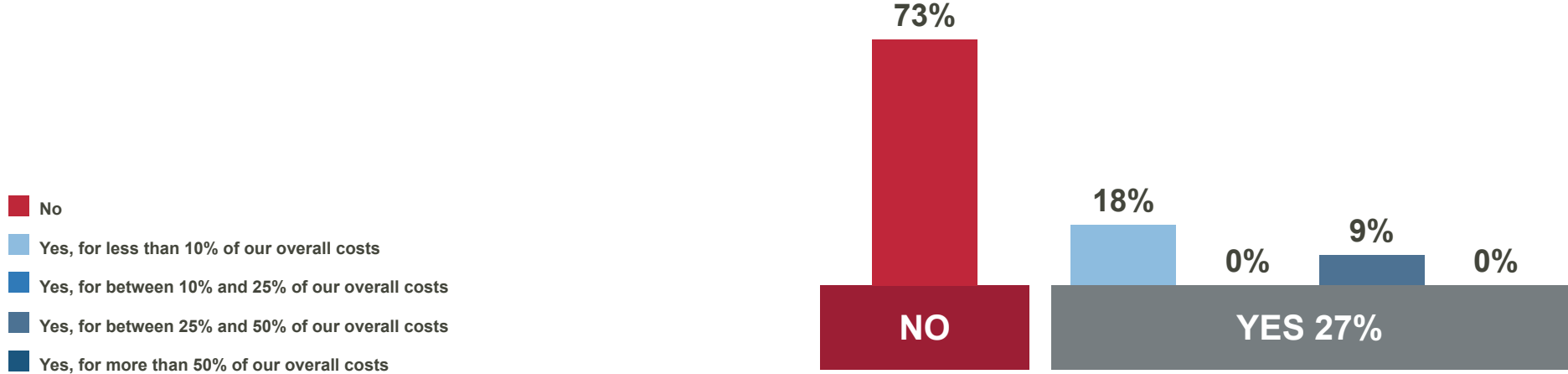
## Operating Profits 2021







## Did your company benefit from public financial support?

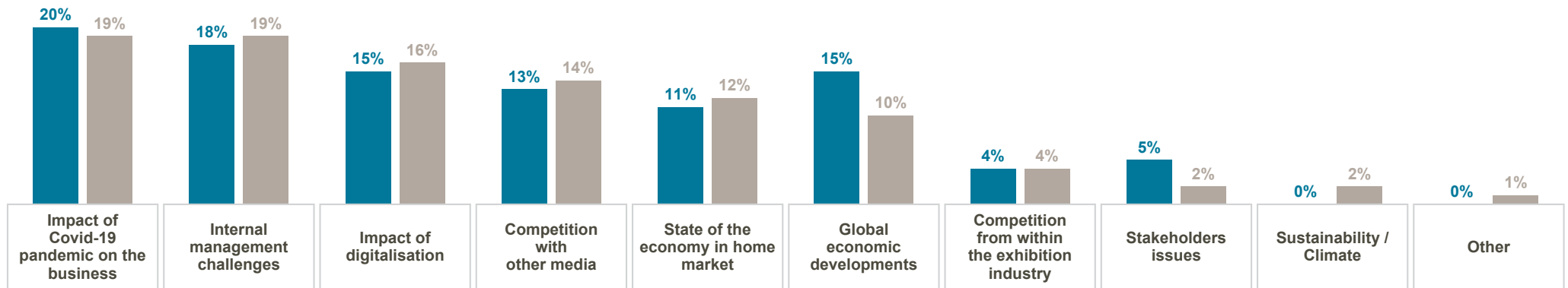




## Most important business issues in the exhibition industry

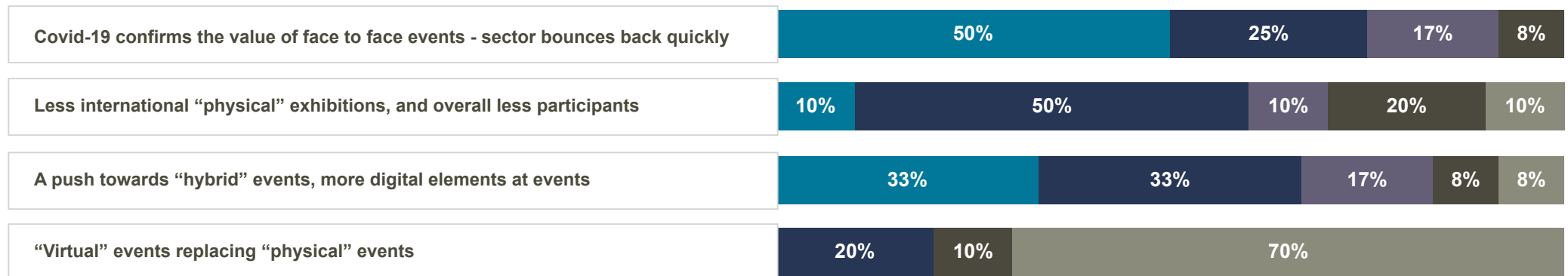
United Arab Emirates

Global



## Format of exhibitions in the coming years

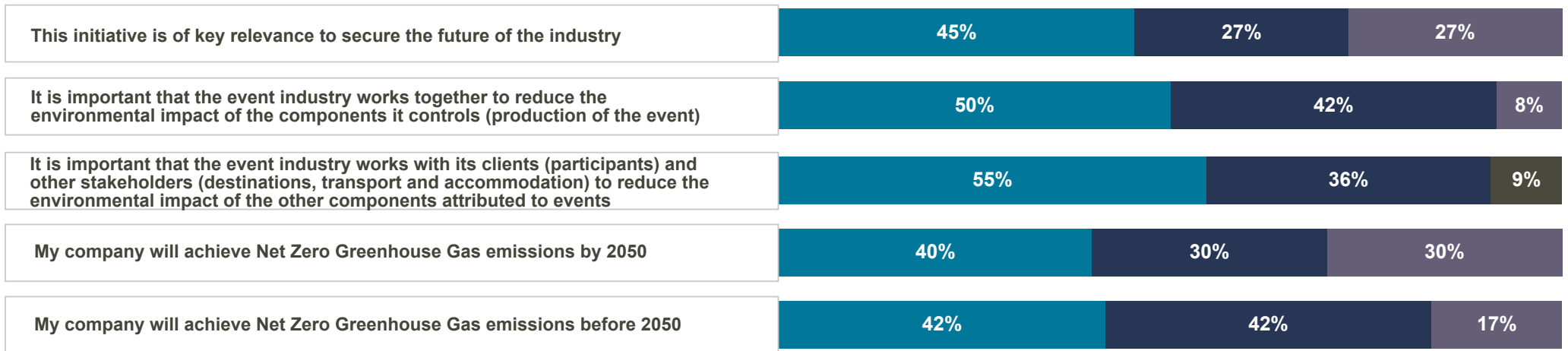
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not





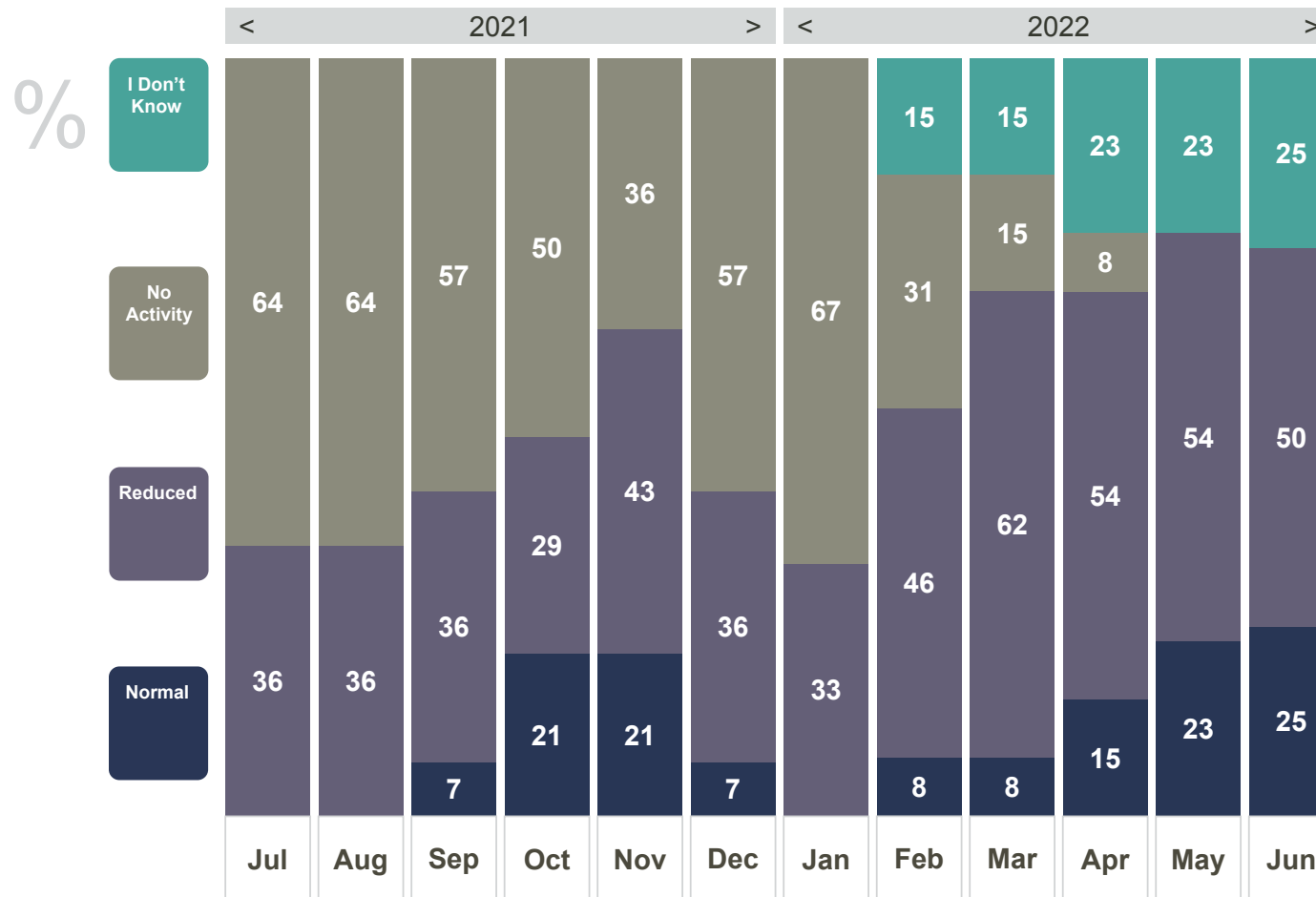
## Climate Change and Net Zero Carbon Events

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



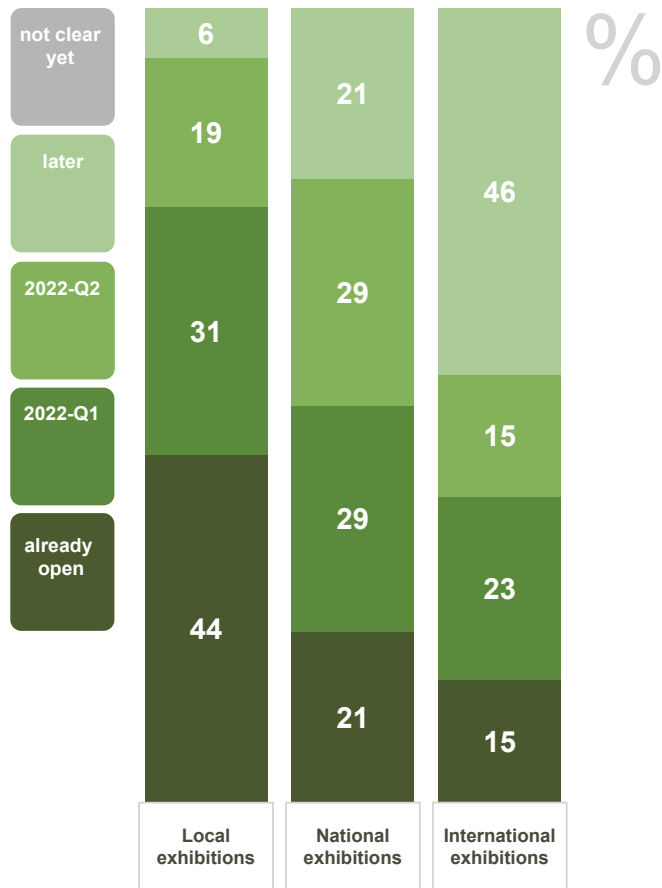


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

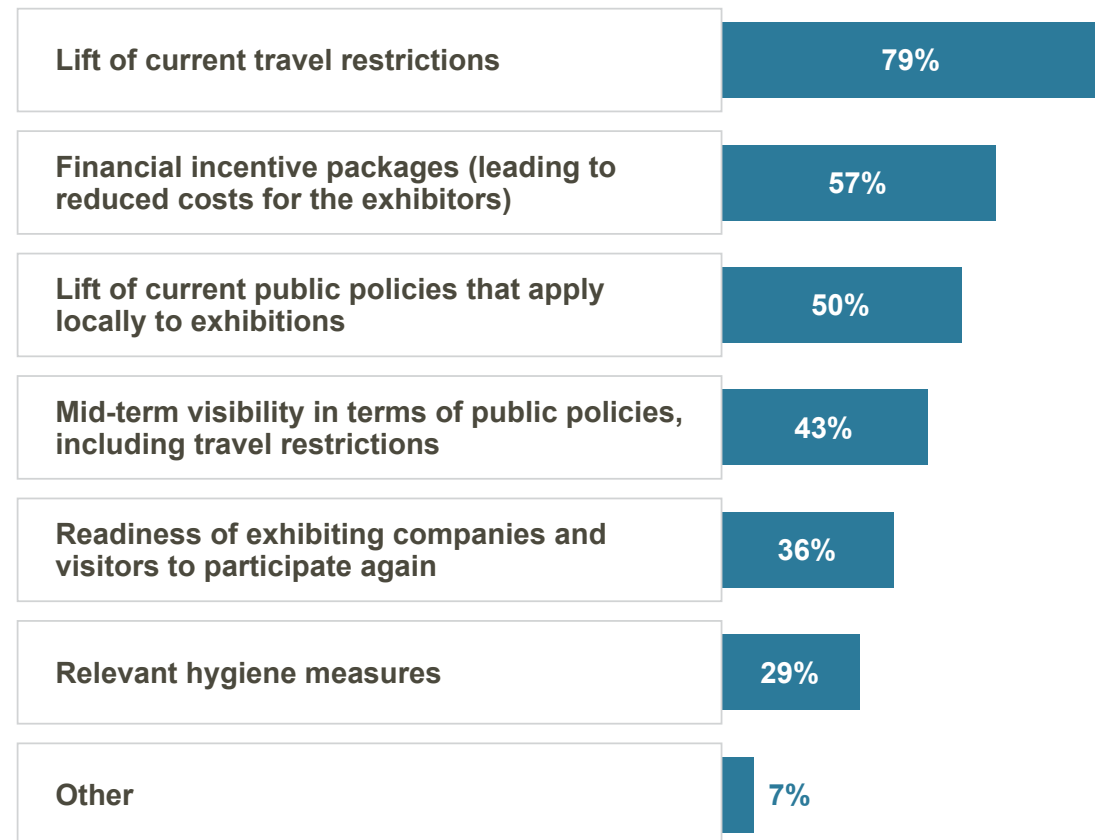




## When do you believe exhibitions will open again in your city?

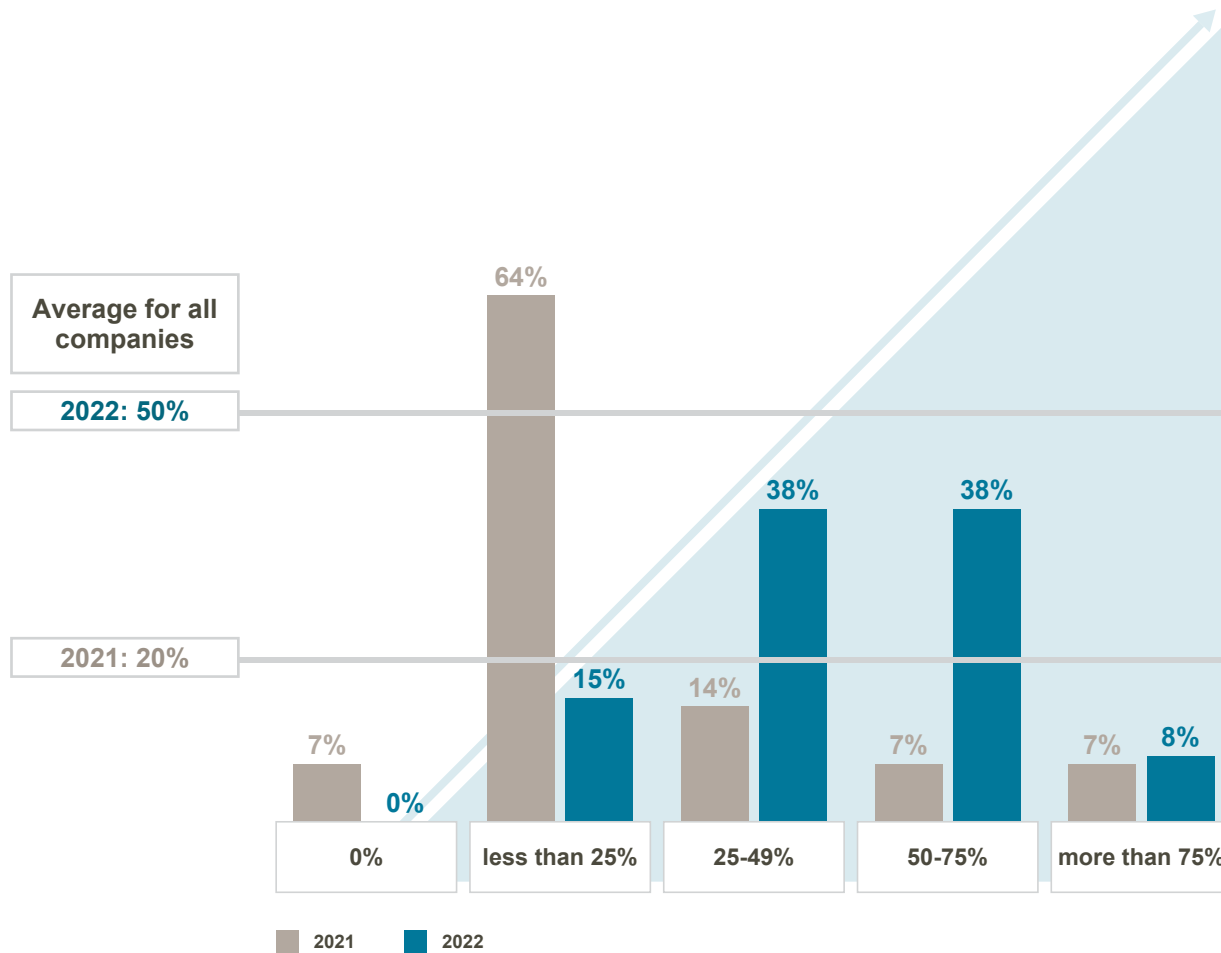


## What do you believe would most help the “bounce back” of exhibitions?

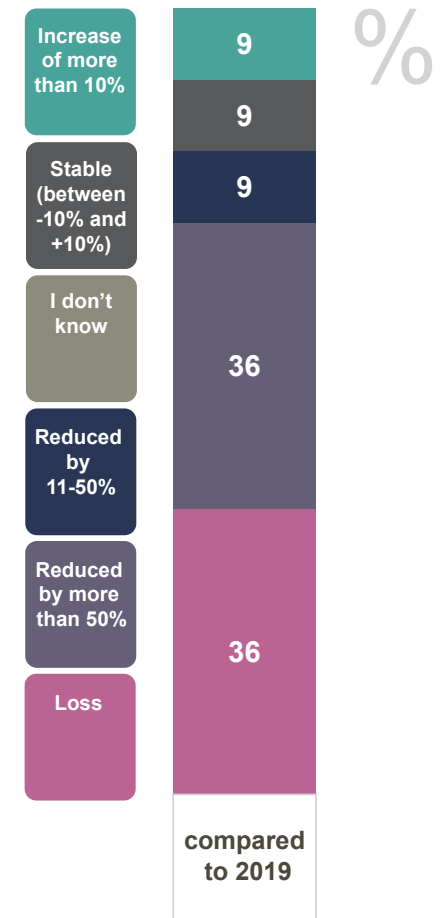




## Revenue compared to 2019



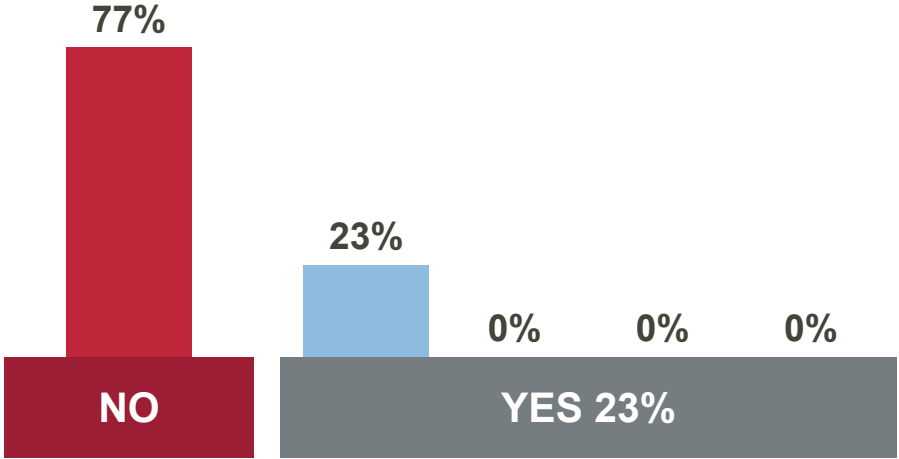
## Operating Profits 2021





## Did your company benefit from public financial support?

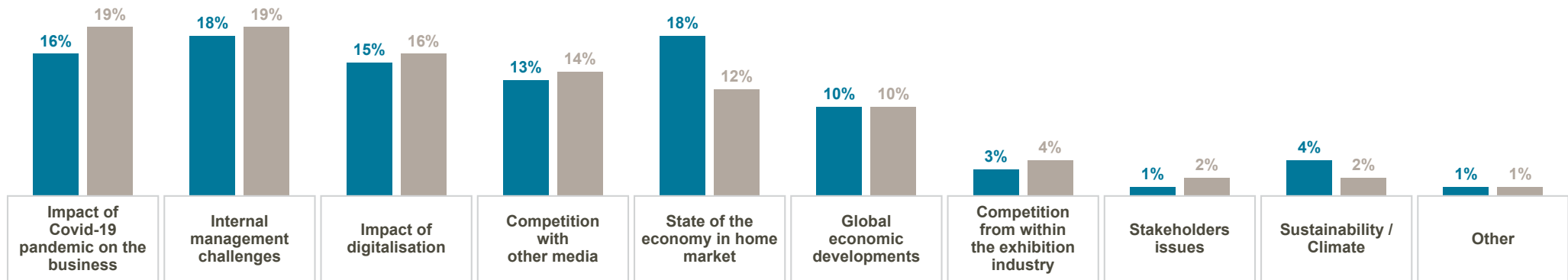
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





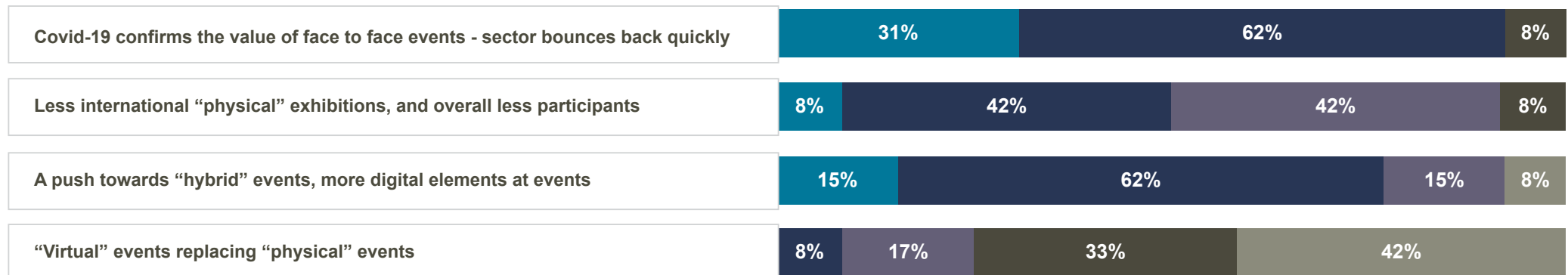
## Most important business issues in the exhibition industry

South Africa Global



## Format of exhibitions in the coming years

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

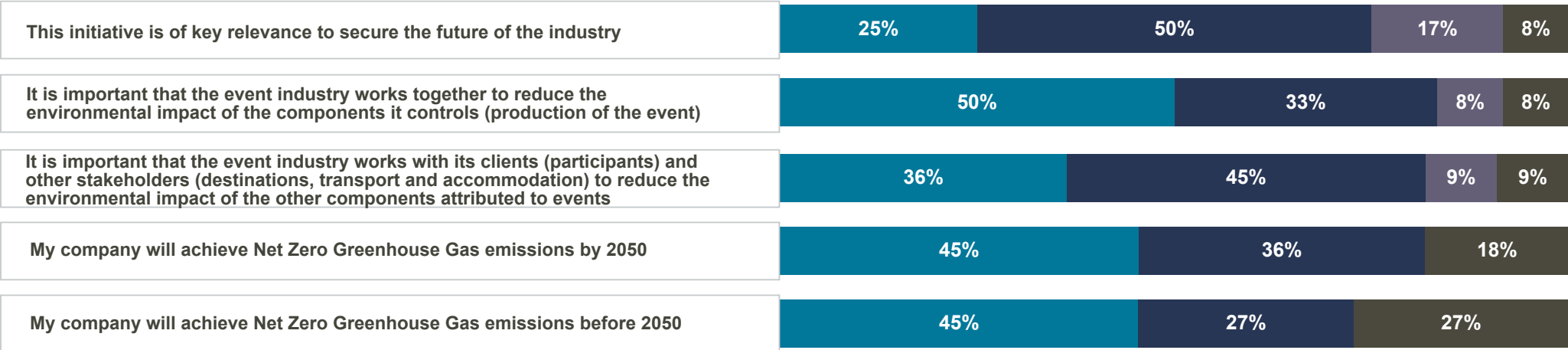






## Climate Change and Net Zero Carbon Events

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



A network diagram consisting of several nodes connected by lines. The nodes are represented as spheres, with one central node highlighted in a vibrant blue color. The other nodes are a darker, metallic-looking blue. The connections are thin, light-colored lines. The entire scene is set against a solid, light purple background.

Asia-Pacific

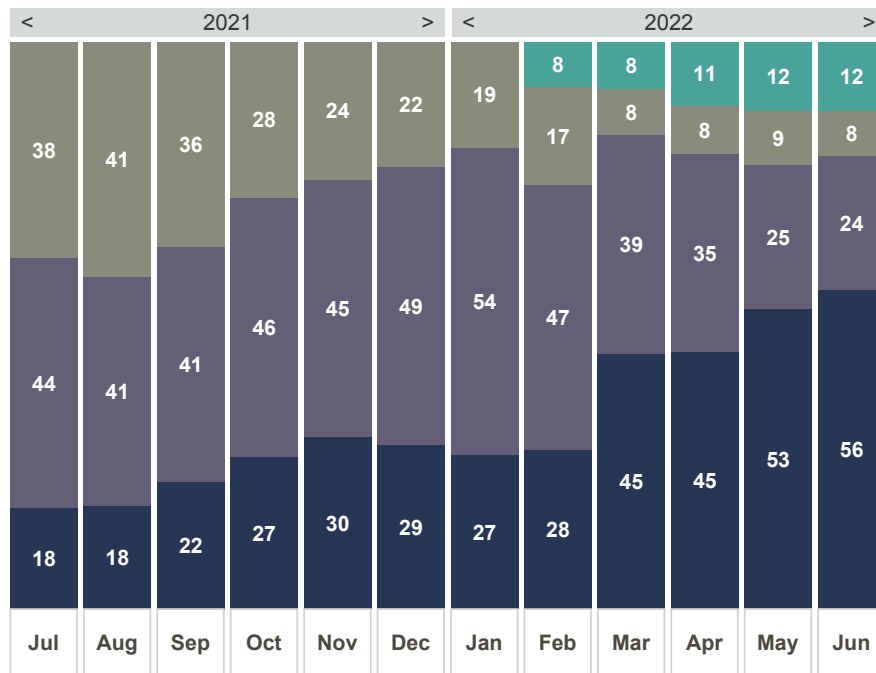
# Operations - Reopening Exhibitions Asia-Pacific



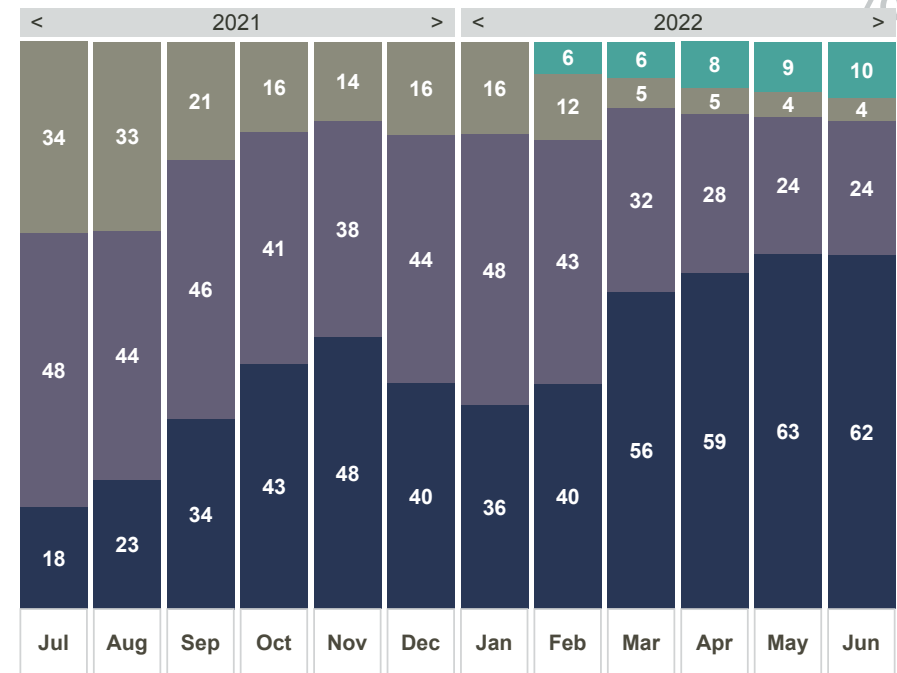
Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022



## Asia-Pacific

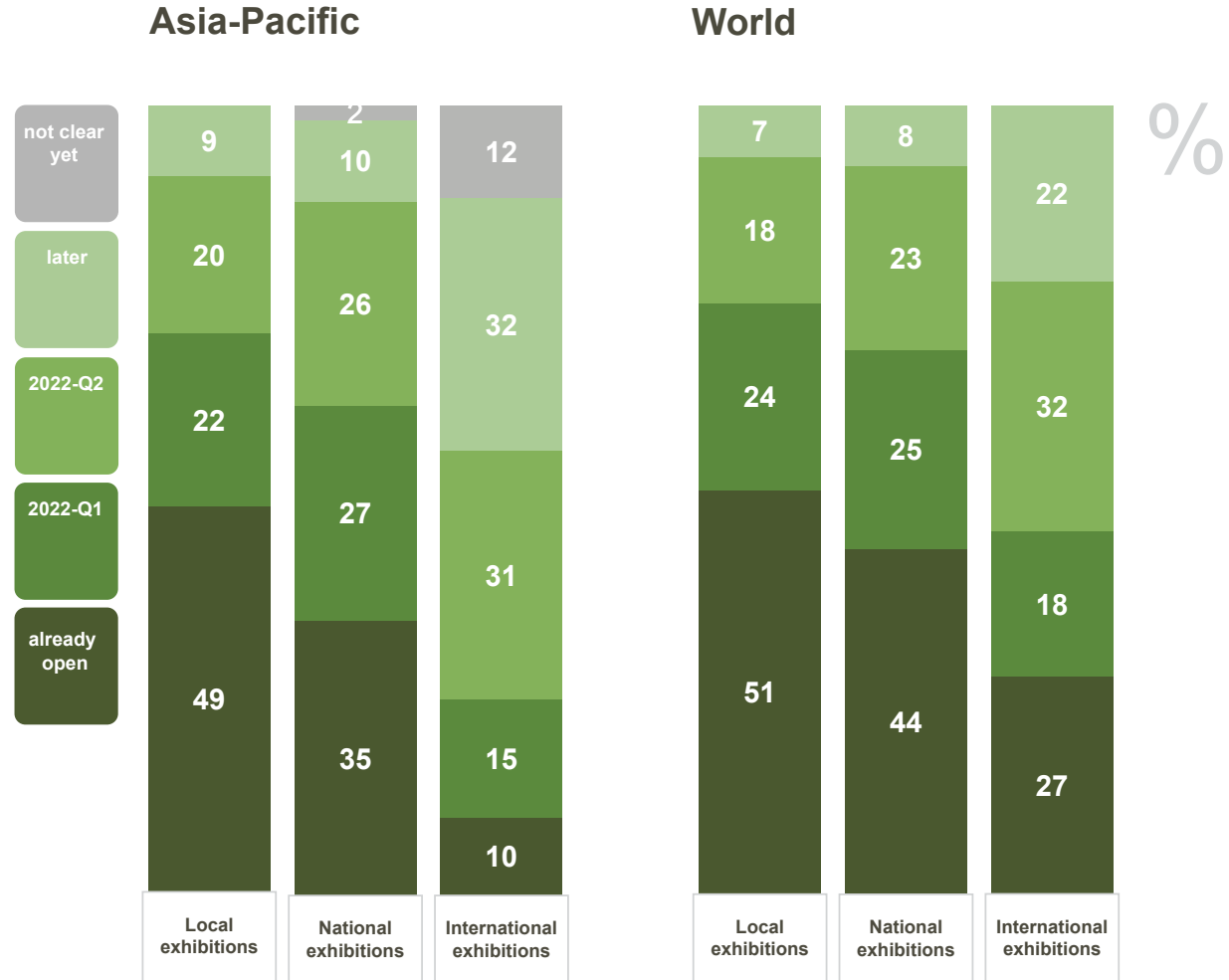


## World





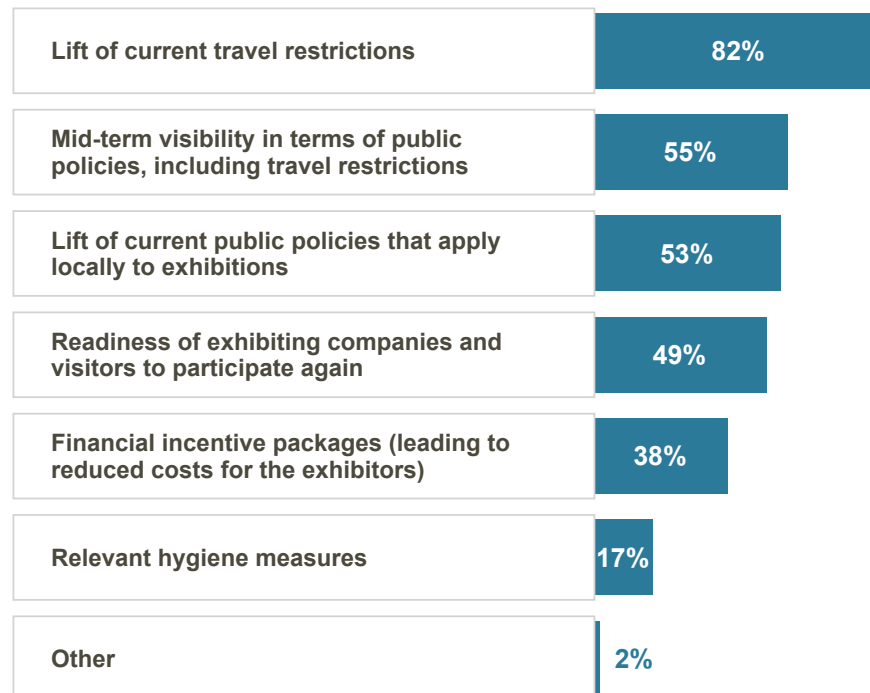
When do you believe exhibitions will open again in your city?



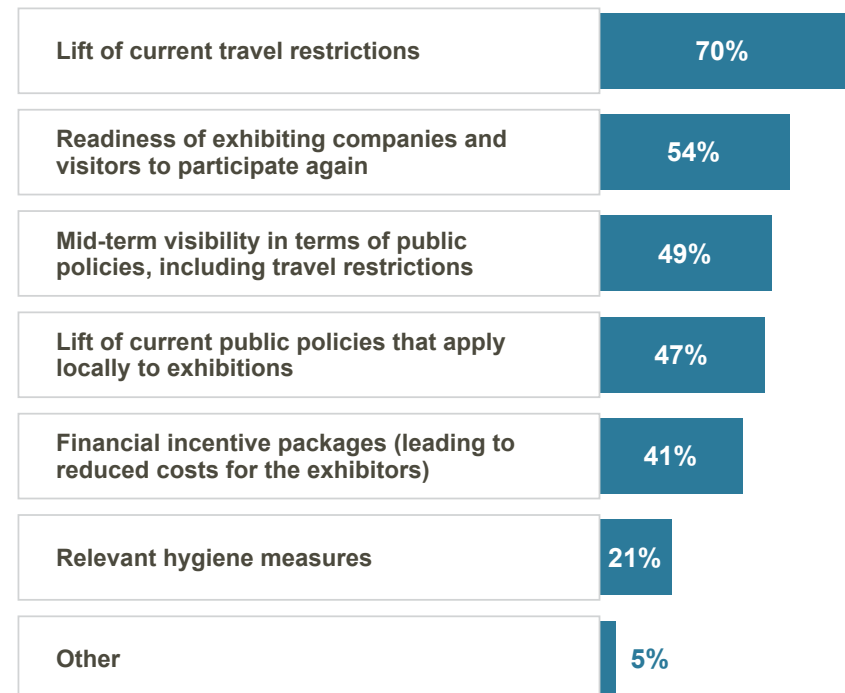


## What do you believe would most help the “bounce back” of exhibitions?

### Asia-Pacific

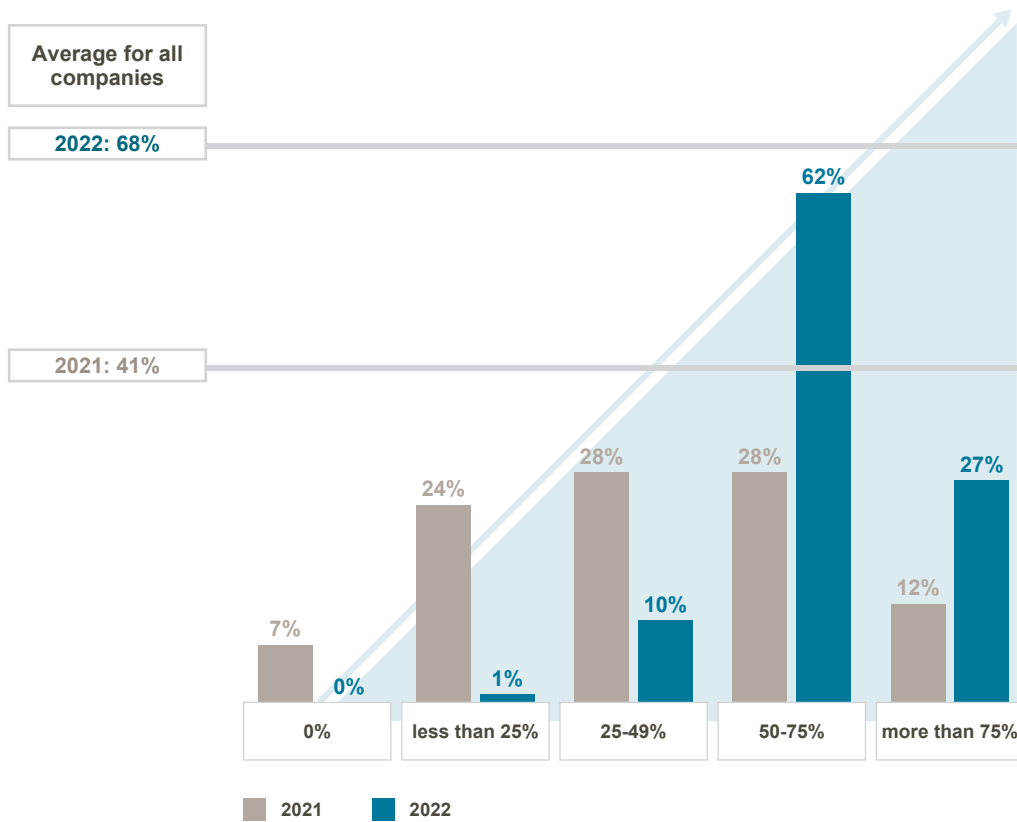


### World

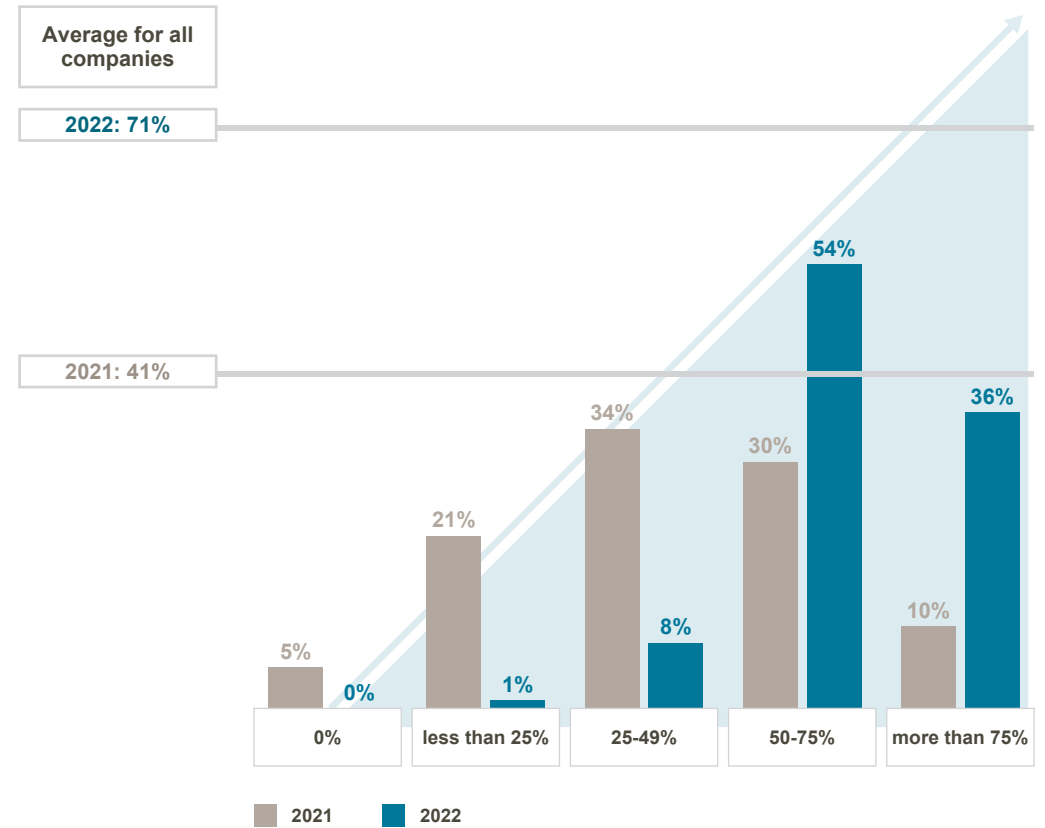


## Revenue compared to 2019

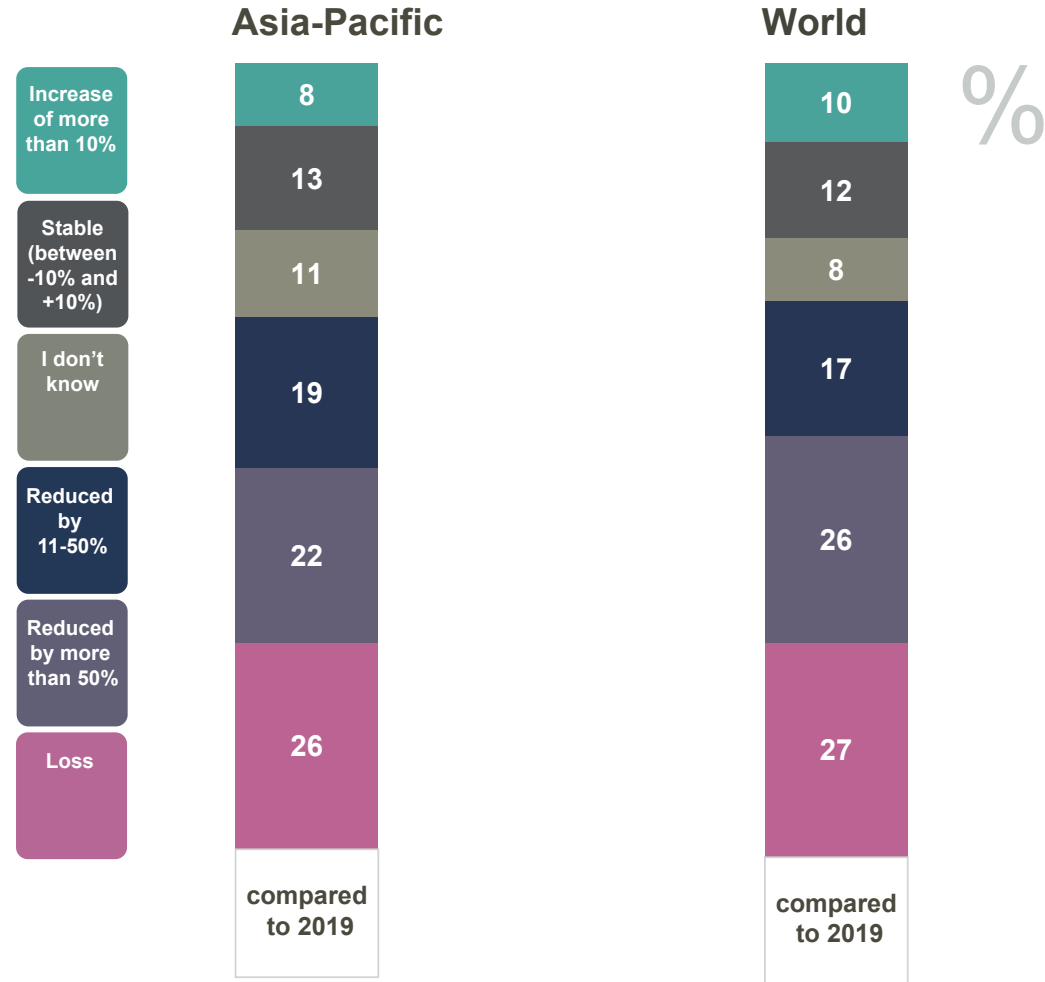
### Asia-Pacific



### World



# Operating profit 2019 Asia-Pacific

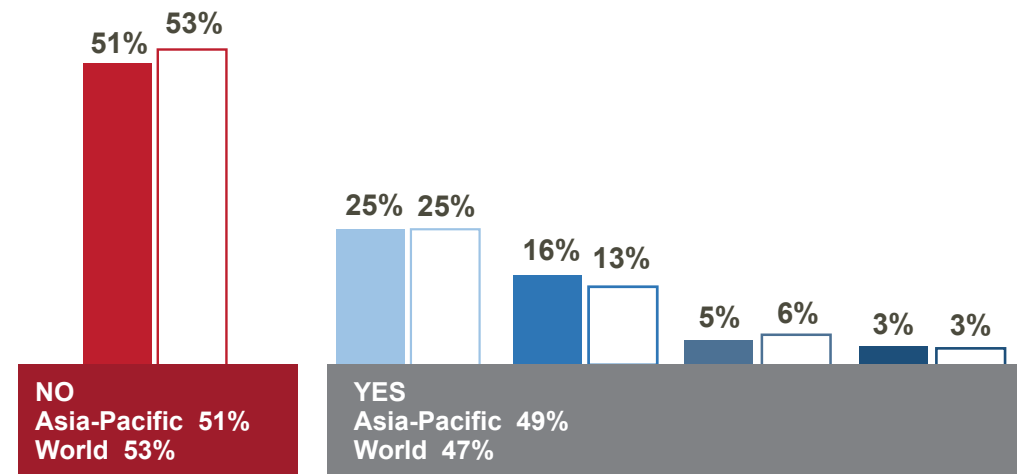


## Did your company benefit from public financial support?

Asia-Pacific

World

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

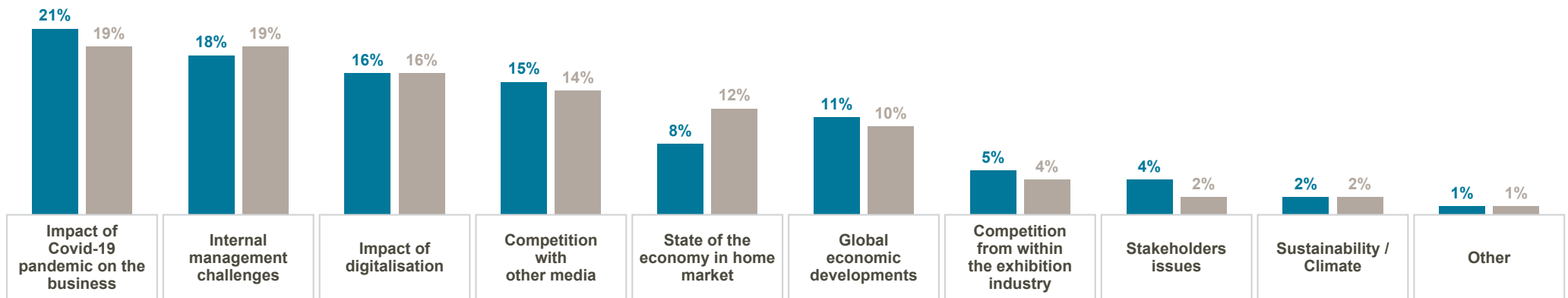




# Most Important Business Issues - Format of Exhibitions - Asia-Pacific

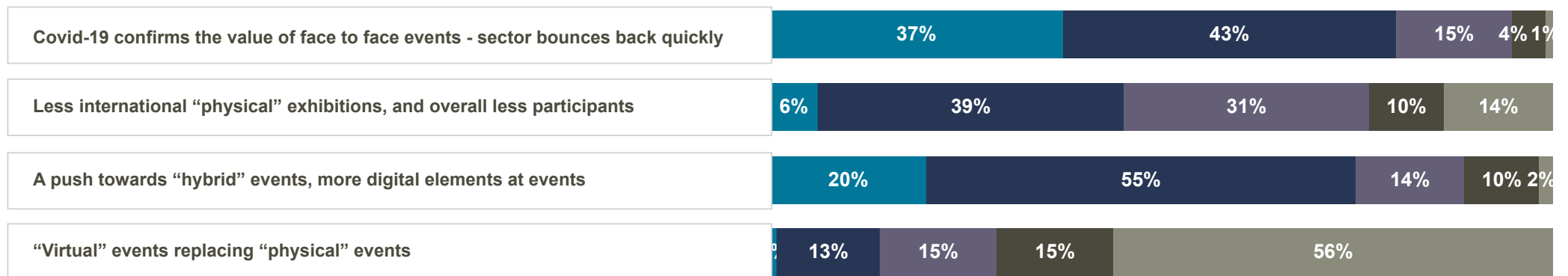
## Most important business issues in the exhibition industry

Asia-Pacific Global



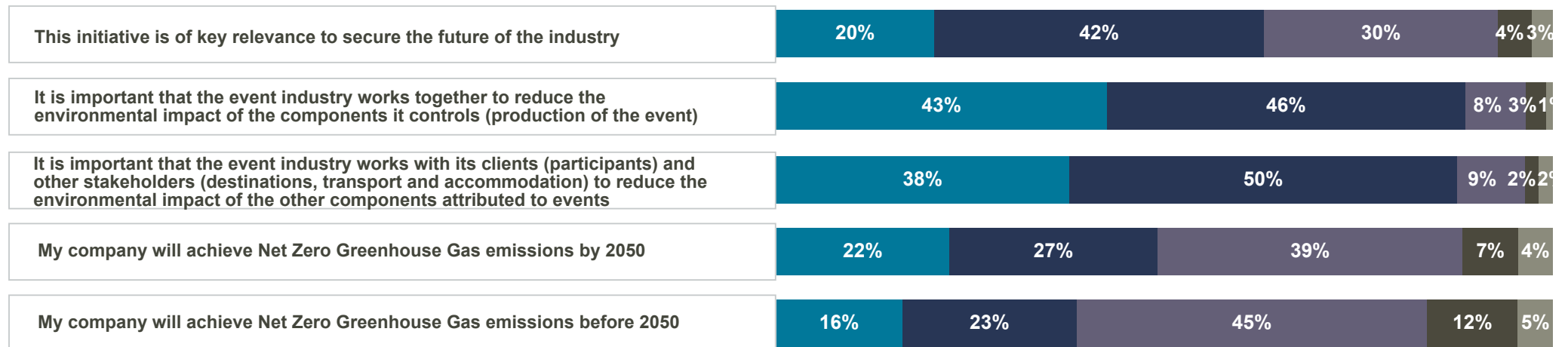
## Format of exhibitions in the coming years

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

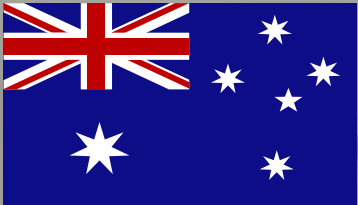


## Climate Change and Net Zero Carbon Events

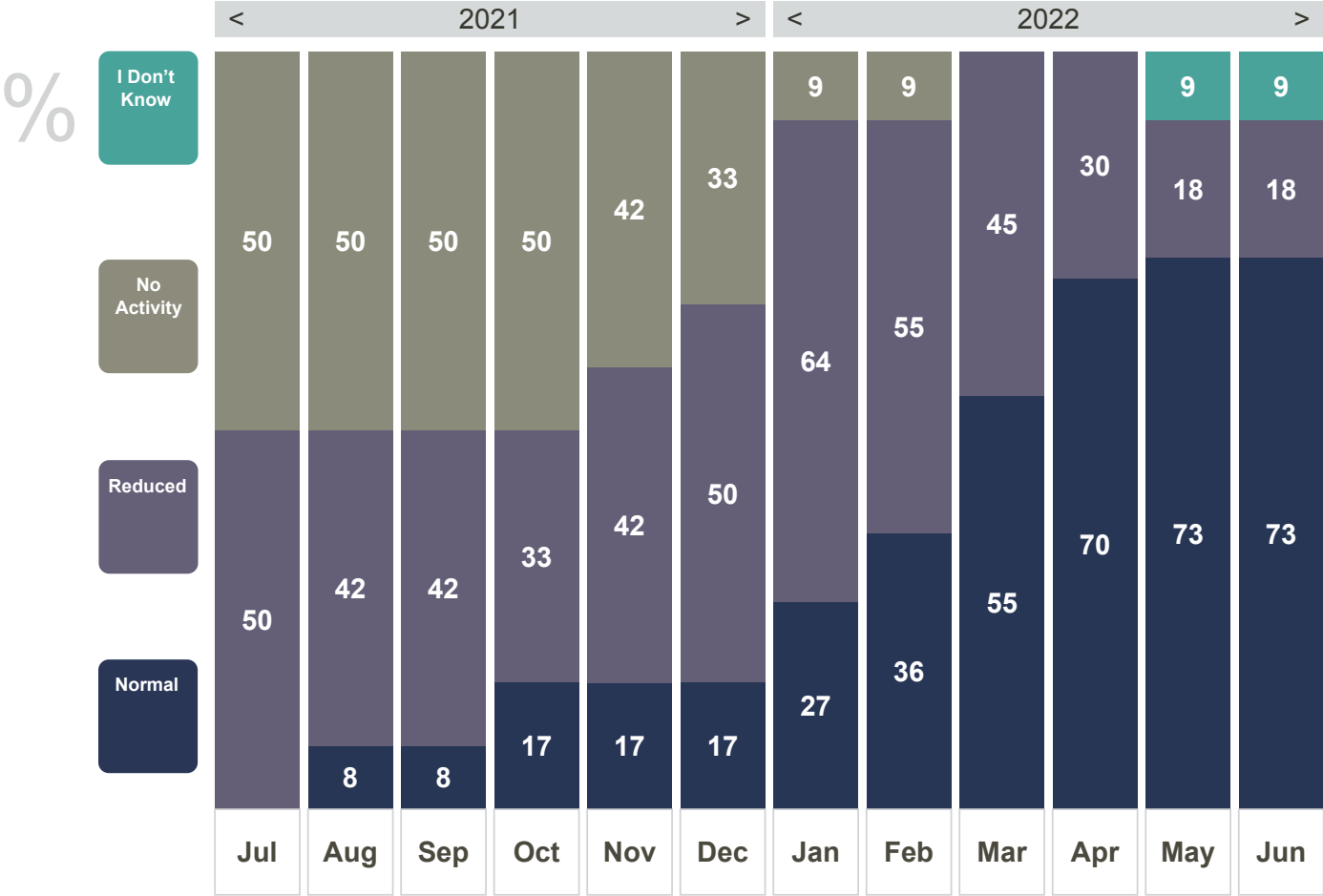
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not

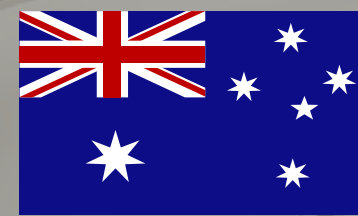


# Detailed results for Australia

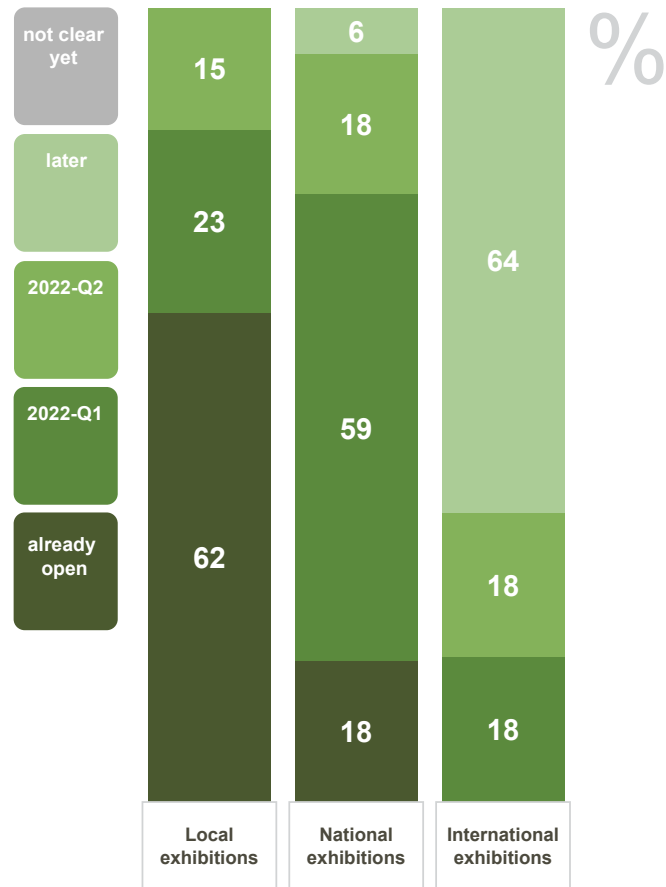


Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

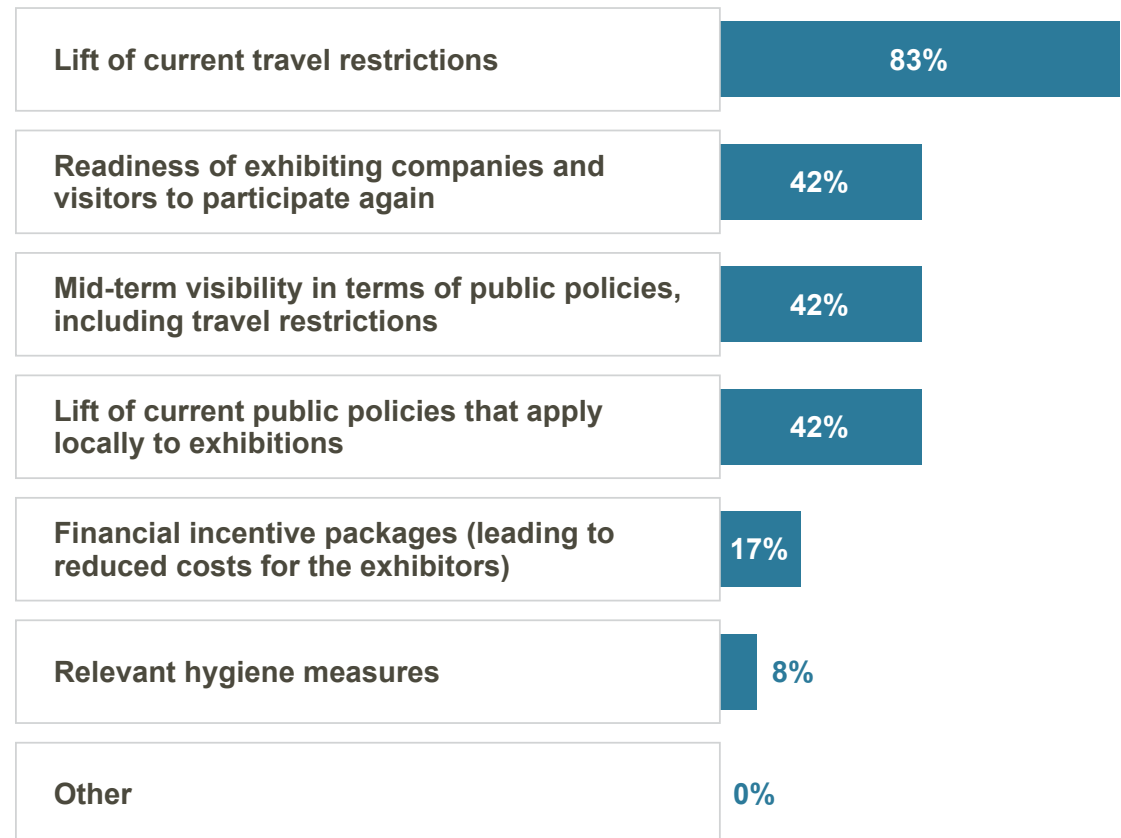




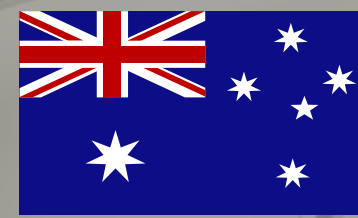
## When do you believe exhibitions will open again in your city?



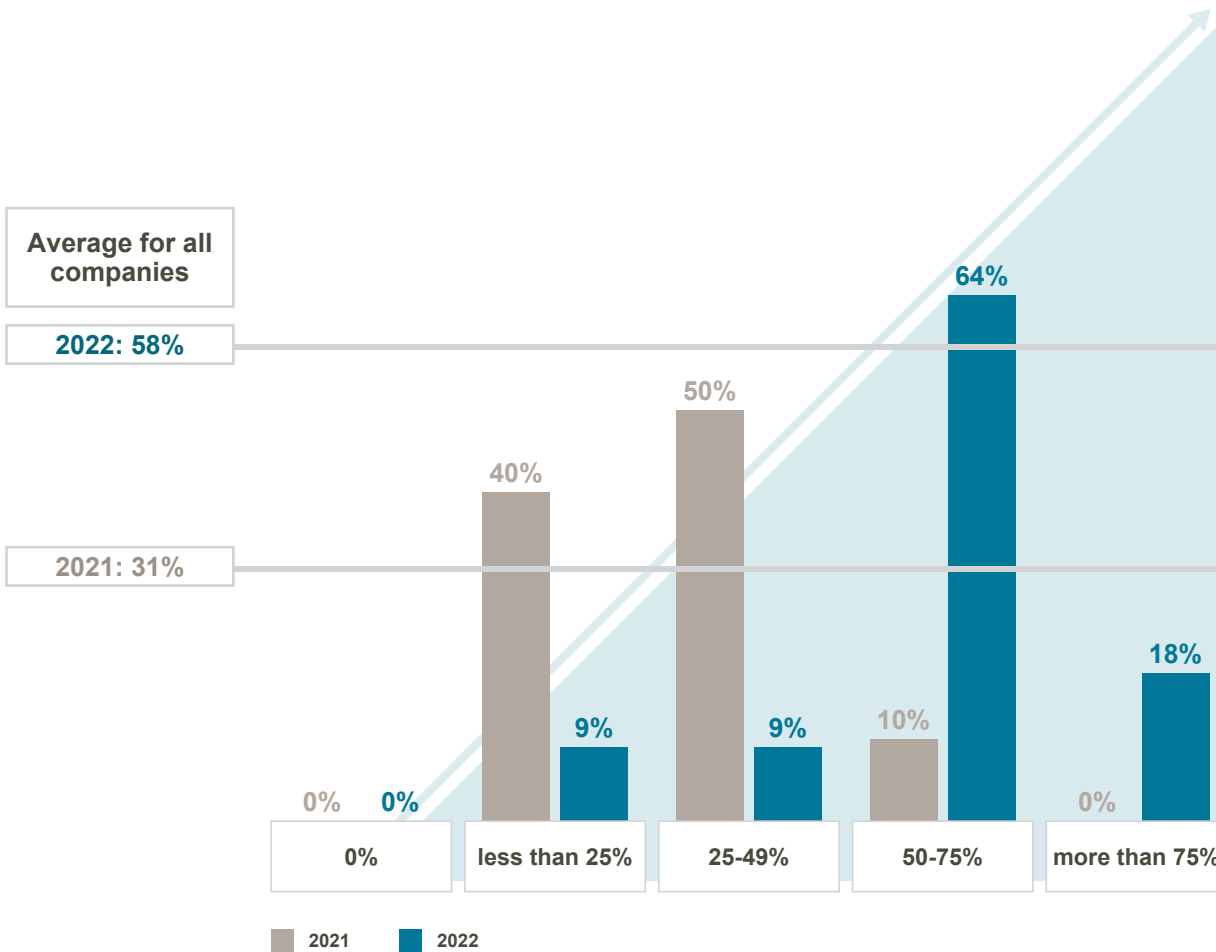
## What do you believe would most help the “bounce back” of exhibitions?



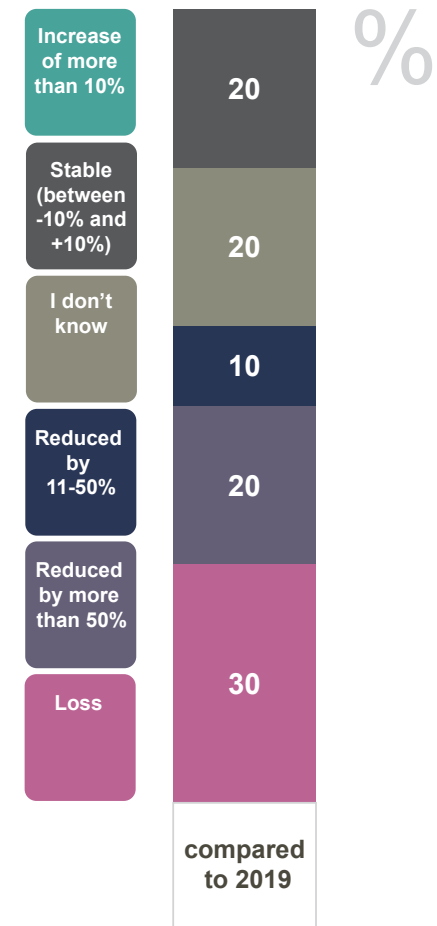
# Detailed results for Australia

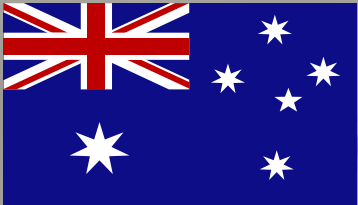


## Revenue compared to 2019



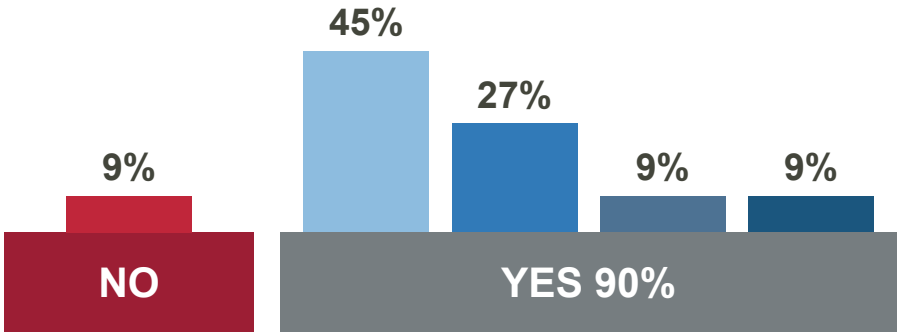
## Operating Profits 2021



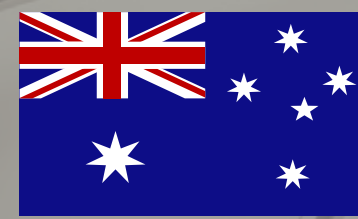


## Did your company benefit from public financial support?

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



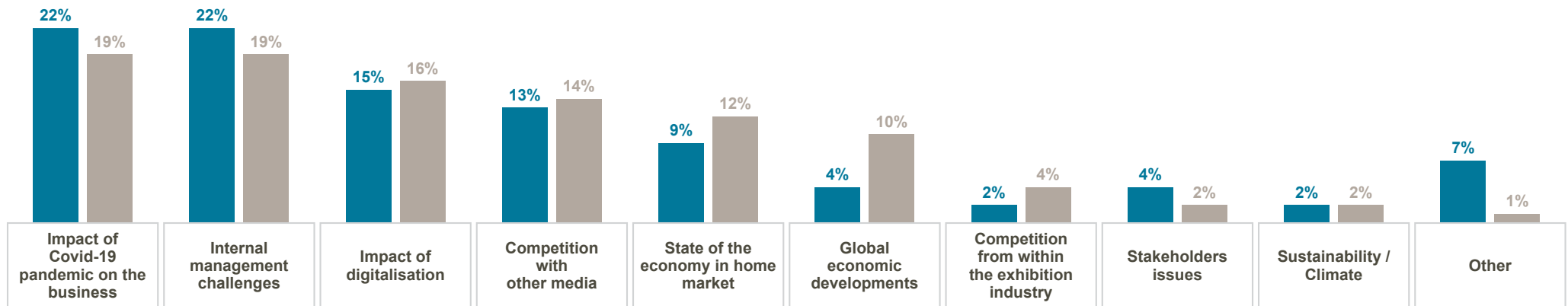
# Detailed results for Australia



## Most important business issues in the exhibition industry

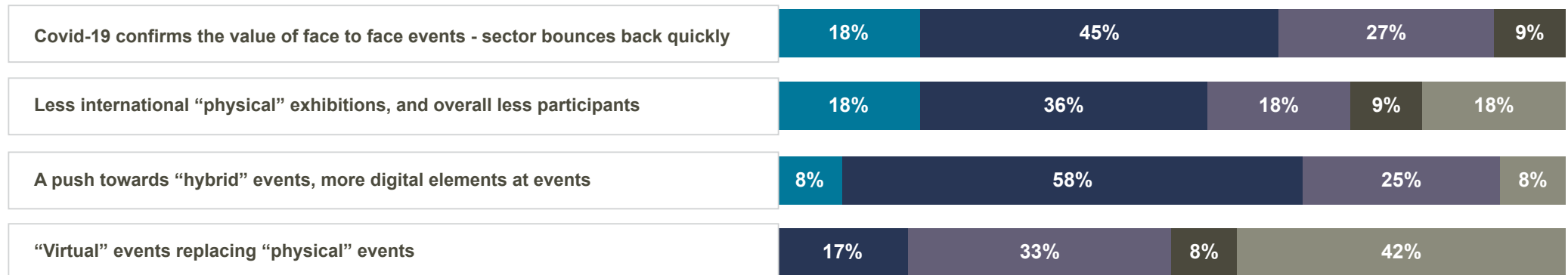
Australia

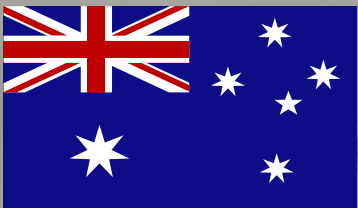
Global



## Format of exhibitions in the coming years

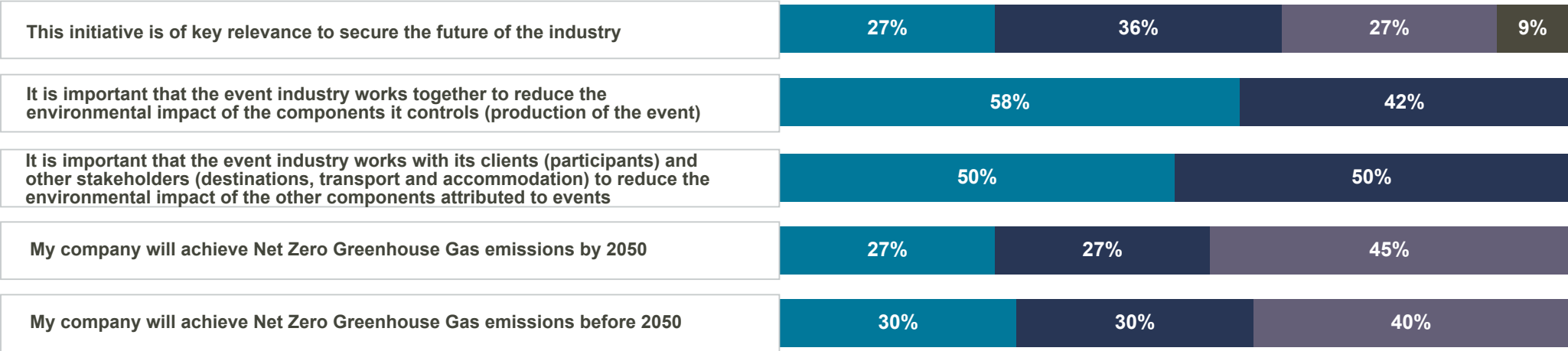
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not





## Climate Change and Net Zero Carbon Events

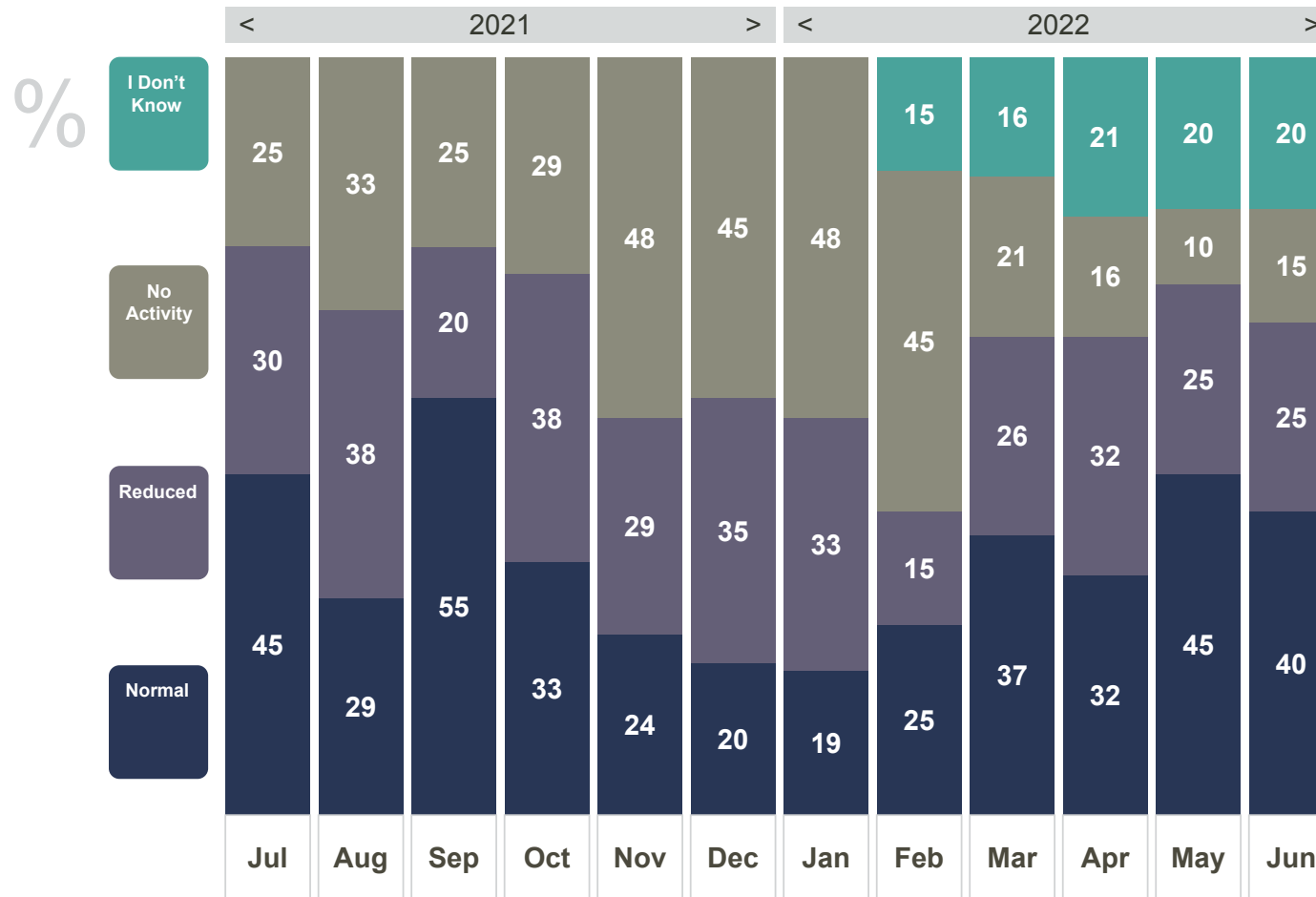
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not





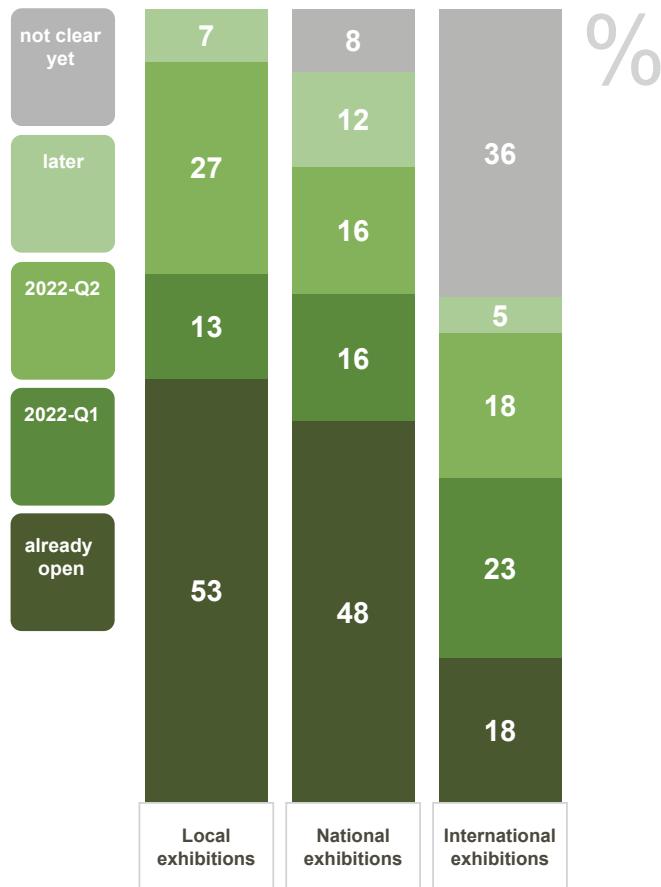


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

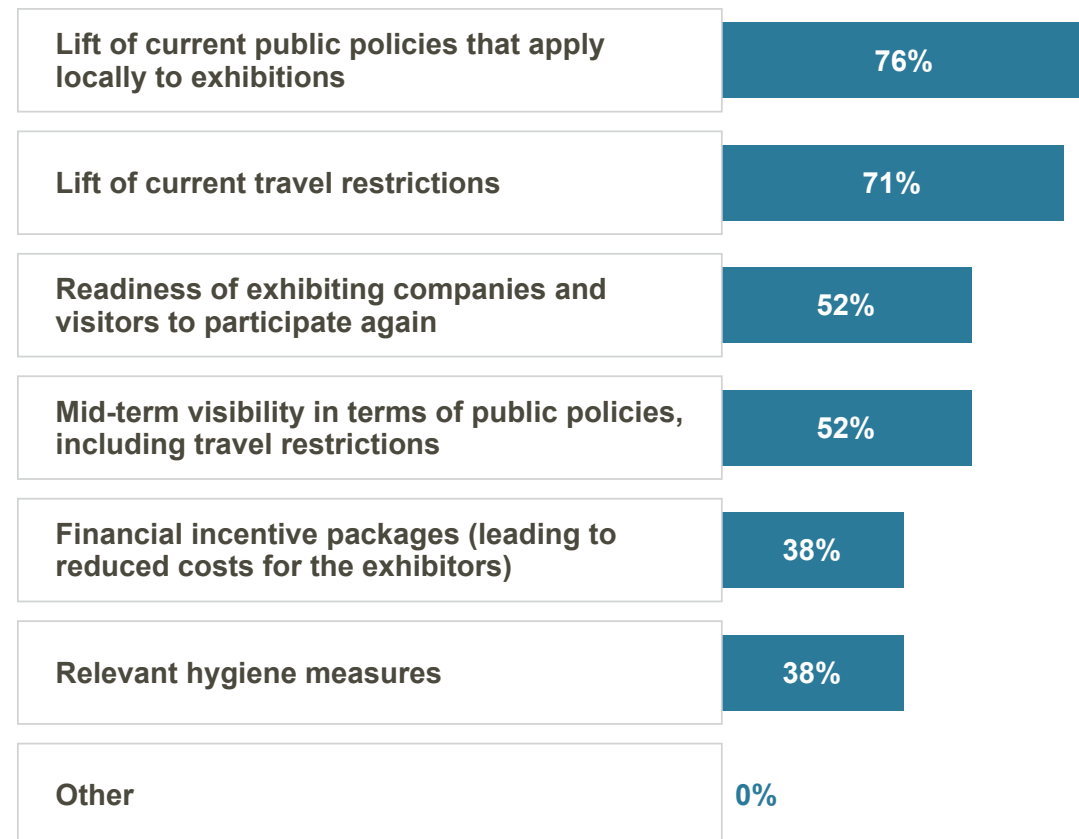




## When do you believe exhibitions will open again in your city?

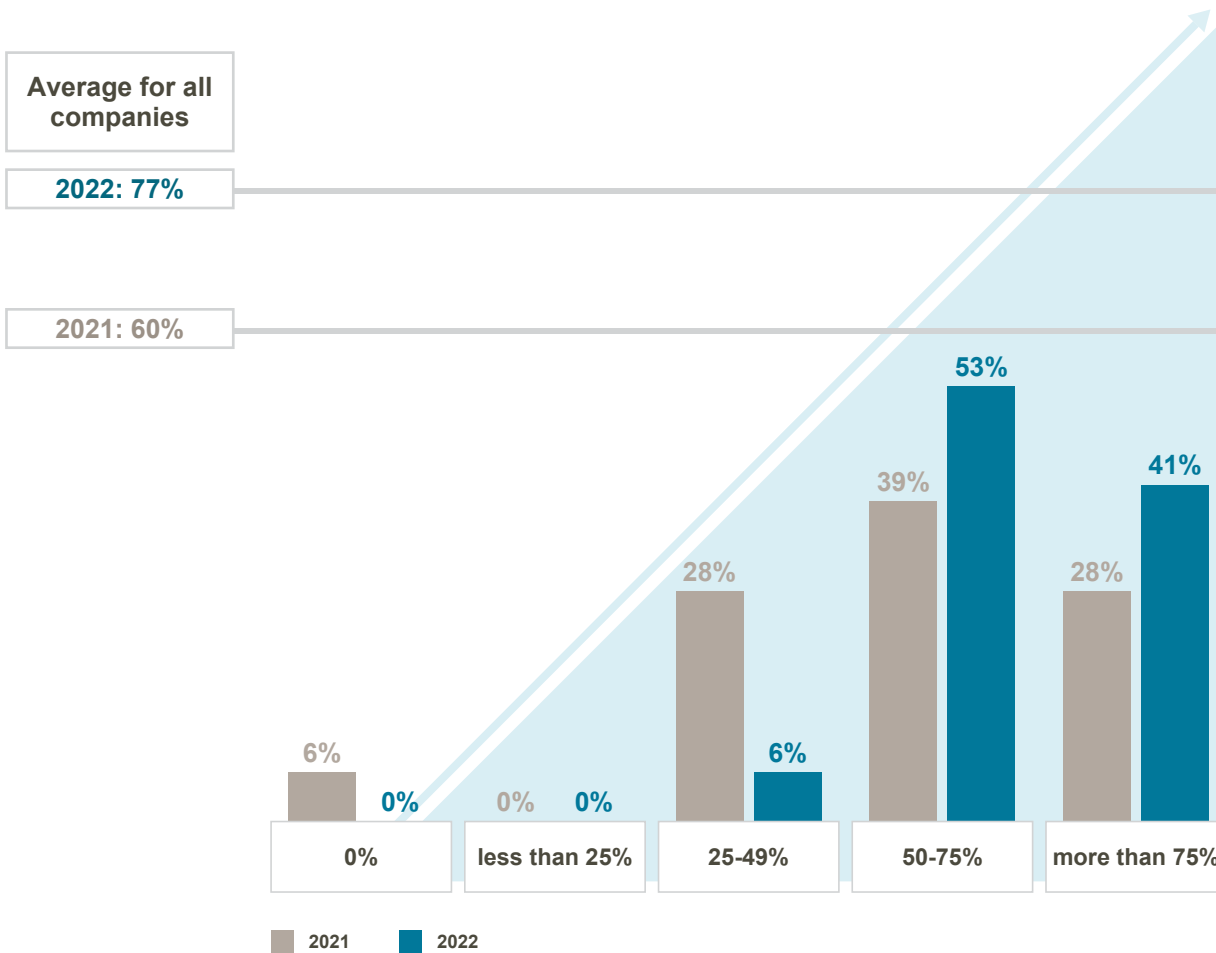


## What do you believe would most help the “bounce back” of exhibitions?

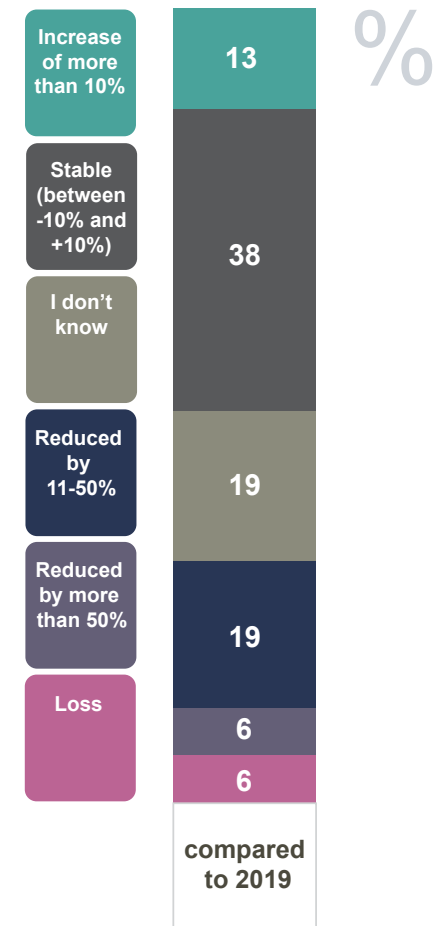




## Revenue compared to 2019



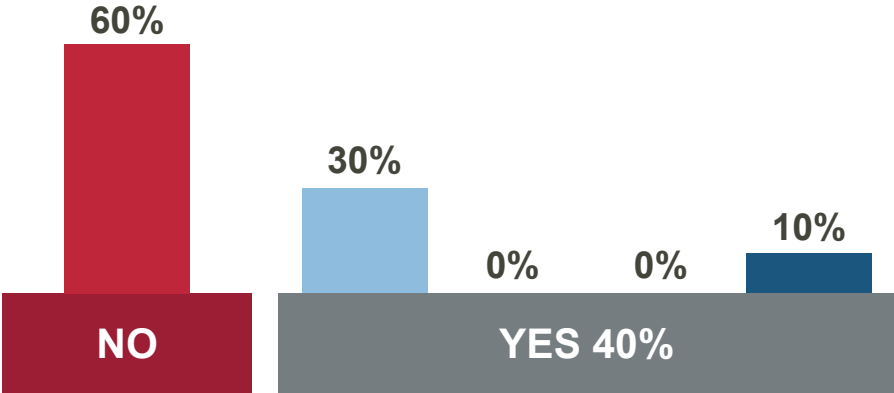
## Operating Profits 2021





## Did your company benefit from public financial support?

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

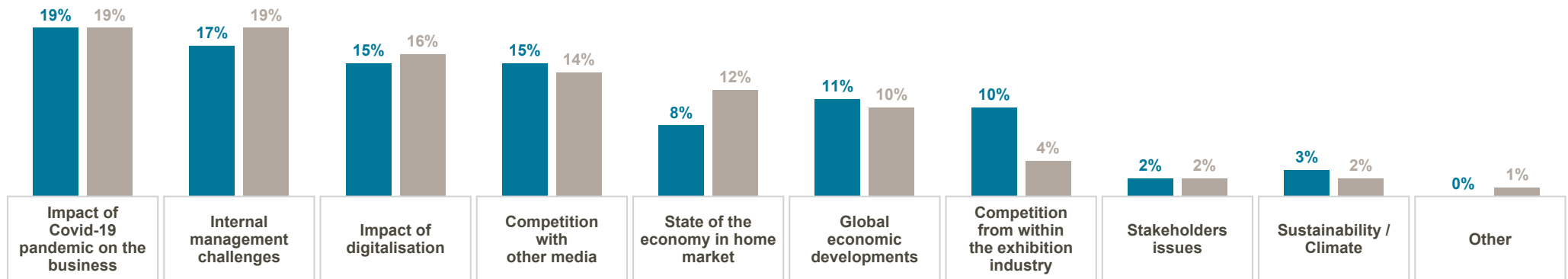




## Most important business issues in the exhibition industry

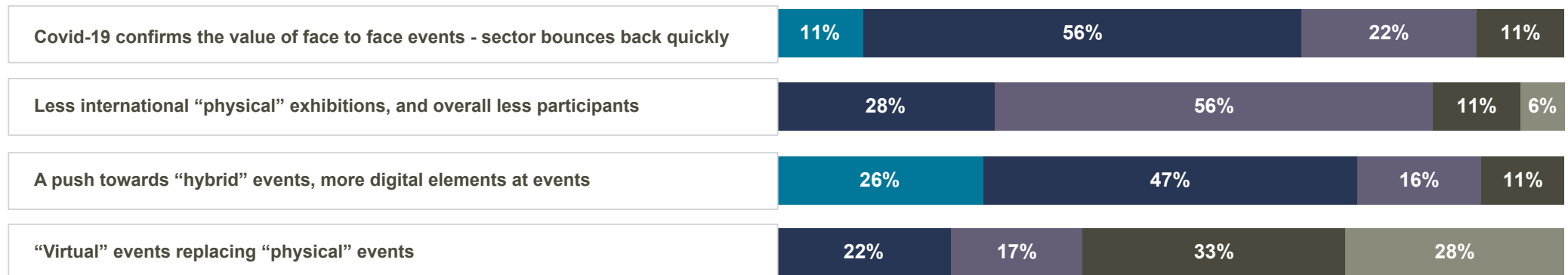
China

Global



## Format of exhibitions in the coming years

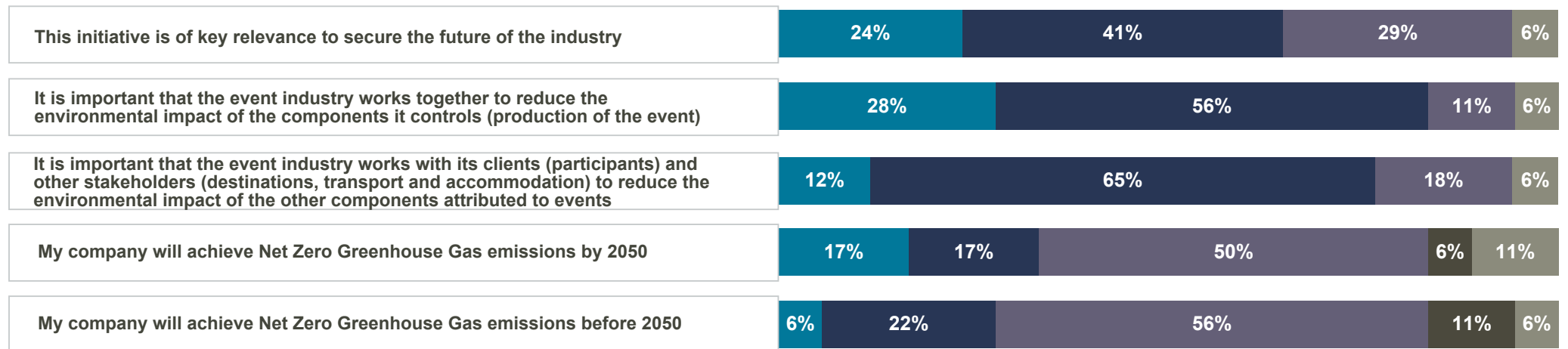
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not

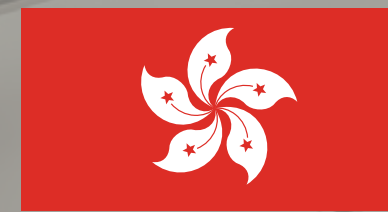




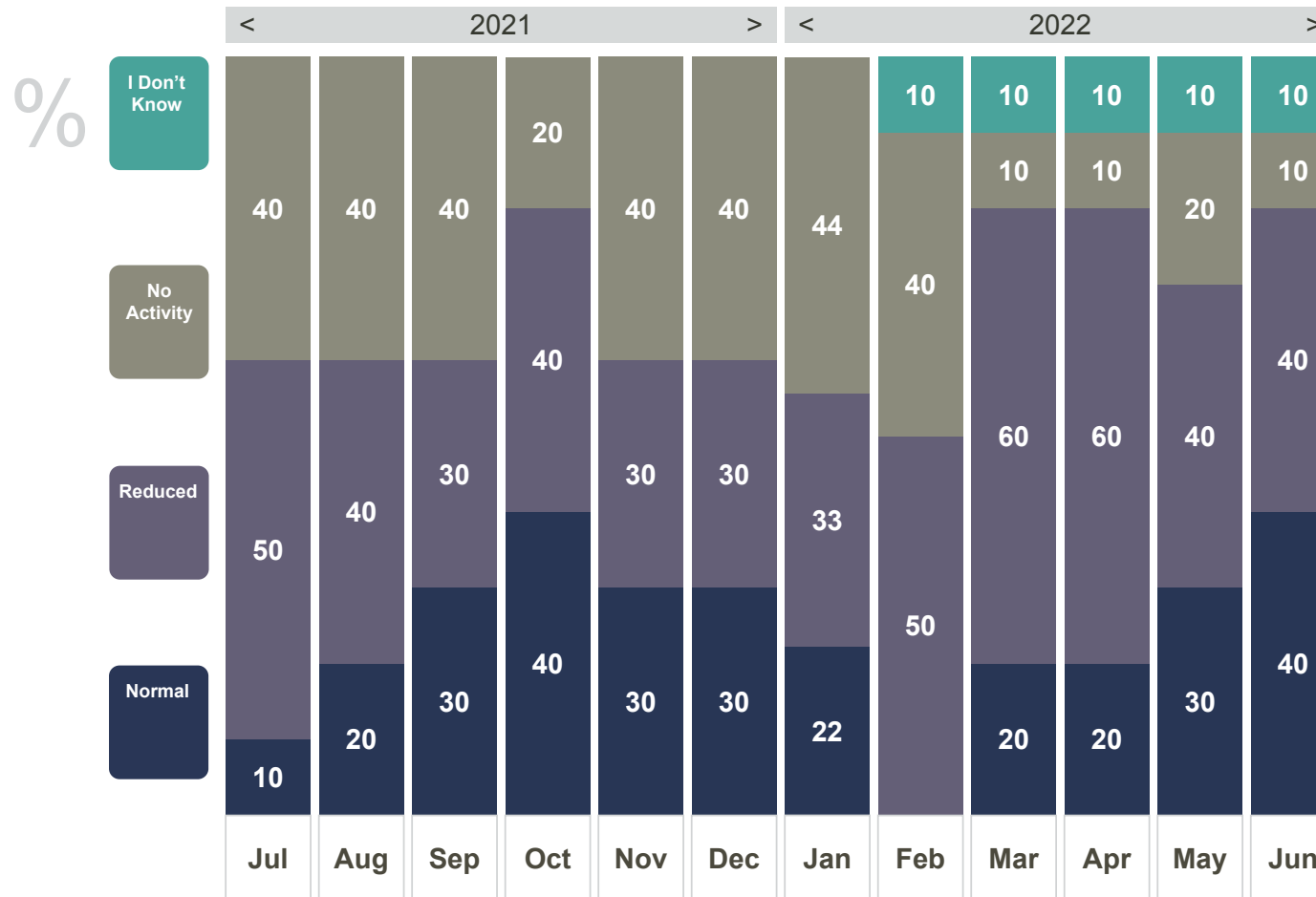
## Climate Change and Net Zero Carbon Events

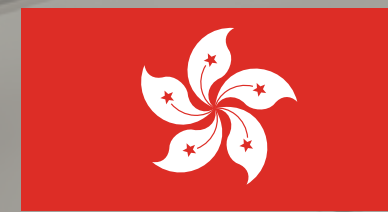
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not



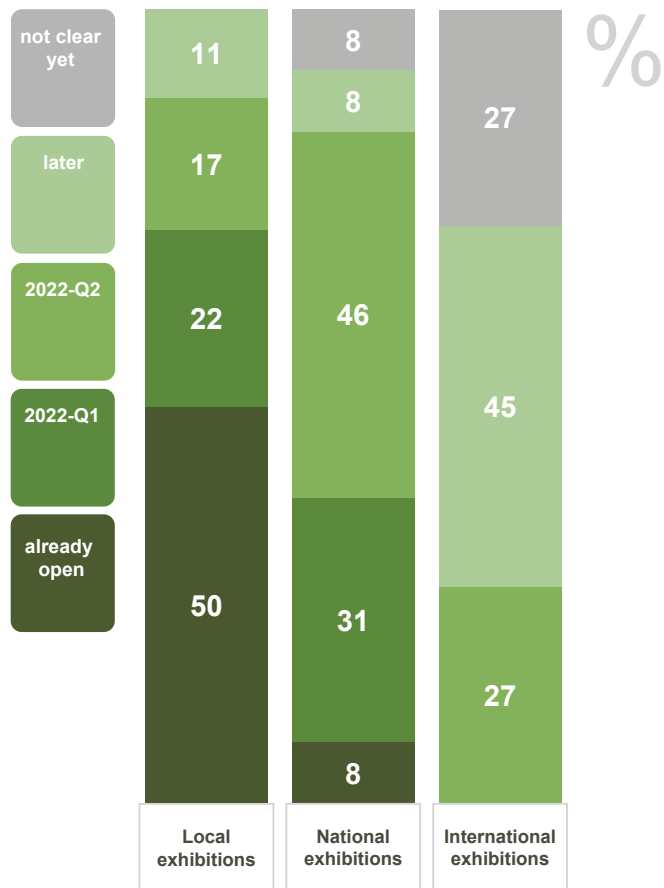


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

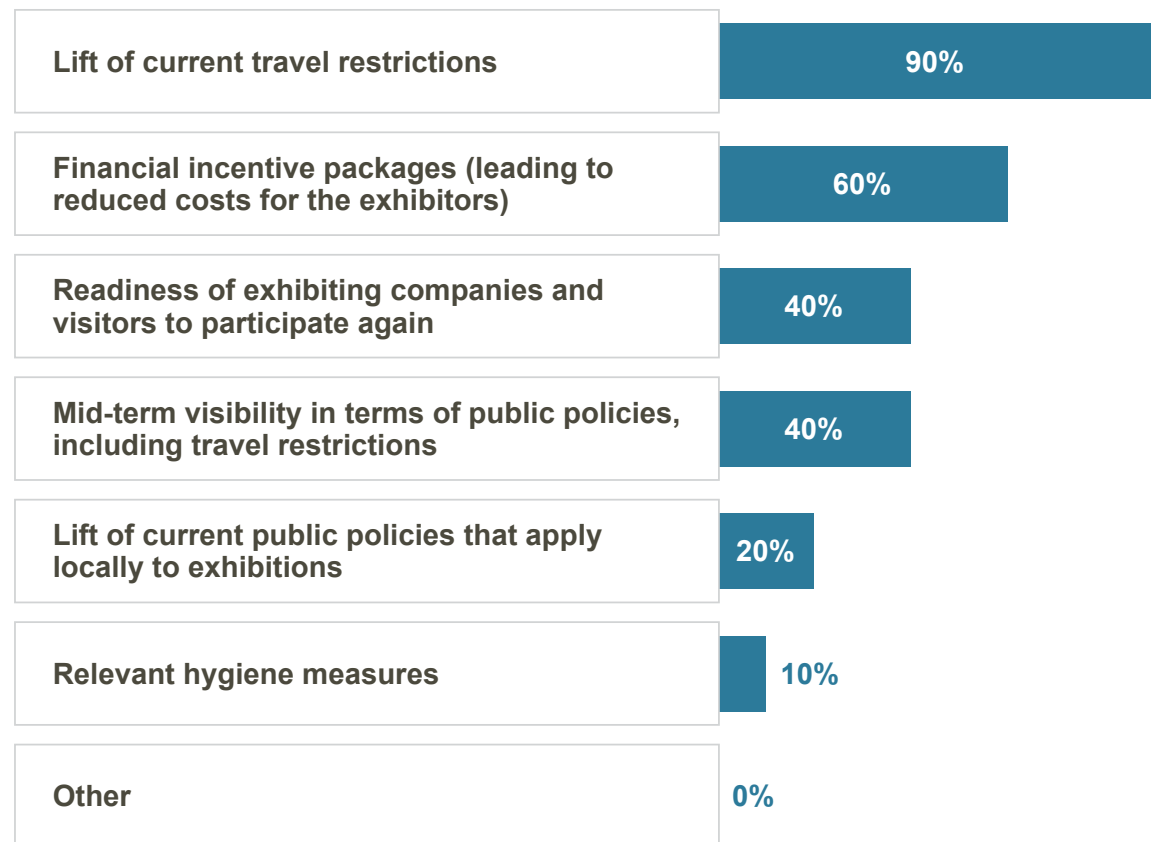




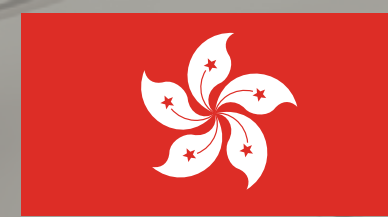
## When do you believe exhibitions will open again in your city?



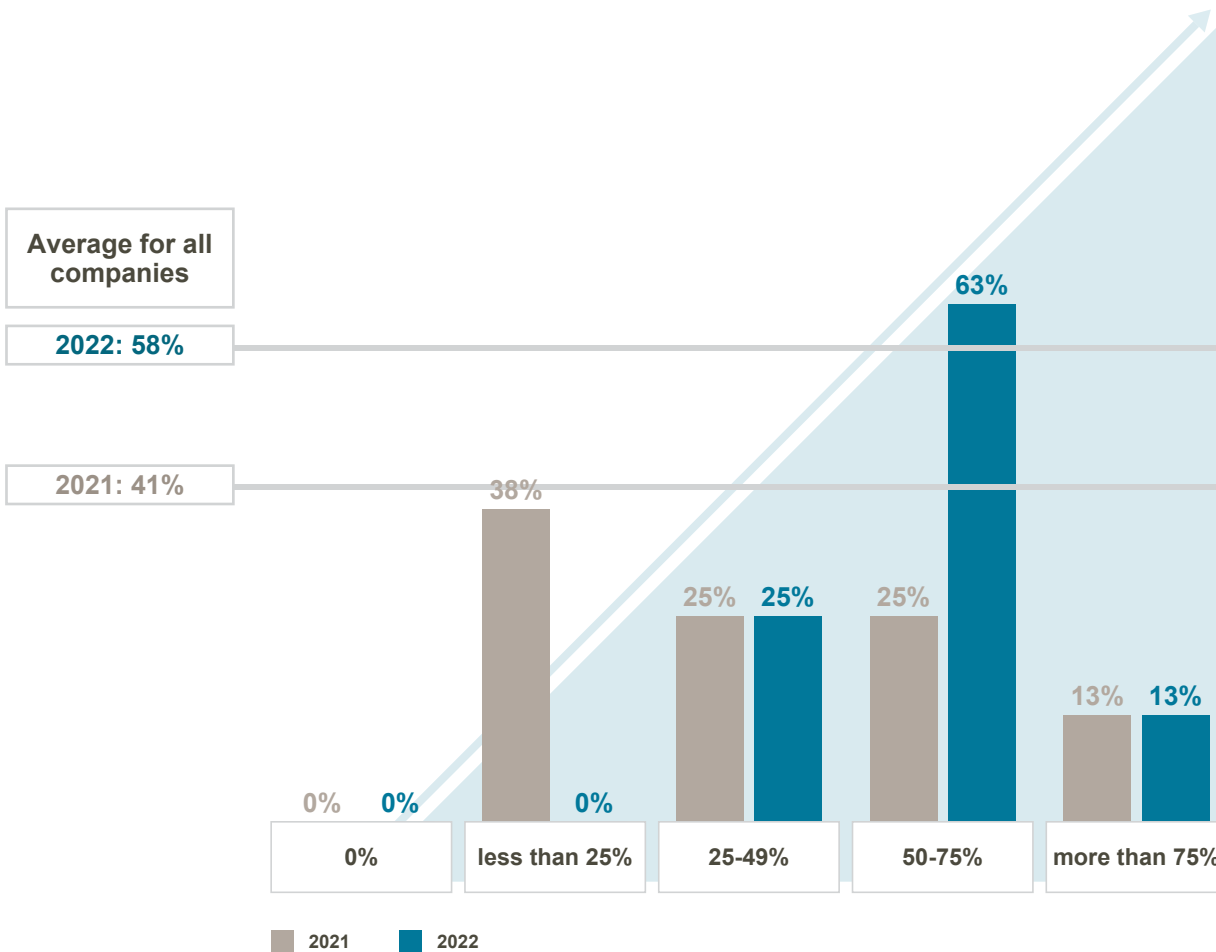
## What do you believe would most help the “bounce back” of exhibitions?



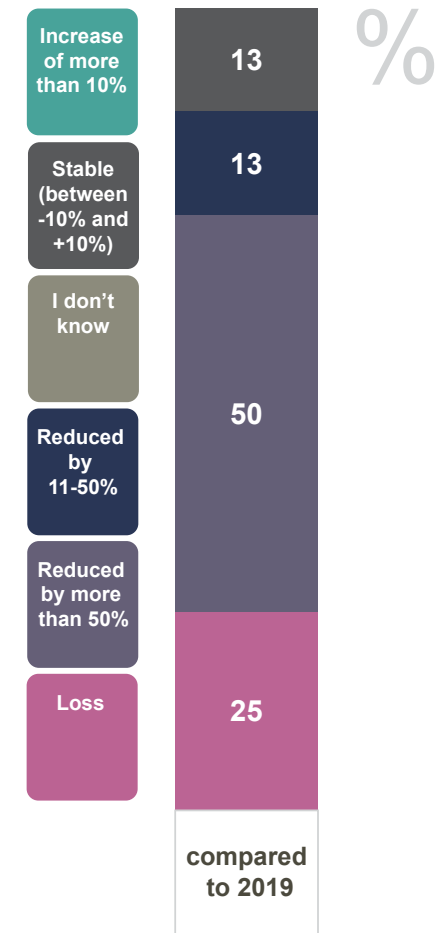


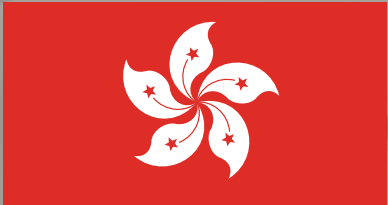


## Revenue compared to 2019



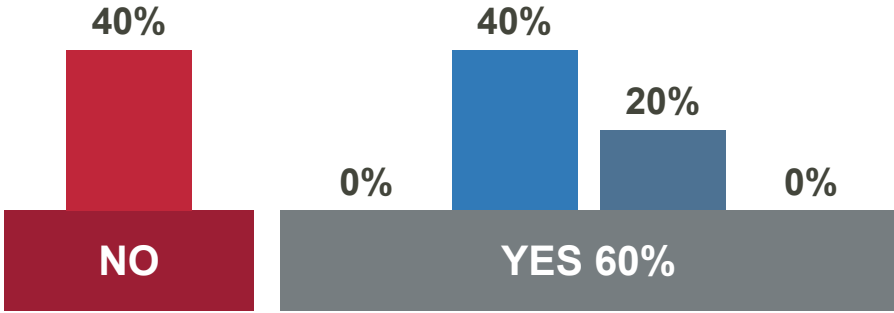
## Operating Profits 2021

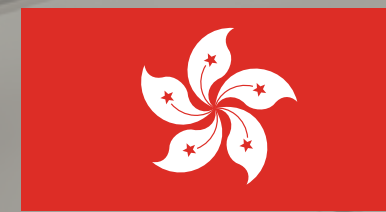




## Did your company benefit from public financial support?

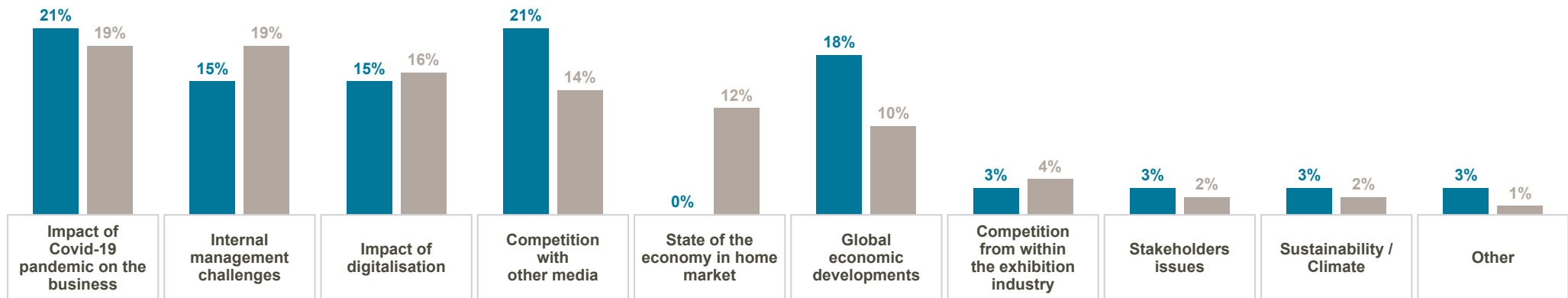
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





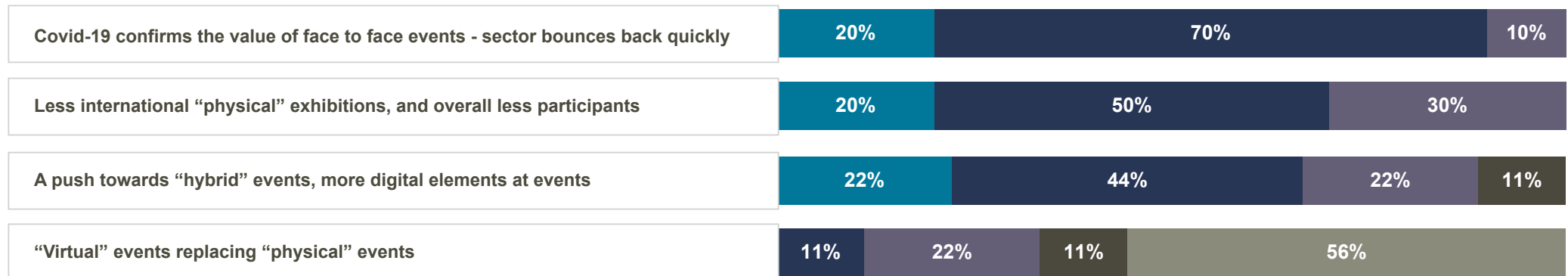
## Most important business issues in the exhibition industry

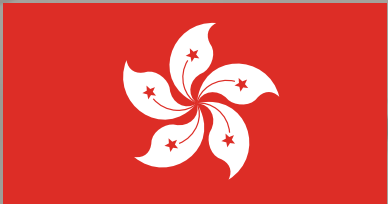
Hong Kong Global



## Format of exhibitions in the coming years

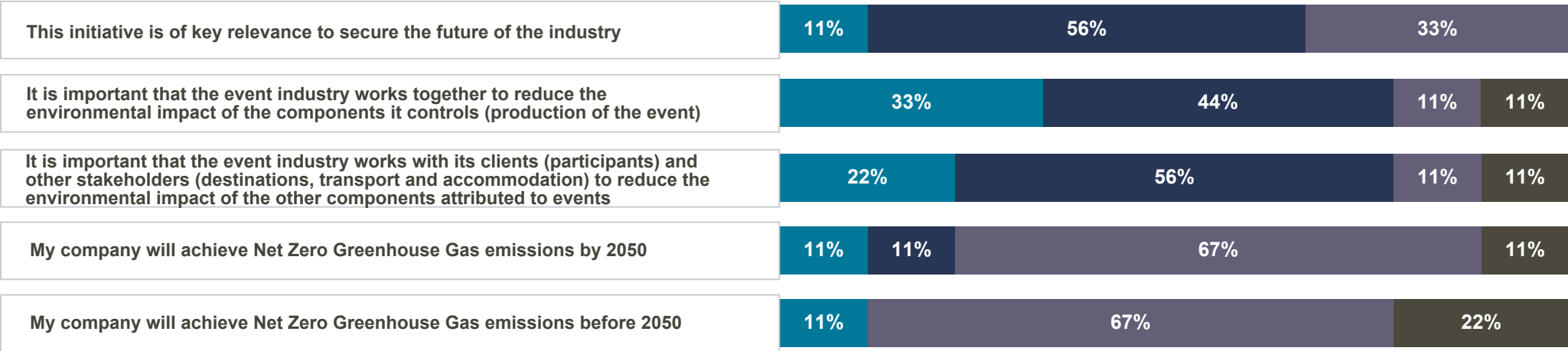
Yes, for sure Most probably Not sure Not sure at all Definitely not





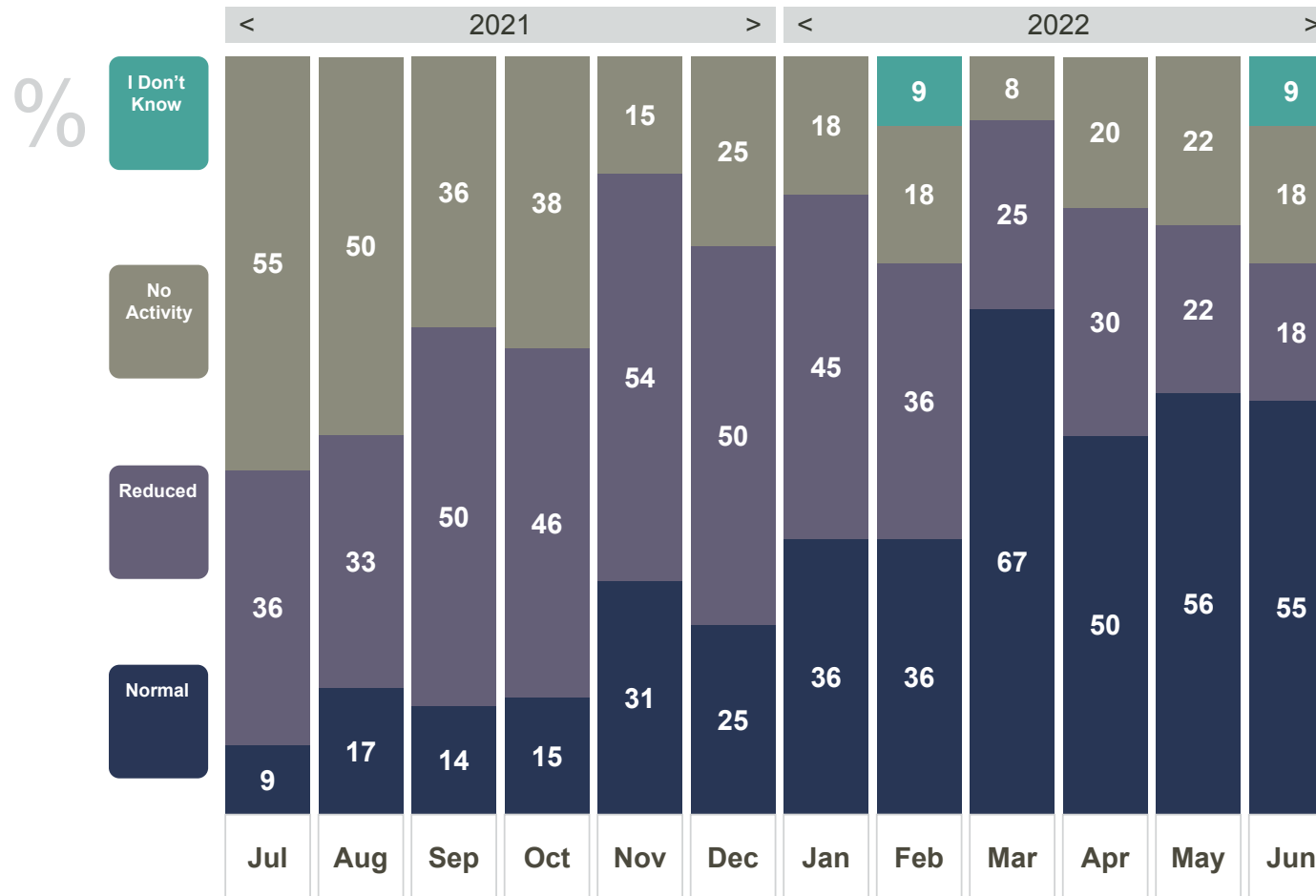
## Climate Change and Net Zero Carbon Events

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



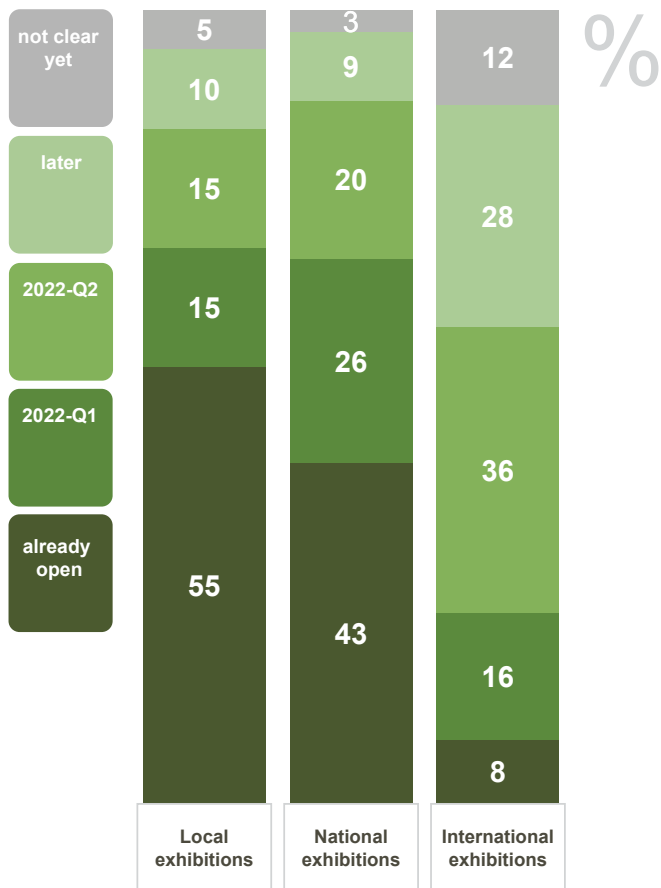


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

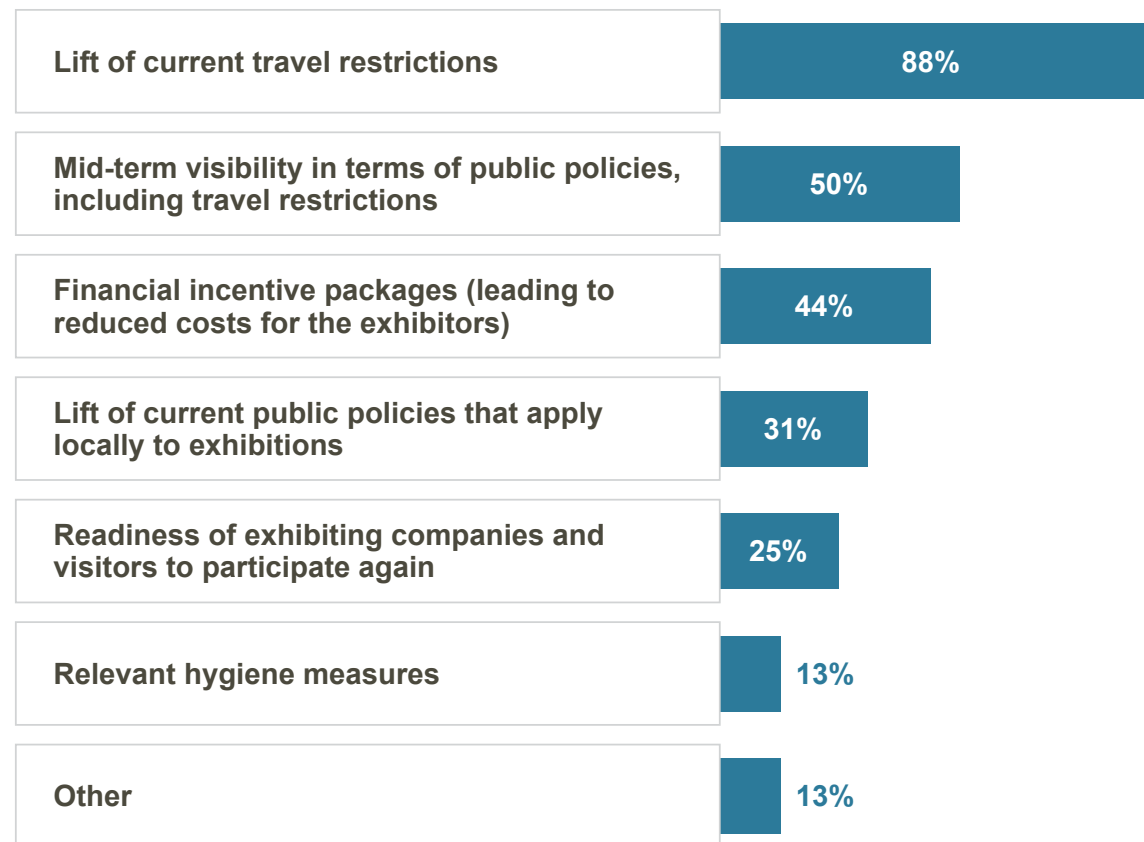




## When do you believe exhibitions will open again in your city?



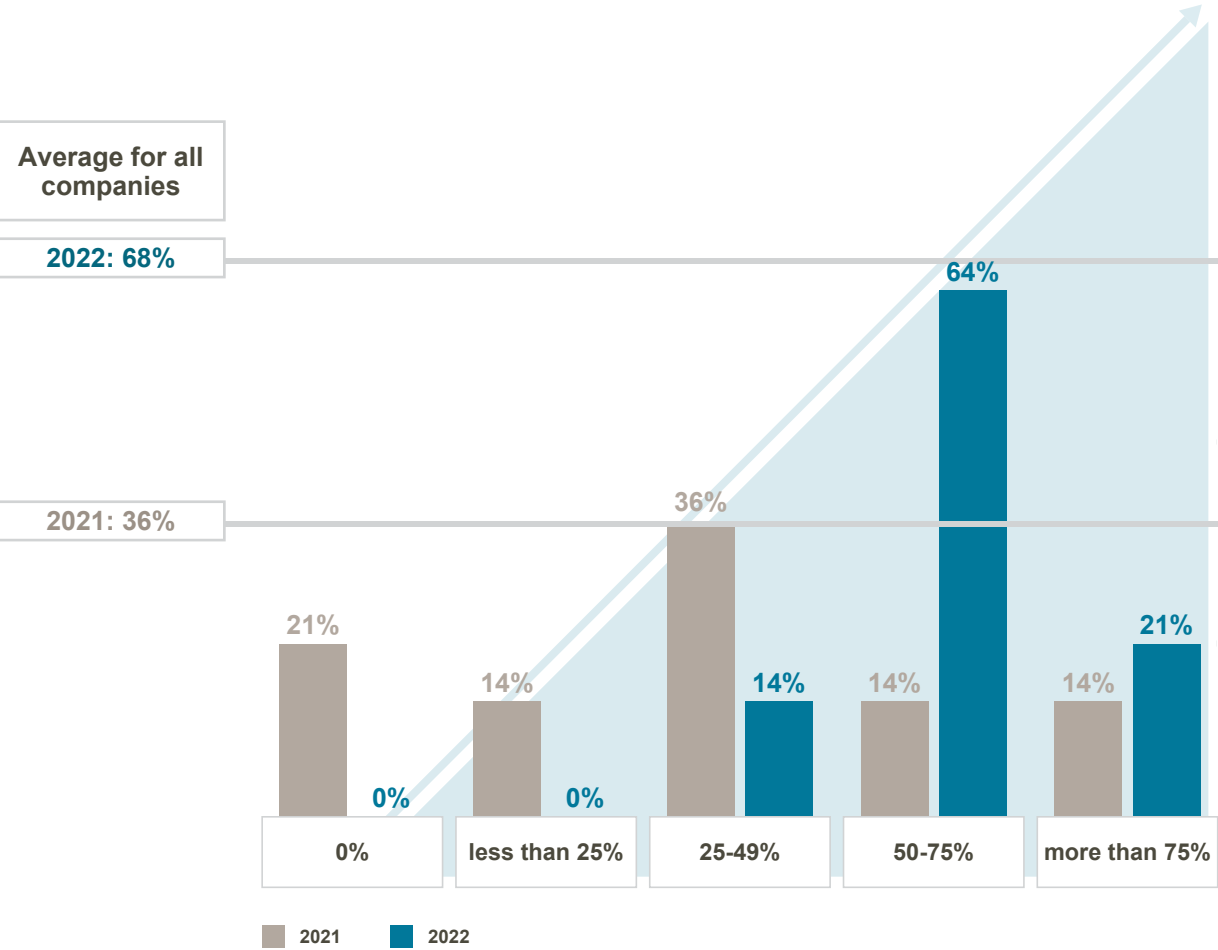
## What do you believe would most help the “bounce back” of exhibitions?



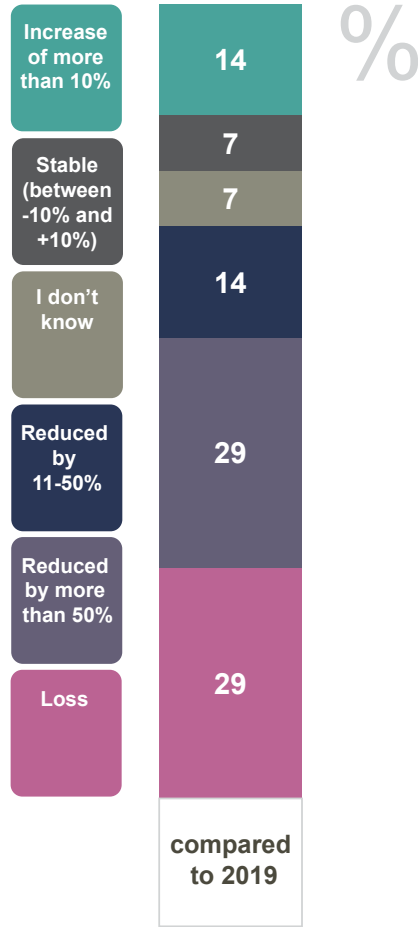
# Detailed results for India



## Revenue compared to 2019



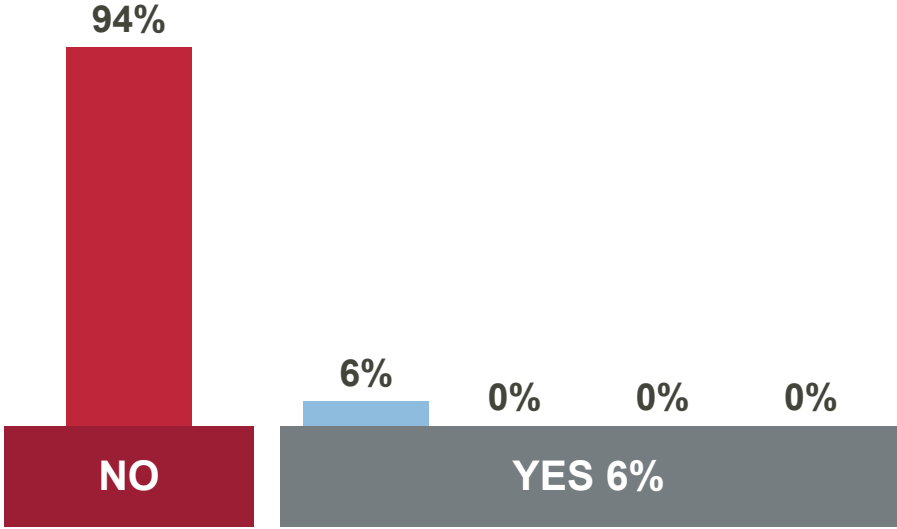
## Operating Profits 2021





## Did your company benefit from public financial support?

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

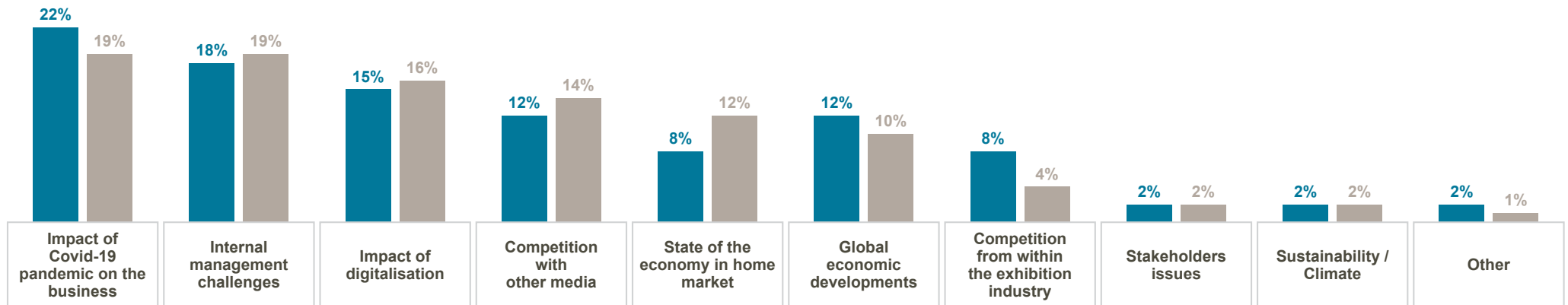






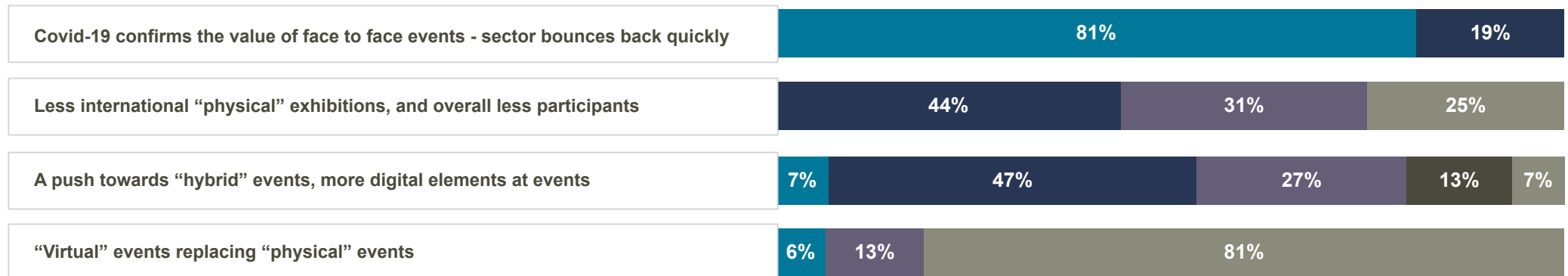
## Most important business issues in the exhibition industry

India Global



## Format of exhibitions in the coming years

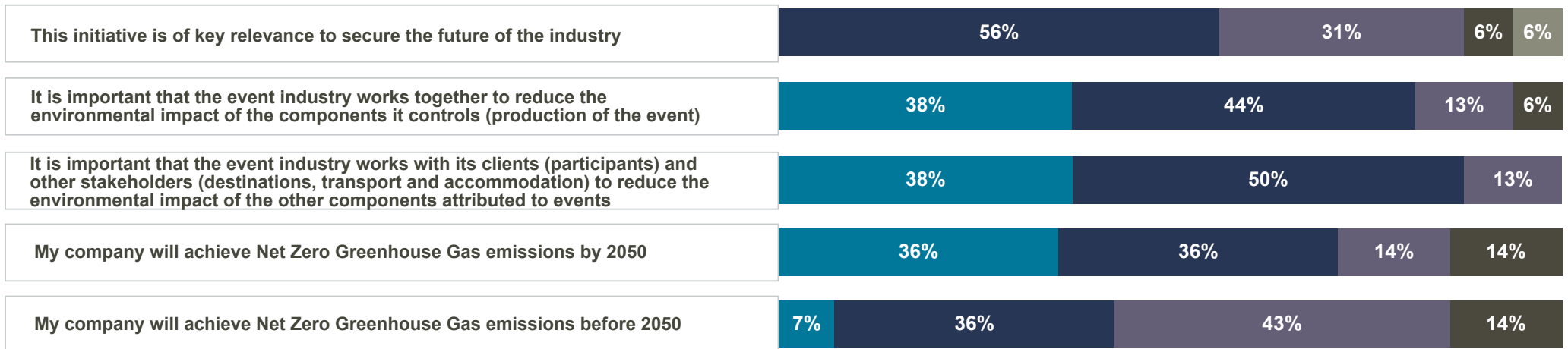
Yes, for sure Most probably Not sure Not sure at all Definitely not

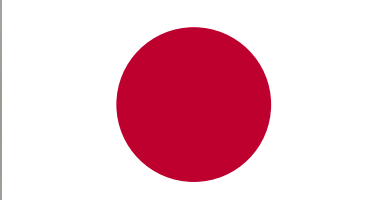




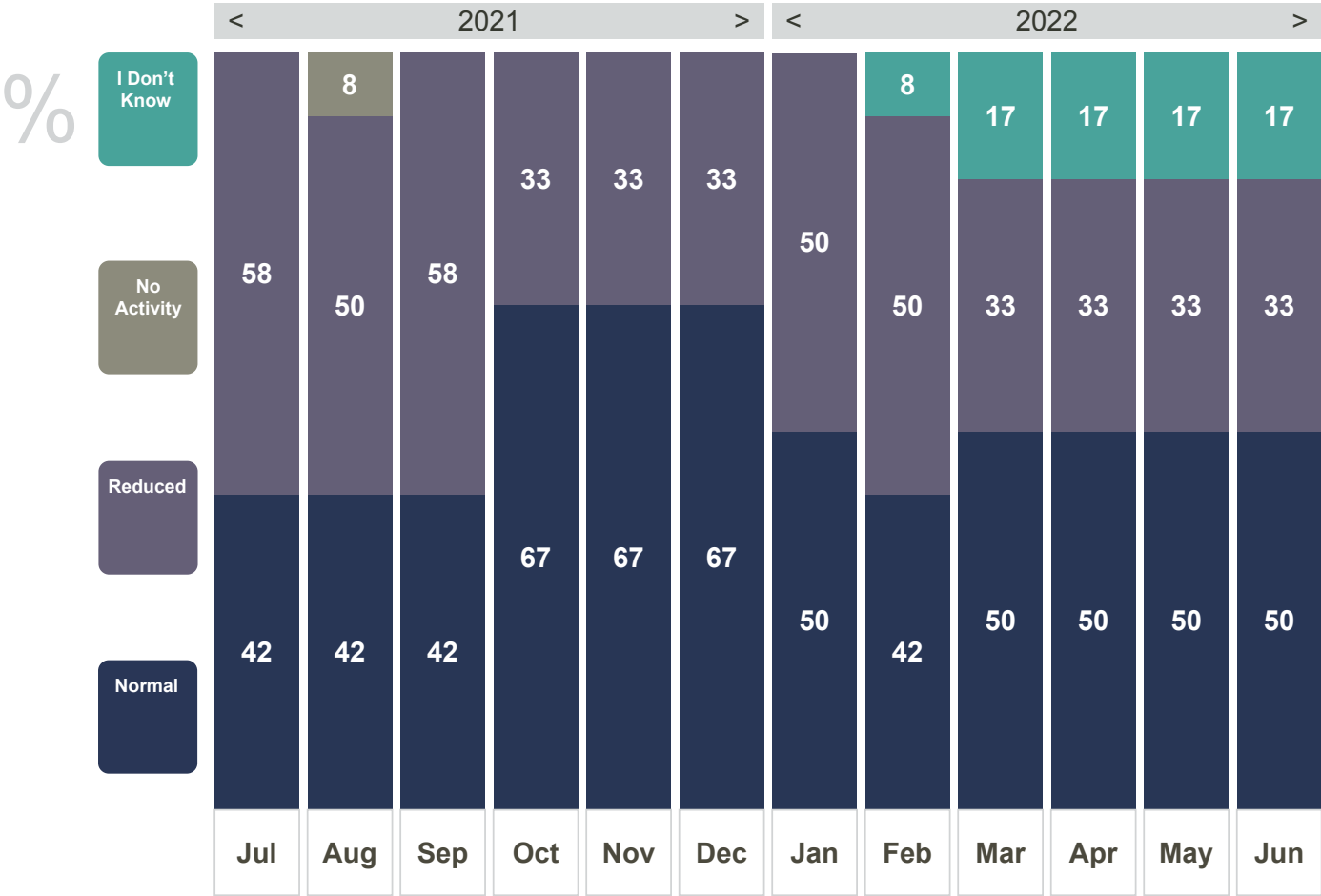
## Climate Change and Net Zero Carbon Events

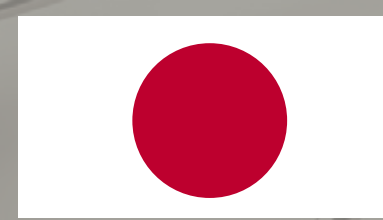
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not



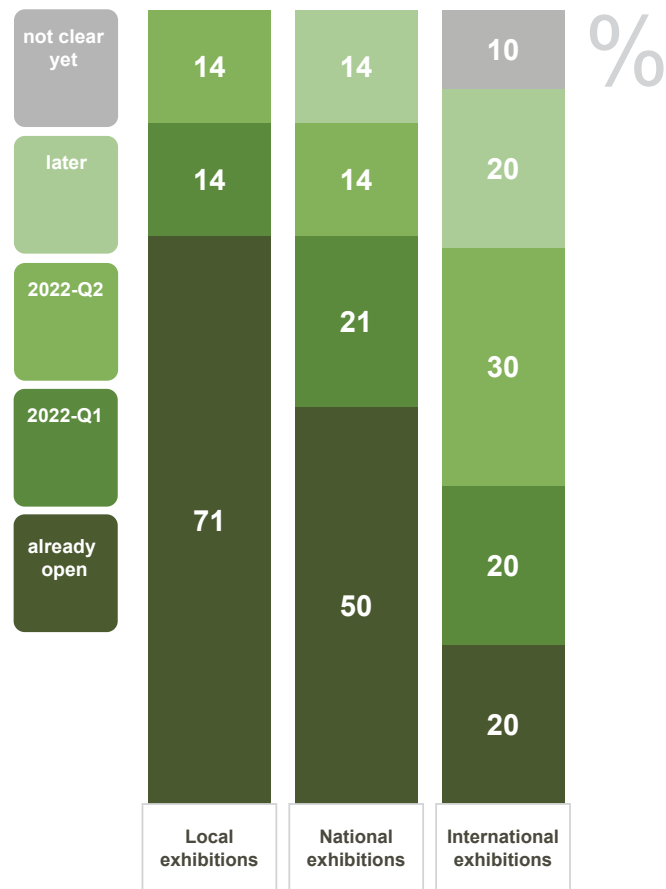


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

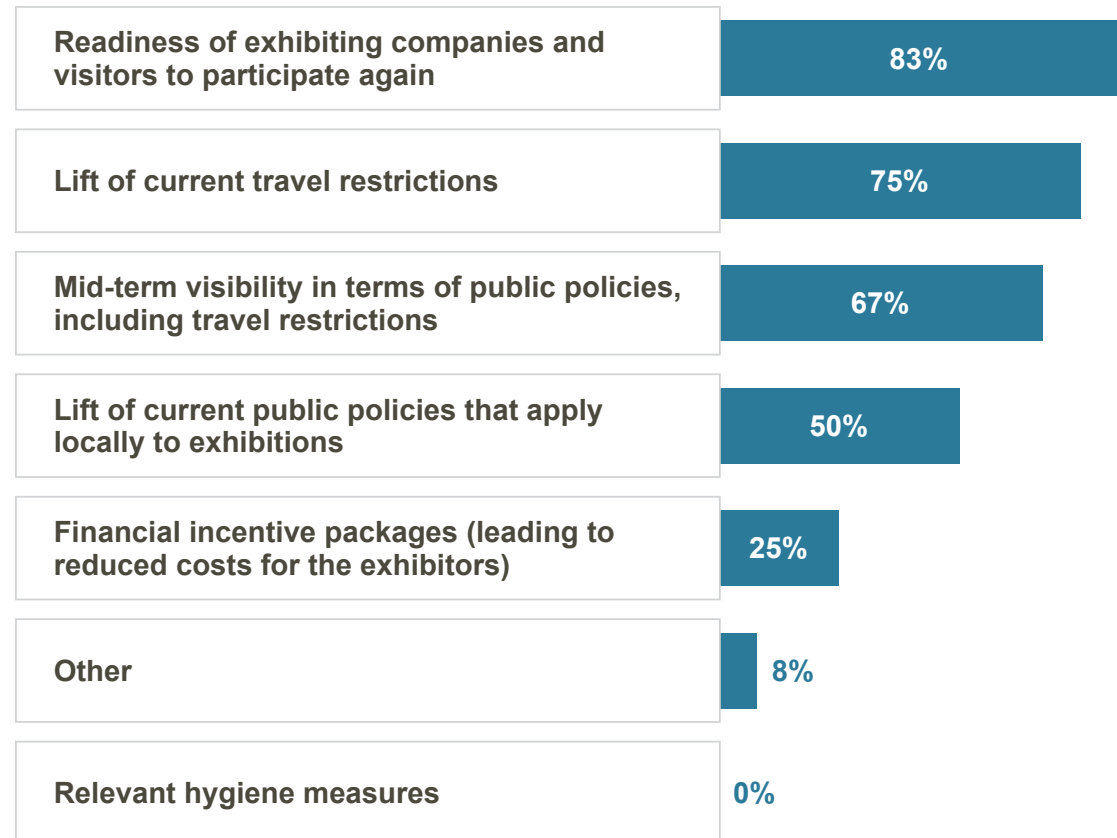


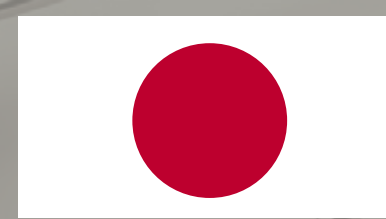


## When do you believe exhibitions will open again in your city?

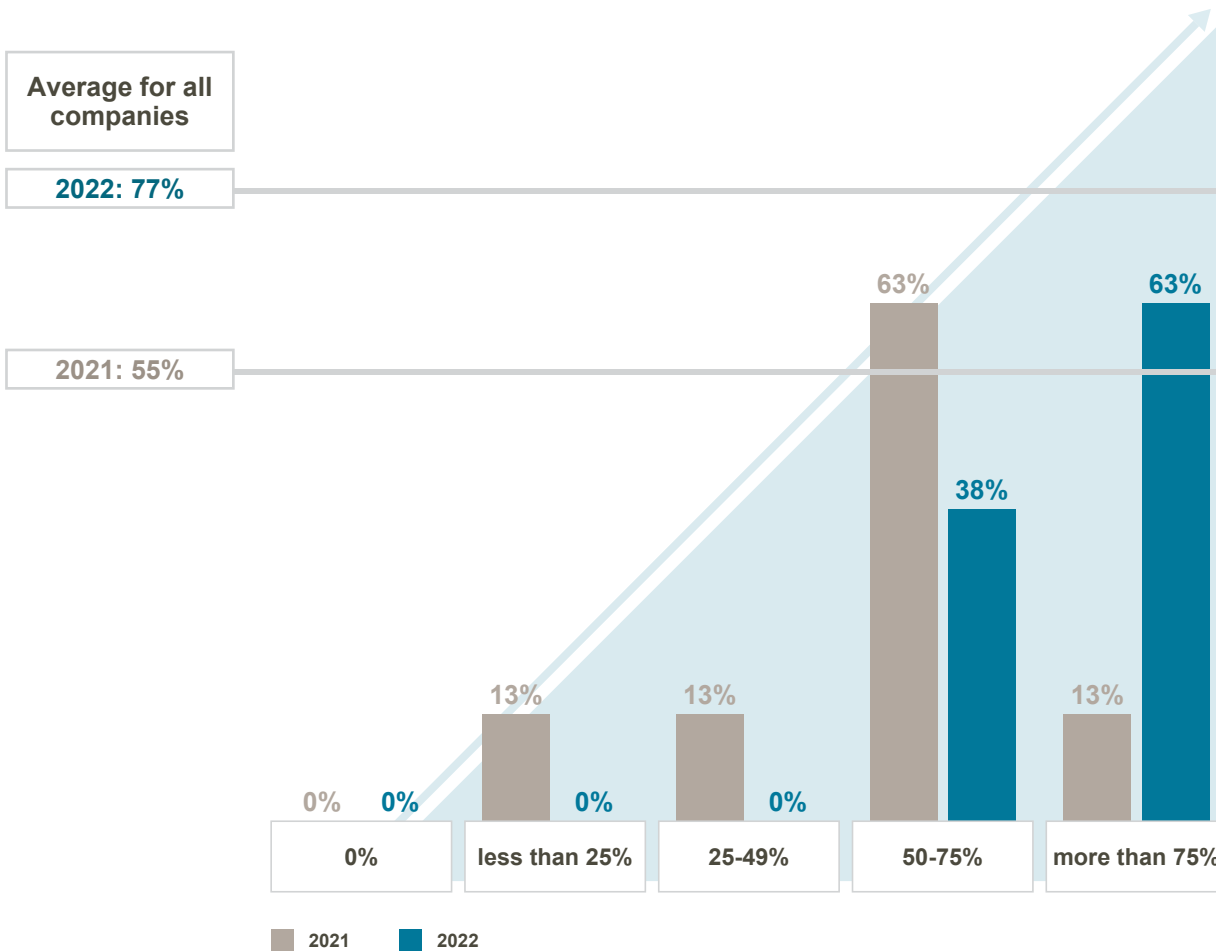


## What do you believe would most help the “bounce back” of exhibitions?

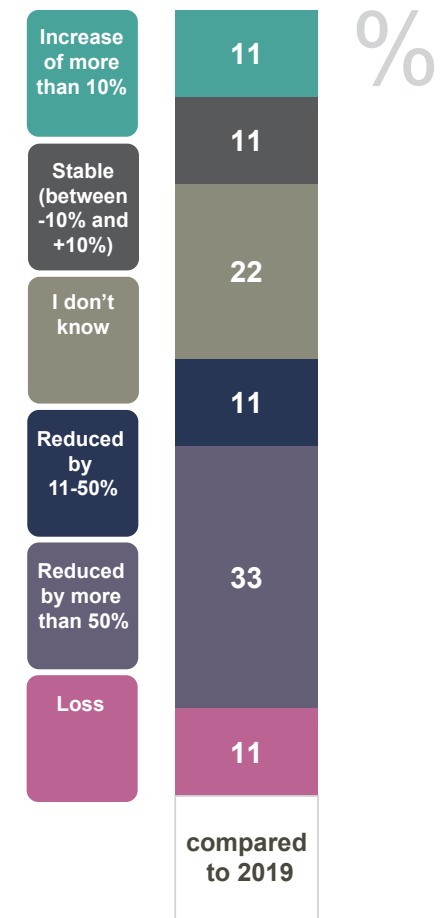


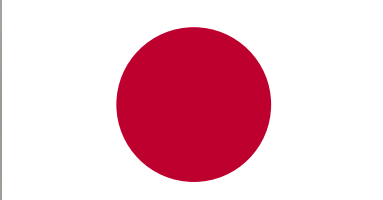


## Revenue compared to 2019



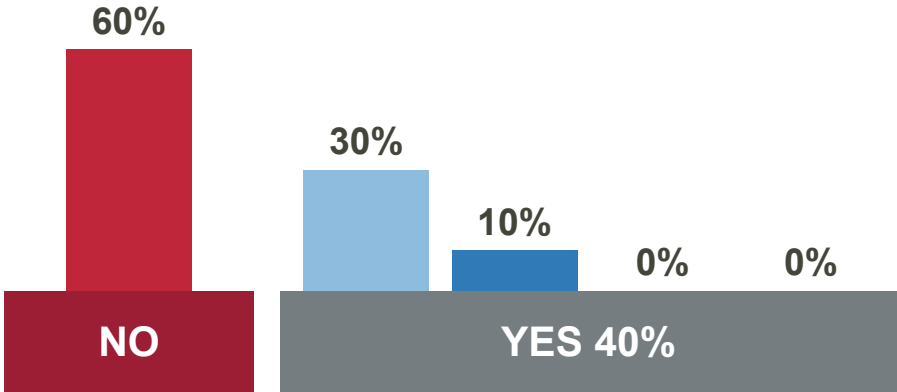
## Operating Profits 2021

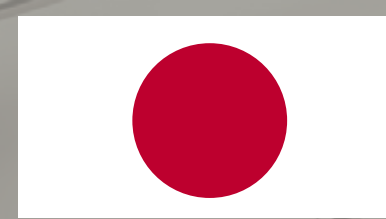




## Did your company benefit from public financial support?

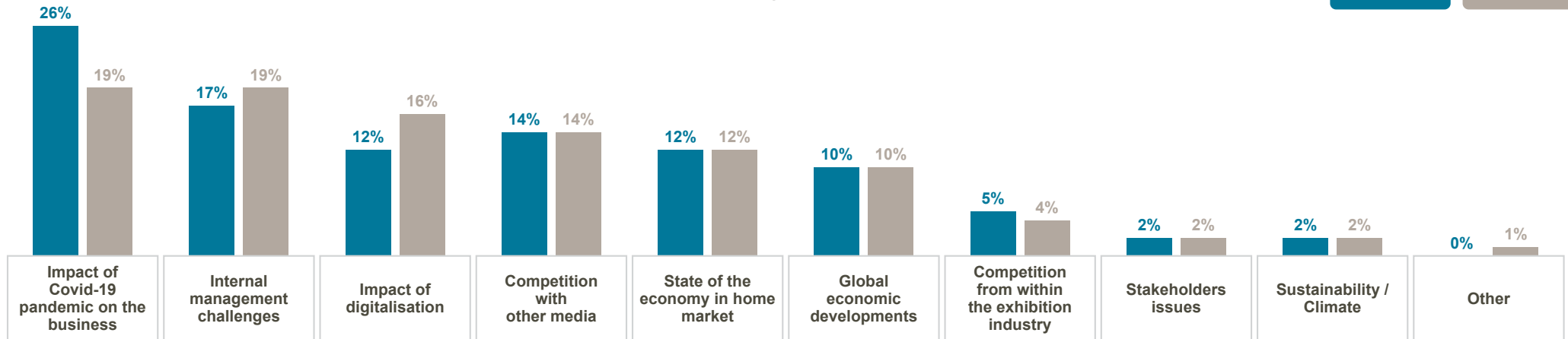
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





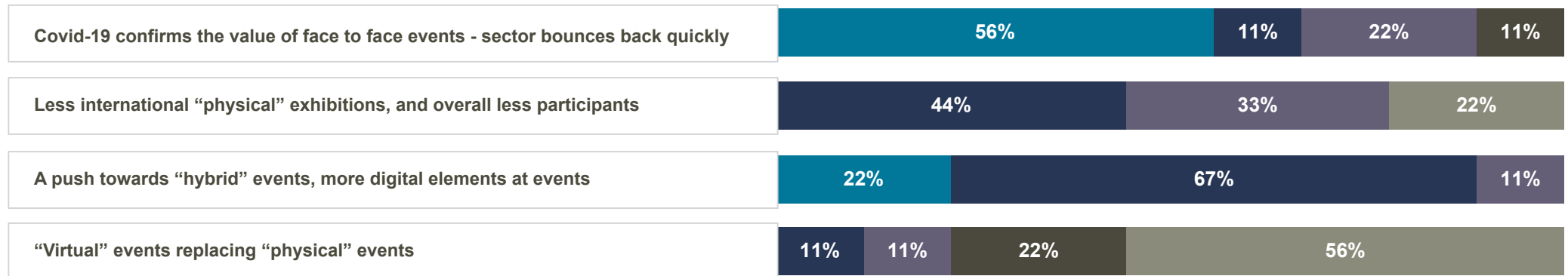
## Most important business issues in the exhibition industry

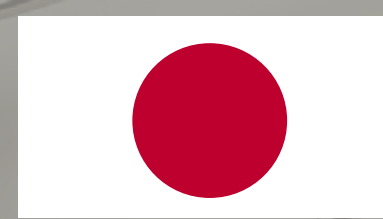
Japan Global



## Format of exhibitions in the coming years

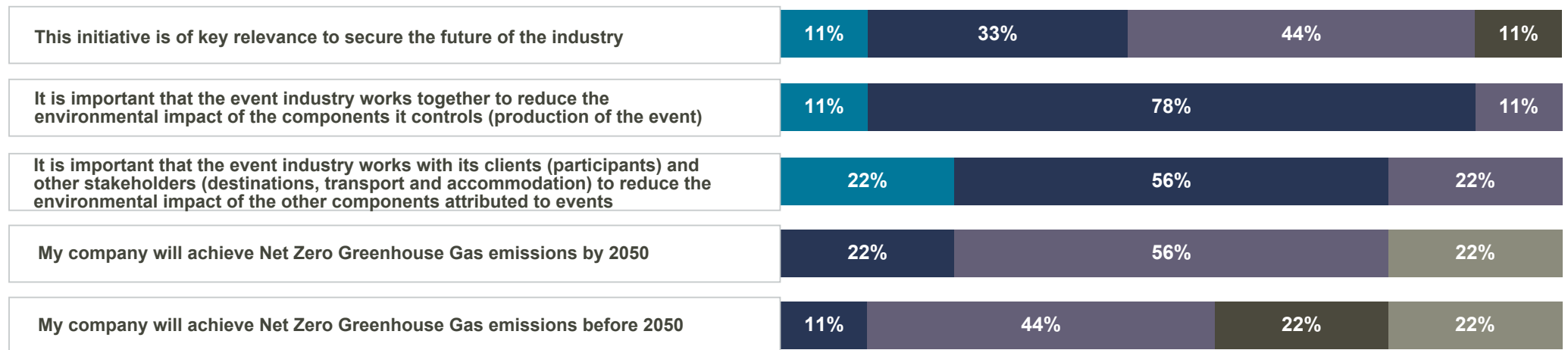
Yes, for sure Most probably Not sure Not sure at all Definitely not



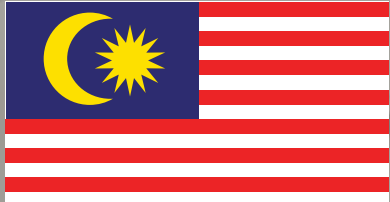


## Climate Change and Net Zero Carbon Events

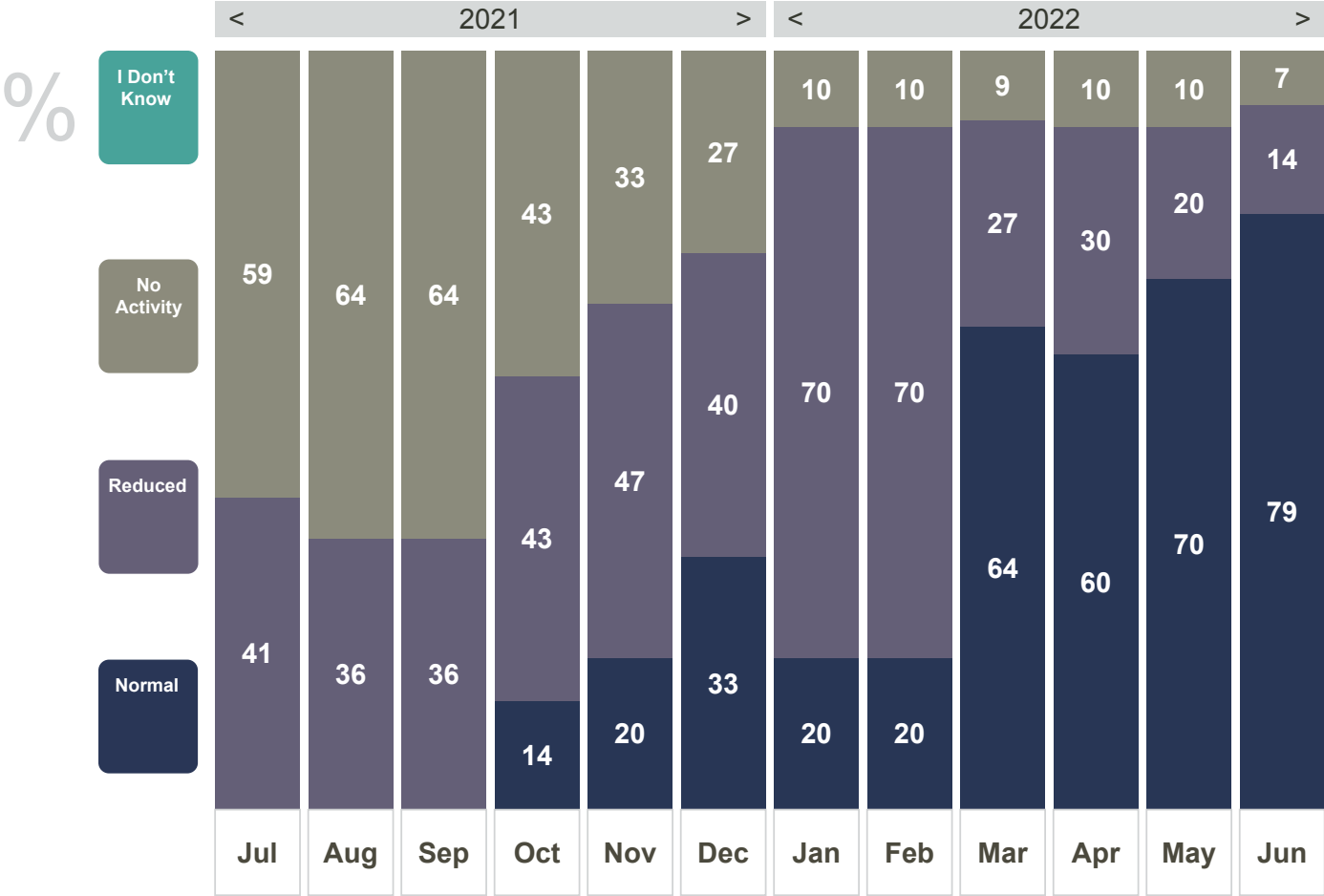
■ Yes, for sure  
 ■ Most probably  
 ■ Not sure  
 ■ Not sure at all  
 ■ Definitely not

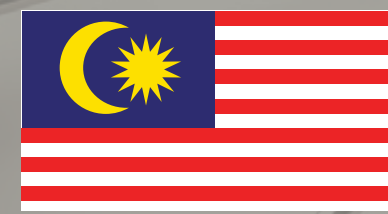




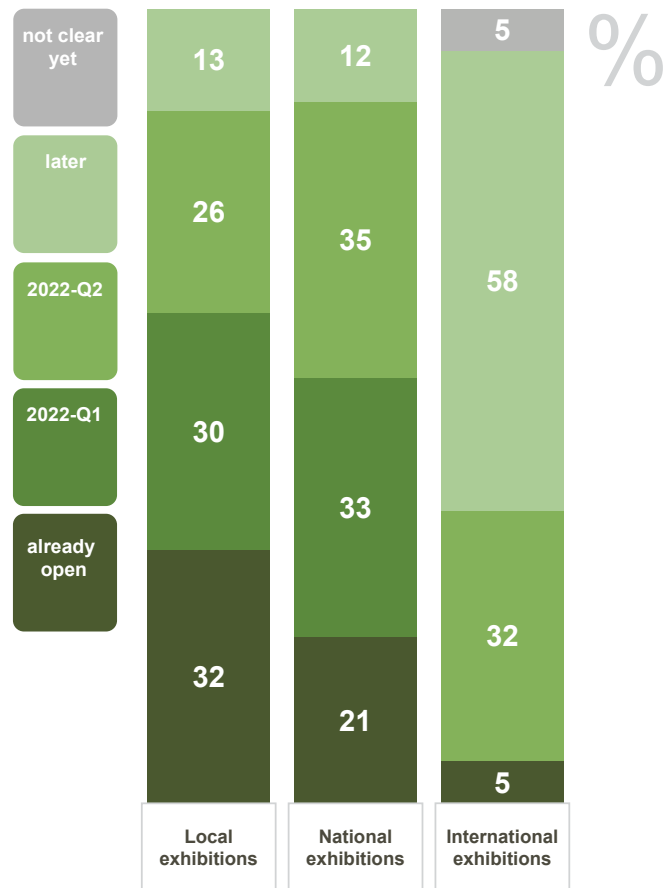


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

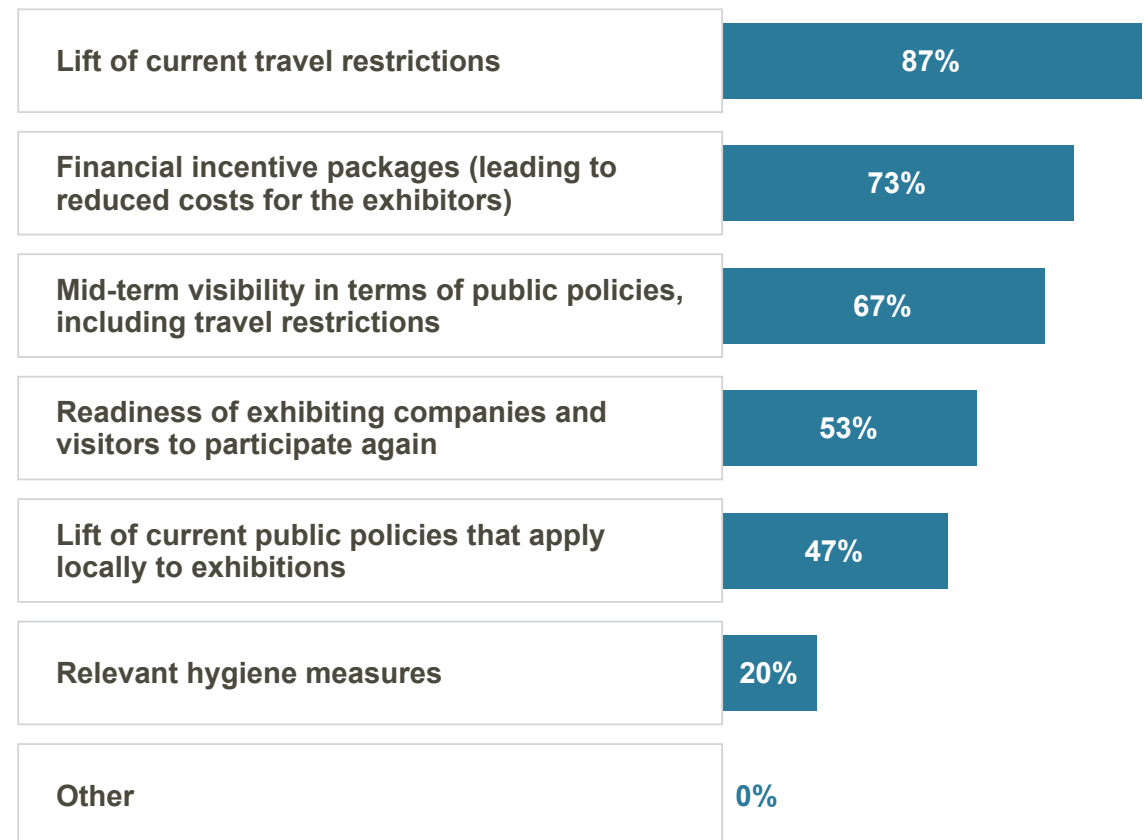


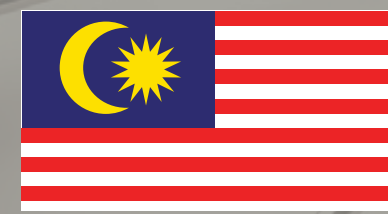


## When do you believe exhibitions will open again in your city?

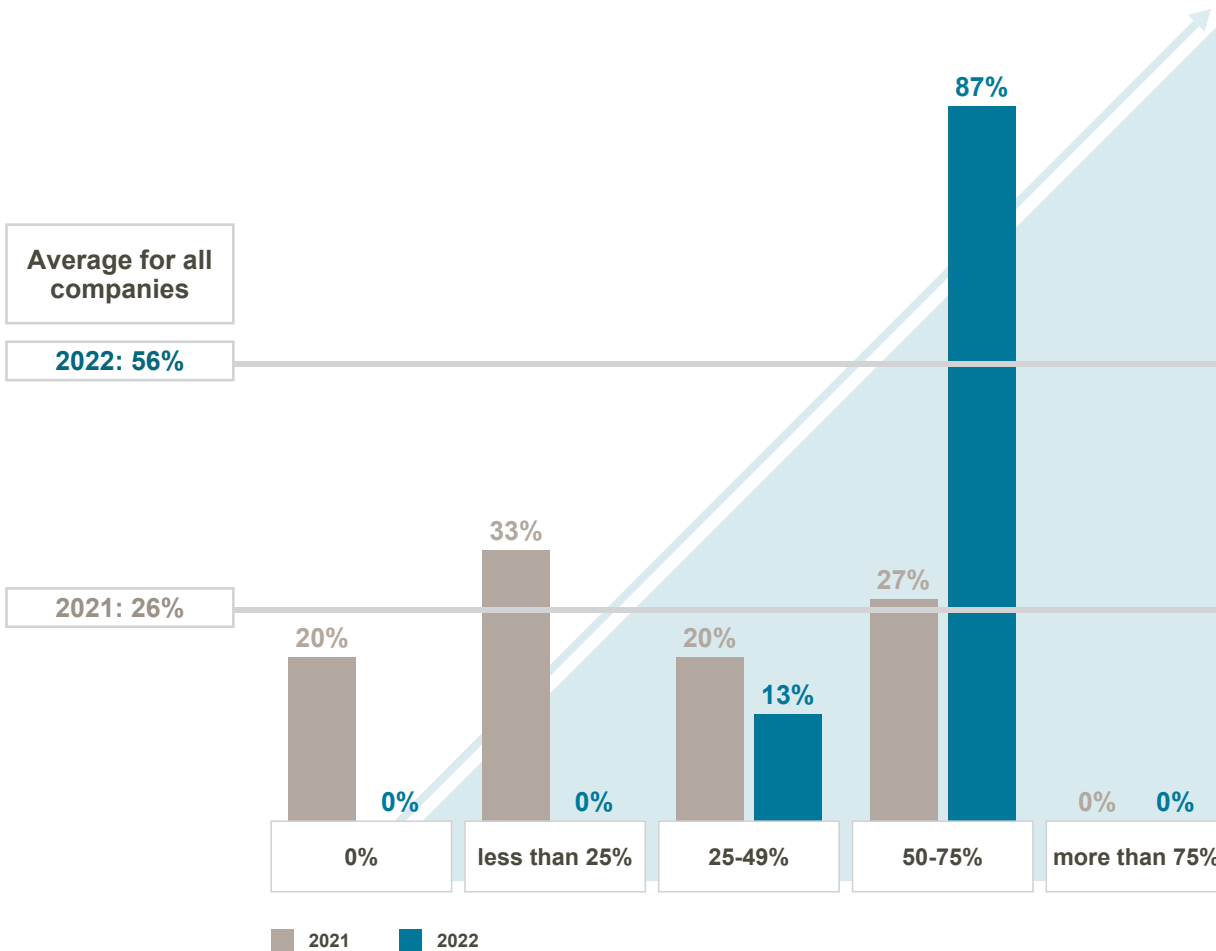


## What do you believe would most help the “bounce back” of exhibitions?

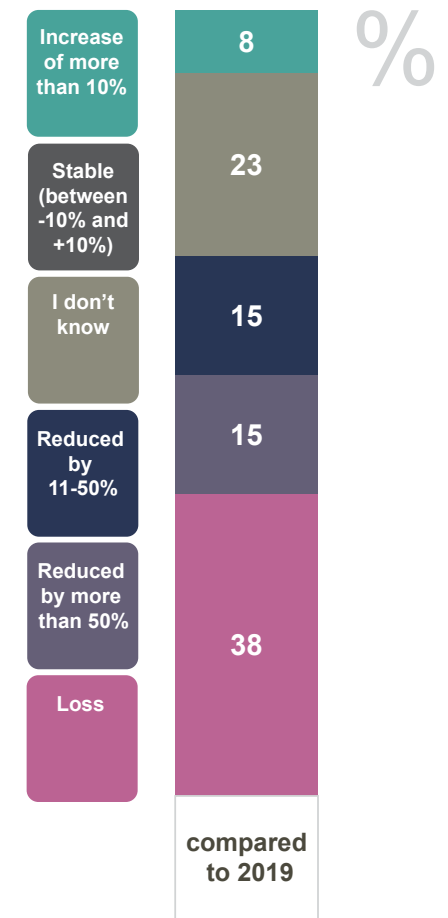


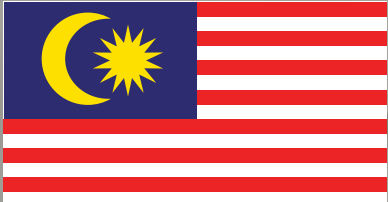


## Revenue compared to 2019



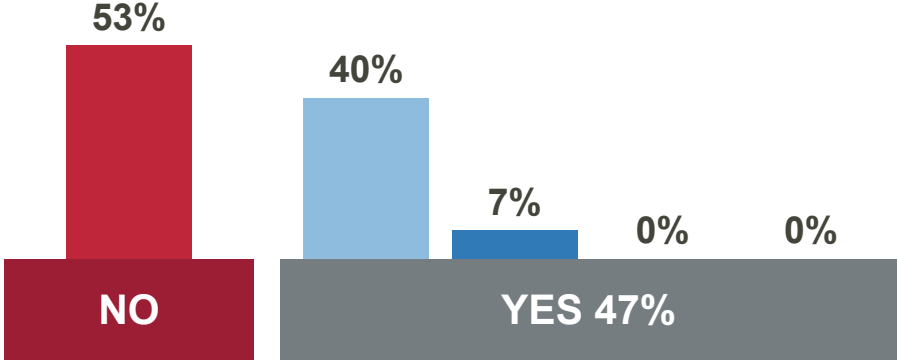
## Operating Profits 2021

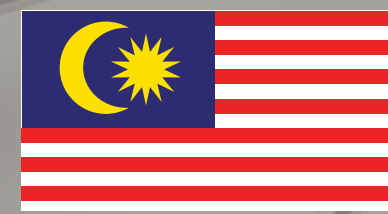




## Did your company benefit from public financial support?

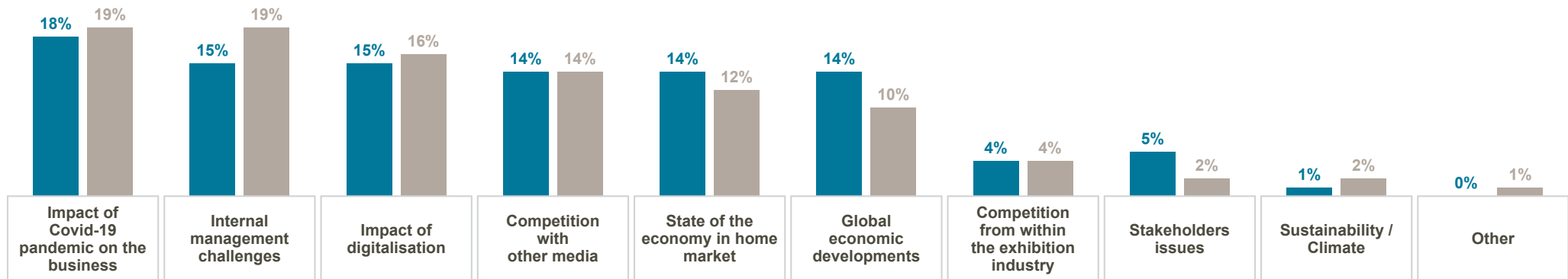
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





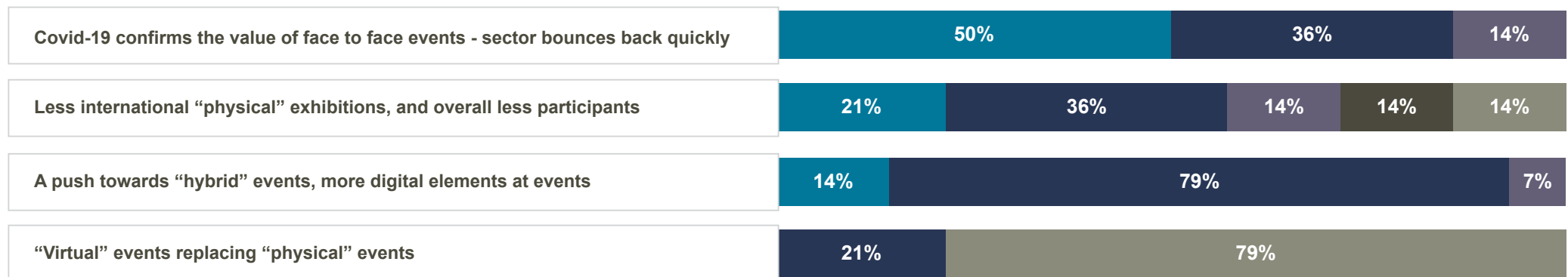
## Most important business issues in the exhibition industry

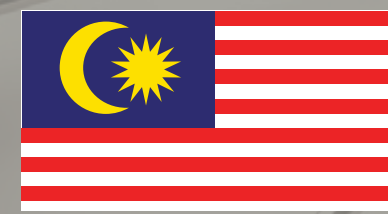
Malaysia Global



## Format of exhibitions in the coming years

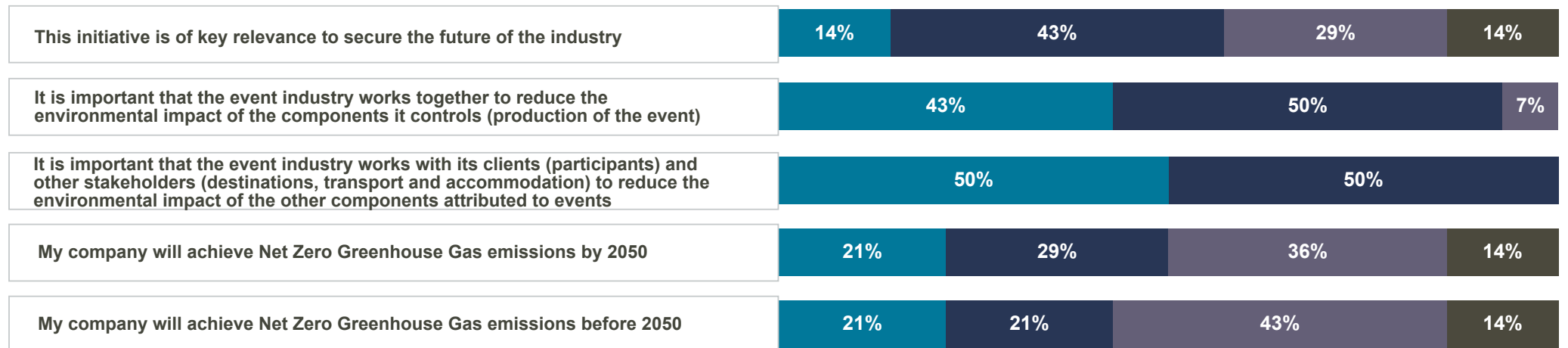
Yes, for sure Most probably Not sure Not sure at all Definitely not





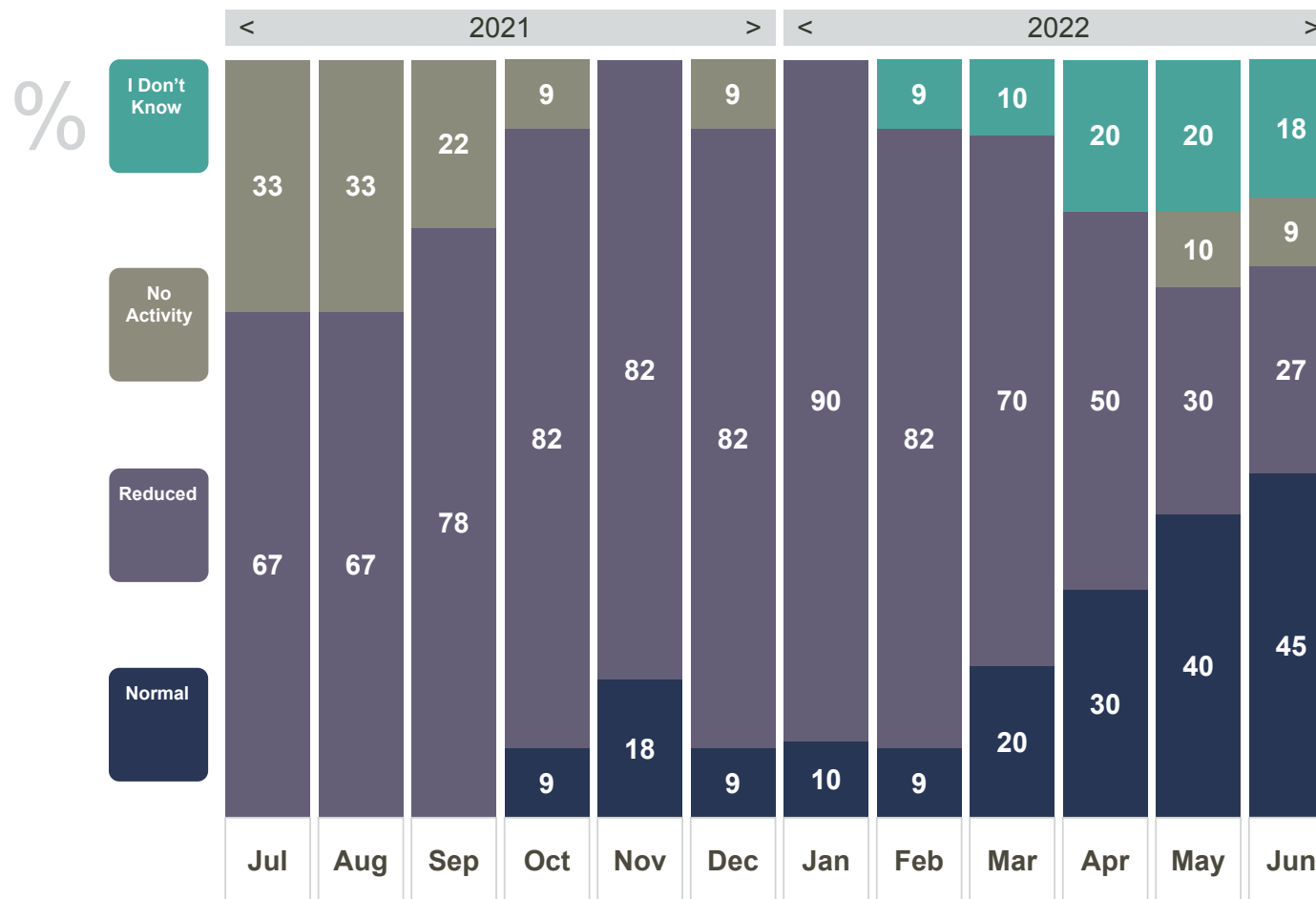
## Climate Change and Net Zero Carbon Events

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



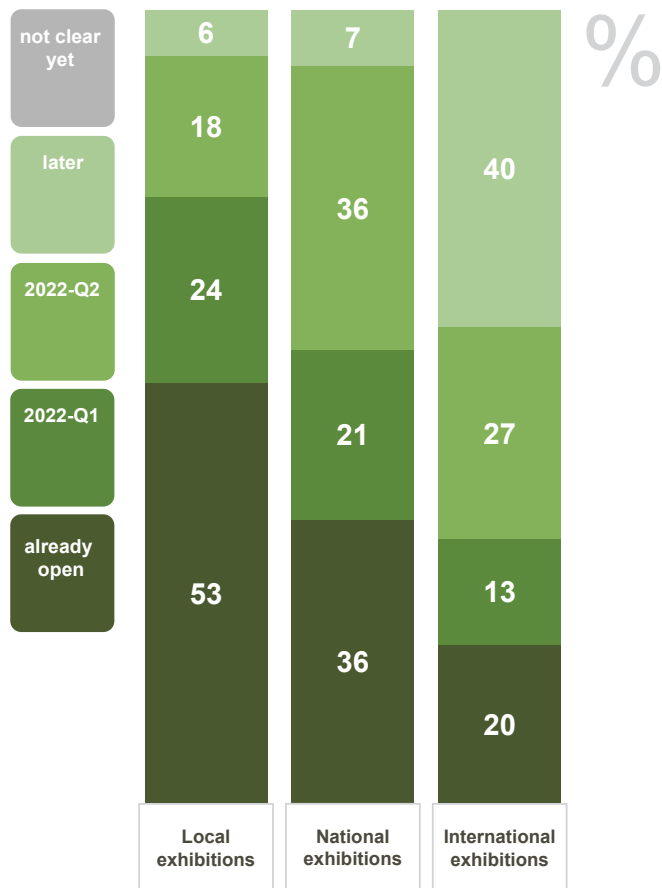


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

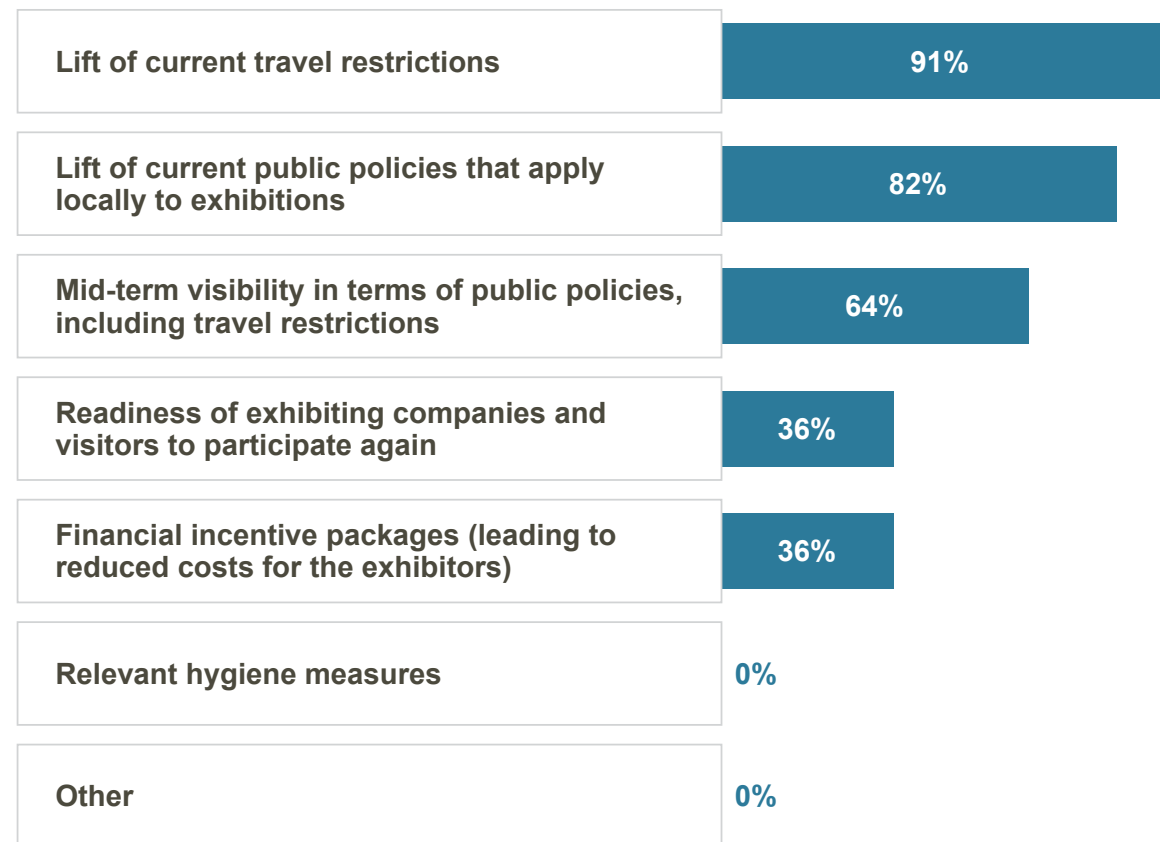




## When do you believe exhibitions will open again in your city?



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

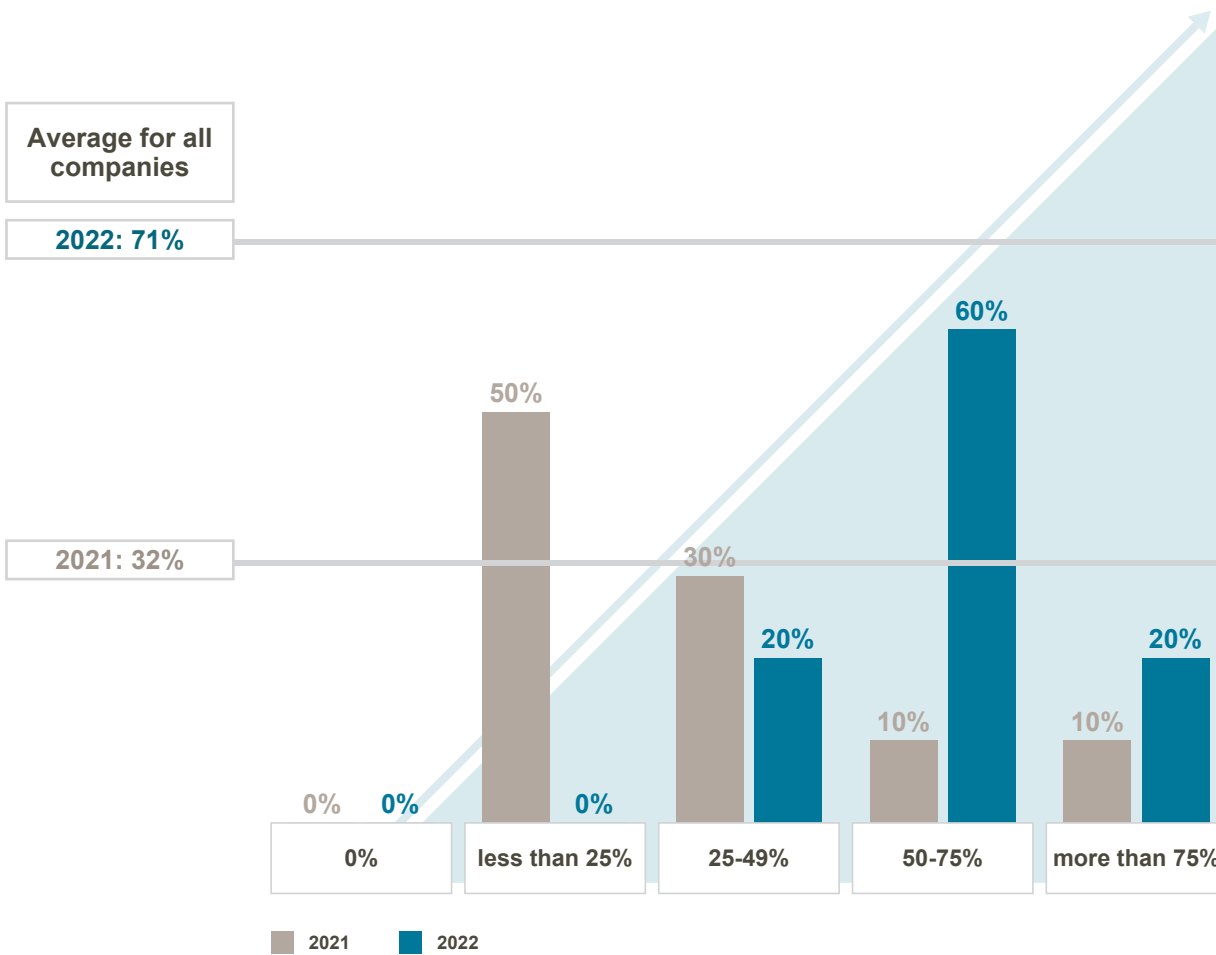




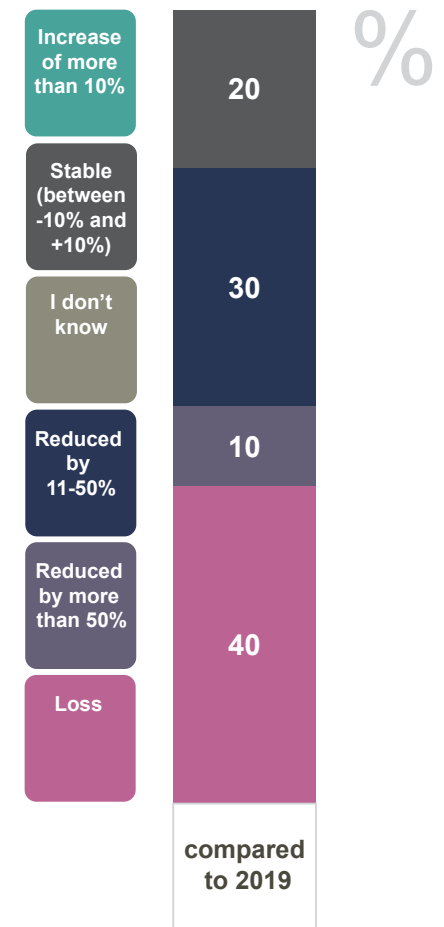
# Detailed results for Singapore



## Revenue compared to 2019



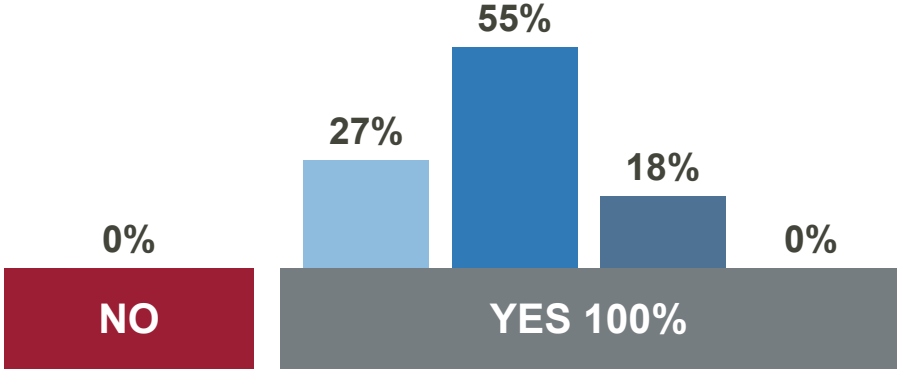
## Operating Profits 2021





## Did your company benefit from public financial support?

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



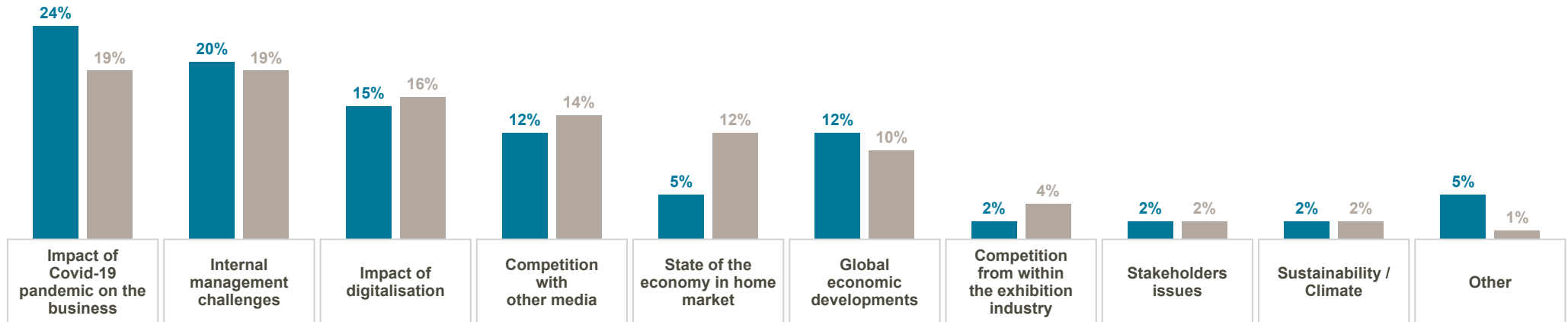
# Detailed results for Singapore



## Most important business issues in the exhibition industry

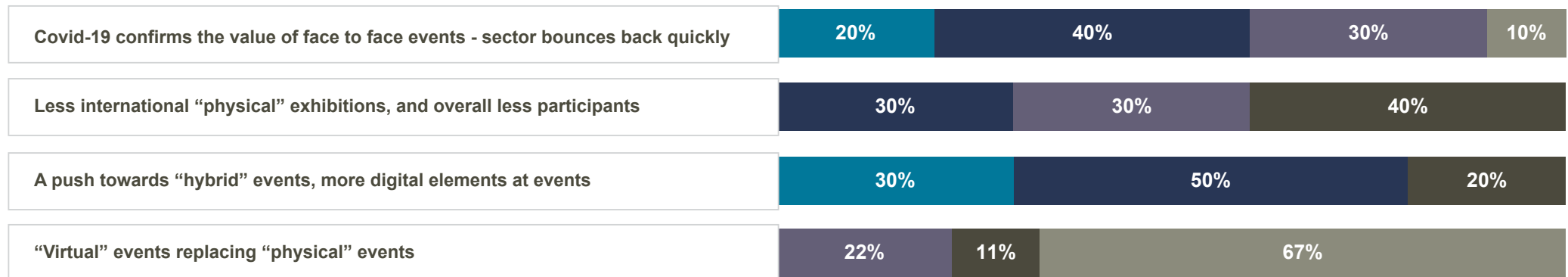
Singapore

Global



## Format of exhibitions in the coming years

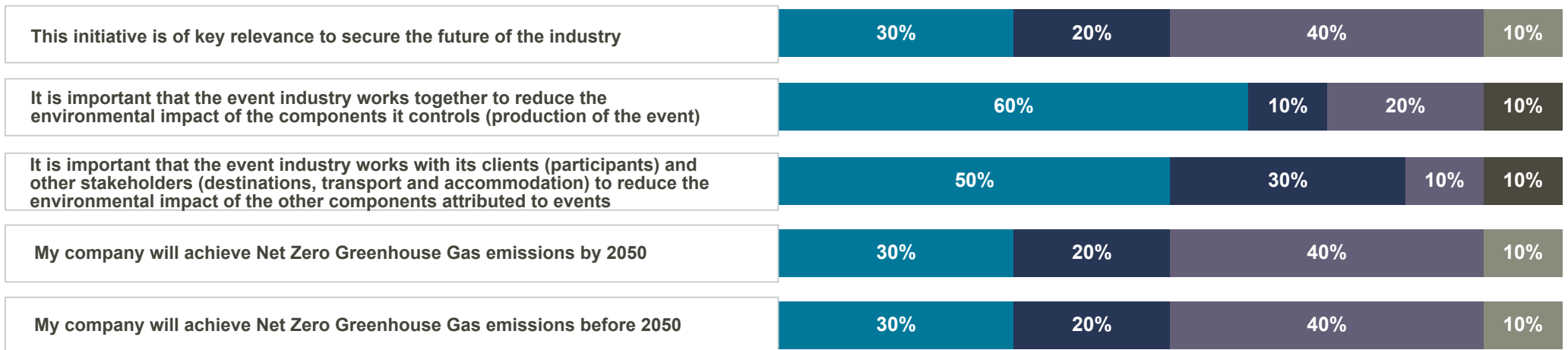
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not

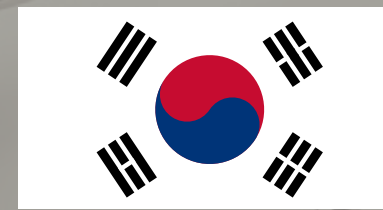




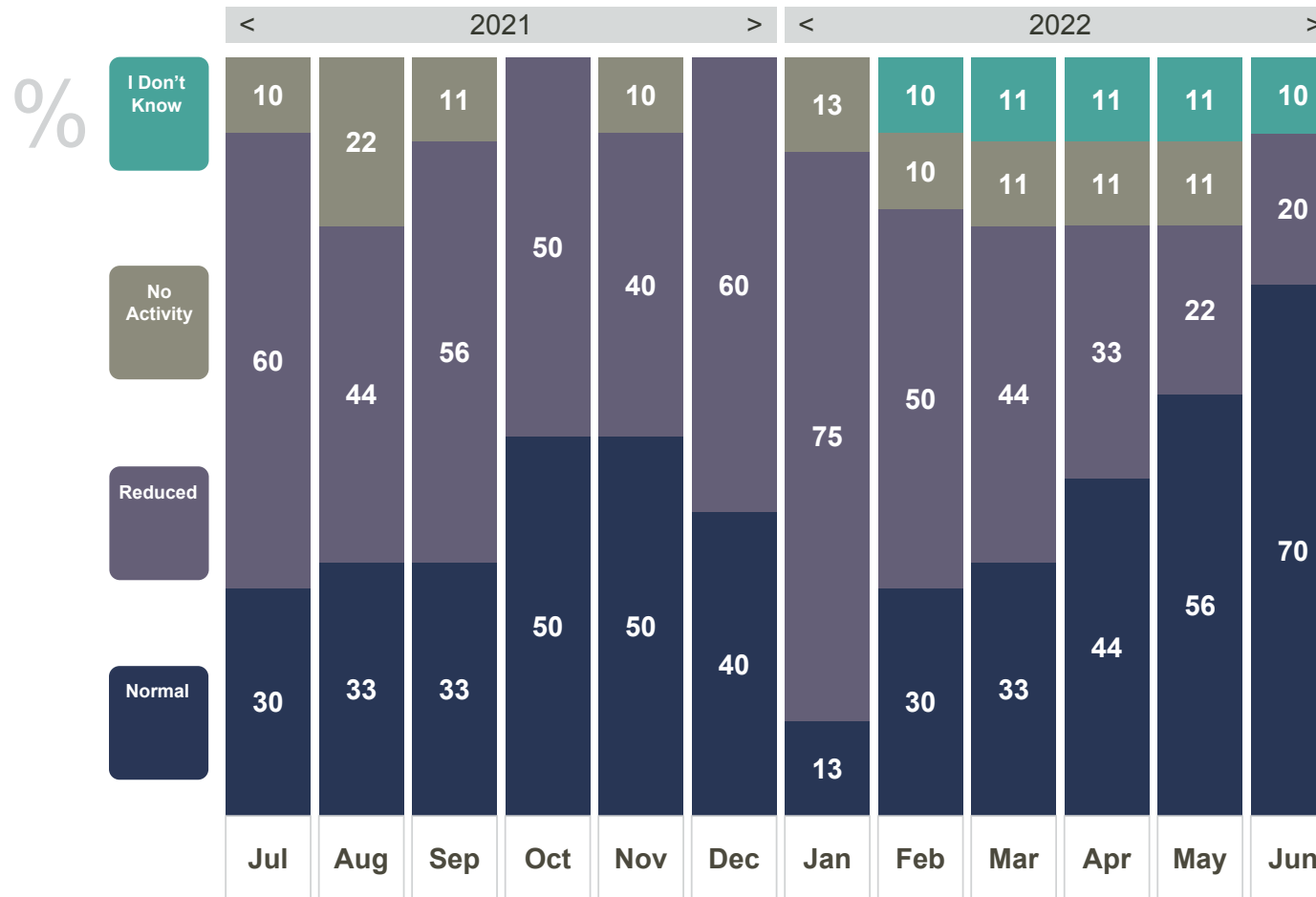
## Climate Change and Net Zero Carbon Events

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



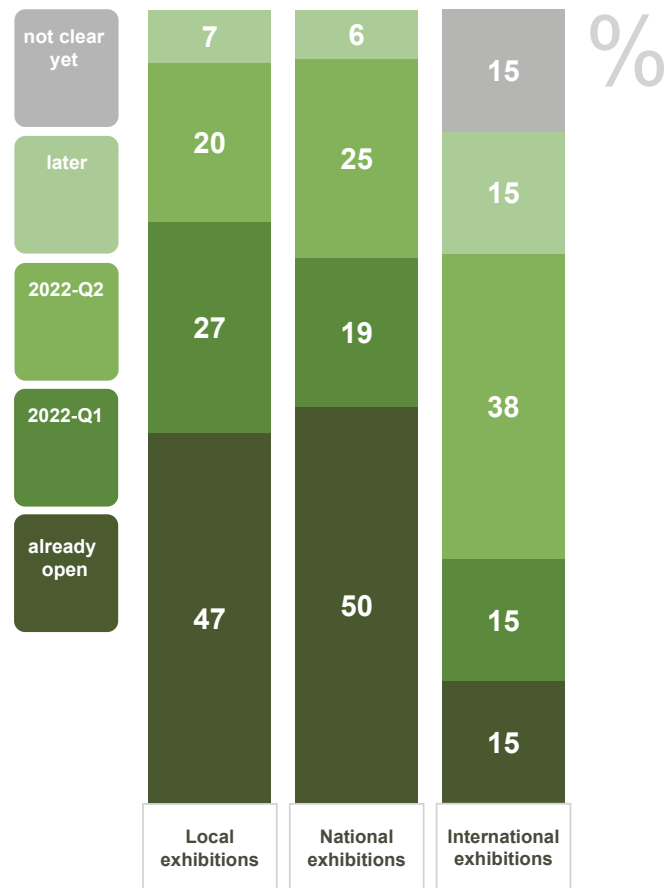


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

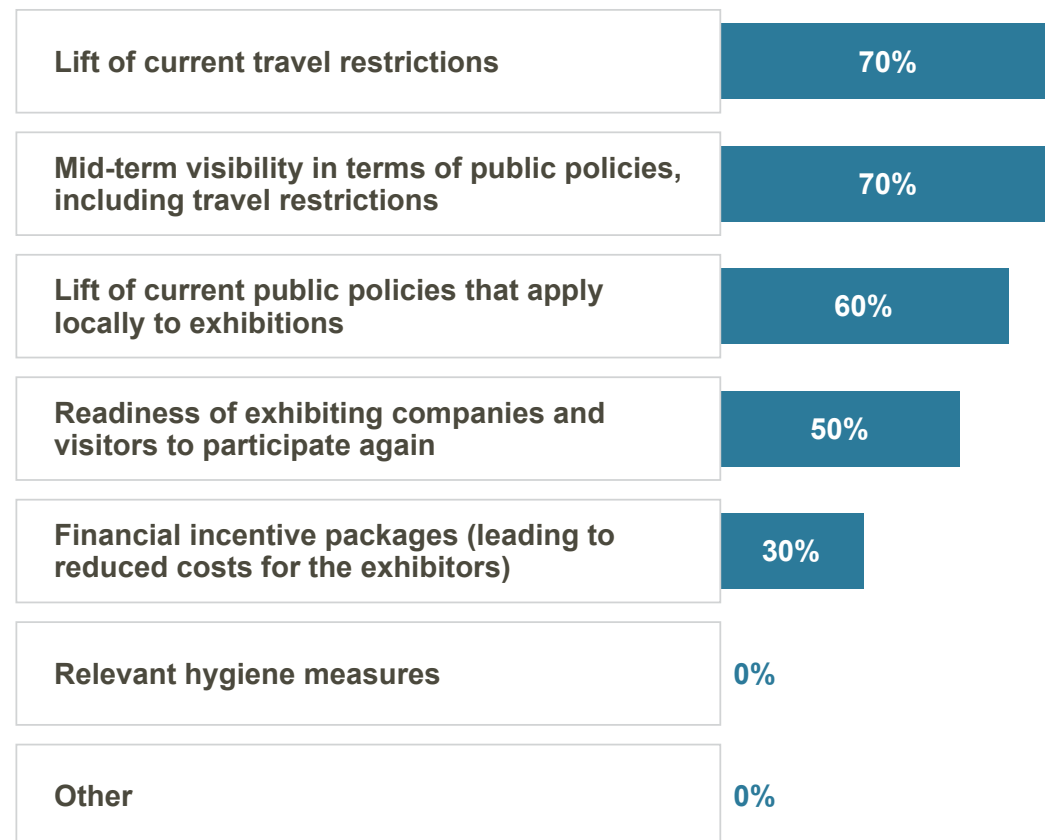




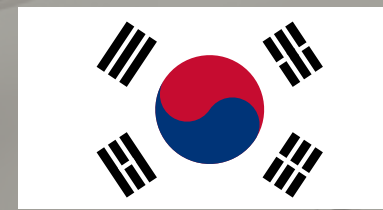
## When do you believe exhibitions will open again in your city?



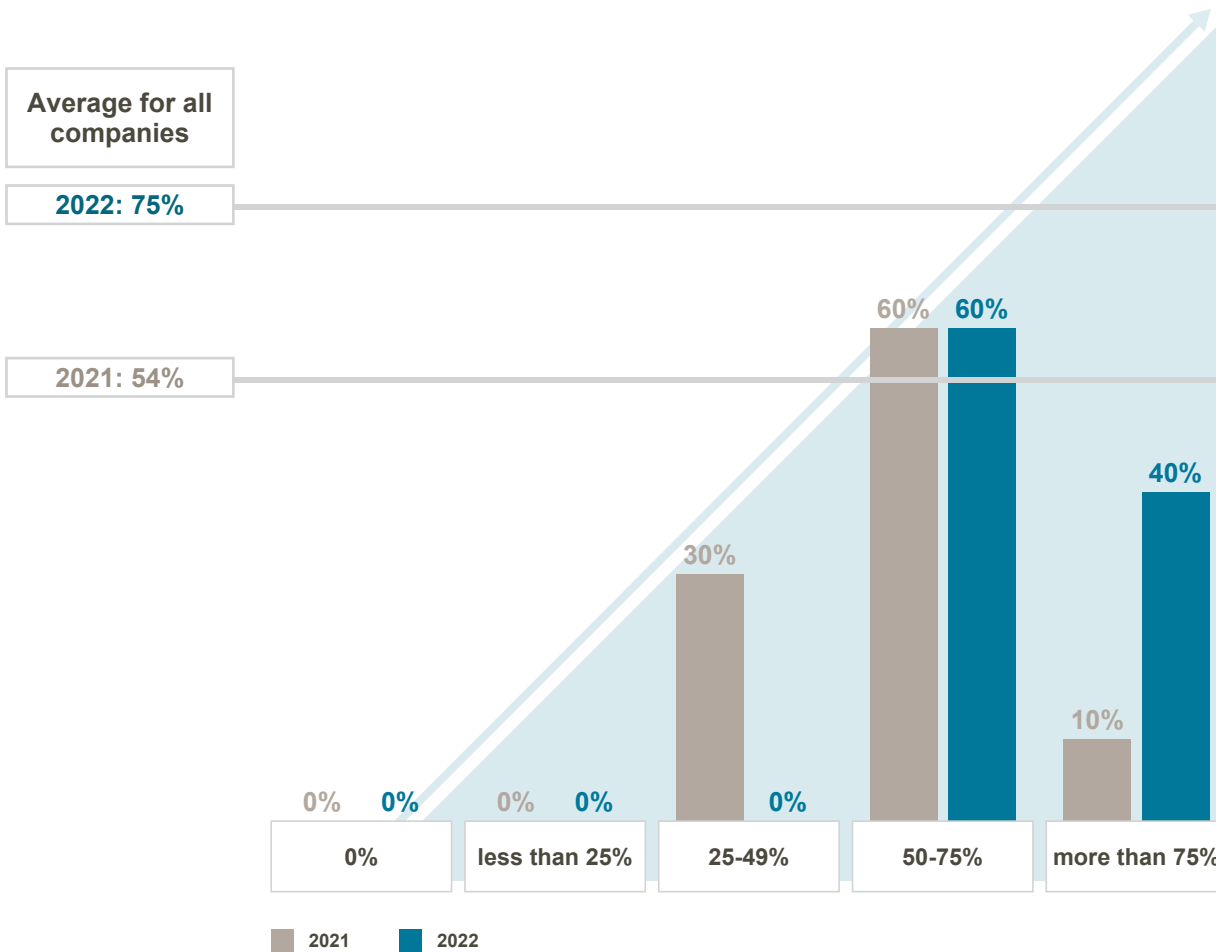
## What do you believe would most help the “bounce back” of exhibitions?



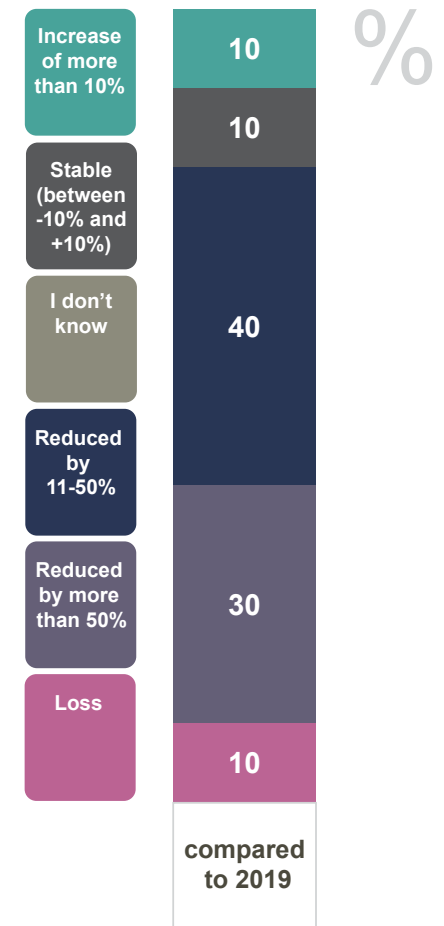
# Detailed results for South Korea



## Revenue compared to 2019



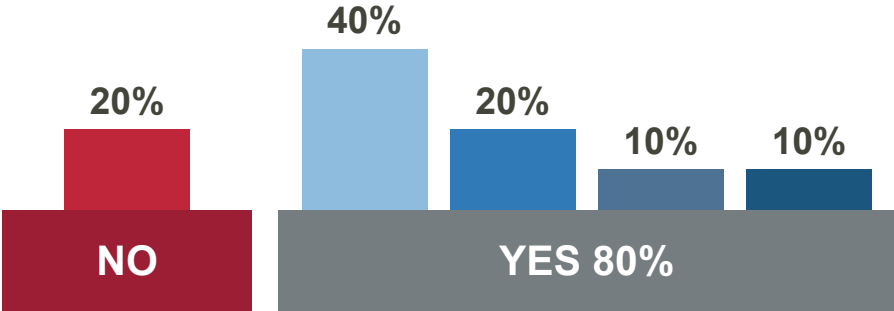
## Operating Profits 2021





## Did your company benefit from public financial support?

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



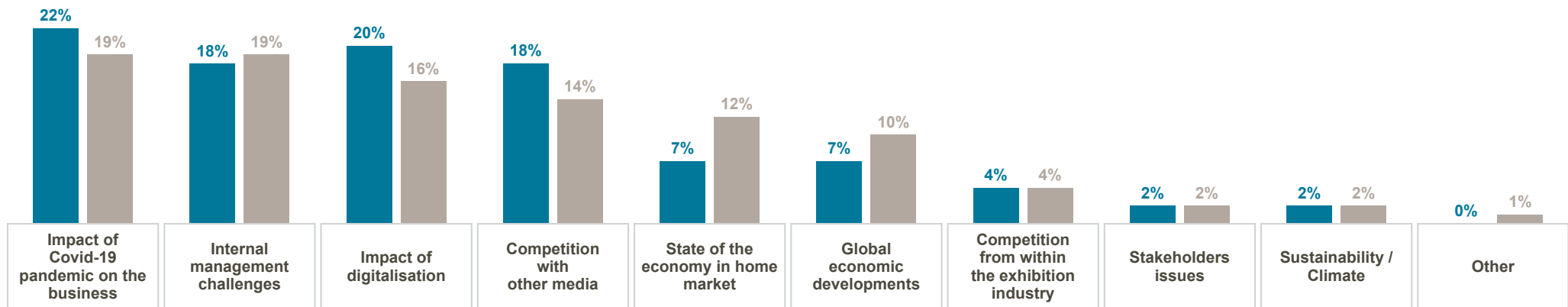


# Detailed results for South Korea



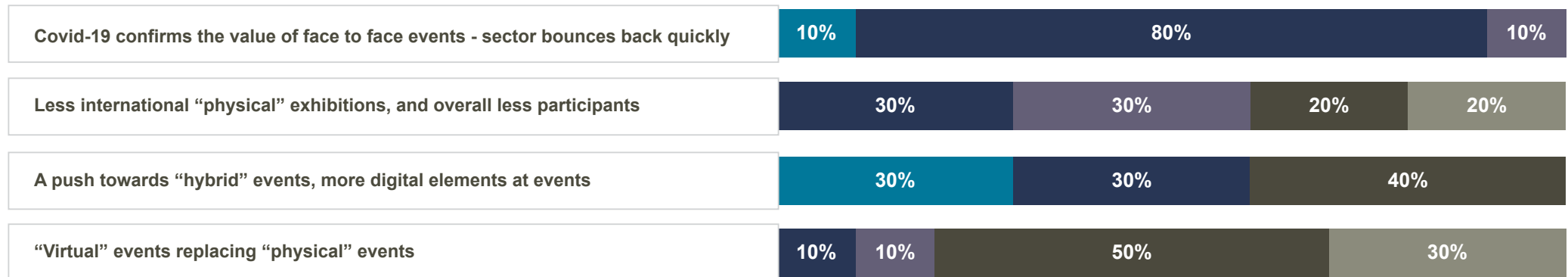
## Most important business issues in the exhibition industry

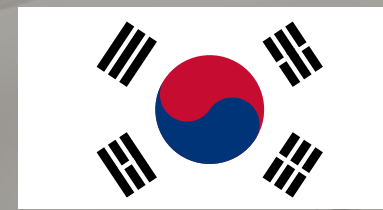
South Korea Global



## Format of exhibitions in the coming years

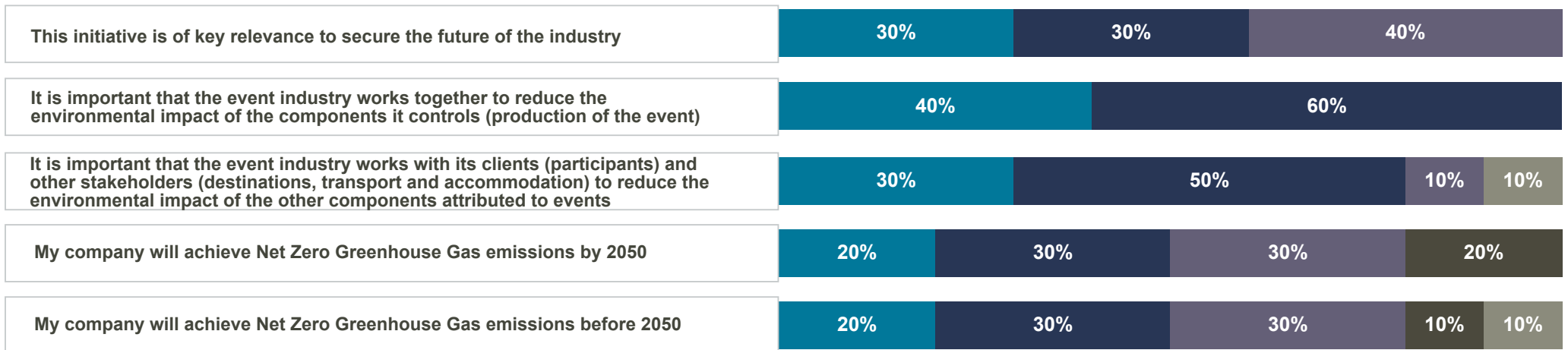
Yes, for sure Most probably Not sure Not sure at all Definitely not





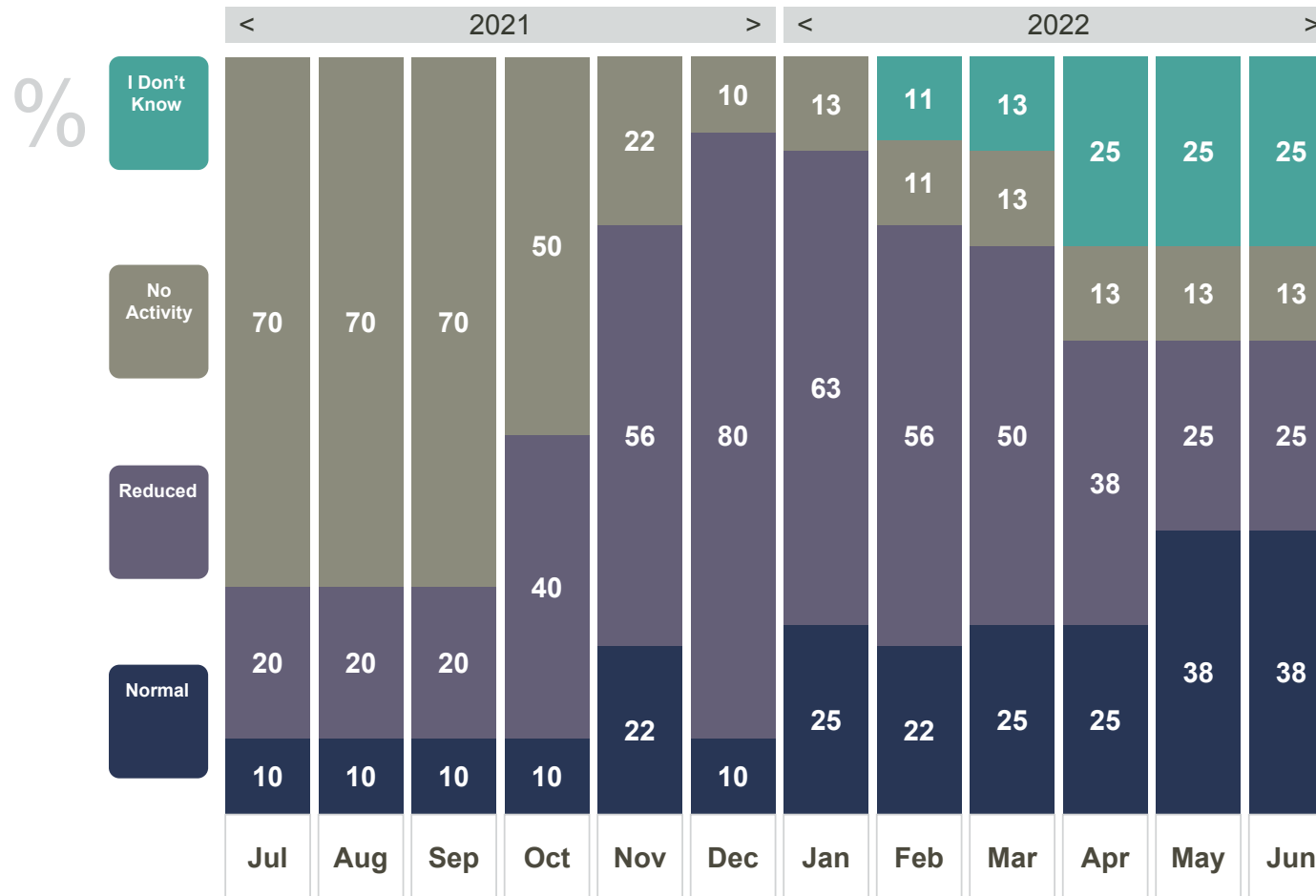
## Climate Change and Net Zero Carbon Events

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



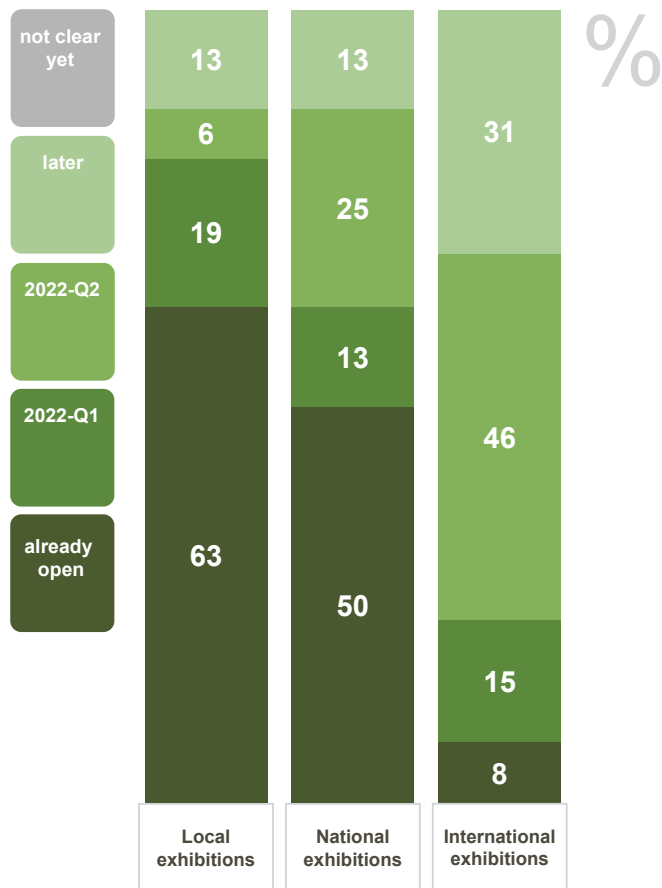


## Situation of the industry operations in the 2<sup>nd</sup> half of 2021 and current predictions for the 1<sup>st</sup> half of 2022

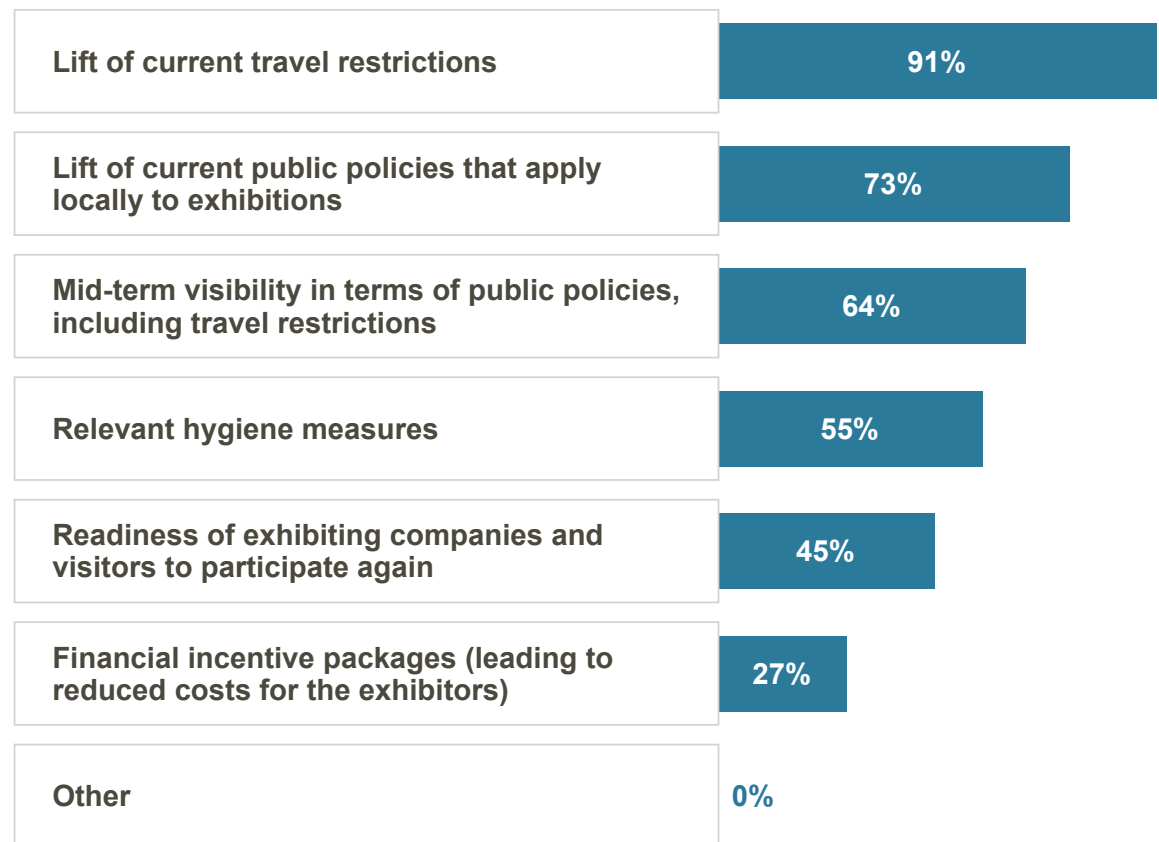


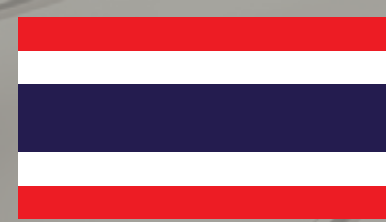


## When do you believe exhibitions will open again in your city?

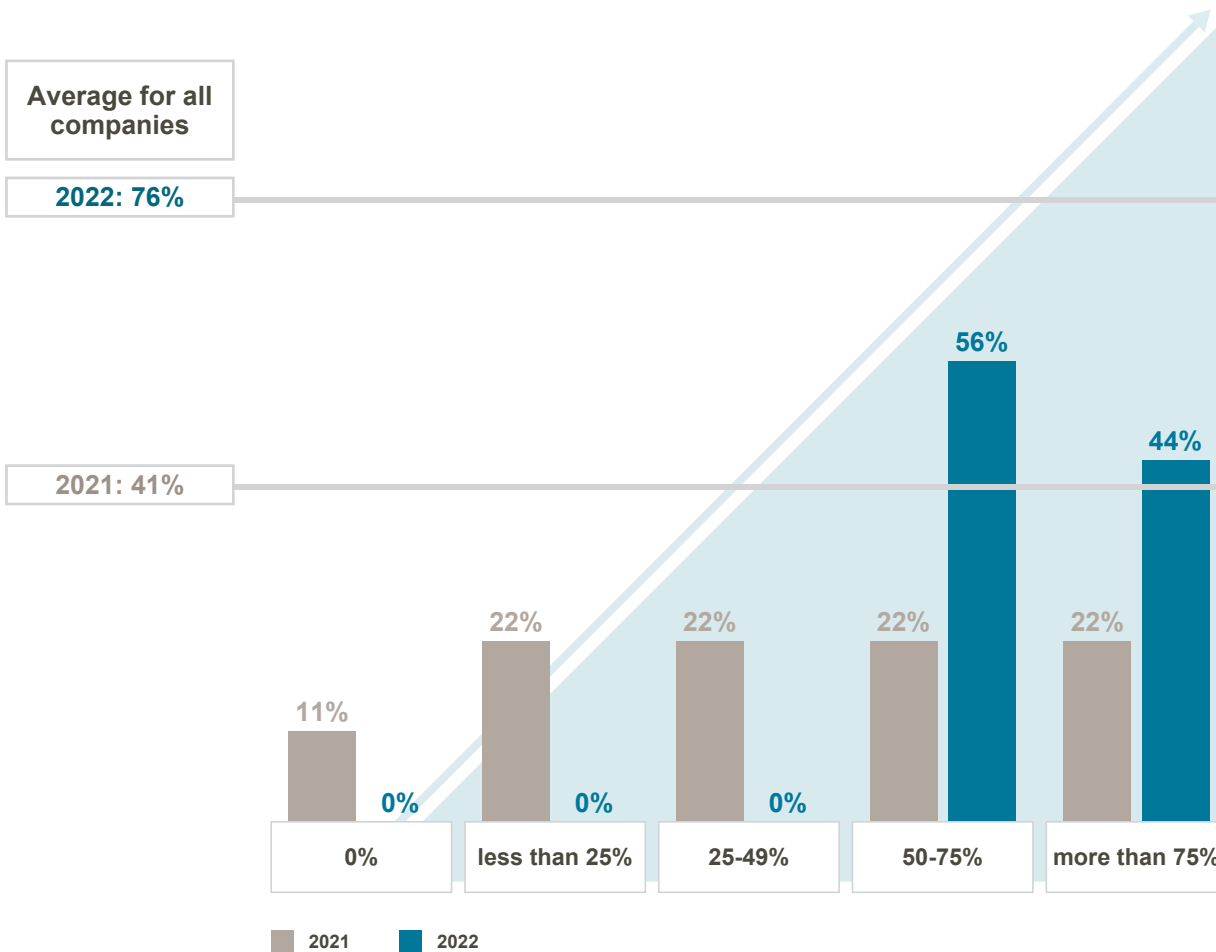


## What do you believe would most help the “bounce back” of exhibitions?

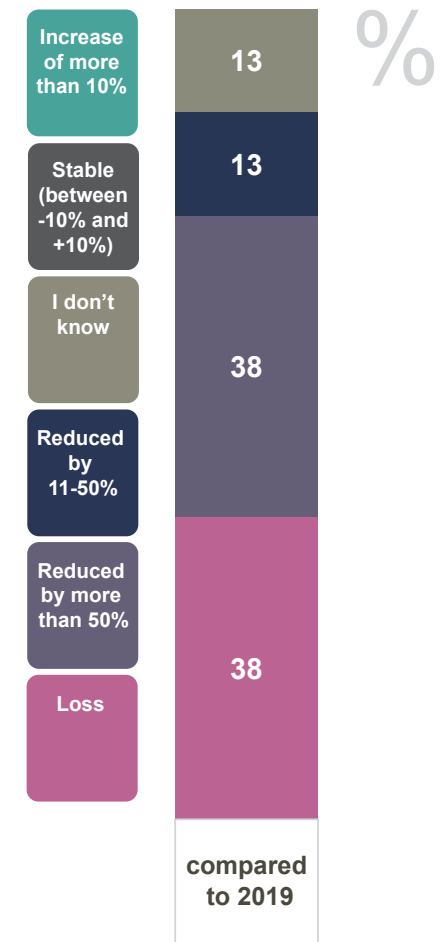




## Revenue compared to 2019



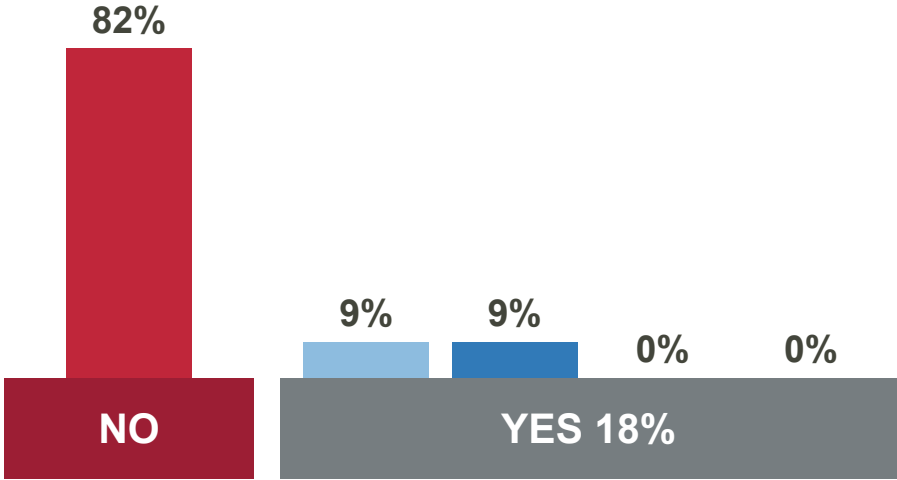
## Operating Profits 2021





## Did your company benefit from public financial support?

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

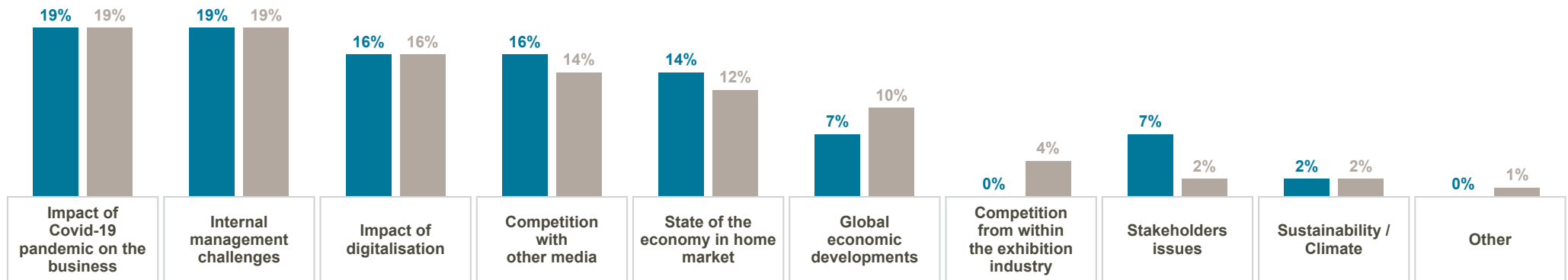




## Most important business issues in the exhibition industry

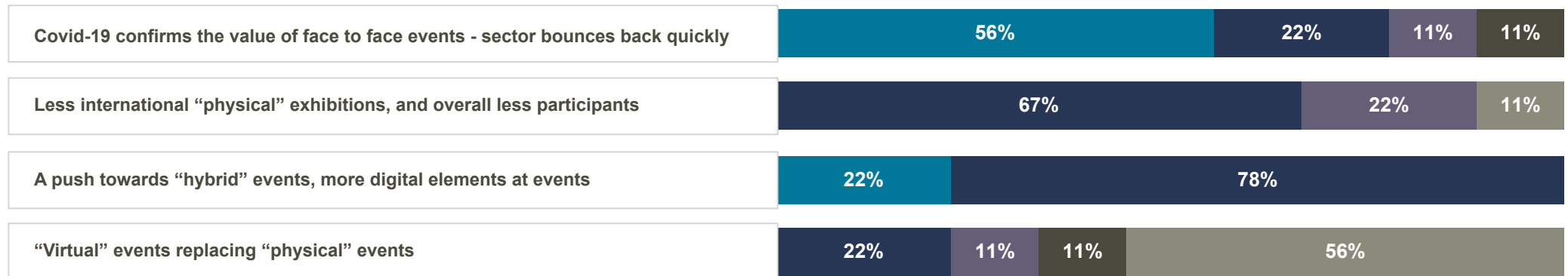
Thailand

Global



## Format of exhibitions in the coming years

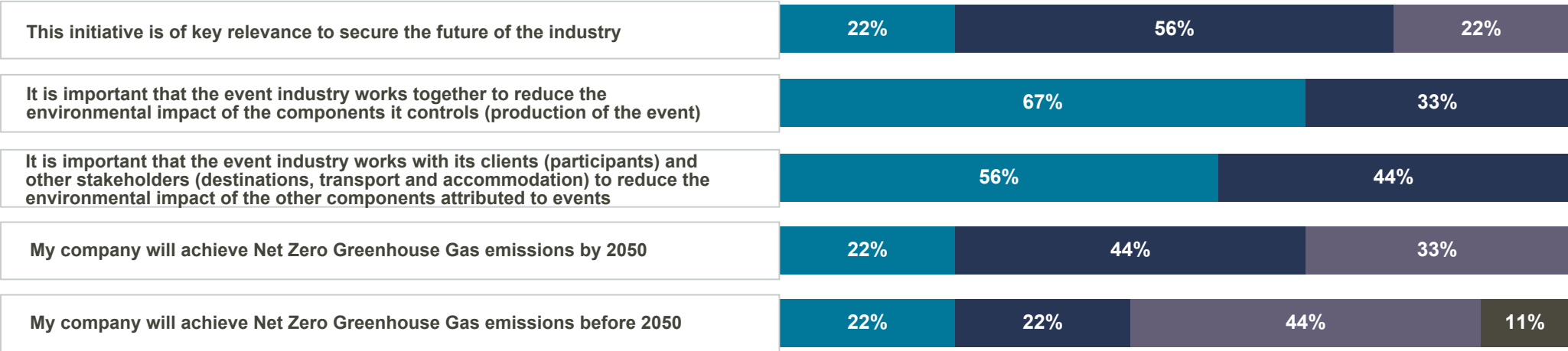
■ Yes, for sure 
 ■ Most probably 
 ■ Not sure 
 ■ Not sure at all 
 ■ Definitely not





## Climate Change and Net Zero Carbon Events

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





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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

# Appendix: Number of survey replies per country

## Total = 401 (in 53 countries/regions)

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

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