UFI Research: An Overview

Global Reports

Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

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


Regional Reports

Regular market overviews on UFI’s chapter regions.

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

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

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

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

Topical Reports

Focused reports on challenges and developments within the exhibition industry.

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

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

Best Practices Compendiums – Case studies of successful industry developments.

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

UFI Research Patron: Freeman

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

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

## Introduction

## Results globally

- Operations – Reopening Exhibitions
- Turnover – Operating profits
- Public Financial Support – Workforce – Perspectives
- Most Important Business Issues
- Digitisation
- Format of Exhibitions in the Coming Years
- Physical, hybrid and digital events

## Regional and details results for selected markets

- North America – Mexico and US
- Central & South America – Brazil, Chile and Colombia
- Europe – France, Germany, Italy, Russian Federation, Spain, Turkey and UK
- Middle East & Africa – South Africa et UAE
- Asia & Pacific – Australia, China, Hong Kong, India, Japan, Malaysia, Singapore, South Korea and Thailand

## Conclusion

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

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

With a record number of 474 participating companies, the reach of this barometer is unprecedented. It enables us to share specific, vastly expanded insights into 23 markets and 5 regions. This is the result of global collaboration, and we wish to thank all the following associations who take part in the project: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFE (Spanish Trade Fairs Association) in Spain, AFEP (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, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs) in Russia, SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, TEA (Thai Exhibition Association) in Thailand, UBRAFE (União Brasileira dos Promotores Feiras) in Brazil and UNIMEV (French Meeting Industry Council) in France.

Important remarks

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

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

This research is available online at www.ufi.org/research
Operations - Reopening Exhibitions

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

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

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

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

Regional results indicate that the Middle East & Africa and Central & South America regions are likely to be more affected than others with a monthly average throughout 2020 of respectively 40% and 34% of “no activity” (31% in Europe, 25% in North America and 23% in Asia & Pacific) and 22% and 20% of “normal activity” (27% in Asia & Pacific, 30% in Europe and 35% in North America).

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

When asked what element would most help towards the “bounce-back” of exhibitions, the majority of companies rank “lifting of current travel restrictions” (71% of answers), “readiness of exhibiting companies and visitors to participate again” (58% of answers), and “lifting of current public policies that apply locally to exhibitions” (55% of answers) as the key drivers. These “top 3” elements apply to all regions, except Middle East & Africa, where “mid-term visibility in terms of public policies, including travel restrictions” ranks third (with 45%). North America and Central & South America rank “readiness of exhibiting companies and visitors to participate again” as the most important of these three elements.
Reported levels of exhibition industry operations throughout 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don’t Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>53</td>
<td>49</td>
<td>44</td>
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<tr>
<td>Feb</td>
<td>49</td>
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<td>Mar</td>
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<td>Apr</td>
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<tr>
<td>May</td>
<td>32</td>
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</tr>
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<td>Jun</td>
<td>6</td>
<td>26</td>
<td>41</td>
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<tr>
<td>Jul</td>
<td>9</td>
<td>9</td>
<td>42</td>
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</tr>
<tr>
<td>Aug</td>
<td>9</td>
<td>10</td>
<td>43</td>
<td>49</td>
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<tr>
<td>Sep</td>
<td>9</td>
<td>6</td>
<td>40</td>
<td>47</td>
</tr>
<tr>
<td>Oct</td>
<td>9</td>
<td>6</td>
<td>36</td>
<td>49</td>
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<tr>
<td>Nov</td>
<td>9</td>
<td>6</td>
<td>32</td>
<td>49</td>
</tr>
<tr>
<td>Dec</td>
<td>12</td>
<td>9</td>
<td>36</td>
<td>47</td>
</tr>
</tbody>
</table>
When do you believe exhibitions will open again in your city?

- **not clear yet**: 5% (Local), 6% (National), 5% (International)
- **later**: 26% (Local), 34% (National), 50% (International)
- **2022-H1**: 38% (Local), 43% (National), 24% (International)
- **already open**: 29% (Local), 16% (National), 9% (International)

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

- **Lift of current travel restrictions**: 71%
- **Readiness of exhibiting companies and visitors to participate again**: 58%
- **Lift of current public policies that apply locally to exhibitions**: 55%
- **Mid-term visibility in terms of public policies, including travel restrictions**: 45%
- **Financial incentive packages (leading to reduced costs for the exhibitors)**: 40%
- **Relevant hygiene measures**: 31%
- **Other**: 9%
The 27th Barometer surveyed the participants’ expectations for their company’s 2021 gross turnover, when compared to 2019. The survey also questioned the evolution of operating profits for 2020 compared to the previous year.

The following charts present:

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

- the evolution of operating profits for 2020 and those for 2019 (taken from the previous Barometer).

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

Regional results indicate that:

- The revenue drop anticipated for 2021 is highest in the Middle East & Africa and Central & South America (respectively only 35% and 37% of 2019 revenues), followed by Europe (48%), Asia & Pacific (50%) and North America (55%).

- In terms of profits, the percentage of companies who have seen a loss for 2020 is 41% for North America, 44% for the Asia & Pacific, 51% for the Middle East & Africa, 55% in Europe, and 59% for Central & South America.
Revenue compared to 2019

- **Average for all companies**
  - 2020: 28%
  - 2021: 48%

Operating Profits

- **Increase of more than 10%**
  - 2019: 45%
  - 2020: 43%

- **Stable (between -10% and +10%)**
  - 2019: 11%
  - 2020: 14%

- **Reduced by 11-50%**
  - 2019: 36%
  - 2020: 36%

- **Reduced by more than 50%**
  - 2019: 51%
  - 2020: 51%

- **Loss**
  - 2019: 3%
  - 2020: 4%

- **I don’t know**
  - 2019: 6%
  - 2020: 5%
Public Financial Support – Workforce – Perspectives

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>52%</td>
</tr>
<tr>
<td>Yes, for less than 10% of our 2019 overall costs</td>
<td>26%</td>
</tr>
<tr>
<td>Yes, for between 10% and 25% of our 2019 overall costs</td>
<td>14%</td>
</tr>
<tr>
<td>Yes, for between 25% and 50% of our 2019 overall costs</td>
<td>5%</td>
</tr>
<tr>
<td>Yes, for more than 50% of our 2019 overall costs</td>
<td>3%</td>
</tr>
</tbody>
</table>

Have you had to reduce your workforce?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>43%</td>
</tr>
<tr>
<td>Yes, for less than 10% of our 2019 overall costs</td>
<td>18%</td>
</tr>
<tr>
<td>Yes, for between 10% and 25% of our 2019 overall costs</td>
<td>9%</td>
</tr>
<tr>
<td>Yes, for between 25% and 50% of our 2019 overall costs</td>
<td>16%</td>
</tr>
<tr>
<td>Yes, for more than 50% of our 2019 overall costs</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>34%</td>
</tr>
<tr>
<td>Yes, thanks to savings</td>
<td>13%</td>
</tr>
<tr>
<td>No, thanks to governmental support/ short time work allowance</td>
<td>21%</td>
</tr>
<tr>
<td>Yes, up to 10%</td>
<td>9%</td>
</tr>
<tr>
<td>Yes, up to 25%</td>
<td>16%</td>
</tr>
<tr>
<td>Yes, up to 50%</td>
<td>14%</td>
</tr>
<tr>
<td>Yes, up to 75%</td>
<td>5%</td>
</tr>
<tr>
<td>Yes, we shut down to the minimum</td>
<td>12%</td>
</tr>
<tr>
<td>It’s okay, we have extended our offering to other profitable work areas</td>
<td>57%</td>
</tr>
<tr>
<td>It’s okay, we’ll survive from our savings</td>
<td>10%</td>
</tr>
<tr>
<td>It will be hard, but we can keep our heads above water</td>
<td>26%</td>
</tr>
<tr>
<td>I’m afraid we’d have to close down</td>
<td>14%</td>
</tr>
</tbody>
</table>

27th UFI Global Exhibition Barometer / July 2021 ©
Most Important Business Issues

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

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

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

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

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

Results from current survey - June 2021
Results from previous survey - Dec 2020

- Impact of Covid-19 pandemic on the business: 29% (current), 29% (previous)
- State of the economy in home market: 19% (current), 19% (previous)
- Global economic developments: 15% (current), 16% (previous)
- Impact of digitisation: 10% (current), 11% (previous)
- Internal management challenges: 9% (current), 7% (previous)
- Competition from within the exhibition industry: 5% (current), 4% (previous)
- Competition with other media: 5% (current), 7% (previous)
- Regulatory / Stakeholders issues: 5% (current), 5% (previous)
- Other: 2% (current), 1% (previous)

Responding to customer digitalization needs: 38% (current), 58% (previous), 16% (current)
New Digital Products / Hybrid events: 58% (current), 38% (previous), 16% (current)
Internal Process: 16% (current)
Finance: 49% (current), 38% (previous), 61% (current)
Human Resources: 38% (current)
Business Model Adjustments: 61% (current)
Other: 3% (current)
Virtual Trade Show: 46% (current), 25% (previous), 19% (current), 6% (previous)
Internet: 25% (current)
Social Media: 19% (current)
Other: 6% (current)
Health & safety: 67% (current), 49% (previous), 6% (current)
Sustainability: 49% (current), 6% (previous)
Other: 6% (current)

(multiple answers possible)
Most important issues: detail by region and type of activity for the five top issues identified globally

**Organiser**

- Impact of Covid-19 pandemic on the business: 29, 28, 29%
- State of the economy in home market: 20, 19, 8%
- Global economic developments: 15, 13, 8%
- Impact of digitisation: 11, 5, 10%
- Internal management challenges: 14, 18, 9%

**Venue only**

- Impact of Covid-19 pandemic on the business: 20, 19, 8%
- State of the economy in home market: 15, 13, 8%
- Global economic developments: 11, 5, 10%
- Impact of digitisation: 9, 14, 8%
- Internal management challenges: 16, 5, 7%

**Service provider only**

- Impact of Covid-19 pandemic on the business: 4, 2, 4%
- State of the economy in home market: 4, 2, 4%
- Global economic developments: 4, 2, 4%
- Impact of digitisation: 3, 10, 3%
- Internal management challenges: 10, 4, 3%
Digitisation

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

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

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

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

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

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

Actions put in place

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage): 58%
- Developed a digital / transformation strategy for individual exhibitions / products: 40%
- Changed internal processes and workflows in our company into digital processes: 37%
- Launched digital products not directly related to existing exhibitions: 25%
- Developed a digital / transformation strategy for the whole company: 22%
- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.): 10%
- Other: 6%
## Actions put in place

<table>
<thead>
<tr>
<th>Action</th>
<th>North America</th>
<th>Central &amp; South America</th>
<th>Europe</th>
<th>Middle East &amp; Africa</th>
<th>Asia &amp; Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions</td>
<td>46%</td>
<td>49%</td>
<td>58%</td>
<td>55%</td>
<td>67%</td>
</tr>
<tr>
<td>(like apps, digital advertising, and digital signage)</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual</td>
<td>57%</td>
<td>44%</td>
<td>38%</td>
<td>34%</td>
<td>35%</td>
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<tr>
<td>exhibitions / products</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital</td>
<td>54%</td>
<td>31%</td>
<td>38%</td>
<td>45%</td>
<td>33%</td>
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<tr>
<td>processes</td>
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<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>32%</td>
<td>31%</td>
<td>24%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>22%</td>
<td>19%</td>
<td>25%</td>
<td>11%</td>
<td>23%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management</td>
<td>8%</td>
<td>1%</td>
<td>15%</td>
<td>5%</td>
<td>12%</td>
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<tr>
<td>(like a CDO, Head of Digital, etc.)</td>
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</tbody>
</table>

### Organiser, Venue only, Service provider only

<table>
<thead>
<tr>
<th>Action</th>
<th>North America</th>
<th>Central &amp; South America</th>
<th>Europe</th>
<th>Middle East &amp; Africa</th>
<th>Asia &amp; Pacific</th>
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<tr>
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<td>47%</td>
<td>24%</td>
<td>18%</td>
<td>23%</td>
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<tr>
<td>(like apps, digital advertising, and digital signage)</td>
<td></td>
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</tr>
<tr>
<td>Developed a digital / transformation strategy for individual</td>
<td>47%</td>
<td>37%</td>
<td>25%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>exhibitions / products</td>
<td></td>
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</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital</td>
<td>45%</td>
<td>24%</td>
<td>20%</td>
<td>24%</td>
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<td>processes</td>
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</tr>
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<td>Developed a digital / transformation strategy for the whole company</td>
<td>34%</td>
<td>18%</td>
<td>12%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management</td>
<td>34%</td>
<td>18%</td>
<td>12%</td>
<td>4%</td>
<td>7%</td>
</tr>
</tbody>
</table>
The 27th Barometer focussed on possible driving trends for the format of exhibitions in the coming years, by asking companies to assess four different statements. As the same question was in the two previous editions of this research, the comparisons allow to identify trends.

**Global results indicate that:**

- 78% of companies (up from 64% six months ago and 57% 12 months ago) of respondents are confident that “COVID-19 confirms the value of face-to-face events” anticipating that the sector will bounce back quickly (39% “Yes, for sure” and 39% “Most probably”), while 20% are “Not sure”.

- 46% - compared to 63% 6 months ago and 57% 12 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants” (6% “Yes, for sure” and 39% “Most probably”), and 44% are “Not sure”.

- 6% of companies – 80% 6 months ago and 82% 12 months ago - consider that there is “A push towards hybrid events, more digital elements at events” (26% “Yes, for sure” and 50% “Most probably”).

- 11% - down from 14% 6 months ago and 17% 12 months ago - agrees with the statement that “Virtual events replacing physical events” (3% “Yes, for sure” and 8% “Most probably”), 36% are “Not sure” and 53% are stating “definitely not”.

The results show no significant differences across regions.
## Format of exhibitions in the coming years

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid-19 confirms the value of face to face events - sector bounces back quickly</td>
<td>39%</td>
<td>39%</td>
<td>18%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Less international “physical” exhibitions, and overall less participants</td>
<td>6%</td>
<td>39%</td>
<td>32%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>A push towards “hybrid” events, more digital elements at events</td>
<td>26%</td>
<td>50%</td>
<td>13%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>“Virtual” events replacing “physical” events</td>
<td>3%</td>
<td>8%</td>
<td>18%</td>
<td>19%</td>
<td>53%</td>
</tr>
</tbody>
</table>
Physical, hybrid and digital events

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

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

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

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

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

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

Number of fairs projected in 2021

- Digital: 50%
- Physical: 30%
- Hybrid: 20%

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

- Physical:
  - Less than 10%: 6%
  - Between 10% and 30%: 10%
  - Between 30% and 50%: 6%
  - More than 50%: 37%

- Digital:
  - Less than 10%: 0%
  - Between 10% and 30%: 6%
  - Between 30% and 50%: 6%
  - More than 50%: 21%

Expanded activities (for venues only)

- 56%: Streaming of digital events (broadcast studio)
- 35%: Vaccination centre
- 26%: Sports and / entertainment events stage
- 20%: Site to generate brand activations
- 20%: Hospital

27th UFI Global Exhibition Barometer / July 2021 ©
### Part 2: Detailed results for 5 regions and 23 markets

<table>
<thead>
<tr>
<th>Region</th>
<th>Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America:</td>
<td>Mexico</td>
</tr>
<tr>
<td></td>
<td>US</td>
</tr>
<tr>
<td>Central &amp; South America:</td>
<td>Brazil</td>
</tr>
<tr>
<td></td>
<td>Chile</td>
</tr>
<tr>
<td></td>
<td>Colombia</td>
</tr>
<tr>
<td>Europe:</td>
<td>France</td>
</tr>
<tr>
<td></td>
<td>Germany</td>
</tr>
<tr>
<td></td>
<td>Italy</td>
</tr>
<tr>
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<td>Russian Federation</td>
</tr>
<tr>
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<td>Spain</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
</tr>
<tr>
<td></td>
<td>United Kingdom</td>
</tr>
<tr>
<td>Middle East &amp; Africa:</td>
<td>UAE</td>
</tr>
<tr>
<td></td>
<td>South Africa</td>
</tr>
<tr>
<td>Asia &amp; Pacific:</td>
<td>Australia</td>
</tr>
<tr>
<td></td>
<td>China</td>
</tr>
<tr>
<td></td>
<td>Hong Kong</td>
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<td></td>
<td>Singapore</td>
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<tr>
<td></td>
<td>South Korea</td>
</tr>
<tr>
<td></td>
<td>Thailand</td>
</tr>
</tbody>
</table>
North America
Situation of industry operations in 2021

North America

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don’t Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>64</td>
<td>50</td>
<td>46</td>
<td>25</td>
</tr>
<tr>
<td>Feb</td>
<td>64</td>
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<td>46</td>
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</tr>
<tr>
<td>Mar</td>
<td>64</td>
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<tr>
<td>Apr</td>
<td>64</td>
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<td>25</td>
</tr>
<tr>
<td>May</td>
<td>64</td>
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</tr>
<tr>
<td>Jun</td>
<td>64</td>
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<tr>
<td>Jul</td>
<td>64</td>
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<td>Aug</td>
<td>64</td>
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<td>Sep</td>
<td>64</td>
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<td>Oct</td>
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<td>Nov</td>
<td>64</td>
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</tr>
<tr>
<td>Dec</td>
<td>64</td>
<td>50</td>
<td>46</td>
<td>25</td>
</tr>
</tbody>
</table>

World

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don’t Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>53</td>
<td>49</td>
<td>44</td>
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</tr>
<tr>
<td>Feb</td>
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<td>Mar</td>
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<td>Apr</td>
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<tr>
<td>Dec</td>
<td>53</td>
<td>49</td>
<td>44</td>
<td>32</td>
</tr>
</tbody>
</table>

27th UFI Global Exhibition Barometer / July 2021 ©
When do you believe exhibitions will open again in your city?

**North America**

- Not clear yet: 27%
- Later: 34%
- 2022-H1: 57%
- 2021-H2: 19%
- Already open: 29%

**World**

- Not clear yet: 5%
- Later: 34%
- 2022-H1: 50%
- 2021-H2: 29%
- Already open: 16%
What do you believe would most help the “bounce back” of exhibitions?

**North America**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>69%</td>
</tr>
<tr>
<td>Lift of current travel restrictions</td>
<td>62%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>57%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>38%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>38%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
</tr>
</tbody>
</table>

**World**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>71%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>58%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>40%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Revenue compared to 2019
North America

<table>
<thead>
<tr>
<th>Range</th>
<th>North America</th>
<th>World</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>2021</td>
<td>52%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Average for all companies:
- North America: 2020: 36%, 2021: 52%
- World: 2020: 28%, 2021: 48%
Operating Profits
North America

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>I don’t know</td>
<td>45</td>
<td>51</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Loss</td>
<td>2</td>
<td>10</td>
</tr>
</tbody>
</table>

North America

<table>
<thead>
<tr>
<th>Year</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>35</td>
<td>15</td>
</tr>
<tr>
<td>2020</td>
<td>11</td>
<td>5</td>
</tr>
</tbody>
</table>

World

<table>
<thead>
<tr>
<th>Year</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>2020</td>
<td>8</td>
<td>5</td>
</tr>
</tbody>
</table>
Did your company benefit from public financial support?

**North America**
- No: 64%
- Yes, for less than 10% of our 2019 overall costs: 18%
- Yes, for between 10% and 25% of our 2019 overall costs: 5%
- Yes, for between 25% and 50% of our 2019 overall costs: 0%
- Yes, for more than 50% of our 2019 overall costs: 3%

**World**
- No: 52%
- Yes, for less than 10% of our 2019 overall costs: 26%
- Yes, for between 10% and 25% of our 2019 overall costs: 15%
- Yes, for between 25% and 50% of our 2019 overall costs: 14%
- Yes, for more than 50% of our 2019 overall costs: 3%
Have you had to reduce your workforce?

North America
- No, thanks to savings: 22%
- No, thanks to governmental support/short time work allowance: 26%
- Yes, up to 10%: 15%
- Yes, up to 25%: 18%
- Yes, up to 50%: 12%
- Yes, up to 75%: 12%
- Yes, we shut down to the minimum: 12%

World
- No, thanks to savings: 24%
- No, thanks to governmental support/short time work allowance: 24%
- Yes, up to 10%: 16%
- Yes, up to 25%: 12%
- Yes, up to 50%: 14%
- Yes, up to 75%: 2%
- Yes, we shut down to the minimum: 5%

North America: 37% (YES)
- Yes, up to 10%: 12%
- Yes, up to 25%: 9%
- Yes, up to 50%: 12%
- Yes, up to 75%: 12%
- Yes, we shut down to the minimum: 12%

World: 43% (YES)
- Yes, up to 10%: 12%
- Yes, up to 25%: 12%
- Yes, up to 50%: 12%
- Yes, up to 75%: 12%
- Yes, we shut down to the minimum: 12%
If there is no business for the next 6 months, which best applies?

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

North America | World
---|---
WE'LL MANAGE
North America 34% World 34%
WE'RE STRUGGLING
North America 66% World 66%
Most Important Business Issues - Format of Exhibitions - North America

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>North America</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly
  - Yes, for sure: 35%
  - Most probably: 53%
  - Not sure: 10%
  - Not sure at all: 3%
  - Definitely not: 3%

- Less international “physical” exhibitions, and overall less participants
  - Yes, for sure: 3%
  - Most probably: 49%
  - Not sure: 34%
  - Not sure at all: 14%

- A push towards “hybrid” events, more digital elements at events
  - Yes, for sure: 26%
  - Most probably: 45%
  - Not sure: 13%
  - Not sure at all: 11%
  - Definitely not: 5%

- “Virtual” events replacing “physical” events
  - Yes, for sure: 3%
  - Most probably: 8%
  - Not sure: 28%
  - Not sure at all: 62%
### Digitisation: implementation in North America and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>North America</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions/products</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>54%</td>
<td>40%</td>
</tr>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>46%</td>
<td>37%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>32%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Number of fairs projected in 2021
North America

- **North America**
  - 34% Digital
  - 52% Physical
  - 14% Hybrid

- **World**
  - 30% Digital
  - 50% Physical
  - 20% Hybrid
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

North America

Physical

<table>
<thead>
<tr>
<th></th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 10%</td>
<td>3%</td>
<td>10%</td>
<td>0%</td>
<td>38%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
<td>0%</td>
<td>15%</td>
<td>28%</td>
<td></td>
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<tr>
<td>Between 30% and 50%</td>
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<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>More than 50%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
<td></td>
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</tbody>
</table>

Digital

<table>
<thead>
<tr>
<th></th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 10%</td>
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</tr>
<tr>
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<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>More than 50%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
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</tbody>
</table>

World

Physical

<table>
<thead>
<tr>
<th></th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Less than 10%</td>
<td>6%</td>
<td>10%</td>
<td>6%</td>
<td>37%</td>
</tr>
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<td>Between 10% and 30%</td>
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<tr>
<td>Between 30% and 50%</td>
<td>0%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>More than 50%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Digital

<table>
<thead>
<tr>
<th></th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 10%</td>
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<td>6%</td>
<td>37%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
<td>0%</td>
<td>6%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
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<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>More than 50%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>
Expanded activities (for venues only) North America

North America

- Streaming of digital events (broadcast studio): 75%
- Vaccination centre: 25%
- Sports and / entertainment events stage: 25%
- Site to generate brand activations: 0%
- Hospital: 0%

World

- Streaming of digital events (broadcast studio): 56%
- Vaccination centre: 49%
- Sports and / entertainment events stage: 35%
- Site to generate brand activations: 26%
- Hospital: 22%
Detailed results for Mexico

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>67</td>
<td>56</td>
<td>28</td>
<td>6</td>
</tr>
<tr>
<td>Feb</td>
<td>56</td>
<td>39</td>
<td>39</td>
<td>6</td>
</tr>
<tr>
<td>Mar</td>
<td>39</td>
<td>50</td>
<td>50</td>
<td>6</td>
</tr>
<tr>
<td>Apr</td>
<td>50</td>
<td>58</td>
<td>58</td>
<td>6</td>
</tr>
<tr>
<td>May</td>
<td>26</td>
<td>63</td>
<td>63</td>
<td>6</td>
</tr>
<tr>
<td>Jun</td>
<td>21</td>
<td>56</td>
<td>56</td>
<td>6</td>
</tr>
<tr>
<td>Jul</td>
<td>17</td>
<td>53</td>
<td>53</td>
<td>6</td>
</tr>
<tr>
<td>Aug</td>
<td>6</td>
<td>29</td>
<td>29</td>
<td>6</td>
</tr>
<tr>
<td>Sep</td>
<td>6</td>
<td>41</td>
<td>41</td>
<td>6</td>
</tr>
<tr>
<td>Oct</td>
<td>6</td>
<td>59</td>
<td>59</td>
<td>6</td>
</tr>
<tr>
<td>Nov</td>
<td>6</td>
<td>72</td>
<td>72</td>
<td>6</td>
</tr>
<tr>
<td>Dec</td>
<td>6</td>
<td>44</td>
<td>44</td>
<td>6</td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for Mexico

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>already open</td>
<td>48</td>
<td>29</td>
<td>6</td>
</tr>
<tr>
<td>2021-H2</td>
<td>35</td>
<td>43</td>
<td>52</td>
</tr>
<tr>
<td>2022-H1</td>
<td>17</td>
<td>29</td>
<td>6</td>
</tr>
<tr>
<td>not clear yet</td>
<td>6</td>
<td>29</td>
<td>6</td>
</tr>
</tbody>
</table>

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

- Readiness of exhibiting companies and visitors to participate again: 67%
- Lift of current public policies that apply locally to exhibitions: 57%
- Lift of current travel restrictions: 52%
- Financial incentive packages (leading to reduced costs for the exhibitors): 38%
- Mid-term visibility in terms of public policies, including travel restrictions: 33%
- Relevant hygiene measures: 33%
- Other: 10%

(21 answers in total)
Detailed results for Mexico

Revenue compared to 2019

Average for all companies

- 2021: 53%
- 2020: 33%

Operating Profits

- Increase of more than 10%
- Stable (between -10% and +10%)
- I don’t know
- Reduced by 11-50%
- Reduced by more than 50%
- Loss

2019
- 5
- 19
- 25
- 65

2020
- 5
- 5
- 33
- 6

(21 answers in total)
Detailed results for Mexico

Did your company benefit from public financial support?

- No: 90%
- Yes, for less than 10% of our 2019 overall costs: 10%
- Yes, for between 10% and 25% of our 2019 overall costs: 0%
- Yes, for between 25% and 50% of our 2019 overall costs: 0%
- Yes, for more than 50% of our 2019 overall costs: 0%
- Yes, up to 10%: 15%
- Yes, up to 25%: 10%
- Yes, up to 50%: 10%
- Yes, up to 75%: 0%
- Yes, we shut down to the minimum: 10%

Have you had to reduce your workforce?

- No: 0%
- Yes: 100%

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

- No business: 0%
- Yes: 30%
- Yes, thanks to savings: 5%
- Yes, thanks to governmental support/short time work allowance: 0%
- Yes, up to 10%: 15%
- Yes, up to 25%: 10%
- Yes, up to 50%: 25%
- Yes, up to 75%: 20%
- Yes, we shut down to the minimum: 0%

- It's okay, we have extended our offering to other profitable work areas: 35%
- It's okay, we'll survive from our savings: 0%
- It will be hard, but we can keep our heads above water: 60%
- I'm afraid we'd have to close down: 5%

(21 answers in total)
### Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>Mexico (%)</th>
<th>Global (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>7%</td>
<td>16%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Format of exhibitions in the coming years

<table>
<thead>
<tr>
<th>Format of exhibitions in the coming years</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid-19 confirms the value of face to face events - sector bounces back quickly</td>
<td>26%</td>
<td>63%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less international “physical” exhibitions, and overall less participants</td>
<td>47%</td>
<td>40%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A push towards “hybrid” events, more digital elements at events</td>
<td>33%</td>
<td>56%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Virtual” events replacing “physical” events</td>
<td>11%</td>
<td>32%</td>
<td>58%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(21 answers in total)
## Digitisation: implementation in Mexico and globally

<table>
<thead>
<tr>
<th>Description</th>
<th>Mexico</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>52%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>43%</td>
<td>40%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Other</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Detailed results for Mexico

Number of fairs projected in 2021

- Physical: 38%
- Hybrid: 13%
- Digital: 49%

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

**Physical**
- Less than 10%: 5%
- Between 10% and 30%: 16%
- Between 30% and 50%: 0%
- More than 50%: 32%

**Digital**
- Less than 10%: 0%
- Between 10% and 30%: 0%
- Between 30% and 50%: 26%
- More than 50%: 16%
Detailed results for US

Situation of industry operations in 2021

Jan: 19
Feb: 20
Mar: 20
Apr: 20
May: 20
Jun: 40
Jul: 47
Aug: 79
Sep: 81
Oct: 71
Nov: 88
Dec: 13

(18 answers in total)
Detailed results for US

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>31</td>
<td>33</td>
<td>60</td>
</tr>
<tr>
<td>later</td>
<td>2</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>2021-H2</td>
<td>33</td>
<td>48</td>
<td>26</td>
</tr>
<tr>
<td>already open</td>
<td>33</td>
<td>15</td>
<td>6</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 78%
- Readiness of exhibiting companies and visitors to participate again: 78%
- Lift of current public policies that apply locally to exhibitions: 56%
- Mid-term visibility in terms of public policies, including travel restrictions: 39%
- Financial incentive packages (leading to reduced costs for the exhibitors): 33%
- Relevant hygiene measures: 22%
- Other: 22%

(18 answers in total)
Revenue compared to 2019

Average for all companies

- 2021: 50%
- 2020: 39%

- 0%: 7% (2020), 0% (2021)
- less than 25%: 27% (2020), 7% (2021)
- 25-49%: 29% (2020), 40% (2021)
- 50-75%: 7% (2020), 43% (2021)
- more than 75%: 20% (2020), 21% (2021)

Operating Profits

- Increase of more than 10%: 6 (2019), 28 (2020)
- Stable (between -10% and +10%): 71 (2019), 6 (2020)
- I don’t know: 6 (2019), 6 (2020)
- Reduced by 11-50%: 39 (2019)
- Reduced by more than 50%: 24 (2019)

(18 answers in total)
Detailed results for US

Did your company benefit from public financial support?

- No: 31%
- Yes, for less than 10% of our 2019 overall costs: 25%
- Yes, for between 10% and 25% of our 2019 overall costs: 0%
- Yes, for between 25% and 50% of our 2019 overall costs: 0%
- Yes, for more than 50% of our 2019 overall costs: 44%
- Yes, thanks to savings: 44%
- Yes, thanks to governmental support/ short time work allowance: 11%
- Yes, up to 10%: 17%
- Yes, up to 25%: 17%
- Yes, up to 50%: 6%
- Yes, up to 75%: 6%
- Yes, we shut down to the minimum: 17%

Have you had to reduce your workforce?

- No: 28%
- Yes, for less than 10% of our 2019 overall costs: 11%
- Yes, for between 10% and 25% of our 2019 overall costs: 17%
- Yes, for between 25% and 50% of our 2019 overall costs: 17%
- Yes, for more than 50% of our 2019 overall costs: 17%
- No, thanks to savings: 11%
- Yes, up to 10%: 6%
- Yes, up to 25%: 6%
- Yes, up to 50%: 6%
- Yes, up to 75%: 6%
- Yes, we shut down to the minimum: 17%
- No, thanks to governmental support/ short time work allowance: 17%
- Yes, up to 10%: 17%
- Yes, up to 25%: 17%
- Yes, up to 50%: 17%
- Yes, up to 75%: 17%
- Yes, we shut down to the minimum: 17%

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

- We'll manage: 33%
- We're struggling: 67%
- It's okay, we have extended our offering to other profitable work areas: 17%
- It's okay, we'll survive from our savings: 17%
- It will be hard, but we can keep our heads above water: 17%
- I'm afraid we'd have to close down: 17%
Detailed results for US

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>USA</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly
  - Yes, for sure: 44%
  - Most probably: 39%
  - Not sure at all: 11%
  - Not sure: 6%
  - Definitely not: Unknown

- Less international “physical” exhibitions, and overall less participants
  - Yes, for sure: 6%
  - Most probably: 53%
  - Not sure at all: 24%
  - Not sure: 18%

- A push towards “hybrid” events, more digital elements at events
  - Yes, for sure: 24%
  - Most probably: 35%
  - Not sure at all: 6%
  - Not sure: 24%
  - Definitely not: 12%

- “Virtual” events replacing “physical” events
  - Yes, for sure: 6%
  - Most probably: 29%
  - Not sure at all: 65%
  - Not sure: Unknown
  - Definitely not: Unknown

(18 answers in total)
Detailed results for US

Digitisation: implementation in USA and globally

<table>
<thead>
<tr>
<th>Change</th>
<th>USA</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>37%</td>
<td>44%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Other

(18 answers in total)
Detailed results for US

Number of fairs projected in 2021

- Digital: 16%
- Physical: 60%
- Hybrid: 24%

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

- Less than 10%
  - Physical: 0%
  - Digital: 0%

- Between 10% and 30%
  - Physical: 0%
  - Digital: 6%

- Between 30% and 50%
  - Physical: 6%
  - Digital: 0%

- More than 50%
  - Physical: 44%
  - Digital: 39%
Central & South America
Situation of industry operations in 2021

Central & South America

- January: 9
- February: 11
- March: 12
- April: 13
- May: 14
- June: 17
- July: 21
- August: 31
- September: 36
- October: 38
- November: 42
- December: 32

World

- January: 12
- February: 13
- March: 16
- April: 17
- May: 19
- June: 22
- July: 27
- August: 31
- September: 44
- October: 36
- November: 47
- December: 58
When do you believe exhibitions will open again in your city?

Central & South America
- Not clear yet: 2/7/3
- Later: 26/40/56
- 2022-H1: 47/24/4
- 2021-H2: 17/3/3

World
- Not clear yet: 1/5/15
- Later: 26/38/50
- 2022-H1: 34/24/24
- 2021-H2: 16/9/24
What do you believe would most help the “bounce back” of exhibitions?

### Central & South America

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>63%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>62%</td>
</tr>
<tr>
<td>Lift of current travel restrictions</td>
<td>51%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>45%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>41%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>34%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
</tbody>
</table>

### World

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>71%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>58%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>40%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Revenue compared to 2019
Central & South America

World

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>less than 25%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>25-49%</td>
<td>26%</td>
<td>38%</td>
</tr>
<tr>
<td>50-75%</td>
<td>8%</td>
<td>27%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Average for all companies

Central & South America

2021: 32%
2020: 23%

Average for all companies

World

2021: 48%
2020: 28%
Operating Profits
Central & South America

<table>
<thead>
<tr>
<th></th>
<th>Central &amp; South America</th>
<th>World</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2019</td>
<td>2020</td>
</tr>
<tr>
<td>Increase of more than 10%</td>
<td>40</td>
<td>3</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>37</td>
<td>59</td>
</tr>
<tr>
<td>I don’t know</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>Loss</td>
<td>6</td>
<td>51</td>
</tr>
</tbody>
</table>

%
Did your company benefit from public financial support?

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

Central & South America: 92%
World: 52%

YES
- Central & South America: 8%
- World: 48%

NO
- Central & South America: 26%
- World: 14%

Central & South America: 92%
World: 52%
Have you had to reduce your workforce?

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

For **Central & South America**:
- NO: 16%
- YES: 84%

For **World**:
- NO: 26%
- YES: 74%

Central & South America: 21% World: 43%

Central & South America: 79% World: 57%
If there is no business for the next 6 months, which best applies?

- Central & South America
- World

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

Central & South America: 23%
World: 34%

Central & South America: WE’LL MANAGE 10%, WE'RE STRUGGLING 57%
World: WE’LL MANAGE 10%, WE'RE STRUGGLING 66%
Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 26% Central & South America, 29% Global
- State of the economy in home market: 26% Central & South America, 19% Global
- Global economic developments: 9% Central & South America, 16% Global
- Impact of digitisation: 7% Central & South America, 11% Global
- Internal management challenges: 11% Central & South America, 7% Global
- Competition from within the exhibition industry: 6% Central & South America, 4% Global
- Competition with other media: 7% Central & South America, 7% Global
- Regulatory / Stakeholders issues: 5% Central & South America, 5% Global
- Other: 2% Central & South America, 1% Global

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly:
  - Yes, for sure: 28%
  - Most probably: 31%
  - Not sure: 32%
  - Not sure at all: 4%
  - Definitely not: 4%

- Less international “physical” exhibitions, and overall less participants:
  - Yes, for sure: 13%
  - Most probably: 38%
  - Not sure: 37%
  - Not sure at all: 13%

- A push towards “hybrid” events, more digital elements at events:
  - Yes, for sure: 37%
  - Most probably: 49%
  - Not sure: 12%
  - Not sure at all: 1%

- “Virtual” events replacing “physical” events:
  - Yes, for sure: 11%
  - Most probably: 17%
  - Not sure: 21%
  - Not sure at all: 10%
  - Definitely not: 42%
# Digitisation: implementation in Central and South America and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Central &amp; South America</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>49%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>31%</td>
<td>37%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>1%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Number of fairs projected in 2021
Central & South America

Central & South America

World

- Digital
- Physical
- Hybrid

- 29%
- 31%
- 40%

- 30%
- 20%
- 50%
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

Central & South America

<table>
<thead>
<tr>
<th></th>
<th>Physical</th>
<th>Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Between 30% and 50%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>More than 50%</td>
<td>22%</td>
<td>14%</td>
</tr>
</tbody>
</table>

World

<table>
<thead>
<tr>
<th></th>
<th>Physical</th>
<th>Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10%</td>
<td>6%</td>
<td>0%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Between 30% and 50%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>More than 50%</td>
<td>37%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Expanded activities (for venues only)
Central & South America

- Streaming of digital events (broadcast studio): 63%
- Vaccination centre: 21%
- Sports and entertainment events stage: 32%
- Site to generate brand activations: 26%
- Hospital: 21%

World

- Streaming of digital events (broadcast studio): 56%
- Vaccination centre: 49%
- Sports and entertainment events stage: 35%
- Site to generate brand activations: 26%
- Hospital: 22%
Detailed results for Brazil

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>38</td>
<td>50</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Feb</td>
<td>44</td>
<td>44</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Mar</td>
<td>44</td>
<td>44</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Apr</td>
<td>38</td>
<td>44</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>May</td>
<td>38</td>
<td>44</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Jun</td>
<td>43</td>
<td>43</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Jul</td>
<td>43</td>
<td>43</td>
<td>54</td>
<td>54</td>
</tr>
<tr>
<td>Aug</td>
<td>7</td>
<td>38</td>
<td>31</td>
<td>31</td>
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<tr>
<td>Sep</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Oct</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Nov</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Dec</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Brazil

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>4</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>later</td>
<td>31</td>
<td>42</td>
<td>55</td>
</tr>
<tr>
<td>2022-H1</td>
<td>50</td>
<td>50</td>
<td>23</td>
</tr>
<tr>
<td>2021-H2</td>
<td>12</td>
<td>50</td>
<td>5</td>
</tr>
<tr>
<td>already open</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- Readiness of exhibiting companies and visitors to participate again: 65%
- Lift of current public policies that apply locally to exhibitions: 59%
- Mid-term visibility in terms of public policies, including travel restrictions: 59%
- Relevant hygiene measures: 47%
- Financial incentive packages (leading to reduced costs for the exhibitors): 29%
- Lift of current travel restrictions: 24%
- Other: 12%

(17 answers in total)
Detailed results for Brazil

Revenue compared to 2019

Average for all companies
- 2021: 39%
- 2020: 23%

Operating Profits

- Increase of more than 10%
- Stable (between -10% and +10%)
- I don’t know
- Reduced by 11-50%
- Reduced by more than 50%
- Loss

2019
- 18
- 12
- 12
- 59

2020
- 36
- 43
- 59

(17 answers in total)
**Did your company benefit from public financial support?**

- 100% No
- 0% Yes

**Have you had to reduce your workforce?**

- 67% No
- 33% Yes

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

- 81% We’re struggling
- 13% We’ll manage
- 6% It’s okay, we have extended our offering to other profitable work areas
- 0% It’s okay, we’ll survive from our savings
- 0% It will be hard, but we can keep our heads above water
- 0% I’m afraid we’d have to close down

(17 answers in total)
Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: Brazil 29%, Global 29%
- State of the economy in home market: Brazil 24%, Global 19%
- Global economic developments: Brazil 17%, Global 16%
- Impact of digitisation: Brazil 5%, Global 11%
- Internal management challenges: Brazil 12%, Global 7%
- Competition from within the exhibition industry: Brazil 0%, Global 4%
- Competition with other media: Brazil 7%, Global 7%
- Regulatory / Stakeholders issues: Brazil 5%, Global 5%
- Other: Brazil 2%, Global 1%

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: Yes, for sure 19%, Most probably 50%, Not sure 31%
- Less international “physical” exhibitions, and overall less participants: Yes, for sure 38%, Most probably 46%, Not sure 15%
- A push towards “hybrid” events, more digital elements at events: Yes, for sure 38%, Most probably 44%, Not sure 19%
- “Virtual” events replacing “physical” events: Yes, for sure 6%, Most probably 19%, Not sure 6%, Definitely not 69%
Detailed results for Brazil

Digitisation: implementation in Brazil and globally

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage) - Brazil: 18%, Global: 58%
- Developed a digital / transformation strategy for individual exhibitions / products - Brazil: 6%, Global: 40%
- Changed internal processes and workflows in our company into digital processes - Brazil: 6%, Global: 37%
- Launched digital products not directly related to existing exhibitions - Brazil: 6%, Global: 25%
- Developed a digital / transformation strategy for the whole company - Brazil: 6%, Global: 22%
- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.) - Brazil: 0%, Global: 10%
- Other - Brazil: 6%
Detailed results for Brazil

Number of fairs projected in 2021

- Digital: 24%
- Physical: 49%
- Hybrid: 26%

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

<table>
<thead>
<tr>
<th>Physical Income Contribution</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
<td>0%</td>
<td>0%</td>
<td>25%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digital Income Contribution</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>19%</td>
<td>13%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Chile

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>54%</td>
<td>8%</td>
<td>31%</td>
<td>15%</td>
</tr>
<tr>
<td>Feb</td>
<td>58%</td>
<td>3%</td>
<td>33%</td>
<td>15%</td>
</tr>
<tr>
<td>Mar</td>
<td>46%</td>
<td>3%</td>
<td>29%</td>
<td>23%</td>
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<tr>
<td>Apr</td>
<td>50%</td>
<td>3%</td>
<td>23%</td>
<td>21%</td>
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<tr>
<td>May</td>
<td>54%</td>
<td>3%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Jun</td>
<td>42%</td>
<td>3%</td>
<td>22%</td>
<td>12%</td>
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<tr>
<td>Jul</td>
<td>22%</td>
<td>3%</td>
<td>10%</td>
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<tr>
<td>Aug</td>
<td>22%</td>
<td>3%</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Sep</td>
<td>30%</td>
<td>3%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Oct</td>
<td>30%</td>
<td>3%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Nov</td>
<td>20%</td>
<td>3%</td>
<td>44%</td>
<td>22%</td>
</tr>
<tr>
<td>Dec</td>
<td>22%</td>
<td>3%</td>
<td>33%</td>
<td>15%</td>
</tr>
</tbody>
</table>

(16 answers in total)
Detailed results for Chile

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>14</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>later</td>
<td>32</td>
<td>47</td>
<td>22</td>
</tr>
<tr>
<td>2021-H2</td>
<td>43</td>
<td>37</td>
<td>52</td>
</tr>
<tr>
<td>already open</td>
<td>11</td>
<td>3</td>
<td>17</td>
</tr>
</tbody>
</table>

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

- Lift of current public policies that apply locally to exhibitions: 69%
- Lift of current travel restrictions: 63%
- Financial incentive packages (leading to reduced costs for the exhibitors): 63%
- Mid-term visibility in terms of public policies, including travel restrictions: 56%
- Readiness of exhibiting companies and visitors to participate again: 44%
- Relevant hygiene measures: 25%
- Other: 13%

(16 answers in total)
Detailed results for Chile

Revenue compared to 2019

- Average for all companies: 28%
- 2021: 28%

- 0%: 9%
- less than 25%: 27%
- 25-49%: 27%
- 50-75%: 36%
- more than 75%: 0%

Operating Profits

- 2019: 7
- 2020: 71

- Increase of more than 10%
- Stable (between -10% and +10%)
- I don’t know
- Reduced by 11-50%
- Reduced by more than 50%
- Loss

(16 answers in total)
Detailed results for Chile

Did your company benefit from public financial support?

- Yes: 13%
- No: 87%

Have you had to reduce your workforce?

- No: 18%
- Yes: 82%

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

- We'll manage: 19%
- We're struggling: 81%

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

No, thanks to savings
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

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

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

(16 answers in total)
Detailed results for Chile

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

- **Impact of Covid-19 pandemic on the business**: 24% Chile, 29% Global
- **State of the economy in home market**: 29% Chile, 19% Global
- **Global economic developments**: 16% Chile, 11% Global
- **Impact of digitisation**: 3% Chile, 11% Global
- **Internal management challenges**: 8% Chile, 7% Global
- **Competition from within the exhibition industry**: 5% Chile, 4% Global
- **Competition with other media**: 8% Chile, 7% Global
- **Regulatory / Stakeholders issues**: 8% Chile, 5% Global
- **Other**: 5% Chile, 1% Global

**Format of exhibitions in the coming years**

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**
  - Yes, for sure: 21%
  - Most probably: 36%
  - Not sure: 29%
  - Not sure at all: 7%
  - Definitely not: 7%

- **Less international “physical” exhibitions, and overall less participants**
  - Yes, for sure: 31%
  - Most probably: 23%
  - Not sure: 31%
  - Not sure at all: 15%

- **A push towards “hybrid” events, more digital elements at events**
  - Yes, for sure: 36%
  - Most probably: 50%
  - Not sure: 7%
  - Not sure at all: 7%

- **“Virtual” events replacing “physical” events**
  - Yes, for sure: 14%
  - Most probably: 21%
  - Not sure: 29%
  - Not sure at all: 7%
  - Definitely not: 29%
Digitisation: implementation in Chile and globally

<table>
<thead>
<tr>
<th>Category</th>
<th>Chile</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>40%</td>
<td>56%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>37%</td>
<td>50%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(16 answers in total)
Detailed results for Chile

Number of fairs projected in 2021

- Digital: 59%
- Physical: 24%
- Hybrid: 17%

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

- Physical:
  - Less than 10%: 15%
  - Between 10% and 30%: 8%
  - Between 30% and 50%: 0%
  - More than 50%: 8%

- Digital:
  - Less than 10%: 8%
  - Between 10% and 30%: 0%
  - Between 30% and 50%: 15%
  - More than 50%: 23%

(16 answers in total)
Detailed results for Colombia

Situation of industry operations in 2021

- **I Don't Know**: 65 January, 53 February, 47 March, 42 April, 58 May, 33 June, 11 July, 11 August, 11 September, 12 October, 12 November, 12 December

- **No Activity**: 30 January, 32 February, 42 March, 47 April, 32 May, 44 June, 17 July, 12 August, 11 September, 11 October, 12 November, 12 December

- **Reduced**: 11 January, 11 February, 16 March, 11 April, 22 May, 22 June, 24 July, 39 August, 39 September, 44 October, 41 November, 29 December

(21 answers in total)
Detailed results for Colombia

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>3</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>later</td>
<td>20</td>
<td>39</td>
<td>52</td>
</tr>
<tr>
<td>2022-H1</td>
<td>54</td>
<td>50</td>
<td>31</td>
</tr>
<tr>
<td>already open</td>
<td>20</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

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

- Readiness of exhibiting companies and visitors to participate again: 71%
- Financial incentive packages (leading to reduced costs for the exhibitors): 71%
- Lift of current travel restrictions: 52%
- Lift of current public policies that apply locally to exhibitions: 52%
- Mid-term visibility in terms of public policies, including travel restrictions: 33%
- Relevant hygiene measures: 29%
- Other: 14%

(21 answers in total)
Detailed results for Colombia

Revenue compared to 2019

- **Average for all companies**
  - **2021:** 33%
  - **2020:** 25%

- **2020**:
  - 6% (0%)
  - 6% (less than 25%)
  - 11% (25-49%)
  - 12% (50-75%)
  - 12% (more than 75%)

- **2021**:
  - 6% (0%)
  - 6% (less than 25%)
  - 50% (25-49%)
  - 28% (50-75%)
  - 6% (more than 75%)

Operating Profits

- **Increase of more than 10%**
  - 10

- **Stable (between -10% and +10%)**
  - 5

- **I don’t know**
  - 62

- **Reduced by 11-50%**
  - 20

- **Reduced by more than 50%**
  - 65

- **Loss**
  - 31

- **2019**
  - 8

- **2020**
  - 21 answers in total
Detailed results for Colombia

Did your company benefit from public financial support?

- **No**: 91%
- **Yes, for less than 10% of our 2019 overall costs**: 0%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 0%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 0%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **Yes, thanks to savings**: 9%
- **Yes, thanks to governmental support/short time work allowance**: 0%
- **Yes, up to 10%**: 5%
- **Yes, up to 25%**: 5%
- **Yes, up to 50%**: 0%
- **Yes, up to 75%**: 15%
- **Yes, we shut down to the minimum**: 0%

Have you had to reduce your workforce?

- **No**: 5%
- **Yes, for less than 10% of our 2019 overall costs**: 0%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 0%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 10%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **No, thanks to savings**: 5%
- **No, thanks to governmental support/short time work allowance**: 5%
- **Yes, up to 10%**: 15%
- **Yes, up to 25%**: 0%
- **Yes, up to 50%**: 10%
- **Yes, up to 75%**: 10%
- **Yes, we shut down to the minimum**: 55%

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

- **We'll manage**: 30%
- **We're struggling**: 70%
- **It's okay, we have extended our offering to other profitable work areas**: 5%
- **It's okay, we'll survive from our savings**: 25%
- **It will be hard, but we can keep our heads above water**: 55%
- **I'm afraid we'd have to close down**: 15%

(21 answers in total)
Detailed results for Colombia

Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 21% Colombia, 23% Global
- State of the economy in home market: 29% Colombia, 19% Global
- Global economic developments: 8% Colombia, 16% Global
- Impact of digitisation: 15% Colombia, 11% Global
- Internal management challenges: 9% Colombia, 7% Global
- Competition from within the exhibition industry: 11% Colombia, 4% Global
- Competition with other media: 9% Colombia, 7% Global
- Regulatory/Stakeholders issues: 2% Colombia, 5% Global
- Other: 2% Colombia, 1% Global

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: 42% Yes, for sure, 26% Most probably, 26% Not sure, 5% Not sure at all
- Less international “physical” exhibitions, and overall less participants: 13% Yes, for sure, 40% Most probably, 33% Not sure, 13% Not sure at all
- A push towards “hybrid” events, more digital elements at events: 50% Yes, for sure, 33% Most probably, 17% Not sure
- “Virtual” events replacing “physical” events: 17% Yes, for sure, 17% Most probably, 11% Not sure
Digitisation: implementation in Colombia and globally

- Developed a digital / transformation strategy for individual exhibitions / products: 33% in Colombia, 58% globally.
- Launched digital products not directly related to existing exhibitions: 33% in Colombia, 40% globally.
- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage): 14% in Colombia, 37% globally.
- Changed internal processes and workflows in our company into digital processes: 14% in Colombia, 25% globally.
- Developed a digital / transformation strategy for the whole company: 10% in Colombia, 22% globally.
- Other: 5% in Colombia, 10% globally.
- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.): 0% in Colombia, 6% globally.

(21 answers in total)
Detailed results for Colombia

Number of fairs projected in 2021

- 32% Physical
- 26% Hybrid
- 42% Digital

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

- **Physical**
  - Less than 10%: 0%
  - Between 10% and 30%: 21%
  - Between 30% and 50%: 5%
  - More than 50%: 37%

- **Digital**
  - Less than 10%: 0%
  - Between 10% and 30%: 11%
  - Between 30% and 50%: 0%
  - More than 50%: 0%

(21 answers in total)
Europe
### Situation of Industry Operations in 2021

#### Europe

<table>
<thead>
<tr>
<th>Month</th>
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<th>Reduced</th>
<th>Normal</th>
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<td>Dec</td>
<td>10</td>
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</table>

#### World

<table>
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<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
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</thead>
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<td>32</td>
<td>32</td>
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<tr>
<td>Feb</td>
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<td>Mar</td>
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<td>Nov</td>
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<tr>
<td>Dec</td>
<td>36</td>
<td>36</td>
<td>36</td>
<td>36</td>
</tr>
</tbody>
</table>
### When do you believe exhibitions will open again in your city?

<table>
<thead>
<tr>
<th>Europe</th>
<th>World</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local exhibitions</strong></td>
<td><strong>Local exhibitions</strong></td>
<td>32</td>
</tr>
<tr>
<td><strong>National exhibitions</strong></td>
<td><strong>National exhibitions</strong></td>
<td>18</td>
</tr>
<tr>
<td><strong>International exhibitions</strong></td>
<td><strong>International exhibitions</strong></td>
<td>32</td>
</tr>
<tr>
<td><strong>not clear yet</strong></td>
<td><strong>not clear yet</strong></td>
<td>27</td>
</tr>
<tr>
<td><strong>later</strong></td>
<td><strong>2021-H1</strong></td>
<td>4</td>
</tr>
<tr>
<td><strong>2021-H2</strong></td>
<td><strong>2022-H1</strong></td>
<td>4</td>
</tr>
<tr>
<td>already open</td>
<td>already open</td>
<td>4</td>
</tr>
</tbody>
</table>

**Europe**
- Local exhibitions: 32%
- National exhibitions: 18%
- International exhibitions: 32%

**World**
- Local exhibitions: 24%
- National exhibitions: 16%
- International exhibitions: 24%
### What do you believe would most help the “bounce back” of exhibitions?

**Europe**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>77%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>61%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>54%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>47%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>39%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>28%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

**World**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>71%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>58%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>40%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Revenue compared to 2019

Europe

World

Average for all companies

2020: 32%

2021: 45%

2020: 28%

2021: 48%
### Operating profits

#### Europe

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>2</td>
<td>4</td>
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<tr>
<td>Stable (between -10% and +10%)</td>
<td>4</td>
<td>5</td>
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<tr>
<td>I don’t know</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>36</td>
<td>24</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>Loss</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

#### World

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>I don’t know</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Loss</td>
<td>51</td>
<td>51</td>
</tr>
</tbody>
</table>
Did your company benefit from public financial support?

Europe

No

Yes, for less than 10% of our 2019 overall costs

Yes, for between 10% and 25% of our 2019 overall costs

Yes, for between 25% and 50% of our 2019 overall costs

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

World

No

Yes, for less than 10% of our 2019 overall costs

Yes, for between 10% and 25% of our 2019 overall costs

Yes, for between 25% and 50% of our 2019 overall costs

Yes, for more than 50% of our 2019 overall costs
Have you had to reduce your workforce?

Europe

- No, thanks to savings: 25%
- No, thanks to governmental support/short time work allowance: 26%
- Yes, up to 10%: 32%
- Yes, up to 25%: 18%
- Yes, up to 50%: 6%
- Yes, up to 75%: 9%
- Yes, we shut down to the minimum: 3%

World

- No, thanks to savings: 17%
- No, thanks to governmental support/short time work allowance: 16%
- Yes, up to 10%: 12%
- Yes, up to 25%: 14%
- Yes, up to 50%: 3%
- Yes, up to 75%: 5%
- Yes, we shut down to the minimum: 4%

Europe: 57% No, 43% Yes  
World: 43% No, 57% Yes
If there is no business for the next 6 months, which best applies?

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

Europe

- We'll manage: 36%
- We're struggling: 64%

World

- We'll manage: 34%
- We're struggling: 66%
Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 28% (Europe), 29% (Global)
- State of the economy in home market: 17% (Europe), 19% (Global)
- Global economic developments: 18% (Europe), 16% (Global)
- Impact of digitisation: 13% (Europe), 11% (Global)
- Internal management challenges: 9% (Europe), 7% (Global)
- Competition from within the exhibition industry: 5% (Europe), 4% (Global)
- Competition with other media: 4% (Europe), 7% (Global)
- Regulatory / Stakeholders issues: 4% (Europe), 5% (Global)
- Other: 2% (Europe), 1% (Global)

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: Yes, for sure 40%, Most probably 44%, Not sure at all 12%, Definitely not 3%
- Less international "physical" exhibitions, and overall less participants: Yes, for sure 6%, Most probably 45%, Not sure at all 40%, Definitely not 9%
- A push towards "hybrid" events, more digital elements at events: Yes, for sure 23%, Most probably 52%, Not sure at all 13%, Definitely not 7%
- "Virtual" events replacing "physical" events: Yes, for sure 3%, Most probably 14%, Not sure at all 25%, Definitely not 58%
# Digitisation: implementation in Europe and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Europe</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Number of fairs projected in 2021

Europe

- Digital: 15%
- Physical: 56%
- Hybrid: 29%

World

- Digital: 20%
- Physical: 50%
- Hybrid: 30%
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

<table>
<thead>
<tr>
<th>Region</th>
<th>Physical Income</th>
<th>Digital Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Less than 10%</td>
<td>Between 10% and 30%</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>World</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Physical Income</th>
<th>Digital Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Less than 10%</td>
<td>Between 10% and 30%</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>World</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Expanded activities (for venues only)

Europe

- Streaming of digital events (broadcast studio): 57%
- Vaccination centre: 54%
- Sports and entertainment events stage: 32%
- Site to generate brand activations: 24%
- Hospital: 24%

World

- Streaming of digital events (broadcast studio): 56%
- Vaccination centre: 49%
- Sports and entertainment events stage: 35%
- Site to generate brand activations: 26%
- Hospital: 22%
### Detailed results for France

#### Situation of industry operations in 2021

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<th>Month</th>
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<th>Reduced</th>
<th>Normal</th>
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<td>Dec</td>
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<td>16</td>
<td>16</td>
<td>68</td>
</tr>
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</table>

(21 answers in total)
Detailed results for France

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>6% 4%</td>
<td>5% 4%</td>
<td>15%</td>
</tr>
<tr>
<td>later</td>
<td>26% 31%</td>
<td>30% 44%</td>
<td>39%</td>
</tr>
<tr>
<td>2022-H1</td>
<td>30% 44%</td>
<td>29%</td>
<td>2%</td>
</tr>
<tr>
<td>2021-H2</td>
<td>34% 16%</td>
<td>7%</td>
<td>0%</td>
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<tr>
<td>already open</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 81%
- Lift of current public policies that apply locally to exhibitions: 67%
- Mid-term visibility in terms of public policies, including travel restrictions: 62%
- Financial incentive packages (leading to reduced costs for the exhibitors): 43%
- Readiness of exhibiting companies and visitors to participate again: 33%
- Relevant hygiene measures: 33%
- Other: 0%

(21 answers in total)
Detailed results for France

Revenue compared to 2019

<table>
<thead>
<tr>
<th>Category</th>
<th>2020 (%)</th>
<th>2021 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>0%</td>
<td>0%</td>
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<tr>
<td>less than 25%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>25-49%</td>
<td>36%</td>
<td>55%</td>
</tr>
<tr>
<td>50-75%</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Average for all companies:
- 2020: 29%
- 2021: 49%

Operating Profits

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>14</td>
<td>29</td>
</tr>
<tr>
<td>I don’t know</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>Loss</td>
<td>48</td>
<td></td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for France

Did your company benefit from public financial support?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>14%</td>
</tr>
<tr>
<td>Yes, for less than 10% of 2019 overall costs</td>
<td>10%</td>
</tr>
<tr>
<td>Yes, for between 10% and 25% of 2019 overall costs</td>
<td>48%</td>
</tr>
<tr>
<td>Yes, for between 25% and 50% of 2019 overall costs</td>
<td>29%</td>
</tr>
<tr>
<td>Yes, for more than 50% of 2019 overall costs</td>
<td>0%</td>
</tr>
</tbody>
</table>

Have you had to reduce your workforce?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, thanks to savings</td>
<td>62%</td>
</tr>
<tr>
<td>Yes, thanks to governmental support/ short time work allowance</td>
<td>14%</td>
</tr>
<tr>
<td>Yes, up to 10%</td>
<td>19%</td>
</tr>
<tr>
<td>Yes, up to 25%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, up to 50%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, up to 75%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, we shut down to the minimum</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's okay, we have extended our offering to other profitable work areas</td>
<td>19%</td>
</tr>
<tr>
<td>It's okay, we'll survive from our savings</td>
<td>48%</td>
</tr>
<tr>
<td>It will be hard, but we can keep our heads above water</td>
<td>19%</td>
</tr>
<tr>
<td>I'm afraid we'd have to close down</td>
<td>14%</td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for France

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>France</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Global economic developments</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: 53% Yes, for sure, 32% Most probably, 16% Not sure at all
- Less international “physical” exhibitions, and overall less participants: 6% Definitely not, 53% Not sure at all, 35% Not sure, 6% Most probably
- A push towards “hybrid” events, more digital elements at events: 20% Definitely not, 50% Not sure at all, 20% Not sure, 5% Most probably
- “Virtual” events replacing “physical” events: 11% Definitely not, 50% Not sure at all, 39% Not sure
### Detailed results for France

#### Digitisation: implementation in France and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>France %</th>
<th>Global %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions</td>
<td>48%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows into digital processes</td>
<td>29%</td>
<td>37%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO)</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for France

Number of fairs projected in 2021

- 28% Digital
- 10% Physical
- 62% Hybrid

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

- Physical
  - Less than 10%
  - Between 10% and 30%
  - Between 30% and 50%
  - More than 50%
  - (21 answers in total)

- Digital
  - Less than 10%
  - Between 10% and 30%
  - Between 30% and 50%
  - More than 50%
Detailed results for Germany

Situation of industry operations in 2021

- **I Don't Know**: 20 (Jan), 17 (Feb), 17 (Mar), 17 (Apr), 17 (May), 17 (Jun), 17 (Jul), 17 (Aug), 17 (Sep), 17 (Oct), 17 (Nov), 17 (Dec)

- **No Activity**: 60 (Jan), 55 (Feb), 58 (Mar), 42 (Apr), 42 (May), 42 (Jun), 26 (Jul), 17 (Aug), 17 (Sep), 17 (Oct), 17 (Nov), 17 (Dec)

- **Reduced Activity**: 20 (Jan), 25 (Feb), 21 (Mar), 37 (Apr), 37 (May), 37 (Jun), 53 (Jul), 56 (Aug), 56 (Sep), 56 (Oct), 56 (Nov), 50 (Dec)

- **Normal Activity**: 20 (Jan), 20 (Feb), 21 (Mar), 21 (Apr), 21 (May), 21 (Jun), 21 (Jul), 22 (Aug), 28 (Sep), 28 (Oct), 28 (Nov), 28 (Dec)

(20 answers in total)
Detailed results for Germany

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

- Not clear yet: Local exhibitions 6%, National exhibitions 6%, International exhibitions 11%
- Later: Local exhibitions 27%, National exhibitions 33%, International exhibitions 60%
- 2022-H1: Local exhibitions 48%, National exhibitions 58%, International exhibitions 29%
- 2021-H2: Local exhibitions 18%, National exhibitions 3%, International exhibitions 29%
- Already open: Local exhibitions 18%, National exhibitions 3%, International exhibitions 29%

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

- Lift of current travel restrictions: 95%
- Readiness of exhibiting companies and visitors to participate again: 74%
- Lift of current public policies that apply locally to exhibitions: 68%
- Mid-term visibility in terms of public policies, including travel restrictions: 37%
- Relevant hygiene measures: 37%
- Financial incentive packages (leading to reduced costs for the exhibitors): 16%
- Other: 11%

(20 answers in total)
Detailed results for Germany

Revenue compared to 2019

<table>
<thead>
<tr>
<th></th>
<th>2020: 45%</th>
<th>2021: 35%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>less than 25%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>25-49%</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>50-75%</td>
<td>44%</td>
<td>13%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>67%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Average for all companies

Operating Profits

- Increase of more than 10%: 11 (2019: 56, 2020: 11)
- Stable (between -10% and +10%): 11 (2019: 26, 2020: 26)
- Reduced by 11-50%: 31 (2019: 6, 2020: 6)
- Reduced by more than 50%: 56 (2019: 6, 2020: 6)
- Loss: 0 (2019: 0, 2020: 0)

(20 answers in total)
# Detailed results for Germany

### Did your company benefit from public financial support?

- **No**: 61%
- **Yes, for less than 10% of our 2019 overall costs**: 6%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 11%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 11%
- **Yes, for more than 50% of our 2019 overall costs**: 11%

### Have you had to reduce your workforce?

- **No**: 63%
- **Yes, up to 10%**: 37%
- **Yes, up to 25%**: 26%
- **Yes, up to 50%**: 21%
- **Yes, up to 75%**: 5%
- **Yes, we shut down to the minimum**: 5%

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

- **No**: 37%
- **Yes, up to 10%**: 21%
- **Yes, up to 25%**: 16%
- **Yes, we shut down to the minimum**: 5%
- **No, thanks to governmental support/ short time work allowance**: 5%
- **Yes, thanks to savings**: 5%
- **It’s okay, we’ll survive from our savings**: 5%
- **We’ll manage**: 58%
- **We’re struggling**: 42%

(20 answers in total)
Detailed results for Germany

Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 23% Germany, 29% Global
- State of the economy in home market: 11% Germany, 19% Global
- Global economic developments: 21% Germany, 16% Global
- Impact of digitisation: 18% Germany, 11% Global
- Internal management challenges: 9% Germany, 7% Global
- Competition from within the exhibition industry: 7% Germany, 4% Global
- Competition with other media: 5% Germany, 7% Global
- Regulatory / Stakeholders issues: 4% Germany, 5% Global
- Other: 2% Germany, 1% Global

Format of exhibitions in the coming years

1. Covid-19 confirms the value of face to face events - sector bounces back quickly
   - Yes, for sure: 58%
   - Most probably: 16%
   - Not sure: 11%
   - Not sure at all: 16%
2. Less international “physical” exhibitions, and overall less participants
   - Yes, for sure: 13%
   - Most probably: 44%
   - Not sure: 38%
   - Not sure at all: 6%
3. A push towards “hybrid” events, more digital elements at events
   - Yes, for sure: 28%
   - Most probably: 56%
   - Not sure: 11%
   - Not sure at all: 6%
4. “Virtual” events replacing “physical” events
   - Yes, for sure: 5%
   - Most probably: 11%
   - Not sure: 84%

(20 answers in total)
### Digitisation: implementation in Germany and globally

<table>
<thead>
<tr>
<th>Action</th>
<th>Germany</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>(like apps, digital advertising, and digital signage)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>exhibitions / products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>40%</td>
<td>37%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>processes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management</td>
<td>0%</td>
<td>6%</td>
</tr>
<tr>
<td>(like a CDO, Head of Digital, etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(20 answers in total)
Detailed results for Germany

Number of fairs projected in 2021

Digital: 44%
Physical: 28%
Hybrid: 28%

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

Physical
- Less than 10%: 0%
- Between 10% and 30%: 6%
- Between 30% and 50%: 6%
- More than 50%: 44%

Digital
- Less than 10%: 0%
- Between 10% and 30%: 6%
- Between 30% and 50%: 6%
- More than 50%: –
Detailed results for Italy

Situation of industry operations in 2021

- **I Don’t Know**
  - Jan: 55%
  - Feb: 65%
  - Mar: 65%
  - Apr: 55%
  - May: 50%
  - Jun: 10%
  - Jul: 6%
  - Aug: 33%
  - Sep: 39%
  - Oct: 33%
  - Nov: 35%
  - Dec: 35%

- **No Activity**
  - Jan: 5%
  - Feb: 30%
  - Mar: 30%
  - Apr: 40%
  - May: 45%
  - Jun: 85%
  - Jul: 83%
  - Aug: 50%
  - Sep: 61%
  - Oct: 67%
  - Nov: 65%
  - Dec: 65%

- **Reduced**
  - Jan: 5%
  - Feb: 5%
  - Mar: 5%
  - Apr: 5%
  - May: 5%
  - Jun: 11%
  - Jul: 17%
  - Aug: 17%
  - Sep: 39%
  - Oct: 33%
  - Nov: 35%
  - Dec: 35%

- **Normal**
  - Jan: 5%
  - Feb: 5%
  - Mar: 5%
  - Apr: 5%
  - May: 5%
  - Jun: 5%
  - Jul: 61%
  - Aug: 50%
  - Sep: 65%
  - Oct: 65%
  - Nov: 65%
  - Dec: 65%

(21 answers in total)
Detailed results for Italy

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>6</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>later</td>
<td>30</td>
<td>29</td>
<td>27</td>
</tr>
<tr>
<td>2022-H1</td>
<td>33</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>2021-H2</td>
<td>30</td>
<td>29</td>
<td>17</td>
</tr>
<tr>
<td>already open</td>
<td>30</td>
<td>29</td>
<td>17</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 68%
- Readiness of exhibiting companies and visitors to participate again: 53%
- Lift of current public policies that apply locally to exhibitions: 42%
- Mid-term visibility in terms of public policies, including travel restrictions: 37%
- Financial incentive packages (leading to reduced costs for the exhibitors): 26%
- Relevant hygiene measures: 21%
- Other: 16%

(21 answers in total)
Detailed results for Italy

Revenue compared to 2019

Operating Profits

2019: 63 2020: 44

- Increase of more than 10%
- Stable (between -10% and +10%)
- I don’t know
- Reduced by 11-50%
- Reduced by more than 50%
- Loss

2019:

- 6
- 11
- 28
- 38
- 44

2020:

- 6
- 11
- 28
- 38
- 44

(21 answers in total)
Did your company benefit from public financial support?

- **No**: 26%
- **Yes, for less than 10% of our 2019 overall costs**: 63%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 11%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 0%
- **Yes, for more than 50% of our 2019 overall costs**: 0%

Have you had to reduce your workforce?

- **No**: 26%
- **Yes, for less than 10% of our 2019 overall costs**: 53%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 11%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 5%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **Yes, we shut down to the minimum**: 5%

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

- **It's okay, we have extended our offering to other profitable work areas**: 79%
- **We'll manage**: 21%
- **We're struggling**: 0%
- **I'm afraid we'd have to close down**: 0%

(21 answers in total)
Detailed results for Italy

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Business Issue</th>
<th>Italy</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>24%</td>
<td>11%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>28%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

<table>
<thead>
<tr>
<th>Format of Exhibitions</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid-19 confirms the value of face to face events - sector bounces back quickly</td>
<td>28%</td>
<td>61%</td>
<td>6%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Less international “physical” exhibitions, and overall less participants</td>
<td>6%</td>
<td>24%</td>
<td>65%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>A push towards “hybrid” events, more digital elements at events</td>
<td>28%</td>
<td>44%</td>
<td>22%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>“Virtual” events replacing “physical” events</td>
<td>6%</td>
<td>22%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Digitisation: implementation in Italy and globally

<table>
<thead>
<tr>
<th>Change Description</th>
<th>Italy (%)</th>
<th>Global (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>38%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>24%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>19%</td>
<td>37%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for Italy

Number of fairs projected in 2021

- Digital: 13%
- Physical: 37%
- Hybrid: 50%

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

**Physical**
- Less than 10%: 56%
- Between 10% and 30%: 11%
- Between 30% and 50%: 6%
- More than 50%: 6%

**Digital**
- Less than 10%: 0%
- Between 10% and 30%: 0%
- Between 30% and 50%: 0%
- More than 50%: 0%

(21 answers in total)
Detailed results for Russian Federation

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>31</td>
<td>38</td>
<td>50</td>
<td>31</td>
</tr>
<tr>
<td>Feb</td>
<td>19</td>
<td>31</td>
<td>56</td>
<td>6</td>
</tr>
<tr>
<td>Mar</td>
<td>6</td>
<td>38</td>
<td>81</td>
<td>6</td>
</tr>
<tr>
<td>Apr</td>
<td>6</td>
<td>24</td>
<td>76</td>
<td>6</td>
</tr>
<tr>
<td>May</td>
<td>24</td>
<td>38</td>
<td>63</td>
<td>6</td>
</tr>
<tr>
<td>Jun</td>
<td>18</td>
<td>12</td>
<td>29</td>
<td>6</td>
</tr>
<tr>
<td>Jul</td>
<td>18</td>
<td>12</td>
<td>76</td>
<td>6</td>
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<tr>
<td>Aug</td>
<td>18</td>
<td>12</td>
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<td>6</td>
</tr>
<tr>
<td>Sep</td>
<td>12</td>
<td>12</td>
<td>65</td>
<td>6</td>
</tr>
<tr>
<td>Oct</td>
<td>12</td>
<td>12</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>Nov</td>
<td>12</td>
<td>12</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>Dec</td>
<td>18</td>
<td>12</td>
<td>12</td>
<td>6</td>
</tr>
</tbody>
</table>

(17 answers in total)
### Detailed results for Russian Federation

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>later</td>
<td>11</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>2022-H1</td>
<td>11</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>2021-H2</td>
<td>74</td>
<td>65</td>
<td>55</td>
</tr>
<tr>
<td>already open</td>
<td>65</td>
<td>55</td>
<td></td>
</tr>
</tbody>
</table>

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

- **Lift of current travel restrictions**: 100%
- **Readiness of exhibiting companies and visitors to participate again**: 71%
- **Mid-term visibility in terms of public policies, including travel restrictions**: 53%
- **Financial incentive packages (leading to reduced costs for the exhibitors)**: 41%
- **Relevant hygiene measures**: 35%
- **Lift of current public policies that apply locally to exhibitions**: 29%
- **Other**: 6%

(17 answers in total)
Detailed results for Russian Federation

Revenue compared to 2019

<table>
<thead>
<tr>
<th>Category</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average for all companies</td>
<td>37%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Operating Profits

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>6</td>
<td>25</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td>I don’t know</td>
<td>50</td>
<td>63</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Loss</td>
<td></td>
<td>19</td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Russian Federation

**Did your company benefit from public financial support?**

- **No**: 88%
- **Yes, for less than 10% of our 2019 overall costs**: 0%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 0%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 13%
- **Yes, for more than 50% of our 2019 overall costs**: 6%

**Have you had to reduce your workforce?**

- **No 65%**
- **Yes, up to 10%**: 29%
- **Yes, up to 25%**: 35%
- **Yes, up to 50%**: 12%
- **Yes, up to 75%**: 6%
- **Yes, we shut down to the minimum**: 0%

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

- **We’ll manage 6%**
- **We’re struggling 94%**

Breakdown of responses:
- **No**: 88%
- **Yes, thanks to savings**: 0%
- **Yes, thanks to governmental support/short time work allowance**: 13%
- **Yes, up to 10%**: 29%
- **Yes, up to 25%**: 35%
- **Yes, up to 50%**: 12%
- **Yes, up to 75%**: 6%
- **Yes, we shut down to the minimum**: 0%
- **It’s okay, we have extended our offering to other profitable work areas**: 6%
- **It’s okay, we’ll survive from our savings**: 0%
- **It will be hard, but we can keep our heads above water**: 94%
- **I’m afraid we’d have to close down**: 0%
Detailed results for Russian Federation

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

- Impact of Covid-19 pandemic on the business: 29% Russia, 29% Global
- State of the economy in home market: 19% Russia, 27% Global
- Global economic developments: 18% Russia, 16% Global
- Impact of digitisation: 11% Russia, 11% Global
- Internal management challenges: 0% Russia, 7% Global
- Competition from within the exhibition industry: 5% Russia, 4% Global
- Competition with other media: 2% Russia, 7% Global
- Regulatory / Stakeholders issues: 4% Russia, 5% Global
- Other: 4% Russia, 1% Global

**Format of exhibitions in the coming years**

- Covid-19 confirms the value of face to face events - sector bounces back quickly: 35% Yes, for sure, 53% Most probably, 6% Not sure at all, 6% Definitely not
- Less international “physical” exhibitions, and overall less participants: 13% Yes, for sure, 38% Most probably, 31% Not sure, 19% Not sure at all
- A push towards “hybrid” events, more digital elements at events: 41% Yes, for sure, 41% Most probably, 12% Not sure, 6% Definitely not
- “Virtual” events replacing “physical” events: 6% Yes, for sure, 13% Most probably, 81% Definitely not

(17 answers in total)
Detailed results for Russian Federation

Digitisation: implementation in Russian Federation and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Russian Federation</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>58%</td>
<td>76%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>40%</td>
<td>53%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>37%</td>
<td>47%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>25%</td>
<td>47%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>10%</td>
<td>29%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Russian Federation

Number of fairs projected in 2021

- Digital: 79%
- Physical: 21%

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

- Physical:
  - Less than 10%: 59%
  - Between 10% and 30%: 18%
  - Between 30% and 50%: 0%
  - More than 50%: 0%

- Digital:
  - Less than 10%: 0%
  - Between 10% and 30%: 6%
  - Between 30% and 50%: 6%
  - More than 50%: 0%
Detailed results for Spain

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>13</td>
<td>88</td>
<td>50</td>
<td>13</td>
</tr>
<tr>
<td>Feb</td>
<td>25</td>
<td>75</td>
<td>50</td>
<td>25</td>
</tr>
<tr>
<td>Mar</td>
<td>63</td>
<td>50</td>
<td>50</td>
<td>47</td>
</tr>
<tr>
<td>Apr</td>
<td>6</td>
<td>44</td>
<td>25</td>
<td>53</td>
</tr>
<tr>
<td>May</td>
<td>19</td>
<td>25</td>
<td>13</td>
<td>33</td>
</tr>
<tr>
<td>Jun</td>
<td>20</td>
<td>20</td>
<td>13</td>
<td>33</td>
</tr>
<tr>
<td>Jul</td>
<td>60</td>
<td>60</td>
<td>13</td>
<td>33</td>
</tr>
<tr>
<td>Aug</td>
<td>60</td>
<td>60</td>
<td>27</td>
<td>33</td>
</tr>
<tr>
<td>Sep</td>
<td>47</td>
<td>33</td>
<td>53</td>
<td>33</td>
</tr>
<tr>
<td>Oct</td>
<td>33</td>
<td>33</td>
<td>67</td>
<td>53</td>
</tr>
<tr>
<td>Nov</td>
<td>13</td>
<td>13</td>
<td>60</td>
<td>53</td>
</tr>
<tr>
<td>Dec</td>
<td>7</td>
<td>13</td>
<td>53</td>
<td>53</td>
</tr>
</tbody>
</table>

(16 answers in total)
Detailed results for Spain

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>8</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>later</td>
<td>33</td>
<td>38</td>
<td>40</td>
</tr>
<tr>
<td>2022-H1</td>
<td>31</td>
<td>38</td>
<td>20</td>
</tr>
<tr>
<td>2021-H2</td>
<td>28</td>
<td>16</td>
<td>24</td>
</tr>
<tr>
<td>already open</td>
<td>12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- Readiness of exhibiting companies and visitors to participate again: 75%
- Lift of current travel restrictions: 69%
- Lift of current public policies that apply locally to exhibitions: 63%
- Financial incentive packages (leading to reduced costs for the exhibitors): 63%
- Mid-term visibility in terms of public policies, including travel restrictions: 50%
- Relevant hygiene measures: 19%
- Other: 6%

(16 answers in total)
Detailed results for Spain

Revenue compared to 2019

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average for all companies</td>
<td>34%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Operating Profits

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>7</td>
<td>14</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>22</td>
<td>44</td>
</tr>
<tr>
<td>I don’t know</td>
<td>7</td>
<td>71</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loss</td>
<td>33</td>
<td></td>
</tr>
</tbody>
</table>
Did your company benefit from public financial support?

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

Have you had to reduce your workforce?

- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs
- Yes, thanks to savings
- Yes, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

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

- No business
- It's okay, we have extended our offering to other profitable work areas
- It's okay, we'll survive from our savings
- It will be hard, but we can keep our heads above water
- I'm afraid we'd have to close down

(16 answers in total)
Detailed results for Spain

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>Spain</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

<table>
<thead>
<tr>
<th>Format of exhibitions in the coming years</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid-19 confirms the value of face to face events - sector bounces back quickly</td>
<td>27%</td>
<td>60%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less international “physical” exhibitions, and overall less participants</td>
<td>63%</td>
<td>25%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A push towards “hybrid” events, more digital elements at events</td>
<td>7%</td>
<td>71%</td>
<td>7%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>“Virtual” events replacing “physical” events</td>
<td>36%</td>
<td>29%</td>
<td>36%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Digitisation: implementation in Spain and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Spain (%)</th>
<th>Global (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>69%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(16 answers in total)
Detailed results for Spain

Number of fairs projected in 2021

- 76% Physical
- 18% Digital
- 6% Hybrid

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

- Digital
  - Less than 10%
  - Between 10% and 30%
  - Between 30% and 50%
  - More than 50%

- Physical
  - Less than 10%
  - Between 10% and 30%
  - Between 30% and 50%
  - More than 50%

(16 answers in total)
Detailed results for Turkey

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>58%</td>
<td>45%</td>
<td>36%</td>
<td>17%</td>
</tr>
<tr>
<td>Feb</td>
<td>45%</td>
<td>36%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>Mar</td>
<td>45%</td>
<td>36%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>Apr</td>
<td>50%</td>
<td>45%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>May</td>
<td>45%</td>
<td>40%</td>
<td>27%</td>
<td>10%</td>
</tr>
<tr>
<td>Jun</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Jul</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Aug</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Sep</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Oct</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Nov</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Dec</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

(12 answers in total)
Detailed results for Turkey

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

- Local exhibitions
  - Not clear yet: 39%
  - Later: 35%
  - 2021-H2: 25%
  - Already open: 33%

- National exhibitions
  - Not clear yet: 5%
  - Later: 35%
  - 2021-H2: 25%
  - Already open: 33%

- International exhibitions
  - Not clear yet: 33%
  - Later: 33%
  - 2021-H2: 33%
  - Already open: 33%

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

- Lift of current travel restrictions: 83%
- Mid-term visibility in terms of public policies, including travel restrictions: 58%
- Readiness of exhibiting companies and visitors to participate again: 50%
- Financial incentive packages (leading to reduced costs for the exhibitors): 50%
- Lift of current public policies that apply locally to exhibitions: 25%
- Relevant hygiene measures: 25%
- Other: 8%

(12 answers in total)
Detailed results for Turkey

Revenue compared to 2019

- **2021:** 50%
- **2020:** 24%

<table>
<thead>
<tr>
<th>%</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>14%</td>
<td>0%</td>
</tr>
<tr>
<td>less than 25%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>25-49%</td>
<td>20%</td>
<td>0%</td>
</tr>
<tr>
<td>50-75%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>30%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Average for all companies:

- **2021:** 50%
- **2020:** 24%

Operating Profits

- **2019:**
  - Increased by more than 10%: 8
  - Stable (between -10% and +10%): 17
  - Reduced by 11-50%: 33
  - Reduced by more than 50%: 42
  - Loss: 22

- **2020:**
  - Increased by more than 10%: 8
  - Stable (between -10% and +10%): 17
  - Reduced by 11-50%: 33
  - Reduced by more than 50%: 42
  - Loss: 22

(12 answers in total)
Did your company benefit from public financial support?

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

Have you had to reduce your workforce?

- No
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

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

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

(12 answers in total)
Detailed results for Turkey

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>Turkey</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>31%</td>
<td>29%</td>
</tr>
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<td></td>
</tr>
<tr>
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<td></td>
<td>6%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td></td>
<td>11%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition with other media</td>
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<td>4%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Format of exhibitions in the coming years**

<table>
<thead>
<tr>
<th>Format of exhibitions</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
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<tbody>
<tr>
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<tr>
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</tr>
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<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>50%</td>
<td>37%</td>
</tr>
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<td>Launched digital products not directly related to existing exhibitions</td>
<td>25%</td>
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<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(12 answers in total)
Detailed results for Turkey

Number of fairs projected in 2021

- **22%** Digital
- **21%** Physical
- **57%** Hybrid

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

<table>
<thead>
<tr>
<th>Physical</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Less than 10%</strong></td>
<td>0%</td>
<td>10%</td>
<td>10%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Between 10% and 30%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Between 30% and 50%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>More than 50%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digital</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Less than 10%</strong></td>
<td>0%</td>
<td>10%</td>
<td>10%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Between 10% and 30%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Between 30% and 50%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>More than 50%</strong></td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

(12 answers in total)
Detailed results for UK

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>22%</td>
<td>61%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Feb</td>
<td>61%</td>
<td>33%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Mar</td>
<td>61%</td>
<td>33%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Apr</td>
<td>56%</td>
<td>33%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>May</td>
<td>56%</td>
<td>33%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Jun</td>
<td>44%</td>
<td>33%</td>
<td>50%</td>
<td>17%</td>
</tr>
<tr>
<td>Jul</td>
<td>47%</td>
<td>32%</td>
<td>44%</td>
<td>11%</td>
</tr>
<tr>
<td>Aug</td>
<td>44%</td>
<td>32%</td>
<td>47%</td>
<td>11%</td>
</tr>
<tr>
<td>Sep</td>
<td>44%</td>
<td>32%</td>
<td>47%</td>
<td>11%</td>
</tr>
<tr>
<td>Oct</td>
<td>33%</td>
<td>33%</td>
<td>50%</td>
<td>17%</td>
</tr>
<tr>
<td>Nov</td>
<td>22%</td>
<td>61%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Dec</td>
<td>6%</td>
<td>61%</td>
<td>33%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(18 answers in total)
### Detailed results for UK

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>22%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>later</td>
<td>7%</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>2022-H1</td>
<td>21%</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>2021-H2</td>
<td>59%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>already open</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
</tr>
</tbody>
</table>

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

- **Readiness of exhibiting companies and visitors to participate again**: 78%
- **Lift of current travel restrictions**: 56%
- **Lift of current public policies that apply locally to exhibitions**: 50%
- **Mid-term visibility in terms of public policies, including travel restrictions**: 50%
- **Financial incentive packages (leading to reduced costs for the exhibitors)**: 28%
- **Relevant hygiene measures**: 22%
- **Other**: 6%

(18 answers in total)
Detailed results for UK

Revenue compared to 2019

- **Average for all companies**
  - **2021**: 50%
  - **2020**: 21%

- **Revenue compared to 2019**
  - 0%: 21%
  - less than 25%: 13%
  - 25-49%: 21%
  - 50-75%: 21%
  - more than 75%: 13%

Operating Profits

- **Increase of more than 10%**
  - 6 (2019)

- **Stable (between -10% and +10%)**
  - 18 (2020)

- I don’t know
  - 29

- Reduced by 11-50%
  - 21

- Reduced by more than 50%
  - 7

- Loss
  - 14

- 2019: 50 answers in total

- 2020: 50 answers in total
Did your company benefit from public financial support?

- No: 18%
- Yes, for less than 10% of our 2019 overall costs: 35%
- Yes, for between 10% and 25% of our 2019 overall costs: 12%
- Yes, for between 25% and 50% of our 2019 overall costs: 0%
- Yes, for more than 50% of our 2019 overall costs: 0%
- No, thanks to savings: 35%
- No, thanks to governmental support/short time work allowance: 6%
- Yes, up to 10%: 11%
- Yes, up to 25%: 22%
- Yes, up to 50%: 6%
- Yes, up to 75%: 6%
- Yes, we shut down to the minimum: 0%

Have you had to reduce your workforce?

- No: 22%
- Yes, for less than 10% of our 2019 overall costs: 33%
- Yes, for between 10% and 25% of our 2019 overall costs: 22%
- Yes, for between 25% and 50% of our 2019 overall costs: 6%
- Yes, for more than 50% of our 2019 overall costs: 0%
- No, thanks to savings: 0%
- Yes, up to 10%: 0%
- Yes, up to 25%: 11%
- Yes, up to 50%: 28%
- Yes, up to 75%: 6%
- Yes, we shut down to the minimum: 0%

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

- We’ll manage: 28%
- We’re struggling: 17%
- We’ll survive from our savings: 0%
- No, thanks to governmental support/short time work allowance: 12%
- Yes, up to 10%: 0%
- Yes, up to 25%: 6%
- Yes, up to 50%: 0%
- Yes, up to 75%: 0%
- Yes, we shut down to the minimum: 0%

It’s okay, we have extended our offering to other profitable work areas: 56%
It’s okay, we’ll survive from our savings: 17%
It will be hard, but we can keep our heads above water: 0%
I’m afraid we’d have to close down: 0%
Detailed results for UK

Most important business issues in the exhibition industry

- **Impact of Covid-19 pandemic on the business**: 33% (UK) vs. 29% (Global)
- **State of the economy in home market**: 17% (UK) vs. 19% (Global)
- **Global economic developments**: 8% (UK) vs. 16% (Global)
- **Impact of digitisation**: 12% (UK) vs. 11% (Global)
- **Internal management challenges**: 15% (UK) vs. 7% (Global)
- **Competition from within the exhibition industry**: 2% (UK) vs. 4% (Global)
- **Competition with other media**: 6% (UK) vs. 7% (Global)
- **Regulatory / Stakeholders issues**: 6% (UK) vs. 5% (Global)
- **Other**: 2% (UK) vs. 1% (Global)

Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**: 50% Yes, for sure | 39% Most probably | 11% Not sure
- **Less international “physical” exhibitions, and overall less participants**: 6% Yes, for sure | 69% Most probably | 19% Not sure | 6% Definitely not
- **A push towards “hybrid” events, more digital elements at events**: 18% Yes, for sure | 59% Most probably | 6% Not sure | 6% Definitely not | 12% Not sure at all
- **“Virtual” events replacing “physical” events**: 17% Yes, for sure | 6% Most probably | 11% Not sure | 67% Definitely not

(18 answers in total)
## Digitisation: implementation in UK and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>UK</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows into digital processes</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Detailed results for UK

Number of fairs projected in 2021

- Digital: 10%
- Physical: 69%
- Hybrid: 21%

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

- **Physical**
  - Less than 10%: 12%
  - Between 10% and 30%: 6%
  - Between 30% and 50%: 6%
  - More than 50%: 24%

- **Digital**
  - Less than 10%: 0%
  - Between 10% and 30%: 0%
  - Between 30% and 50%: 0%
  - More than 50%: 41%

(18 answers in total)
Middle East & Africa
Operations - Reopening Exhibitions
Middle East & Africa

Situation of industry operations in 2021

Middle East & Africa

<table>
<thead>
<tr>
<th>Month</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
<th>I Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>21</td>
<td>16</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>Feb</td>
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<td>Mar</td>
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<tr>
<td>Apr</td>
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<tr>
<td>May</td>
<td>15</td>
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<td>16</td>
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<td>Jun</td>
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<td>Jul</td>
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<td>Oct</td>
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<td>Nov</td>
<td>17</td>
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</tr>
<tr>
<td>Dec</td>
<td>17</td>
<td>30</td>
<td>30</td>
<td>16</td>
</tr>
</tbody>
</table>

World

<table>
<thead>
<tr>
<th>Month</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
<th>I Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>53</td>
<td>49</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>Feb</td>
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<td>Mar</td>
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<td>Apr</td>
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<tr>
<td>Jun</td>
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<tr>
<td>Jul</td>
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<td>26</td>
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<td>Aug</td>
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<td>Sep</td>
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<td>Nov</td>
<td>44</td>
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<td>43</td>
<td>26</td>
</tr>
<tr>
<td>Dec</td>
<td>44</td>
<td>43</td>
<td>43</td>
<td>26</td>
</tr>
</tbody>
</table>
When do you believe exhibitions will open again in your city?

### Middle East & Africa

<table>
<thead>
<tr>
<th>Type</th>
<th>Local Exhibitions</th>
<th>National Exhibitions</th>
<th>International Exhibitions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Clear Yet</td>
<td>24</td>
<td>33</td>
<td>51</td>
<td>100</td>
</tr>
<tr>
<td>Later</td>
<td>26</td>
<td>16</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>2022-H1</td>
<td>47</td>
<td>48</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>2021-H2</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Already Open</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### World

<table>
<thead>
<tr>
<th>Type</th>
<th>Local Exhibitions</th>
<th>National Exhibitions</th>
<th>International Exhibitions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Clear Yet</td>
<td>5</td>
<td>6</td>
<td>5</td>
<td>12</td>
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<tr>
<td>Later</td>
<td>26</td>
<td>34</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>2022-H1</td>
<td>38</td>
<td>43</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>2021-H2</td>
<td>29</td>
<td>16</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Already Open</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
### What do you believe would most help the “bounce back” of exhibitions?

#### Middle East & Africa

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>80%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>48%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>43%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>36%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

#### World

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>71%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>58%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>40%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Revenue compared to 2019

Middle East & Africa

<table>
<thead>
<tr>
<th>Turnover</th>
<th>Middle East &amp; Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue compared to 2019</td>
<td></td>
</tr>
<tr>
<td>2020: 28%</td>
<td>2021: 34%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover</th>
<th>World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue compared to 2019</td>
<td></td>
</tr>
<tr>
<td>2020: 28%</td>
<td>2021: 48%</td>
</tr>
</tbody>
</table>
Operating profits
Middle East & Africa

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>33</td>
<td>10</td>
</tr>
<tr>
<td>I don’t know</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>3</td>
<td>51</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>6</td>
<td>36</td>
</tr>
<tr>
<td>Loss</td>
<td>2019</td>
<td>2020</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>51</td>
<td>51</td>
</tr>
</tbody>
</table>

%
Did your company benefit from public financial support?

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

**Middle East & Africa**: 83%

**World**: 52%
Have you had to reduce your workforce?

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

**Middle East & Africa**
- No: 17%
- Yes, up to 10%: 26%
- Yes, up to 25%: 18%

**World**
- No: 10%
- Yes, up to 10%: 24%
- Yes, up to 25%: 20%
- Yes, up to 50%: 12%
- Yes, up to 75%: 16%
- Yes, we shut down to the minimum: 7%
If there is no business for the next 6 months, which best applies?

- Middle East & Africa
- World

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

WE’LL MANAGE
Middle East & Africa 41%
World 34%

WE’RE STRUGGLING
Middle East & Africa 59%
World 66%
Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 34% (Global: 29%)
- State of the economy in home market: 22% (Global: 19%)
- Global economic developments: 20% (Global: 16%)
- Impact of digitisation: 8% (Global: 11%)
- Internal management challenges: 3% (Global: 7%)
- Competition from within the exhibition industry: 3% (Global: 4%)
- Competition with other media: 2% (Global: 7%)
- Regulatory / Stakeholders issues: 6% (Global: 5%)
- Other: 2% (Global: 1%)

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: Yes, for sure 60% / Most probably 20% / Not sure 15% / Not sure at all 3% / Definitely not 3%
- Less international “physical” exhibitions, and overall less participants: Yes, for sure 3% / Most probably 42% / Not sure 44% / Not sure at all 11%
- A push towards “hybrid” events, more digital elements at events: Yes, for sure 10% / Most probably 61% / Not sure 12% / Not sure at all 7% / Definitely not 10%
- “Virtual” events replacing “physical” events: Yes, for sure 8% / Most probably 23% / Not sure 10% / Not sure at all 60%
## Digitisation: implementation in Middle East & Africa and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Middle East &amp; Africa</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>11%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Number of fairs projected in 2021
Middle East & Africa

Middle East & Africa

- Digital: 27%
- Physical: 48%
- Hybrid: 25%

World

- Digital: 30%
- Physical: 50%
- Hybrid: 20%
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

### Middle East & Africa

#### Physical Contributions
- Less than 10%: 11%
- Between 10% and 30%: 11%
- Between 30% and 50%: 5%
- More than 50%: 34%

#### Digital Contributions
- Less than 10%: 0%
- Between 10% and 30%: 8%
- Between 30% and 50%: 11%
- More than 50%: 16%

### World

#### Physical Contributions
- Less than 10%: 6%
- Between 10% and 30%: 10%
- Between 30% and 50%: 6%
- More than 50%: 37%

#### Digital Contributions
- Less than 10%: 0%
- Between 10% and 30%: 6%
- Between 30% and 50%: 0%
- More than 50%: 34%
Expanded activities (for venues only)

Middle East & Africa

- Streaming of digital events (broadcast studio): 86%
- Vaccination centre: 43%
- Sports and entertainment events stage: 29%
- Site to generate brand activations: 29%
- Hospital: 29%

Middle & East Africa

World

- Streaming of digital events (broadcast studio): 56%
- Vaccination centre: 49%
- Sports and entertainment events stage: 35%
- Site to generate brand activations: 26%
- Hospital: 22%
### Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>20</td>
<td>53</td>
<td>27</td>
<td>33</td>
</tr>
<tr>
<td>Feb</td>
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<tr>
<td>Mar</td>
<td>8</td>
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<td>33</td>
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<td>Apr</td>
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<td>Jul</td>
<td>11</td>
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<td>Aug</td>
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<td>Sep</td>
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<td>Nov</td>
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<td>67</td>
</tr>
<tr>
<td>Dec</td>
<td></td>
<td></td>
<td>56</td>
<td></td>
</tr>
</tbody>
</table>

(15 answers in total)
Detailed results for United Arab Emirates

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

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>87%</td>
<td>33</td>
<td>32</td>
<td>29</td>
</tr>
</tbody>
</table>

- Lift of current travel restrictions: 87%
- Mid-term visibility in terms of public policies, including travel restrictions: 53%
- Lift of current public policies that apply locally to exhibitions: 40%
- Readiness of exhibiting companies and visitors to participate again: 33%
- Financial incentive packages (leading to reduced costs for the exhibitors): 33%
- Relevant hygiene measures: 33%
- Other: 7%

(15 answers in total)
**Detailed results for United Arab Emirates**

**Revenue compared to 2019**

- **Average for all companies**
  - **2021**: 60%
  - **2020**: 34%

**Operating Profits**

- **Increase of more than 10%**: 8
- **Stable (between -10% and +10%)**: 23
- **I don't know**: 23
- **Reduced by 11-50%**: 15
- **Reduced by more than 50%**: 31
- **Loss**: 25

- **2019**:
  - **20%**: 8
  - **25%**: 23
  - **25%**: 23
  - **25%**: 15
  - **31%**: 31

- **2020**:
  - **15 answers in total**
  - **13%**: 13
  - **0%**: 13
  - **0%**: 13
  - **0%**: 0
  - **75%**: 33

27th UFI Global Exhibition Barometer / July 2021 ©
Did your company benefit from public financial support?

- **No**: 92%
- **Yes**: 8%

Have you had to reduce your workforce?

- **No**: 43%
- **Yes**: 57%

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

- **I’m afraid we’d have to close down**: 7%
- **We’ll manage**: 64%
- **We’re struggling**: 36%

---

**Options for Did your company benefit from public financial support?**
- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

**Options for Have you had to reduce your workforce?**
- No, thanks to savings
- No, thanks to governmental support/ short time work allowance
- Yes, up to 10%
- Yes, up to 25%
- Yes, up to 50%
- Yes, up to 75%
- Yes, we shut down to the minimum

**Options for If there is no business for the next 6 months, which best applies?**
- It’s okay, we have extended our offering to other profitable work areas
- It’s okay, we’ll survive from our savings
- It will be hard, but we can keep our heads above water
- I’m afraid we’d have to close down
Detailed results for United Arab Emirates

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

- **Impact of Covid-19 pandemic on the business**: 33% United Arab Emirates, 29% Global
- **State of the economy in home market**: 21% United Arab Emirates, 19% Global
- **Global economic developments**: 31% United Arab Emirates, 16% Global
- **Impact of digitisation**: 2% United Arab Emirates, 11% Global
- **Internal management challenges**: 0% United Arab Emirates, 7% Global
- **Competition from within the exhibition industry**: 5% United Arab Emirates, 4% Global
- **Competition with other media**: 0% United Arab Emirates, 7% Global
- **Regulatory / Stakeholders issues**: 7% United Arab Emirates, 5% Global
- **Other**: 0% United Arab Emirates, 1% Global

**Format of exhibitions in the coming years**

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**: 60% United Arab Emirates, 20% Global, 13% Not sure at all, 7% Definitely not
- **Less international “physical” exhibitions, and overall less participants**: 43% United Arab Emirates, 43% Not sure at all, 14% Definitely not
- **A push towards “hybrid” events, more digital elements at events**: 7% United Arab Emirates, 60% Not sure at all, 20% Definitely not, 13% Definitely not
- **“Virtual” events replacing “physical” events**: 13% United Arab Emirates, 7% Definitely not, 80% Definitely not
## Digitisation: implementation in United Arab Emirates and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>United Arab Emirates</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>40%</td>
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<td>7%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(15 answers in total)
Detailed results for United Arab Emirates

Number of fairs projected in 2021

Digital: 54%
Physical: 24%
Hybrid: 22%

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

Digital:
- Less than 10%: 17%
- Between 10% and 30%: 0%
- Between 30% and 50%: 0%
- More than 50%: 33%

Physical:
- Less than 10%: 0%
- Between 10% and 30%: 0%
- Between 30% and 50%: 8%
- More than 50%: 25%

(15 answers in total)
Detailed results for South Africa

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>6</td>
<td>81</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Feb</td>
<td>6</td>
<td>81</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Mar</td>
<td>6</td>
<td>63</td>
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<td>14</td>
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<td>Apr</td>
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<td>May</td>
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<td>Jun</td>
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<tr>
<td>Nov</td>
<td>7</td>
<td>21</td>
<td>57</td>
<td>14</td>
</tr>
<tr>
<td>Dec</td>
<td>21</td>
<td></td>
<td>50</td>
<td>14</td>
</tr>
</tbody>
</table>

(16 answers in total)
When do you believe exhibitions will open again in your city?

- Not clear yet: 27%
- Later: 38%
- 2022-H1: 59%
- 2021-H2: 62%
- Already open: 79%

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

- Lift of current travel restrictions: 81%
- Lift of current public policies that apply locally to exhibitions: 81%
- Readiness of exhibiting companies and visitors to participate again: 44%
- Mid-term visibility in terms of public policies, including travel restrictions: 38%
- Relevant hygiene measures: 31%
- Financial incentive packages (leading to reduced costs for the exhibitors): 25%
- Other: 13%

(16 answers in total)
Detailed results for South Africa

Revenue compared to 2019

- Average for all companies:
  - 2020: 16%
  - 2021: 15%

- Breakdown by percentage change:
  - 0%: 13% in 2020, 7% in 2021
  - less than 25%: 19% in 2020, 0% in 2021
  - 25-49%: 56% in 2020, 25% in 2021
  - 50-75%: 7% in 2020, 7% in 2021
  - more than 75%: 0% in 2020, 0% in 2021

Operating Profits

- Increase of more than 10%:
  - 2019: 25%, 2020: 7%
  - 2019: 7%, 2020: 7%

- Stable (between -10% and +10%):
  - 2019: 25%, 2020: 20%
  - 2019: 10%, 2020: 20%

- Reduced by 11-50%:
  - 2019: 15%, 2020: 20%
  - 2019: 15%, 2020: 20%

- Reduced by more than 50%:
  - 2019: 5%, 2020: 10%
  - 2019: 5%, 2020: 10%

- Loss:
  - 2019: 25%, 2020: 67%
  - 2019: 25%, 2020: 67%

(16 answers in total)
### Detailed results for South Africa

#### Did your company benefit from public financial support?

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>67%</td>
</tr>
<tr>
<td>Yes, for less than 10% of 2019 overall costs</td>
<td>20%</td>
</tr>
<tr>
<td>Yes, for between 10% and 25% of 2019 overall costs</td>
<td>13%</td>
</tr>
<tr>
<td>Yes, for between 25% and 50% of 2019 overall costs</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, for more than 50% of 2019 overall costs</td>
<td>0%</td>
</tr>
</tbody>
</table>

#### Have you had to reduce your workforce?

<table>
<thead>
<tr>
<th>Reduction Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, thanks to savings</td>
<td>7%</td>
</tr>
<tr>
<td>No, thanks to governmental support/ short time work allowance</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, up to 10%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, up to 25%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, up to 25%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, up to 50%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, up to 75%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, we shut down to the minimum</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's okay, we have extended our offering to other profitable work areas</td>
<td>7%</td>
</tr>
<tr>
<td>It's okay, we'll survive from our savings</td>
<td>7%</td>
</tr>
<tr>
<td>It will be hard, but we can keep our heads above water</td>
<td>7%</td>
</tr>
<tr>
<td>I'm afraid we'd have to close down</td>
<td>7%</td>
</tr>
<tr>
<td>WE'LL MANAGE</td>
<td>67%</td>
</tr>
<tr>
<td>WE'RE STRUGGLING</td>
<td>20%</td>
</tr>
</tbody>
</table>

(16 answers in total)
### Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>South Africa</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>35%</td>
<td>5%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**
  - Yes, for sure: 47%
  - Most probably: 20%
  - Not sure: 27%
  - Not sure at all: 7%
  - Definitely not: 7%

- **Less international “physical” exhibitions, and overall less participants**
  - Yes, for sure: 38%
  - Most probably: 62%

- **A push towards “hybrid” events, more digital elements at events**
  - Yes, for sure: 13%
  - Most probably: 67%
  - Not sure: 7%
  - Not sure at all: 7%

- **“Virtual” events replacing “physical” events**
  - Yes, for sure: 13%
  - Most probably: 20%
  - Not sure: 20%
  - Not sure at all: 47%
Digitisation: implementation in South Africa and globally

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage): 75%
- Developed a digital / transformation strategy for individual exhibitions / products: 56%
- Changed internal processes and workflows in our company into digital processes: 38%
- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.): 38%
- Launched digital products not directly related to existing exhibitions: 31%
- Developed a digital / transformation strategy for the whole company: 13%
- Other: 6%

(16 answers in total)
Detailed results for South Africa

Number of fairs projected in 2021

- Digital: 43%
- Physical: 34%
- Hybrid: 23%

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

<table>
<thead>
<tr>
<th>Physical</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13%</td>
<td>20%</td>
<td>0%</td>
<td>27%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digital</th>
<th>Less than 10%</th>
<th>Between 10% and 30%</th>
<th>Between 30% and 50%</th>
<th>More than 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>7%</td>
<td>20%</td>
<td>13%</td>
</tr>
</tbody>
</table>

(16 answers in total)
Operations - Reopening Exhibitions
Asia & Pacific

Situation of industry operations in 2021

Asia & Pacific

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>I Don't Know</td>
<td>15</td>
<td>16</td>
<td>21</td>
<td>18</td>
<td>19</td>
<td>24</td>
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</tbody>
</table>

World

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
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<td>47</td>
</tr>
<tr>
<td>No Activity</td>
<td>35</td>
<td>37</td>
<td>40</td>
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<td>49</td>
<td>46</td>
<td>41</td>
<td>39</td>
<td>36</td>
<td>36</td>
<td>32</td>
</tr>
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<td>39</td>
<td>38</td>
<td>36</td>
<td>36</td>
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<td>46</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
### When do you believe exhibitions will open again in your city?

#### Asia & Pacific

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>30</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>later</td>
<td>26</td>
<td>39</td>
<td>51</td>
</tr>
<tr>
<td>2022-H1</td>
<td>36</td>
<td>51</td>
<td>18</td>
</tr>
<tr>
<td>2021-H2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>already open</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### World

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>5</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>later</td>
<td>26</td>
<td>50</td>
<td>12</td>
</tr>
<tr>
<td>2022-H1</td>
<td>38</td>
<td>50</td>
<td>12</td>
</tr>
<tr>
<td>2021-H2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>already open</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What do you believe would most help the “bounce back” of exhibitions?

### Asia & Pacific

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>77%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>54%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>52%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>41%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>35%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

### World

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift of current travel restrictions</td>
<td>71%</td>
</tr>
<tr>
<td>Readiness of exhibiting companies and visitors to participate again</td>
<td>58%</td>
</tr>
<tr>
<td>Lift of current public policies that apply locally to exhibitions</td>
<td>55%</td>
</tr>
<tr>
<td>Mid-term visibility in terms of public policies, including travel restrictions</td>
<td>45%</td>
</tr>
<tr>
<td>Financial incentive packages (leading to reduced costs for the exhibitors)</td>
<td>40%</td>
</tr>
<tr>
<td>Relevant hygiene measures</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Revenue compared to 2019

Asia & Pacific

- **2020**: 27%
- **2021**: 48%

Average for all companies

- 2020: 27%
- 2021: 45%

World

- **2020**: 28%
- **2021**: 48%

Average for all companies

- 2020: 28%
- 2021: 43%
Operating profits
Asia & Pacific

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>34</td>
<td>25</td>
</tr>
<tr>
<td>I don't know</td>
<td>9</td>
<td>44</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Loss</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>24</td>
<td>36</td>
</tr>
<tr>
<td>I don't know</td>
<td>9</td>
<td>51</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Loss</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

%
Did your company benefit from public financial support?

**Asia & Pacific**
- 51% No
- 27% Yes, for less than 10% of 2019 overall costs
- 13% Yes, for between 10% and 25% of 2019 overall costs
- 5% Yes, for between 25% and 50% of 2019 overall costs
- 4% Yes, for more than 50% of 2019 overall costs

**World**
- 52% No
- 26% Yes, for less than 10% of 2019 overall costs
- 14% Yes, for between 10% and 25% of 2019 overall costs
- 5% Yes, for between 25% and 50% of 2019 overall costs
- 3% Yes, for more than 50% of 2019 overall costs
Have you had to reduce your workforce?

**Asia & Pacific**

- Yes, up to 10%: 13%
- Yes, up to 25%: 16%
- Yes, up to 50%: 18%
- Yes, up to 75%: 16%
- Yes, we shut down to the minimum: 3%

**World**

- Yes, up to 10%: 9%
- Yes, up to 25%: 16%
- Yes, up to 50%: 14%
- Yes, up to 75%: 5%
- Yes, we shut down to the minimum: 6%

**Percentage of YES and NO responses**

- Yes: 52% (Asia & Pacific) vs 57% (World)
- No: 48% (Asia & Pacific) vs 43% (World)
If there is no business for the next 6 months, which best applies?

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

### Asia & Pacific
- **We'll manage**: 16%
- **We're struggling**: 18%

### World
- **We'll manage**: 13%
- **We're struggling**: 18%

### Comparison
- **We'll manage**: 35% Asia & Pacific vs 34% World
- **We're struggling**: 50% Asia & Pacific vs 57% World

---

---
Most important business issues in the exhibition industry

- **Impact of Covid-19 pandemic on the business**: 30% (Asia & Pacific), 32% (Global)
- **State of the economy in home market**: 17% (Asia & Pacific), 17% (Global)
- **Global economic developments**: 14% (Asia & Pacific), 18% (Global)
- **Impact of digitisation**: 9% (Asia & Pacific), 11% (Global)
- **Internal management challenges**: 10% (Asia & Pacific), 7% (Global)
- **Competition from within the exhibition industry**: 6% (Asia & Pacific), 4% (Global)
- **Competition with other media**: 6% (Asia & Pacific), 7% (Global)
- **Regulatory / Stakeholders issues**: 6% (Asia & Pacific), 5% (Global)
- **Other**: 3% (Asia & Pacific), 1% (Global)

Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**: 39% (Yes, for sure) - 40% (Most probably) - 20% (Not sure) - 1% (Not at all)
- **Less international “physical” exhibitions, and overall less participants**: 8% (Yes, for sure) - 47% (Most probably) - 30% (Not sure) - 16% (Not at all)
- **A push towards “hybrid” events, more digital elements at events**: 27% (Yes, for sure) - 48% (Most probably) - 15% (Not sure) - 6% (Not at all)
- **“Virtual” events replacing “physical” events**: 5% (Yes, for sure) - 9% (Most probably) - 22% (Not sure) - 17% (Not at all) - 48% (Definitely not)
## Digitisation: implementation in Asia/Pacific and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Asia &amp; Pacific</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>67%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>35%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Respective contributions from PHYSICAL (ON-SITE) AND HYBRID ACTIVITIES / DIGITAL ONLY (ONLINE) ACTIVITIES estimated for the income of the next 2 years

### Asia & Pacific

**Physical**
- Less than 10%
- Between 10% and 30%
- Between 30% and 50%
- More than 50%

**Digital**
- Less than 10%
- Between 10% and 30%
- Between 30% and 50%
- More than 50%

### World

**Physical**
- Less than 10%
- Between 10% and 30%
- Between 30% and 50%
- More than 50%

**Digital**
- Less than 10%
- Between 10% and 30%
- Between 30% and 50%
- More than 50%
Expanded activities (for venues only)

Asia & Pacific

- Streaming of digital events (broadcast studio): 52%
- Vaccination centre: 48%
- Sports and/or entertainment events stage: 43%
- Site to generate brand activations: 30%
- Hospital: 9%

World

- Streaming of digital events (broadcast studio): 56%
- Vaccination centre: 49%
- Sports and/or entertainment events stage: 35%
- Site to generate brand activations: 26%
- Hospital: 22%
Detailed results for Australia

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know (%)</th>
<th>No Activity (%)</th>
<th>Reduced (%)</th>
<th>Normal (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>31</td>
<td>69</td>
<td>69</td>
<td>14</td>
</tr>
<tr>
<td>Feb</td>
<td>23</td>
<td>71</td>
<td>77</td>
<td>15</td>
</tr>
<tr>
<td>Mar</td>
<td>14</td>
<td>69</td>
<td>77</td>
<td>23</td>
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<tr>
<td>Apr</td>
<td>15</td>
<td>82</td>
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<td>May</td>
<td>9</td>
<td>77</td>
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<td>8</td>
</tr>
<tr>
<td>Jun</td>
<td>8</td>
<td>69</td>
<td>62</td>
<td>8</td>
</tr>
<tr>
<td>Jul</td>
<td>8</td>
<td>69</td>
<td>69</td>
<td>8</td>
</tr>
<tr>
<td>Aug</td>
<td>8</td>
<td>77</td>
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<td>8</td>
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<tr>
<td>Sep</td>
<td>8</td>
<td>62</td>
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<td>23</td>
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<td>Oct</td>
<td>23</td>
<td>77</td>
<td>77</td>
<td>15</td>
</tr>
<tr>
<td>Nov</td>
<td>21</td>
<td>23</td>
<td>57</td>
<td>14</td>
</tr>
<tr>
<td>Dec</td>
<td>(15 answers in total)</td>
<td>(15 answers in total)</td>
<td>(15 answers in total)</td>
<td>(15 answers in total)</td>
</tr>
</tbody>
</table>
Detailed results for Australia

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>4</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>later</td>
<td>17</td>
<td>30</td>
<td>40</td>
</tr>
<tr>
<td>2022-H1</td>
<td>26</td>
<td>22</td>
<td>40</td>
</tr>
<tr>
<td>2021-H2</td>
<td>52</td>
<td>43</td>
<td>27</td>
</tr>
<tr>
<td>already open</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 64%
- Financial incentive packages (leading to reduced costs for the exhibitors): 43%
- Mid-term visibility in terms of public policies, including travel restrictions: 36%
- Readiness of exhibiting companies and visitors to participate again: 29%
- Lift of current public policies that apply locally to exhibitions: 21%
- Relevant hygiene measures: 14%
- Other: 14%

(15 answers in total)
Detailed results for Australia

Revenue compared to 2019

- **2020**: 19%
- **2021**: 46%

Average for all companies

<table>
<thead>
<tr>
<th>Percentage Range</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>0% - less than 25%</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>25% - 49%</td>
<td>0%</td>
<td>13%</td>
</tr>
<tr>
<td>50% - 75%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>6%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Operating Profits

- **Increase of more than 10%**: 32%
- **Stable (between -10% and +10%)**: 45%
- **I don’t know**: 21%
- **Reduced by 11-50%**: 43%
- **Reduced by more than 50%**: 21%
- **Loss**: 19%

(15 answers in total)
Detailed results for Australia

Did your company benefit from public financial support?

- No: 20%
- Yes, for less than 10% of our 2019 overall costs: 27%
- Yes, for between 10% and 25% of our 2019 overall costs: 7%
- Yes, for between 25% and 50% of our 2019 overall costs: 7%
- Yes, for more than 50% of our 2019 overall costs: 40%

Have you had to reduce your workforce?

- No: 7%
- Yes, up to 10%: 33%
- Yes, up to 25%: 20%
- Yes, up to 50%: 27%
- Yes, up to 75%: 7%
- Yes, we shut down to the minimum: 7%

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

- No: 7%
- Yes, thanks to savings: 21%
- Yes, thanks to governmental support/ short time work allowance: 43%
- Yes, up to 10%: 29%
- Yes, up to 25%: 21%
- Yes, up to 50%: 29%
- Yes, up to 75%: 29%
- Yes, we shut down to the minimum: 29%
- It's okay, we have extended our offering to other profitable work areas: 29%
- It's okay, we'll survive from our savings: 21%
- It will be hard, but we can keep our heads above water: 21%
- I'm afraid we'd have to close down: 21%
Detailed results for Australia

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>Australia</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>41%</td>
<td>29%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>9%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>12%</td>
<td>7%</td>
</tr>
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<td>Competition from within the exhibition industry</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly
  - Yes, for sure: 8%
  - Most probably: 77%
  - Not sure: 15%

- Less international “physical” exhibitions, and overall less participants
  - Definitely not: 17%
  - Not sure at all: 58%
  - Not sure: 25%

- A push towards “hybrid” events, more digital elements at events
  - Yes, for sure: 36%
  - Most probably: 29%
  - Not sure at all: 14%
  - Not sure: 14%
  - Definitely not: 7%

- “Virtual” events replacing “physical” events
  - Yes, for sure: 7%
  - Most probably: 14%
  - Not sure at all: 21%
  - Not sure: 29%
  - Definitely not: 29%

(15 answers in total)
### Digitisation: implementation in Australia and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Australia</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>107%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>87%</td>
<td>87%</td>
</tr>
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<td>Changed internal processes and workflows in our company into digital processes</td>
<td>87%</td>
<td>37%</td>
</tr>
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<td>Launched digital products not directly related to existing exhibitions</td>
<td>67%</td>
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<td>40%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*15 answers in total*
Detailed results for Australia

Number of fairs projected in 2021

- 76% Digital
- 12% Physical
- 11% Hybrid

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

**Physical**
- Less than 10%: 0%
- Between 10% and 30%: 0%
- Between 30% and 50%: 0%
- More than 50%: 69%

**Digital**
- Less than 10%: 0%
- Between 10% and 30%: 8%
- Between 30% and 50%: 0%
- More than 50%: 0%
Detailed results for China

Situation of industry operations in 2021

(21 answers in total)
Detailed results for China

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>4</td>
<td>7</td>
<td>32</td>
</tr>
<tr>
<td>later</td>
<td>19</td>
<td>23</td>
<td>9</td>
</tr>
<tr>
<td>2021-H2</td>
<td>59</td>
<td>43</td>
<td>14</td>
</tr>
<tr>
<td>already open</td>
<td></td>
<td></td>
<td>18</td>
</tr>
</tbody>
</table>

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

- Readiness of exhibiting companies and visitors to participate again: 60%
- Mid-term visibility in terms of public policies, including travel restrictions: 50%
- Financial incentive packages (leading to reduced costs for the exhibitors): 50%
- Lift of current travel restrictions: 45%
- Lift of current public policies that apply locally to exhibitions: 45%
- Relevant hygiene measures: 45%
- Other: 5%

(21 answers in total)
### Detailed results for China

#### Revenue compared to 2019

**Average for all companies**

- **2021**: 63%
- **2020**: 45%

**2020 Revenue compared to 2019**

- 0%: 0%
- less than 25%: 14%
- 25-49%: 24%
- 50-75%: 33%
- more than 75%: 43%

**2021 Revenue compared to 2019**

- 0%: 0%
- less than 25%: 0%
- 25-49%: 24%
- 50-75%: 29%
- more than 75%: 47%

#### Operating Profits

<table>
<thead>
<tr>
<th>Increase of more than 10%</th>
<th>2019: 10</th>
<th>2020: 41</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>I don’t know</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>25</td>
<td>41</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>Loss</td>
<td>20</td>
<td>17</td>
</tr>
</tbody>
</table>

(21 answers in total)
Detailed results for China

### Did your company benefit from public financial support?

- **No**: 42%
- **Yes, for less than 10% of our 2019 overall costs**: 37%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 11%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 11%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **No, thanks to savings**: 0%
- **No, thanks to governmental support/short time work allowance**: 0%
- **Yes, up to 10%**: 5%
- **Yes, up to 25%**: 5%
- **Yes, up to 50%**: 5%
- **Yes, up to 75%**: 5%
- **Yes, we shut down to the minimum**: 0%

### Have you had to reduce your workforce?

- **No**: 62%
- **Yes**: 38%
- **No, thanks to savings**: 5%
- **No, thanks to governmental support/short time work allowance**: 5%
- **Yes, up to 10%**: 0%
- **Yes, up to 25%**: 5%
- **Yes, up to 50%**: 5%
- **Yes, up to 75%**: 5%
- **Yes, we shut down to the minimum**: 0%

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

- **We'll manage**: 38%
- **We're struggling**: 62%
- **No business for the next 6 months**: 19%
- **I'm afraid we'd have to close down**: 19%
- **It's okay, we have extended our offering to other profitable work areas**: 10%
- **It's okay, we'll survive from our savings**: 10%
- **It will be hard, but we can keep our heads above water**: 10%
- **We won't survive, we'll shut down to the minimum**: 10%

(21 answers in total)
**Detailed results for China**

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>China</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>27%</td>
<td>16%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Format of exhibitions in the coming years**

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**
  - Yes, for sure: 41%
  - Most probably: 29%
  - Not sure: 29%

- **Less international “physical” exhibitions, and overall less participants**
  - Definitely not: 71%
  - Not sure: 21%
  - Not at all: 7%

- **A push towards “hybrid” events, more digital elements at events**
  - Most probably: 71%
  - Not sure: 12%

- **“Virtual” events replacing “physical” events**
  - Most probably: 71%
  - Not sure: 25%
  - Definitely not: 31%

*(21 answers in total)*
Digitisation: implementation in China and globally

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)
  - China: 43%
  - Global: 58%

- Changed internal processes and workflows in our company into digital processes
  - China: 43%
  - Global: 40%

- Developed a digital / transformation strategy for individual exhibitions / products
  - China: 33%
  - Global: 37%

- Developed a digital / transformation strategy for the whole company
  - China: 14%
  - Global: 25%

- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)
  - China: 10%
  - Global: 22%

- Launched digital products not directly related to existing exhibitions
  - China: 5%
  - Global: 10%

- Other
  - China: 0%
  - Global: 6%

(21 answers in total)
Detailed results for China

Number of fairs projected in 2021

- 57% Digital
- 33% Physical
- 10% Hybrid

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

- **Physical**
  - Less than 10%: 42%
  - Between 10% and 30%: 11%
  - Between 30% and 50%: 16%
  - More than 50%: 11%

- **Digital**
  - Less than 10%: 0%
  - Between 10% and 30%: 5%
  - Between 30% and 50%: 0%
  - More than 50%: 0% – 42% (21 answers in total)
Detailed results for Hong Kong

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>50</td>
<td>60</td>
<td>70</td>
<td>10</td>
</tr>
<tr>
<td>Feb</td>
<td>30</td>
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<td>60</td>
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</tr>
<tr>
<td>Mar</td>
<td>30</td>
<td>30</td>
<td>50</td>
<td>30</td>
</tr>
<tr>
<td>Apr</td>
<td>30</td>
<td>30</td>
<td>60</td>
<td>40</td>
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<tr>
<td>May</td>
<td>30</td>
<td>30</td>
<td>50</td>
<td>30</td>
</tr>
<tr>
<td>Jun</td>
<td>20</td>
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<td>Jul</td>
<td>20</td>
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<td>30</td>
</tr>
<tr>
<td>Aug</td>
<td>20</td>
<td>20</td>
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<tr>
<td>Sep</td>
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<tr>
<td>Oct</td>
<td>20</td>
<td>20</td>
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<td>30</td>
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<tr>
<td>Nov</td>
<td>20</td>
<td>20</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Dec</td>
<td>10</td>
<td>10</td>
<td>40</td>
<td>30</td>
</tr>
</tbody>
</table>
Detailed results for Hong Kong

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

- Not clear yet: 20%
- Later: 40%
- 2022-H1: 30%
- 2021-H2: 82%
- Already open: 10%

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

- Lift of current travel restrictions: 70%
- Lift of current public policies that apply locally to exhibitions: 50%
- Mid-term visibility in terms of public policies, including travel restrictions: 50%
- Financial incentive packages (leading to reduced costs for the exhibitors): 40%
- Readiness of exhibiting companies and visitors to participate again: 30%
- Relevant hygiene measures: 30%
- Other: 0%

(10 answers in total)
Detailed results for Hong Kong

Revenue compared to 2019

- **Average for all companies**
  - 2021: 37%
  - 2020: 27%

- 0% 0% less than 25%
- 10% 10% 25-49%
- 40% 30% 50-75%
- 50% 0% more than 75%

Operating Profits

- 10% Increase of more than 10%
- 20% Stable (between -10% and +10%)
- 70% Reduced by more than 50%
- 10% Reduced by 11-50%
- 10% I don’t know
- 10% Loss

2019 2020

(10 answers in total)
Detailed results for Hong Kong

**Did your company benefit from public financial support?**

- No: 30%
- Yes, for less than 10% of our 2019 overall costs: 30%
- Yes, for between 10% and 25% of our 2019 overall costs: 30%
- Yes, for more than 50% of our 2019 overall costs: 10%

**Have you had to reduce your workforce?**

- No, thanks to savings: 20%
- Yes, thanks to governmental support/short time work allowance: 10%
- Yes, up to 10%: 20%
- Yes, up to 25%: 30%
- Yes, up to 50%: 10%
- Yes, up to 75%: 0%
- Yes, we shut down to the minimum: 10%

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

- It’s okay, we have extended our offering to other profitable work areas: 20%
- It’s okay, we’ll survive from our savings: 20%
- It will be hard, but we can keep our heads above water: 50%
- I’m afraid we’d have to close down: 10%
Detailed results for Hong Kong

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>Global</th>
<th>Hong Kong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

1. Covid-19 confirms the value of face to face events - sector bounces back quickly
   - Yes, for sure: 20%
   - Most probably: 60%
   - Not sure at all: 20%

2. Less international “physical” exhibitions, and overall less participants
   - Not sure: 56%
   - Not at all: 33%
   - Definitely not: 11%

3. A push towards “hybrid” events, more digital elements at events
   - Not sure: 50%
   - Not at all: 10%
   - Definitely not: 20%

4. “Virtual” events replacing “physical” events
   - Not sure: 80%
Digitisation: implementation in Hong Kong and globally

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage): 40% (Hong Kong), 58% (Global)
- Changed internal processes and workflows in our company into digital processes: 40% (Hong Kong), 40% (Global)
- Developed a digital / transformation strategy for individual exhibitions / products: 30% (Hong Kong), 37% (Global)
- Launched digital products not directly related to existing exhibitions: 30% (Hong Kong), 25% (Global)
- Developed a digital / transformation strategy for the whole company: 10% (Hong Kong), 22% (Global)
- Other: 10% (Hong Kong), 10% (Global)
- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.): 0% (Hong Kong), 6% (Global)

(10 answers in total)
Detailed results for Hong Kong

Number of fairs projected in 2021

- 60% Physical
- 32% Hybrid
- 8% Digital

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

Physical
- Less than 10%: 0%
- Between 10% and 30%: 0%
- Between 30% and 50%: 40%
- More than 50%: 0%

Digital
- Less than 10%: 0%
- Between 10% and 30%: 10%
- Between 30% and 50%: 10%
- More than 50%: 0%
Detailed results for India

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>38%</td>
<td>42%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Feb</td>
<td>35%</td>
<td>43%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Mar</td>
<td>43%</td>
<td>39%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>Apr</td>
<td>57%</td>
<td>33%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>May</td>
<td>44%</td>
<td>38%</td>
<td>13%</td>
<td>13%</td>
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<tr>
<td>Jun</td>
<td>38%</td>
<td>36%</td>
<td>14%</td>
<td>14%</td>
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<tr>
<td>Jul</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
<td>14%</td>
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<tr>
<td>Aug</td>
<td>21%</td>
<td>21%</td>
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<tr>
<td>Sep</td>
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<tr>
<td>Oct</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
<td>14%</td>
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<tr>
<td>Nov</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Dec</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>

(24 answers in total)
Detailed results for India

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>2 (4%)</td>
<td>6 (13%)</td>
<td>2 (8%)</td>
</tr>
<tr>
<td>later</td>
<td>35 (44%)</td>
<td>44 (48%)</td>
<td></td>
</tr>
<tr>
<td>2022-H1</td>
<td>48 (55%)</td>
<td>44 (48%)</td>
<td></td>
</tr>
<tr>
<td>2021-H2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>already open</td>
<td>11 (48%)</td>
<td>6 (24%)</td>
<td>8 (33%)</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 83%
- Readiness of exhibiting companies and visitors to participate again: 67%
- Relevant hygiene measures: 50%
- Lift of current public policies that apply locally to exhibitions: 46%
- Financial incentive packages (leading to reduced costs for the exhibitors): 46%
- Mid-term visibility in terms of public policies, including travel restrictions: 42%
- Other: 4% (24 answers in total)
Detailed results for India

Revenue compared to 2019

- **Average for all companies**
  - 2021: 38%
  - 2020: 17%

<table>
<thead>
<tr>
<th>Percentage Range</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td>less than 25%</td>
<td>14%</td>
<td>0%</td>
</tr>
<tr>
<td>25-49%</td>
<td>47%</td>
<td>42%</td>
</tr>
<tr>
<td>50-75%</td>
<td>42%</td>
<td>41%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Operating Profits

- **Increase of more than 10%**
  - 2019: 10, 2020: 5

- **Stable (between -10% and +10%)**
  - 2019: 71, 2020: 29

- **I don’t know**
  - 2019: 14, 2020: 14

- **Reduced by 11-50%**
  - 2019: 0, 2020: 48

- **Reduced by more than 50%**
  - 2019: 4, 2020: 0

- **Loss**
  - 2019: 0, 2020: 0

(24 answers in total)
Detailed results for India

Did your company benefit from public financial support?

- No: 95%
- Yes, for less than 10% of our 2019 overall costs: 5%
- Yes, for between 10% and 25% of our 2019 overall costs: 0%
- Yes, for between 25% and 50% of our 2019 overall costs: 0%
- Yes, for more than 50% of our 2019 overall costs: 0%

Have you had to reduce your workforce?

- No: 48%
- Yes, up to 10%: 5%
- Yes, up to 25%: 14%
- Yes, up to 50%: 19%
- Yes, up to 75%: 5%
- Yes, we shut down to the minimum: 5%

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

- It’s okay, we have extended our offering to other profitable work areas: 24%
- It’s okay, we’ll survive from our savings: 5%
- It will be hard, but we can keep our heads above water: 57%
- We’ll manage: 29%
- We’re struggling: 71%

(24 answers in total)
### Detailed results for India

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>India</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>30%</td>
<td>19%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### Format of exhibitions in the coming years

<table>
<thead>
<tr>
<th>Format of exhibitions</th>
<th>Yes, for sure</th>
<th>Most probably</th>
<th>Not sure</th>
<th>Not sure at all</th>
<th>Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covid-19 confirms the value of face to face events - sector bounces back quickly</td>
<td>62%</td>
<td>19%</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less international “physical” exhibitions, and overall less participants</td>
<td>19%</td>
<td>31%</td>
<td>31%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>A push towards “hybrid” events, more digital elements at events</td>
<td>10%</td>
<td>50%</td>
<td>30%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>“Virtual” events replacing “physical” events</td>
<td>5%</td>
<td>5%</td>
<td>32%</td>
<td>5%</td>
<td>53%</td>
</tr>
</tbody>
</table>

(24 answers in total)
### Digitisation: implementation in India and globally

<table>
<thead>
<tr>
<th>Action</th>
<th>India</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions</td>
<td>33%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital</td>
<td>17%</td>
<td>40%</td>
</tr>
<tr>
<td>processes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual</td>
<td>13%</td>
<td>37%</td>
</tr>
<tr>
<td>exhibitions / products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>4%</td>
<td>25%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>22%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(24 answers in total)
Detailed results for India

Number of fairs projected in 2021

- 40% Digital
- 33% Physical
- 28% Hybrid

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

- Less than 10%
- Between 10% and 30%
- Between 30% and 50%
- More than 50%

Digital:
- 0%
- 5%
- 5%
- 25%
- 5%

Physical:
- 0%
- 5%
- 15%
- 35%
- 0%

(24 answers in total)
Detailed results for Japan

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>15</td>
<td>69</td>
<td>23</td>
<td>15</td>
</tr>
<tr>
<td>Feb</td>
<td>15</td>
<td>69</td>
<td>54</td>
<td>15</td>
</tr>
<tr>
<td>Mar</td>
<td>15</td>
<td>62</td>
<td>23</td>
<td>8</td>
</tr>
<tr>
<td>Apr</td>
<td>23</td>
<td>31</td>
<td>62</td>
<td>8</td>
</tr>
<tr>
<td>May</td>
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<td>Jun</td>
<td>15</td>
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<tr>
<td>Aug</td>
<td>15</td>
<td>85</td>
<td>85</td>
<td>8</td>
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</table>

(13 answers in total)
When do you believe exhibitions will open again in your city?

<table>
<thead>
<tr>
<th>Category</th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
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<tbody>
<tr>
<td>not clear yet</td>
<td>3</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>later</td>
<td>29</td>
<td>28</td>
<td>8</td>
</tr>
<tr>
<td>2022-H1</td>
<td>31</td>
<td>42</td>
<td>54</td>
</tr>
<tr>
<td>2021-H2</td>
<td>31</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>already open</td>
<td>31</td>
<td>19</td>
<td>8</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 85%
- Readiness of exhibiting companies and visitors to participate again: 62%
- Mid-term visibility in terms of public policies, including travel restrictions: 62%
- Lift of current public policies that apply locally to exhibitions: 54%
- Financial incentive packages (leading to reduced costs for the exhibitors): 15%
- Relevant hygiene measures: 15%
- Other: 8%

(13 answers in total)
Detailed results for Japan

Revenue compared to 2019

Average for all companies

2021: 68%

2020: 40%

Operating Profits

<table>
<thead>
<tr>
<th>%</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>8</td>
<td>50</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>50</td>
<td>25</td>
</tr>
<tr>
<td>I don’t know</td>
<td>6</td>
<td>25</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>6</td>
<td>50</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Loss</td>
<td>6</td>
<td>17</td>
</tr>
</tbody>
</table>

(13 answers in total)
Detailed results for Japan

**Did your company benefit from public financial support?**

- **No**: 38%
- **Yes, for less than 10% of our 2019 overall costs**: 23%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 8%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 15%
- **Yes, for more than 50% of our 2019 overall costs**: 15%

**Have you had to reduce your workforce?**

- **No**: 46%
- **Yes, up to 10%**: 15%
- **Yes, up to 25%**: 8%
- **Yes, up to 50%**: 8%
- **Yes, up to 75%**: 0%
- **Yes, we shut down to the minimum**: 0%

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

- **No, thanks to savings**: 38%
- **No, thanks to governmental support/short time work allowance**: 15%
- **Yes, up to 10%**: 15%
- **Yes, up to 25%**: 15%
- **Yes, up to 50%**: 15%
- **Yes, up to 75%**: 0%
- **Yes, we shut down to the minimum**: 0%

- **It’s okay, we have extended our offering to other profitable work areas**: 46%
- **It’s okay, we’ll survive from our savings**: 31%
- **It will be hard, but we can keep our heads above water**: 38%
- **I’m afraid we’d have to close down**: 15%

(13 answers in total)
Detailed results for Japan

Most important business issues in the exhibition industry

<table>
<thead>
<tr>
<th>Issue</th>
<th>Japan</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>31%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Format of exhibitions in the coming years

1. Covid-19 confirms the value of face to face events - sector bounces back quickly
   - Yes, for sure: 31%
   - Most probably: 46%
   - Not sure: 23%
   - Not sure at all: 18%
   - Definitely not: 18%

2. Less international “physical” exhibitions, and overall less participants
   - Yes, for sure: 18%
   - Most probably: 64%
   - Not sure: 18%
   - Not sure at all: 18%
   - Definitely not: 18%

3. A push towards “hybrid” events, more digital elements at events
   - Yes, for sure: 31%
   - Most probably: 46%
   - Not sure: 15%
   - Not sure at all: 15%
   - Definitely not: 8%

4. “Virtual” events replacing “physical” events
   - Yes, for sure: 17%
   - Most probably: 17%
   - Not sure: 17%
   - Not sure at all: 50%
   - Definitely not: 17%
Digitisation: implementation in Japan and globally

- Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)
  - Japan: 54%
  - Global: 58%

- Launched digital products not directly related to existing exhibitions
  - Japan: 46%
  - Global: 40%

- Changed internal processes and workflows in our company into digital processes
  - Japan: 15%
  - Global: 37%

- Developed a digital / transformation strategy for individual exhibitions / products
  - Japan: 8%
  - Global: 25%

- Developed a digital / transformation strategy for the whole company
  - Japan: 8%
  - Global: 22%

- Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)
  - Japan: 8%
  - Global: 10%

- Other
  - Japan: 0%
  - Global: 6%
Detailed results for Japan

Number of fairs projected in 2021

- Digital: 6%
- Physical: 46%
- Hybrid: 48%

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

- Physical:
  - Less than 10%: 0%
  - Between 10% and 30%: 17%
  - Between 30% and 50%: 0%
  - More than 50%: 42%

- Digital:
  - Less than 10%: 0%
  - Between 10% and 30%: 0%
  - Between 30% and 50%: 0%
  - More than 50%: –
Detailed results for Malaysia

Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
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<td>61</td>
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<td>Mar</td>
<td>29</td>
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<td>Apr</td>
<td>29</td>
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<td>11</td>
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<td>May</td>
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<tr>
<td>Dec</td>
<td>31</td>
<td>31</td>
<td>31</td>
<td>31</td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Malaysia

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

- **Not clear yet**: 14 (31% Local exhibitions, 25% National exhibitions, 28% International exhibitions)
- **Later**: 3 (11% Local exhibitions, 33% National exhibitions, 25% International exhibitions)
- **2021-H2 already open**: 36 (25% Local exhibitions, 28% National exhibitions, 8% International exhibitions)
- **2022-H1 already open**: 17 (3% Local exhibitions, 8% National exhibitions, 8% International exhibitions)

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

- **Lift of current travel restrictions**: 82%
- **Financial incentive packages (leading to reduced costs for the exhibitors)**: 71%
- **Readiness of exhibiting companies and visitors to participate again**: 65%
- **Lift of current public policies that apply locally to exhibitions**: 65%
- **Relevant hygiene measures**: 53%
- **Mid-term visibility in terms of public policies, including travel restrictions**: 47%
- **Other**: 18% (17 answers in total)
Detailed results for Malaysia

Revenue compared to 2019

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>6%</td>
<td>0%</td>
</tr>
<tr>
<td>less than 25%</td>
<td>29%</td>
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<tr>
<td>25-49%</td>
<td>19%</td>
<td>6%</td>
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<tr>
<td>50-75%</td>
<td>6%</td>
<td>0%</td>
</tr>
<tr>
<td>more than 75%</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

Average for all companies

- 2020: 18%
- 2021: 33%

Operating Profits

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>I don’t know</td>
<td>25</td>
<td></td>
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<tr>
<td>Reduced by 11-50%</td>
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</tr>
<tr>
<td>Loss</td>
<td>44</td>
<td></td>
</tr>
</tbody>
</table>

(17 answers in total)
Detailed results for Malaysia

**Did your company benefit from public financial support?**

- **No**: 29%
- **Yes, for less than 10% of our 2019 overall costs**: 18%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 0%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 0%
- **Yes, for more than 50% of our 2019 overall costs**: 53%

**Have you had to reduce your workforce?**

- **No**: 47%
- **Yes, up to 10%**: 12%
- **Yes, up to 25%**: 12%
- **Yes, up to 50%**: 18%
- **Yes, up to 75%**: 6%
- **Yes, we shut down to the minimum**: 18%

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

- **No**: 71%
- **Yes**: 0%
- **We’ll manage**: 19%
- **We’re struggling**: 31%
- **It’s okay, we have extended our offering to other profitable work areas**: 38%
- **It’s okay, we’ll survive from our savings**: 13%
- **It will be hard, but we can keep our heads above water**: 12%
- **I’m afraid we’d have to close down**: 18%

(17 answers in total)
Detailed results for Malaysia

Most important business issues in the exhibition industry

- **Impact of Covid-19 pandemic on the business**: Malaysia 24%, Global 29%
- **State of the economy in home market**: Malaysia 20%, Global 19%
- **Global economic developments**: Malaysia 10%, Global 16%
- **Impact of digitisation**: Malaysia 12%, Global 11%
- **Internal management challenges**: Malaysia 10%, Global 7%
- **Competition from within the exhibition industry**: Malaysia 2%, Global 4%
- **Competition with other media**: Malaysia 8%, Global 7%
- **Regulatory / Stakeholders issues**: Malaysia 14%, Global 5%
- **Other**: Malaysia 0%, Global 1%

Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**: Yes, for sure 56%, Most probably 25%, Not sure 13%, Not at all 6%
- **Less international “physical” exhibitions, and overall less participants**: Yes, for sure 6%, Most probably 50%, Not sure 19%, Not at all 25%
- **A push towards “hybrid” events, more digital elements at events**: Yes, for sure 44%, Most probably 50%, Not sure 6%
- **“Virtual” events replacing “physical” events**: Yes, for sure 13%, Most probably 6%, Not sure 19%, Not at all 63%
### Detailed results for Malaysia

#### Digitisation: implementation in Malaysia and globally

<table>
<thead>
<tr>
<th>Category</th>
<th>Malaysia</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>76%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>29%</td>
<td>40%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>29%</td>
<td>37%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>
Detailed results for Malaysia

Number of fairs projected in 2021

- Digital: 43%
- Physical: 33%
- Hybrid: 24%

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

- Less than 10%: Digital 0% Physical 14% Hybrid 0%
- Between 10% and 30%: Digital 21% Physical 14% Hybrid 0%
- Between 30% and 50%: Digital 0% Physical 0% Hybrid 0%
- More than 50%: Digital 0% Physical 0% Hybrid 0%

(17 answers in total)
## Detailed results for Singapore

### Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
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<td>64%</td>
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<td>Feb</td>
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<td>Mar</td>
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<td>9%</td>
</tr>
<tr>
<td>May</td>
<td>36%</td>
<td>45%</td>
<td>27%</td>
<td>27%</td>
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<tr>
<td>Jun</td>
<td>27%</td>
<td>55%</td>
<td>27%</td>
<td>27%</td>
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</tr>
<tr>
<td>Dec</td>
<td>(11 answers in total)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(11 answers in total)
Detailed results for Singapore

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

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>7</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>later</td>
<td>20</td>
<td>35</td>
<td>79</td>
</tr>
<tr>
<td>2022-H1</td>
<td>60</td>
<td>55</td>
<td>14</td>
</tr>
<tr>
<td>already open</td>
<td>13</td>
<td>5</td>
<td>14</td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 100%
- Lift of current public policies that apply locally to exhibitions: 64%
- Readiness of exhibiting companies and visitors to participate again: 55%
- Mid-term visibility in terms of public policies, including travel restrictions: 36%
- Financial incentive packages (leading to reduced costs for the exhibitors): 36%
- Relevant hygiene measures: 18%
- Other: 0%

(11 answers in total)
Detailed results for Singapore

Revenue compared to 2019

- Average for all companies:
  - 2020: 26%
  - 2021: 19%

Operating Profits

- Increase of more than 10%: 9%
- Stable (between -10% and +10%): 9%
- I don’t know: 9%
- Reduced by 11-50%: 18%
- Reduced by more than 50%: 7%
- Loss: 13%

(11 answers in total)
### Detailed results for Singapore

#### Did your company benefit from public financial support?

- **No**: 18%
- **Yes, for less than 10% of our 2019 overall costs**: 27%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 9%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 0%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **No, thanks to savings**: 9%
- **No, thanks to governmental support/ short time work allowance**: 0%
- **Yes, up to 10%**: 9%
- **Yes, up to 25%**: 9%
- **Yes, up to 50%**: 9%
- **Yes, up to 75%**: 9%
- **Yes, we shut down to the minimum**: 9%

#### Have you had to reduce your workforce?

- **NO**: 27%
- **Yes 55%**: 27%
- **YES 45%**: 18%

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

- **WE’LL MANAGE 36%**: 18%
- **WE’RE STRUGGLING 64%**: 18%

---

- **No**: 18%
- **Yes, for less than 10% of our 2019 overall costs**: 27%
- **Yes, for between 10% and 25% of our 2019 overall costs**: 9%
- **Yes, for between 25% and 50% of our 2019 overall costs**: 0%
- **Yes, for more than 50% of our 2019 overall costs**: 0%
- **No, thanks to savings**: 9%
- **No, thanks to governmental support/ short time work allowance**: 0%
- **Yes, up to 10%**: 9%
- **Yes, up to 25%**: 9%
- **Yes, up to 50%**: 9%
- **Yes, up to 75%**: 9%
- **Yes, we shut down to the minimum**: 9%

- **NO**: 27%
- **Yes 55%**: 27%
- **YES 45%**: 18%

- **WE’LL MANAGE 36%**: 18%
- **WE’RE STRUGGLING 64%**: 18%
Detailed results for Singapore

Most important business issues in the exhibition industry

- **Impact of Covid-19 pandemic on the business**: 24% Singapore, 29% Global
- **State of the economy in home market**: 14% Singapore, 19% Global
- **Global economic developments**: 28% Singapore, 16% Global
- **Impact of digitisation**: 3% Singapore, 11% Global
- **Internal management challenges**: 7% Singapore, 7% Global
- **Competition from within the exhibition industry**: 0% Singapore, 4% Global
- **Competition with other media**: 10% Singapore, 7% Global
- **Regulatory / Stakeholders issues**: 10% Singapore, 5% Global
- **Other**: 28% Singapore, 3% Global

Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**: 18% Singapore, 73% Global, 9%
- **Less international “physical” exhibitions, and overall less participants**: 9% Singapore, 45% Global, 36%, 9%
- **A push towards “hybrid” events, more digital elements at events**: 64% Singapore, 27% Global, 9%
- **“Virtual” events replacing “physical” events**: 10% Singapore, 10%, 30%, 50%
## Digitisation: implementation in Singapore and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Singapore</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>55%</td>
<td>40%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(11 answers in total)
Detailed results for Singapore

Number of fairs projected in 2021

- 51% Digital
- 42% Physical
- 6% Hybrid

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

<table>
<thead>
<tr>
<th>Digital</th>
<th>Physical</th>
<th>Hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10%</td>
<td>9%</td>
<td>0%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Between 30% and 50%</td>
<td>18%</td>
<td>0%</td>
</tr>
<tr>
<td>More than 50%</td>
<td>36%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10%</td>
</tr>
<tr>
<td>Between 10% and 30%</td>
</tr>
<tr>
<td>Between 30% and 50%</td>
</tr>
<tr>
<td>More than 50%</td>
</tr>
</tbody>
</table>
### Situation of industry operations in 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>I Don't Know</th>
<th>No Activity</th>
<th>Reduced</th>
<th>Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>20%</td>
<td>70%</td>
<td>33%</td>
<td>10%</td>
</tr>
<tr>
<td>Feb</td>
<td>20%</td>
<td>70%</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>Mar</td>
<td>67%</td>
<td>30%</td>
<td>45%</td>
<td>10%</td>
</tr>
<tr>
<td>Apr</td>
<td>70%</td>
<td>60%</td>
<td>40%</td>
<td>10%</td>
</tr>
<tr>
<td>May</td>
<td>55%</td>
<td>60%</td>
<td>56%</td>
<td>10%</td>
</tr>
<tr>
<td>Jun</td>
<td>50%</td>
<td>56%</td>
<td>56%</td>
<td>10%</td>
</tr>
<tr>
<td>Jul</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>10%</td>
</tr>
<tr>
<td>Aug</td>
<td>50%</td>
<td>56%</td>
<td>44%</td>
<td>10%</td>
</tr>
<tr>
<td>Sep</td>
<td>50%</td>
<td>56%</td>
<td>44%</td>
<td>10%</td>
</tr>
<tr>
<td>Oct</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>10%</td>
</tr>
<tr>
<td>Nov</td>
<td>30%</td>
<td>70%</td>
<td>70%</td>
<td>10%</td>
</tr>
<tr>
<td>Dec</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: The percentages may not add up to 100% due to rounding.*

(11 answers in total)
Detailed results for South Korea

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

- Not clear yet: 11%, 6%, 21%, 47%
- Later: 10%, 17%, 24%, 48%
- 2022-H1: 6%, 56%, 21%, 19%
- 2021-H2: 17%, 6%, 14%, 10%
- Already open: 11%, 6%, 6%, 6%

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

- Lift of current travel restrictions: 91%
- Lift of current public policies that apply locally to exhibitions: 55%
- Mid-term visibility in terms of public policies, including travel restrictions: 45%
- Readiness of exhibiting companies and visitors to participate again: 27%
- Financial incentive packages (leading to reduced costs for the exhibitors): 9%
- Relevant hygiene measures: 9%
- Other: 0%

(11 answers in total)
Detailed results for South Korea

Revenue compared to 2019

Average for all companies

2020: 30%

2021: 67%

Operating Profits

<table>
<thead>
<tr>
<th>Percentage</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of more than 10%</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>Stable (between -10% and +10%)</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>I don’t know</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Reduced by 11-50%</td>
<td>60</td>
<td>40</td>
</tr>
<tr>
<td>Reduced by more than 50%</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Loss</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

(11 answers in total)
Did your company benefit from public financial support?

- No: 64%
- Yes: 36%

Have you had to reduce your workforce?

- No: 82%
- Yes: 18%

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

- We’ll manage: 36%
- We’re struggling: 64%

**Detailed results for South Korea**

- Did your company benefit from public financial support?
  - No: 64%
  - Yes: 36%

- Have you had to reduce your workforce?
  - No: 82%
  - Yes: 18%

- If there is no business for the next 6 months, which best applies?
  - We’ll manage: 36%
  - We’re struggling: 64%
Detailed results for South Korea

Most important business issues in the exhibition industry

- Impact of Covid-19 pandemic on the business: 38% (South Korea), 29% (Global)
- State of the economy in home market: 19% (South Korea), 4% (Global)
- Global economic developments: 16% (South Korea), 8% (Global)
- Impact of digitisation: 11% (South Korea), 8% (Global)
- Internal management challenges: 7% (South Korea), 8% (Global)
- Competition from within the exhibition industry: 8% (South Korea), 7% (Global)
- Competition with other media: 8% (South Korea), 5% (Global)
- Regulatory / Stakeholders issues: 0% (South Korea), 1% (Global)
- Other: 67% (South Korea), 17% (Global)

Format of exhibitions in the coming years

- Covid-19 confirms the value of face to face events - sector bounces back quickly: 33% (South Korea), 33% (Global)
- Less international “physical” exhibitions, and overall less participants: 67% (South Korea), 17% (Global)
- A push towards “hybrid” events, more digital elements at events: 22% (South Korea), 33% (Global)
- “Virtual” events replacing “physical” events: 29% (South Korea), 57% (Global)

(11 answers in total)
## Digitisation: implementation in South Korea and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>South Korea</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>100%</td>
<td>58%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Launched digital products not directly related to existing exhibitions</td>
<td>45%</td>
<td>37%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>36%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

(11 answers in total)
Detailed results for South Korea

Number of fairs projected in 2021

- Digital: 2%
- Physical: 60%
- Hybrid: 38%

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

- Less than 10%: Digital - 0%, Physical - 0%, Hybrid - 0%
- Between 10% and 30%: Digital - 13%, Physical - 0%, Hybrid - 0%
- Between 30% and 50%: Digital - 0%, Physical - 0%, Hybrid - 0%
- More than 50%: Digital - 0%, Physical - 25%, Hybrid - 13%
Detailed results for Thailand

Situation of industry operations in 2021

- I Don't Know: 18%
- No Activity: 55%
- Reduced Activity: 27%
- Normal Activity: 36%

Monthly distribution:
- January: 18%
- February: 9%
- March: 18%
- April: 45%
- May: 55%
- June: 45%
- July: 20%
- August: 80%
- September: 70%
- October: 50%
- November: 40%
- December: 40%
When do you believe exhibitions will open again in your city?

<table>
<thead>
<tr>
<th></th>
<th>Local exhibitions</th>
<th>National exhibitions</th>
<th>International exhibitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not clear yet</td>
<td>13</td>
<td>35</td>
<td>14</td>
</tr>
<tr>
<td>later</td>
<td>50</td>
<td>65</td>
<td>64</td>
</tr>
<tr>
<td>2022-H1</td>
<td>65</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>already open</td>
<td>38</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- Lift of current travel restrictions: 100%
- Lift of current public policies that apply locally to exhibitions: 82%
- Mid-term visibility in terms of public policies, including travel restrictions: 55%
- Relevant hygiene measures: 45%
- Readiness of exhibiting companies and visitors to participate again: 27%
- Financial incentive packages (leading to reduced costs for the exhibitors): 27%
- Other: 9%

(11 answers in total)
Detailed results for Thailand

Revenue compared to 2019

Average for all companies

2020: 34%
2021: 45%

Operating Profits

Increase of more than 10%

Stable (between -10% and +10%)

I don’t know

Reduced by 11-50%

Reduced by more than 50%

Loss

2019
2020

(11 answers in total)
**Detailed results for Thailand**

### Did your company benefit from public financial support?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>55%</td>
</tr>
<tr>
<td>Yes, for less than 10% of our 2019 overall costs</td>
<td>27%</td>
</tr>
<tr>
<td>Yes, for between 10% and 25% of our 2019 overall costs</td>
<td>9%</td>
</tr>
<tr>
<td>Yes, for between 25% and 50% of our 2019 overall costs</td>
<td>9%</td>
</tr>
<tr>
<td>Yes, for more than 50% of our 2019 overall costs</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Have you had to reduce your workforce?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>20%</td>
</tr>
<tr>
<td>Yes, thanks to savings</td>
<td>20%</td>
</tr>
<tr>
<td>Yes, thanks to governmental support/ short time work allowance</td>
<td>30%</td>
</tr>
<tr>
<td>Yes, up to 10%</td>
<td>40%</td>
</tr>
<tr>
<td>Yes, up to 25%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, up to 50%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, up to 75%</td>
<td>0%</td>
</tr>
<tr>
<td>Yes, we shut down to the minimum</td>
<td>0%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>20%</td>
</tr>
<tr>
<td>Yes</td>
<td>80%</td>
</tr>
<tr>
<td>It's okay, we have extended our offering to other profitable work areas</td>
<td>40%</td>
</tr>
<tr>
<td>It's okay, we'll survive from our savings</td>
<td>20%</td>
</tr>
<tr>
<td>It will be hard, but we can keep our heads above water</td>
<td>20%</td>
</tr>
<tr>
<td>I'm afraid we'd have to close down</td>
<td>10%</td>
</tr>
</tbody>
</table>

(11 answers in total)
### Detailed results for Thailand

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>Thailand</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of Covid-19 pandemic on the business</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>State of the economy in home market</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Global economic developments</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Impact of digitisation</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>Internal management challenges</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Competition from within the exhibition industry</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Competition with other media</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Regulatory / Stakeholders issues</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### Format of exhibitions in the coming years

- **Covid-19 confirms the value of face to face events - sector bounces back quickly**
  - Yes, for sure: 30%
  - Most probably: 50%
  - Not sure: 20%

- **Less international “physical” exhibitions, and overall less participants**
  - Yes, for sure: 10%
  - Most probably: 50%
  - Not sure: 10%

- **A push towards “hybrid” events, more digital elements at events**
  - Yes, for sure: 10%
  - Most probably: 80%

- **“Virtual” events replacing “physical” events**
  - Yes, for sure: 10%
  - Most probably: 10%
  - Not sure: 20%

(11 answers in total)
### Digitisation: implementation in Thailand and globally

<table>
<thead>
<tr>
<th>Activity</th>
<th>Thailand</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added digital services / products around our existing exhibitions (like apps, digital advertising, and digital signage)</td>
<td>82%</td>
<td>58%</td>
</tr>
<tr>
<td>Changed internal processes and workflows in our company into digital processes</td>
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<td>37%</td>
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<tr>
<td>Developed a digital / transformation strategy for individual exhibitions / products</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Developed a digital / transformation strategy for the whole company</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Created a designated function in the upper/top management (like a CDO, Head of Digital, etc.)</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Detailed results for Thailand

Number of fairs projected in 2021

- 45% Physical
- 33% Digital
- 22% Hybrid

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

### Physical
- Less than 10%
  - 0%
- Between 10% and 30%
  - 20%
- Between 30% and 50%
  - 10%
- More than 50%
  - 0%

### Digital
- Less than 10%
  - 0%
- Between 10% and 30%
  - 0%
- Between 30% and 50%
  - 0%
- More than 50%
  - 0%

(11 answers in total)
Conclusion

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

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

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

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

When asked what element would most help towards the “bounce-back” of exhibitions, the majority of companies rank “lifting of current travel restrictions” (71% of answers), “readiness of exhibiting companies and visitors to participate again” (58% of answers), and “lifting of current public policies that apply locally to exhibitions” (55% of answers) as the key drivers.

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

**Overall:**

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

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

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

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

- 78% of companies (up from 64% six months ago and 57% 12 months ago) of respondents are confident that “COVID-19 confirms the value of face-to-face events” anticipating that the sector will bounce back quickly (39% “Yes, for sure” and 39% “Most probably”), while 20% are “Not sure”.

- 46% - compared to 63% 6 months ago and 57% 12 months ago - believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants” (6% “Yes, for sure” and 39% “Most probably”), and 44% are “Not sure”.

- 76% of companies – 80% 6 months ago and 82% 12 months ago - consider that there is “A push towards hybrid events, more digital elements at events” (26% “Yes, for sure” and 50% “Most probably”).

- 11% - down from 14% 6 months ago and 17% 12 months ago - agrees with the statement that “Virtual events replacing physical events” (3% “Yes, for sure” and 8% “Most probably”), 36% are “Not sure” and 53% are stating “definitely not”.

**THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION! THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN DECEMBER 2021 – PLEASE PARTICIPATE!**
Appendix: Number of survey replies per country
Total = 474 (in 64 countries/regions)

<table>
<thead>
<tr>
<th>Region</th>
<th>Count</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>42</td>
<td>2</td>
</tr>
<tr>
<td>Mexico</td>
<td>21</td>
<td>1</td>
</tr>
<tr>
<td>USA</td>
<td>18</td>
<td>1</td>
</tr>
<tr>
<td>Central &amp; South America</td>
<td>82</td>
<td>20</td>
</tr>
<tr>
<td>Argentina</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Bolivia</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Brazil</td>
<td>17</td>
<td>2</td>
</tr>
<tr>
<td>Chile</td>
<td>16</td>
<td>4</td>
</tr>
<tr>
<td>Colombia</td>
<td>21</td>
<td>1</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Cuba</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Ecuador</td>
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<td>Guatemala</td>
<td>4</td>
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<td>Panama</td>
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<td>Africa</td>
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<td>Greece</td>
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