

UFI Global Exhibition Barometer

25th Edition

Report based on the results of a survey concluded in July 2020



Global



Southern Africa



Macau



United Kingdom



Russia



Spain



Singapore



Central & South America



US



South Korea



Thailand



Mexico



Brazil



Indonesia



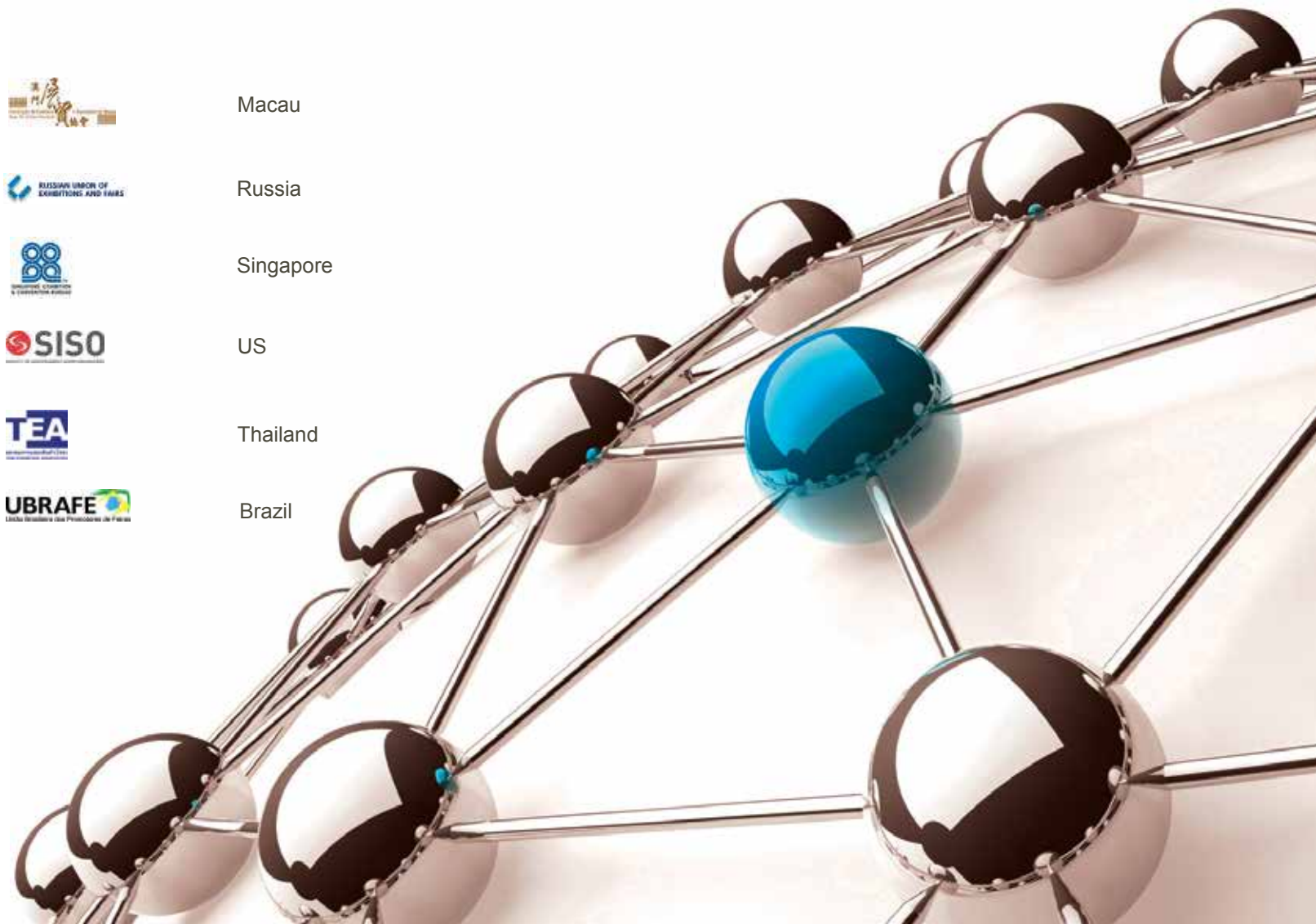
Australia



India



Japan



Global Reports



Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

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

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

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

Regional Reports



Regular market overviews on UFI's chapter regions.

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

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

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

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

Topical Reports



Focused reports on challenges and developments within the exhibition industry.

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

Best Practices Compendiums – Case studies of successful industry developments.

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

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Welcome to the 25th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, conducted in June 2020. It represents up-to-date information on the development and outlook of the global exhibition industry as well as on 25 specific markets.

UFI launched the barometer on the back of a global crisis – the 2008 Financial Crisis. Rather ironically, this jubilee edition is tracking the impact of another global crisis: the COVID-19 pandemic.

To cover this and to provide the most relevant data possible, we have added a series of questions directly related to the impact of this crisis, as well as projections for the future.

With 459 participating companies, the reach of this barometer is unprecedented. It enables us to share specific, vastly expanded insights into 20 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, AFIDA (Asociación Internacional de Ferias de América) in Central and South America, AKEI (The Association of Korean Exhibition Industry) in South Korea, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry

Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs), SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

Important remarks

The number of replies to the current survey (459 from 62 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 20 markets where a significant number of answers were obtained.

Due to decimal rounding, the percentage values indicated in some charts may not exactly sum up to 100%.

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

The 25th Barometer surveyed participants' monthly operations, to qualify their level of activity as "normal", "reduced" or "no activity". Companies were also asked for their predictions, as of June 2020, about when they believed exhibitions would open again in their city.

The following chart presents the results, globally first, and then for each region with comparison to the World.

Globally, 85% of companies declared their overall level of activity was "normal" in January. This quickly dropped to 15% in March, to reach between 5% and 6% in April, May and June. For both April and May, 73% of companies worldwide declared "no activity".

With a majority of companies expecting "local" and "national" exhibitions to open again during the second half of 2020, the level of activity is expected to slowly increase, and two companies out of three project at least a "reduced" level of activity in the last quarter of 2020.

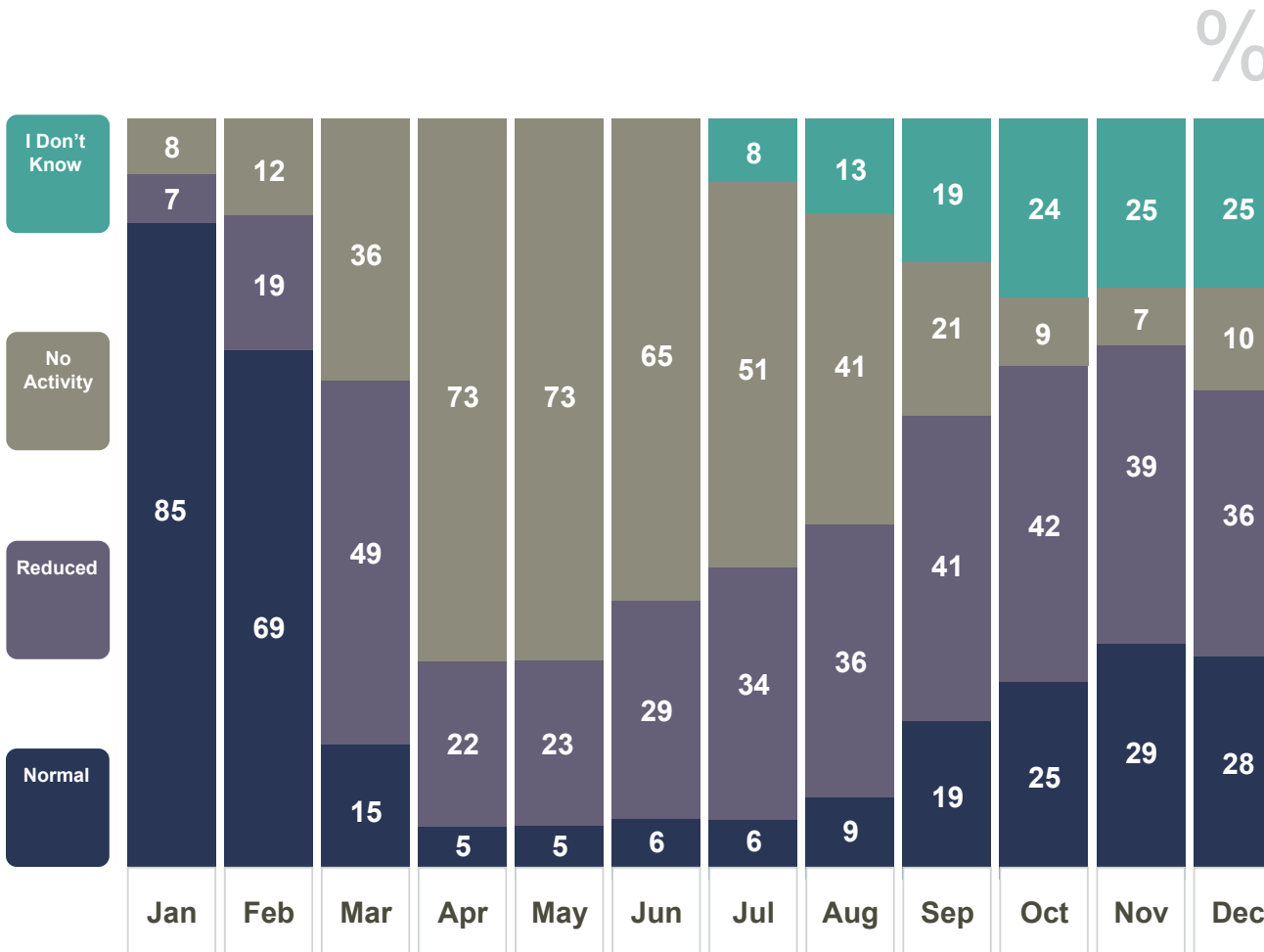
Finally, in all regions, a majority of companies believe that "international" exhibitions won't open until 2021.

For each region, the level of operations follows these general trends. However, a few differences are noticed:

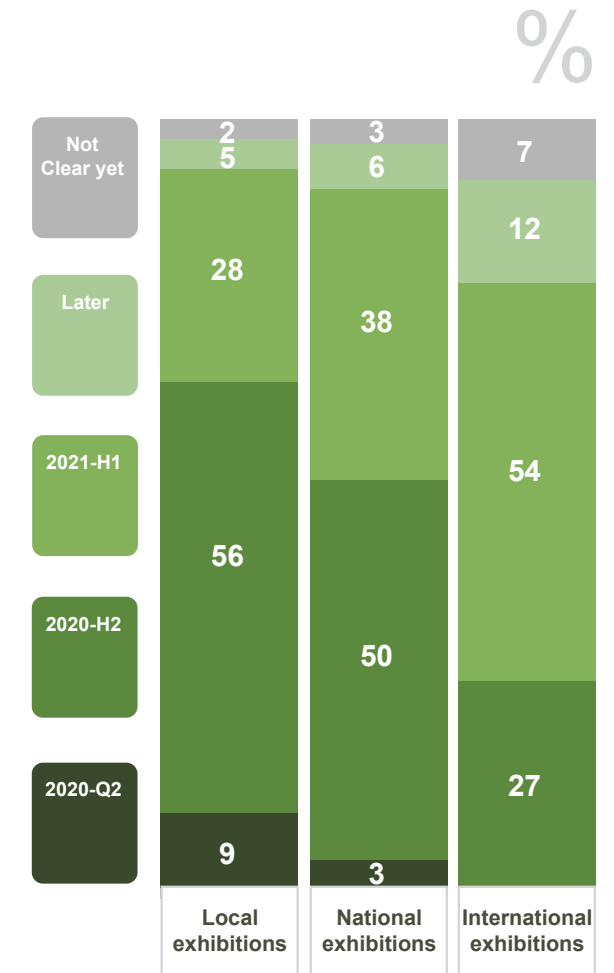
- The Asia-Pacific region first faced a drop in activity: only 73% of companies declared a "normal" level in January compared to a minimum of 85% in all other regions; in February, the level had already dropped to 45% in the Asia-Pacific region.
- The Middle East & Africa, and to some extent Central and South America, appear less confident as to the return to a "normal" level of activity than in other regions. In both those regions, a majority of companies expect that "national" exhibitions won't open until 2021.



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



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



The 25th Barometer surveyed the evolution of participants' gross turnover for the first half of 2020, and their overall expectation for all of 2020, compared to their turnover during the same period in the previous year (regardless of possible biennial effects). The survey also questioned the evolution of operating profits for 2019 and planned for 2020 compared to the previous year.

The following charts present:

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

On average globally, revenues for the first half of 2020 represented only 33% of the revenues produced for same period last year. Looking at 2020 as a whole, it is currently expected that the revenues will represent only 39% of those of 2019.

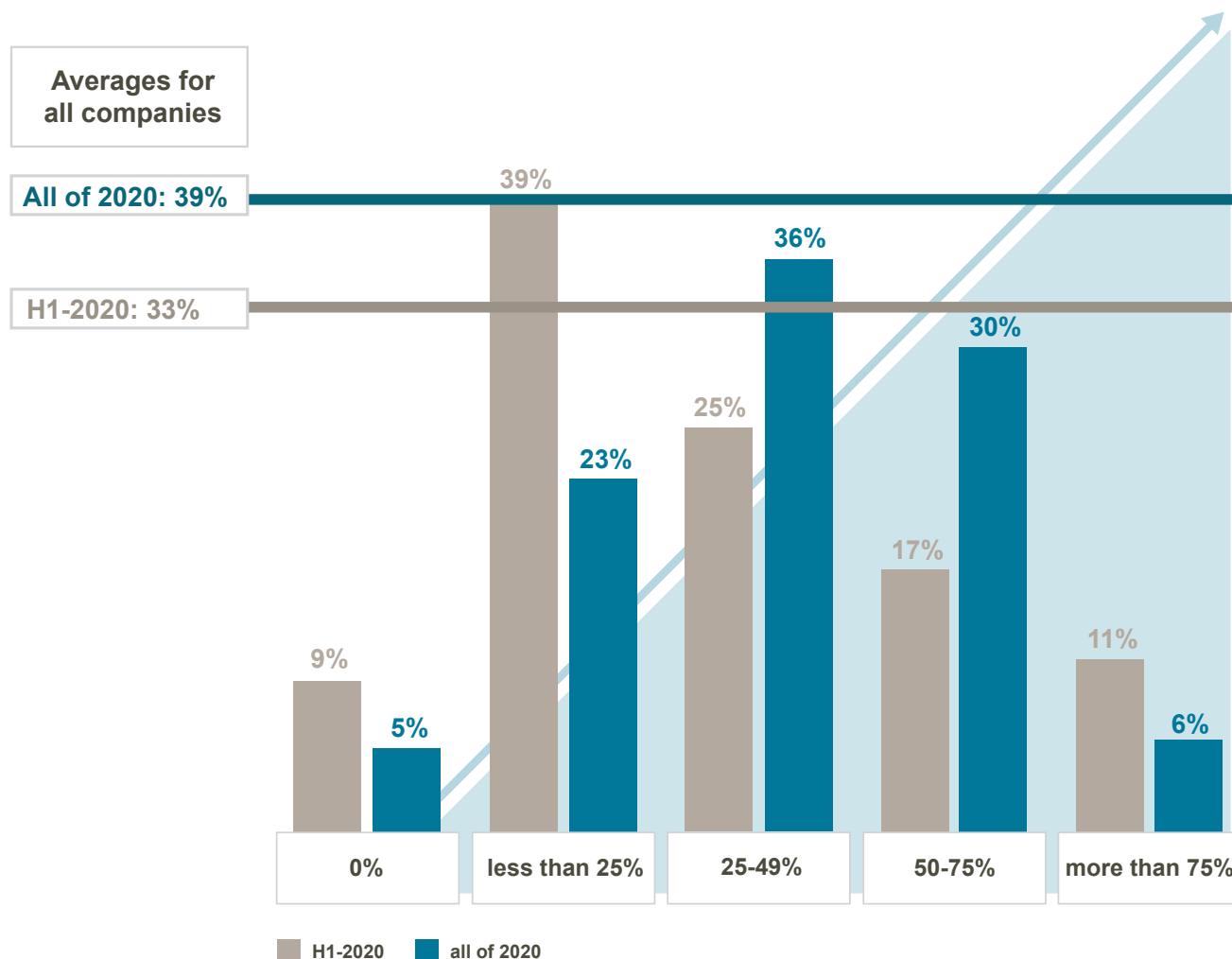
In terms of profits, a strong level of performance was reached in 2019, with 45% of companies declaring an increase of more than 10% for 2019 when compared to 2018. The sharp drop in revenues that occurred in 2020 has led to a loss for 39% of companies, and only 7% of companies currently expect a stable or increase of their profit for 2020.

Regional results indicate that:

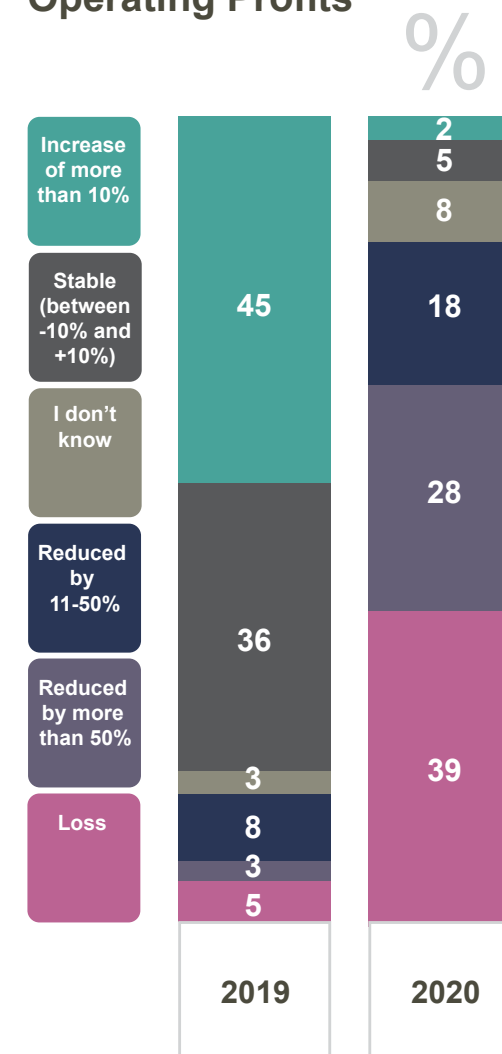
- The revenue drop for all of 2020 is expected to be slightly higher in the Middle East & Africa and Central and South America (respectively only 31% and 33% of last year's revenue) than in the Asia-Pacific region (39%) or Europe and North America (44% for both)
- In terms of profits, the percentage of companies expecting a loss for 2020 varies from 34% in the Asia-Pacific region to 48% in the Middle East & Africa, and around four companies out of ten in all other regions.



Revenue compared to last year (2019)



Operating Profits



Cost reductions - Public Financial Support - Investments

The 25th Barometer surveyed the impact of the Covid-19 crisis on costs, public financial support if any, and investments, including those expected on the short-term to comply to Covid-19 (likely) protocols and guidelines.

Overall, 87% of companies applied cost reductions, and of more than 50% of overall costs for 17% of them. A majority of companies did not get any public financial support. At the same time, 44% did, and for a majority of those, it related to less than 10% of their costs.

The short-term investments required to comply with Covid-19 (likely) protocols and guidelines appears unknown at this state for one company out of three in general. For one company out of four, they will represent more than 10% of their overall costs.

Generally speaking, all 2020 investments are stopped for 44% of companies throughout the world. They will decrease for another 32% of companies.

All those proportions apply to most regions, with only a few significant differences:

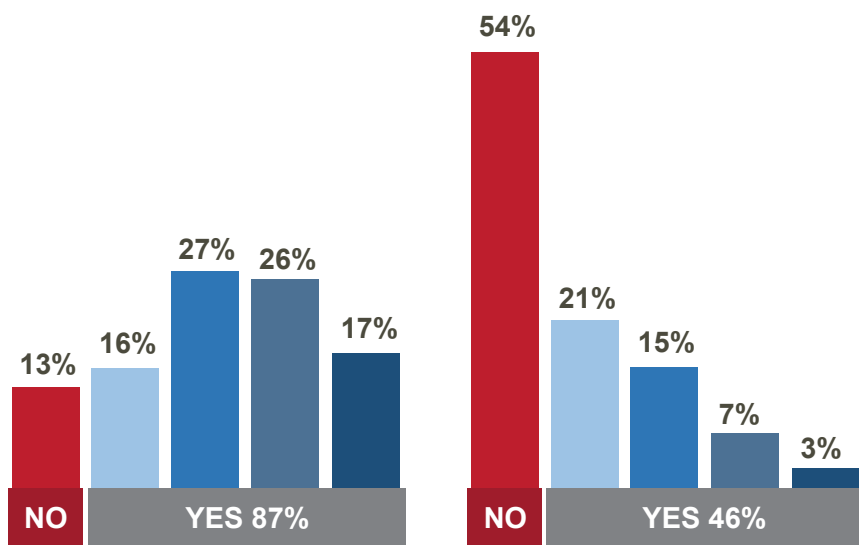
- Financial public support is less frequent in the Middle East & Africa and in North America, where only respectively 31% and 38% benefitted from some.
- 60% of companies have stopped all their investments in Central and South America.

Cost Reductions - Public Financial Support - Investments - World



Did your company implement cost reductions?

Did your company benefit from public financial support?

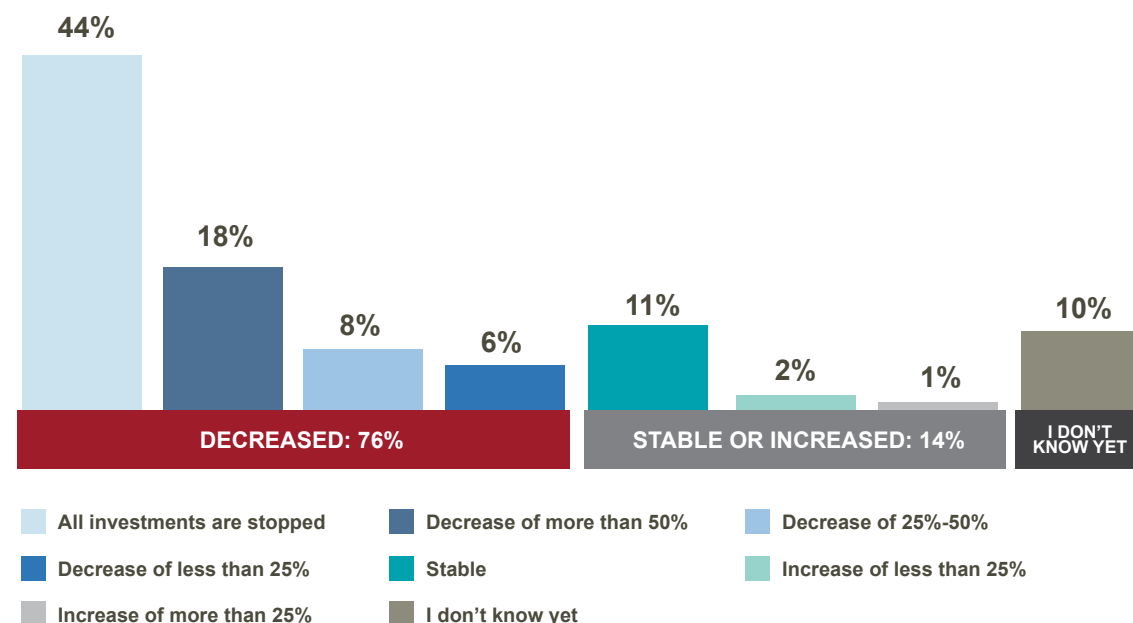


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?



The 25th Barometer surveyed the impact of the Covid-19 crisis on programmes related to three key areas: digitalisation, diversity, and sustainability.

In each area, companies were first asked how they rate the transition of the exhibition industry, the impact of the Covid-19 crisis on those programs investments, and also, to what degree they would welcome some public investments in these specific areas.

Results indicate that, on average, companies consider that the transition of the exhibition industry is more than halfway for digitalisation (2.9 on a scale of 1-5), diversity (2.9) and sustainability (2.8). It can be noticed that those ratings do not vary much from one region to another.

Out of the three areas, digitalisation programmes are those where Covid-19 had the most impact (“strong” or “significant” for 60% of companies), and globally, 50% of companies have increased their investments in that area. In comparison, investments have decreased or been stopped for 55% of companies in programmes related to diversity, and 54% in those related to sustainability.

Around one company out of two indicates that public investments are “essential and necessary for most of the investments” required towards digitalisation (50% of companies) and sustainability (46%), and “necessary for a significant share” towards diversity (49%).

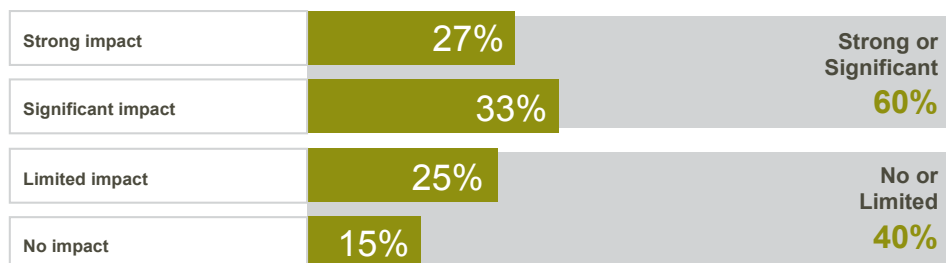


How would you rate the transition of the exhibition industry?

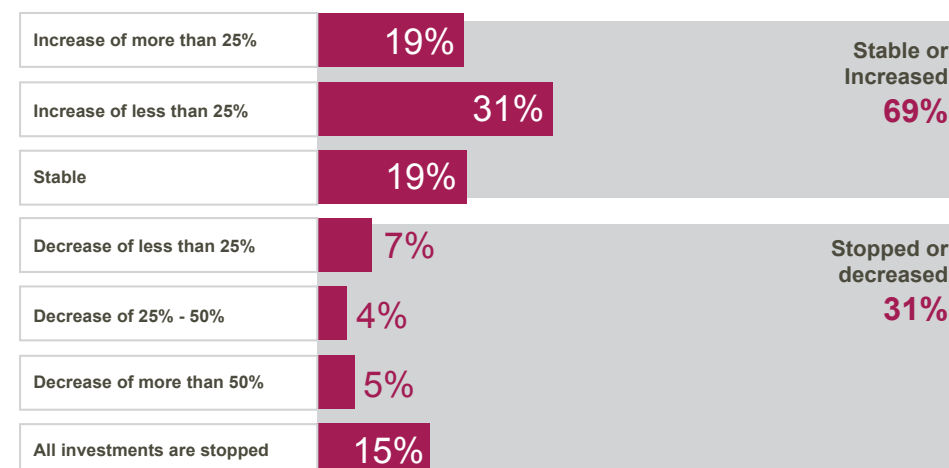
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



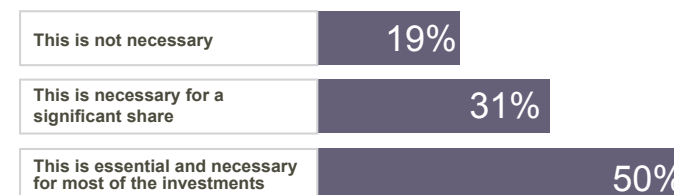
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?

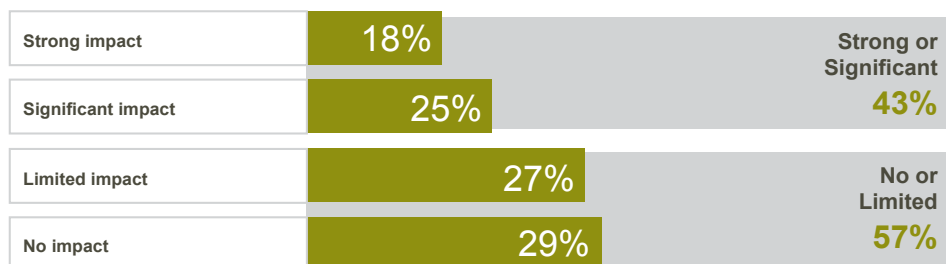


How would you rate the transition of the exhibition industry?

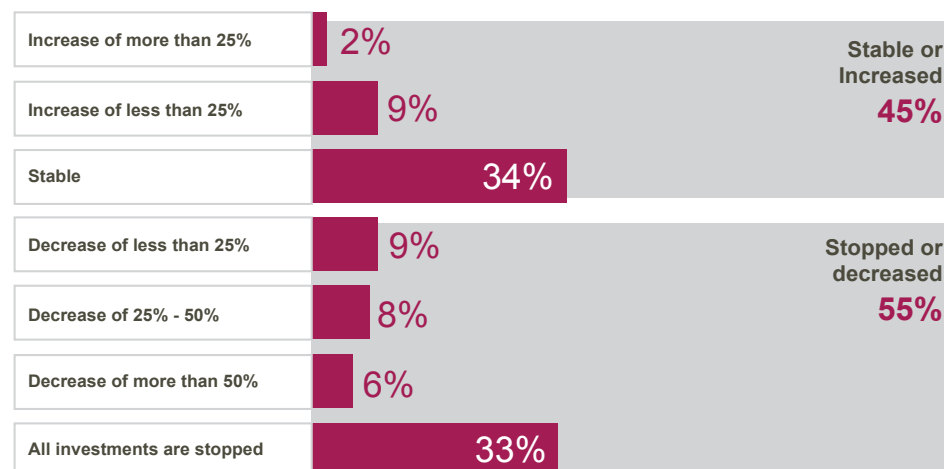
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



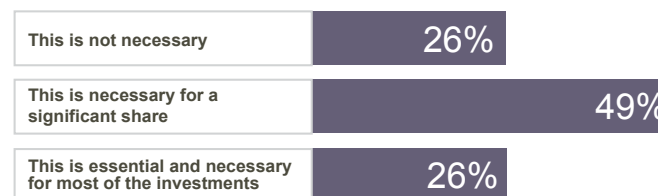
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?

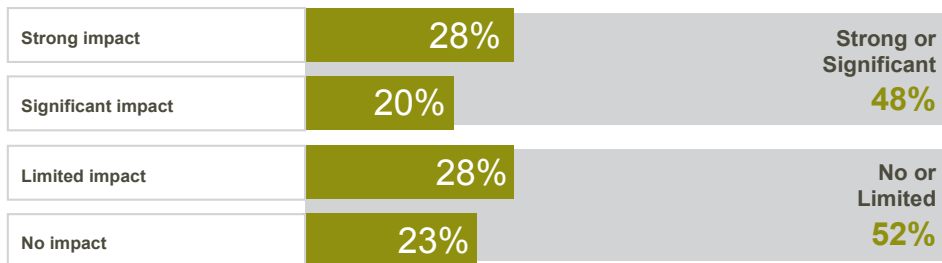


How would you rate the transition of the exhibition industry?

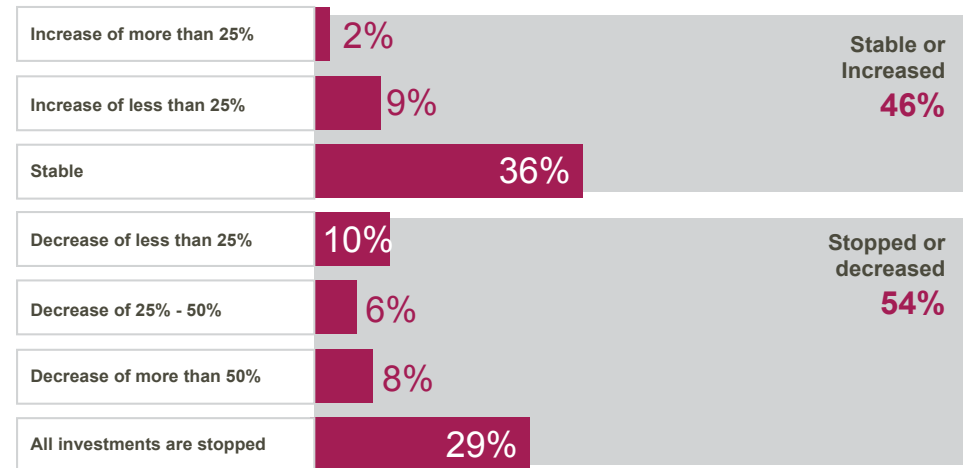
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



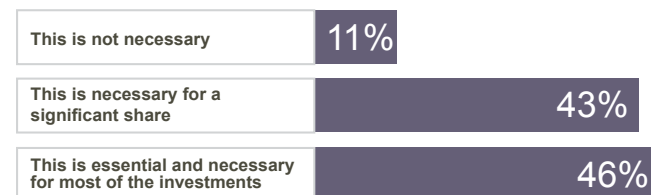
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?



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

“Impact of Covid-19 pandemic on the business” is considered as the most important business issue (27% of combined answers). Also, for the first time, “Impact of digitalisation” (10% of answers) joins the “State of the economy in home market” (21%) and “Global economic developments” (18%) in the top priorities. “Internal challenges” and “Competition from within the industry”, always in the top four most important business issues, are ranked below for this survey, with respectively 7% (15% six months ago) and 5% of answers (20% six months ago).

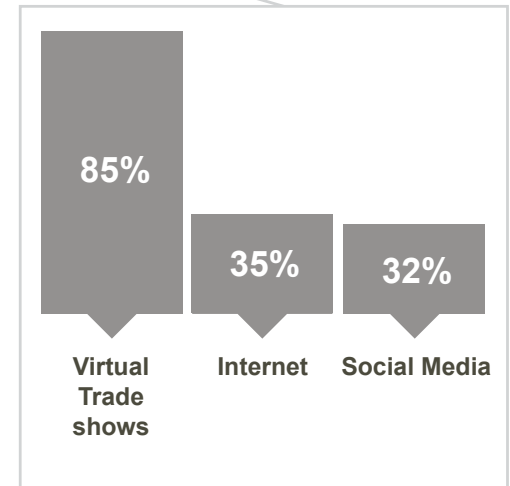
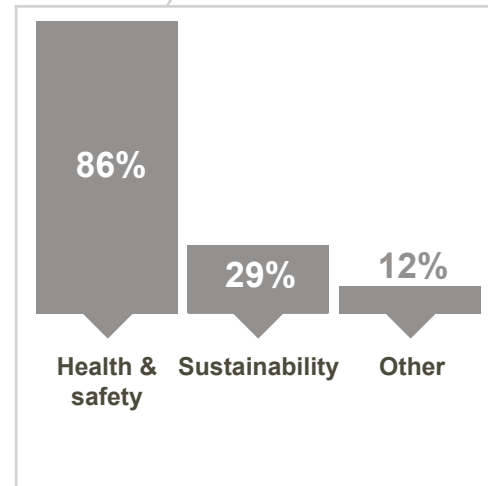
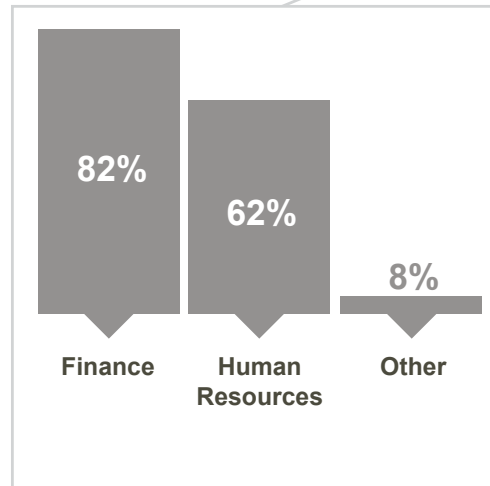
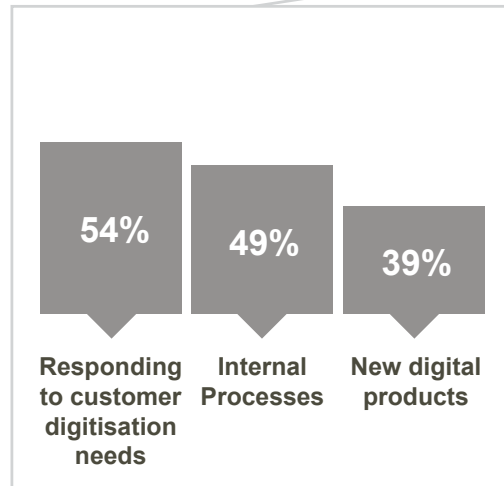
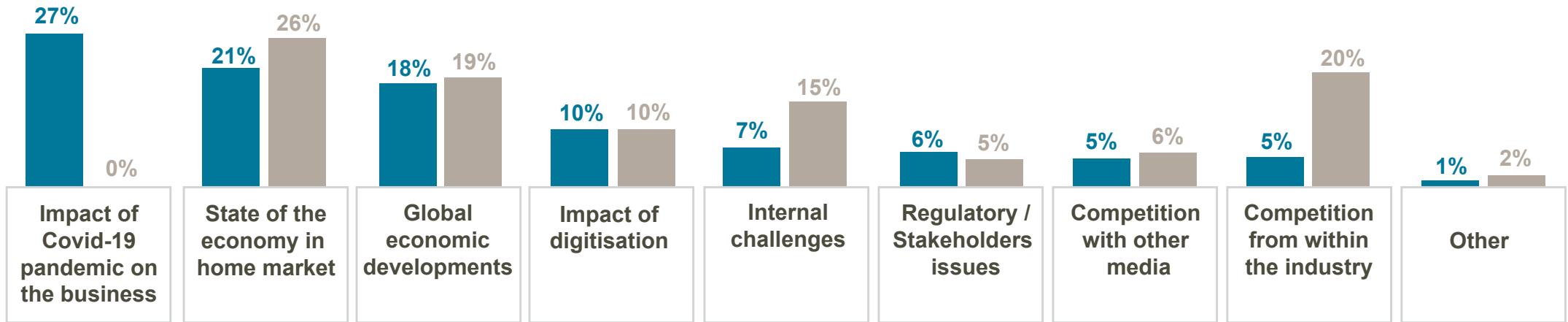
“Regulatory / Stakeholders issues” and “Competition with other media” keep similar levels to the last survey.

The following pages show the consolidated results, for the world and by region. It can be noticed that “State of the economy in home market” is ranked as the top issue in Central and South America, and the Middle East & Africa.

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

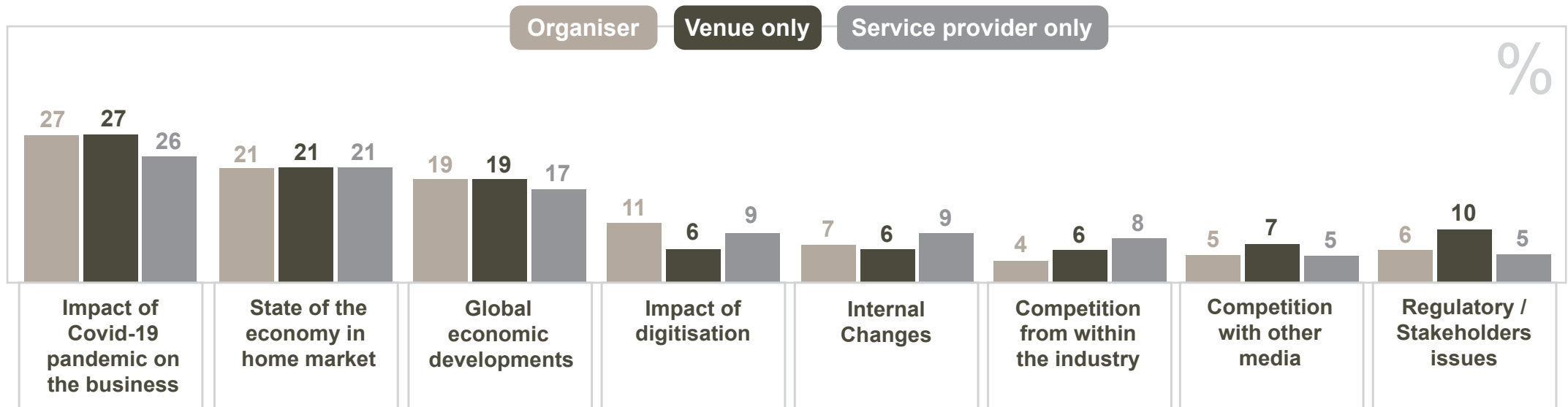
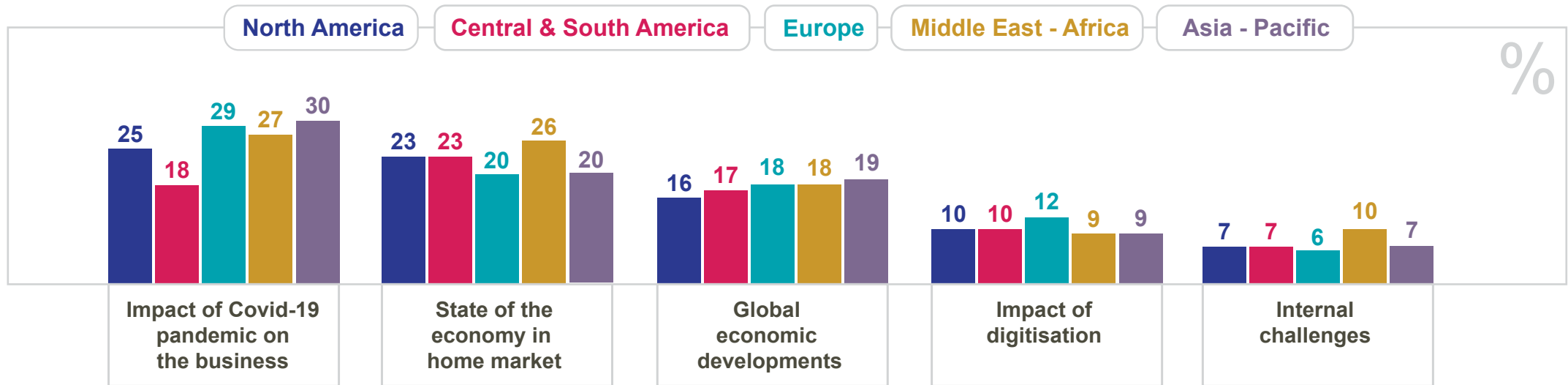
Results from current survey – July 2020

Results from last survey - January 2020



(multiple answers possible)

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



Finally, the 25th Barometer surveyed on possible driving trends for the format of exhibitions in the coming year, by asking companies to assess four different statements.

Global results indicate that:

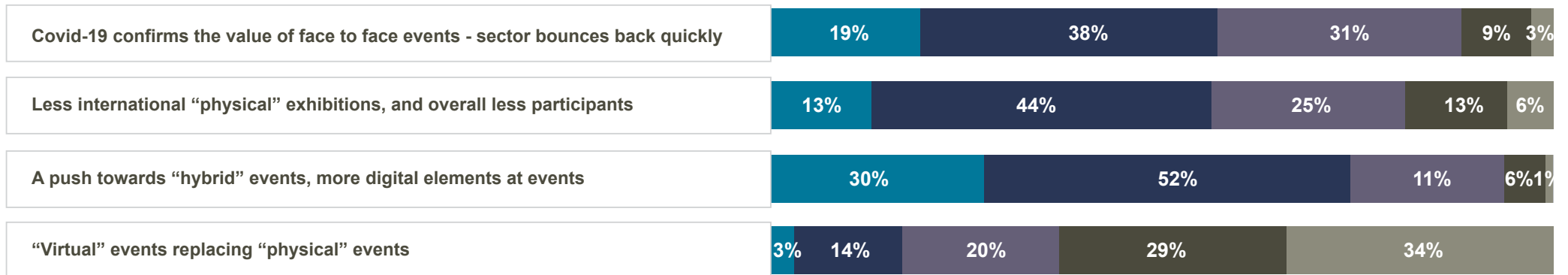
- 57% are confident that “COVID-19 confirms the value of face-to-face events” anticipating that the sector will bounce back quickly (19% “Yes, for sure” and 38% “Most probably”), but 31% are “Not sure”.
- 56% believe that there will be “Less international ‘physical’ exhibitions, and overall, less participants” (13% “Yes, for sure” and 44% “Most probably”), and 25% are “Not sure”.
- 82% of companies consider that there is “A push towards hybrid events, more digital elements at events” (30% “Yes, for sure” and 52% “Most probably”).
- A minority of 17% agrees with “Virtual events replacing physical events” (3% “Yes, for sure” and 14% “Most probably”), and 20% are “Not sure”.

There is one significant regional differentiation: “Virtual events replacing physical events”, with stronger and opposing views – from Europe, where 80% of companies disagree, and from North America, where “only” 50% do.



Format of exhibitions in the coming years

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



Part 2: Detailed results or 5 regions and 20 countries

North America:

Mexico
US

Central and South America:

Argentina
Brazil
Colombia

Europe:

Germany
Italy
Russia
Spain
United Kingdom

Middle East / Africa:

South Africa
UAE

Asia - Pacific:

Australia
China
India
Indonesia
Japan
Singapore
South Korea
Thailand

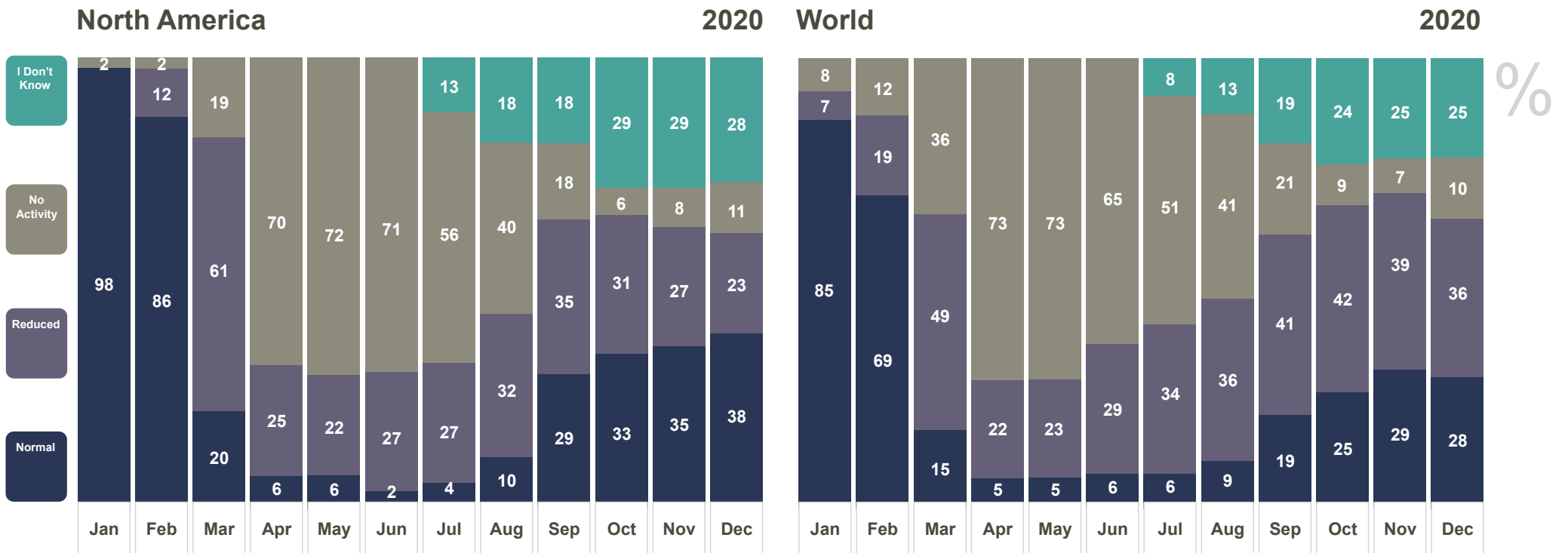
North America



Operations in 2020 North America



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



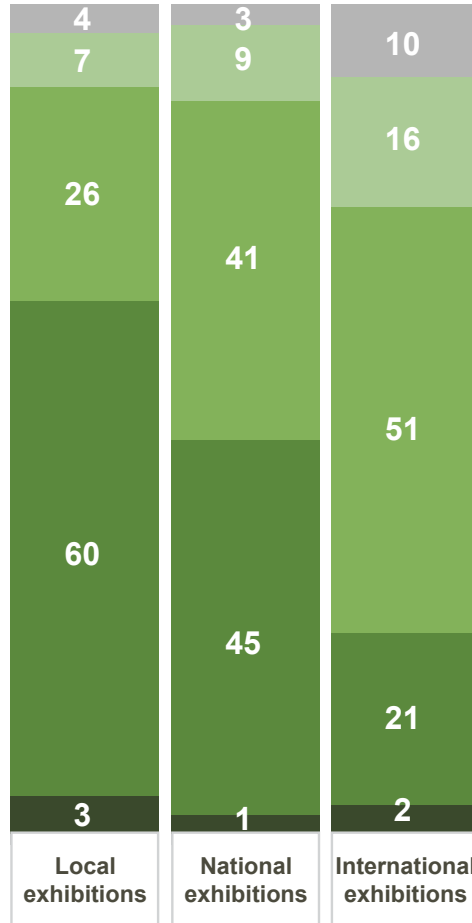
Reopening Exhibitions North America



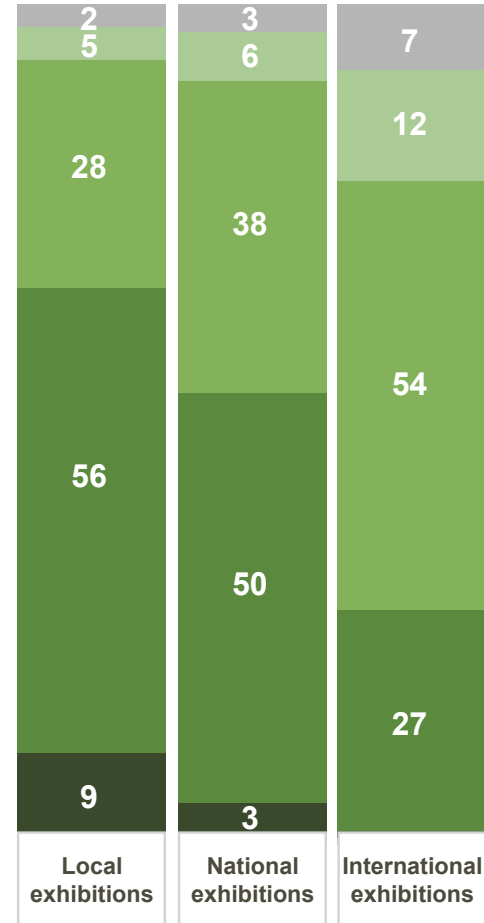
When do you believe exhibitions will open again in your city?

- Not Clear yet
- Later
- 2021-H1
- 2020-H2
- 2020-Q2

North America



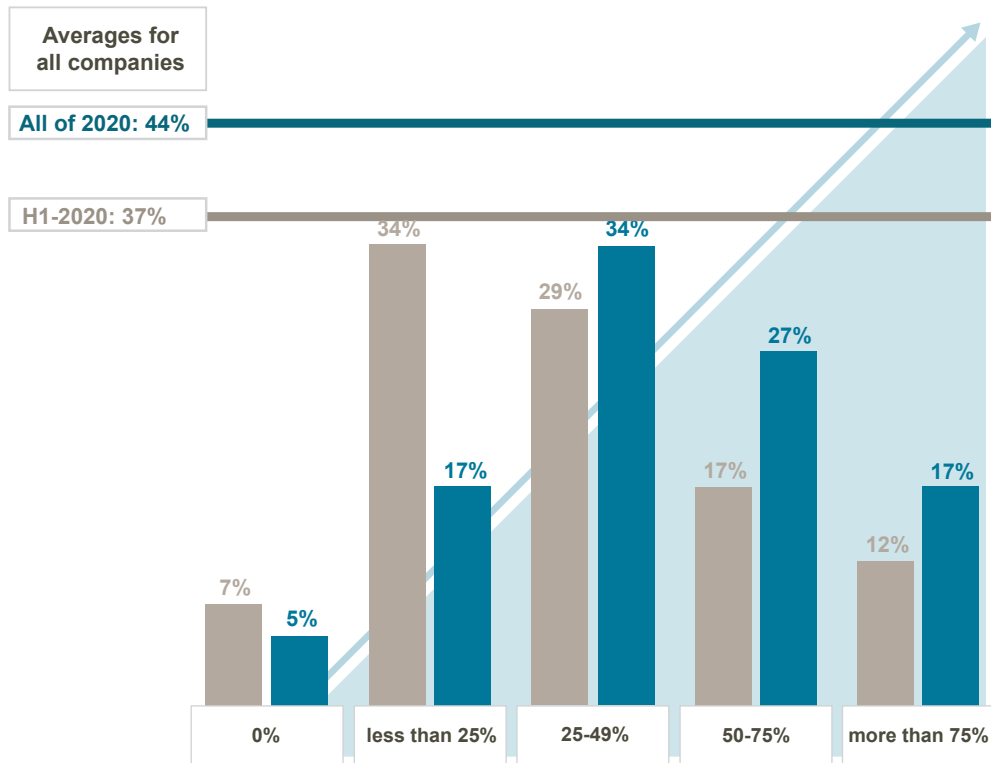
World



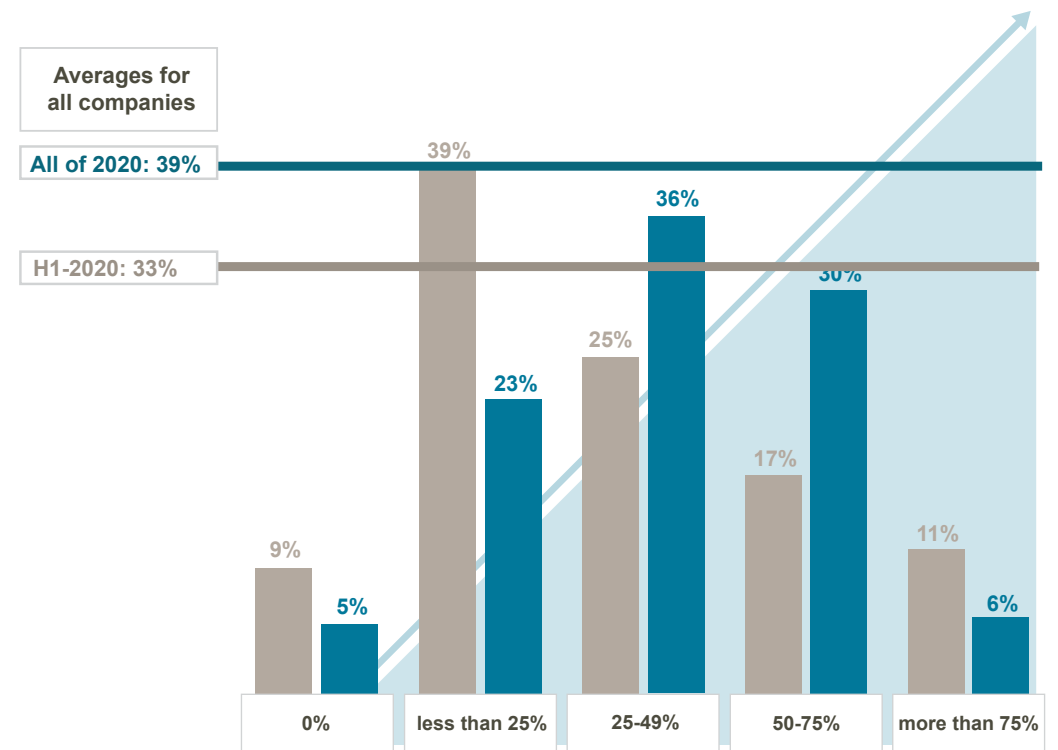
%

Revenue compared to last year (2019)

North America

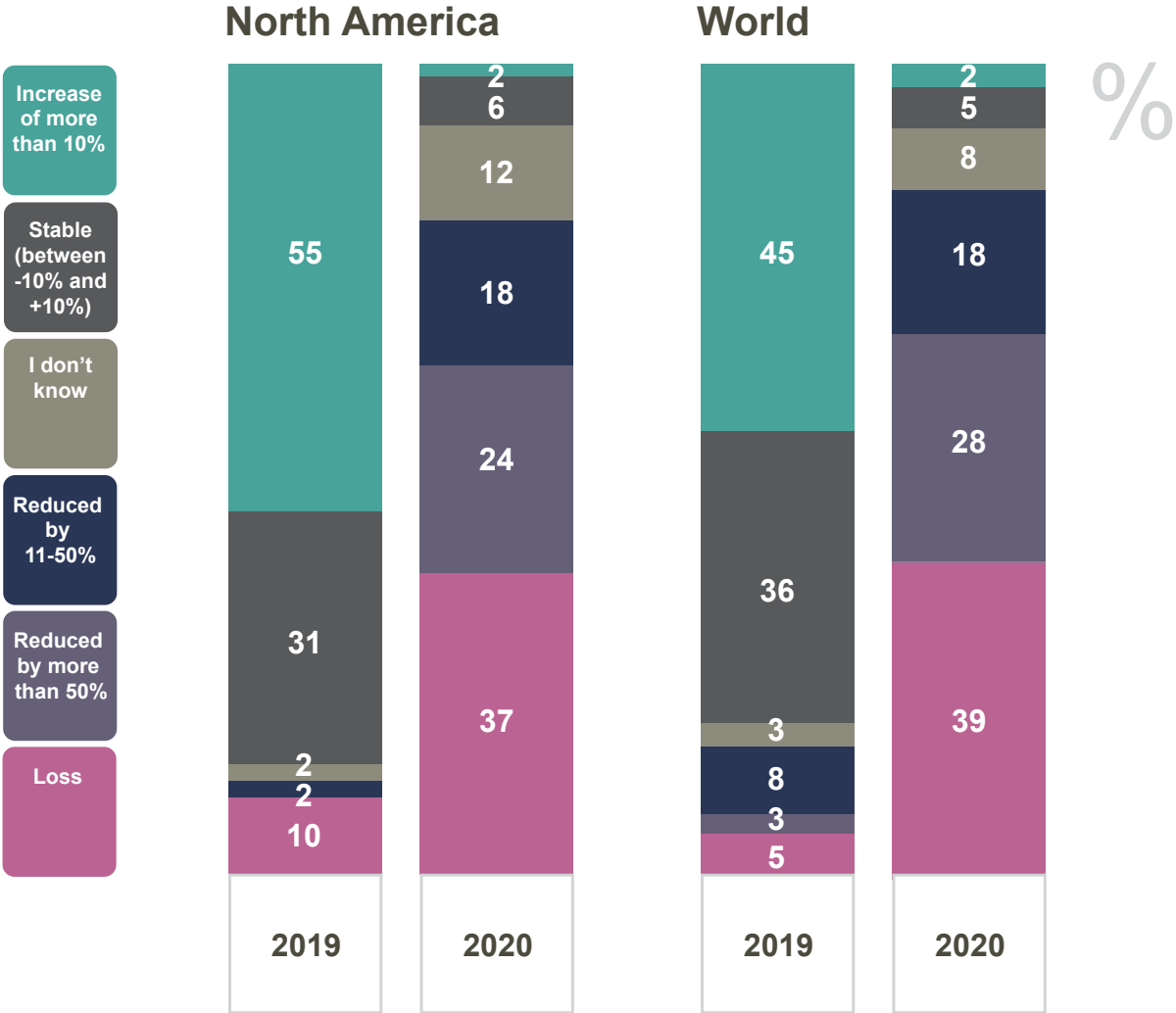


World



■ H1-2020 ■ all of 2020

Operating Profits North America



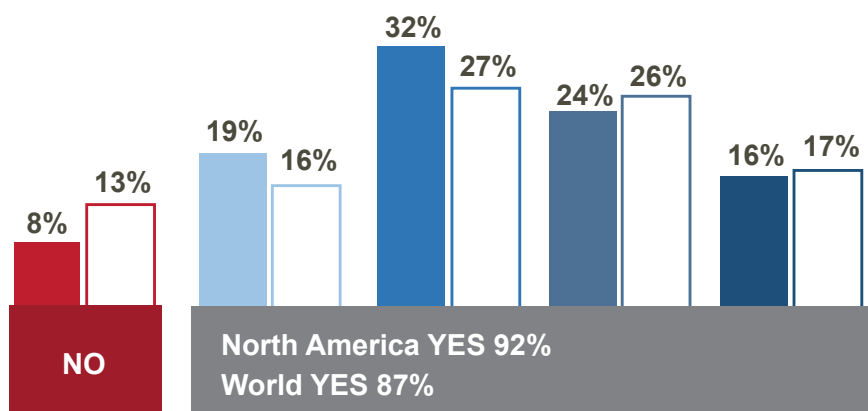
Cost Reductions - Public Financial Support North America



Did your company implement cost reductions?

North America

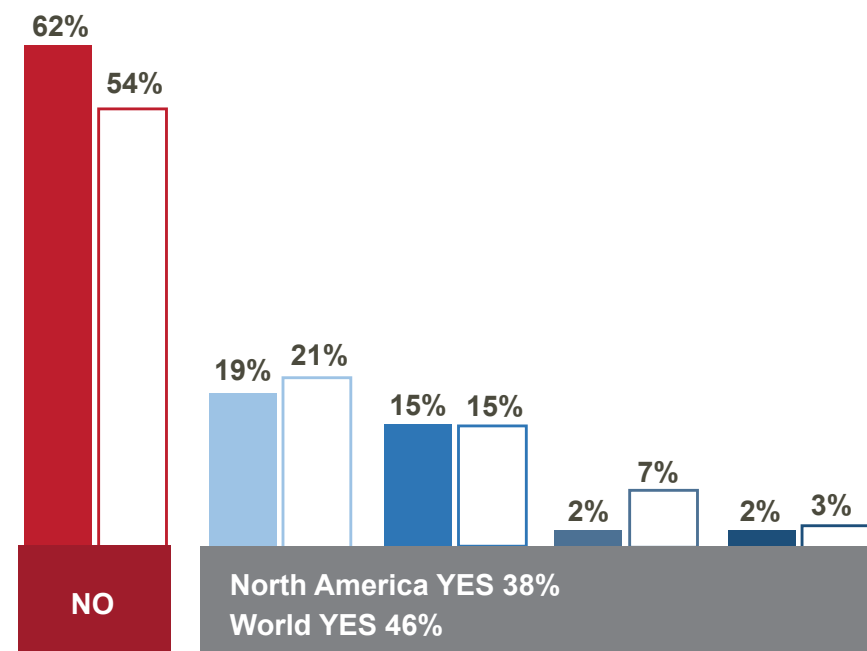
World



Did your company benefit from public financial support?

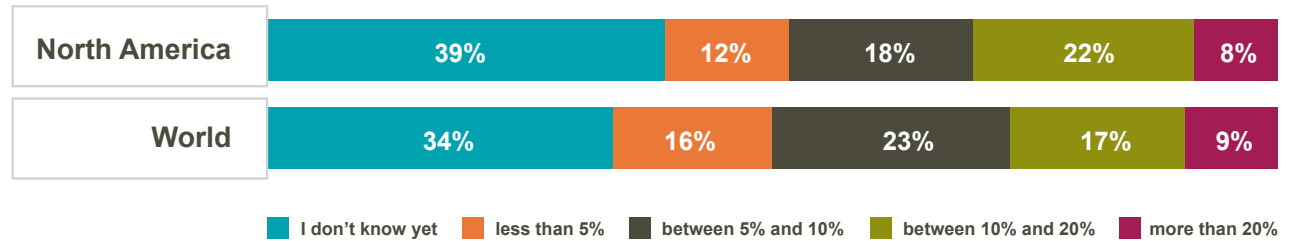
North America

World



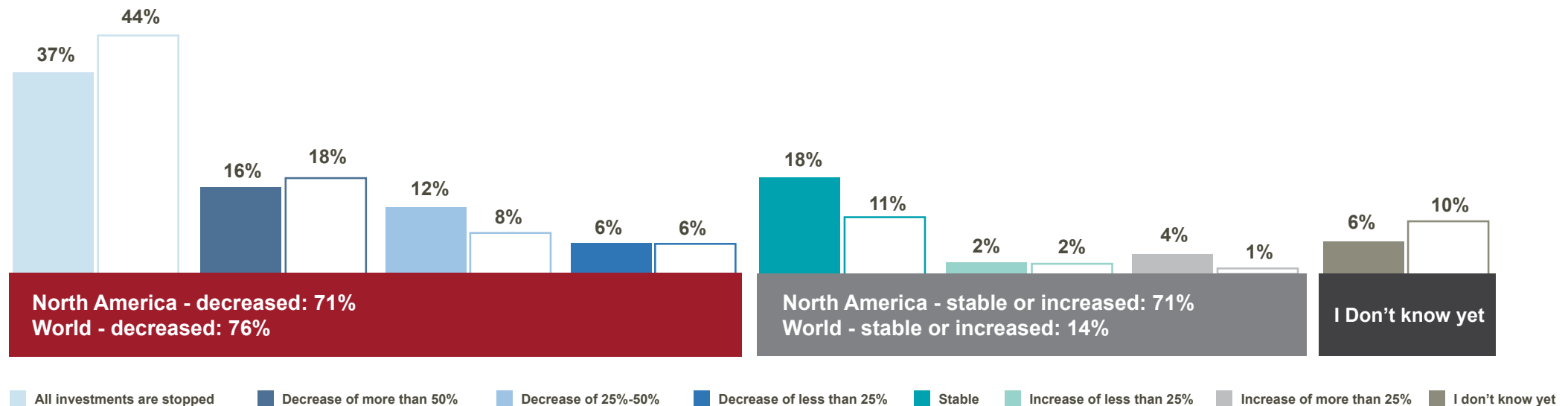
■ No
 ■ Yes, for less than 10% of our 2019 overall costs
 ■ Yes, for between 10% and 25% of our 2019 overall costs
 ■ Yes, for between 25% and 50% of our 2019 overall costs
 ■ Yes, for more than 50% of our 2019 overall costs

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?

North America World



Impact of Covid-19 on Digitalisation North America



How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

North America

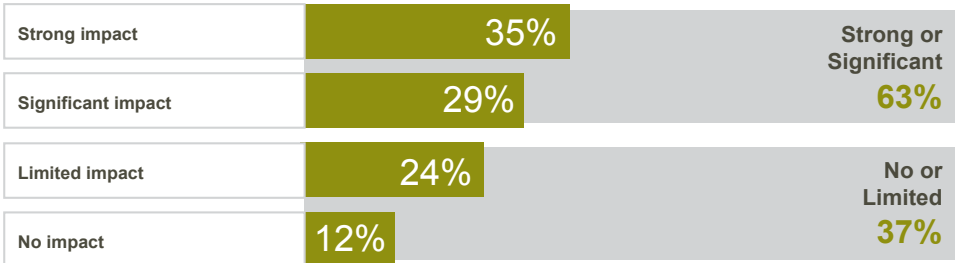


World

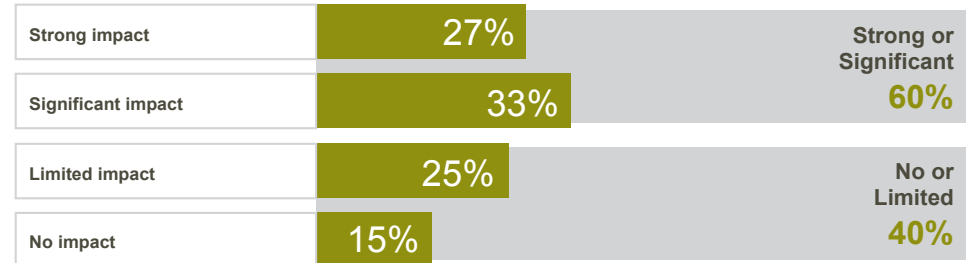


To what extent has Covid-19 impacted your company activities in digitalisation?

North America



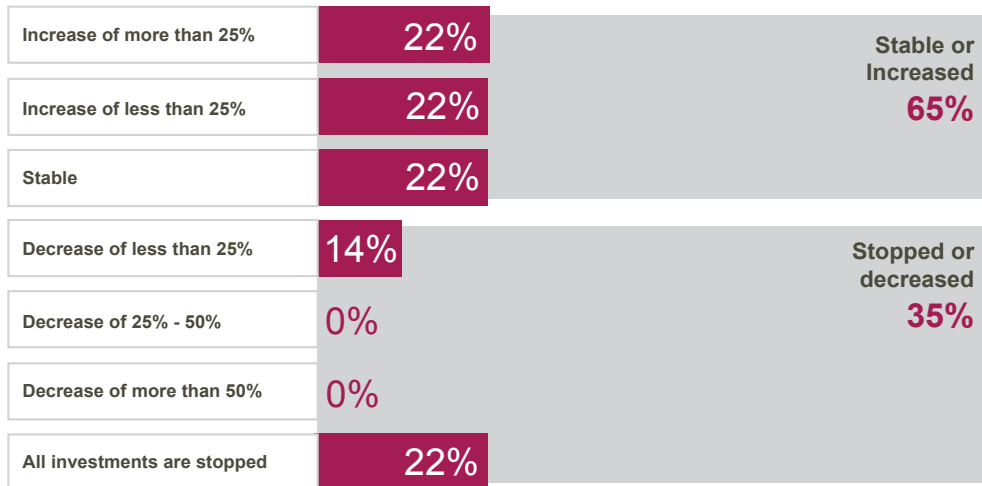
World



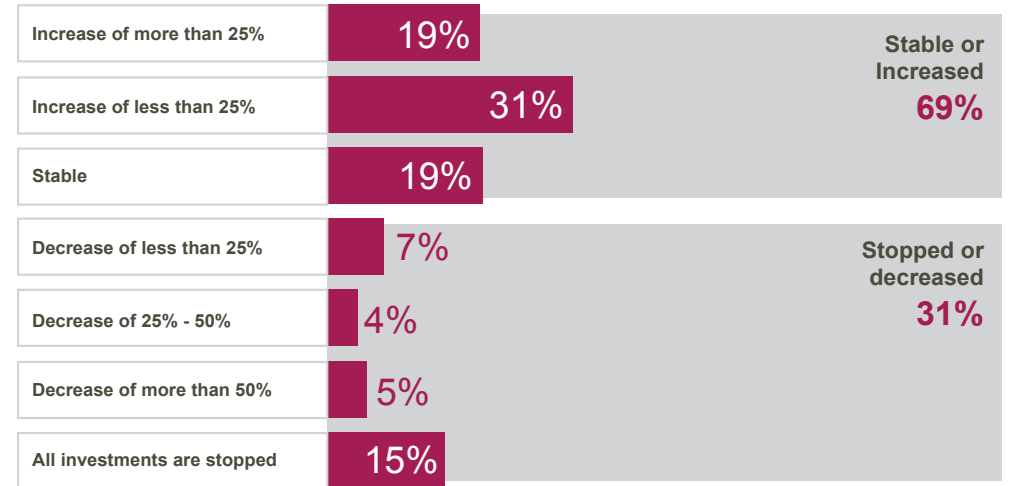


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?

North America

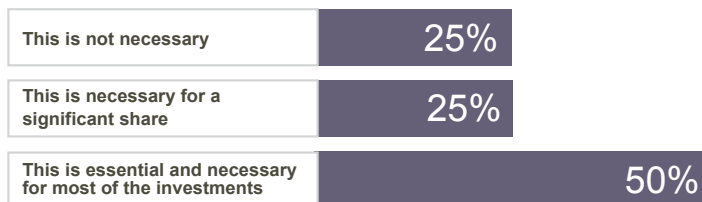


World

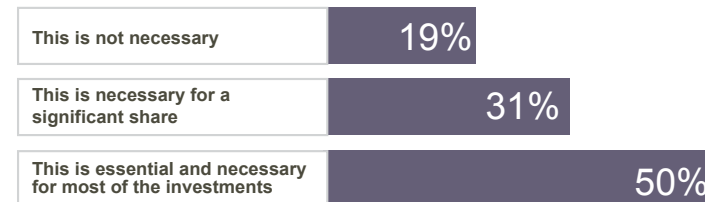


To what degree would you welcome some public investments in digitalisation?

North America



World



Impact of Covid-19 on Diversity North America



How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

North America

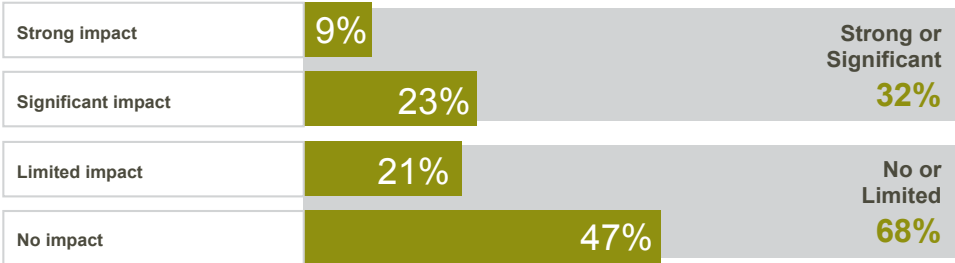


World

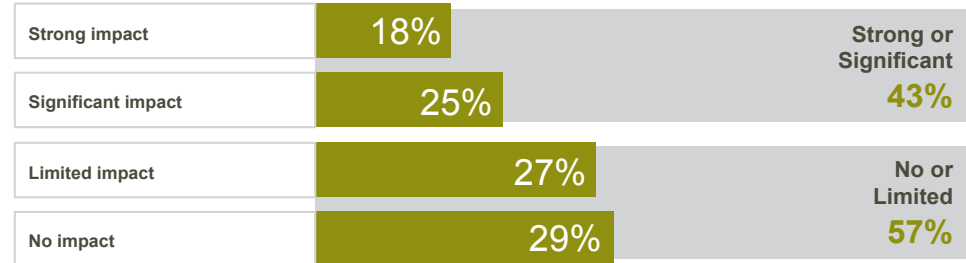


To what extent has Covid-19 impacted your company activities in diversity?

North America



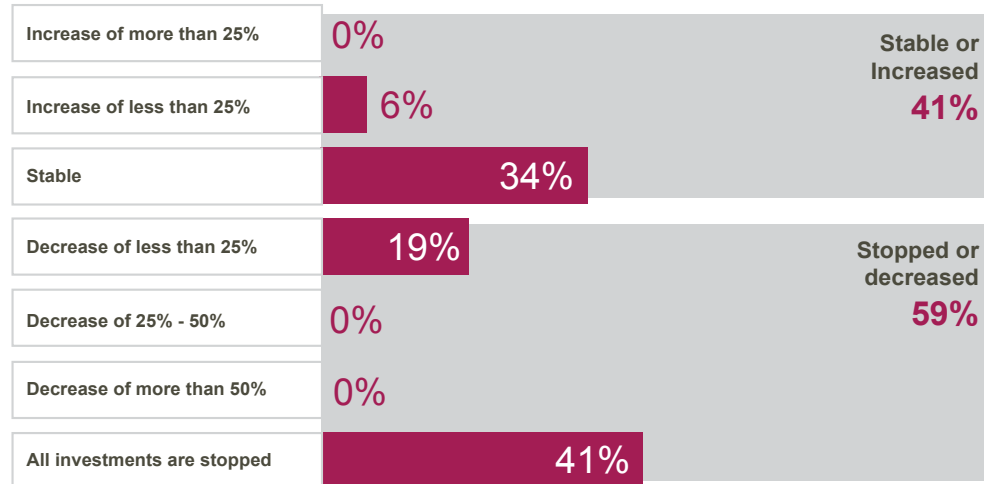
World



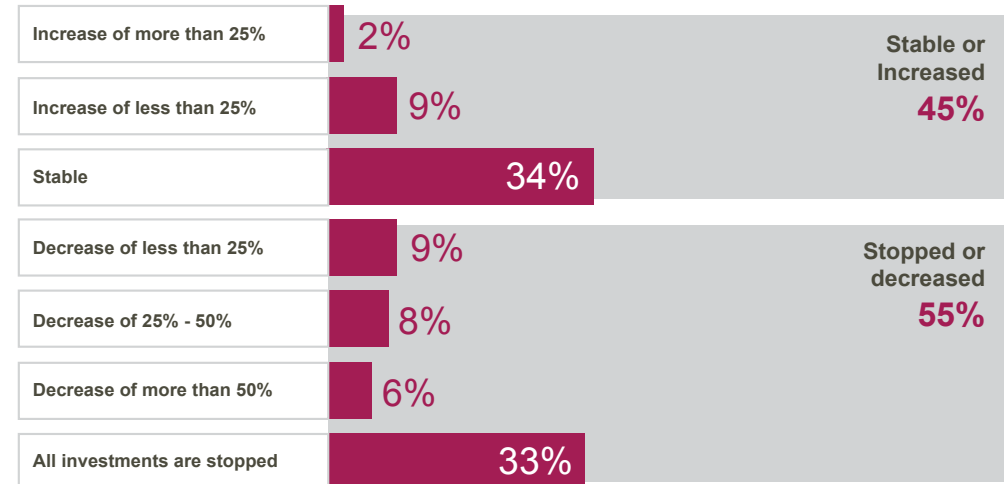


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?

North America



World

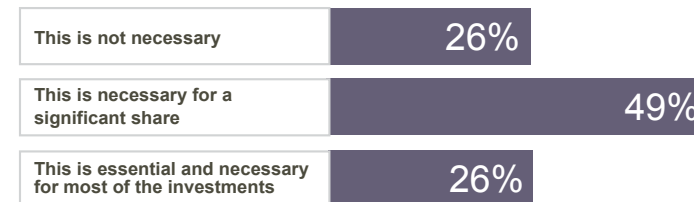


To what degree would you welcome some public investments in diversity?

North America



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

North America

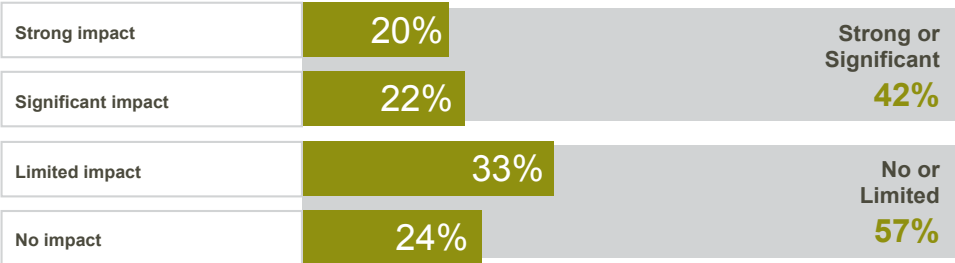


World

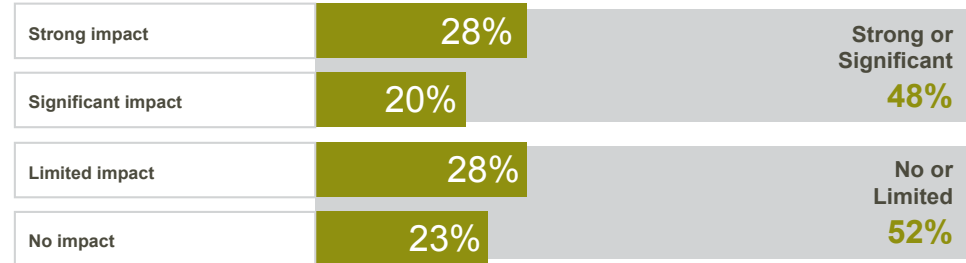


To what extent has Covid-19 impacted your company activities in sustainability?

North America



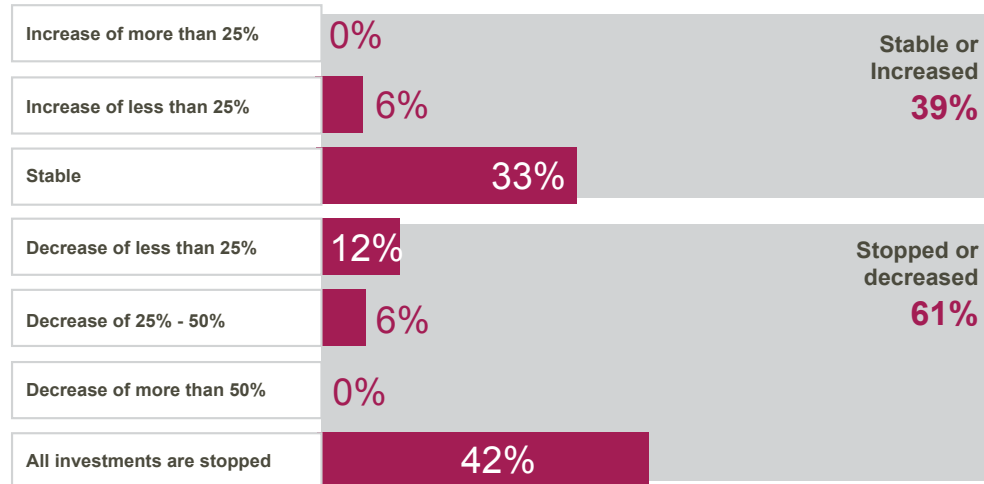
World



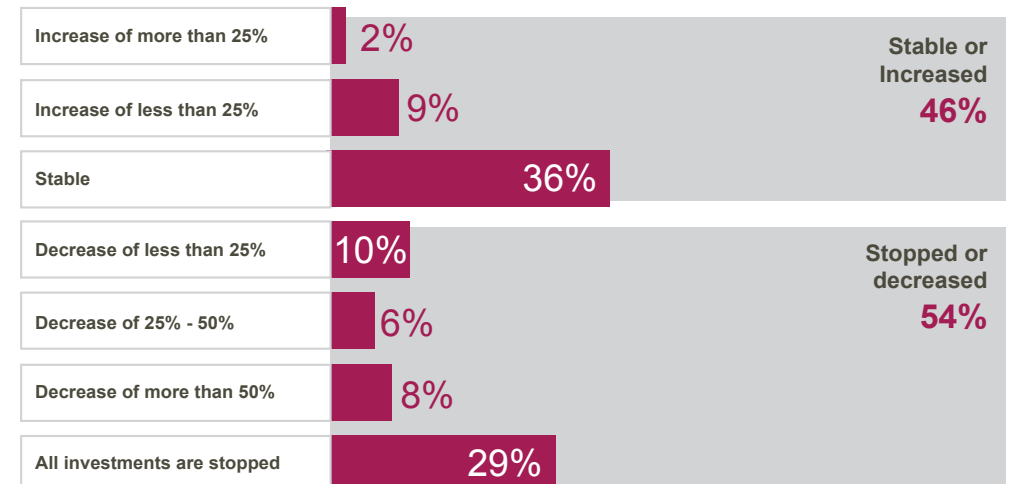


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?

North America

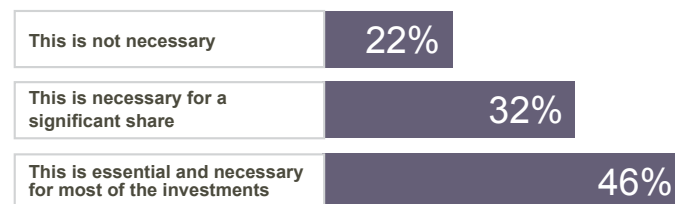


World

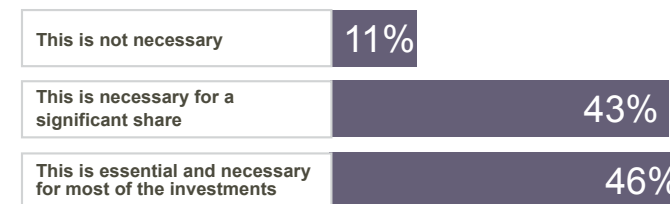


To what degree would you welcome some public investments in sustainability?

North America



World

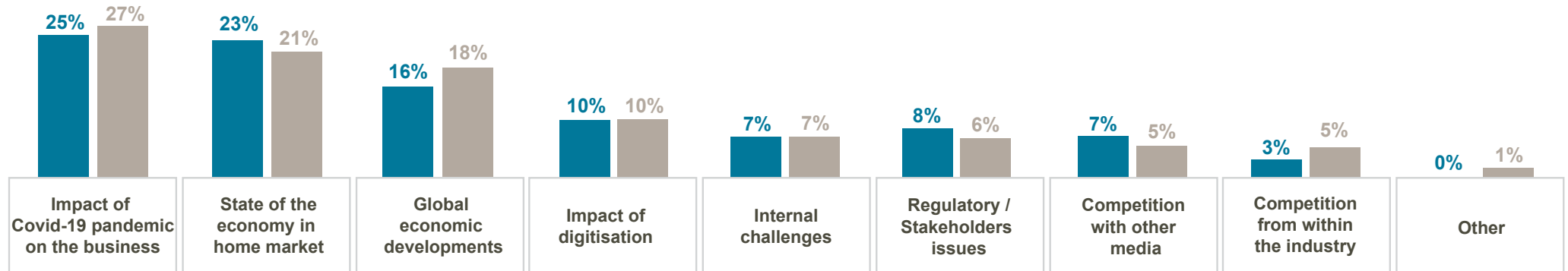


Most Important Business Issues - Format of Exhibitions - North America



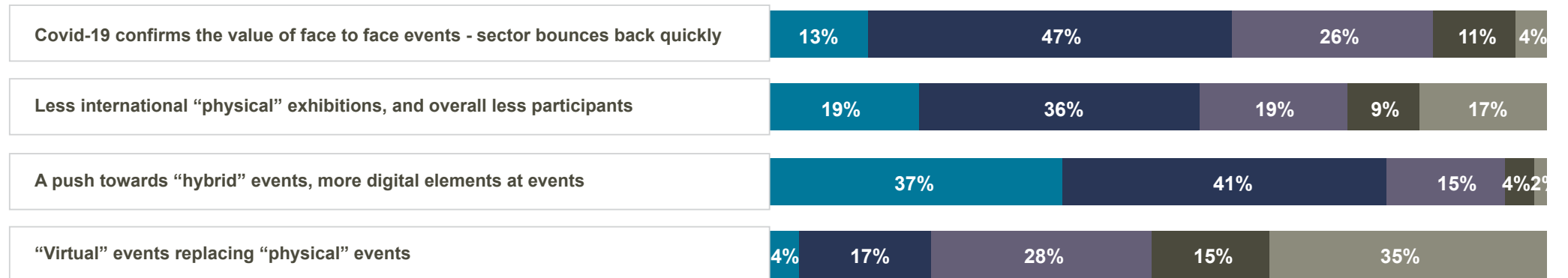
Most important business issues in the exhibition industry

North America Global



Format of exhibitions in the coming years

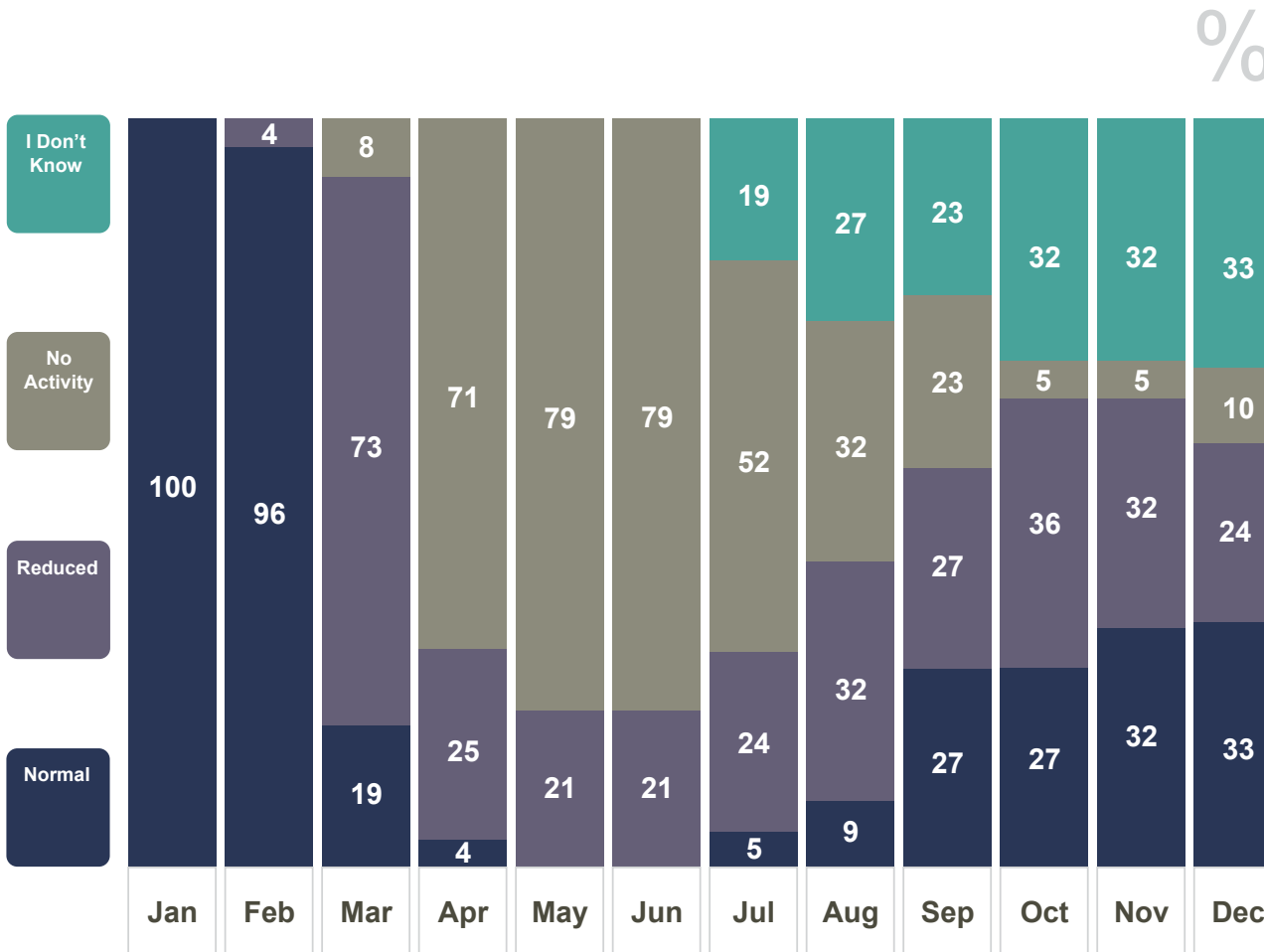
Yes, for sure Most probably Not sure Not sure at all Definitely not



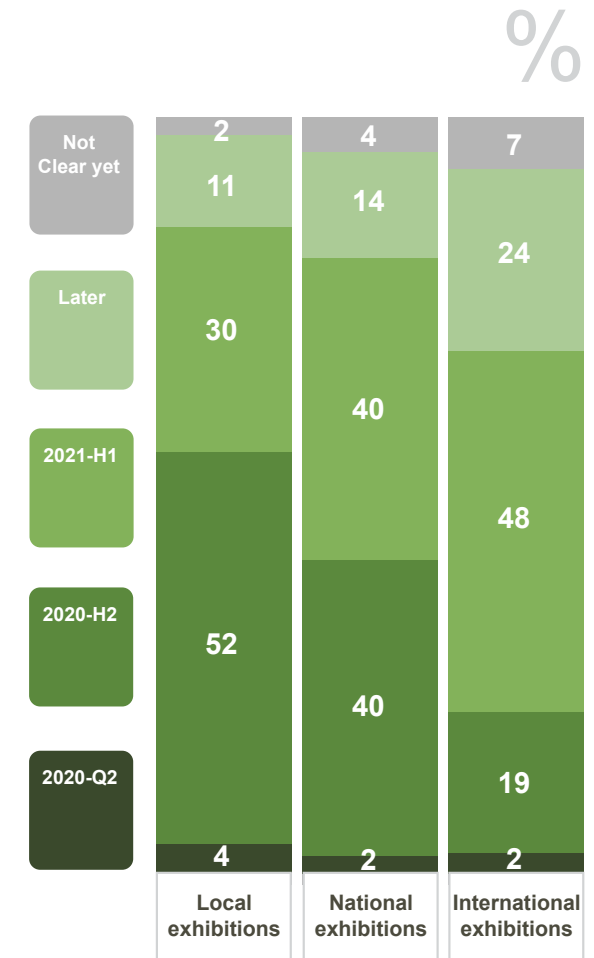
Detailed results for Mexico



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

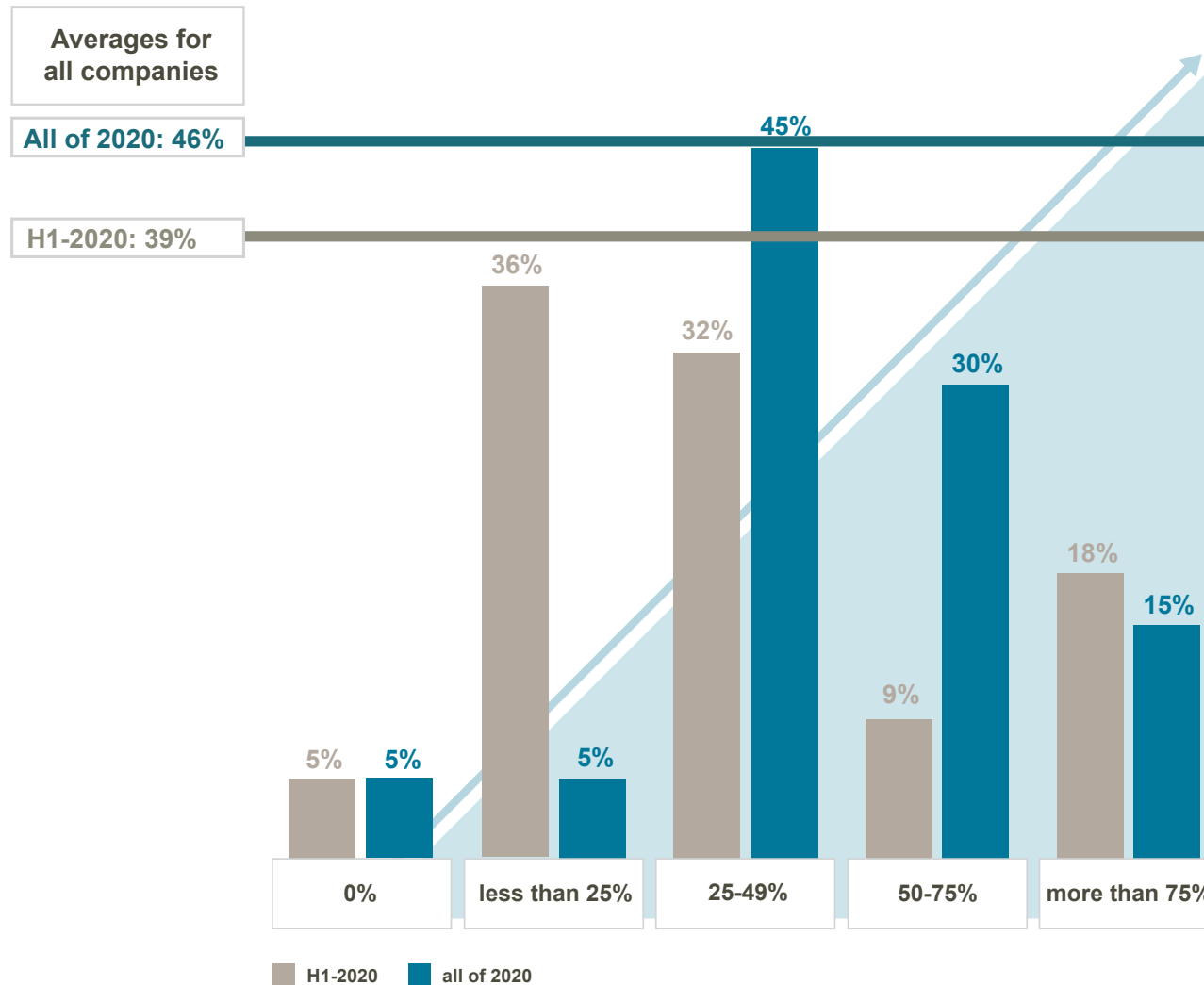


When do you believe exhibitions will open again in your city?

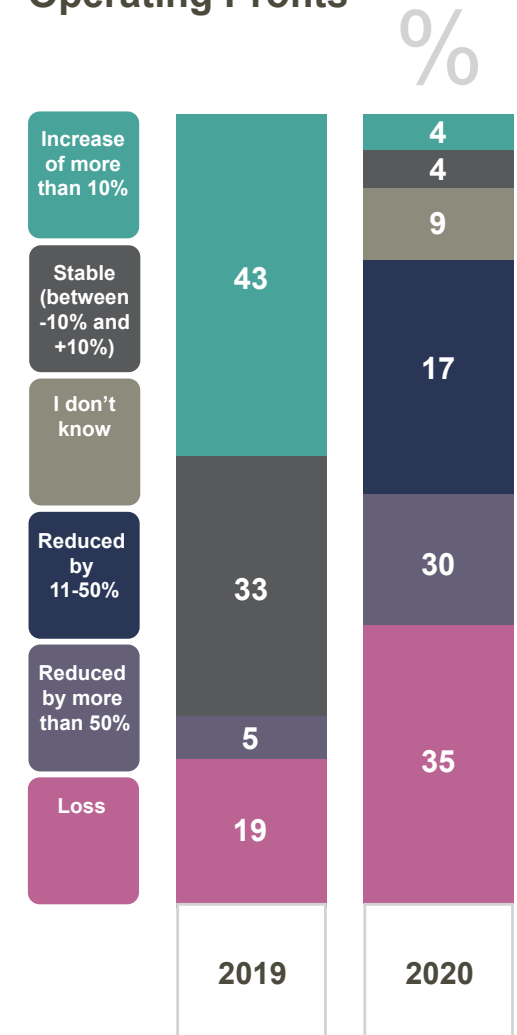




Revenue compared to last year (2019)

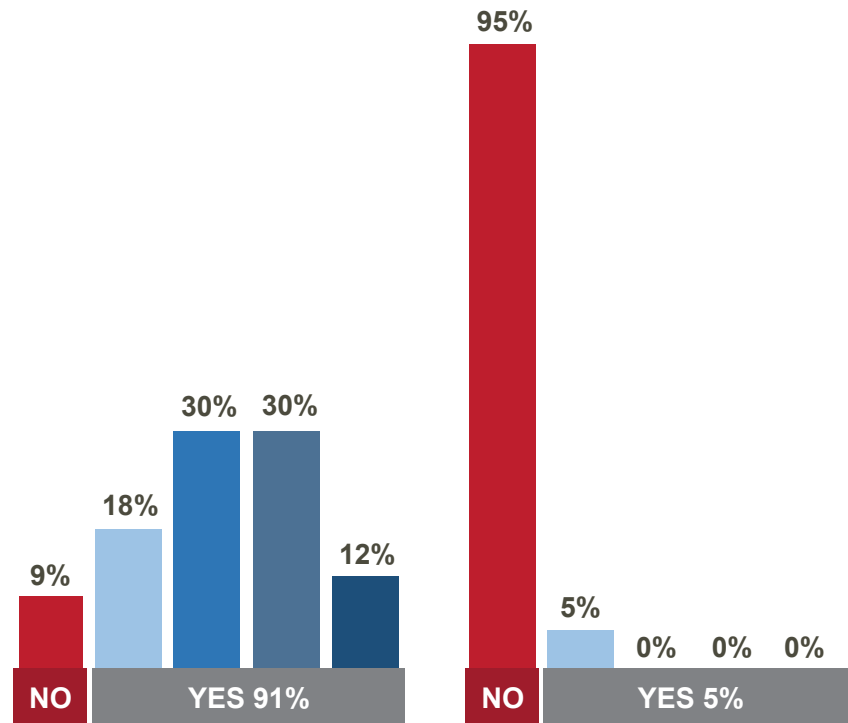


Operating Profits





Did your company implement cost reductions?



- 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

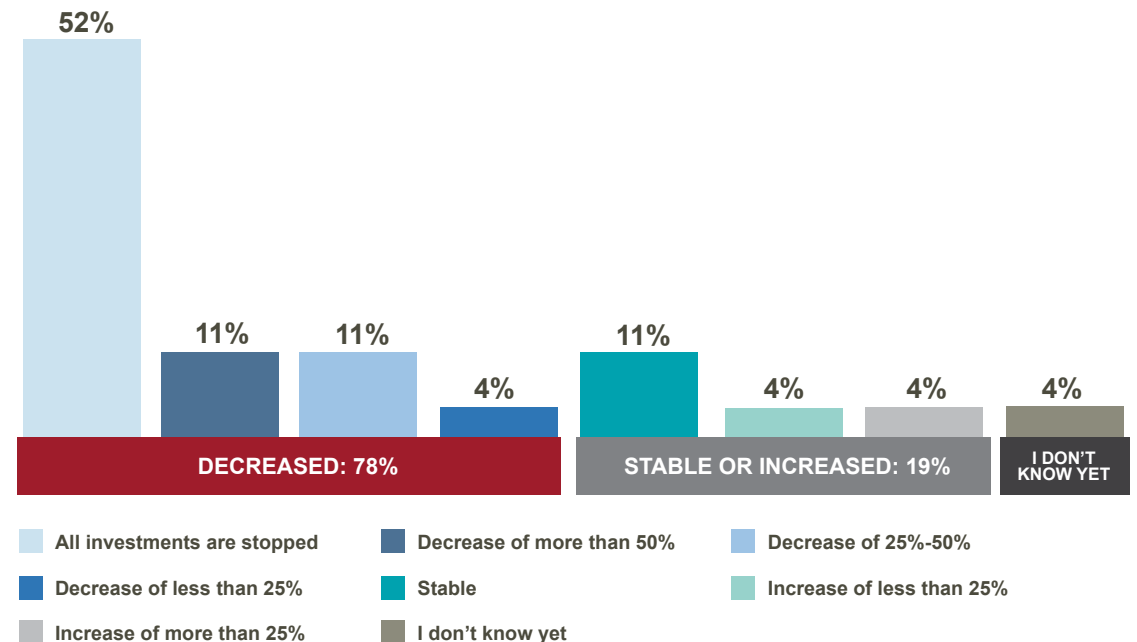
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





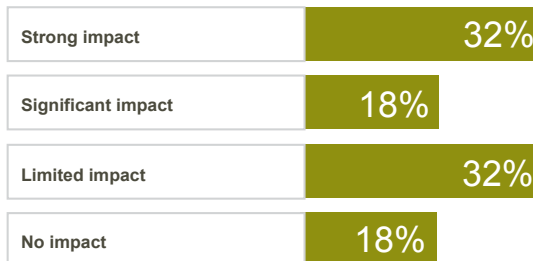
Digitalisation

How would you rate the transition of the exhibition industry?

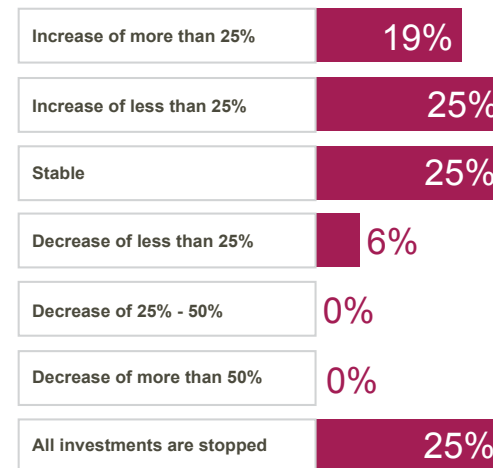
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



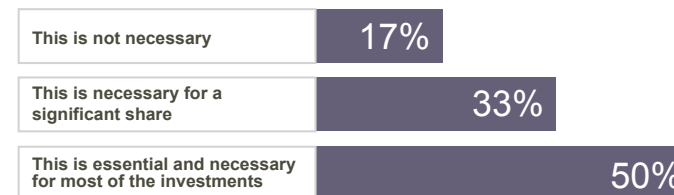
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





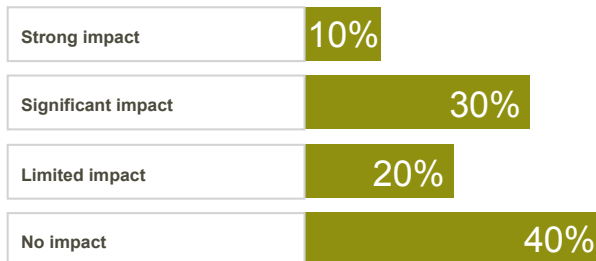
Diversity

How would you rate the transition of the exhibition industry?

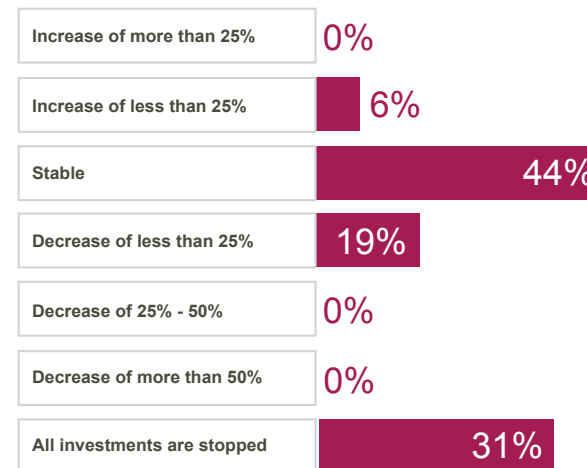
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





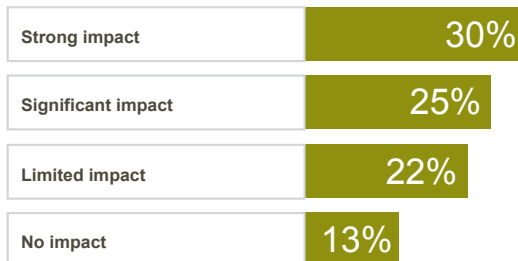
Sustainability

How would you rate the transition of the exhibition industry?

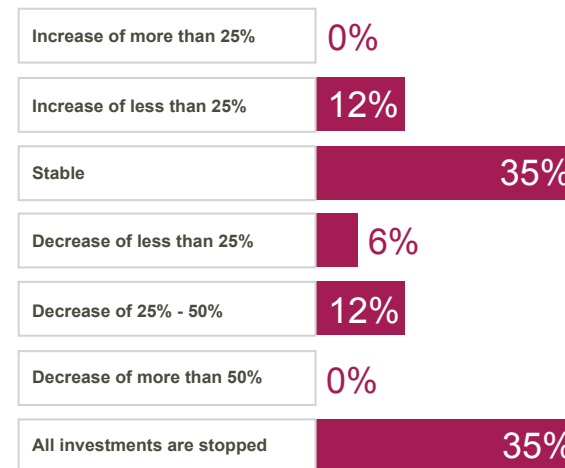
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



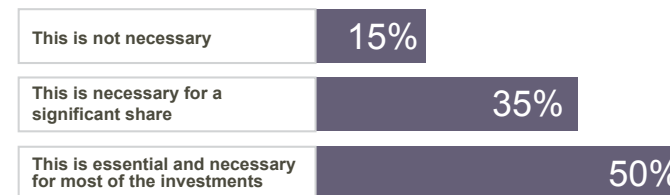
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

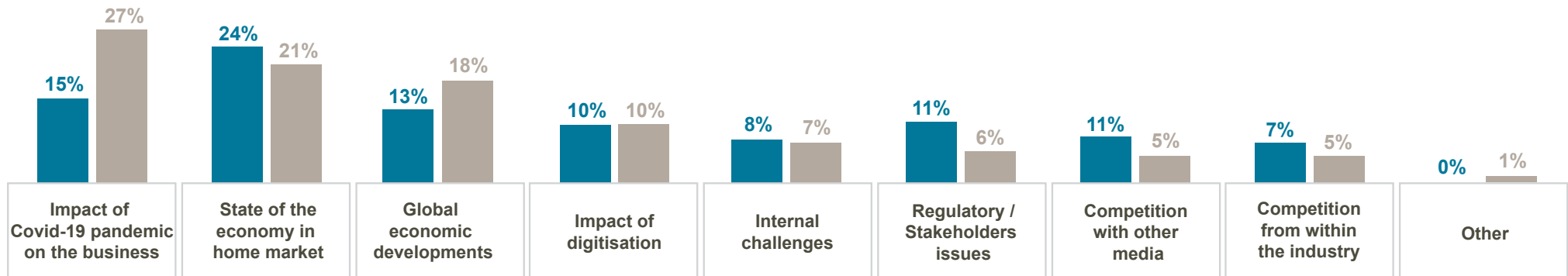


Detailed results for Mexico



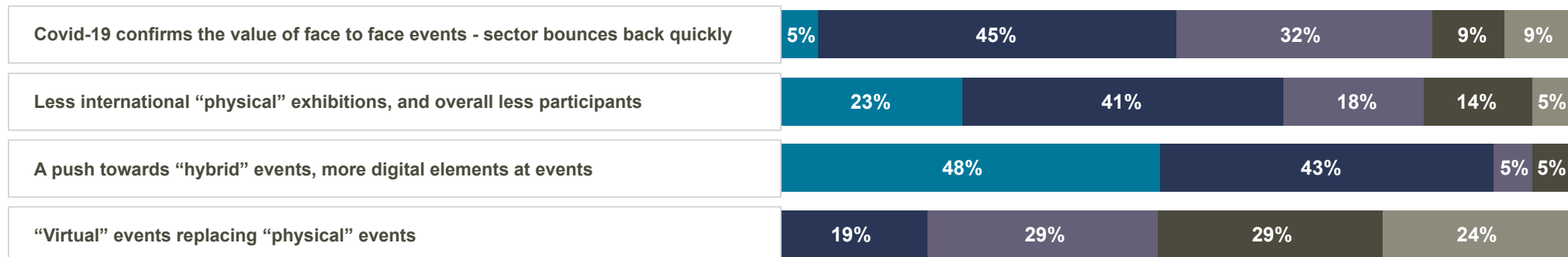
Most important business issues in the exhibition industry

Mexico Global



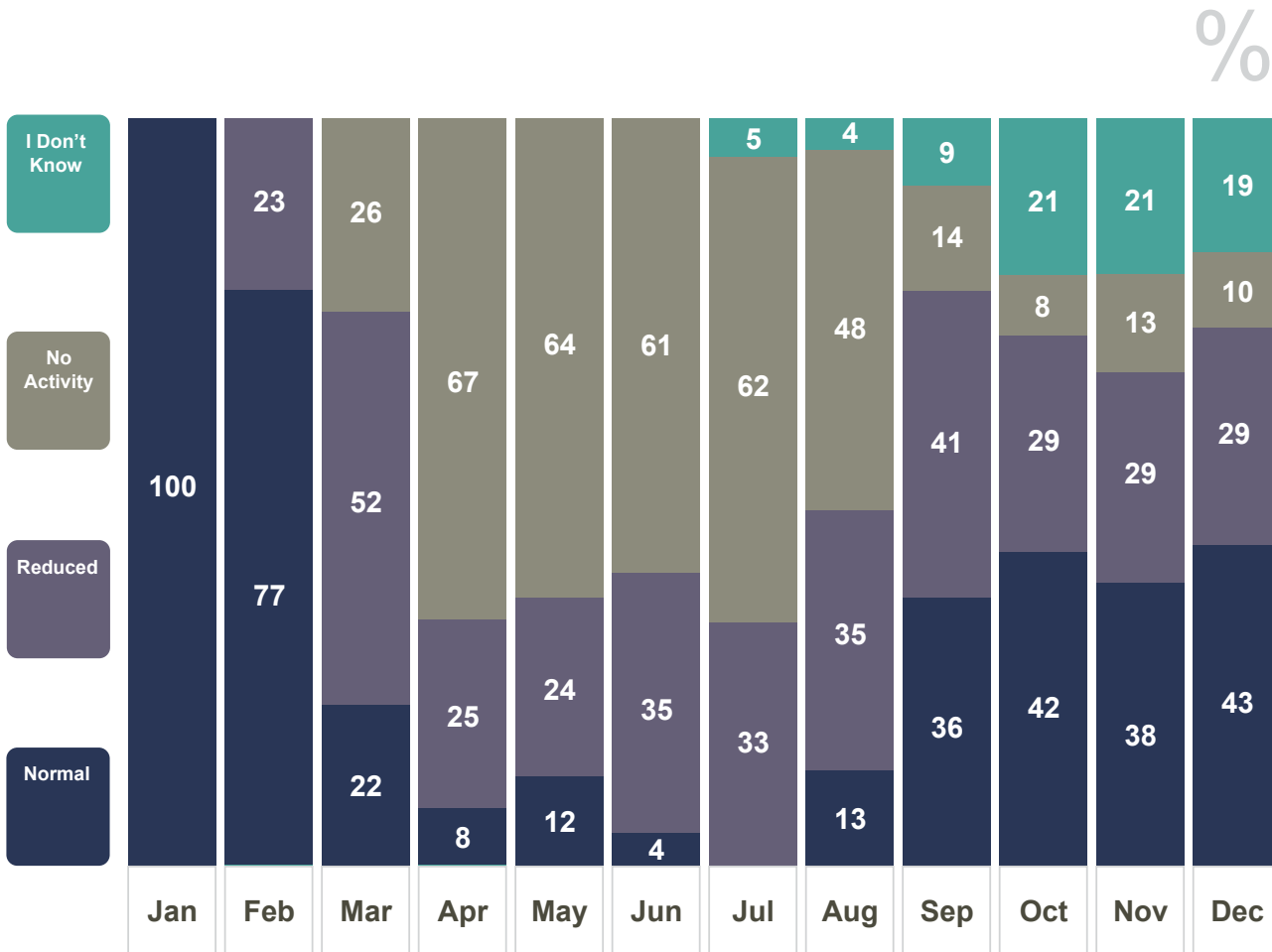
Format of exhibitions in the coming years

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

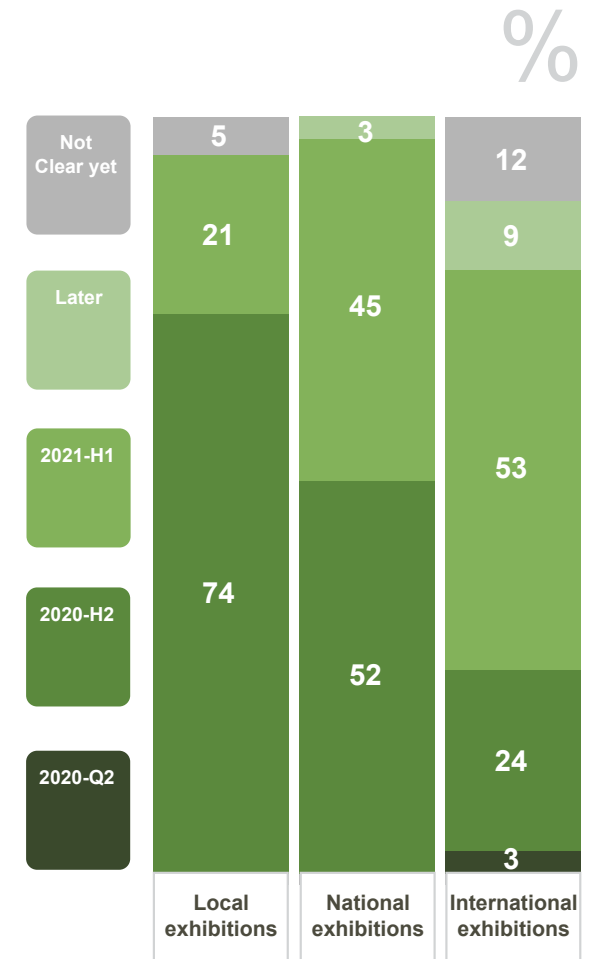




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

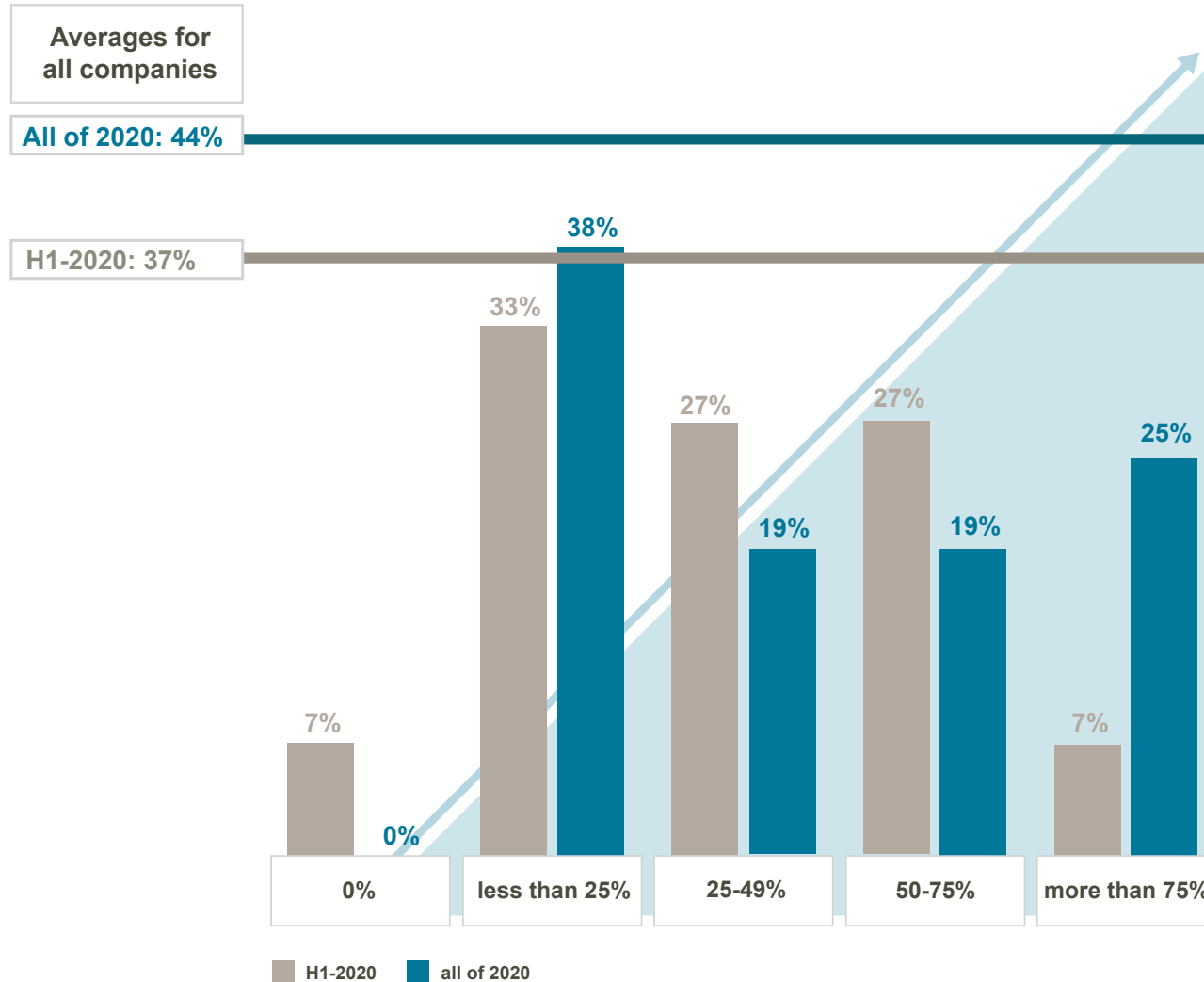


When do you believe exhibitions will open again in your city?

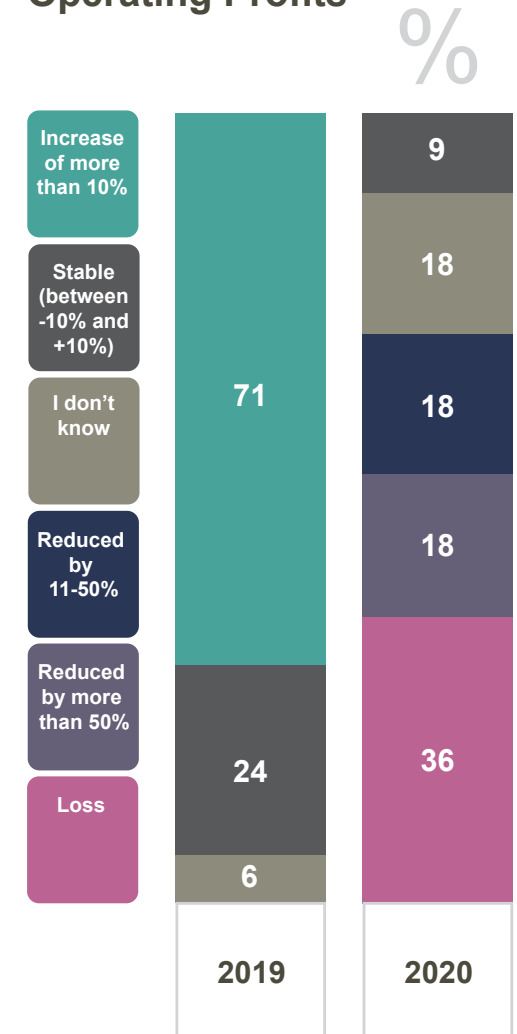




Revenue compared to last year (2019)

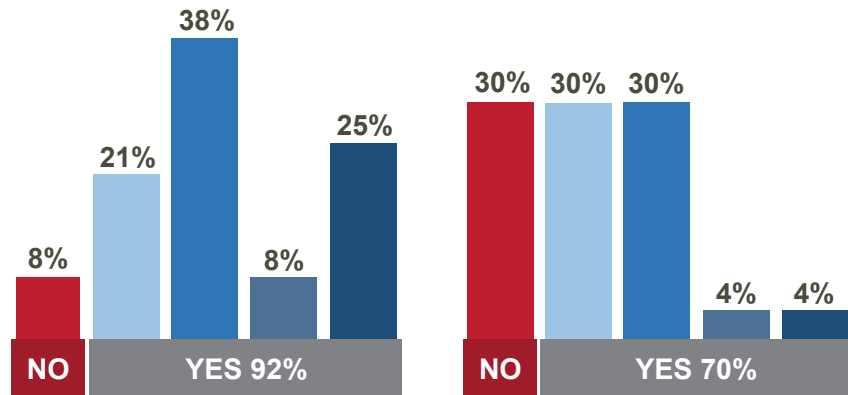


Operating Profits



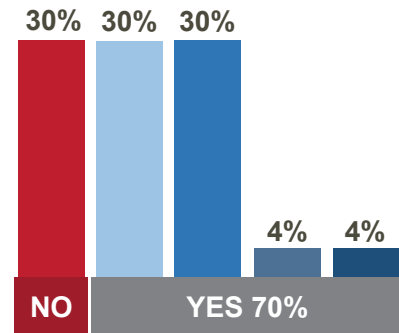


Did your company implement cost reductions?

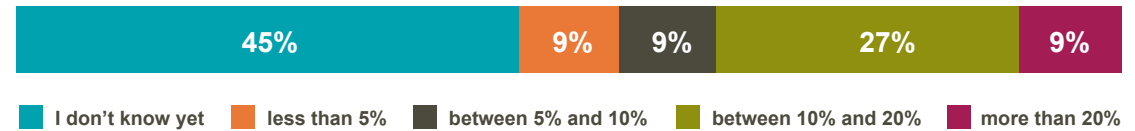


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

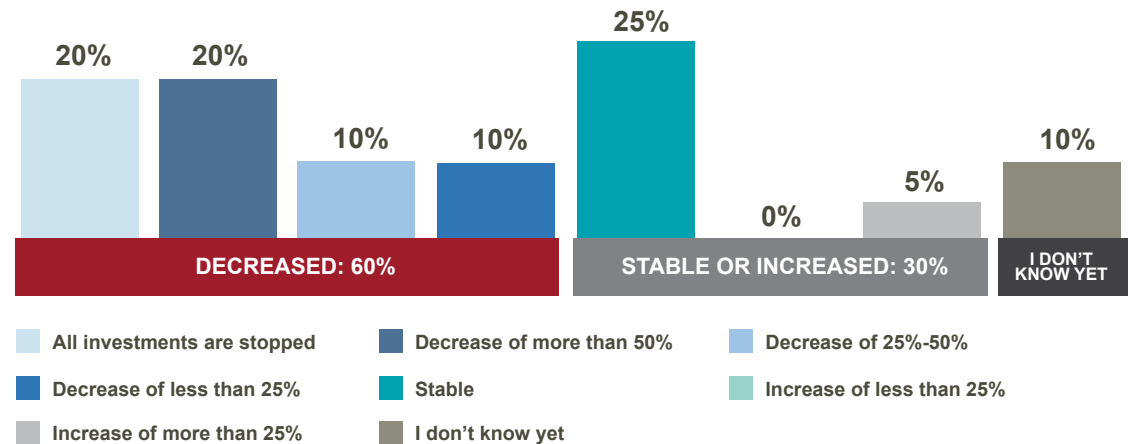
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?



- All investments are stopped
- Decrease of more than 50%
- Decrease of 25%-50%
- Decrease of less than 25%
- Stable
- Increase of less than 25%
- Increase of more than 25%
- I don't know yet



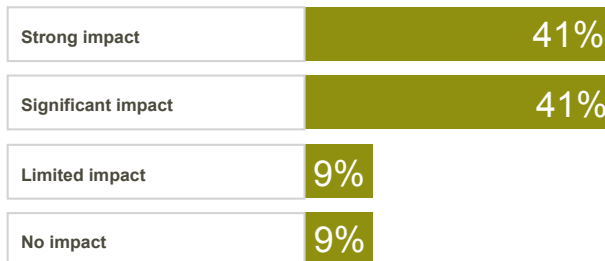
Digitalisation

How would you rate the transition of the exhibition industry?

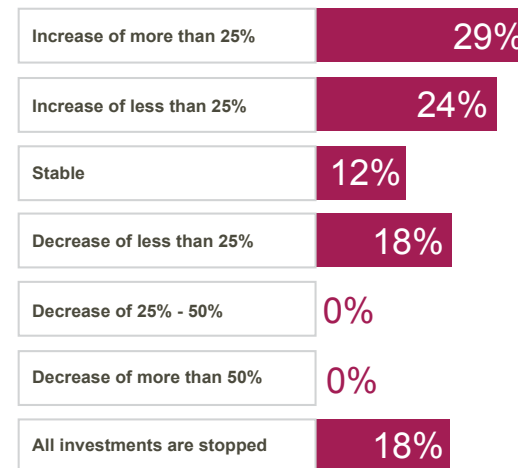
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



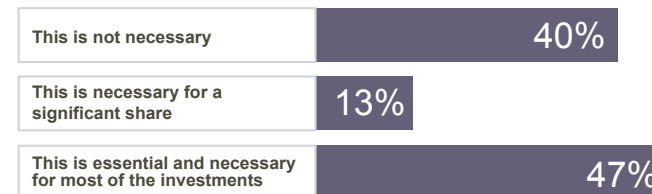
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





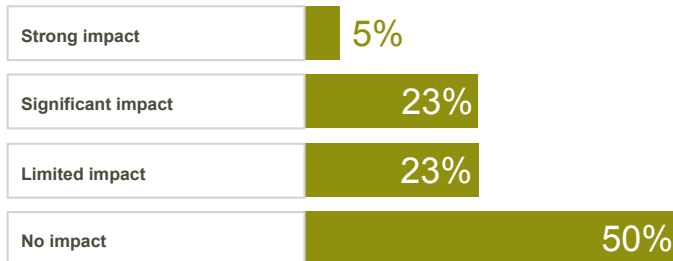
Diversity

How would you rate the transition of the exhibition industry?

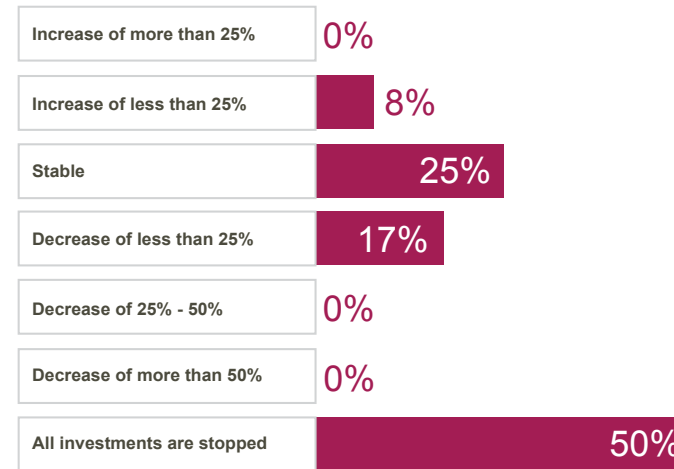
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



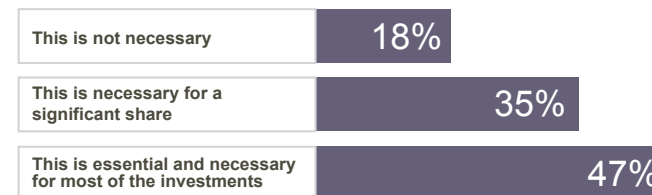
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





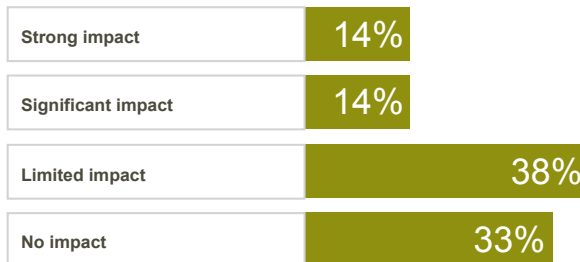
Sustainability

How would you rate the transition of the exhibition industry?

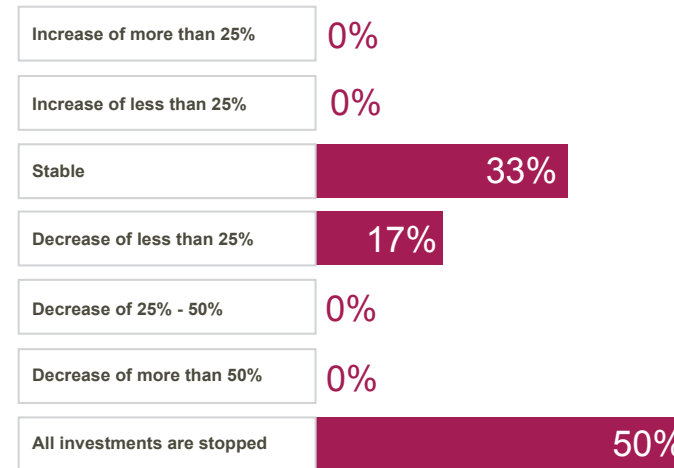
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



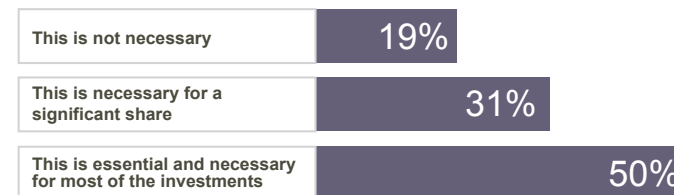
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



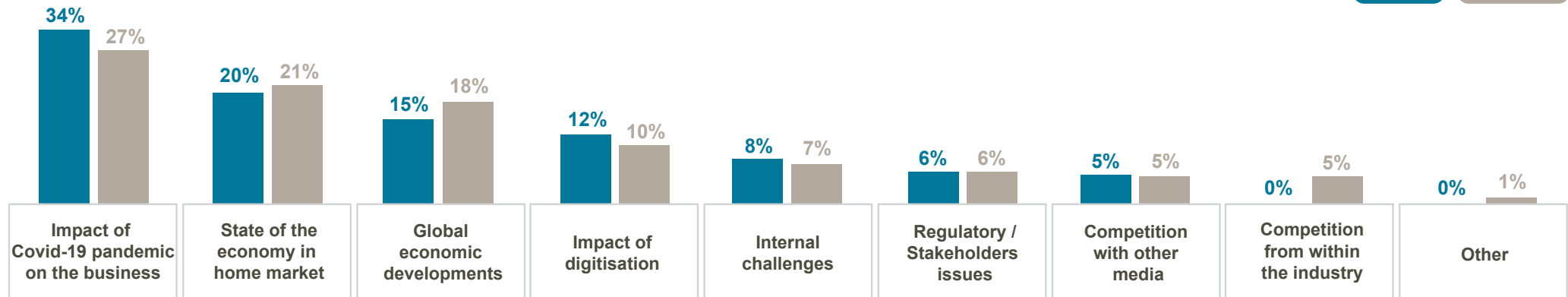
To what degree would you welcome some public investments in sustainability?





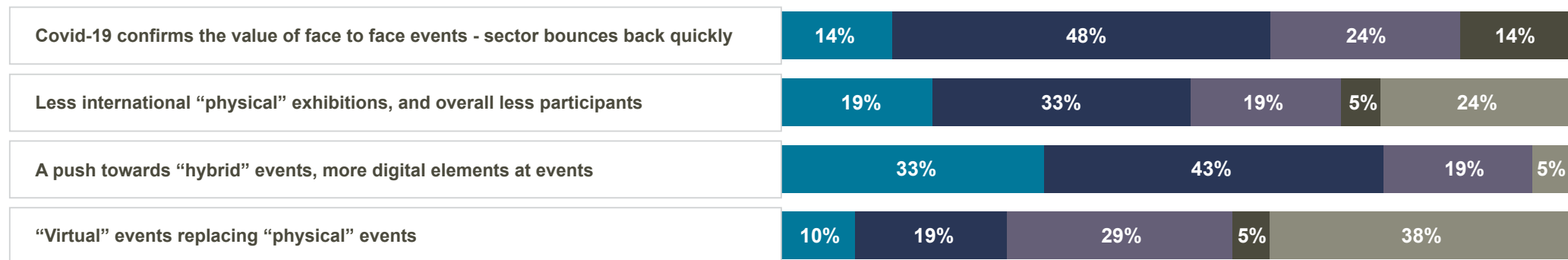
Most important business issues in the exhibition industry

USA Global



Format of exhibitions in the coming years

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



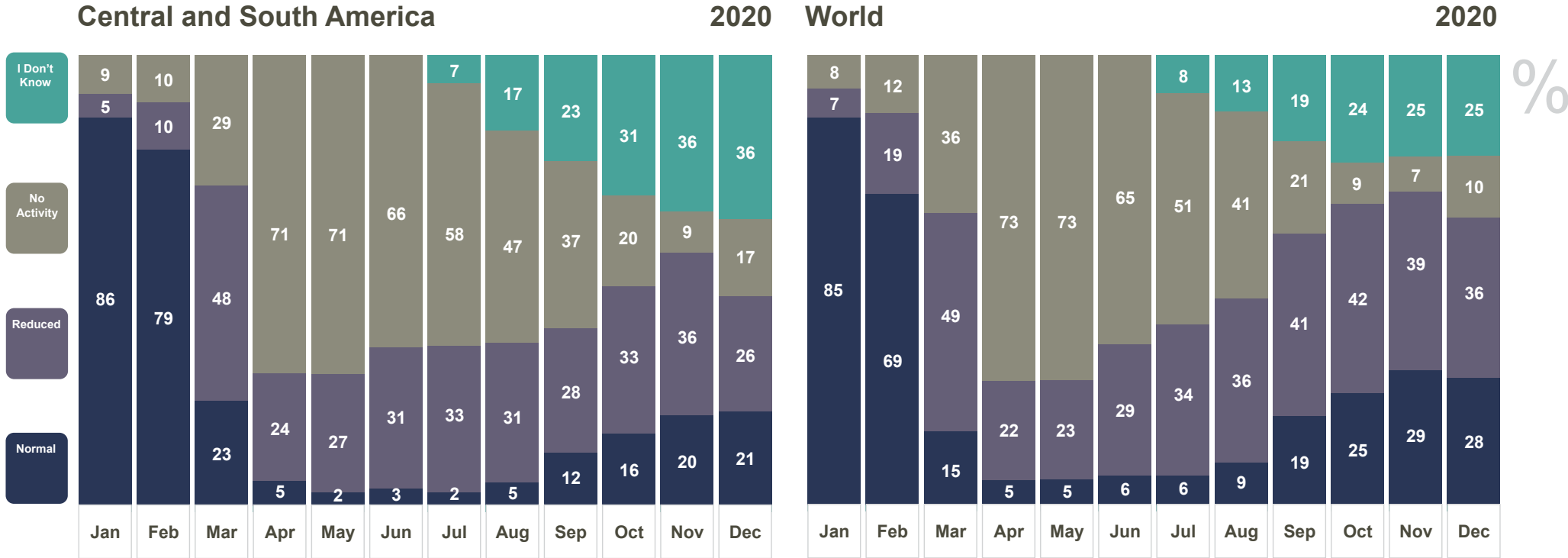
A network diagram consisting of several circular nodes connected by thin lines, set against a solid red background. The nodes are arranged in a roughly triangular pattern, with lines connecting them to form a mesh. The nodes themselves are semi-transparent, showing some internal structure.

Central and South America

Operations in 2020 Central and South America



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



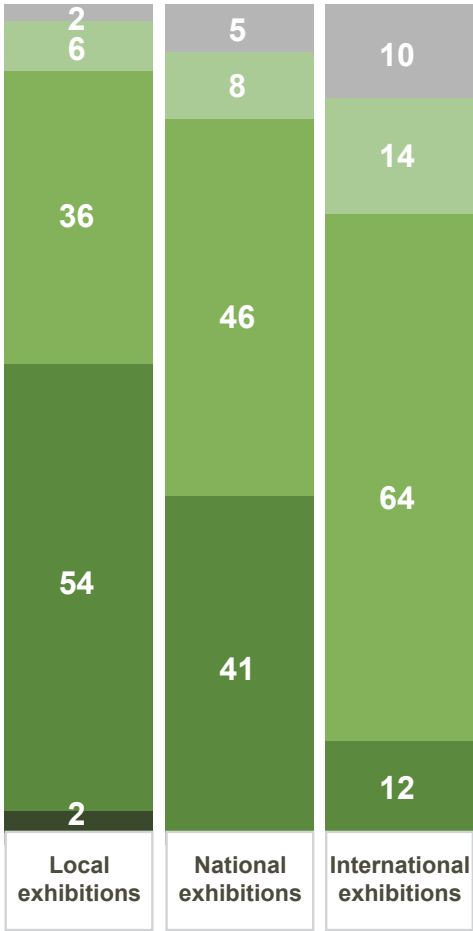
Reopening Exhibitions Central and South America



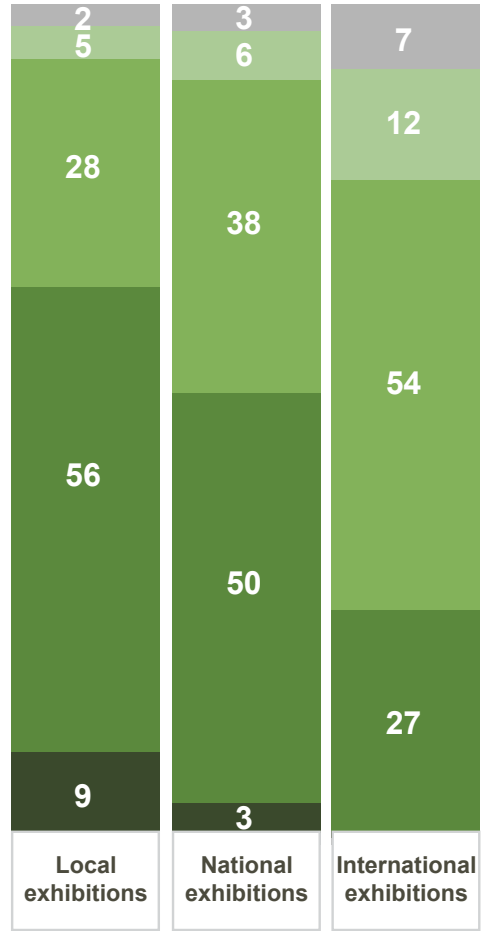
When do you believe exhibitions will open again in your city?

- Not Clear yet
- Later
- 2021-H1
- 2020-H2
- 2020-Q2

Central and South America



World

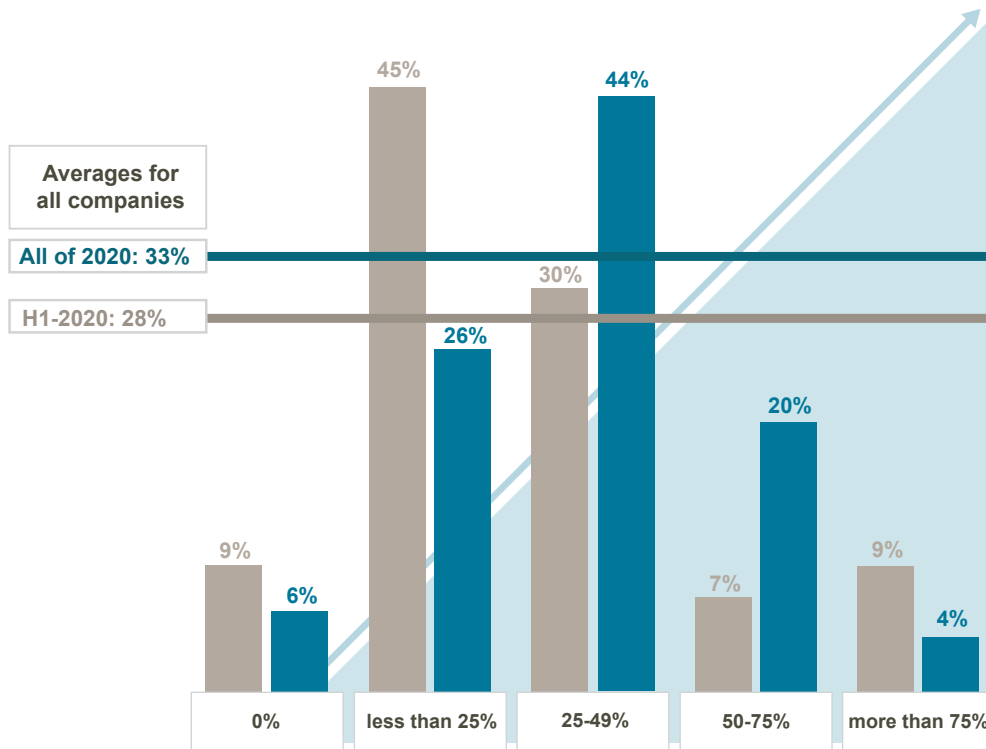


%

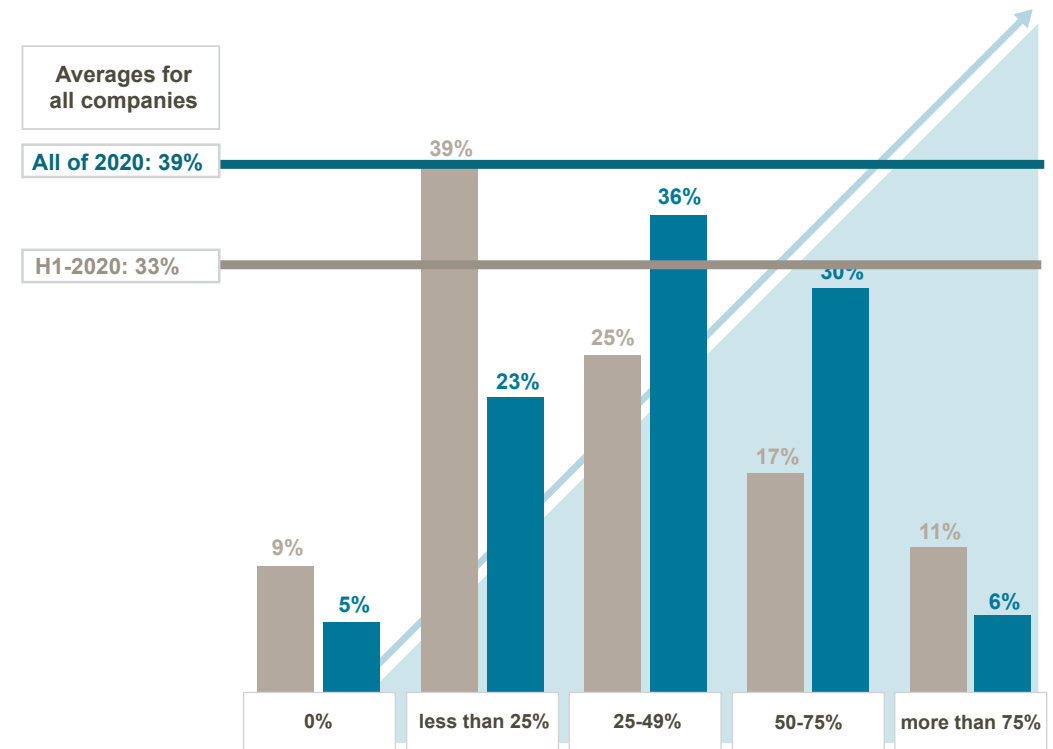


Revenue compared to last year (2019)

Central and South America

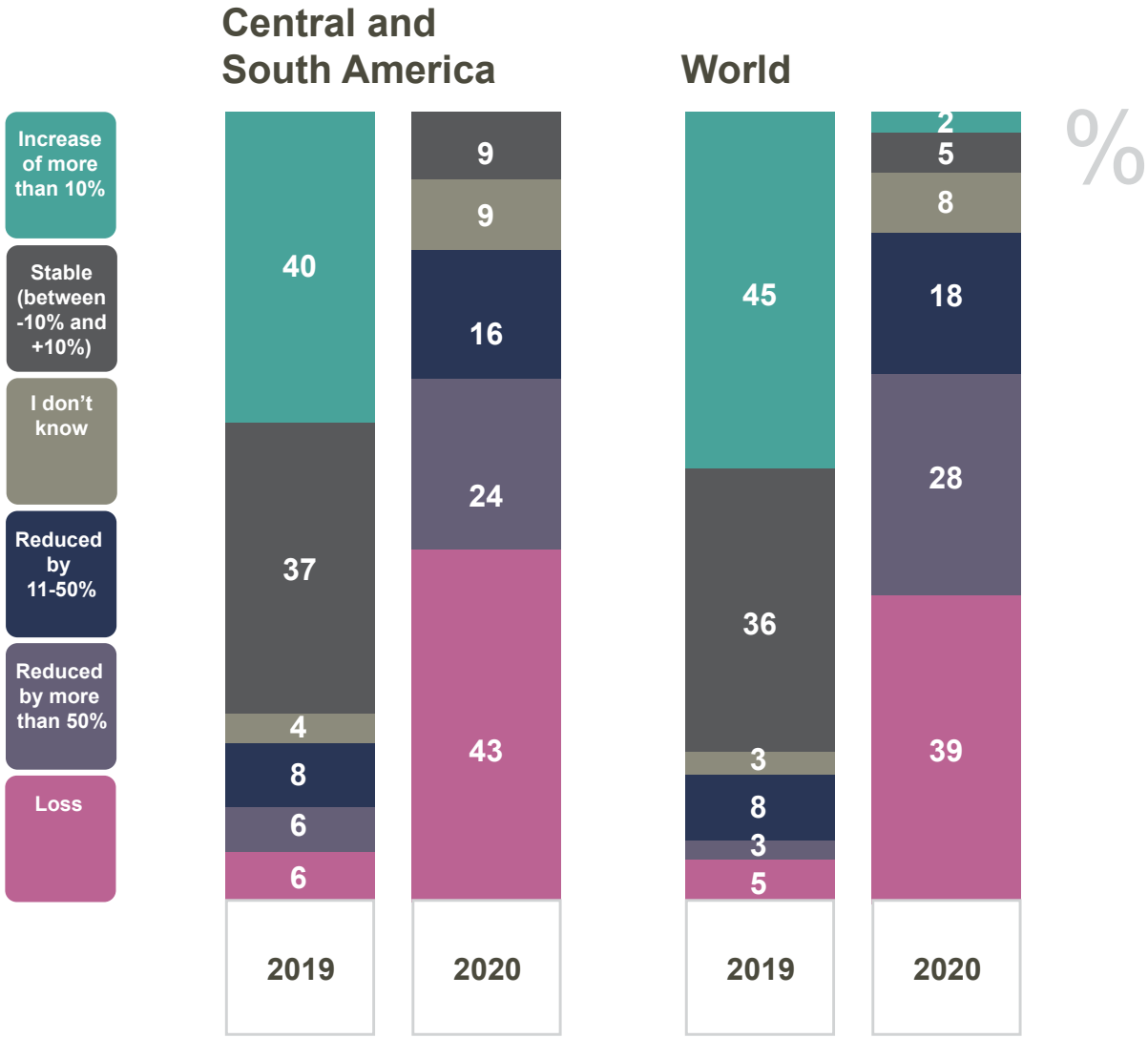


World



■ H1-2020 ■ all of 2020

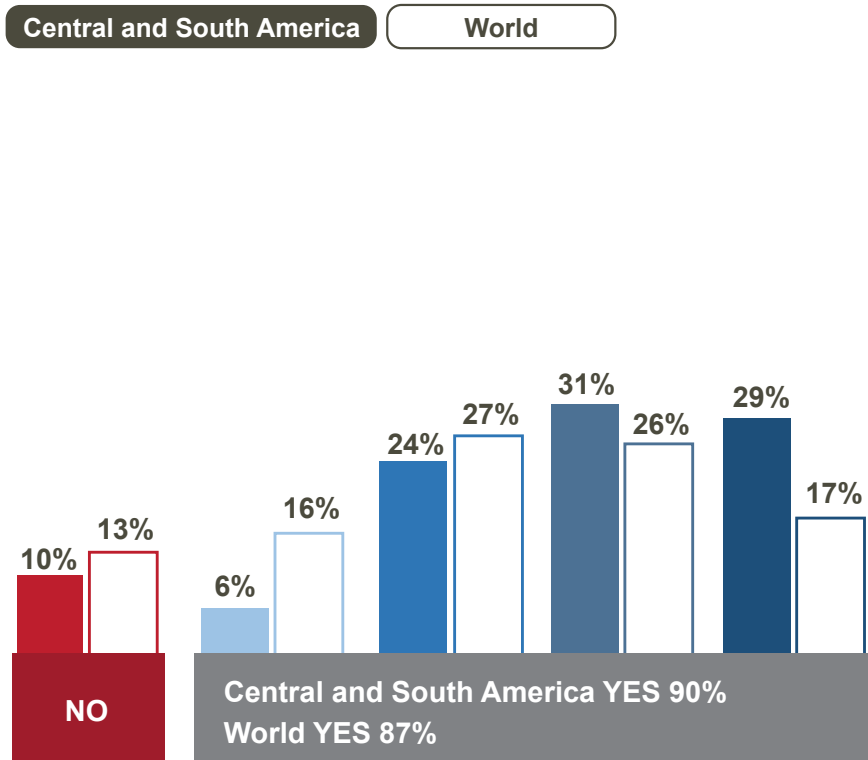
Operating profits Central and South America



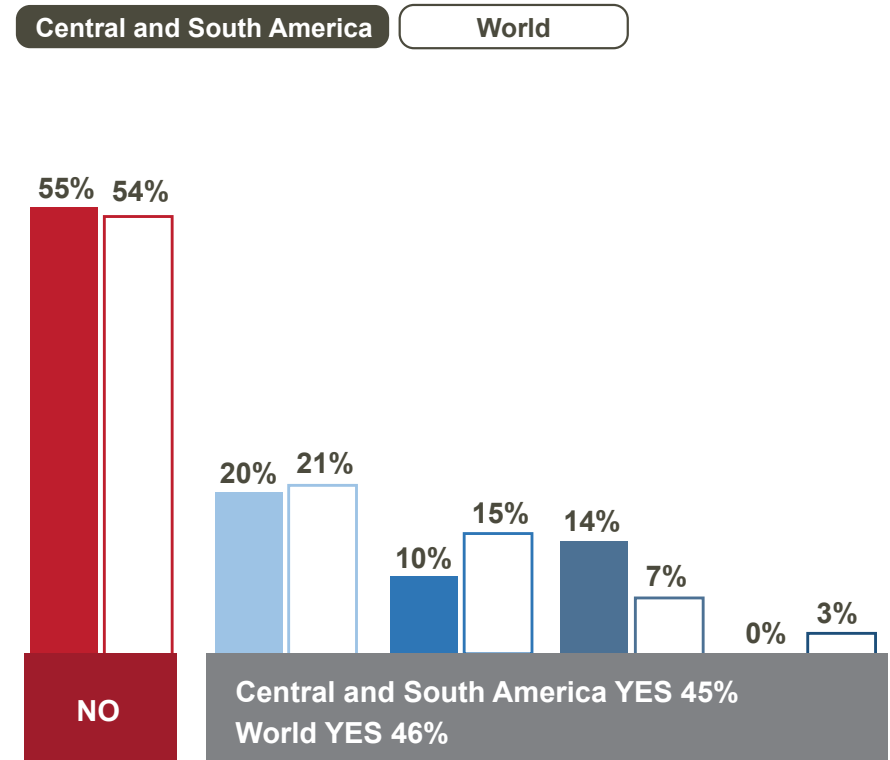
Cost Reductions - Public Financial Support Central and South America



Did your company implement cost reductions?



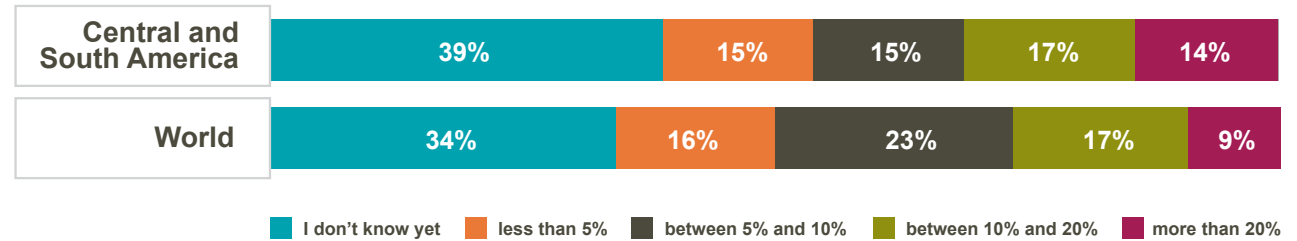
Did your company benefit from public financial support?



■ 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

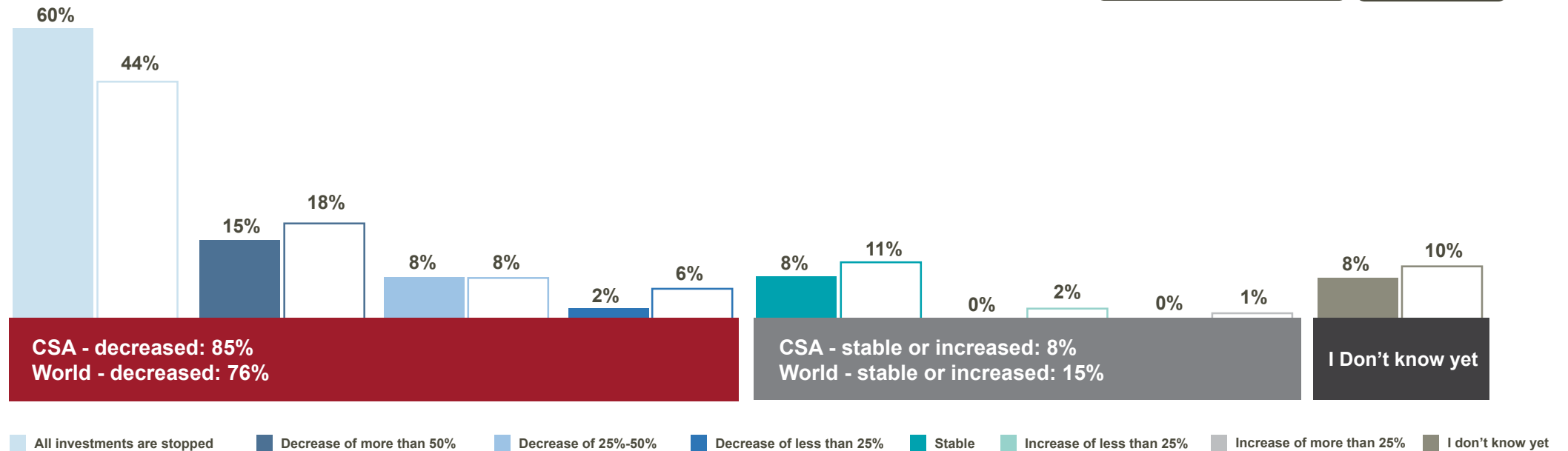
Investments Central and South America

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?

Central and South America World



Impact of Covid-19 on Digitalisation Central and South America



Central and South America

World

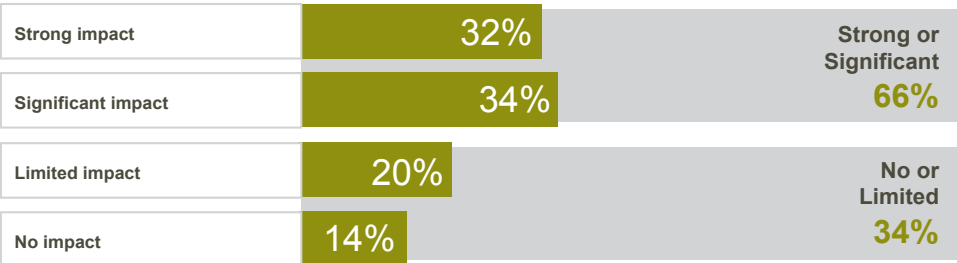
How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

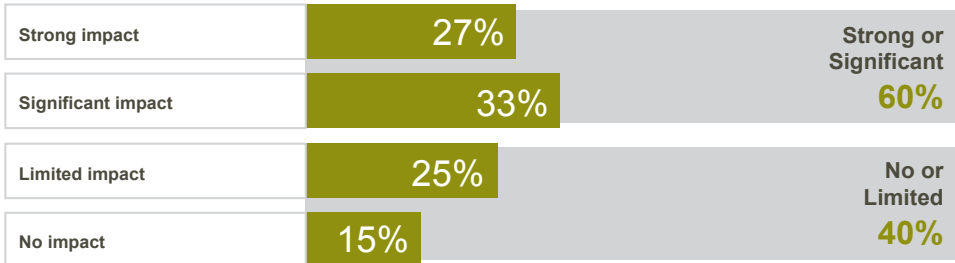


To what extent has Covid-19 impacted your company activities in digitalisation?

Central and South America



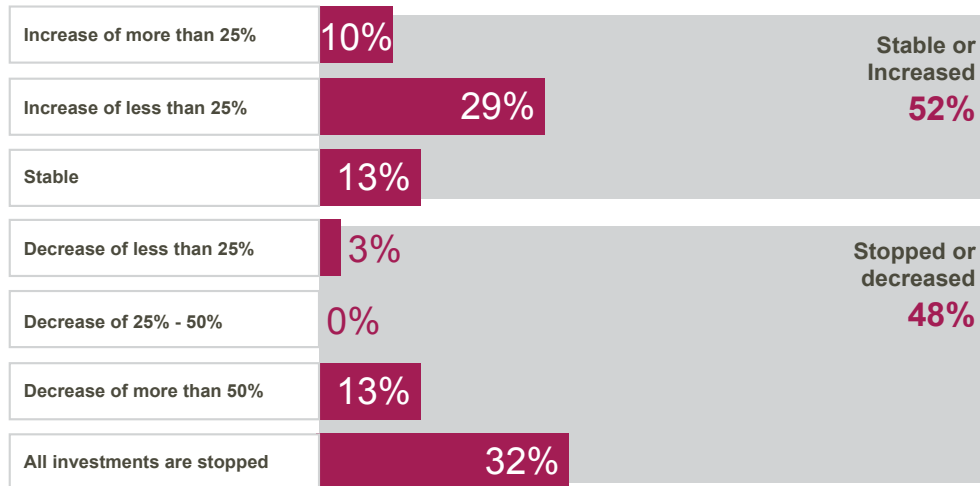
World



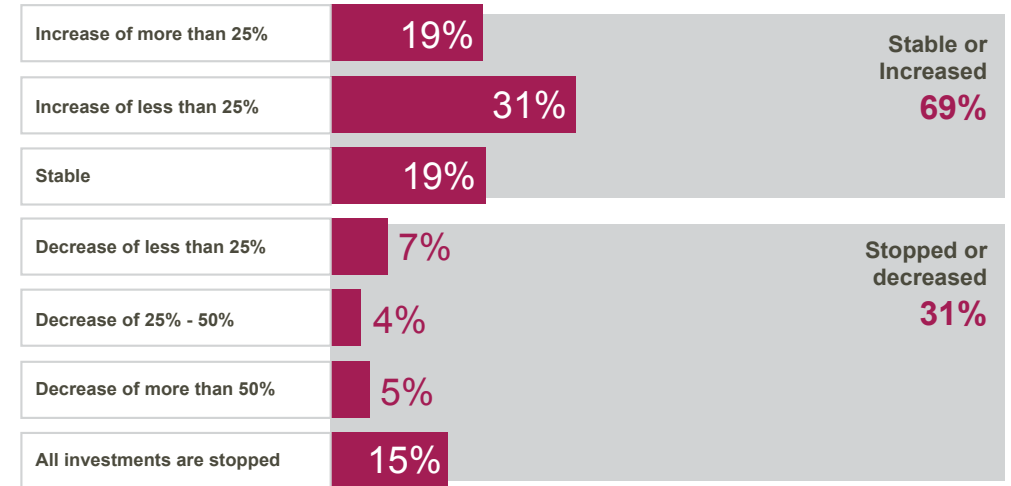


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?

Central and South America

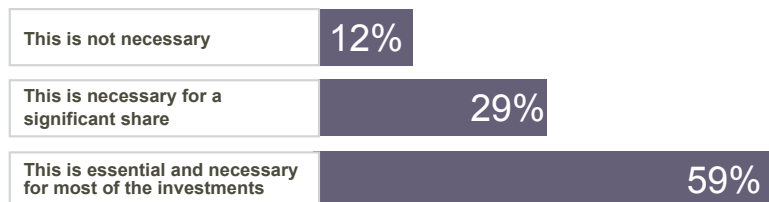


World

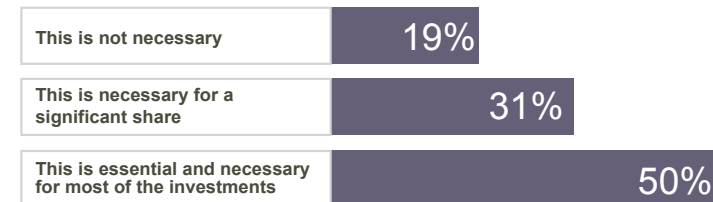


To what degree would you welcome some public investments in digitalisation?

Central and South America



World



Impact of Covid-19 on Diversity Central and South America



How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Central and South America

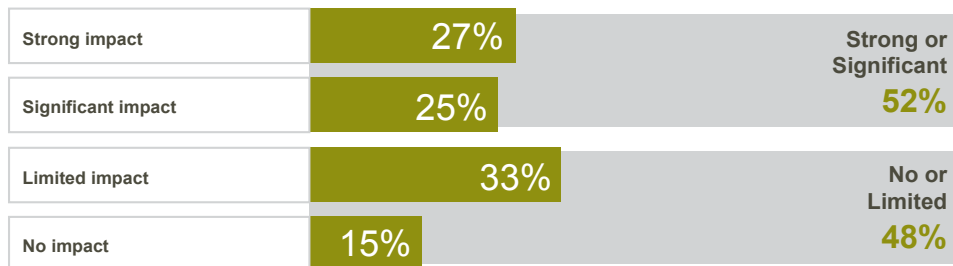


World

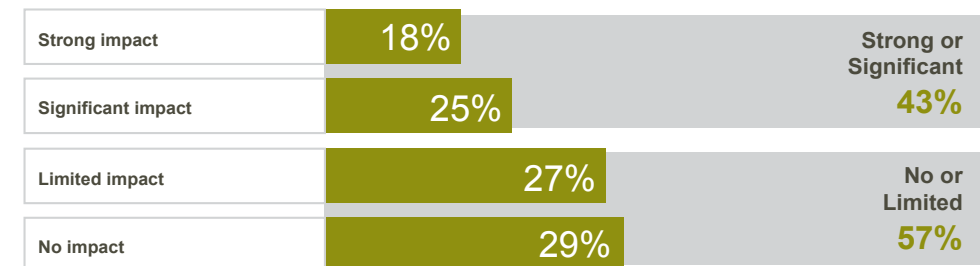


To what extent has Covid-19 impacted your company activities in diversity?

Central and South America



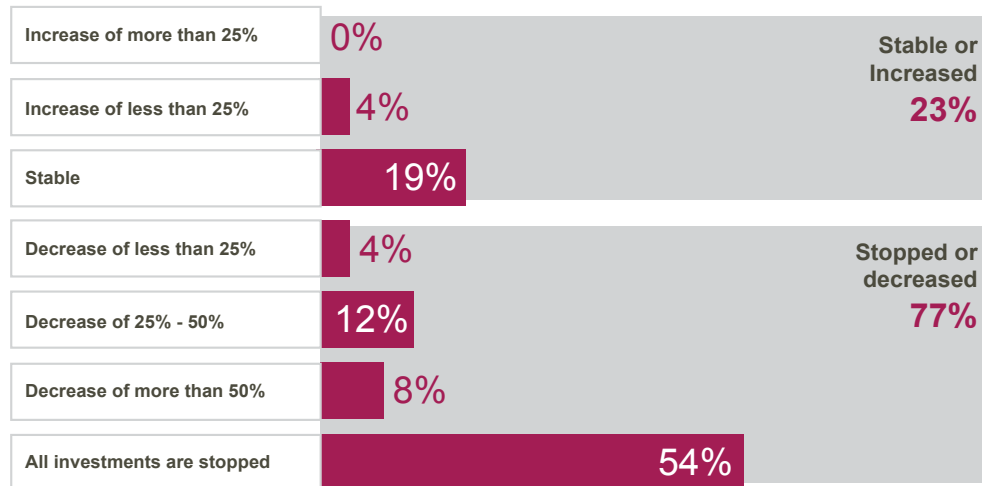
World



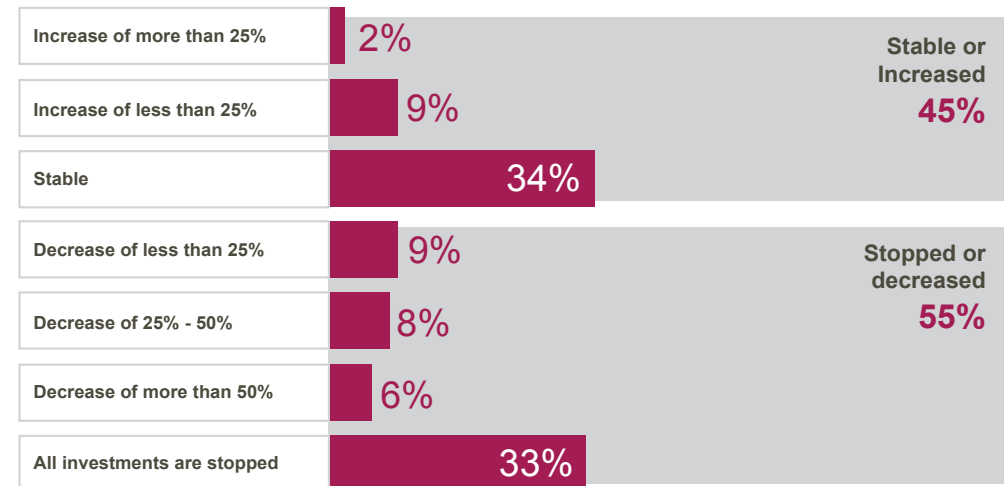


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?

Central and South America

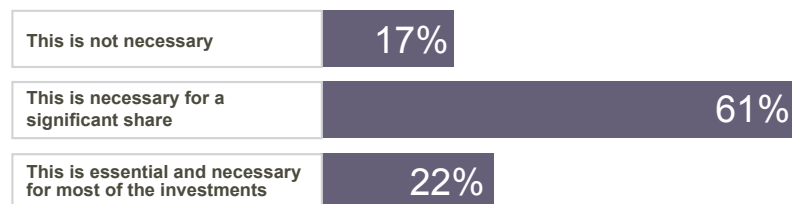


World

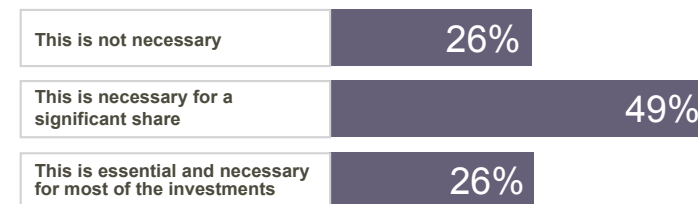


To what degree would you welcome some public investments in diversity?

Central and South America



World



Impact of Covid-19 on Sustainability Central and South America



How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Central and South America

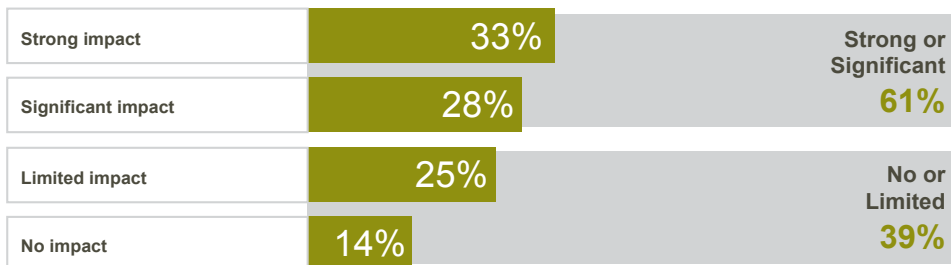


World

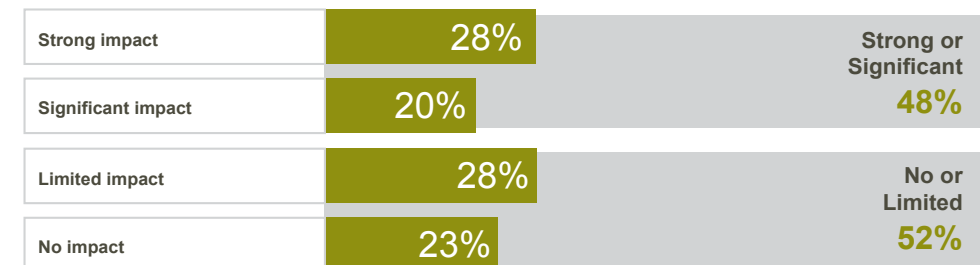


To what extent has Covid-19 impacted your company activities in sustainability?

Central and South America



World

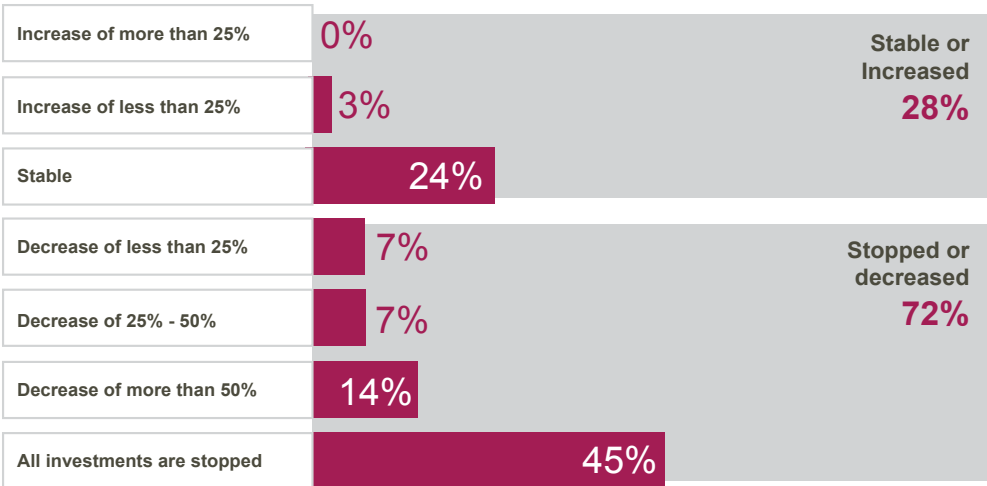


Impact of Covid-19 on Sustainability Central and South America

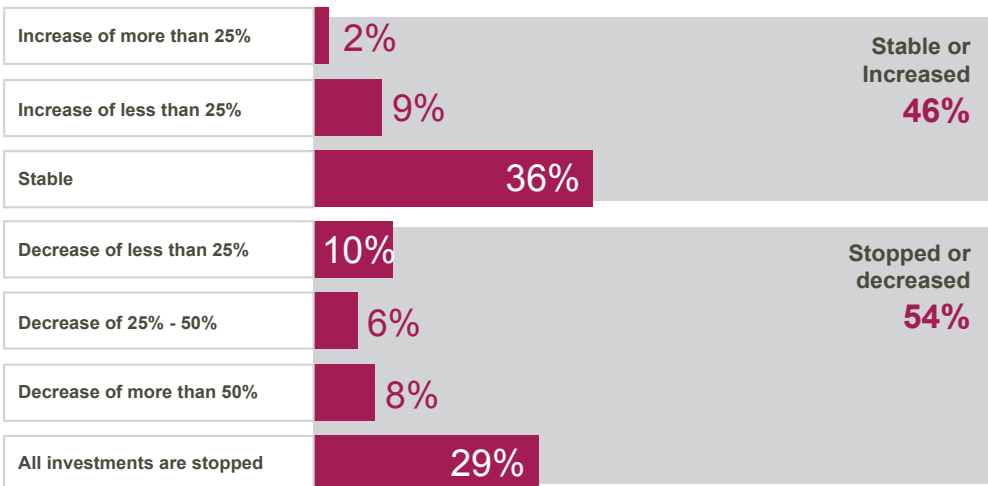


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?

Central and South America

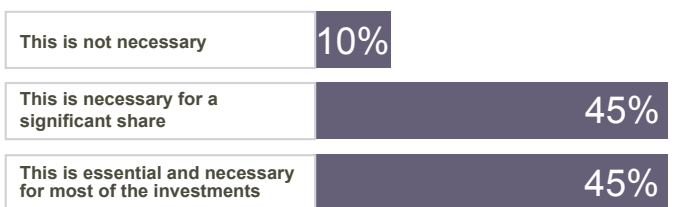


World

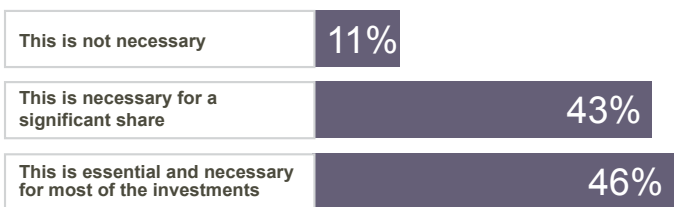


To what degree would you welcome some public investments in sustainability?

Central and South America



World



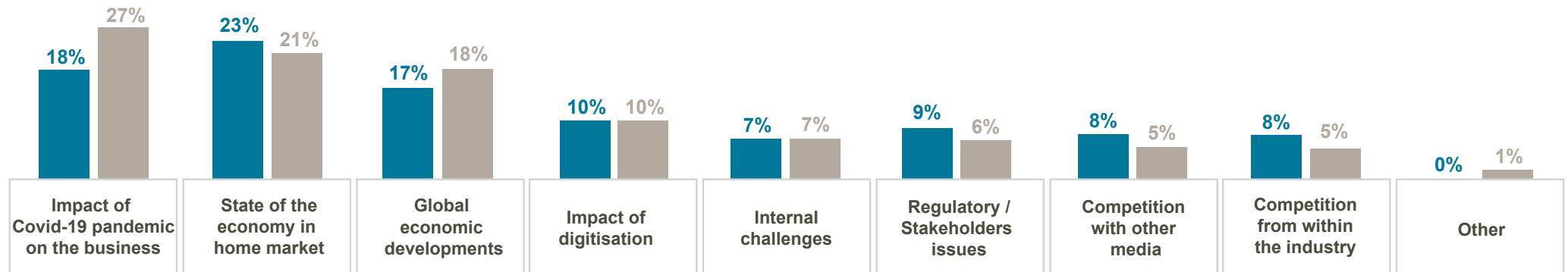
Most Important Business Issues - Format of Exhibitions - Central and South America



Most important business issues in the exhibition industry

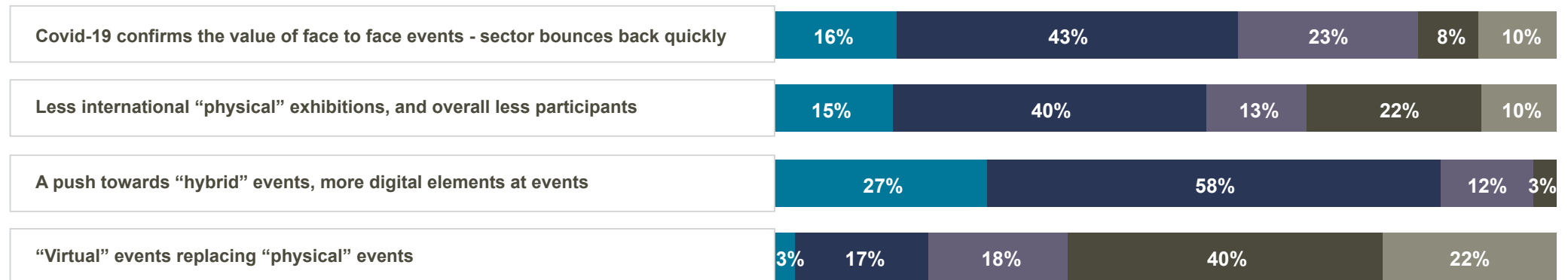
Central and South America

Global



Format of exhibitions in the coming years

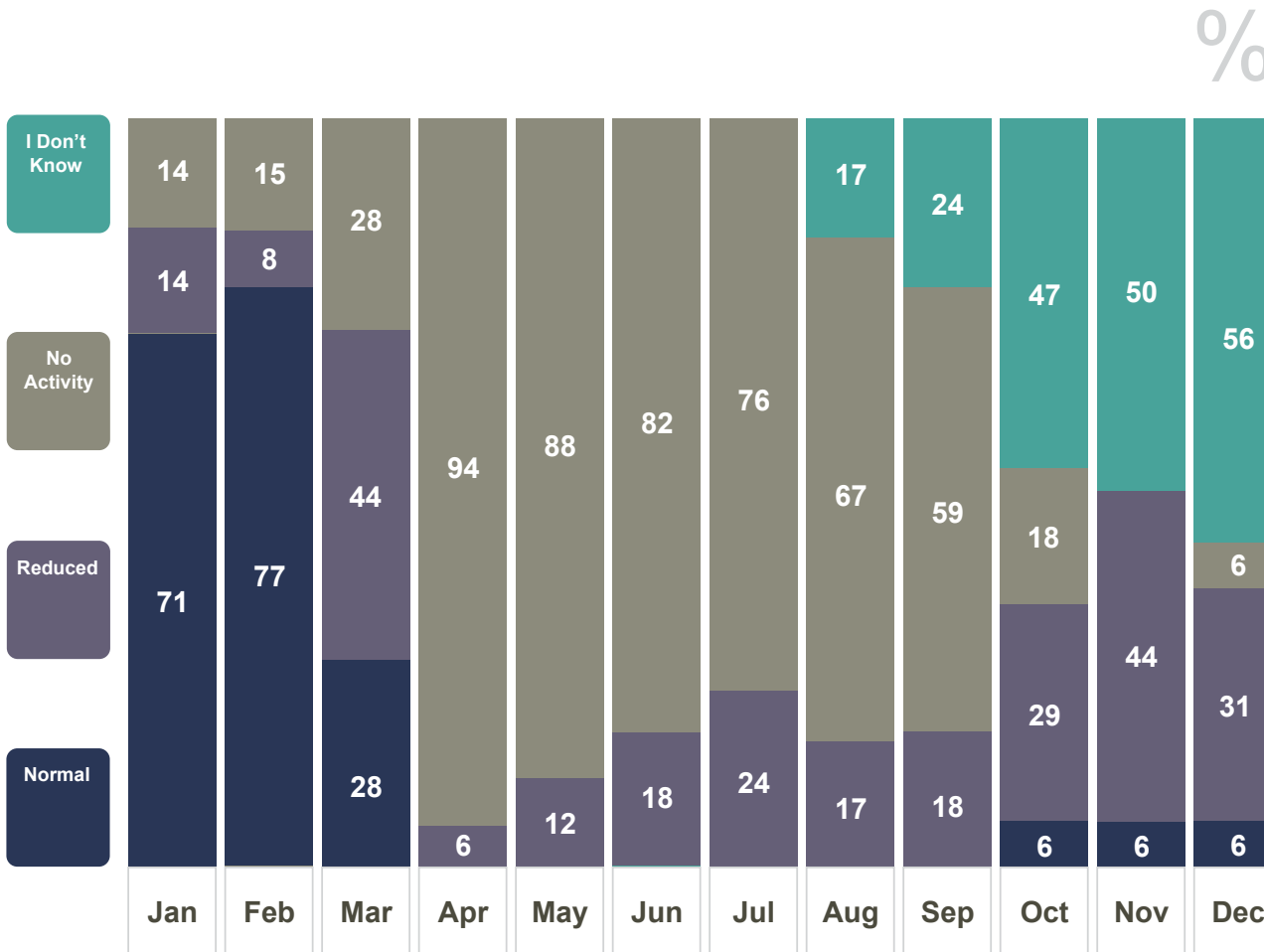
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not



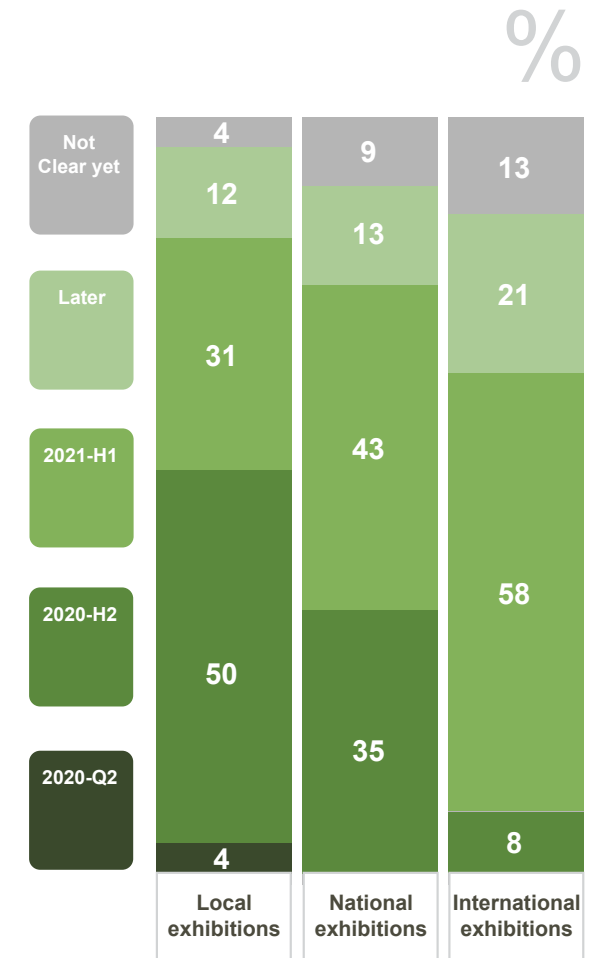
Detailed results for Argentina



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



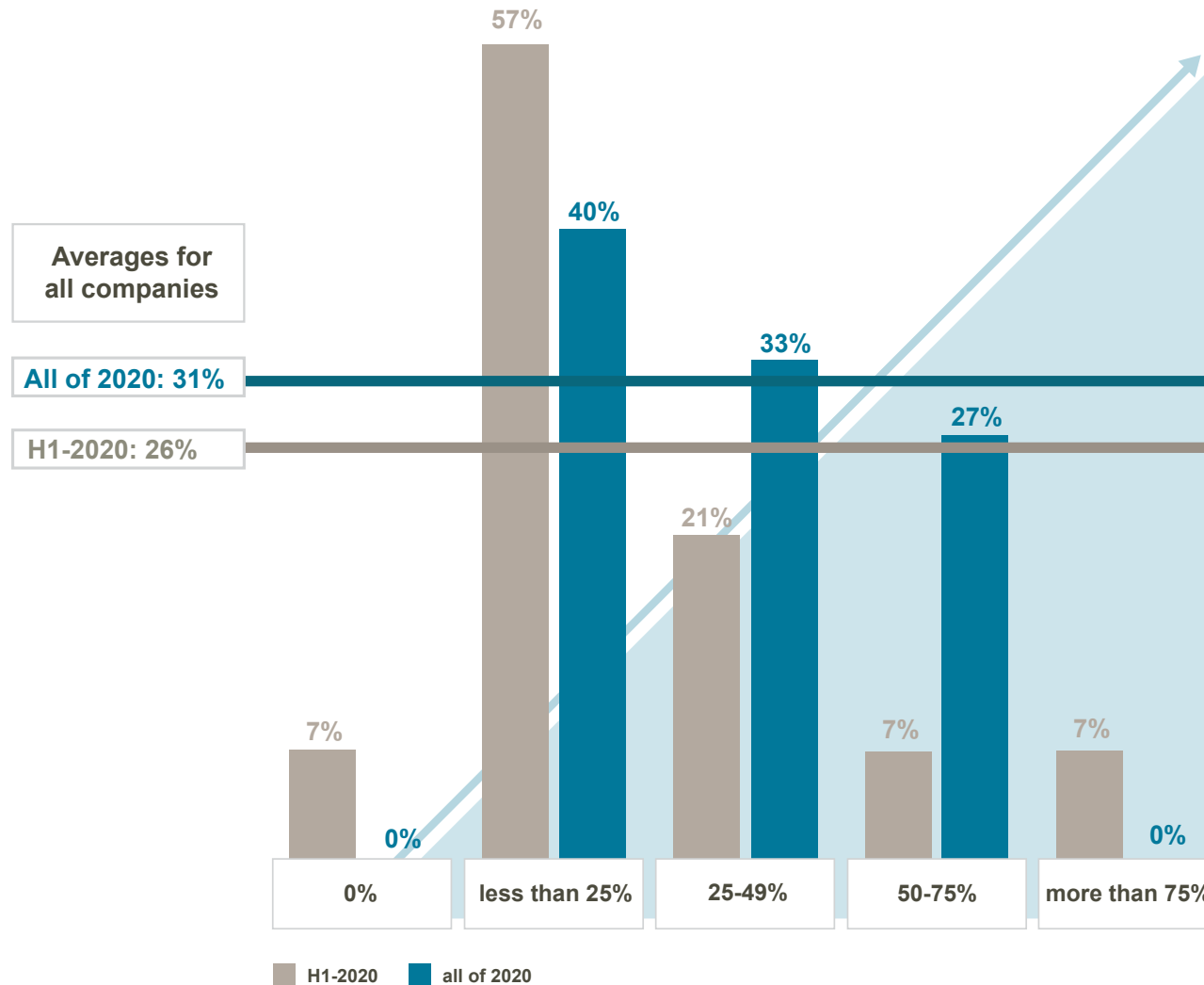
When do you believe exhibitions will open again in your city?



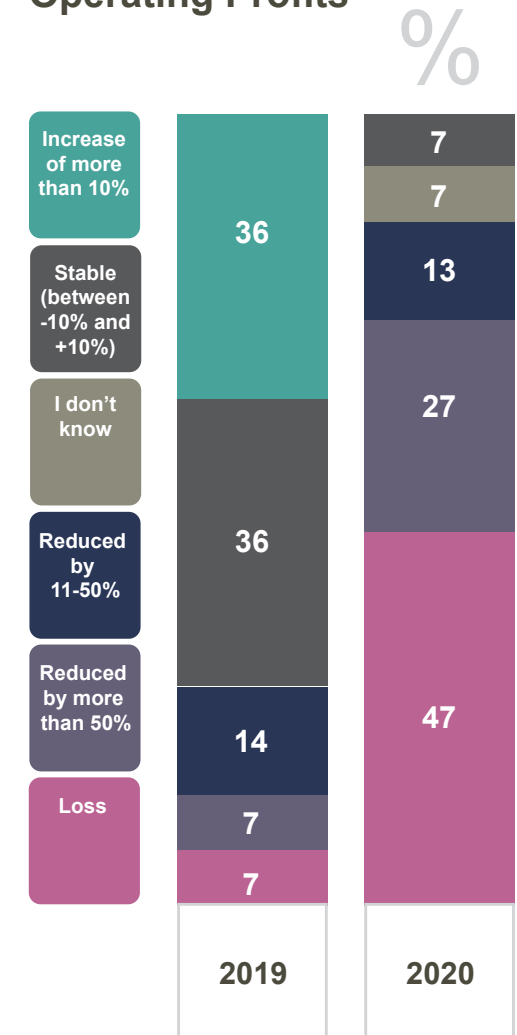
Detailed results for Argentina



Revenue compared to last year (2019)



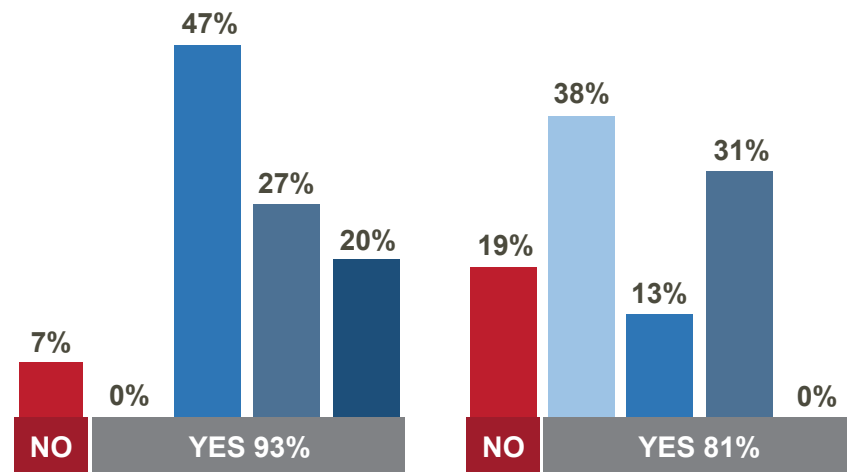
Operating Profits



Detailed results for Argentina

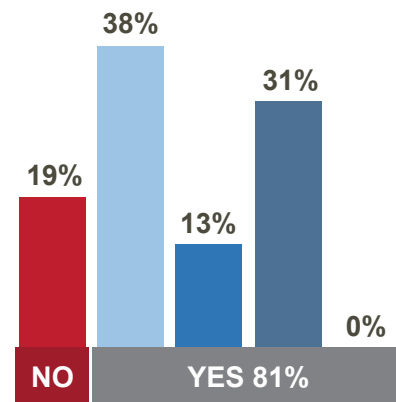


Did your company implement cost reductions?

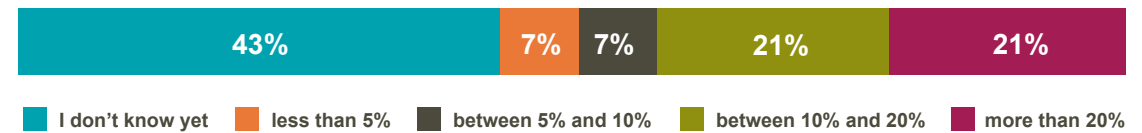


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

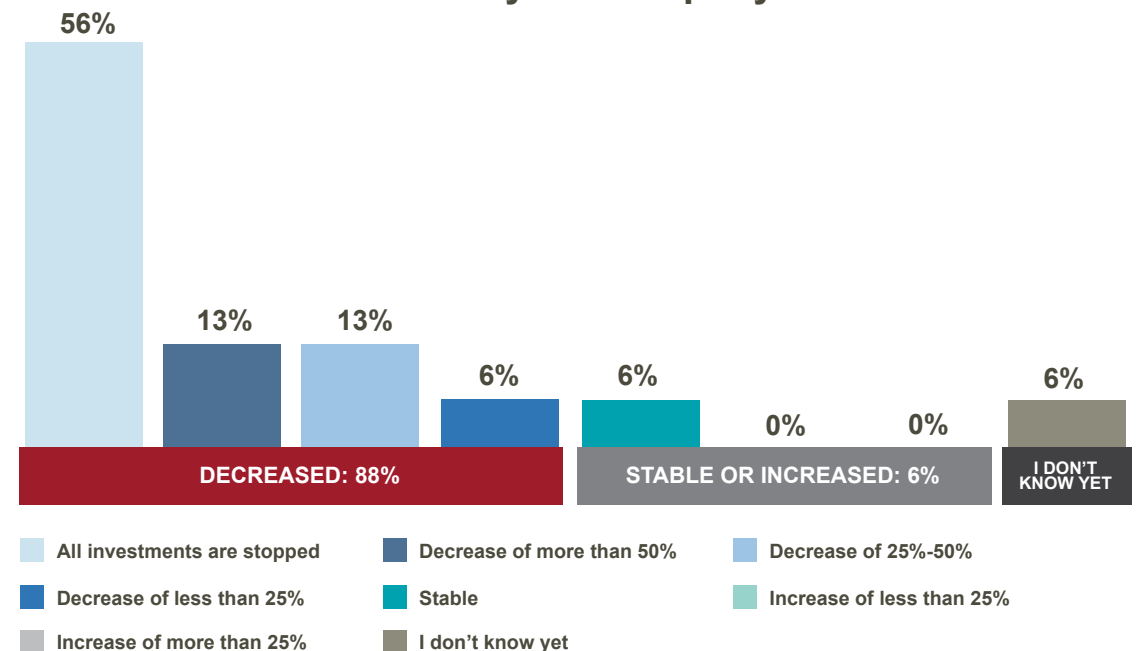
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





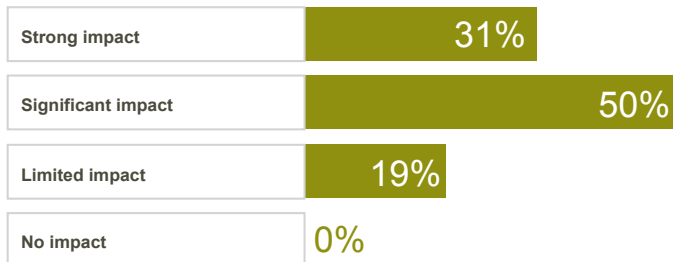
Digitalisation

How would you rate the transition of the exhibition industry?

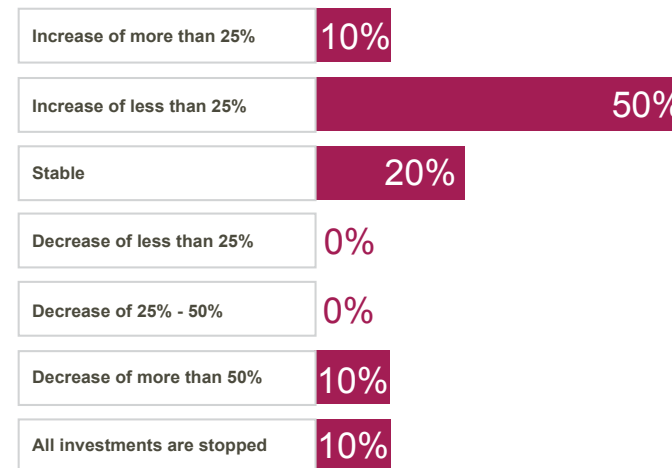
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



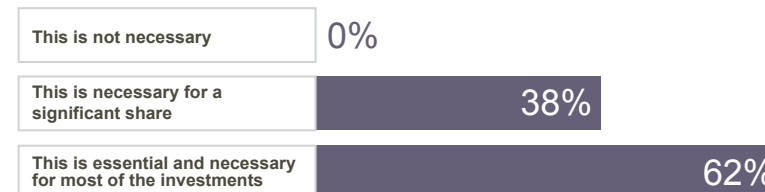
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





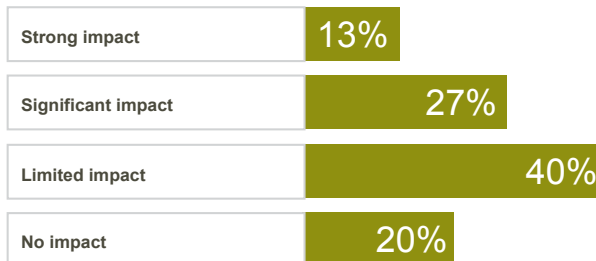
Diversity

How would you rate the transition of the exhibition industry?

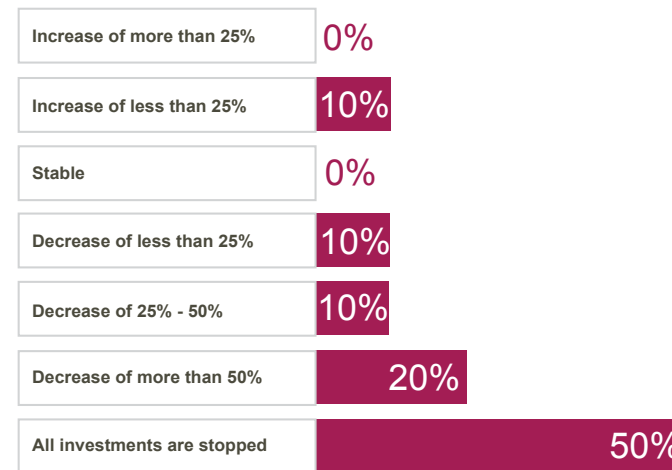
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



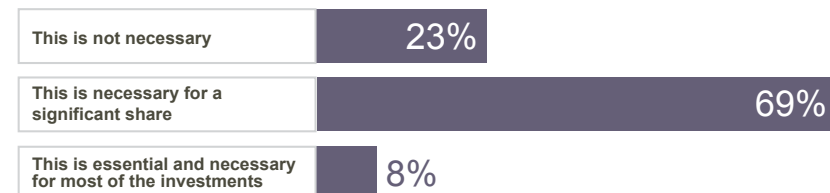
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





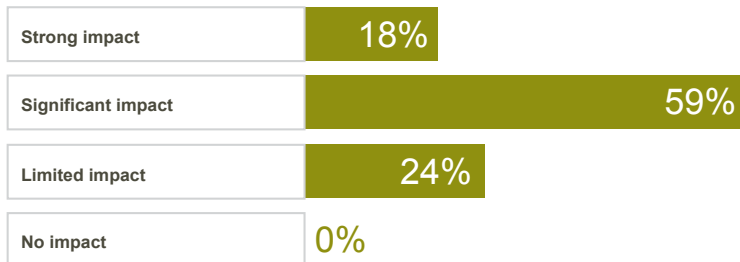
Sustainability

How would you rate the transition of the exhibition industry?

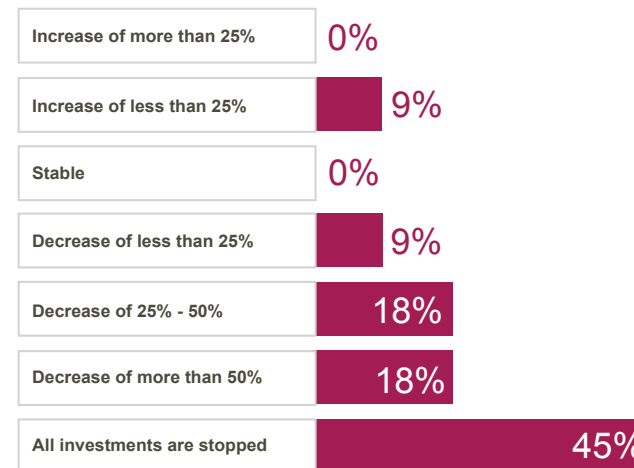
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



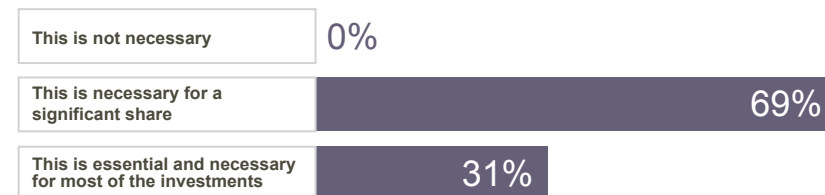
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

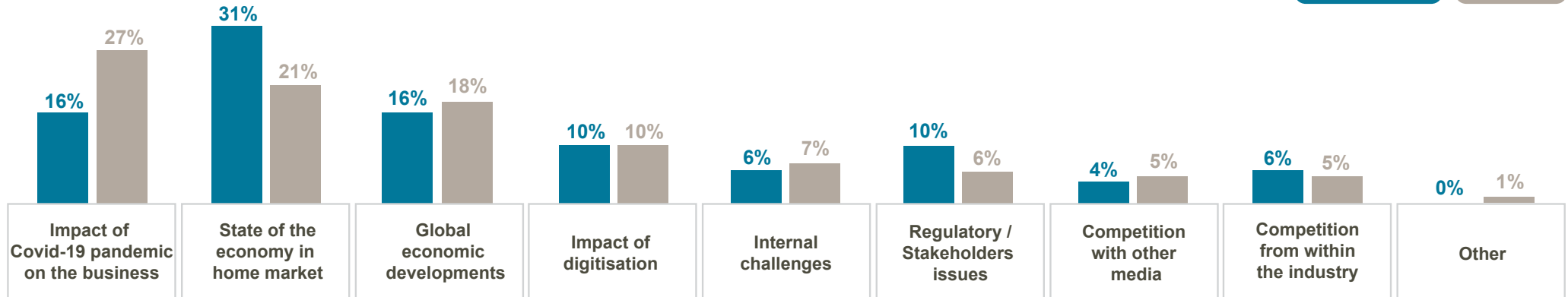




Most important business issues in the exhibition industry

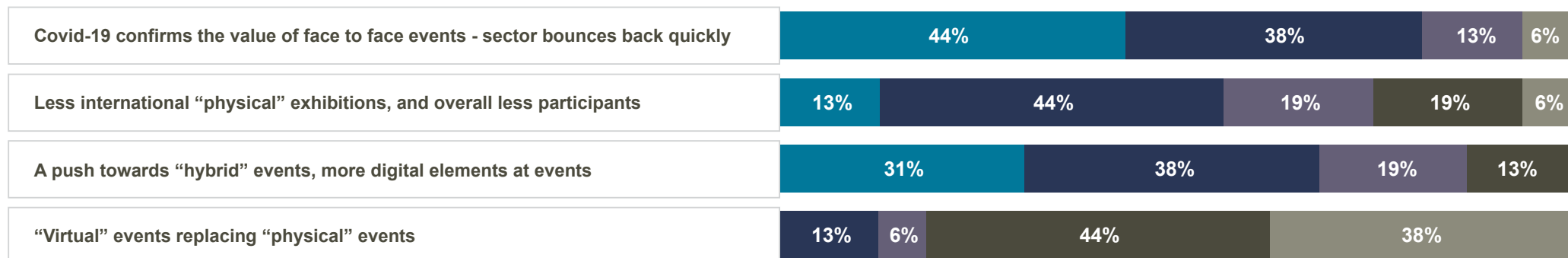
Argentina

Global



Format of exhibitions in the coming years

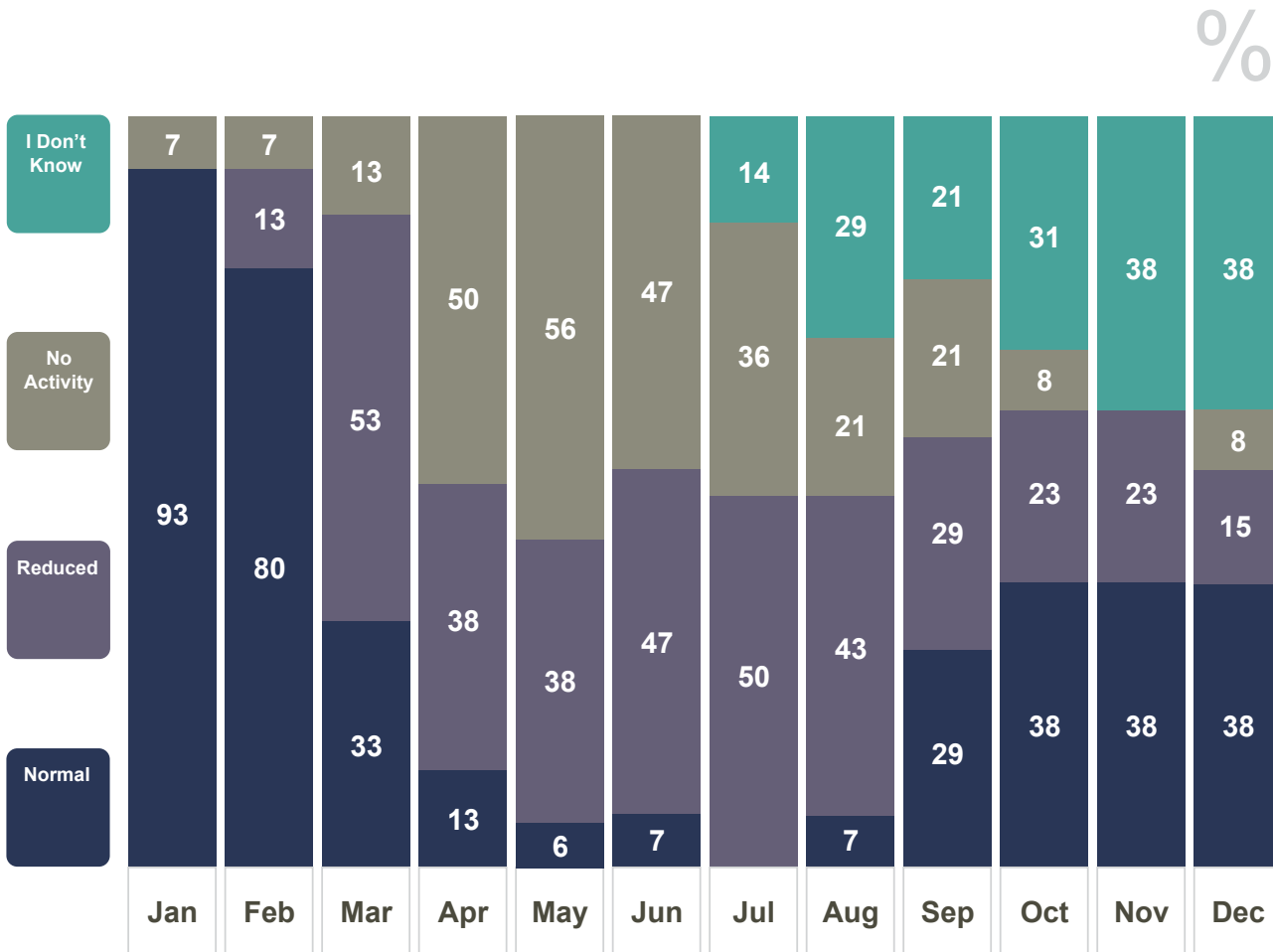
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not



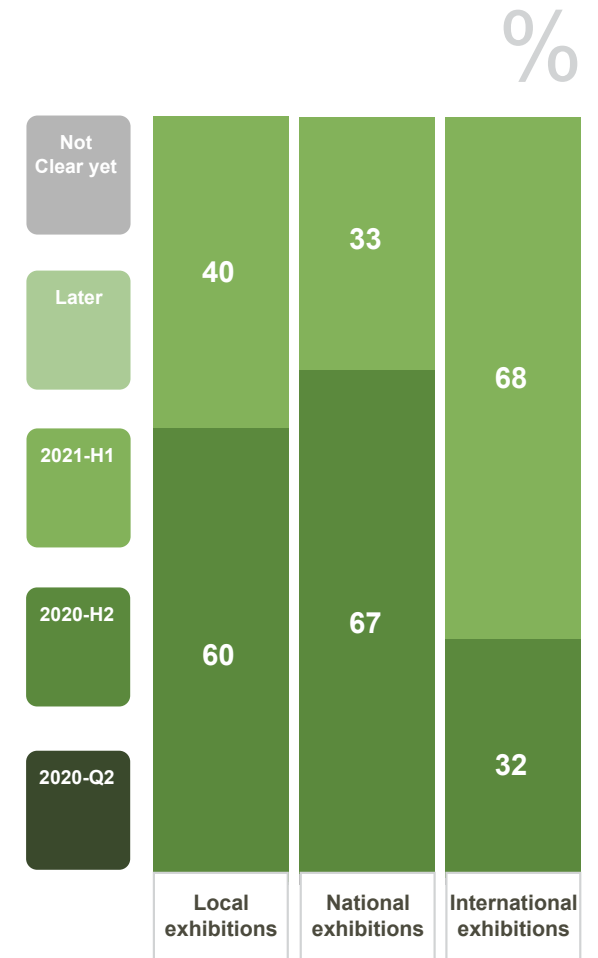
Detailed results for Brazil



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

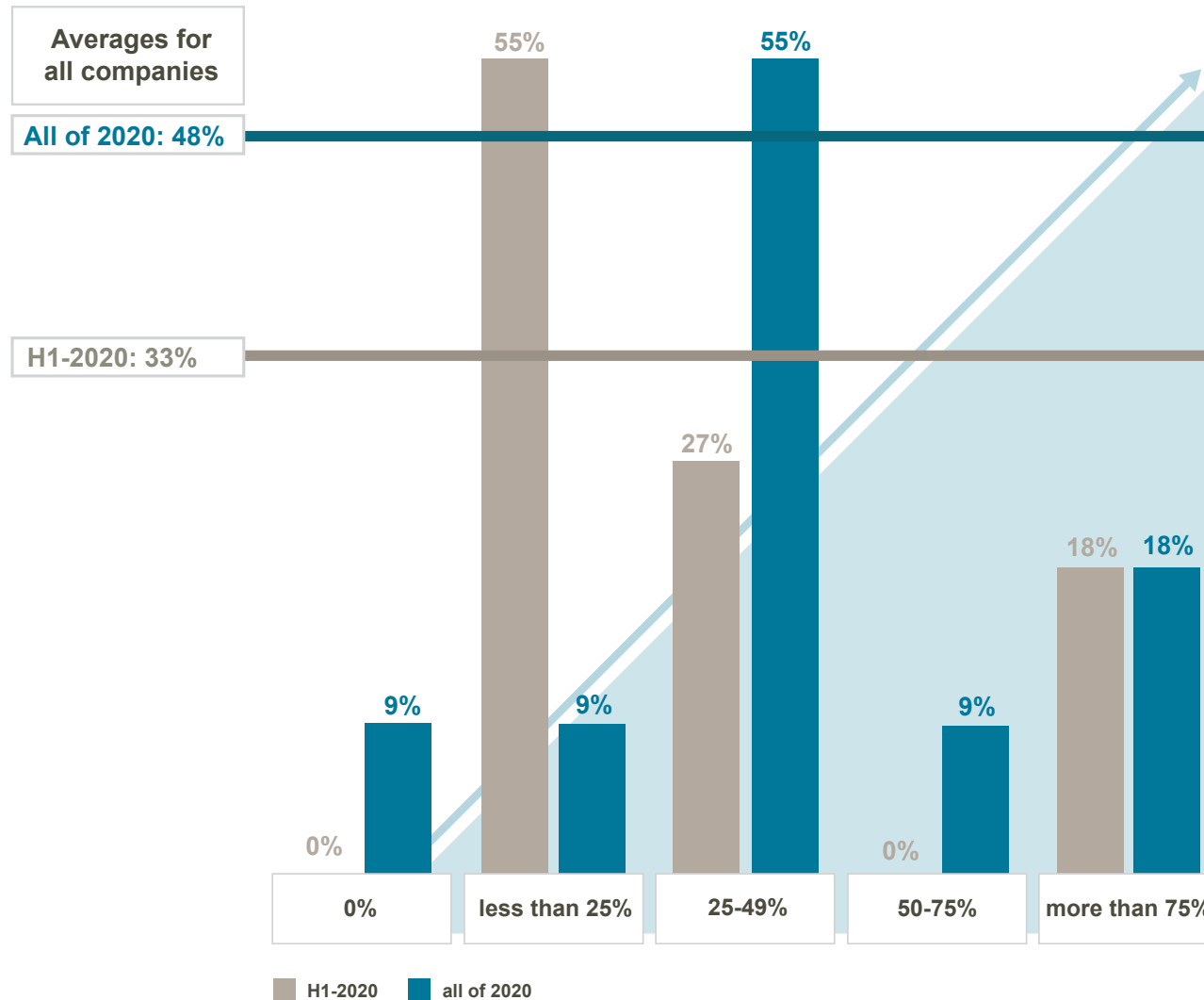


When do you believe exhibitions will open again in your city?

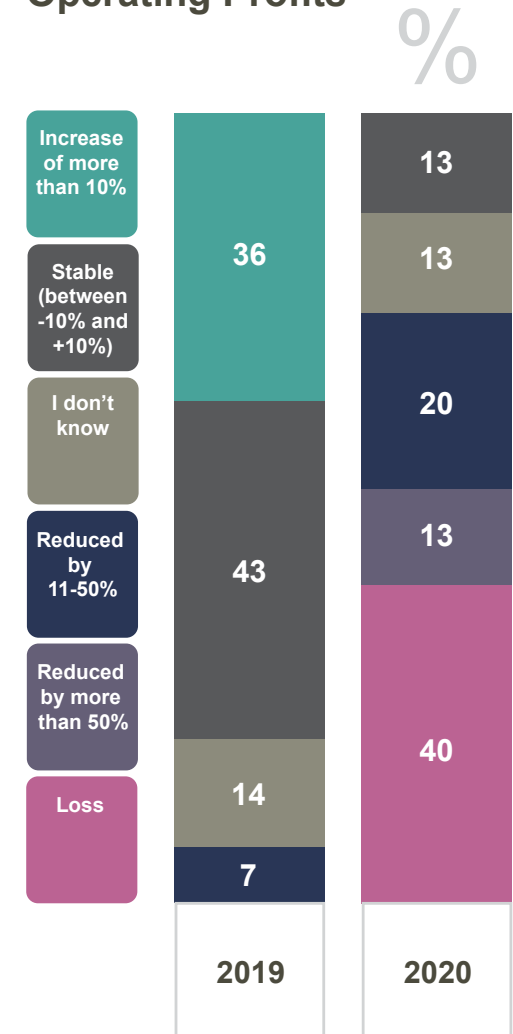




Revenue compared to last year (2019)



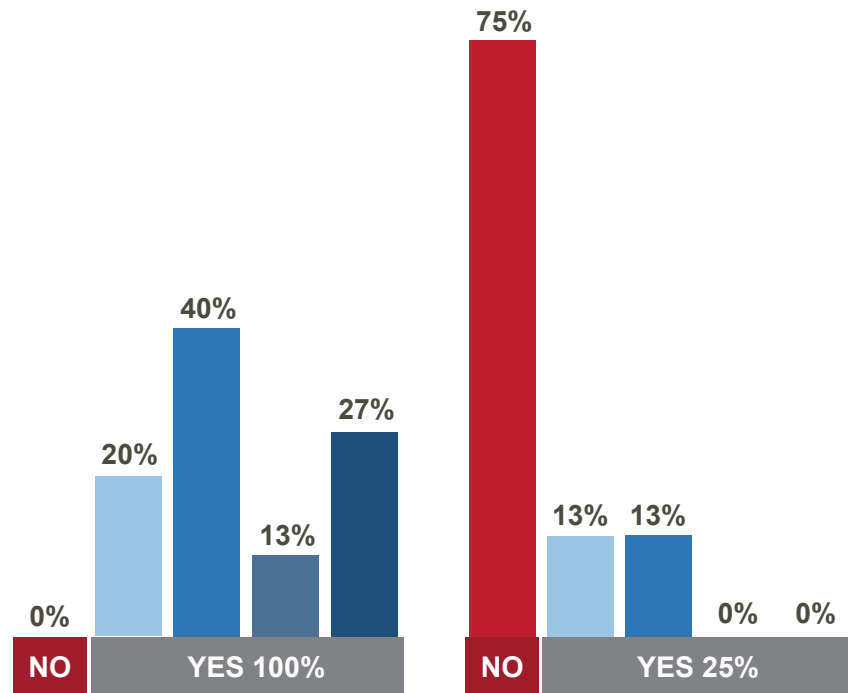
Operating Profits



Detailed results for Brazil

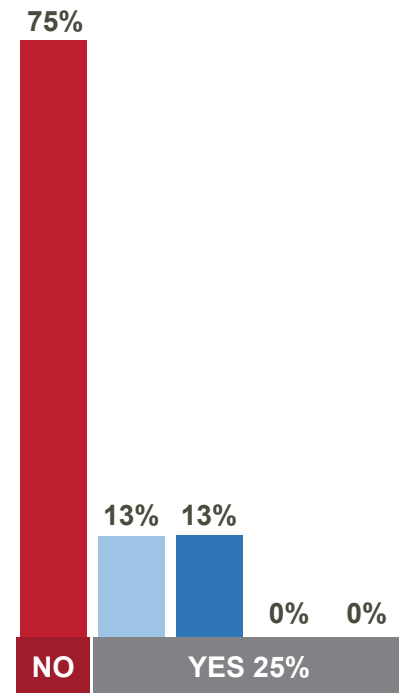


Did your company implement cost reductions?

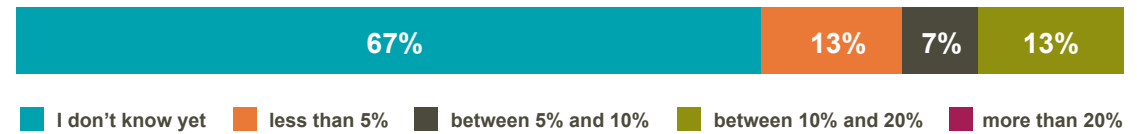


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

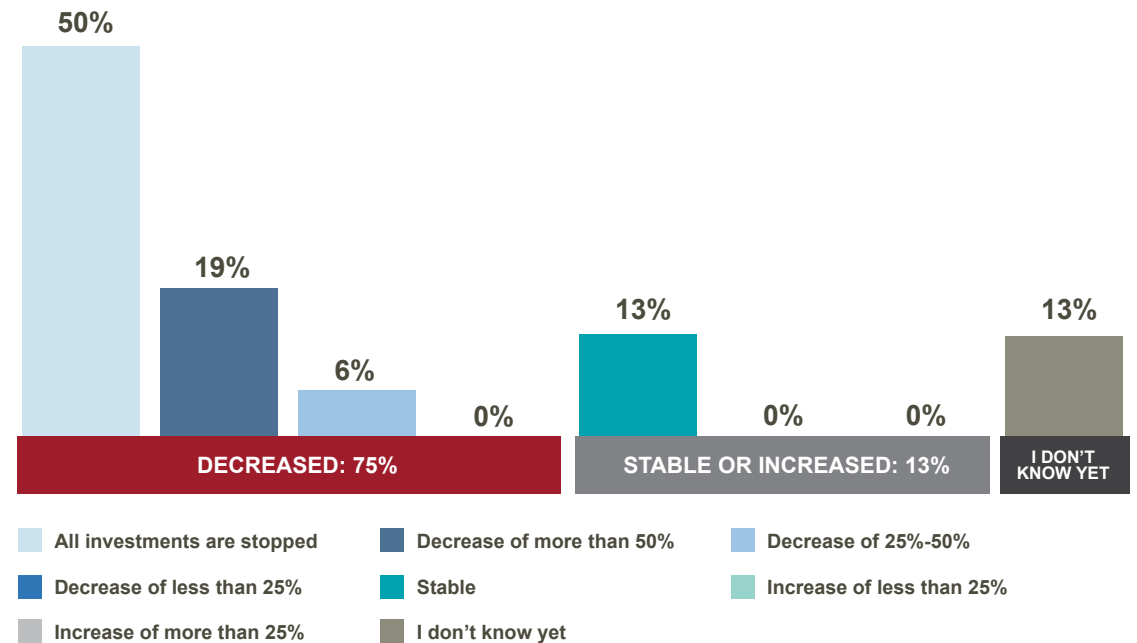
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





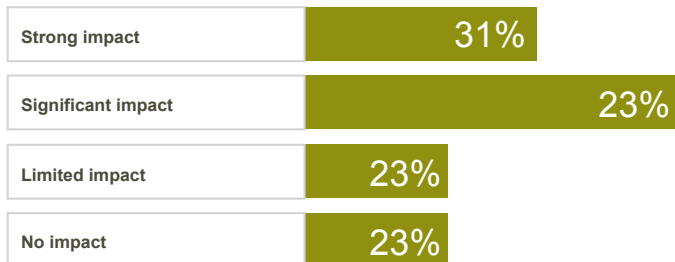
Digitalisation

How would you rate the transition of the exhibition industry?

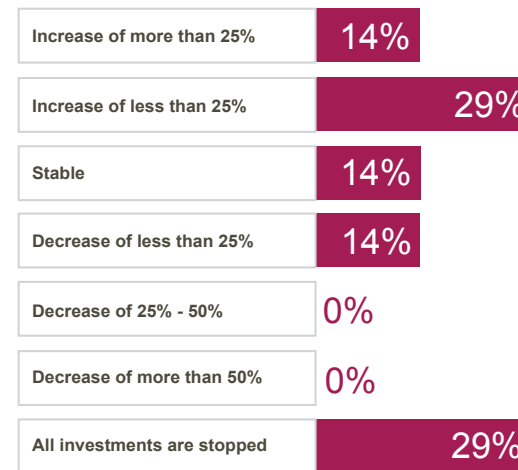
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





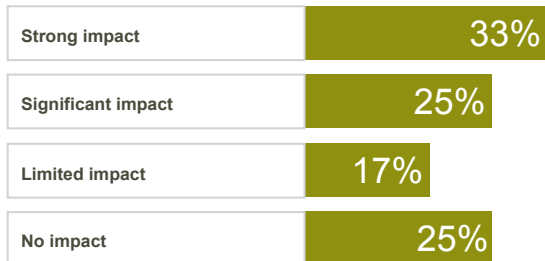
Diversity

How would you rate the transition of the exhibition industry?

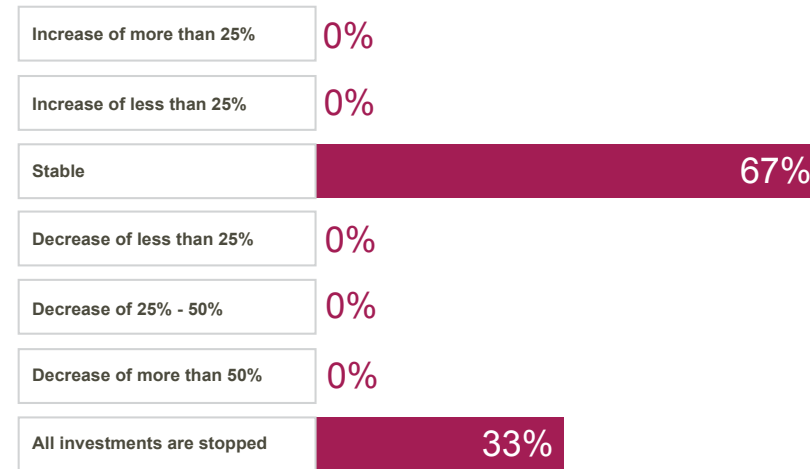
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





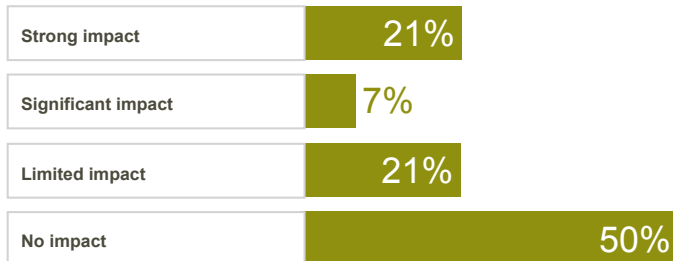
Sustainability

How would you rate the transition of the exhibition industry?

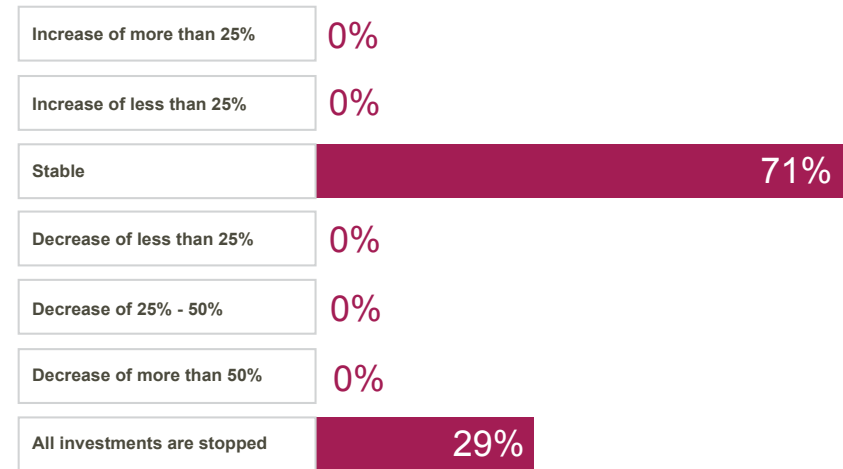
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



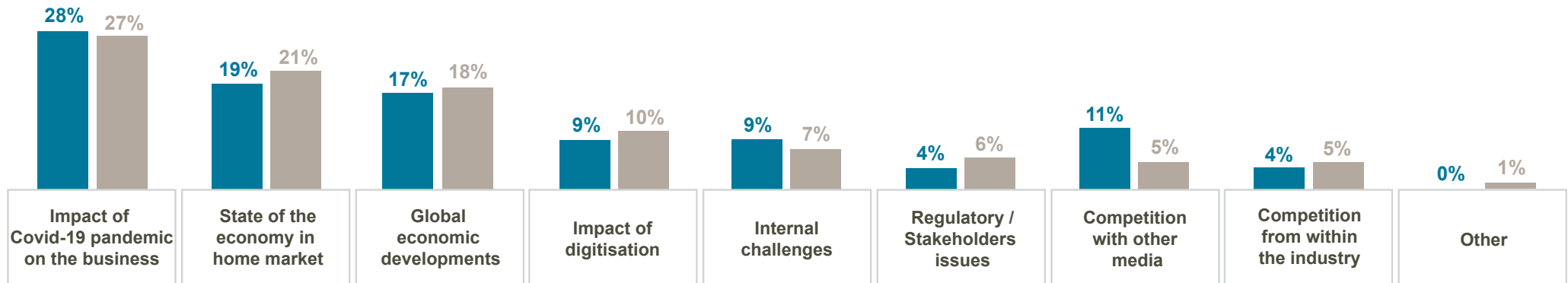
To what degree would you welcome some public investments in sustainability?





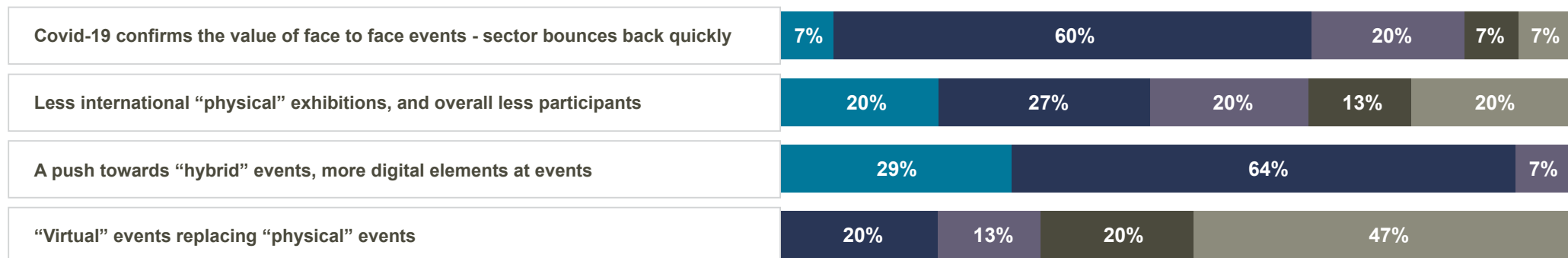
Most important business issues in the exhibition industry

Brazil Global



Format of exhibitions in the coming years

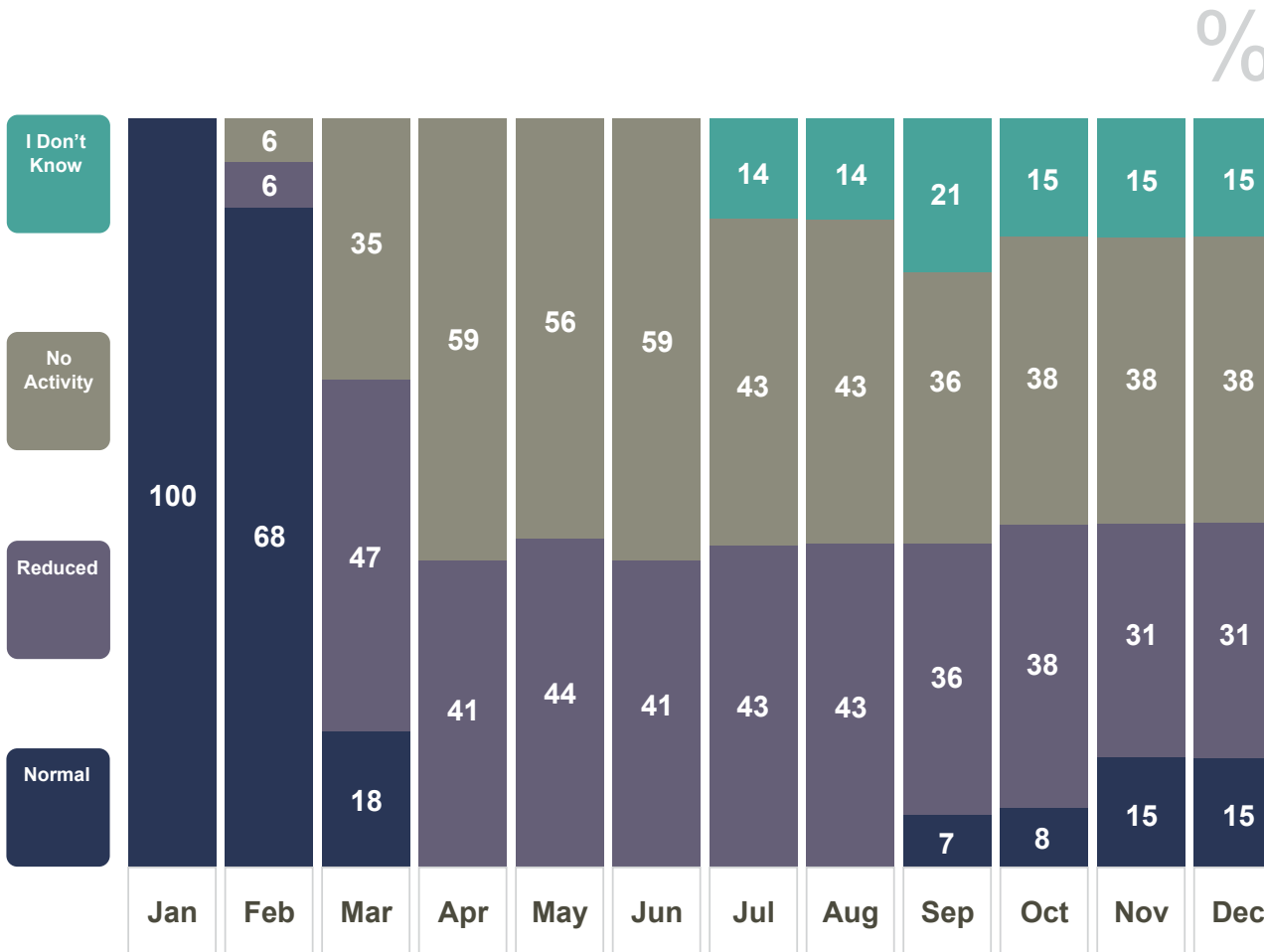
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not



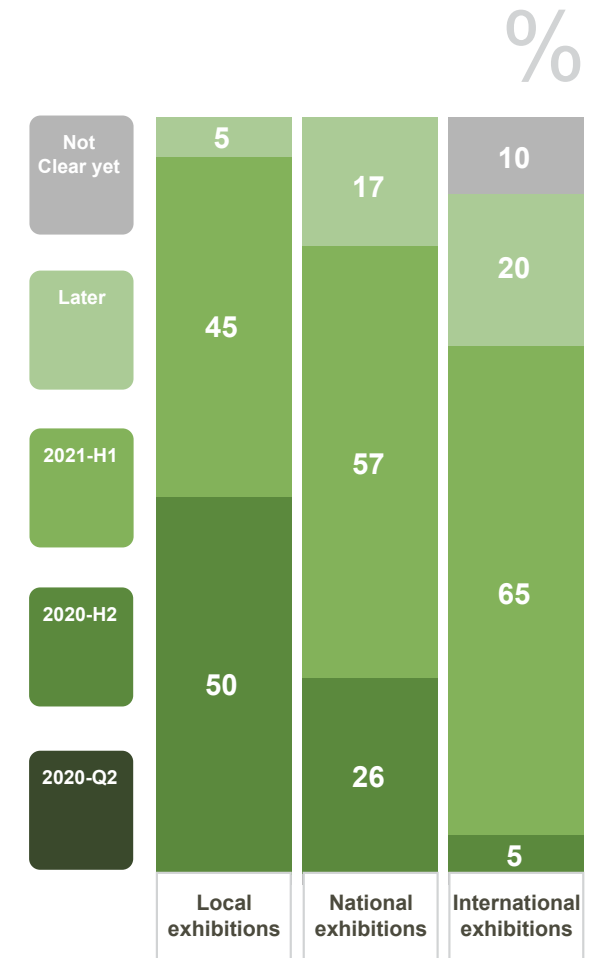
Detailed results for Colombia



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

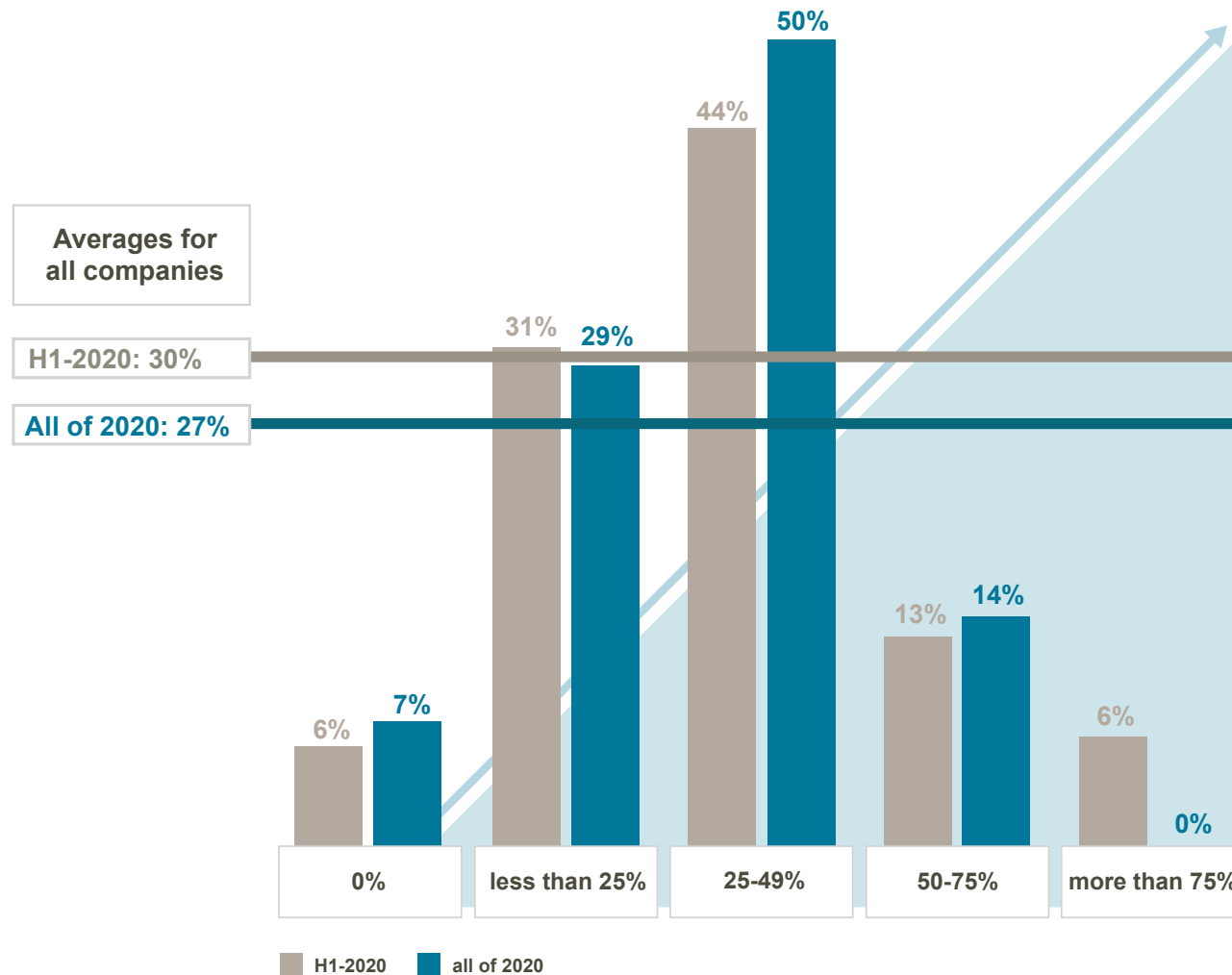


When do you believe exhibitions will open again in your city?

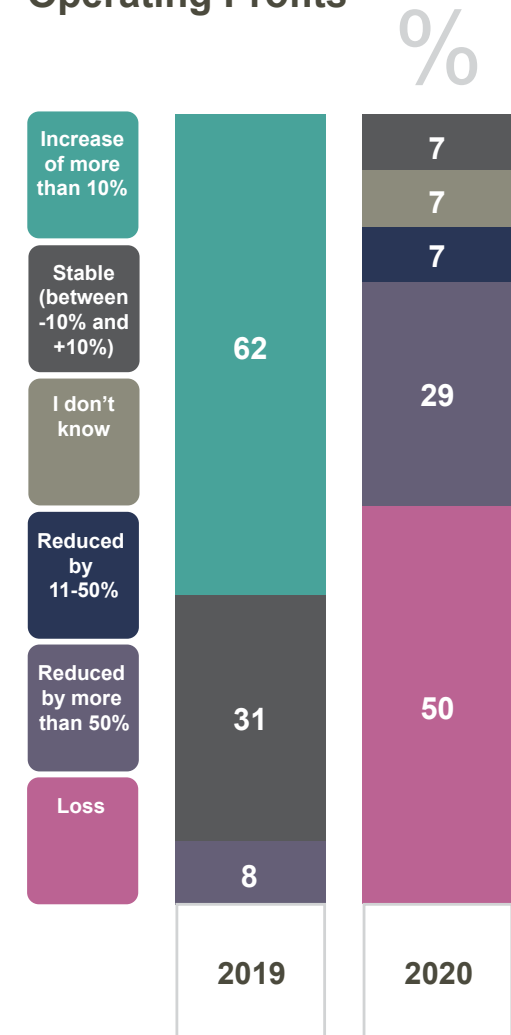




Revenue compared to last year (2019)

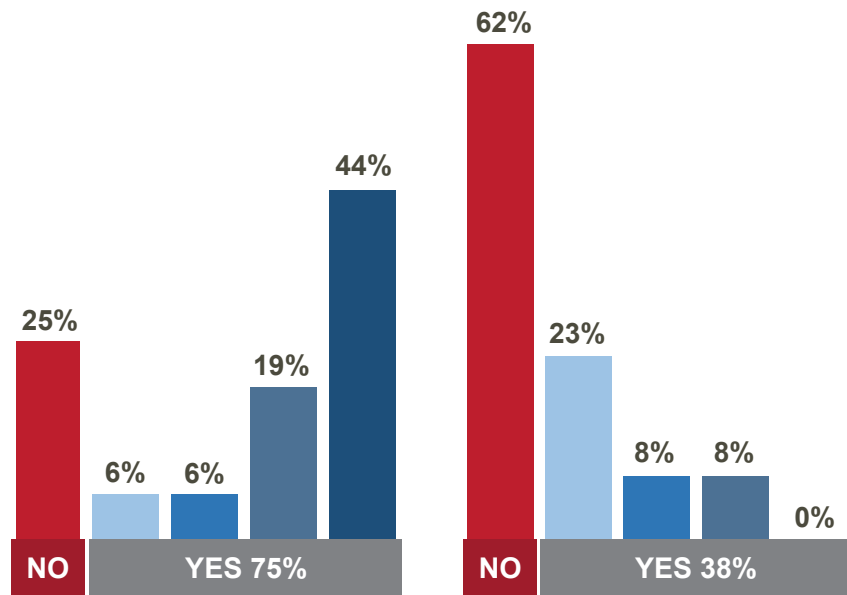


Operating Profits



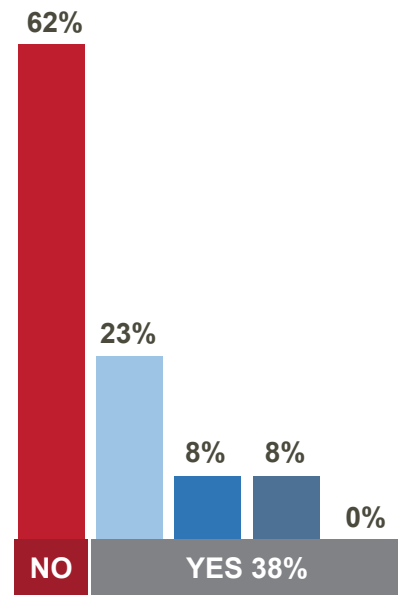


Did your company implement cost reductions?

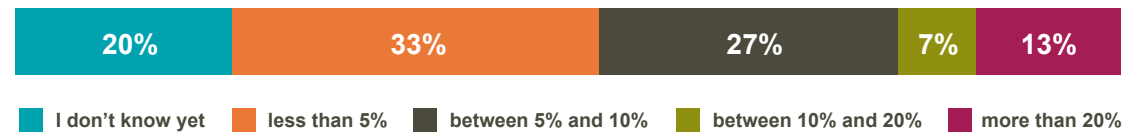


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

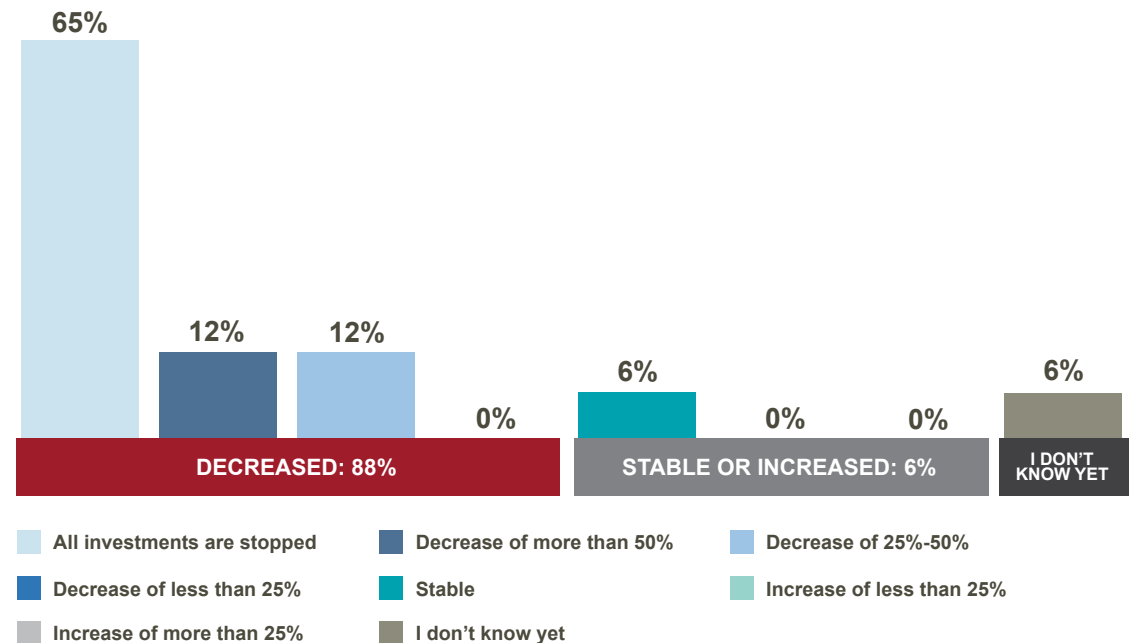
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





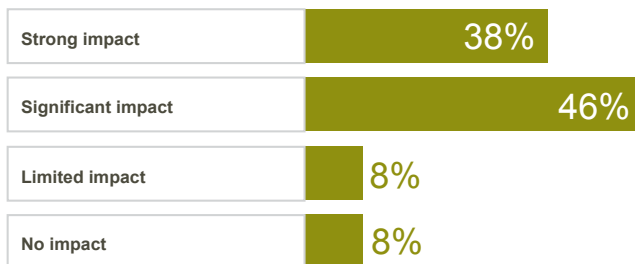
Digitalisation

How would you rate the transition of the exhibition industry?

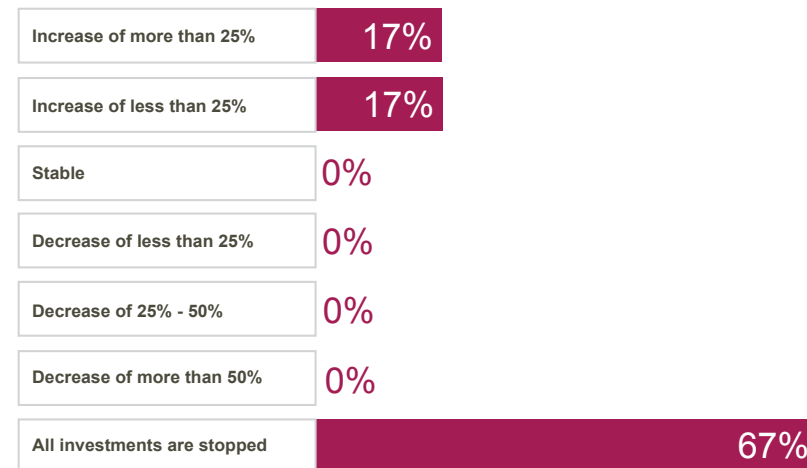
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



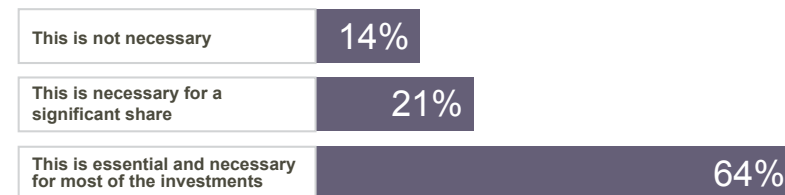
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





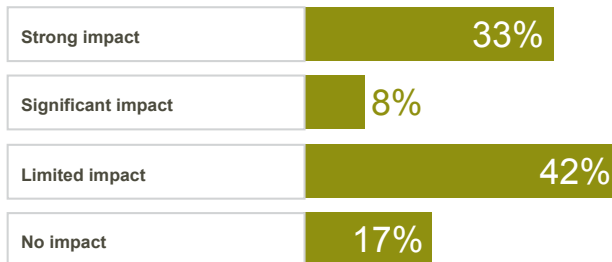
Diversity

How would you rate the transition of the exhibition industry?

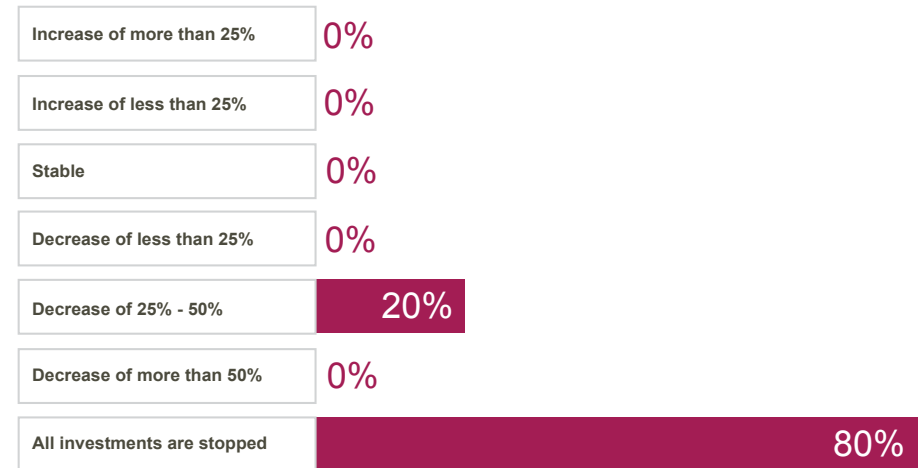
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



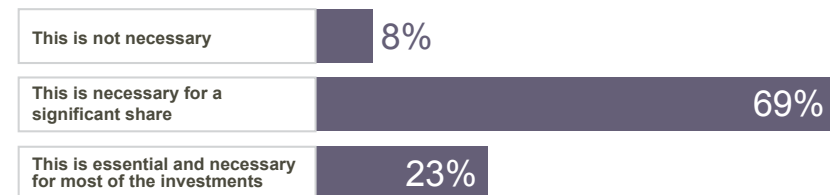
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





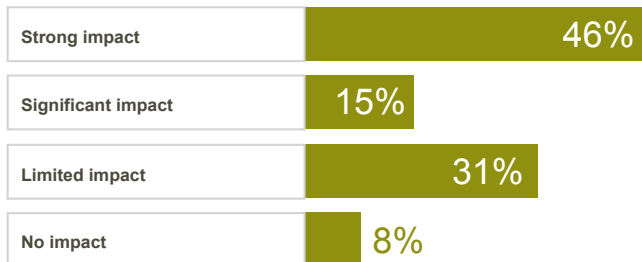
Sustainability

How would you rate the transition of the exhibition industry?

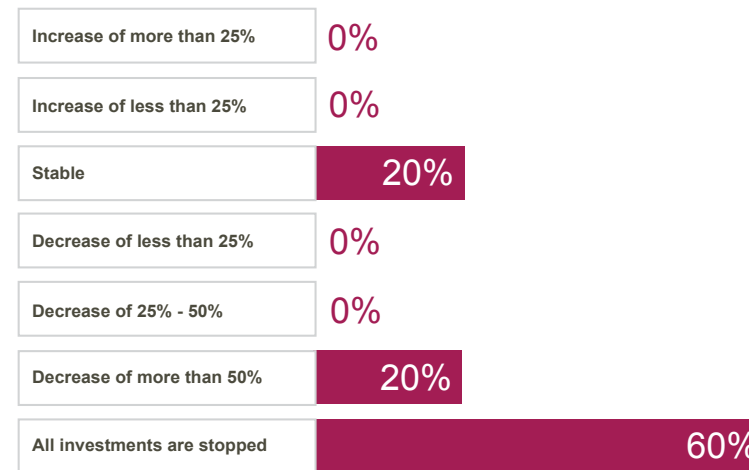
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



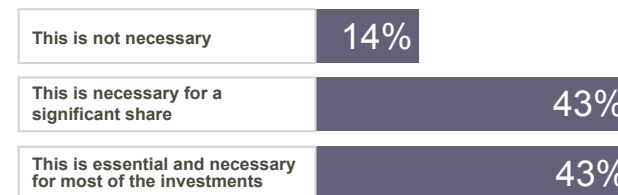
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



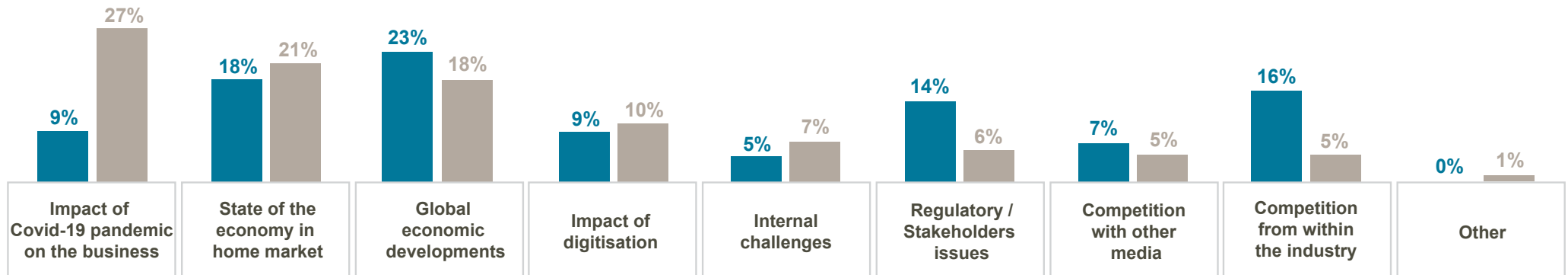
To what degree would you welcome some public investments in sustainability?





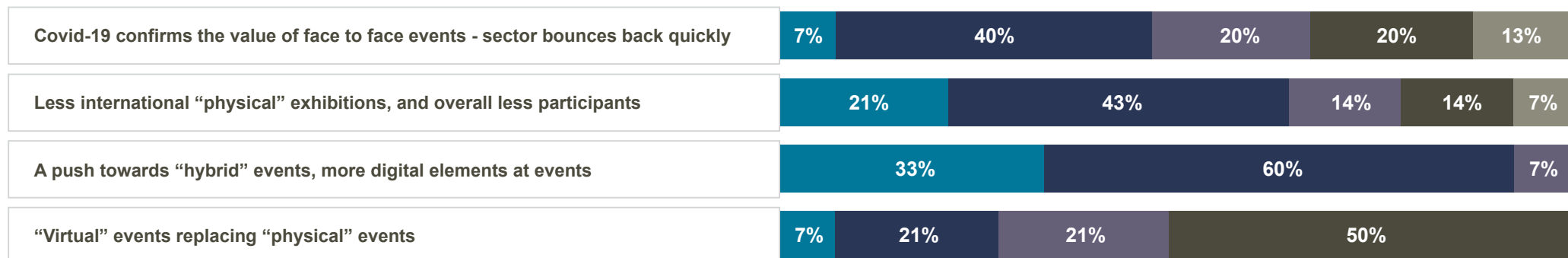
Most important business issues in the exhibition industry

Colombia Global



Format of exhibitions in the coming years

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

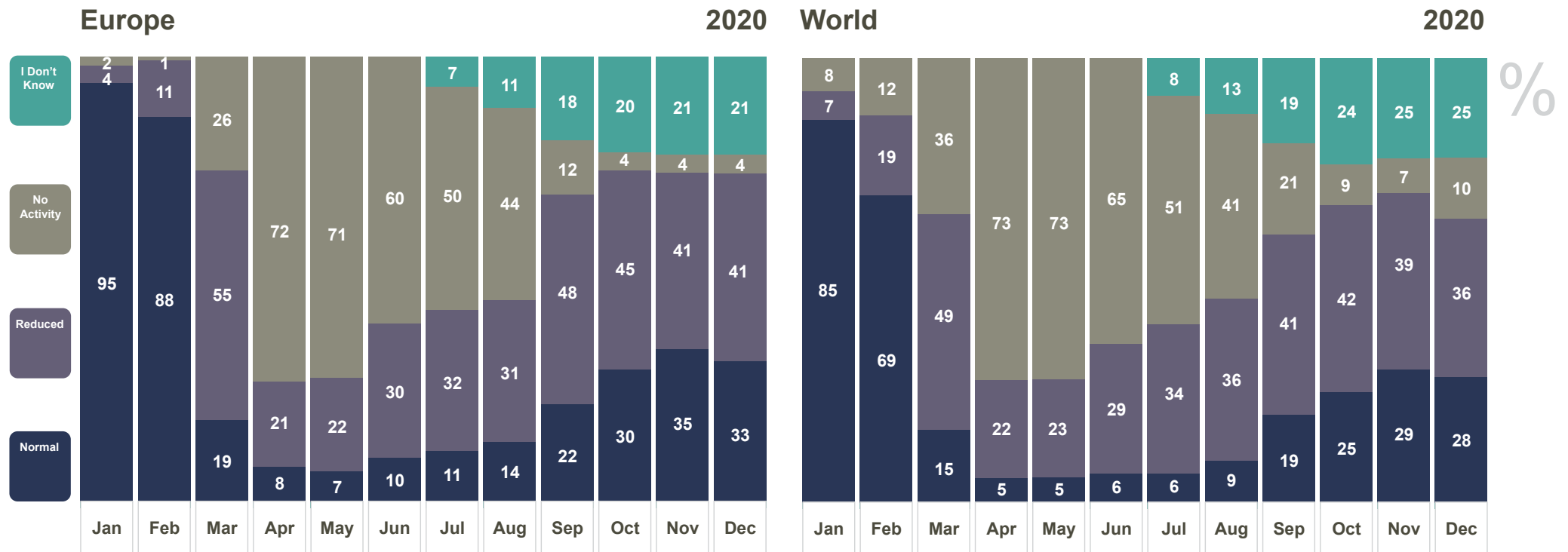




Europe



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



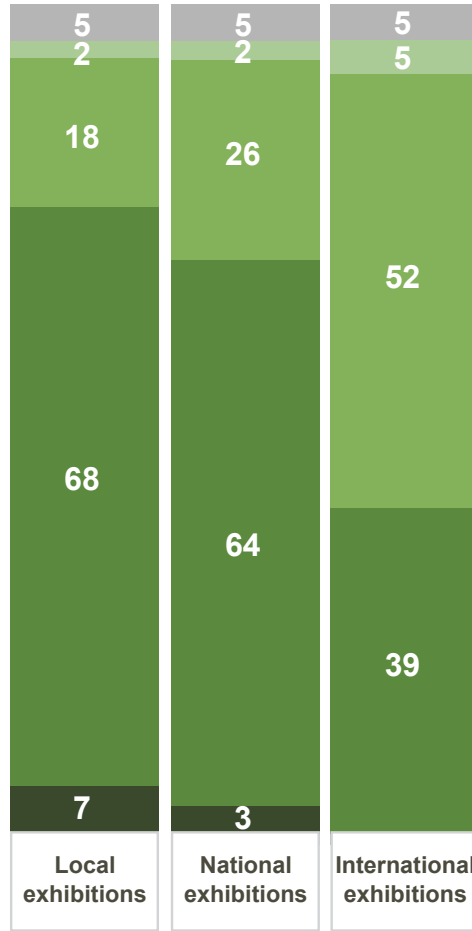
Reopening Exhibitions Europe



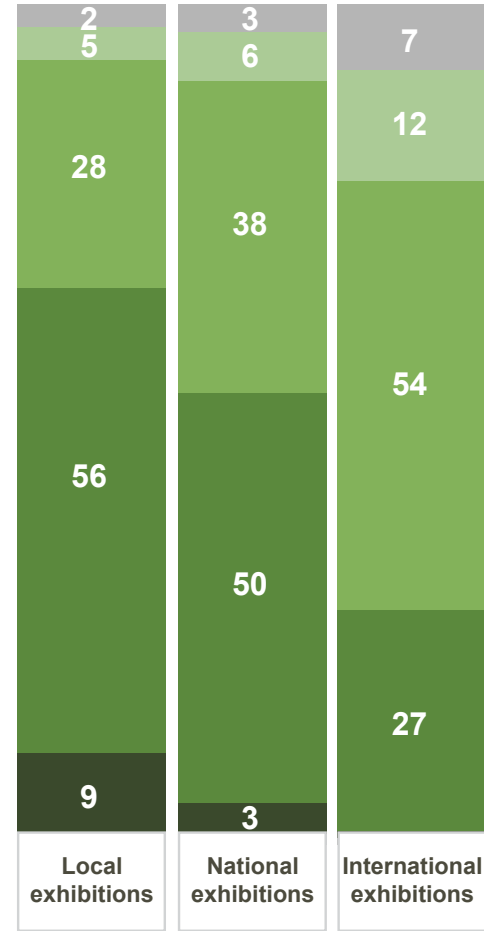
When do you believe exhibitions will open again in your city?

- Not Clear yet
- Later
- 2021-H1
- 2020-H2
- 2020-Q2

Europe



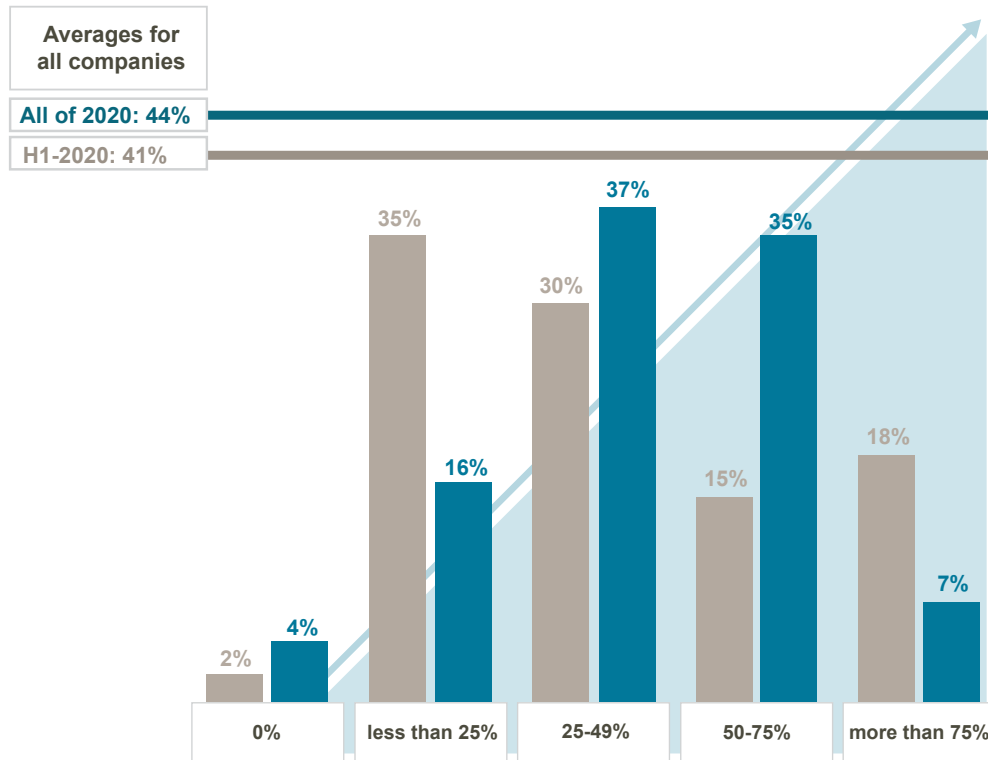
World



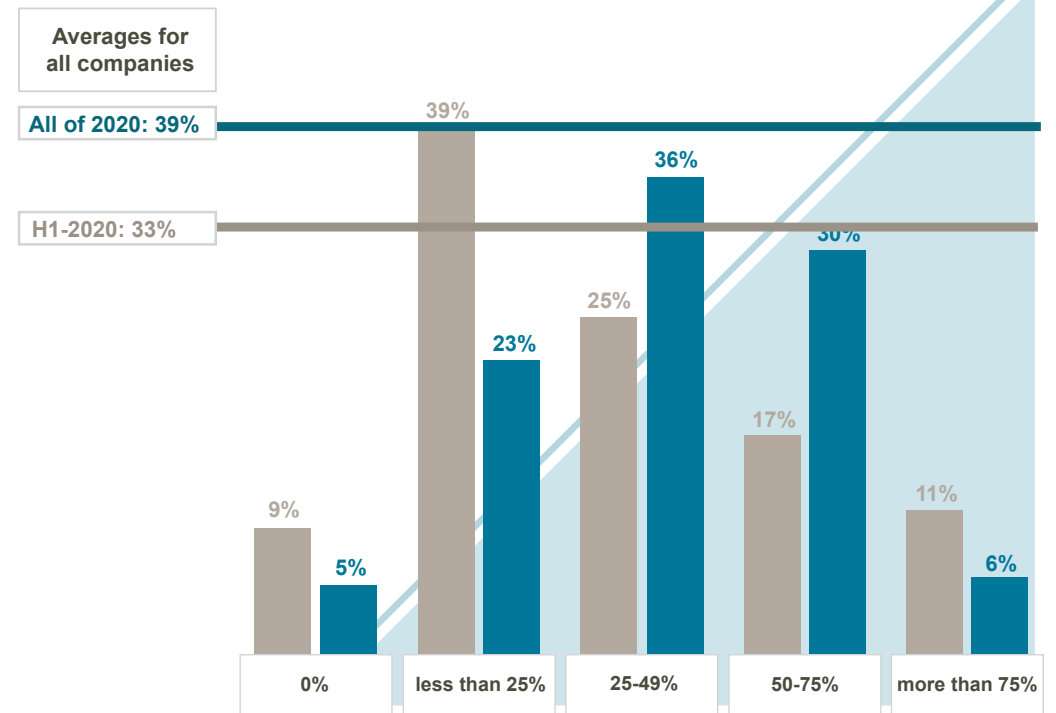
%

Revenue compared to last year (2019)

Europe

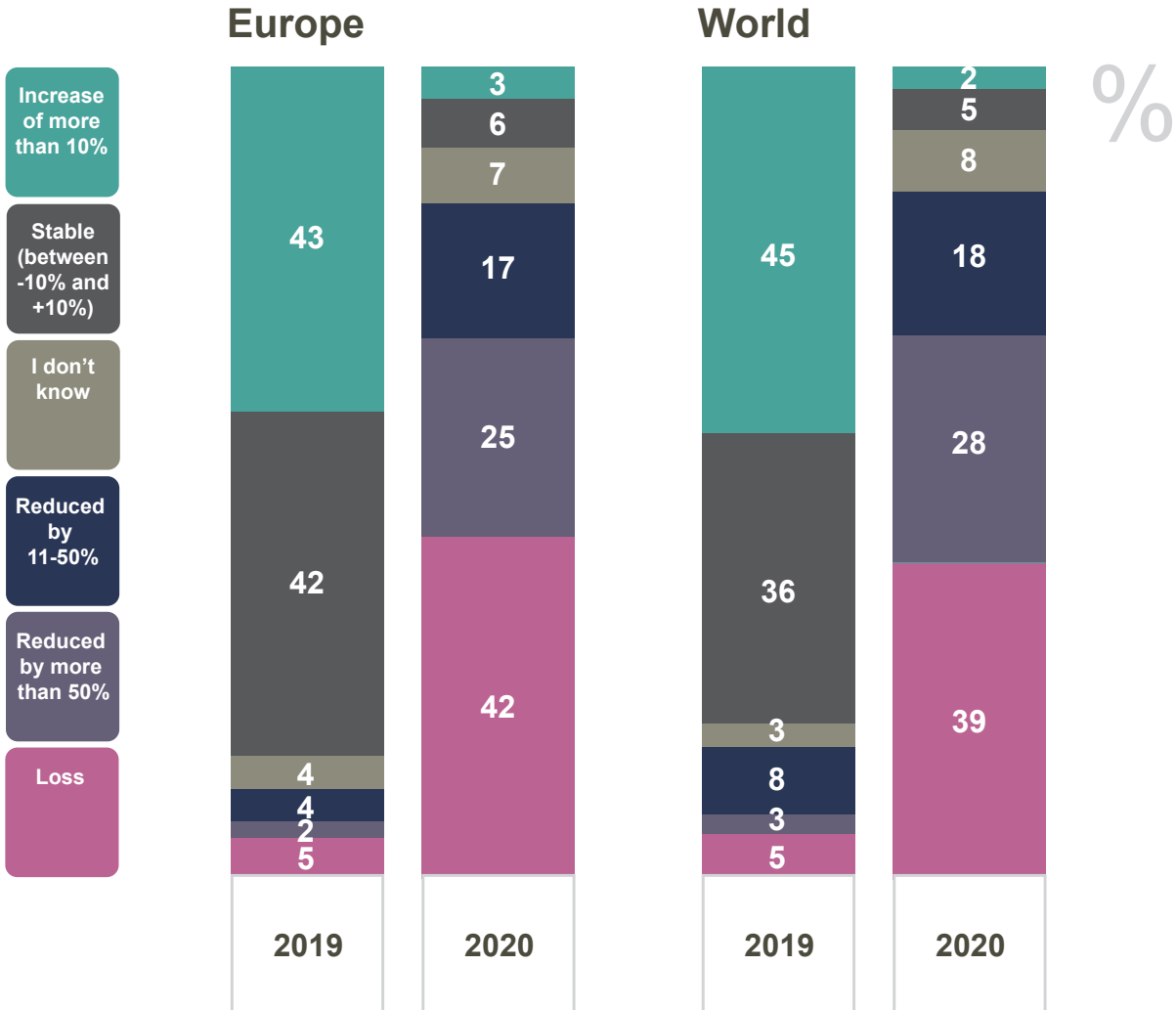


World



■ H1-2020 ■ all of 2020

Operating profits Europe

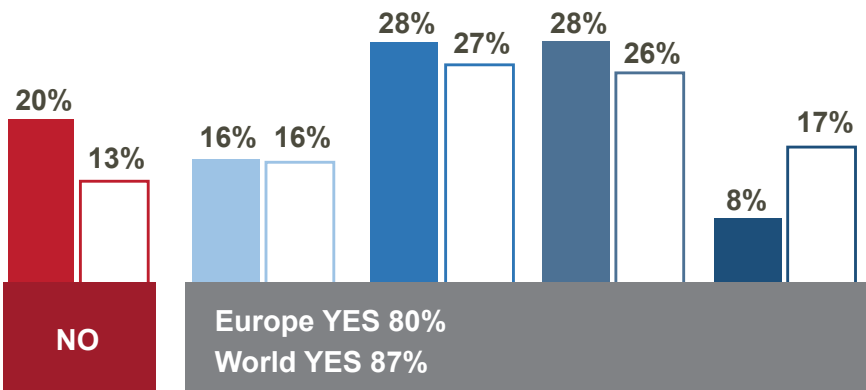


Cost Reductions - Public Financial Support Europe



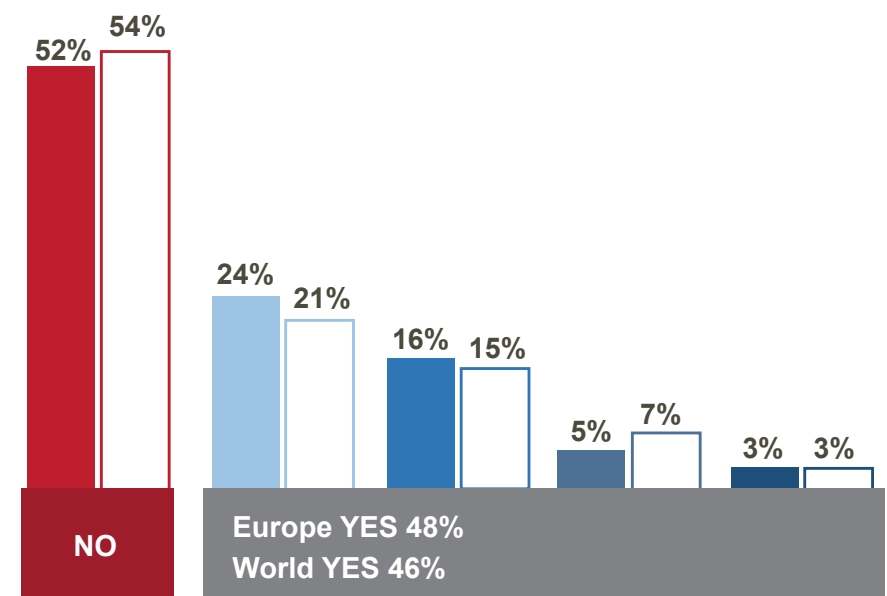
Did your company implement cost reductions?

Europe World



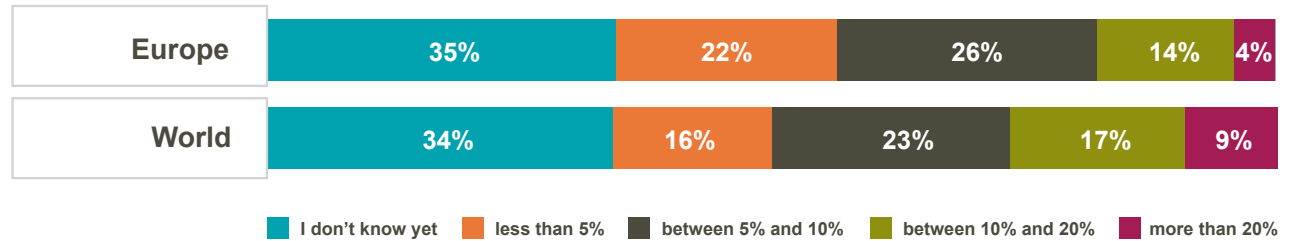
Did your company benefit from public financial support?

Europe World



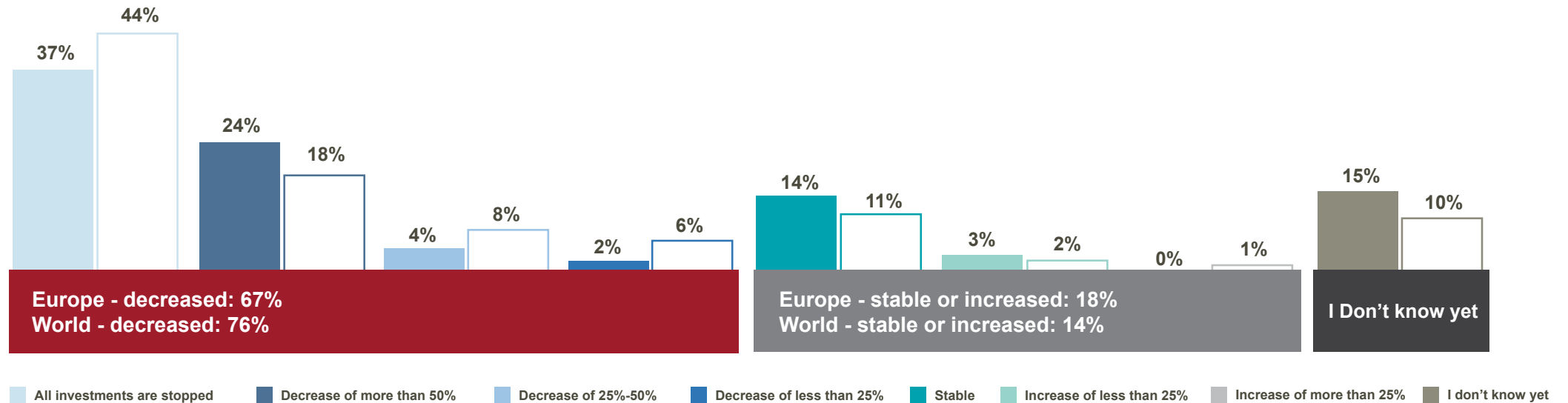
Legend: No (red), Yes, for less than 10% of our 2019 overall costs (light blue), Yes, for between 10% and 25% of our 2019 overall costs (medium blue), Yes, for between 25% and 50% of our 2019 overall costs (dark blue), Yes, for more than 50% of our 2019 overall costs (darkest blue)

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?

North America World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Europe

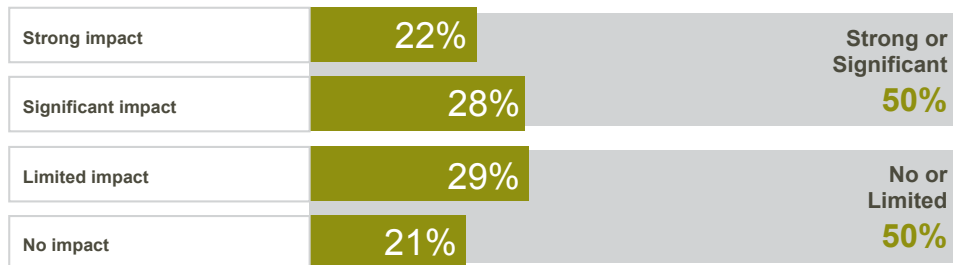


World

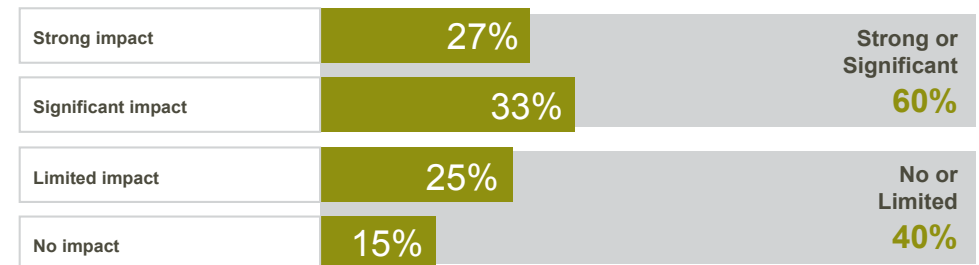


To what extent has Covid-19 impacted your company activities in digitalisation?

Europe



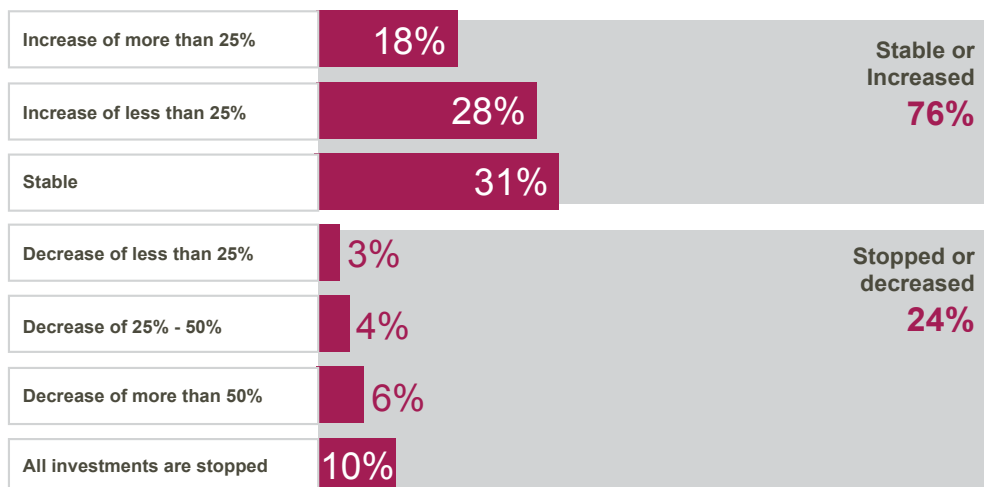
World



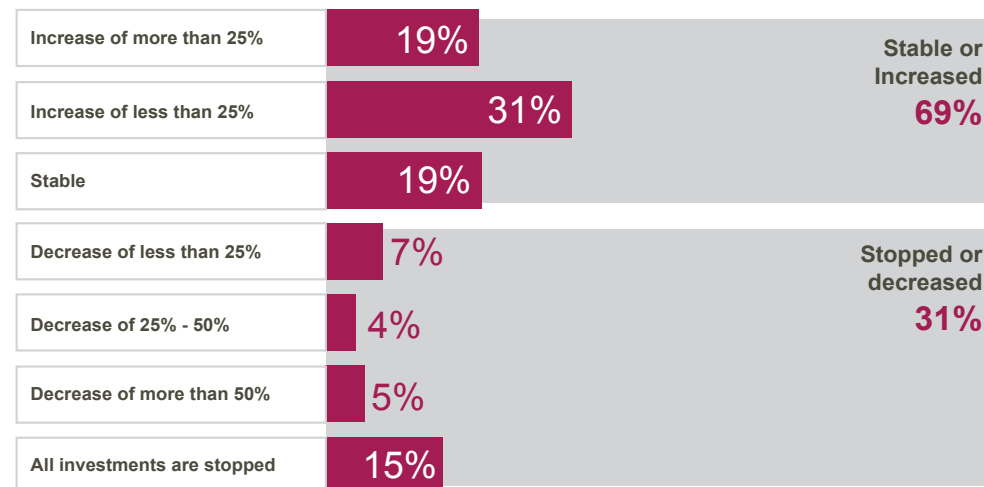


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?

Europe

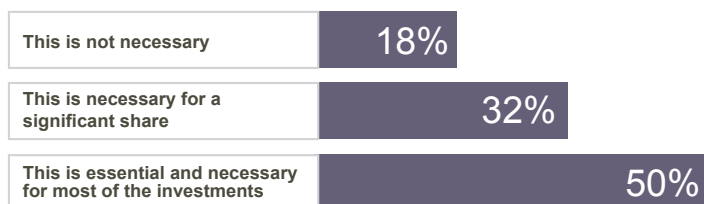


World

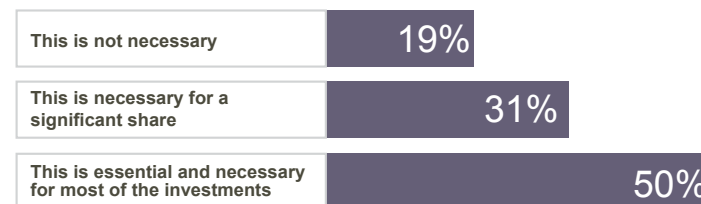


To what degree would you welcome some public investments in digitalisation?

Europe



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Europe

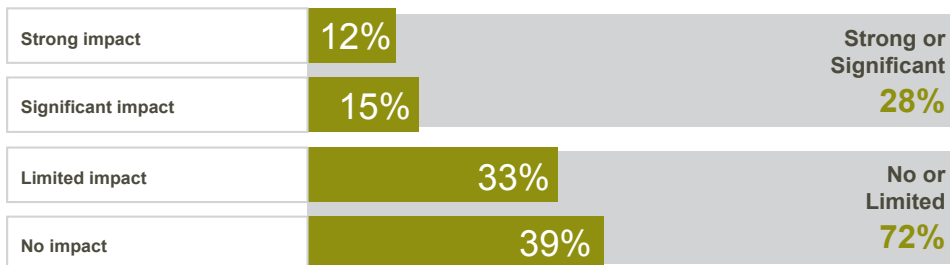


World

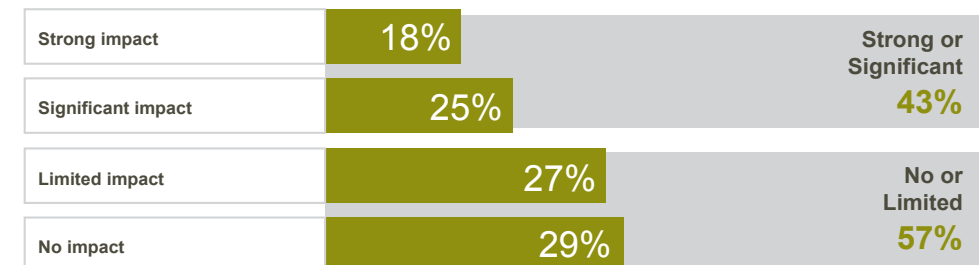


To what extent has Covid-19 impacted your company activities in diversity?

Europe



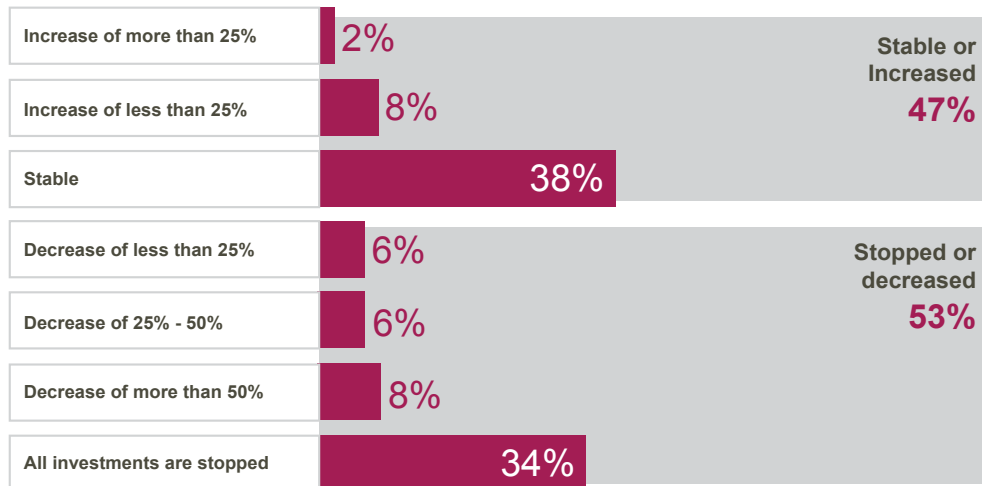
World



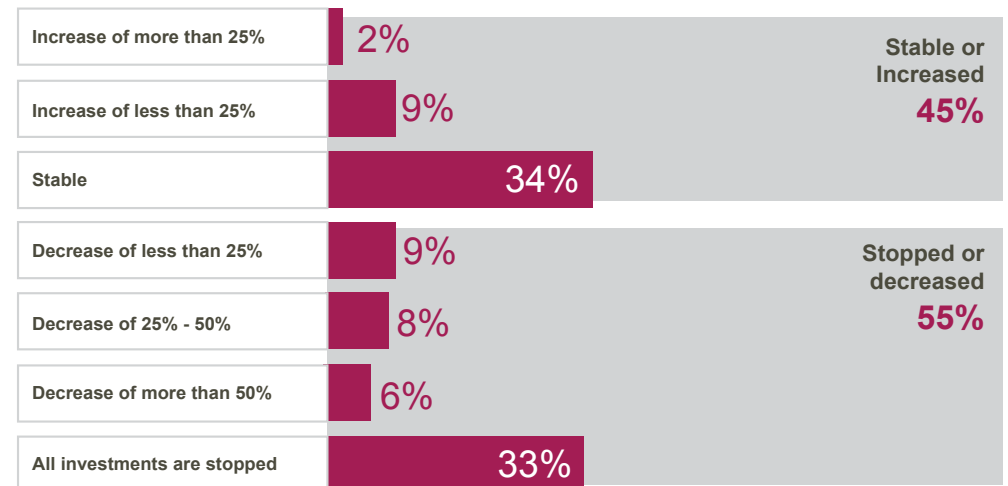


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?

Europe



World

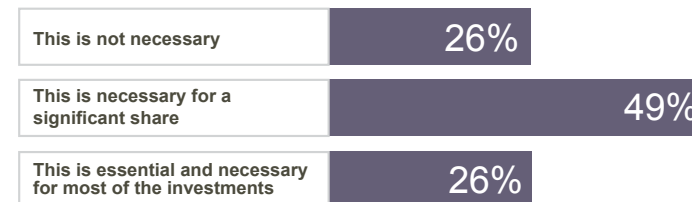


To what degree would you welcome some public investments in diversity?

Europe



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Europe

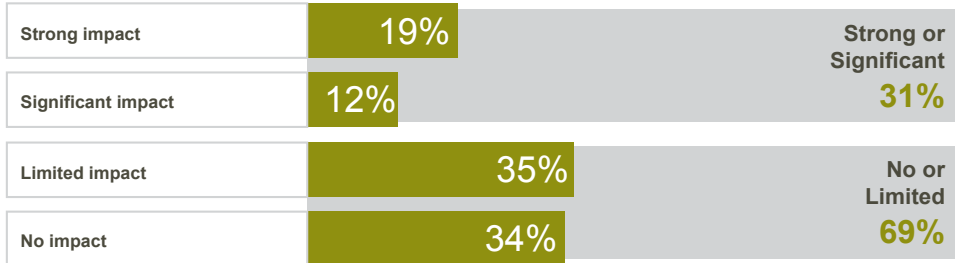


World

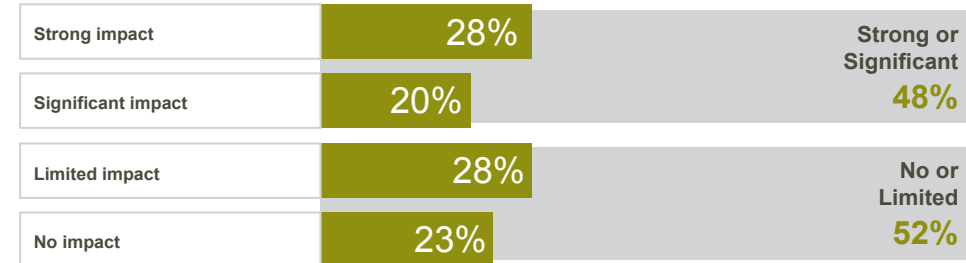


To what extent has Covid-19 impacted your company activities in sustainability?

Europe



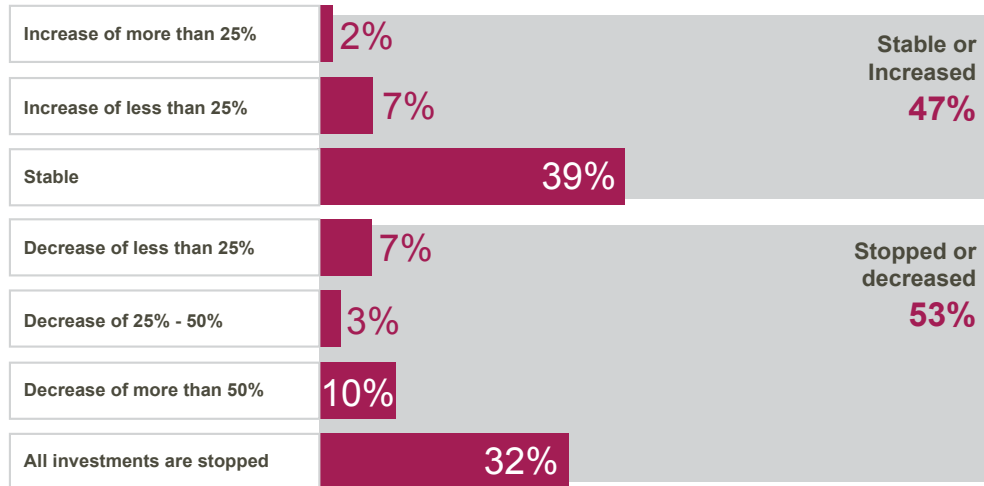
World



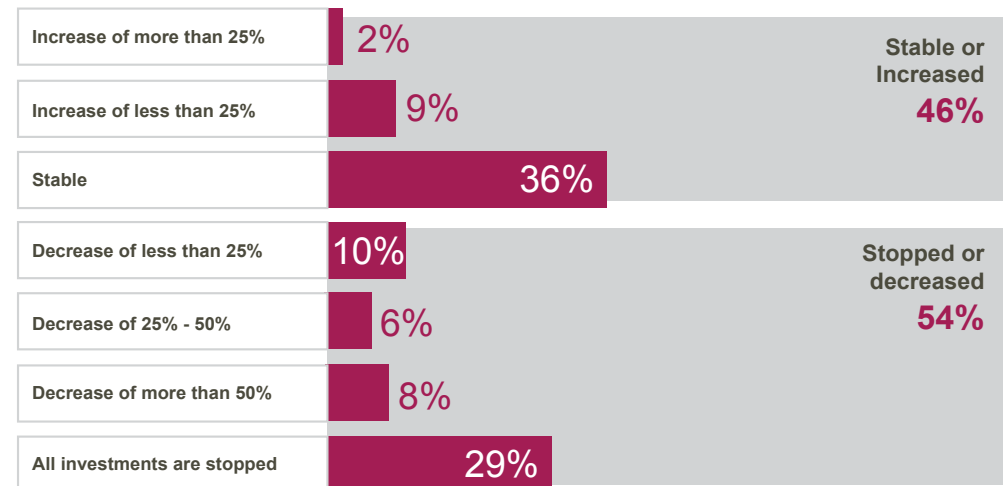


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?

Europe

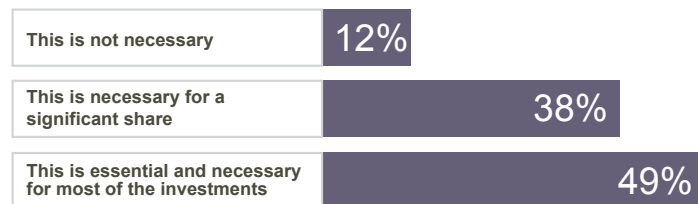


World

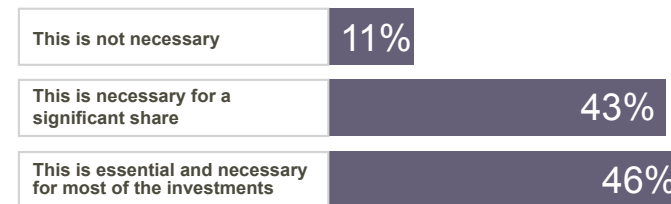


To what degree would you welcome some public investments in sustainability?

Europe



World

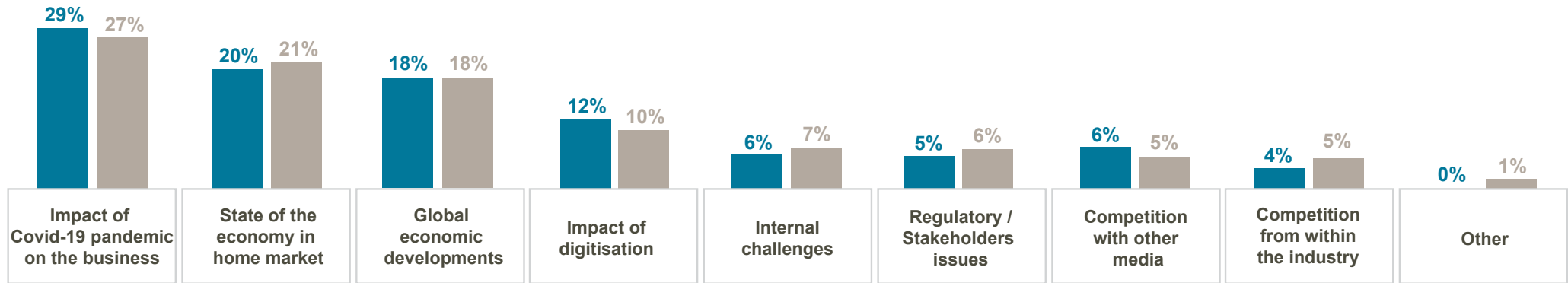


Most Important Business Issues - Format of Exhibitions - Europe



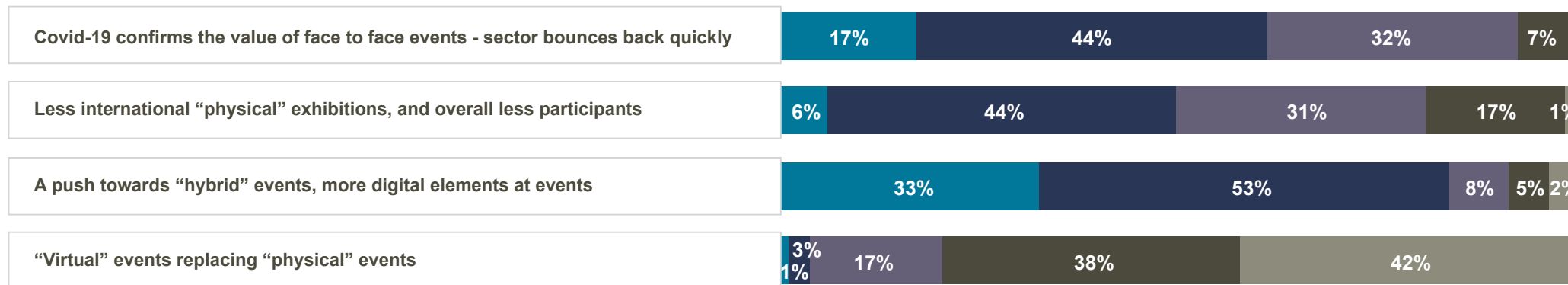
Most important business issues in the exhibition industry

Europe Global



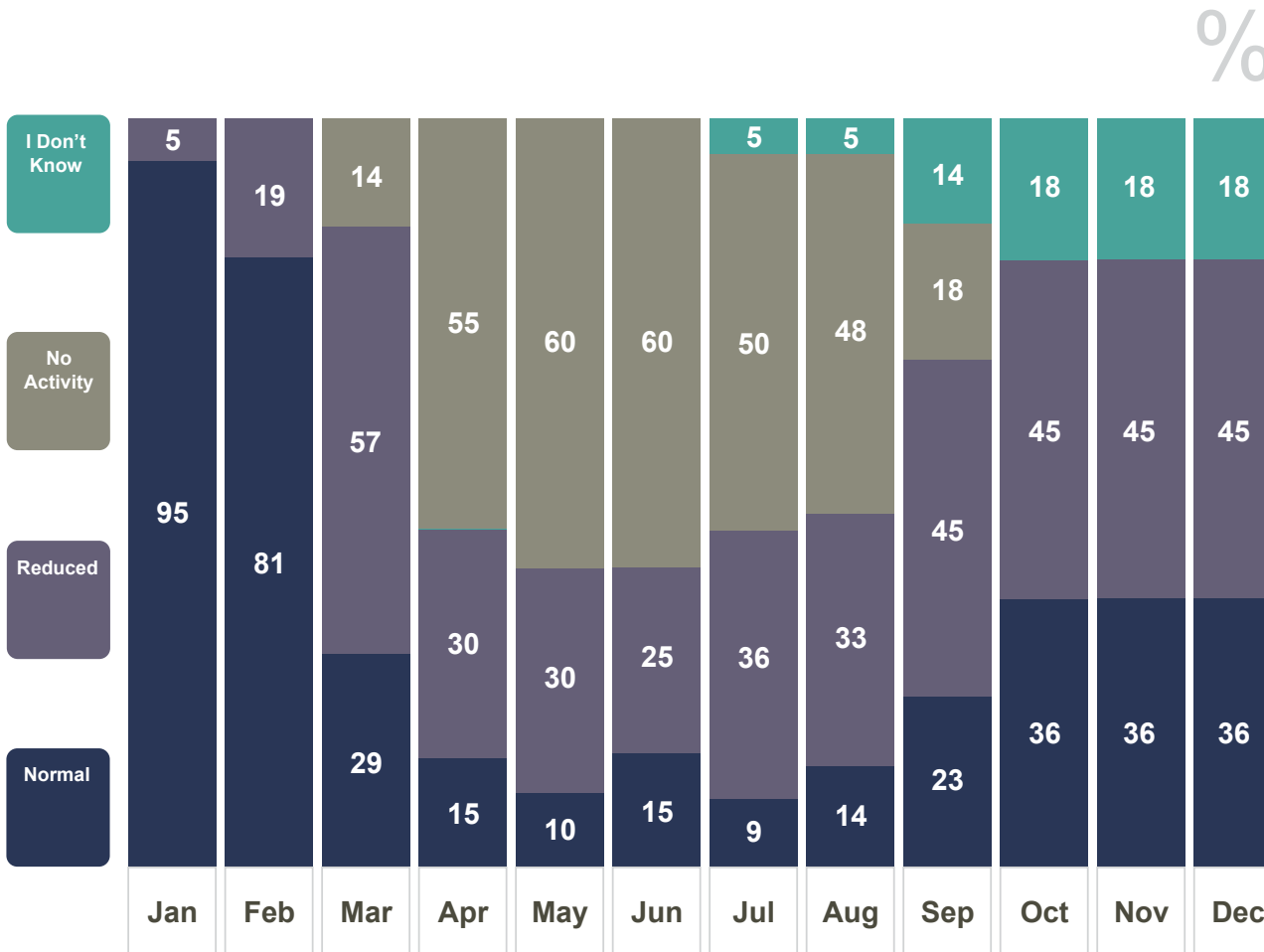
Format of exhibitions in the coming years

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

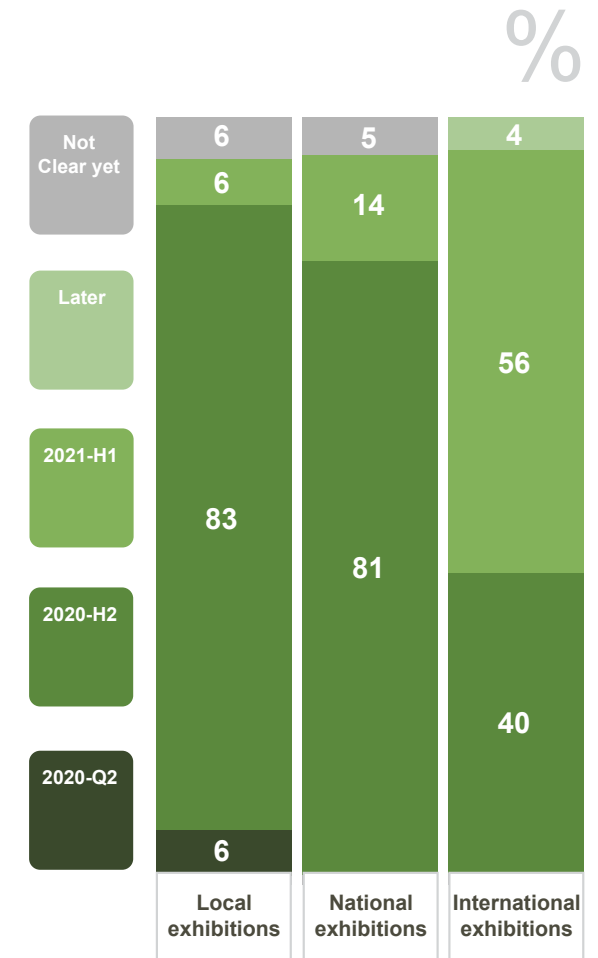




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

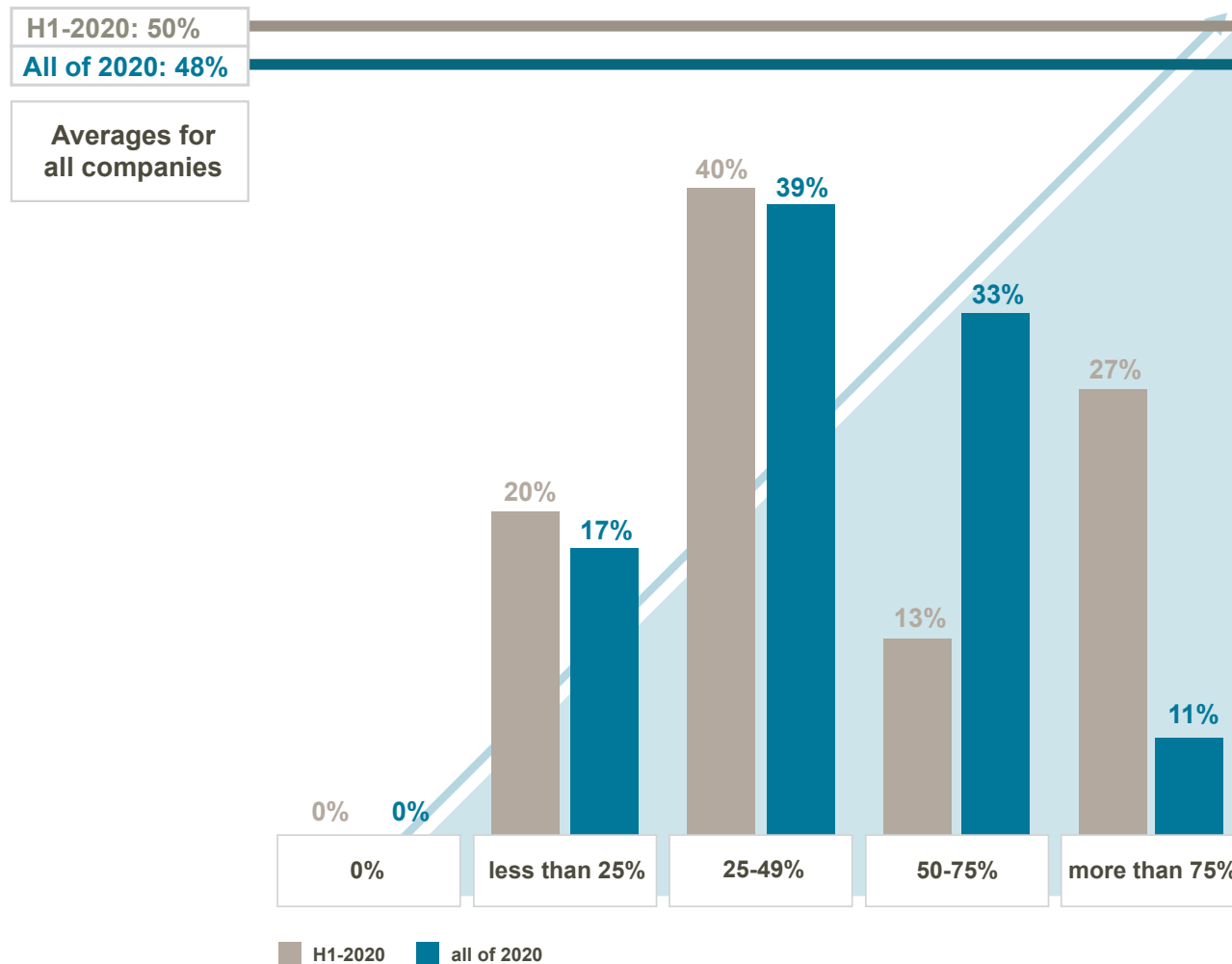


When do you believe exhibitions will open again in your city?

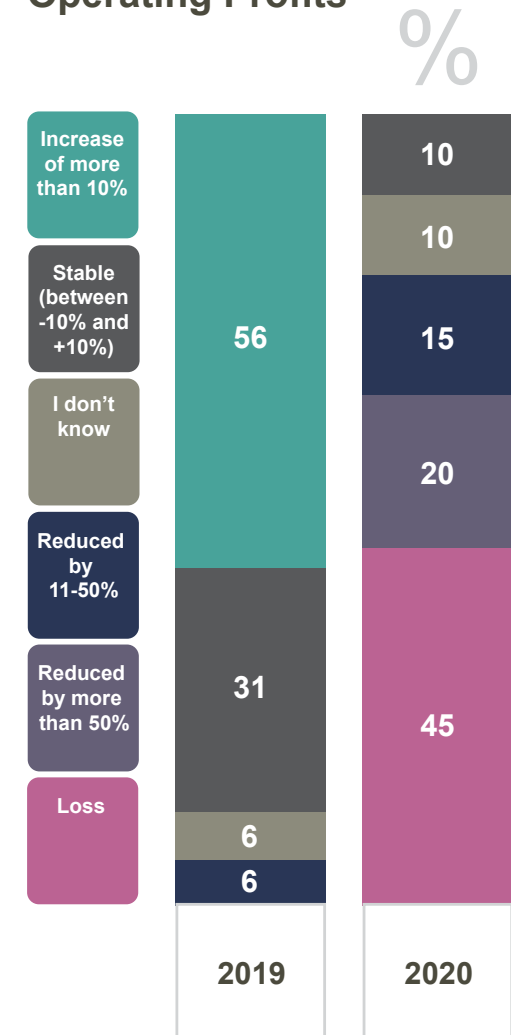




Revenue compared to last year (2019)

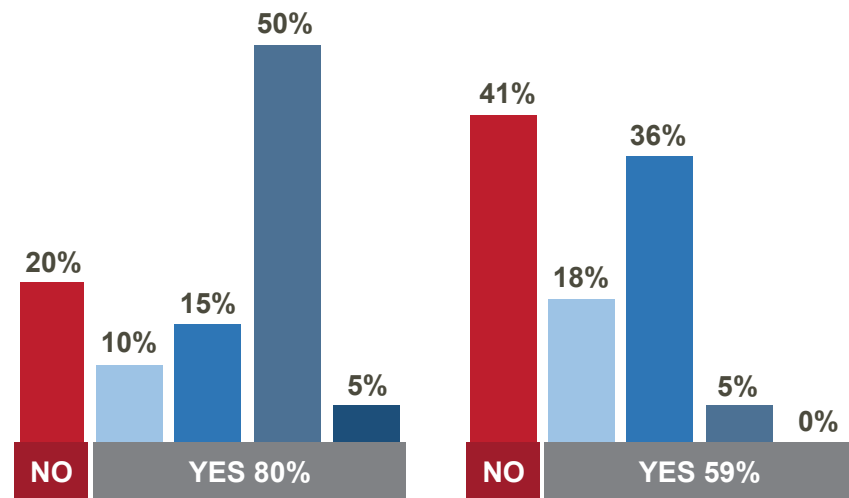


Operating Profits



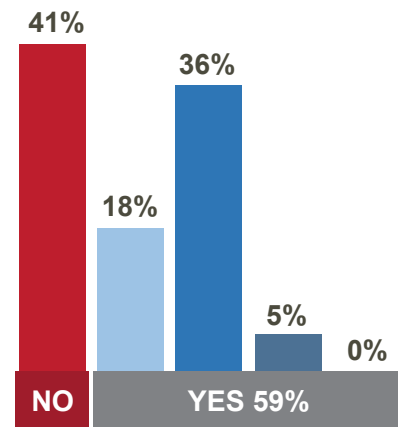


Did your company implement cost reductions?

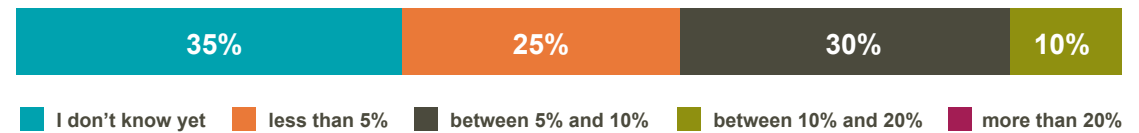


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

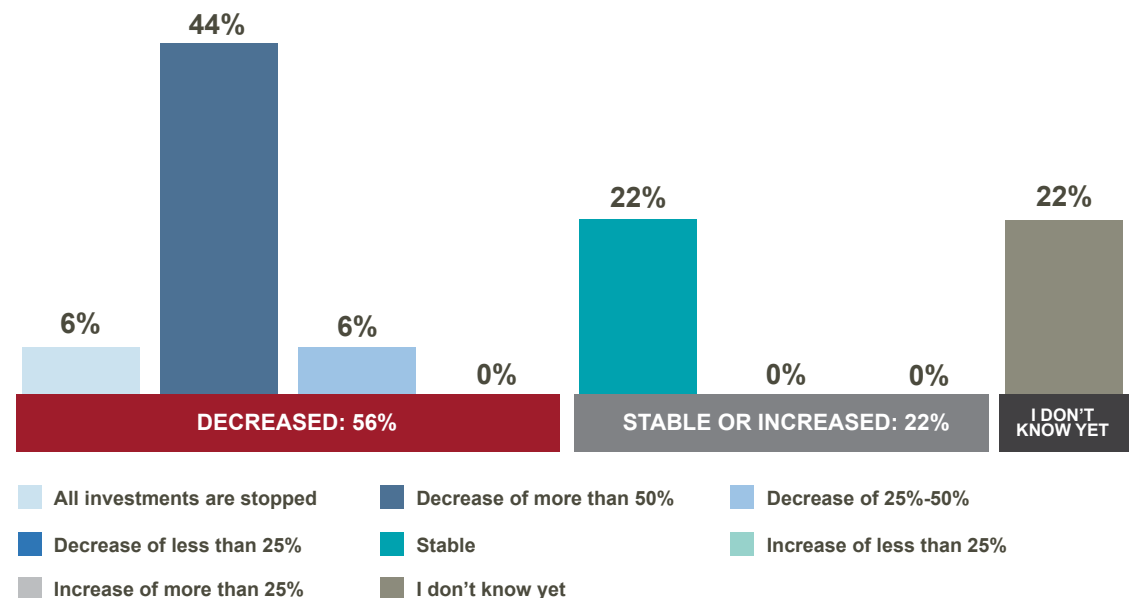
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





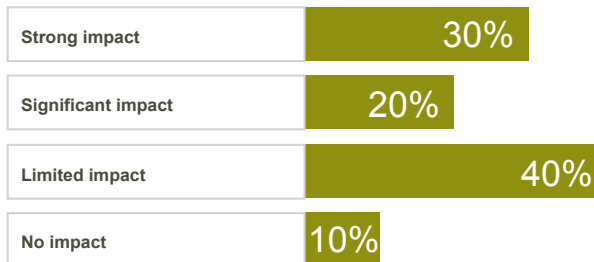
Digitalisation

How would you rate the transition of the exhibition industry?

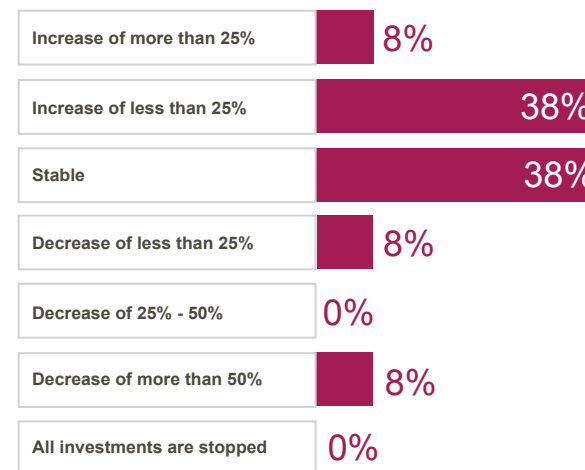
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

2.2

To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





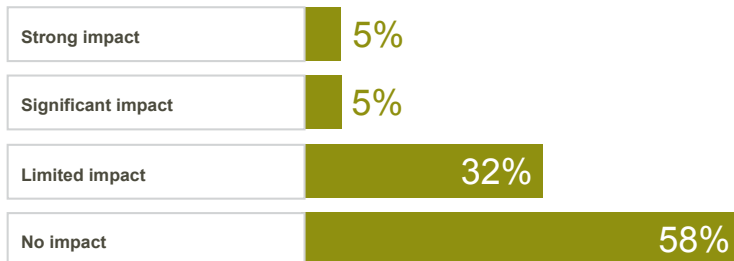
Diversity

How would you rate the transition of the exhibition industry?

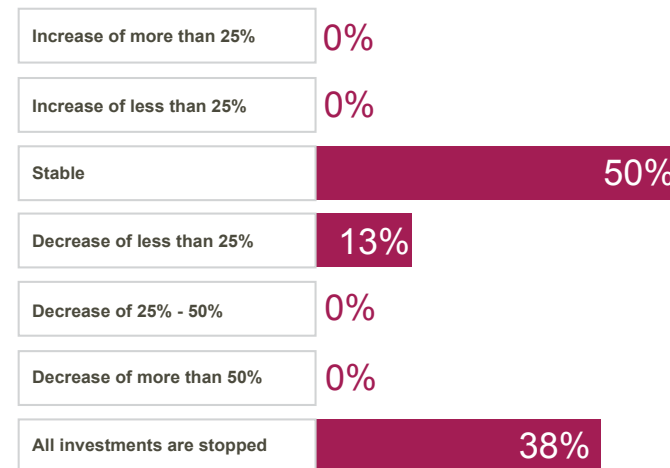
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



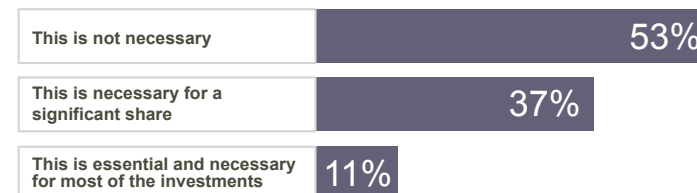
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





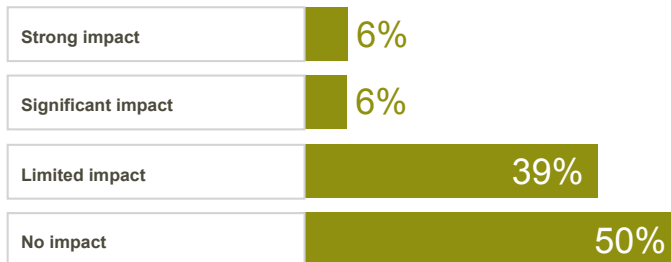
Sustainability

How would you rate the transition of the exhibition industry?

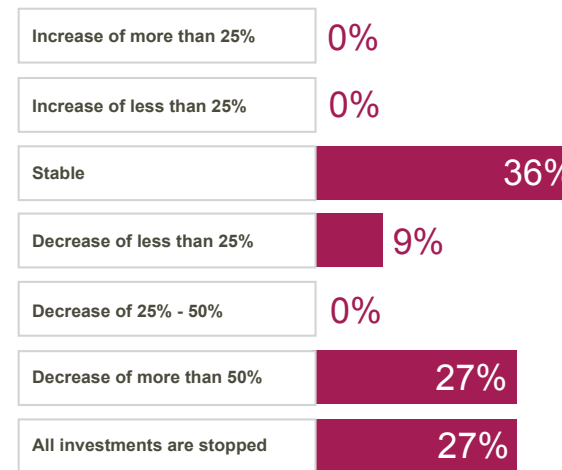
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



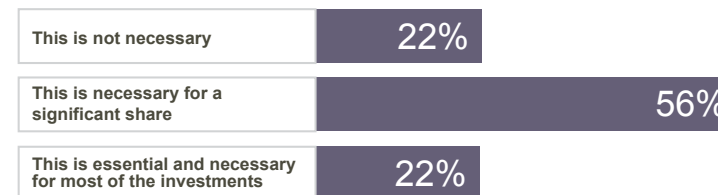
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

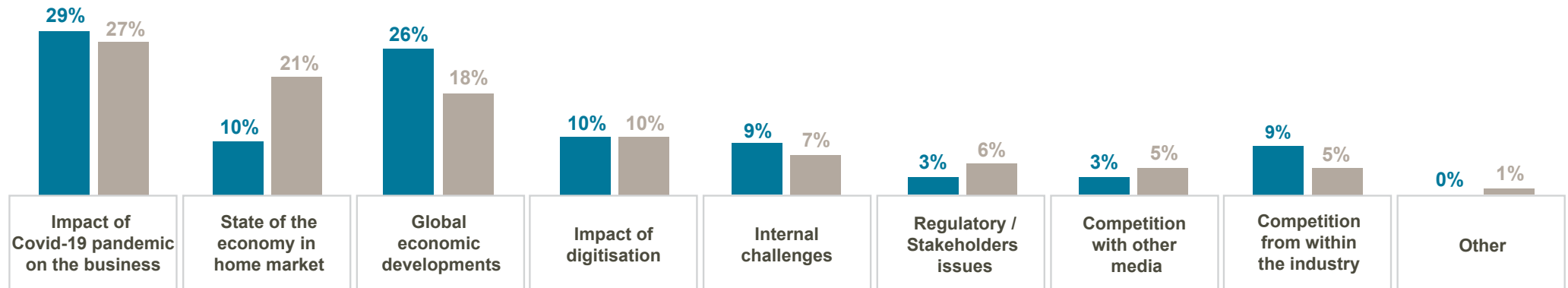


Detailed results for Germany



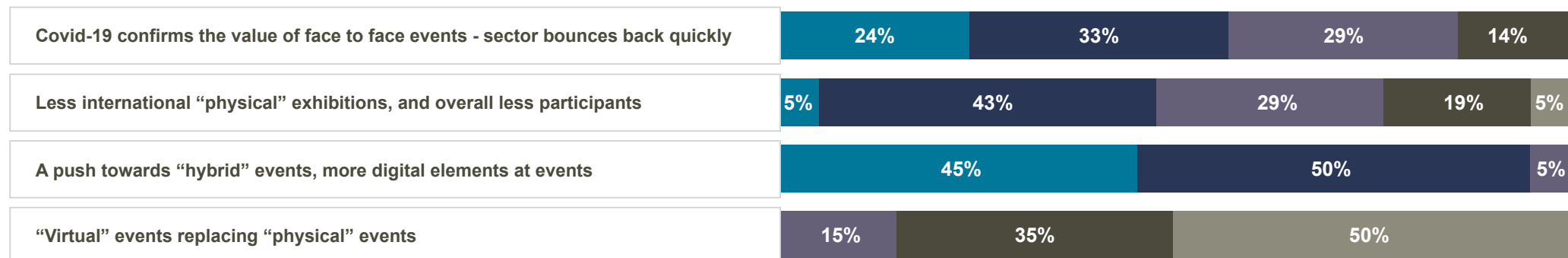
Most important business issues in the exhibition industry

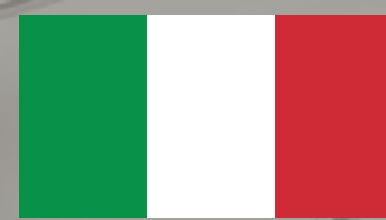
Germany Global



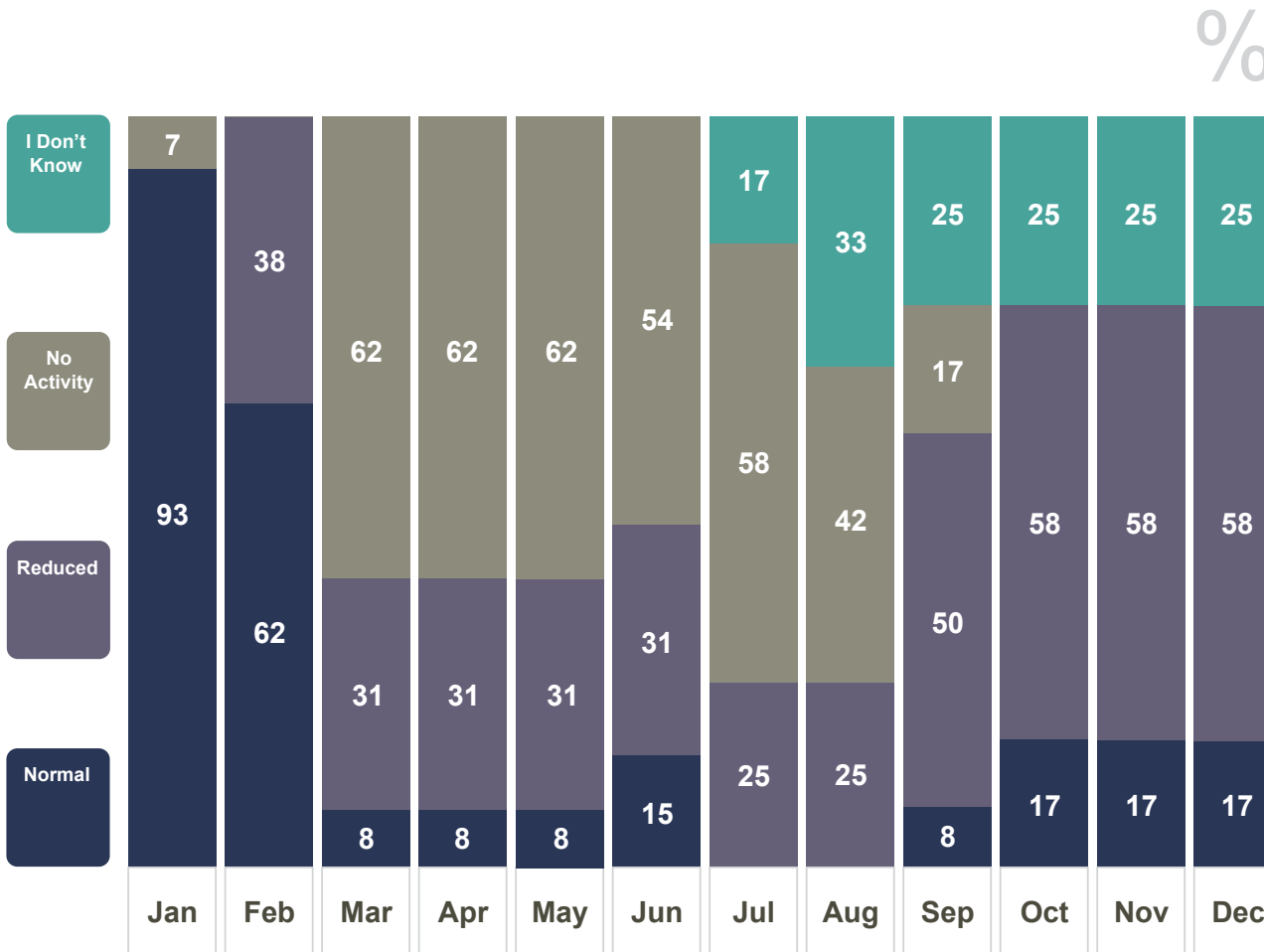
Format of exhibitions in the coming years

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

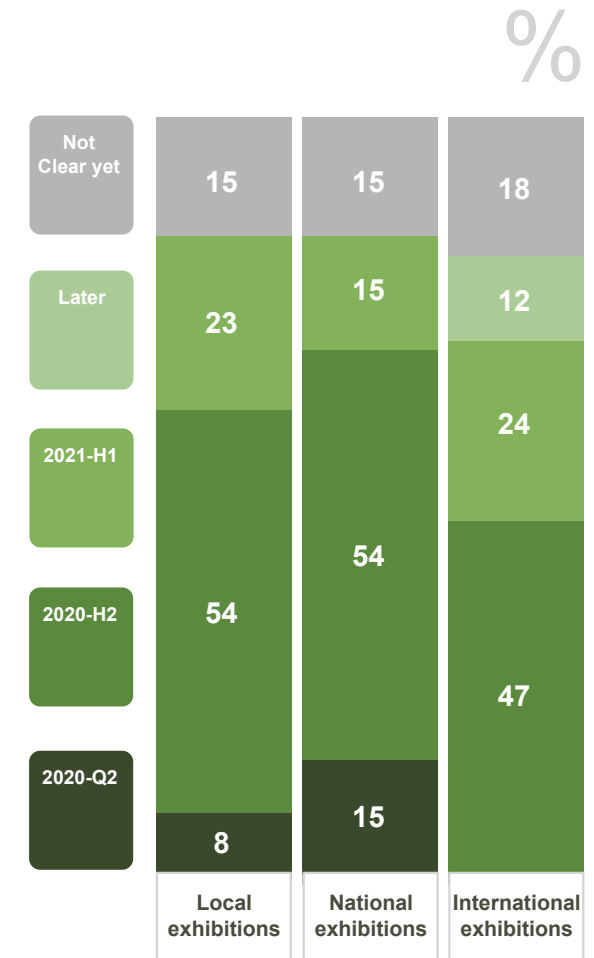


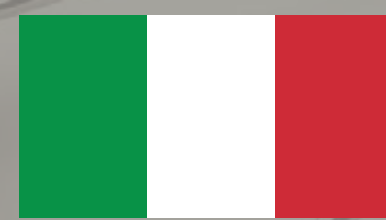


Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

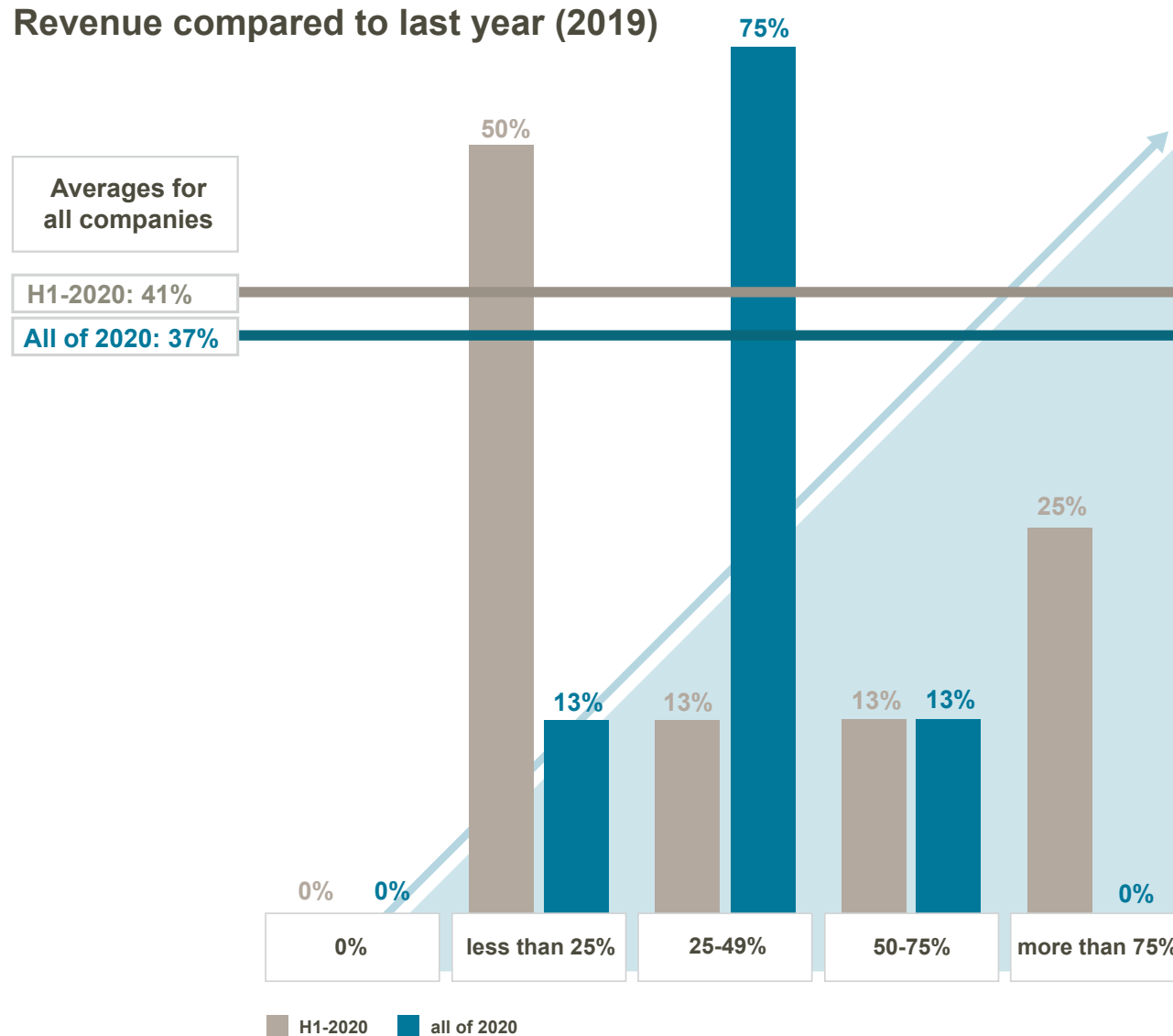


When do you believe exhibitions will open again in your city?

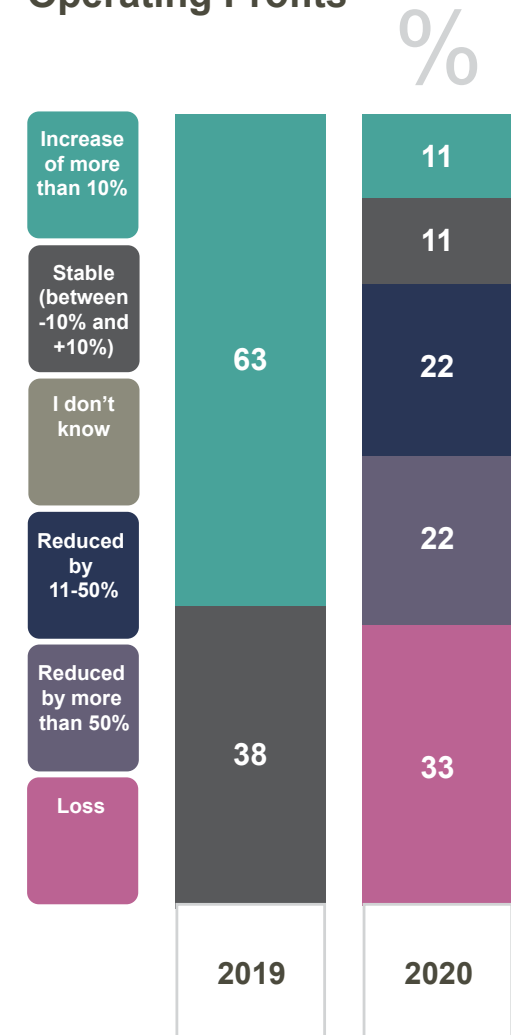


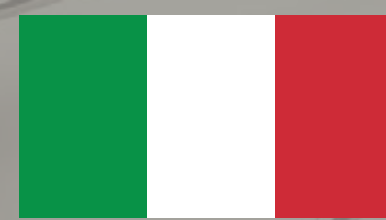


Revenue compared to last year (2019)

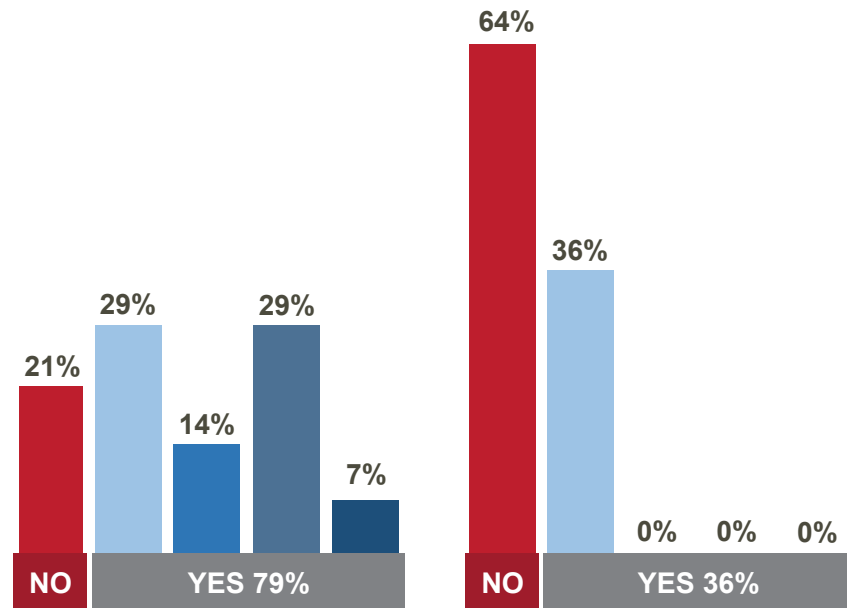


Operating Profits



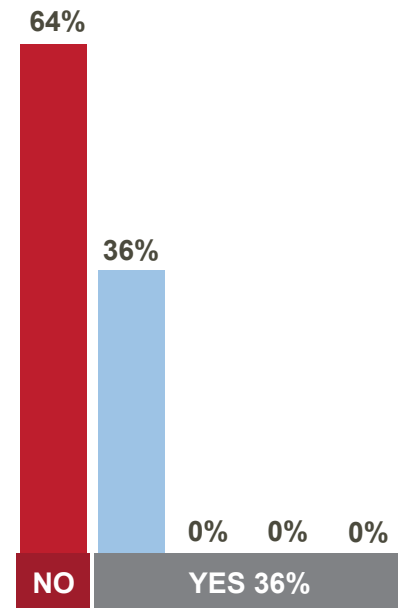


Did your company implement cost reductions?



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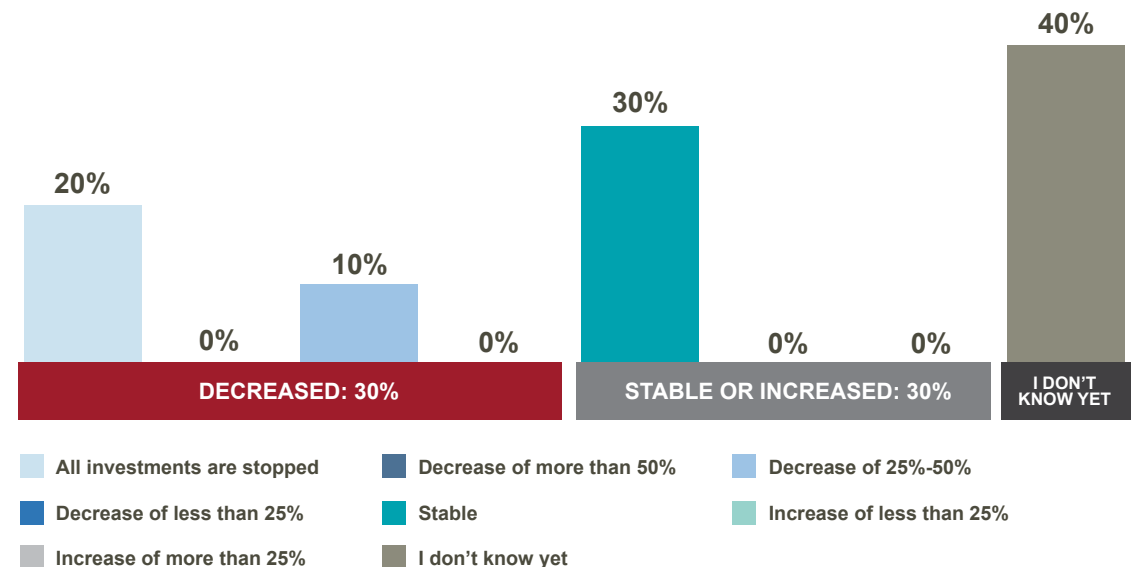
Did your company benefit from public financial support?

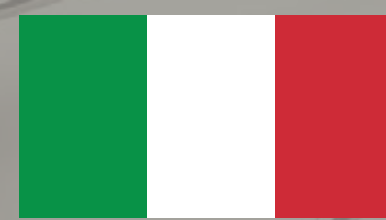


Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





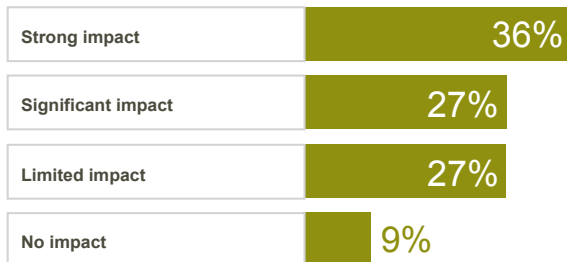
Digitalisation

How would you rate the transition of the exhibition industry?

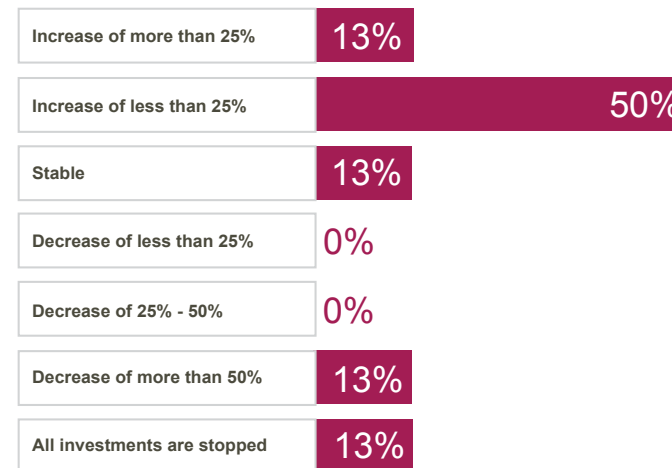
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



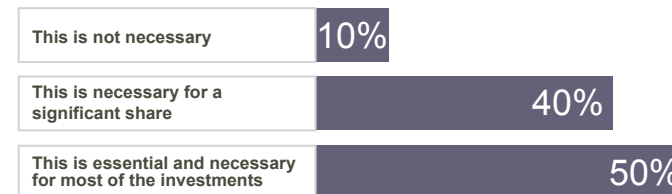
To what extent has Covid-19 impacted your company activities in digitalisation?

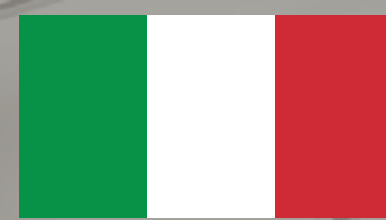


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





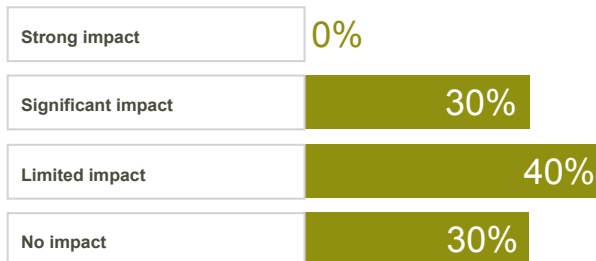
Diversity

How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



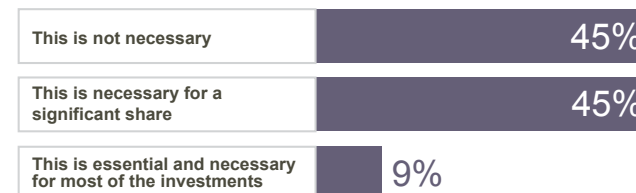
To what extent has Covid-19 impacted your company activities in diversity?

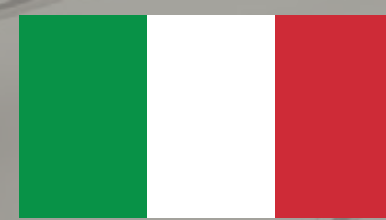


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





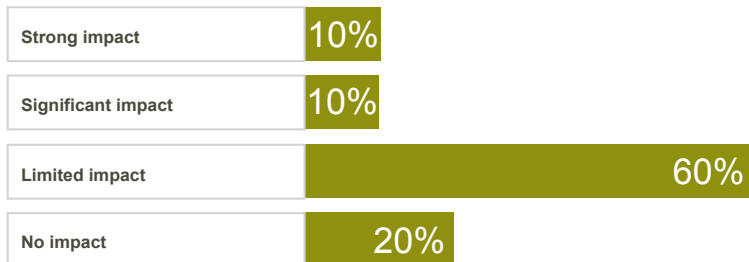
Sustainability

How would you rate the transition of the exhibition industry?

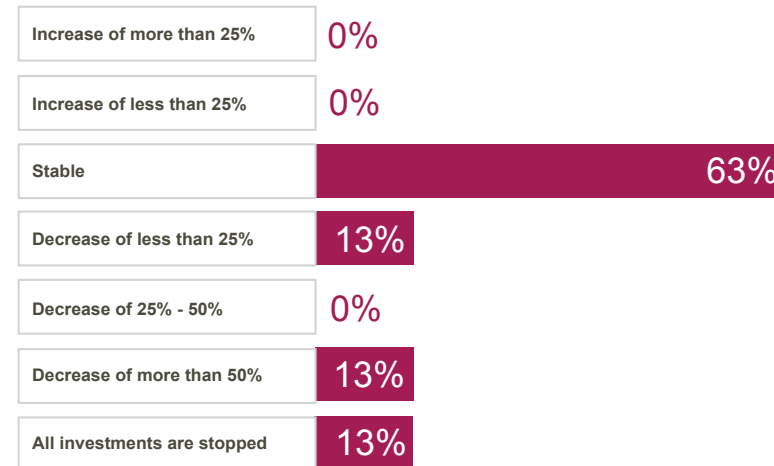
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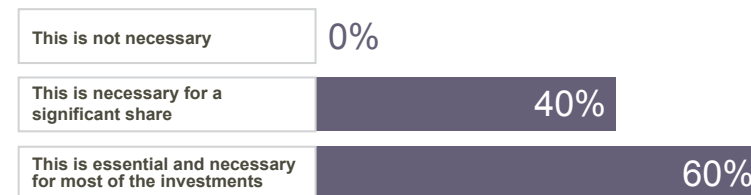
To what extent has Covid-19 impacted your company activities in sustainability?

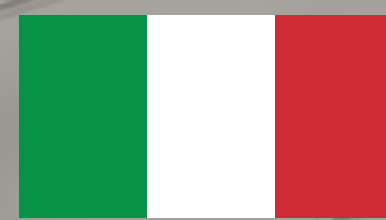


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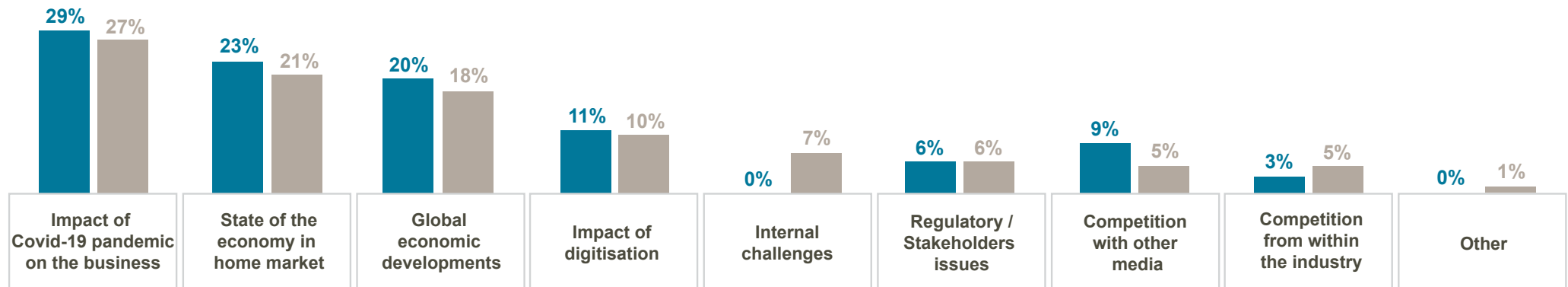
To what degree would you welcome some public investments in sustainability?





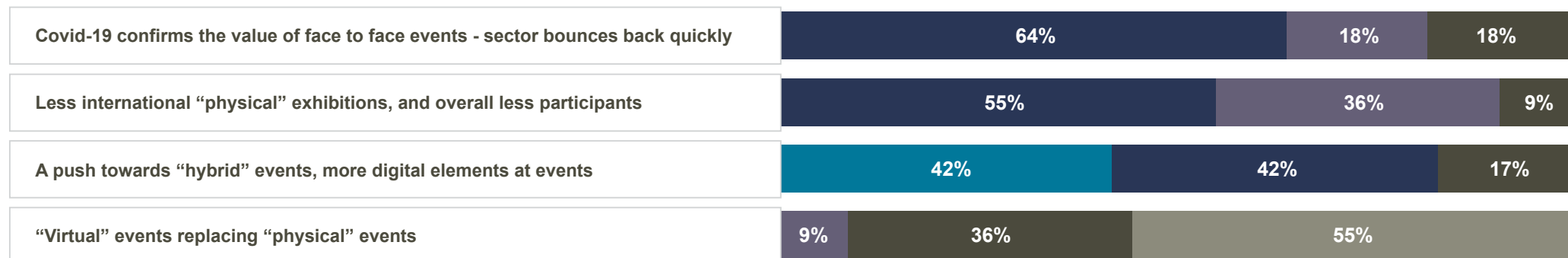
Most important business issues in the exhibition industry

Italy Global

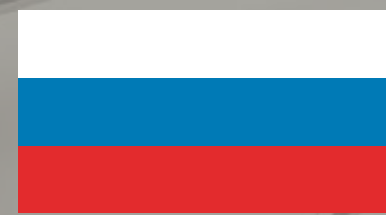


Format of exhibitions in the coming years

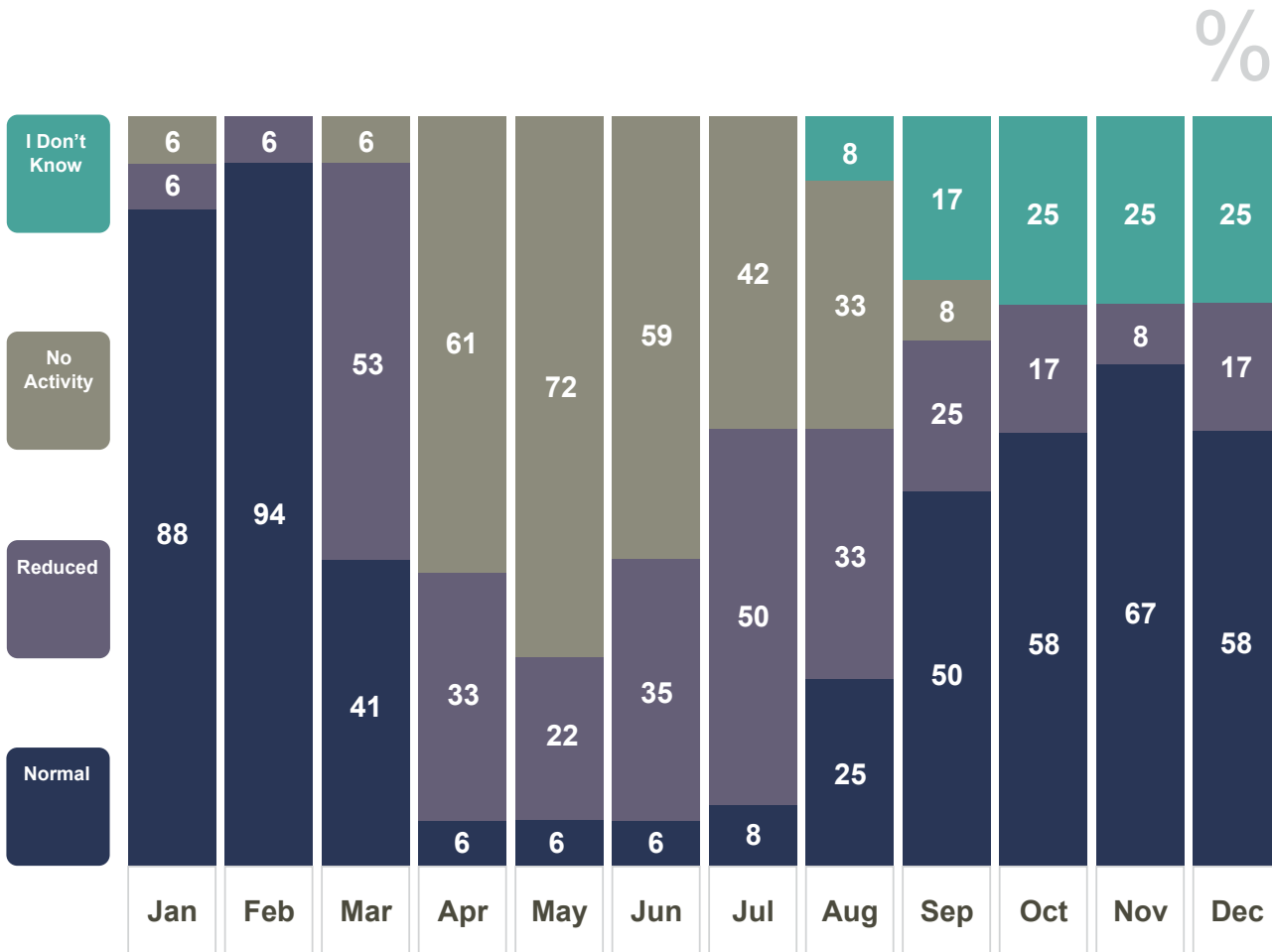
Yes, for sure Most probably Not sure Not sure at all Definitely not



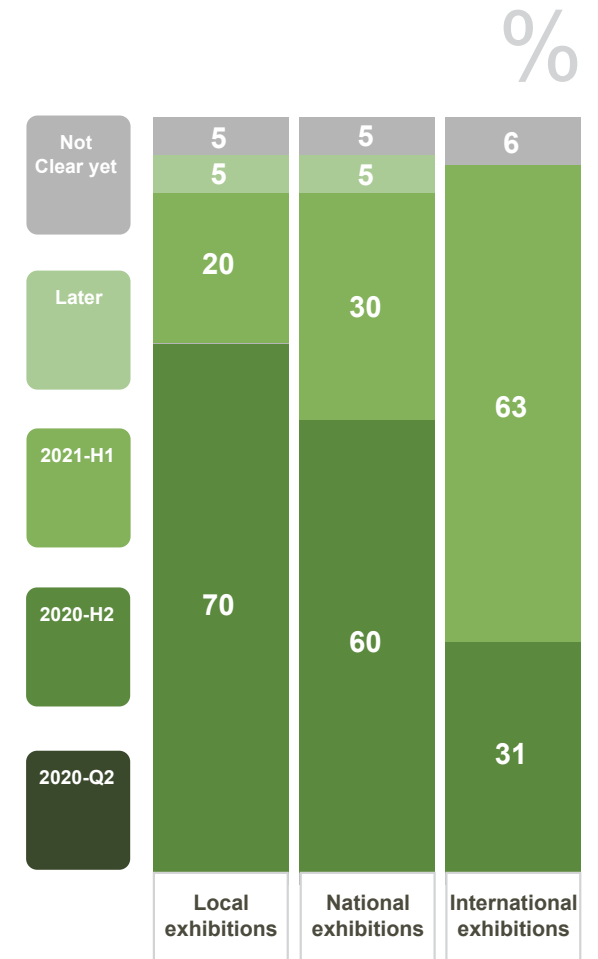
Detailed results for Russia

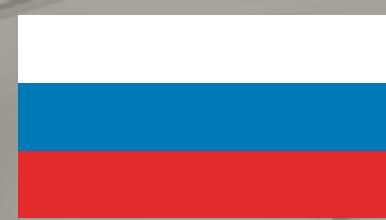


Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

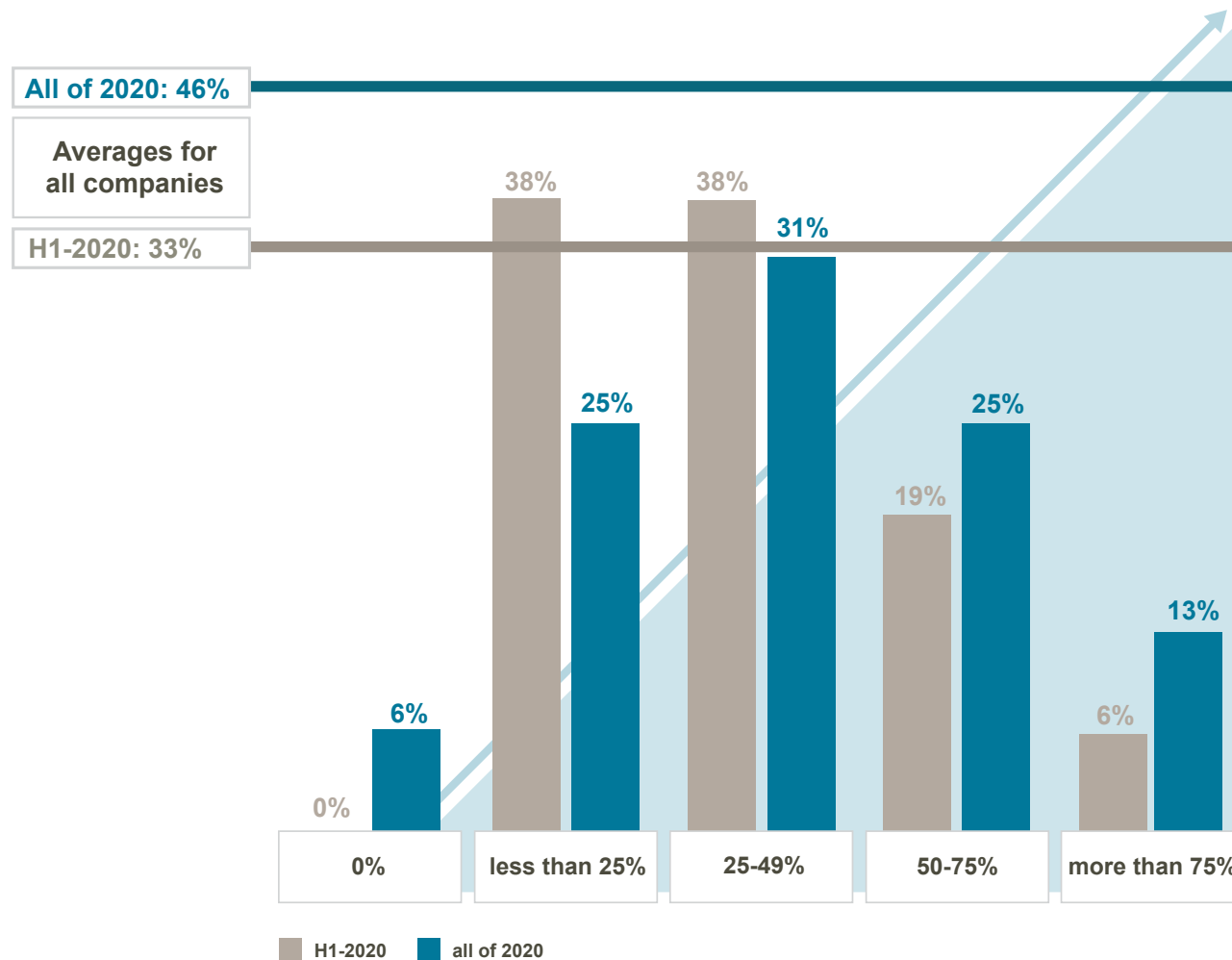


When do you believe exhibitions will open again in your city?

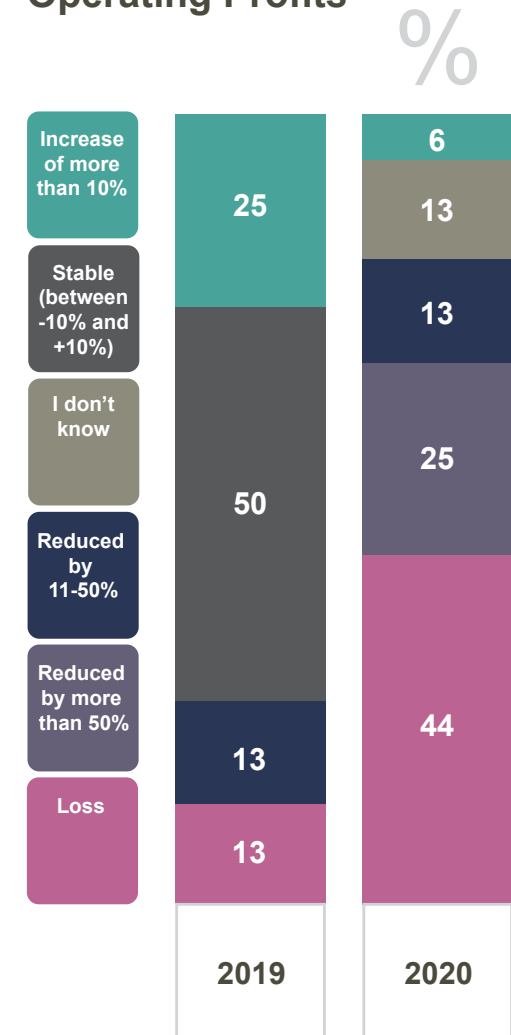


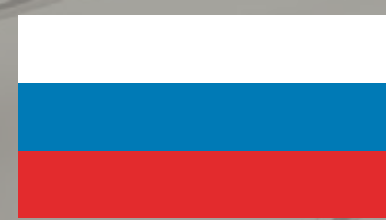


Revenue compared to last year (2019)

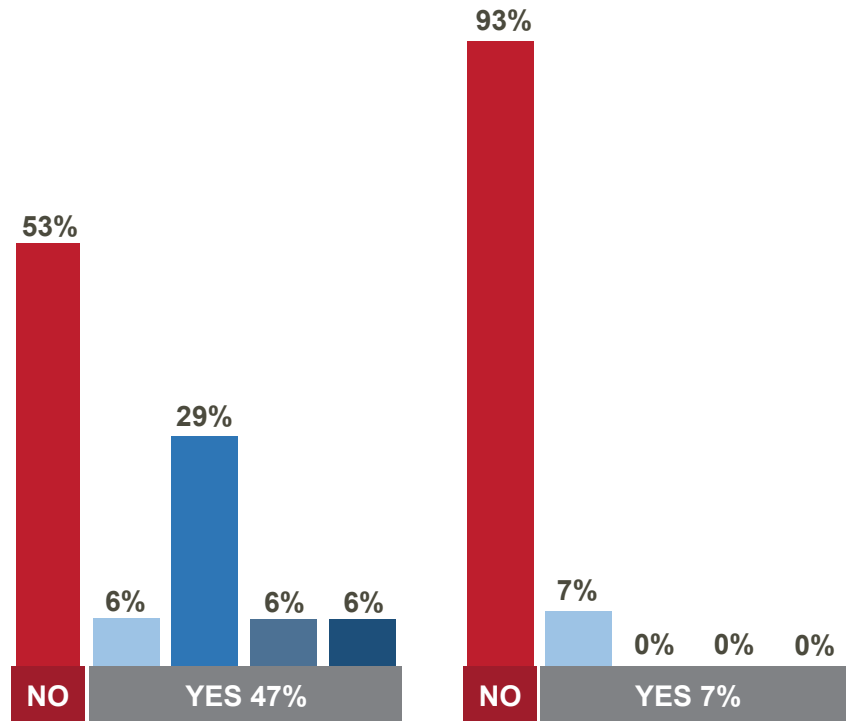


Operating Profits





Did your company implement cost reductions?

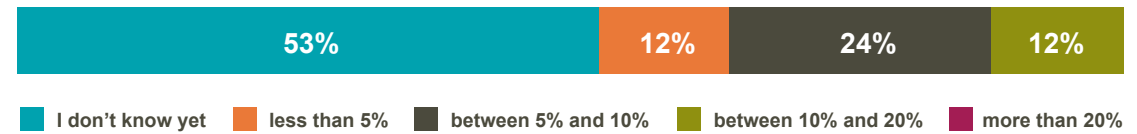


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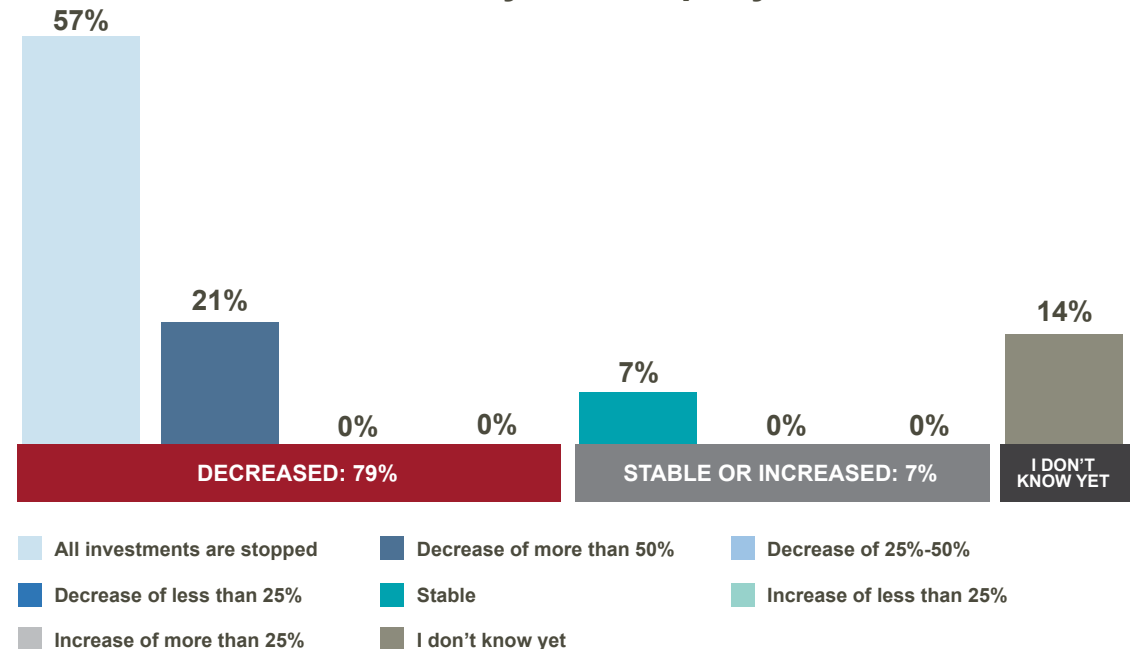
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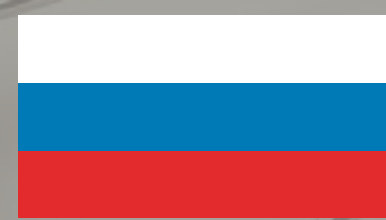


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How is the Covid-19 crisis affecting the level of investment of your company in 2020?





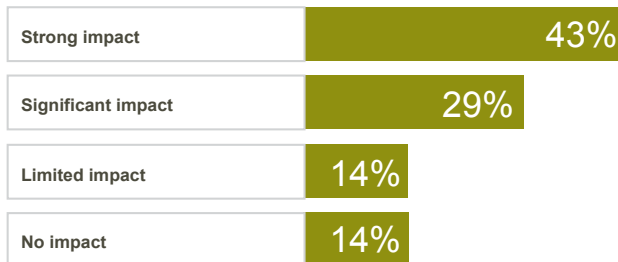
Digitalisation

How would you rate the transition of the exhibition industry?

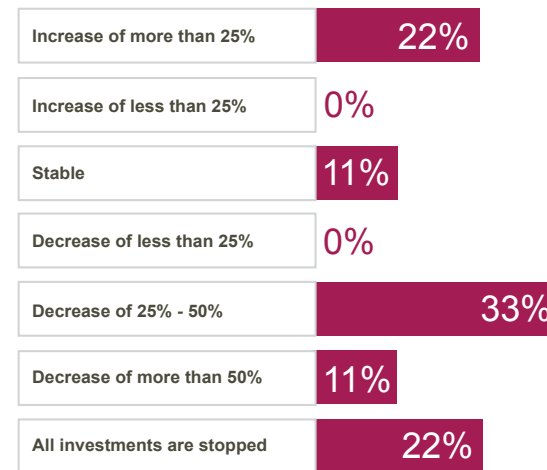
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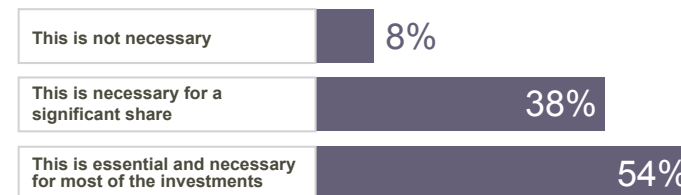
To what extent has Covid-19 impacted your company activities in digitalisation?

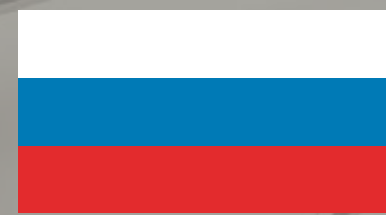


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





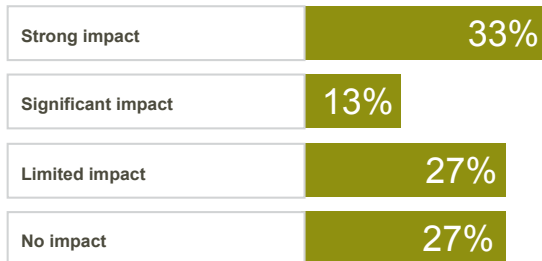
Diversity

How would you rate the transition of the exhibition industry?

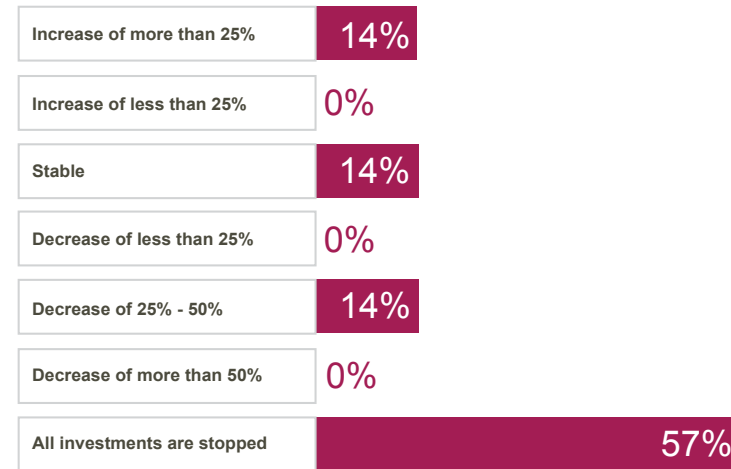
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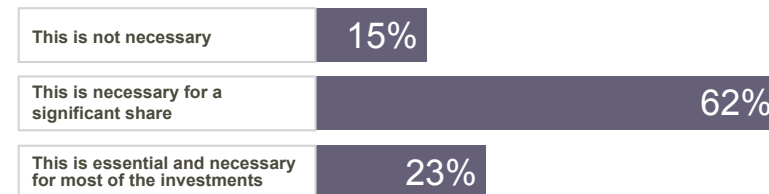
To what extent has Covid-19 impacted your company activities in diversity?

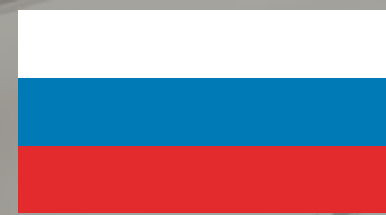


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





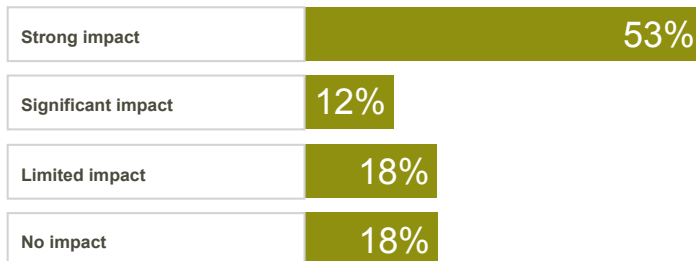
Sustainability

How would you rate the transition of the exhibition industry?

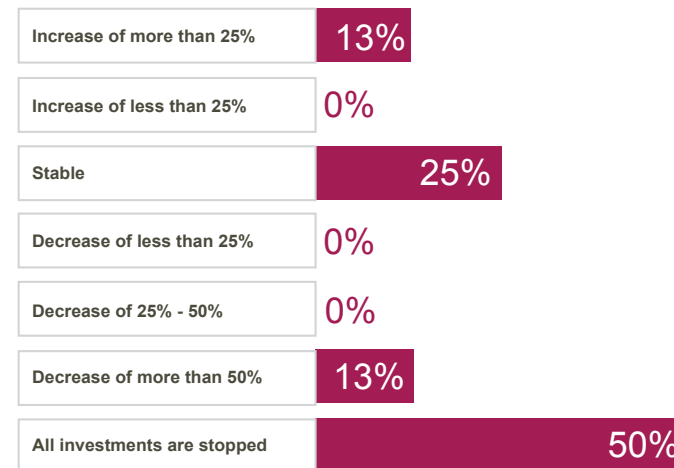
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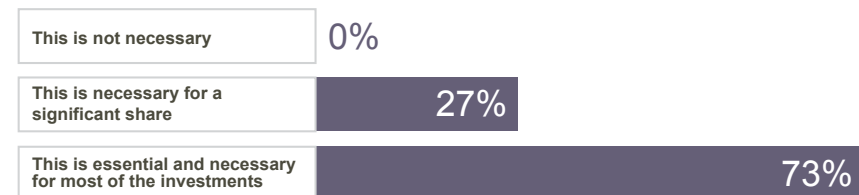
To what extent has Covid-19 impacted your company activities in sustainability?

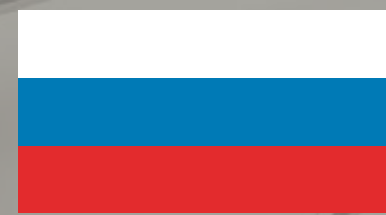


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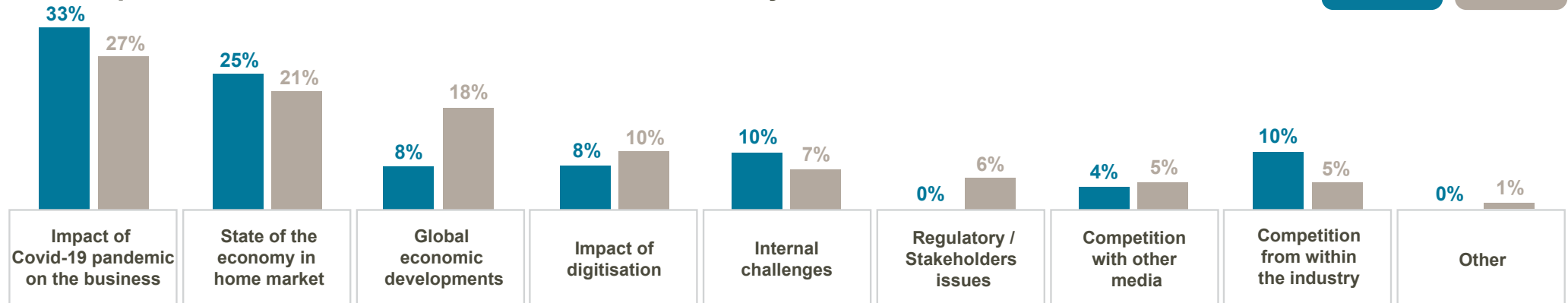




Most important business issues in the exhibition industry

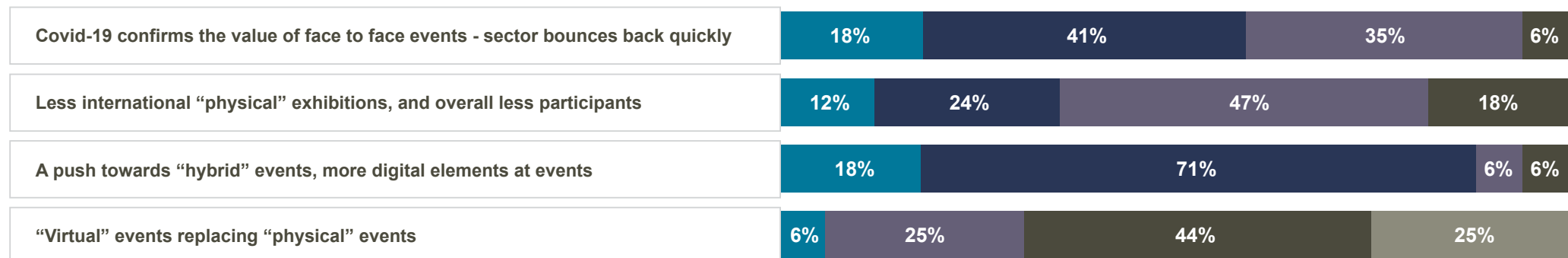
Russia

Global



Format of exhibitions in the coming years

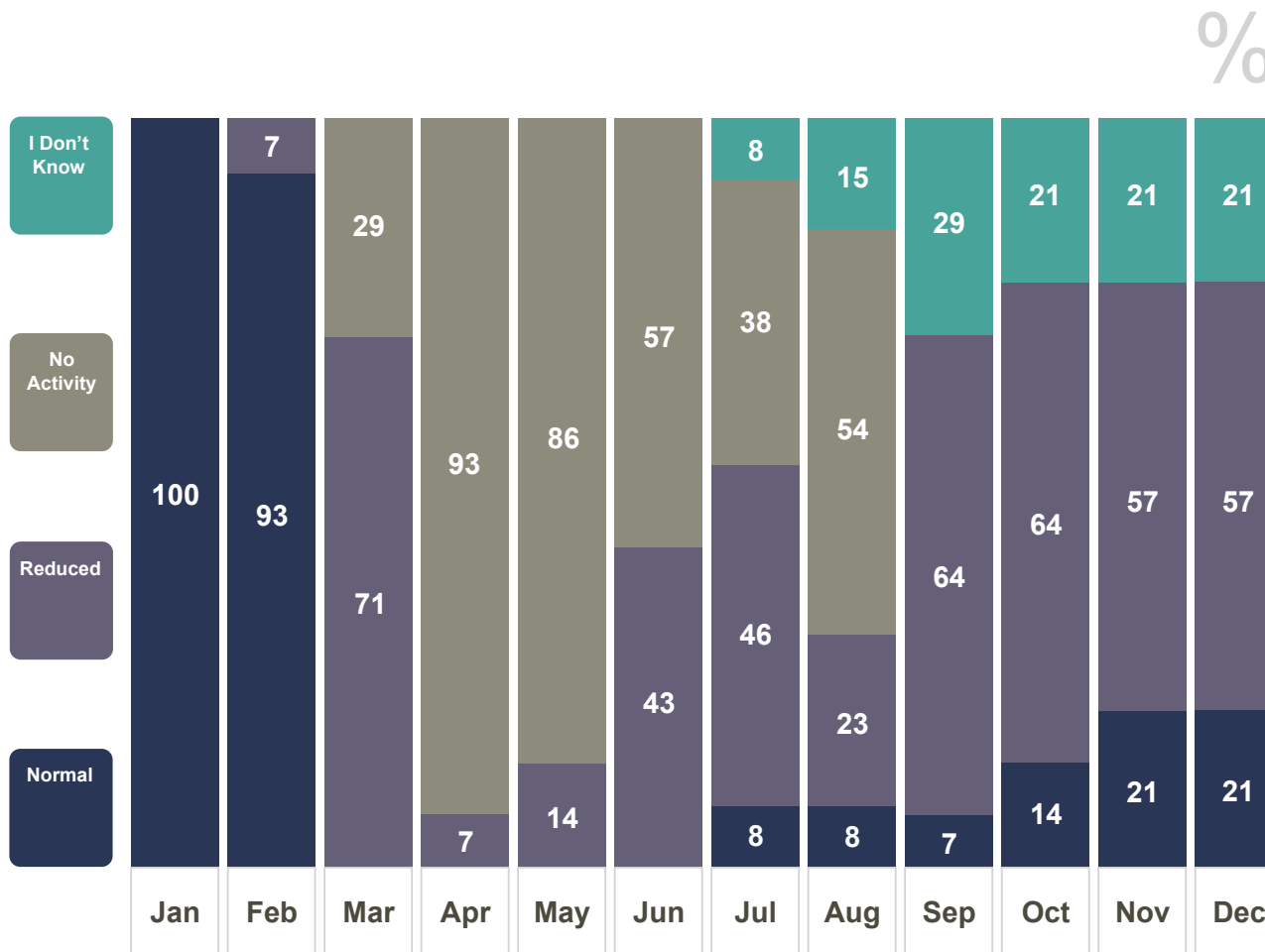
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not



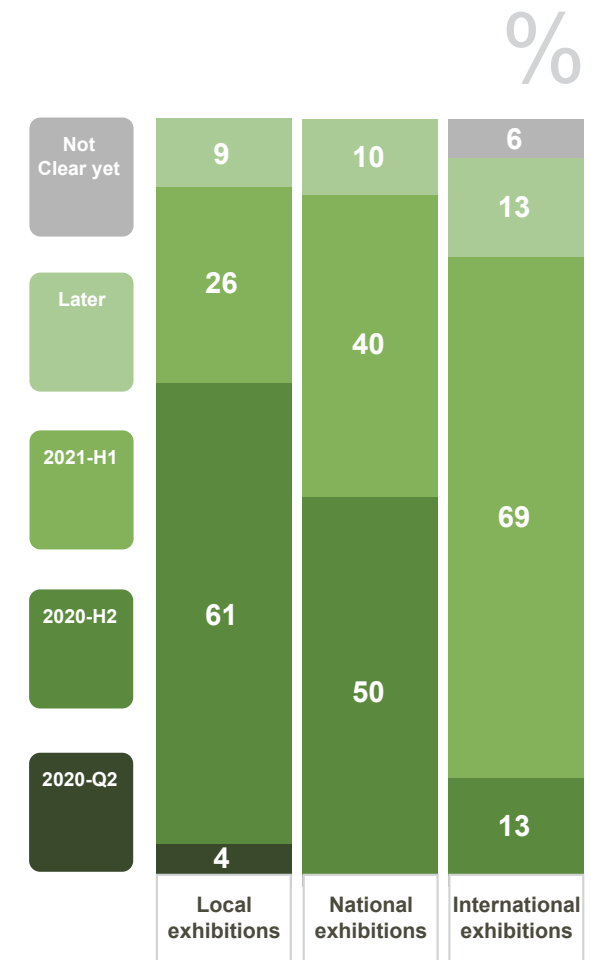
Detailed results for Spain



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

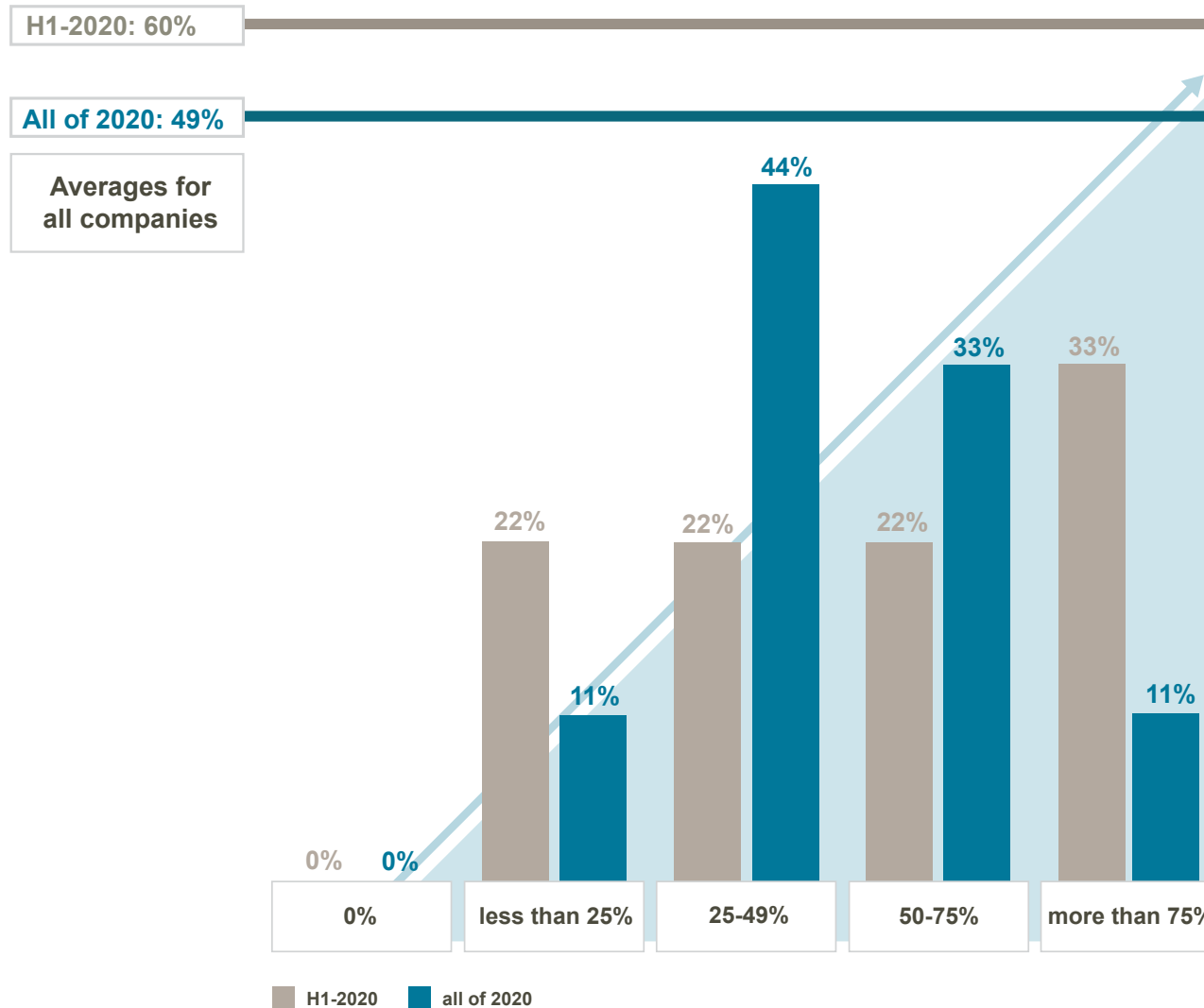


When do you believe exhibitions will open again in your city?

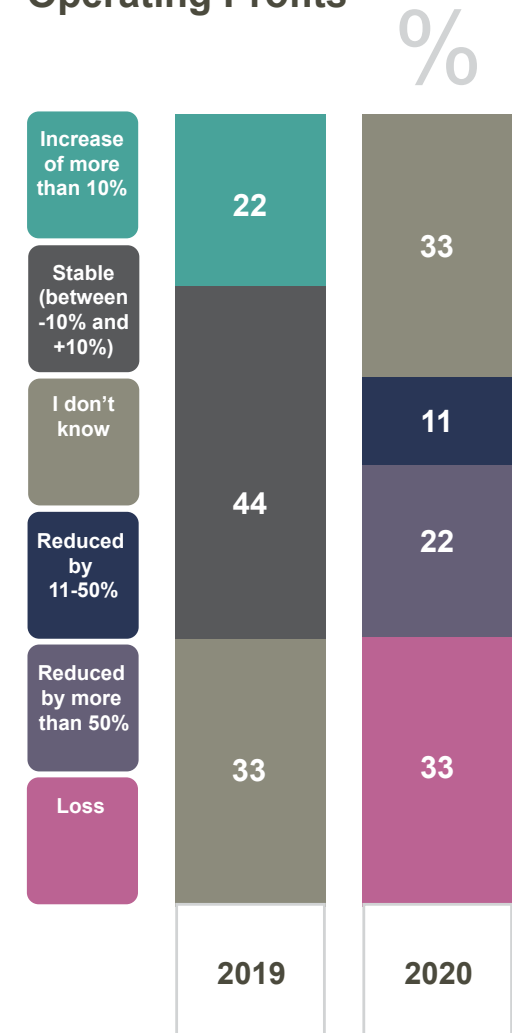




Revenue compared to last year (2019)



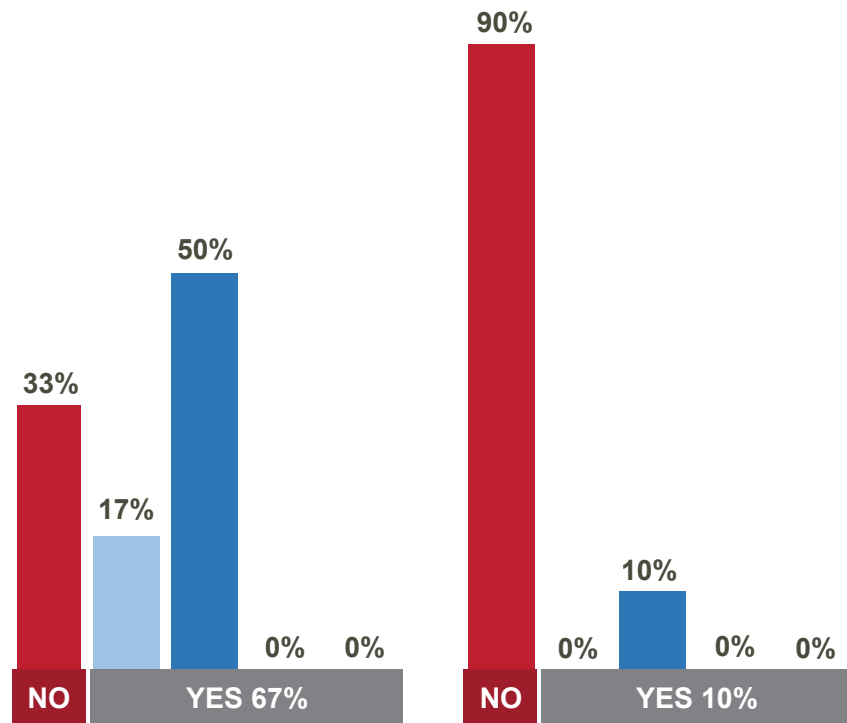
Operating Profits



Detailed results for Spain

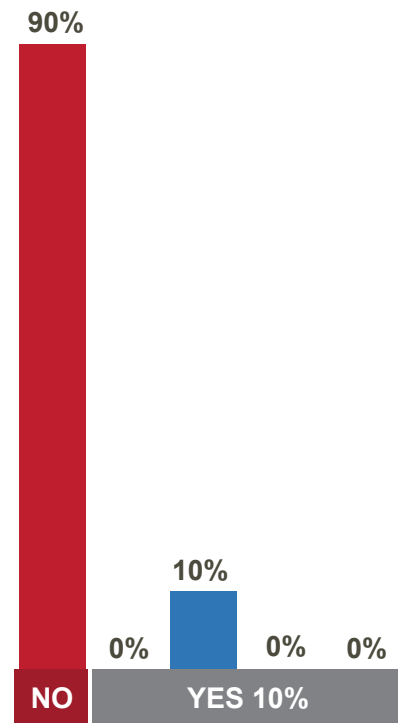


Did your company implement cost reductions?

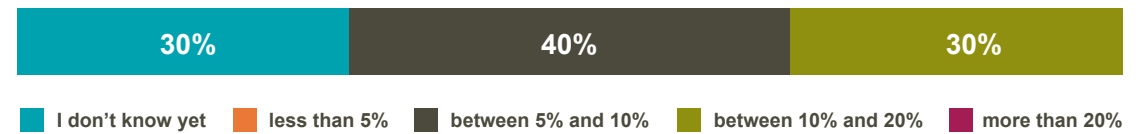


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

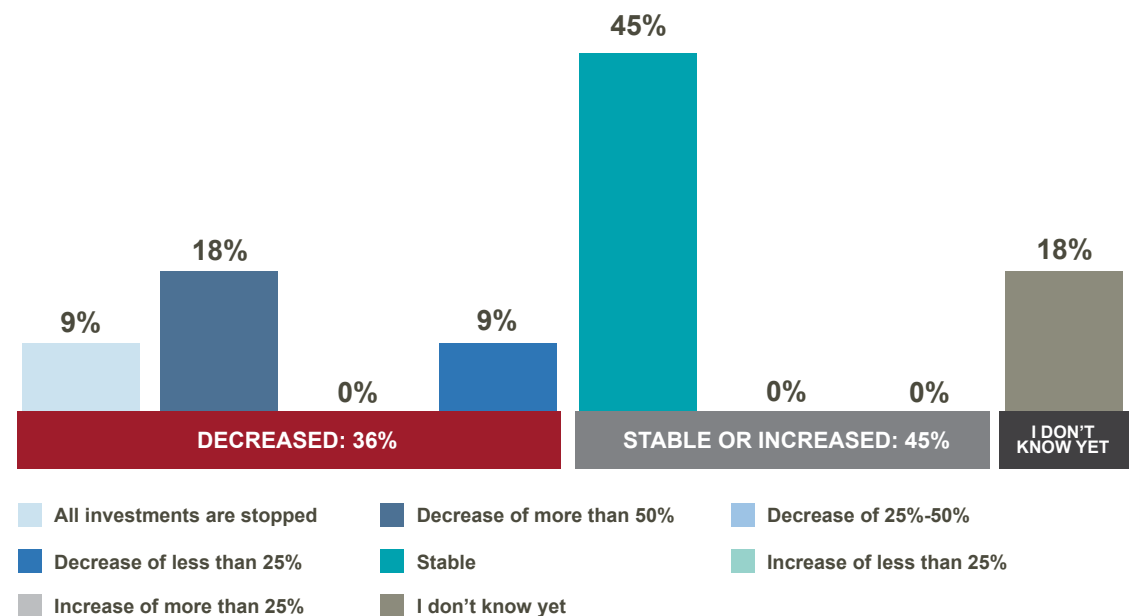
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





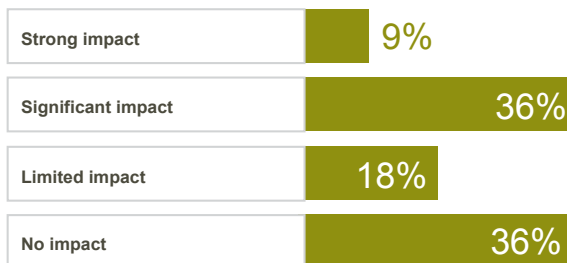
Digitalisation

How would you rate the transition of the exhibition industry?

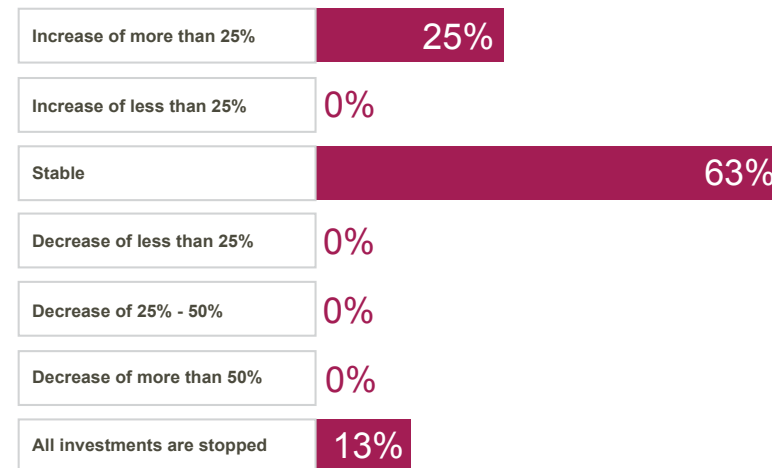
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



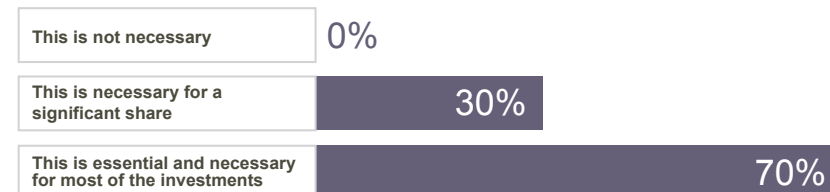
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





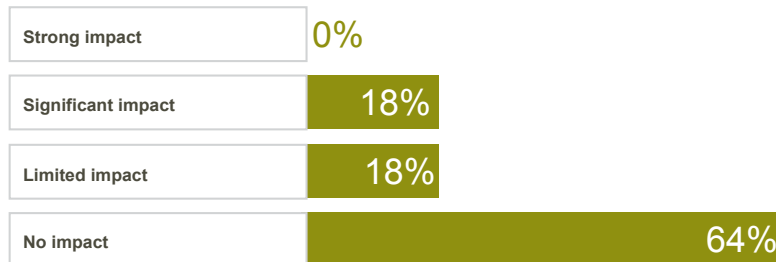
Diversity

How would you rate the transition of the exhibition industry?

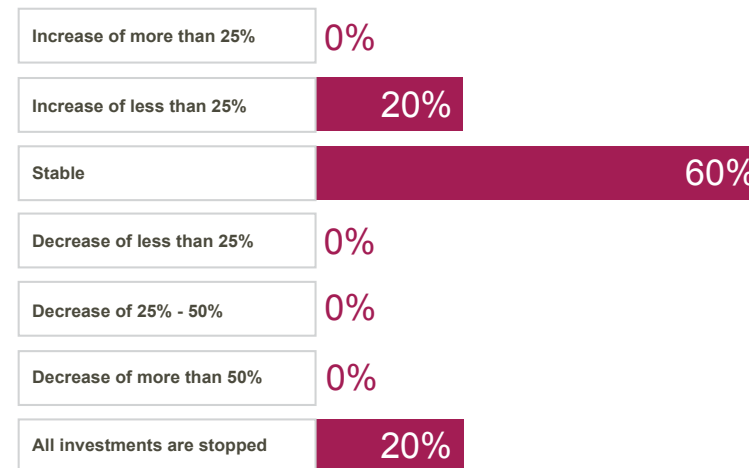
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



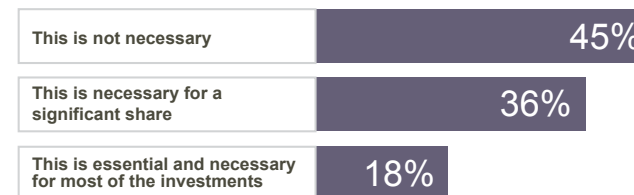
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





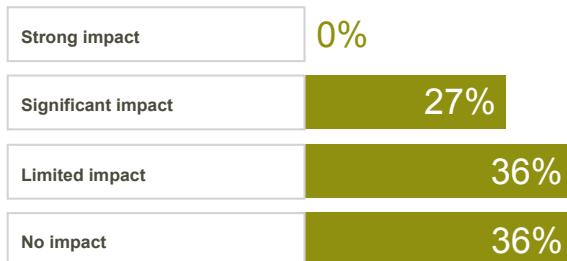
Sustainability

How would you rate the transition of the exhibition industry?

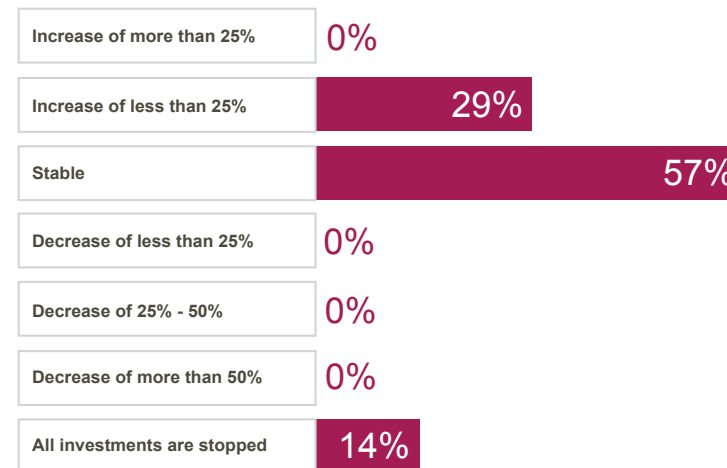
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



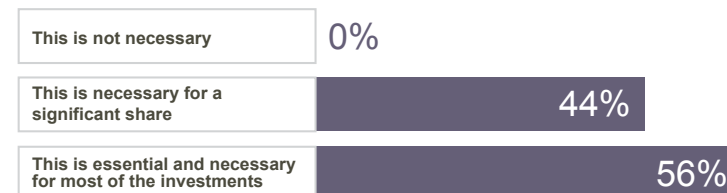
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?



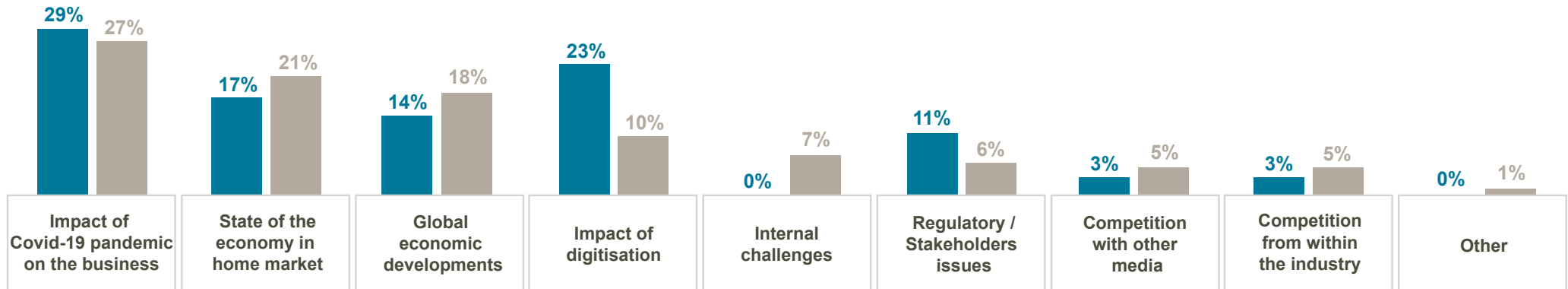
Detailed results for Spain



Most important business issues in the exhibition industry

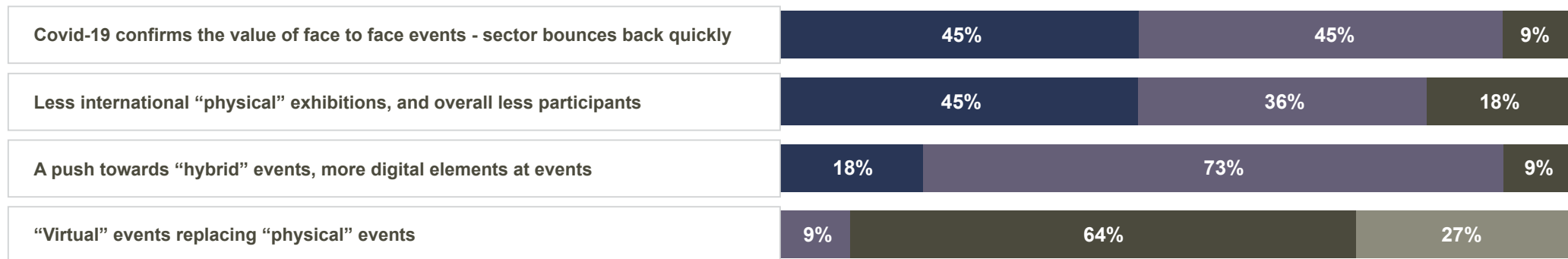
Spain

Global



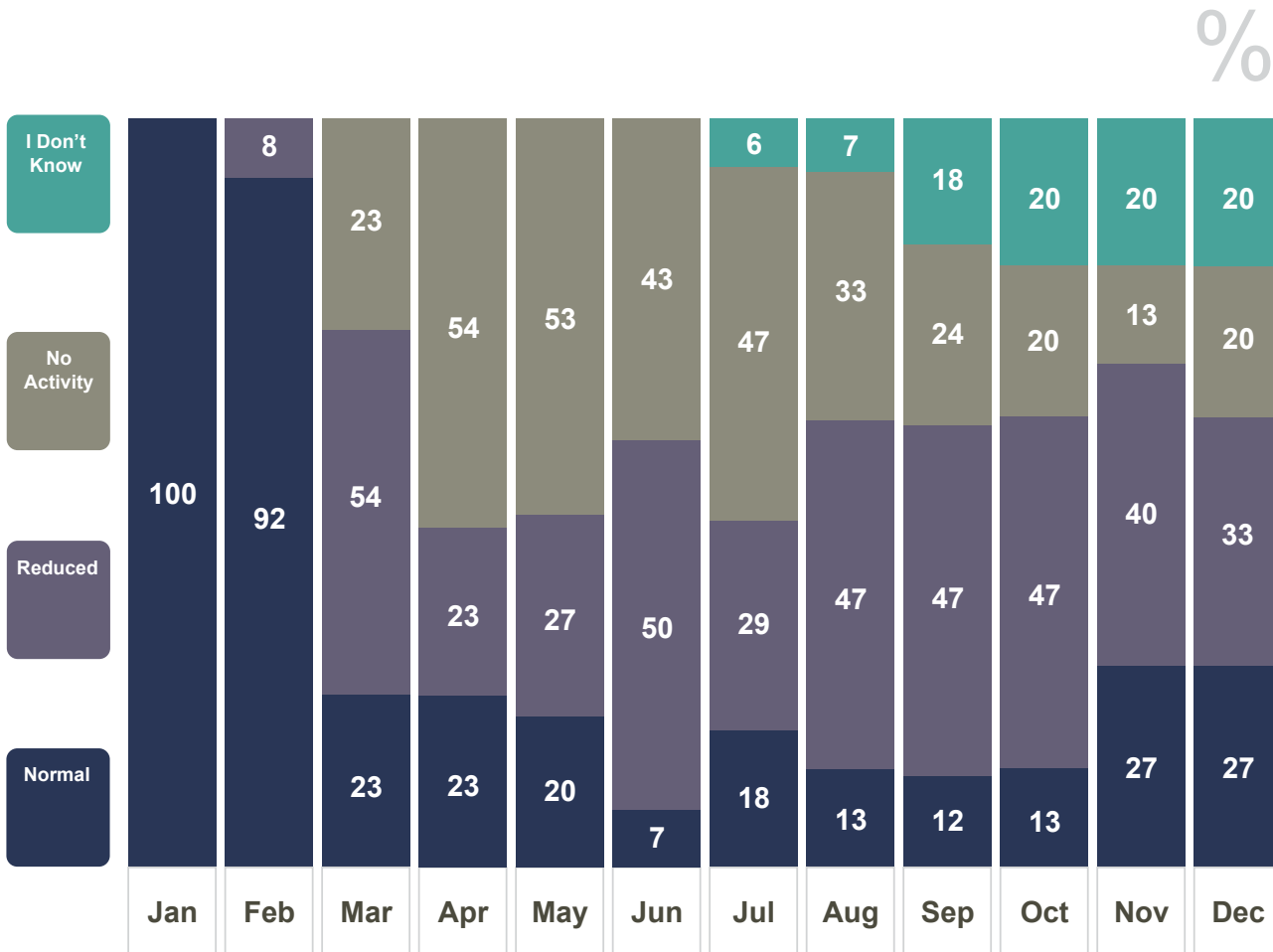
Format of exhibitions in the coming years

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

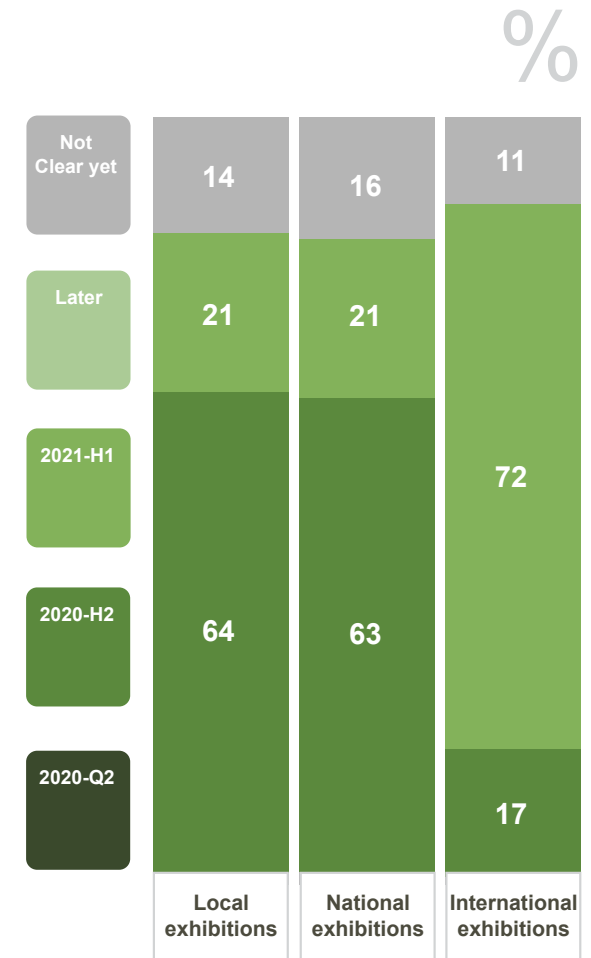




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

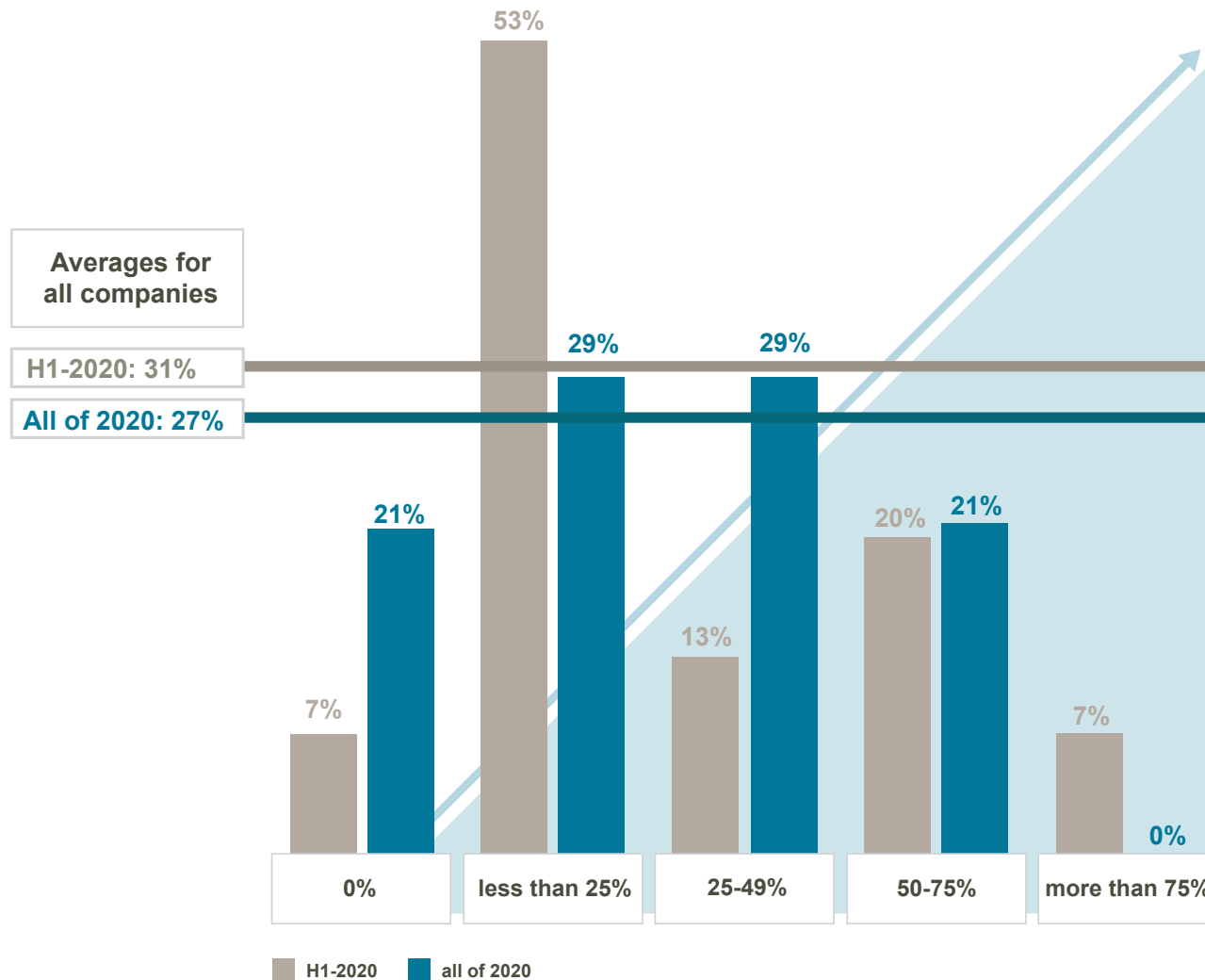


When do you believe exhibitions will open again in your city?

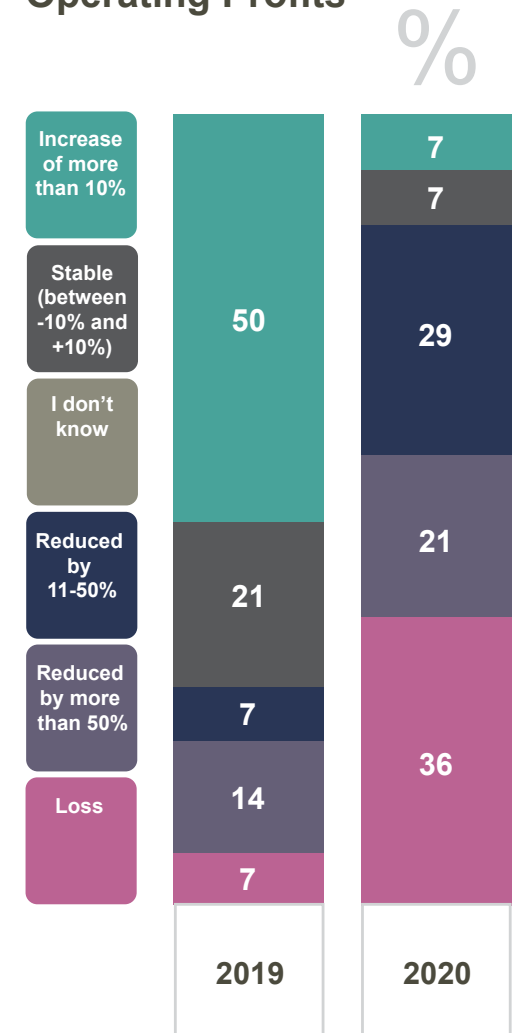


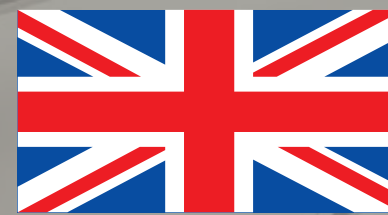


Revenue compared to last year (2019)

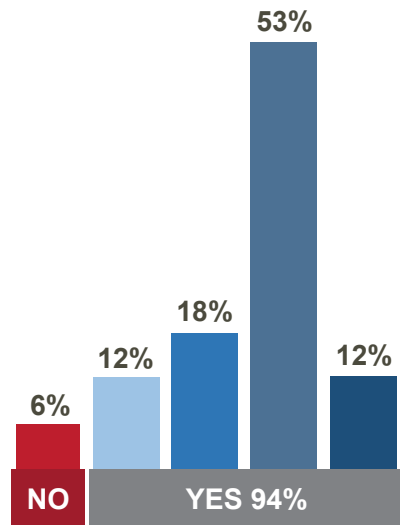


Operating Profits



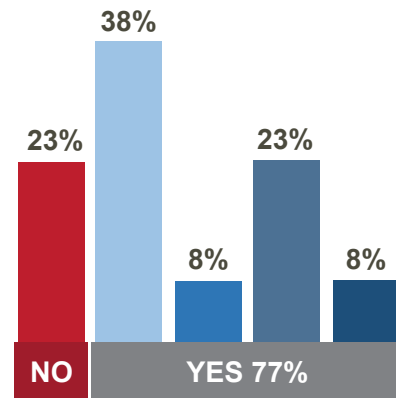


Did your company implement cost reductions?



- No
- Yes, for less than 10% of our 2019 overall costs
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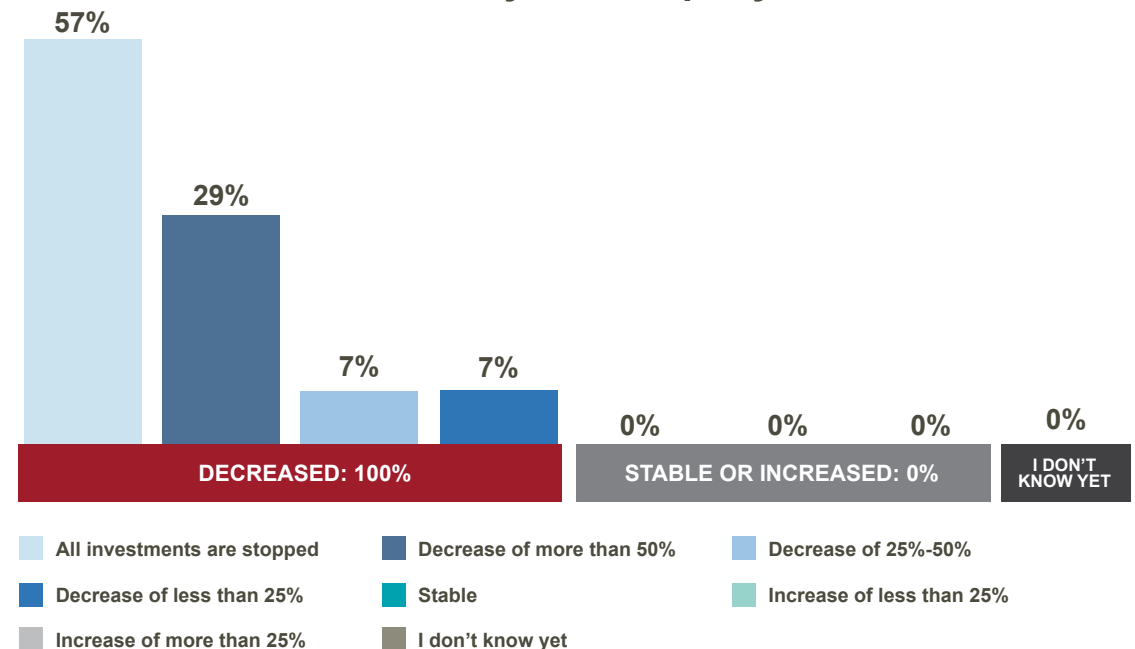
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





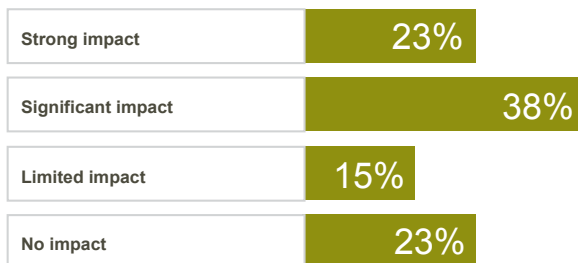
Digitalisation

How would you rate the transition of the exhibition industry?

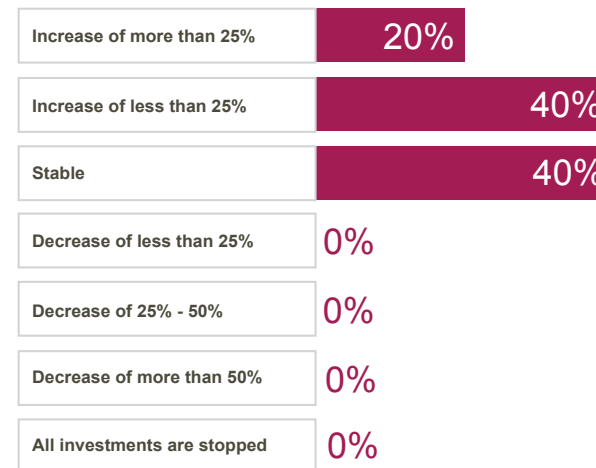
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



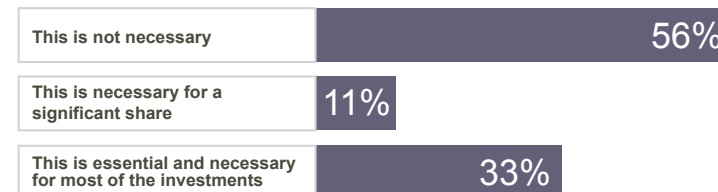
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





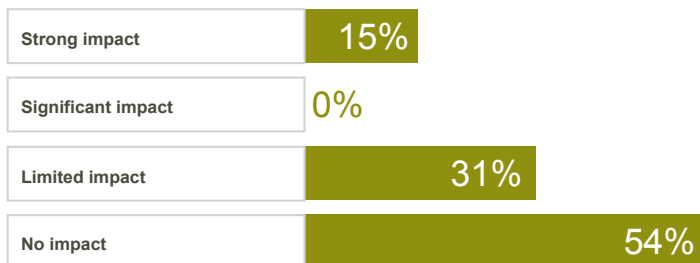
Diversity

How would you rate the transition of the exhibition industry?

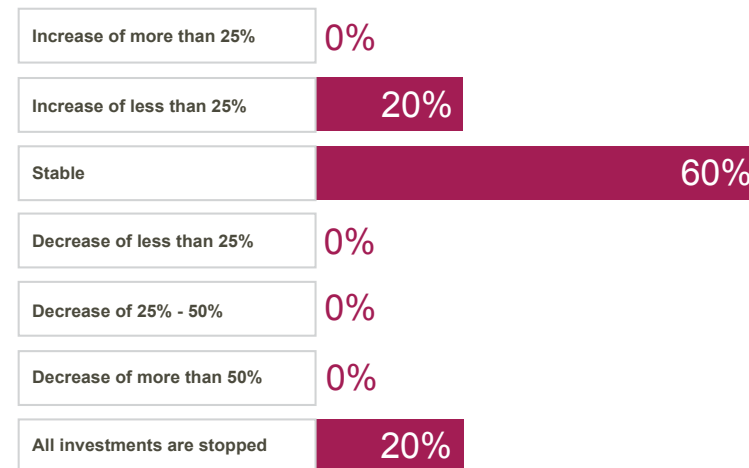
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



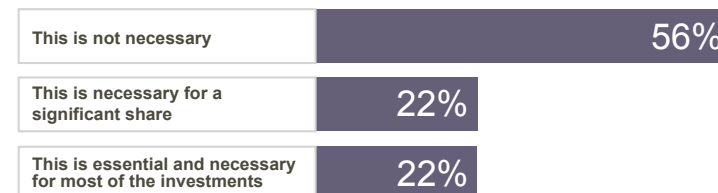
To what extent has Covid-19 impacted your company activities in diversity?

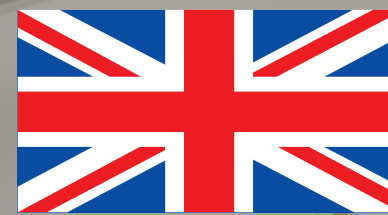


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





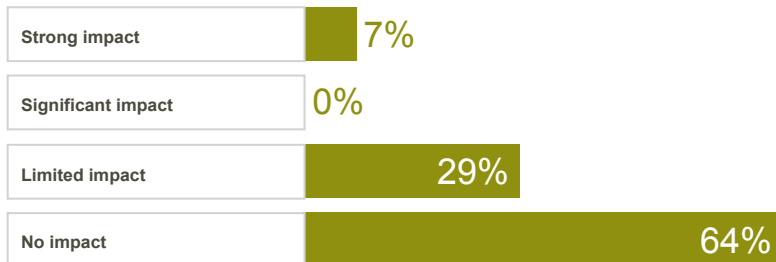
Sustainability

How would you rate the transition of the exhibition industry?

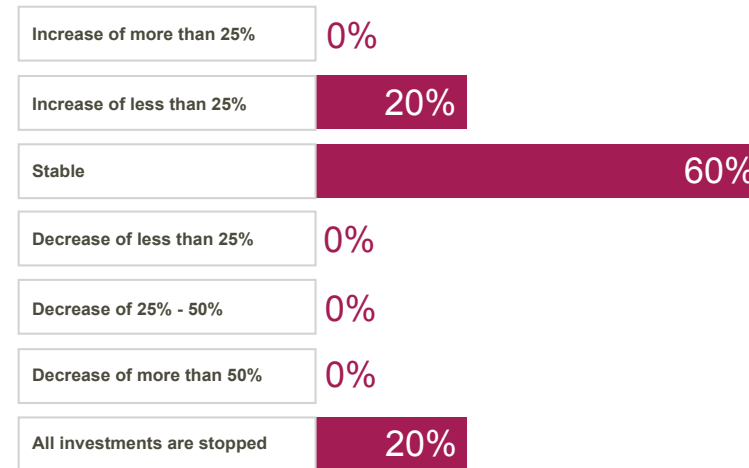
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in sustainability?

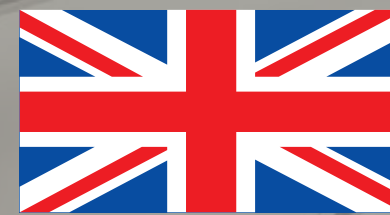


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



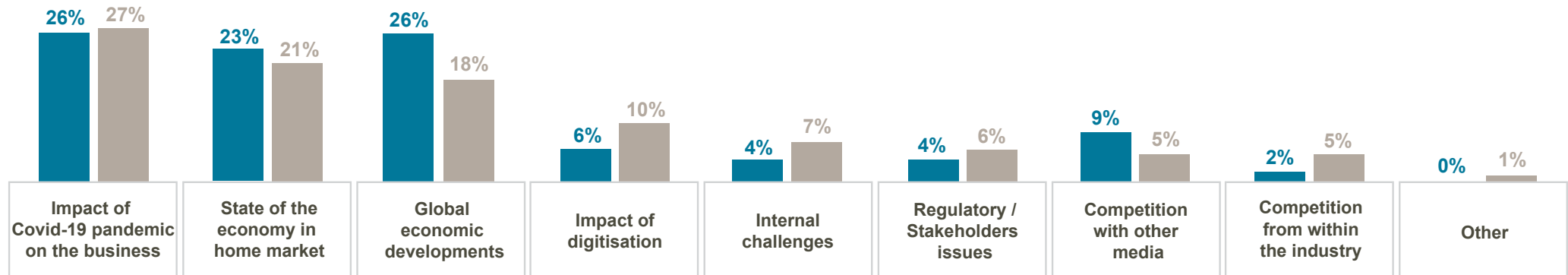
To what degree would you welcome some public investments in sustainability?





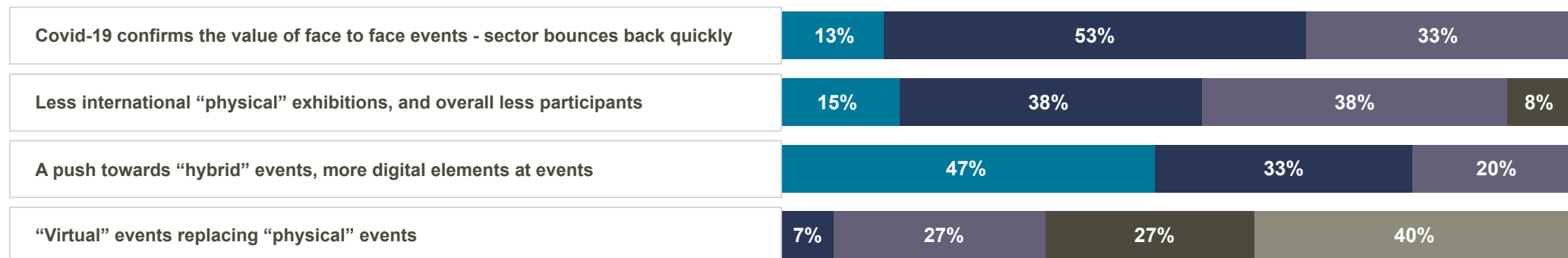
Most important business issues in the exhibition industry

UK Global



Format of exhibitions in the coming years

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

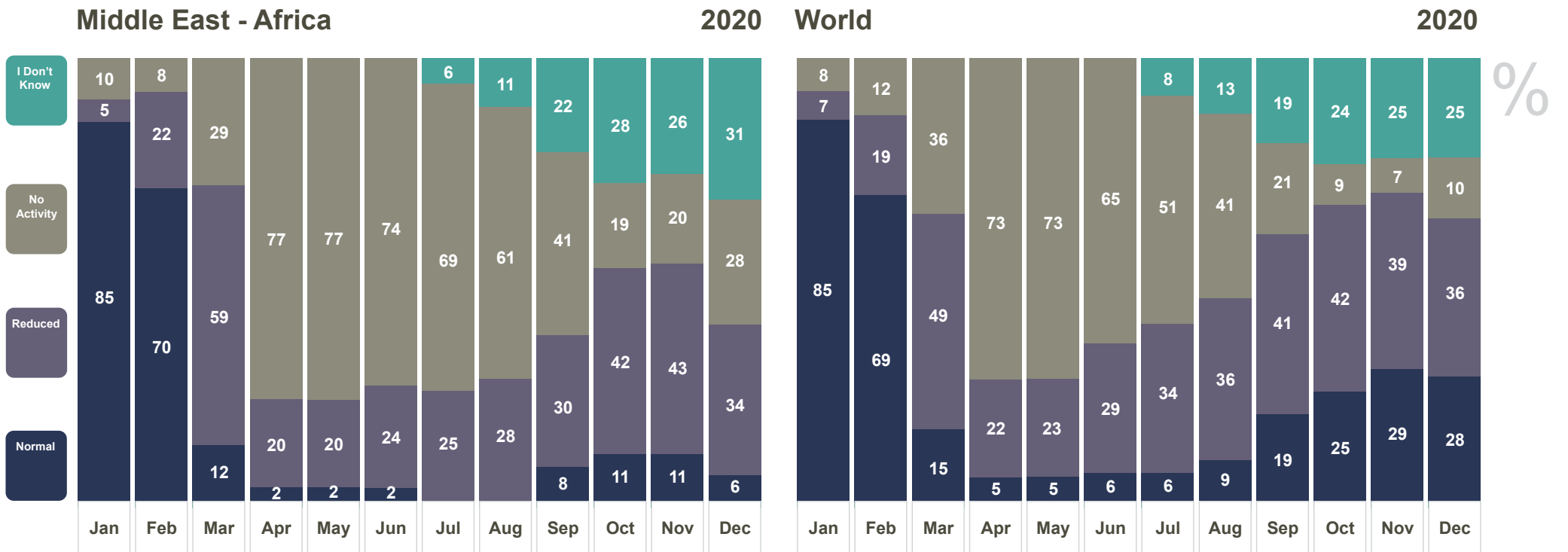


Middle East - Africa





Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



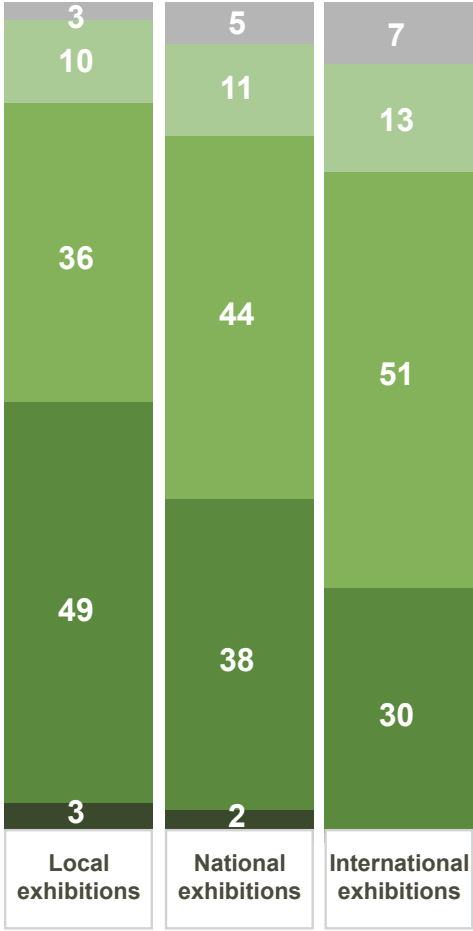
Reopening Exhibitions Middle East - Africa



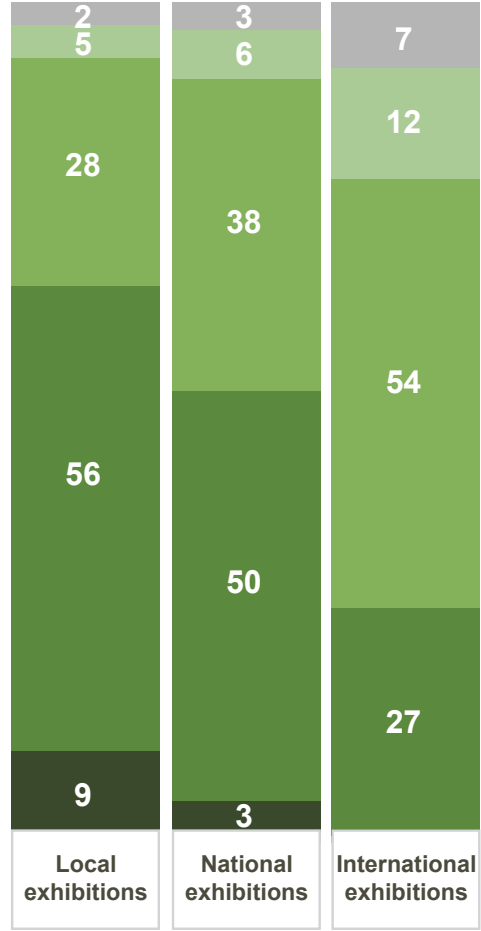
When do you believe exhibitions will open again in your city?



Middle East - Africa



World

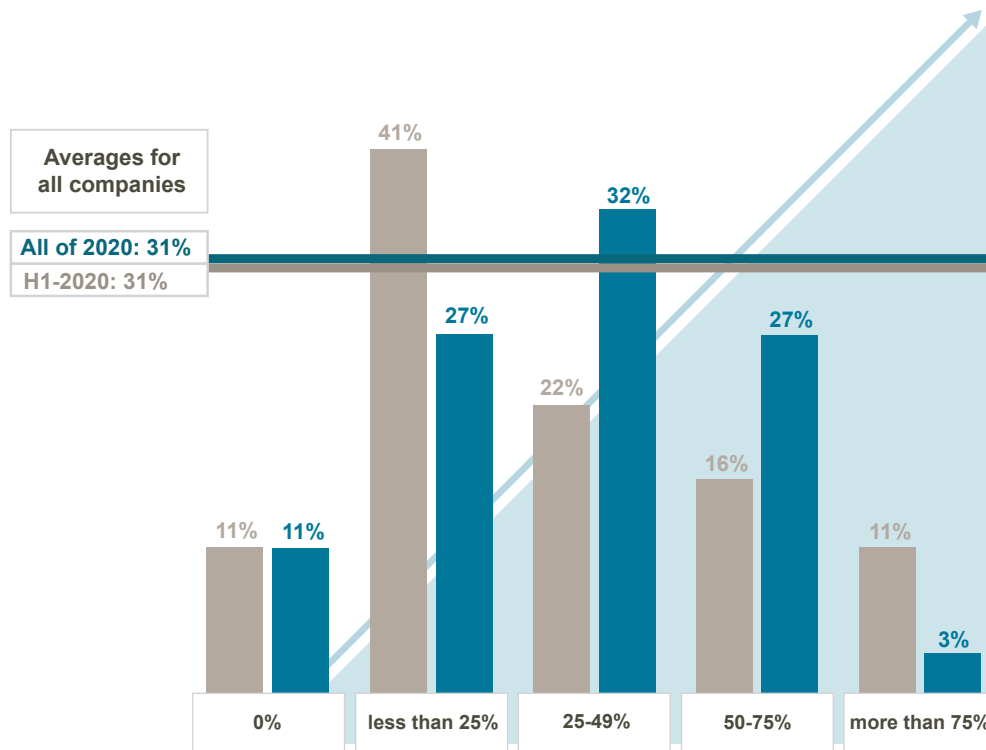


%

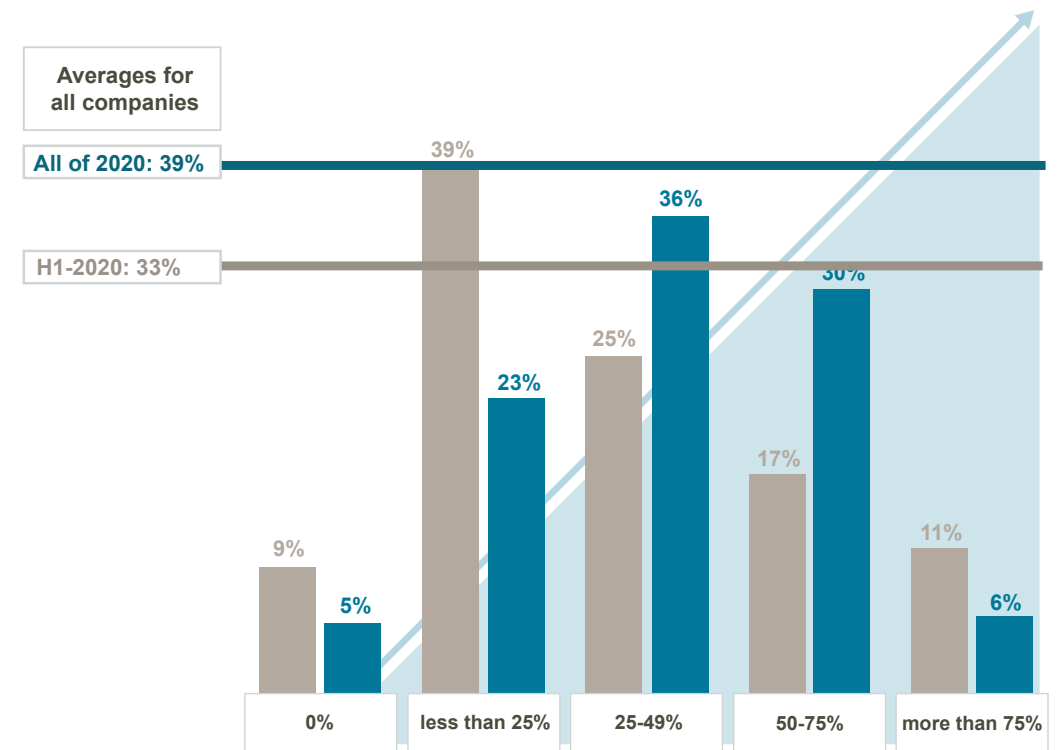


Revenue compared to last year (2019)

Middle East - Africa

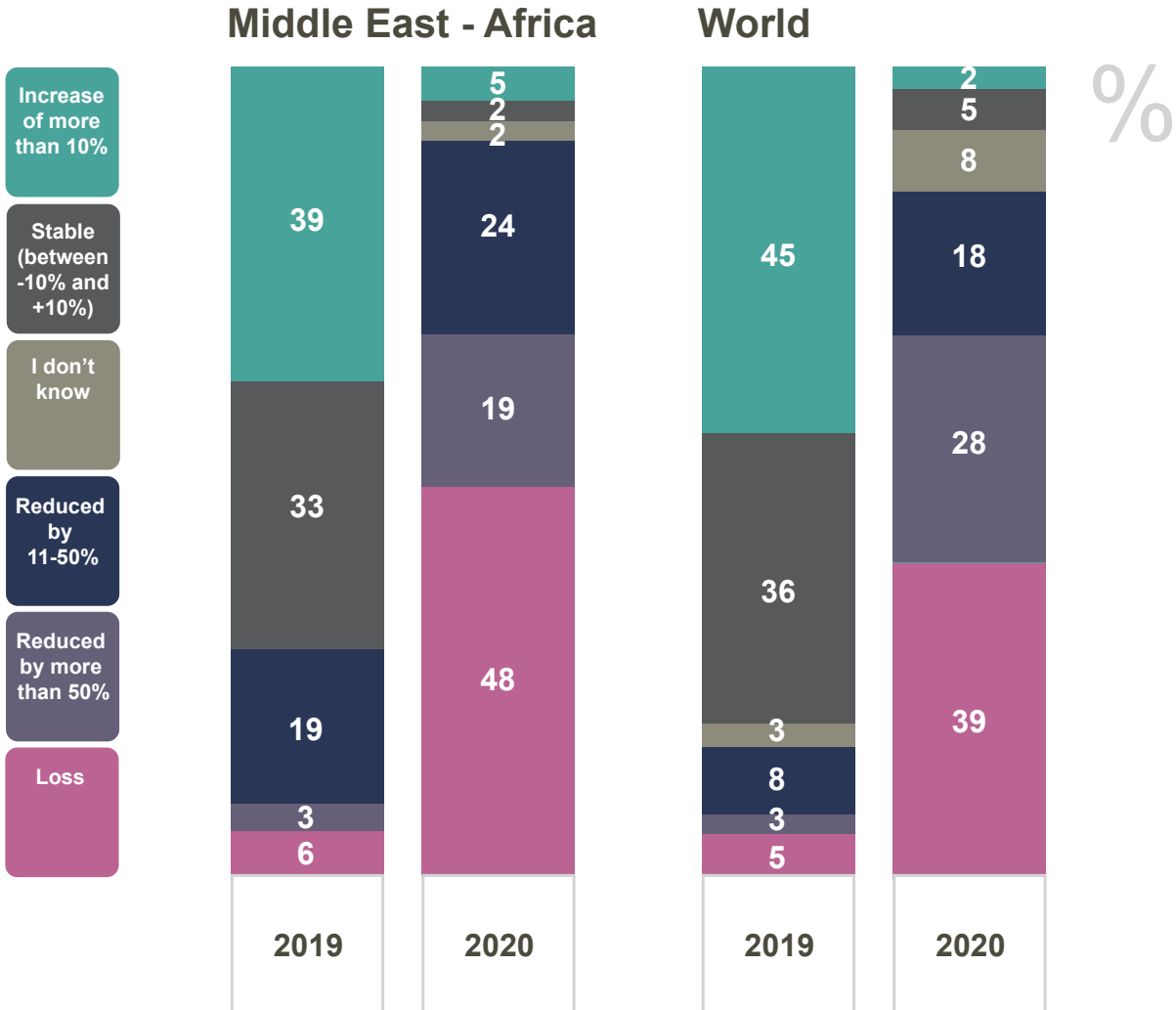


World



■ H1-2020 ■ all of 2020

Operating profits Middle East - Africa



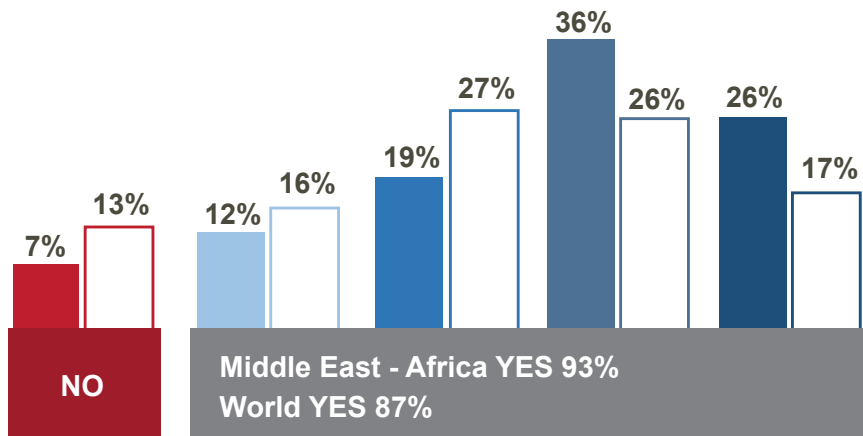
Cost Reductions - Public Financial Support Middle East - Africa



Did your company implement cost reductions?

Middle East - Africa

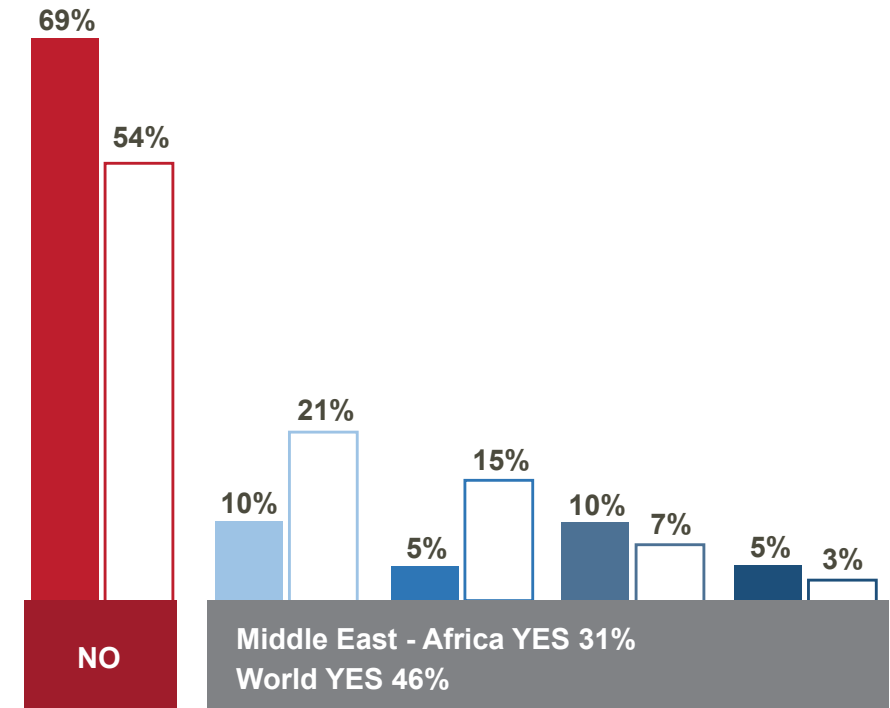
World



Did your company benefit from public financial support?

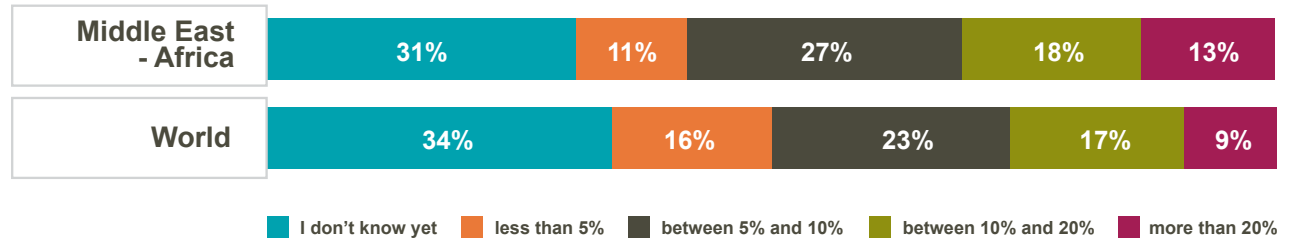
Middle East - Africa

World



■ No
 ■ Yes, for less than 10% of our 2019 overall costs
 ■ Yes, for between 10% and 25% of our 2019 overall costs
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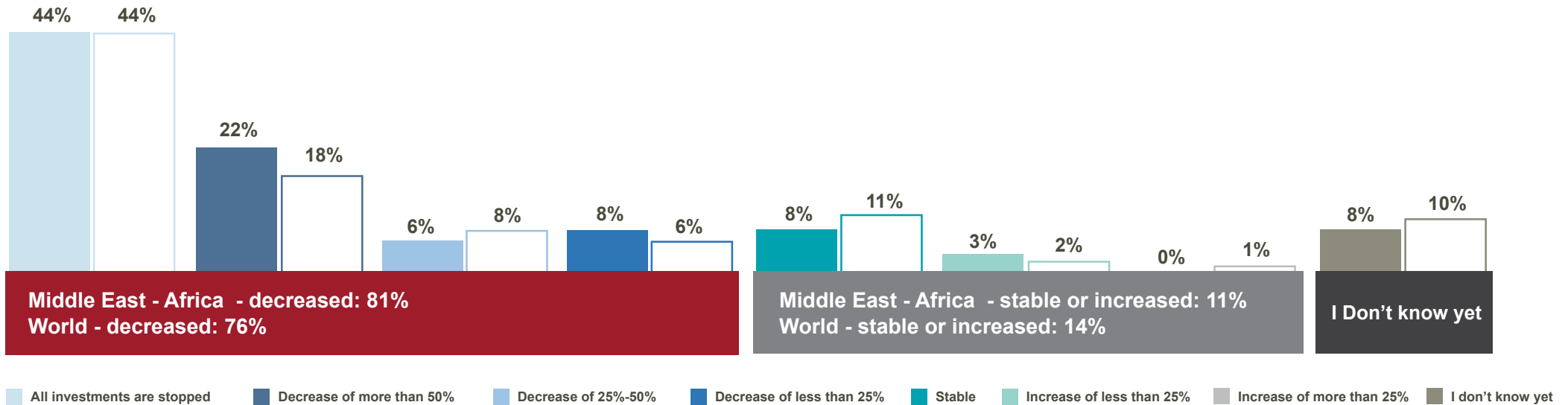
Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?

Middle East - Africa

World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Middle East - Africa

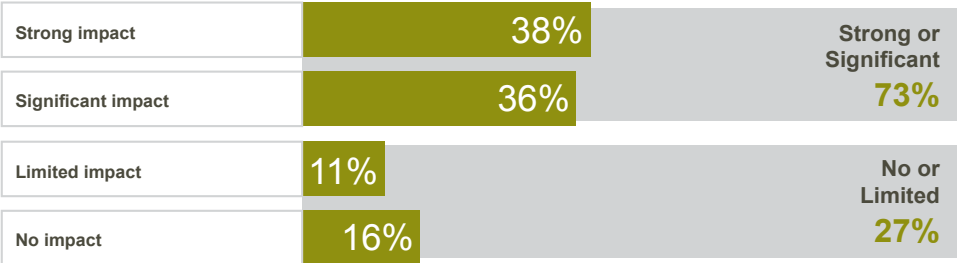


World

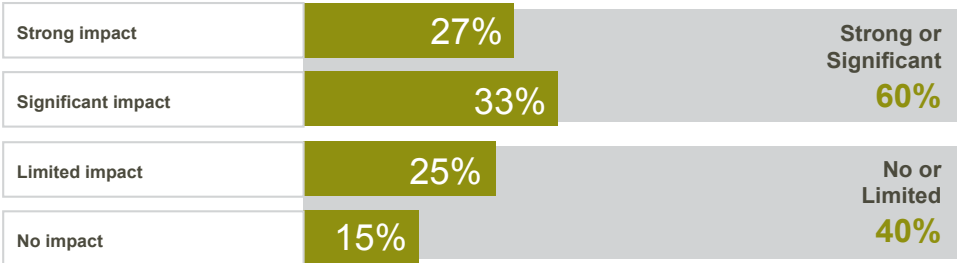


To what extent has Covid-19 impacted your company activities in digitalisation?

Middle East - Africa



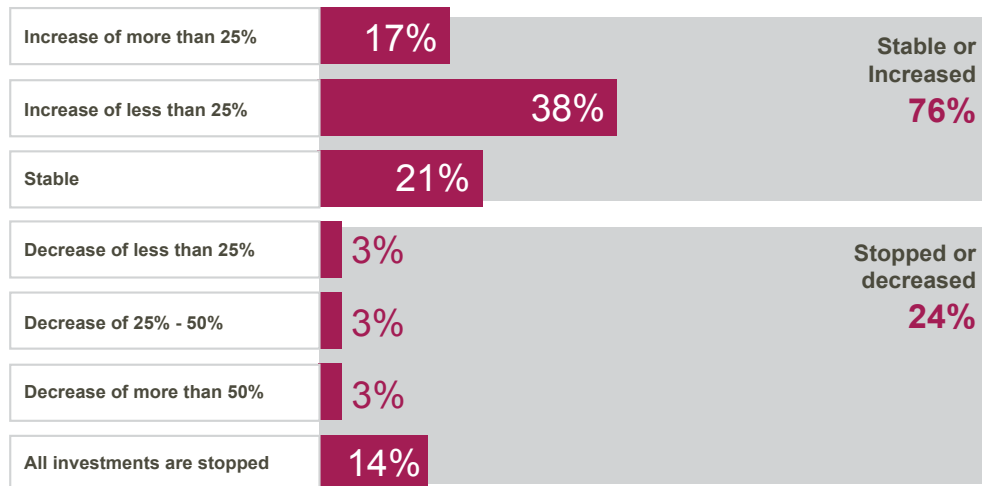
World



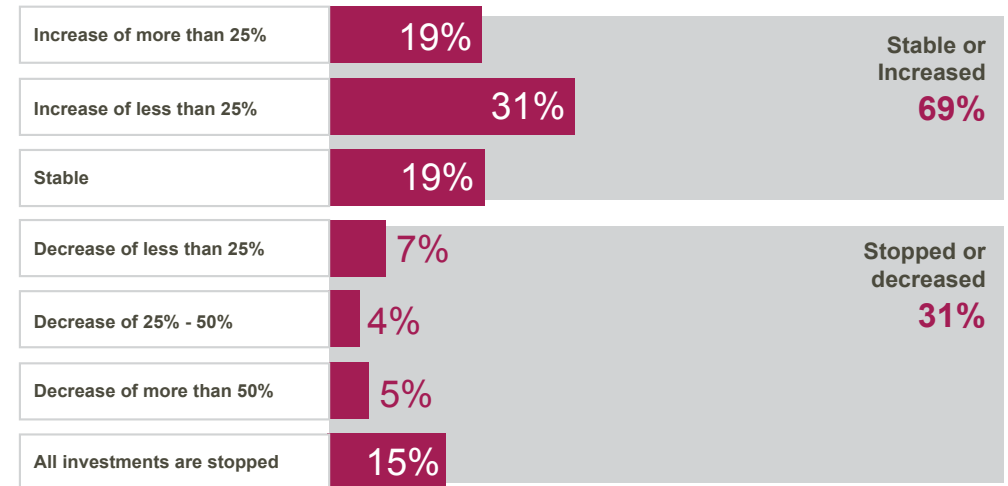


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?

Middle East - Africa

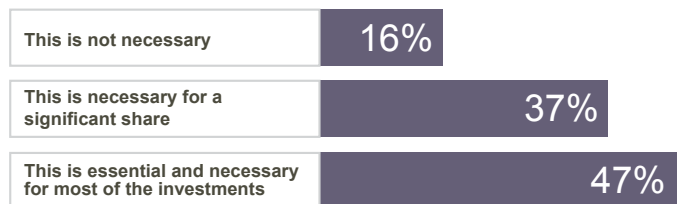


World

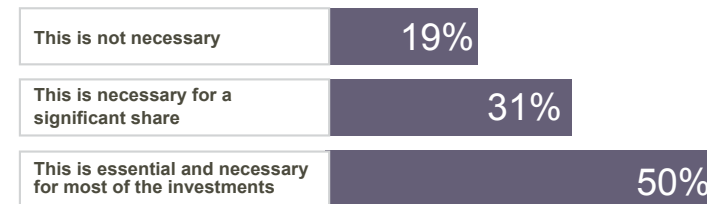


To what degree would you welcome some public investments in digitalisation?

Middle East - Africa



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Middle East - Africa

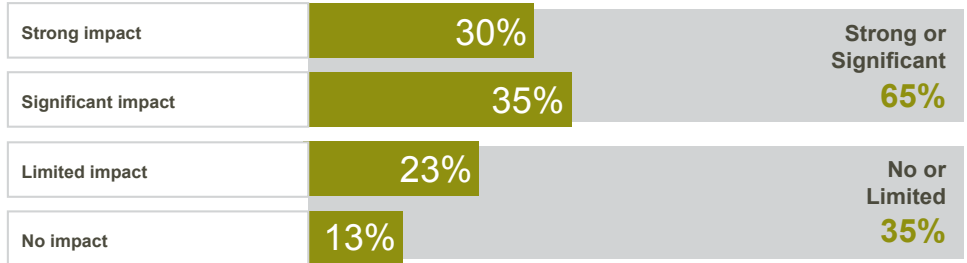


World

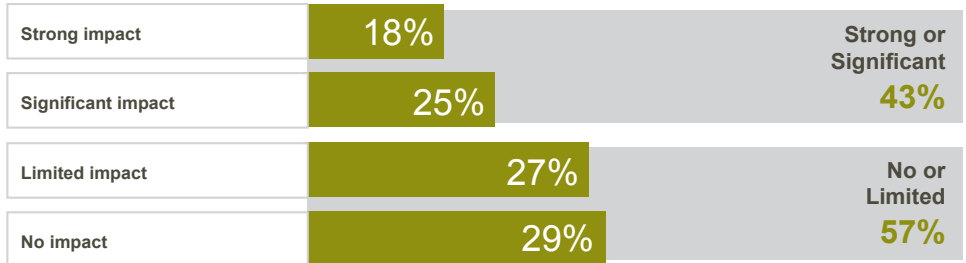


To what extent has Covid-19 impacted your company activities in diversity?

Middle East - Africa



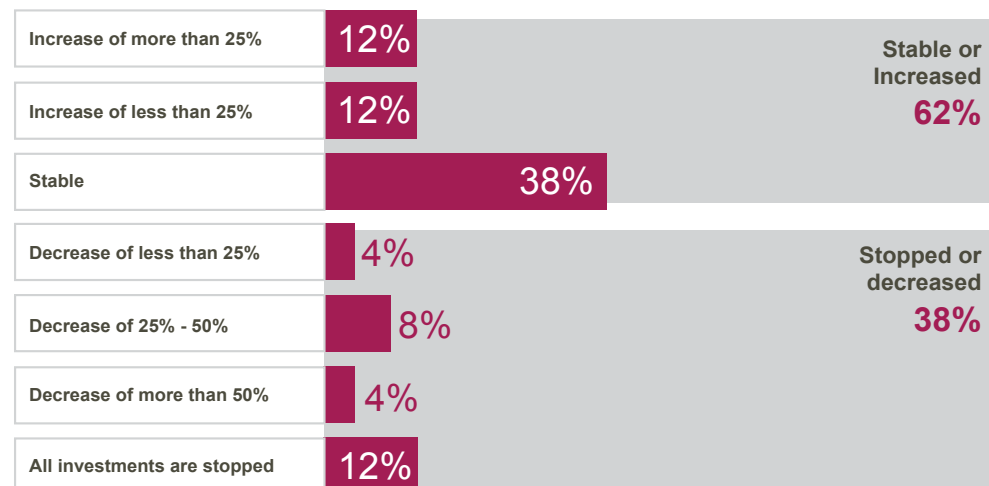
World



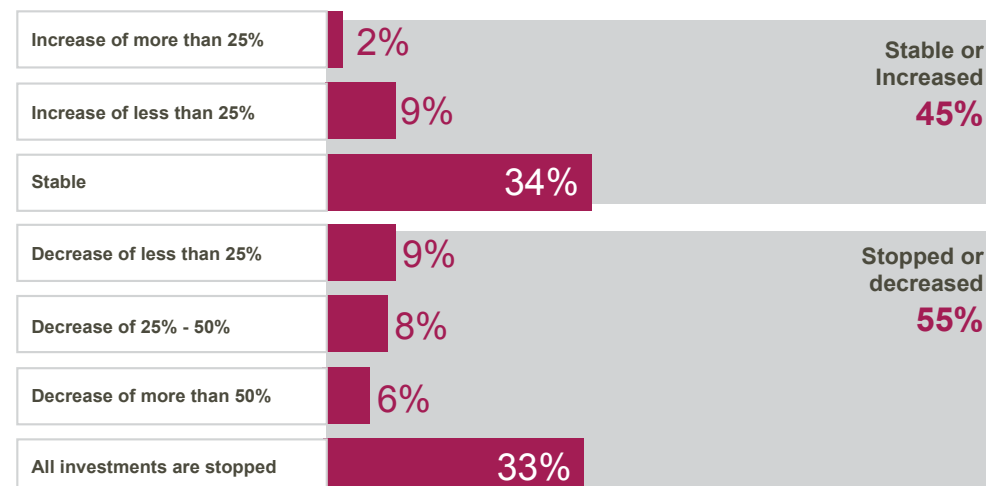


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?

Middle East - Africa



World

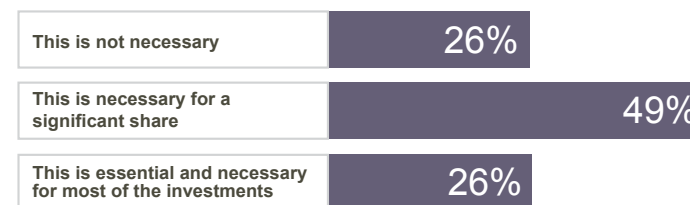


To what degree would you welcome some public investments in diversity?

Middle East - Africa



World





How would you rate the transition of the exhibition industry?

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Middle East - Africa

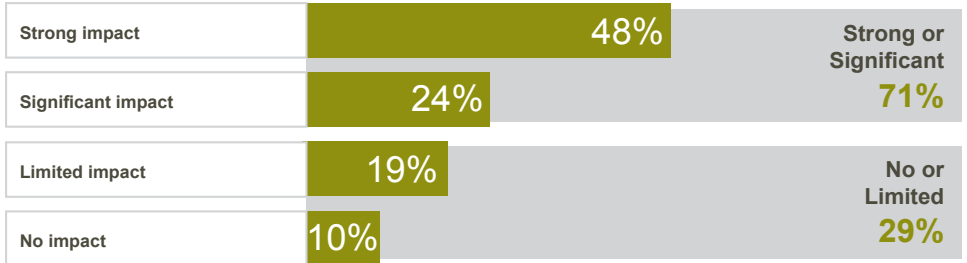


World

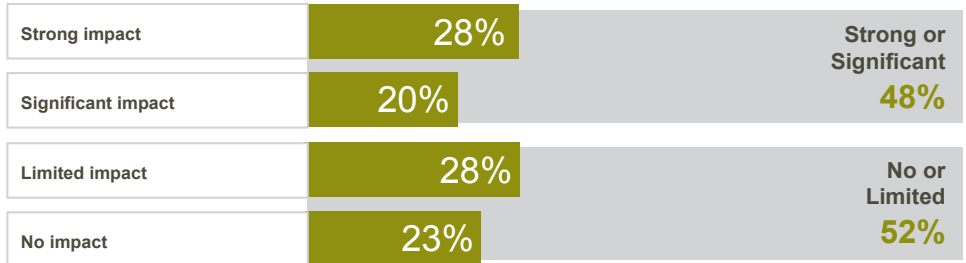


To what extent has Covid-19 impacted your company activities in sustainability?

Middle East - Africa



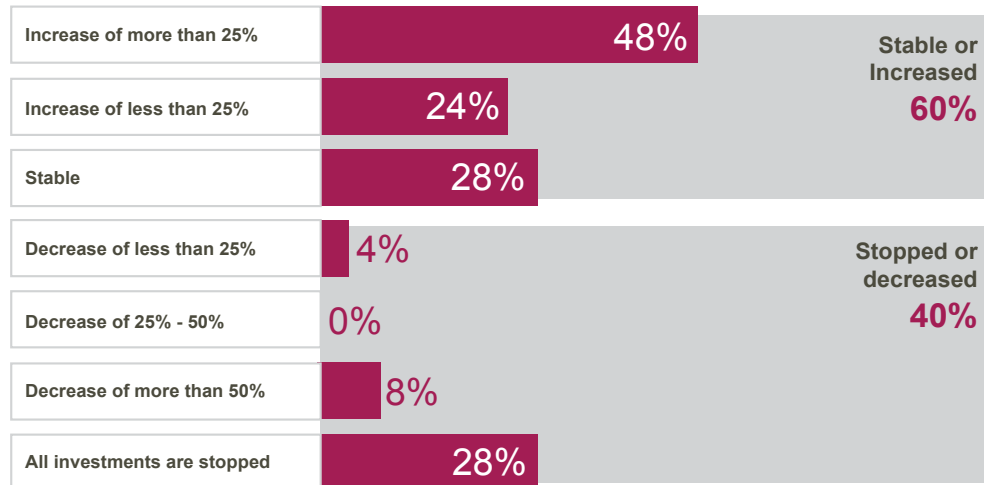
World





How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?

Middle East - Africa

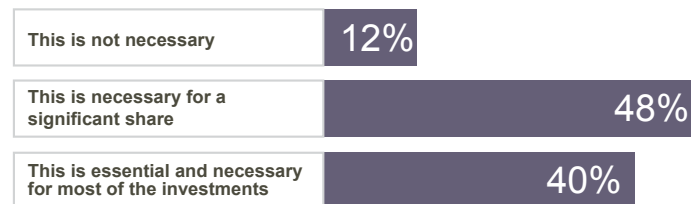


World

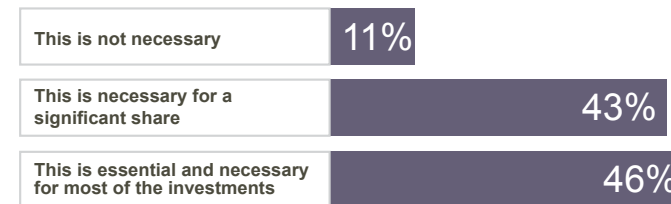


To what degree would you welcome some public investments in sustainability?

Middle East - Africa



World



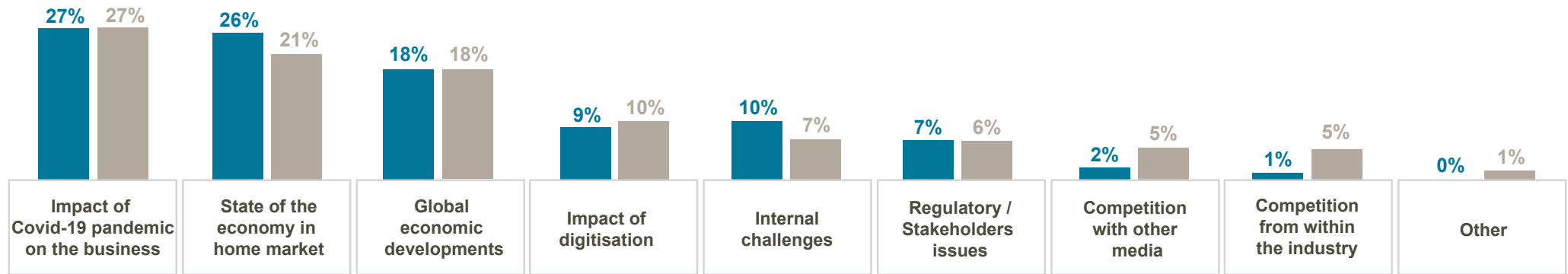
Most Important Business Issues - Format of Exhibitions - Middle East - Africa



Most important business issues in the exhibition industry

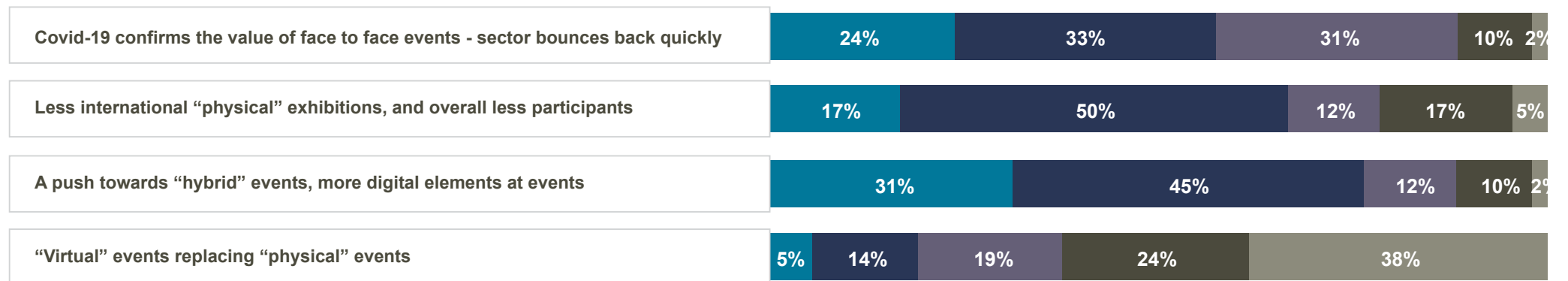
Middle East - Africa

Global



Format of exhibitions in the coming years

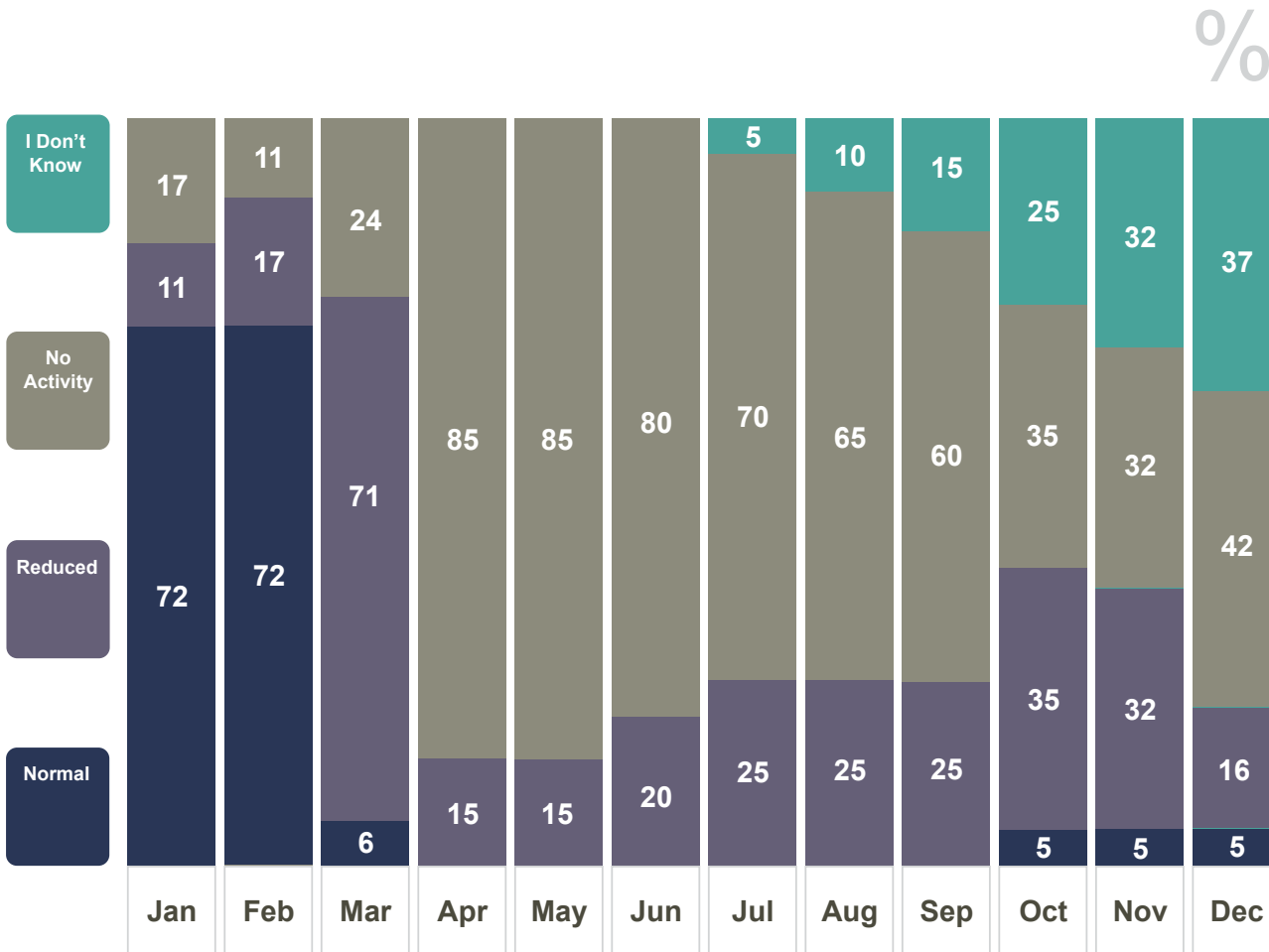
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not



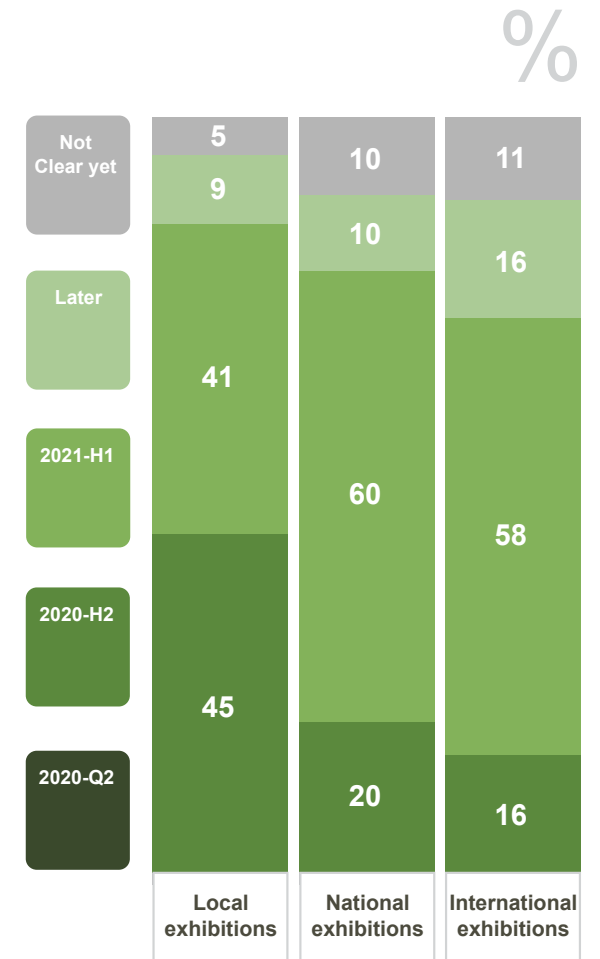
Detailed results for South Africa



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

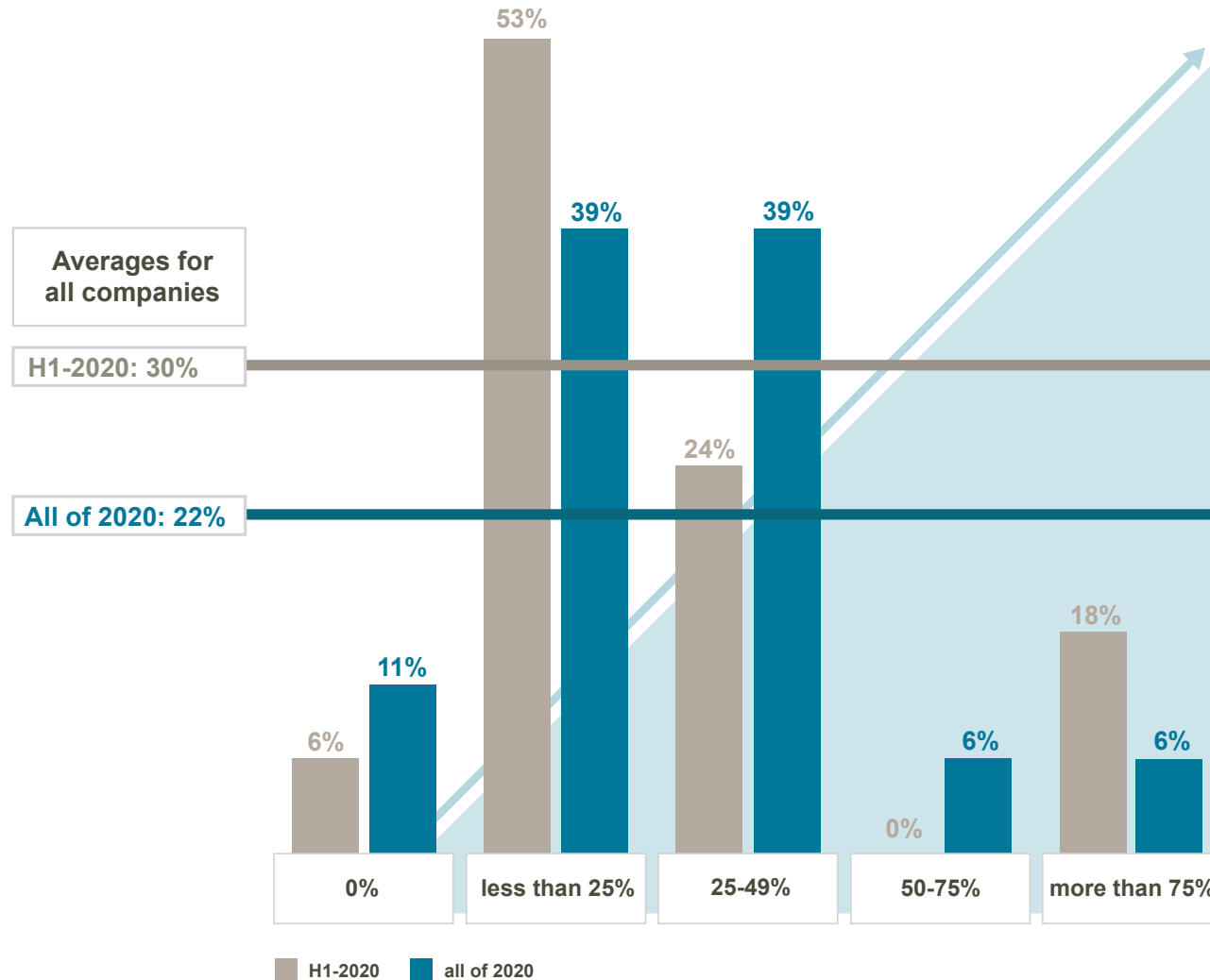


When do you believe exhibitions will open again in your city?

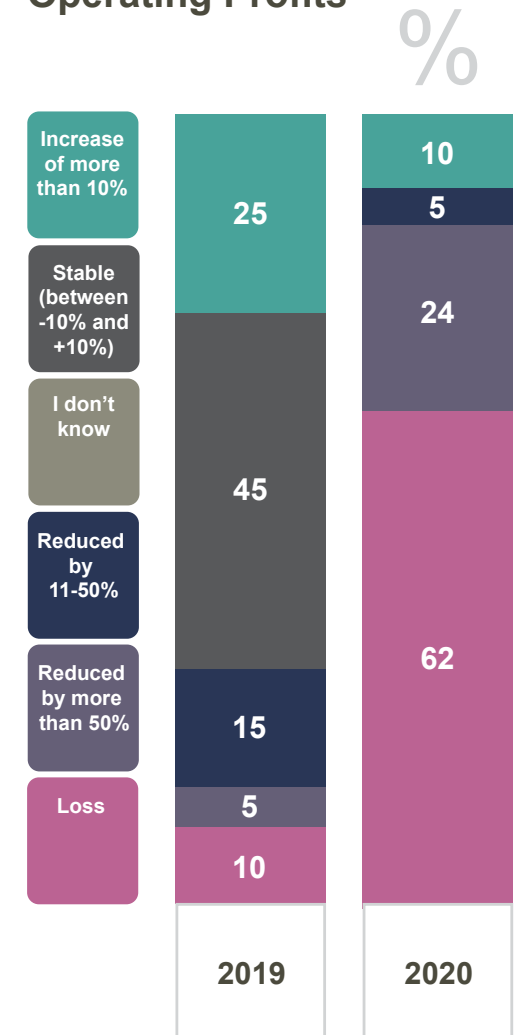




Revenue compared to last year (2019)

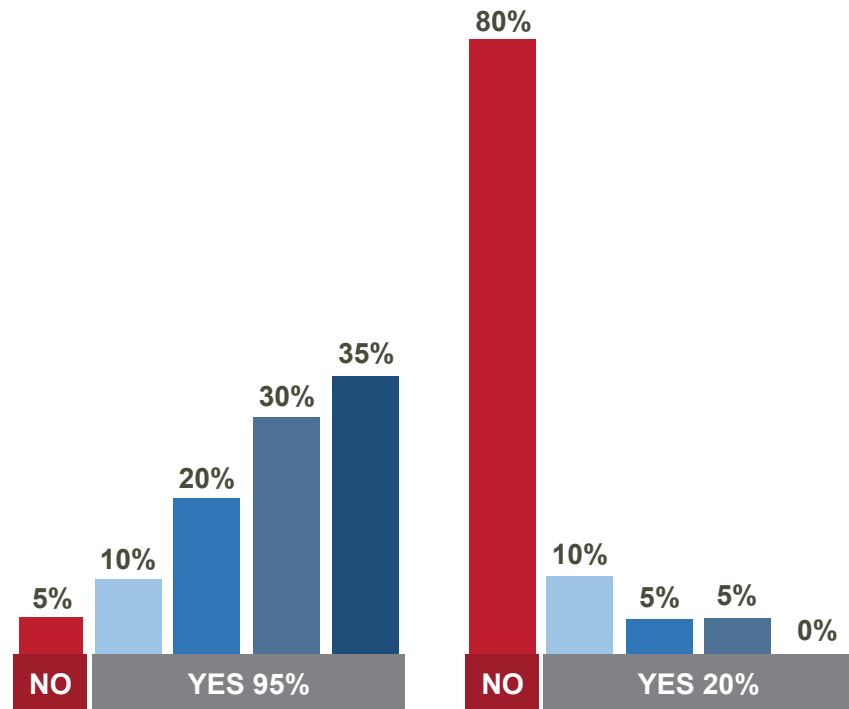


Operating Profits



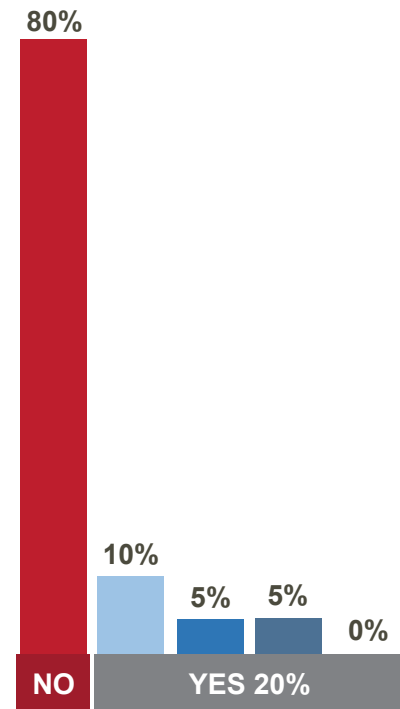


Did your company implement cost reductions?

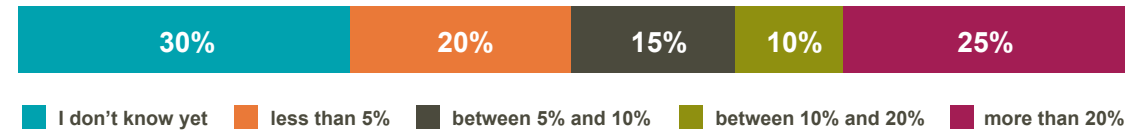


- No
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- Yes, for between 25% and 50% of our 2019 overall costs
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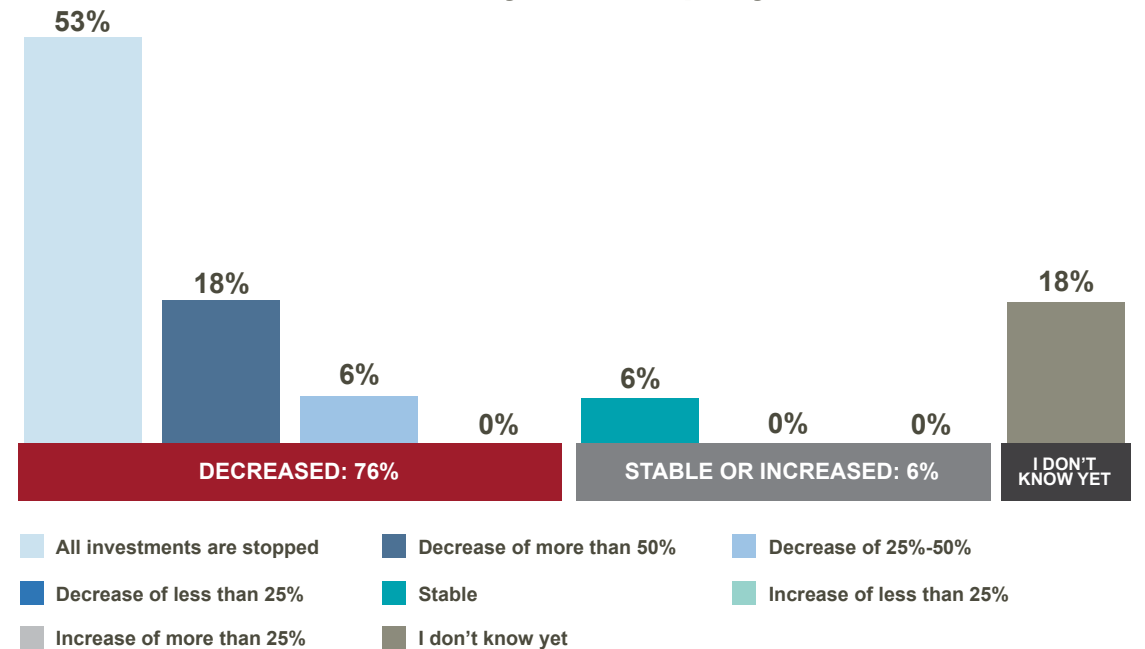
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





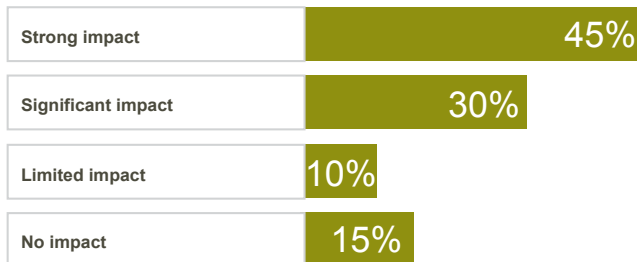
Digitalisation

How would you rate the transition of the exhibition industry?

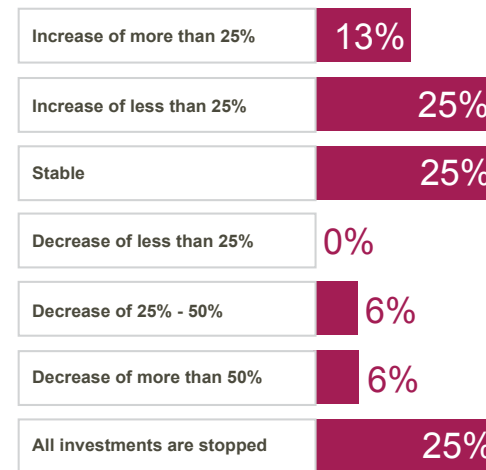
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





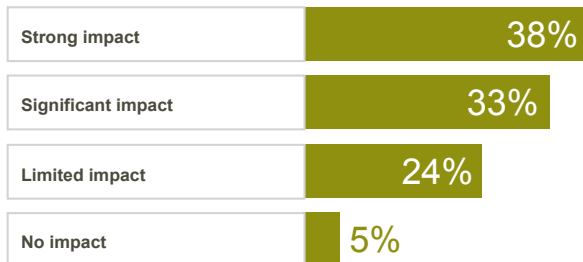
Diversity

How would you rate the transition of the exhibition industry?

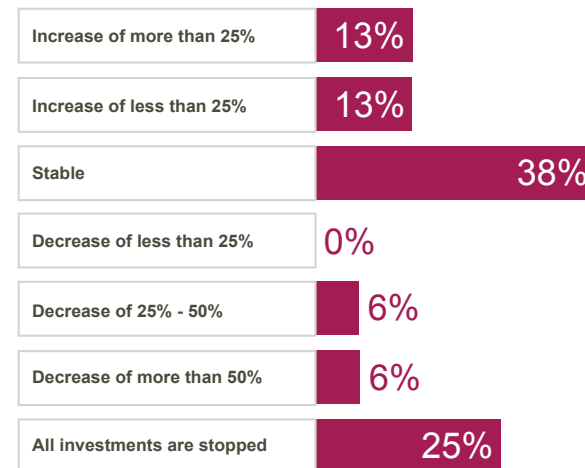
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



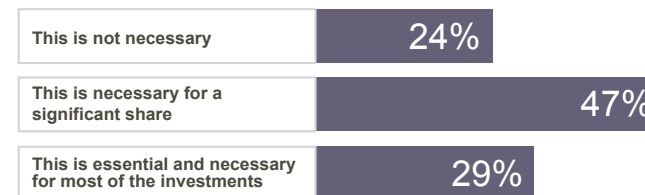
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





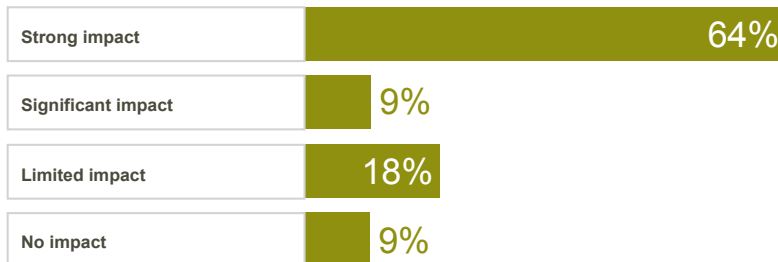
Sustainability

How would you rate the transition of the exhibition industry?

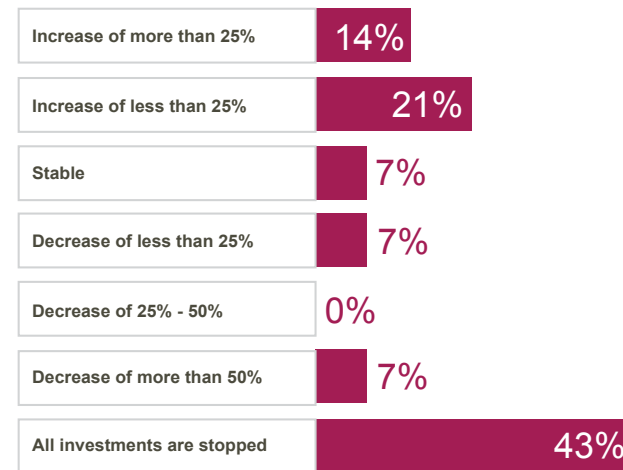
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



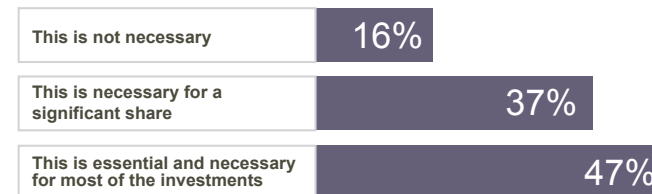
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

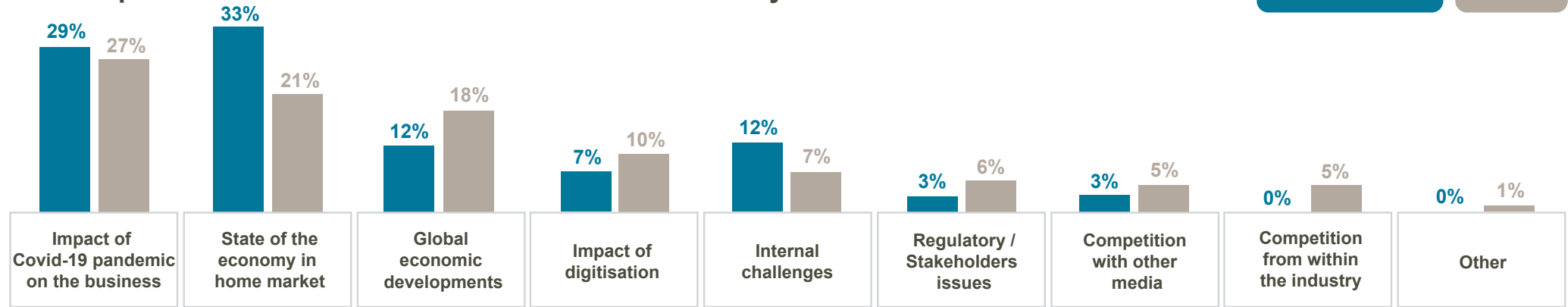


Detailed results for South Africa



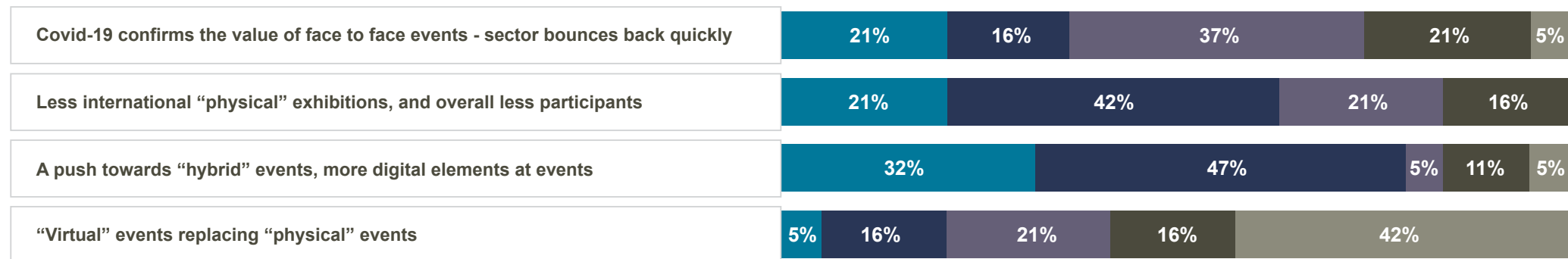
Most important business issues in the exhibition industry

South Africa Global



Format of exhibitions in the coming years

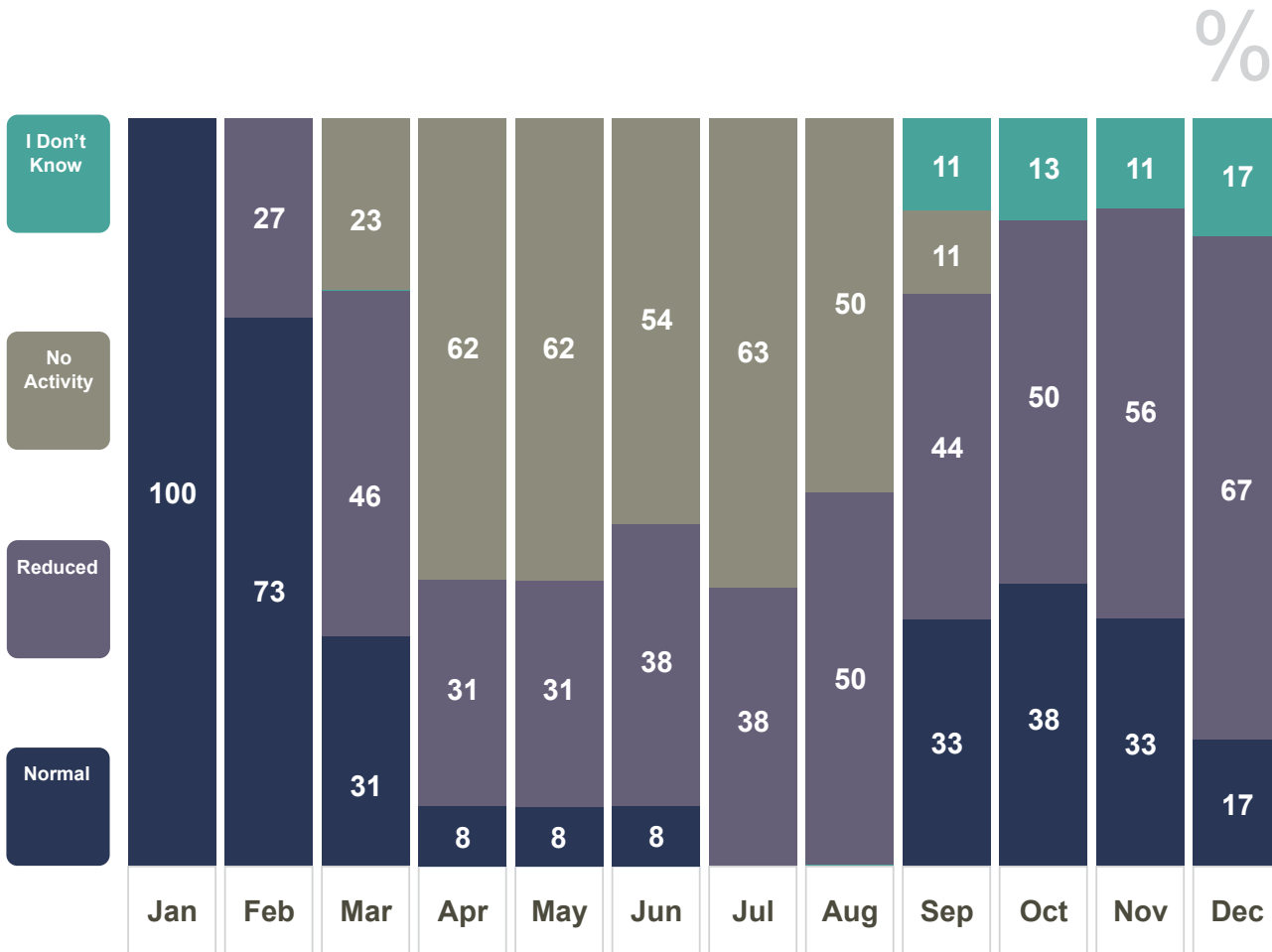
Yes, for sure Most probably Not sure Not sure at all Definitely not



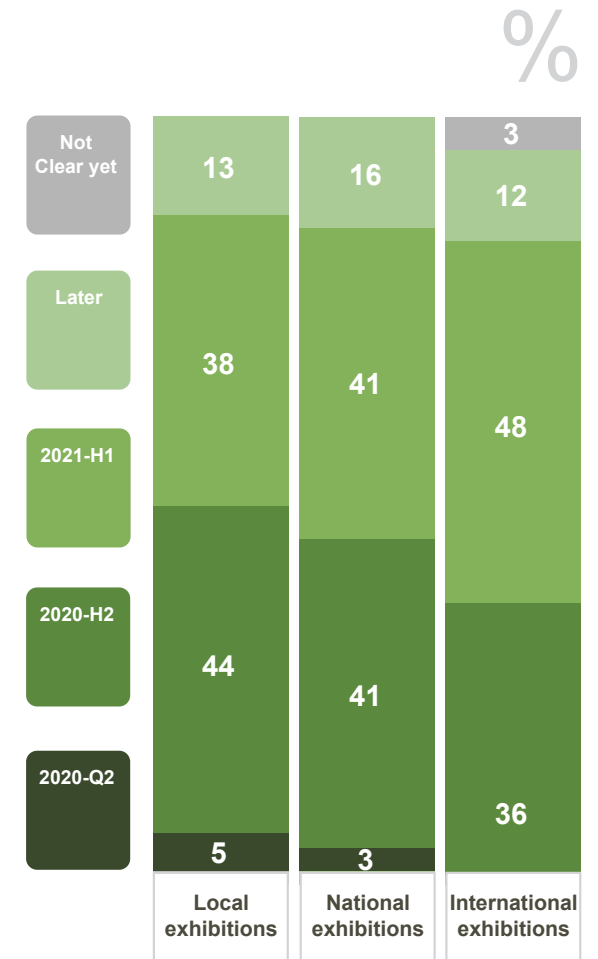
Detailed results for United Arab Emirates



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

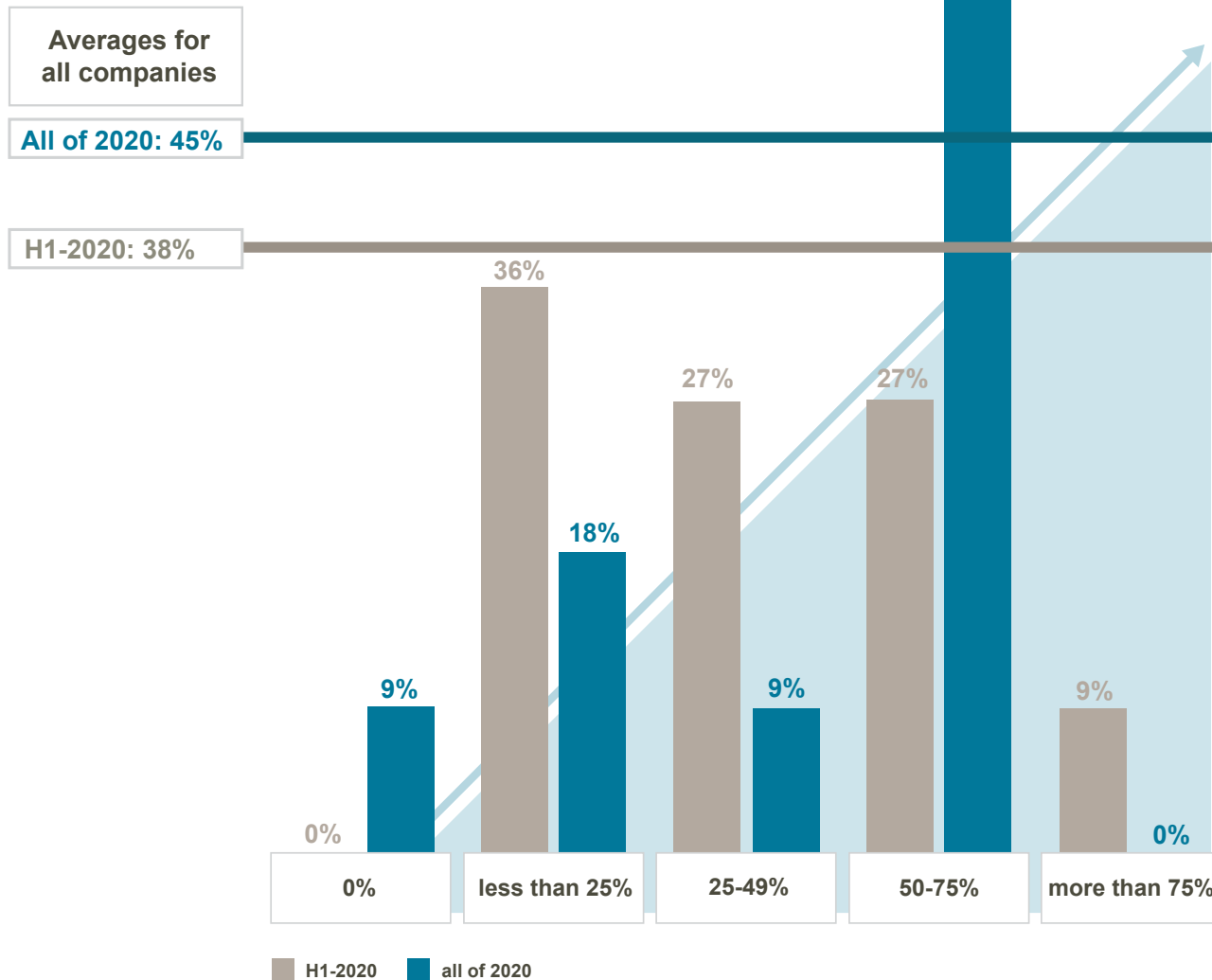


When do you believe exhibitions will open again in your city?

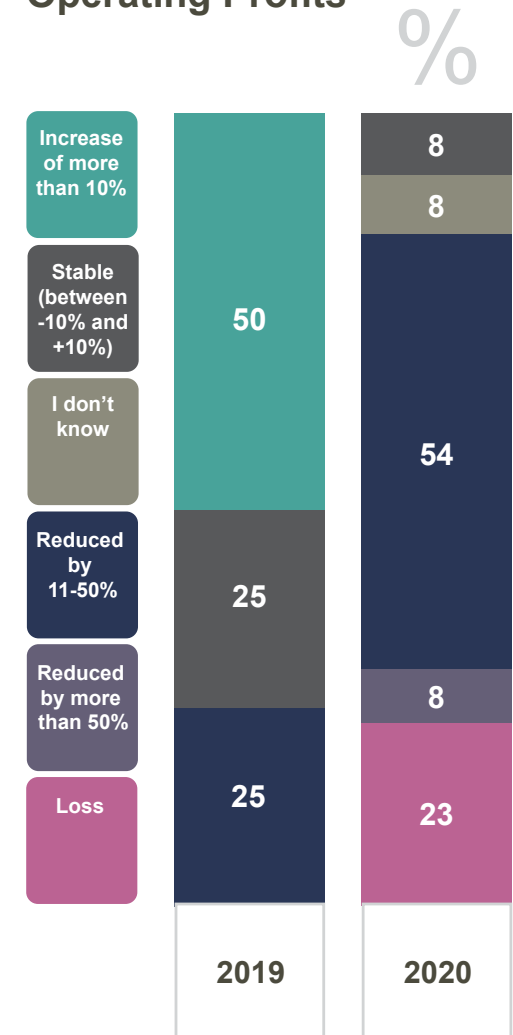




Revenue compared to last year (2019)

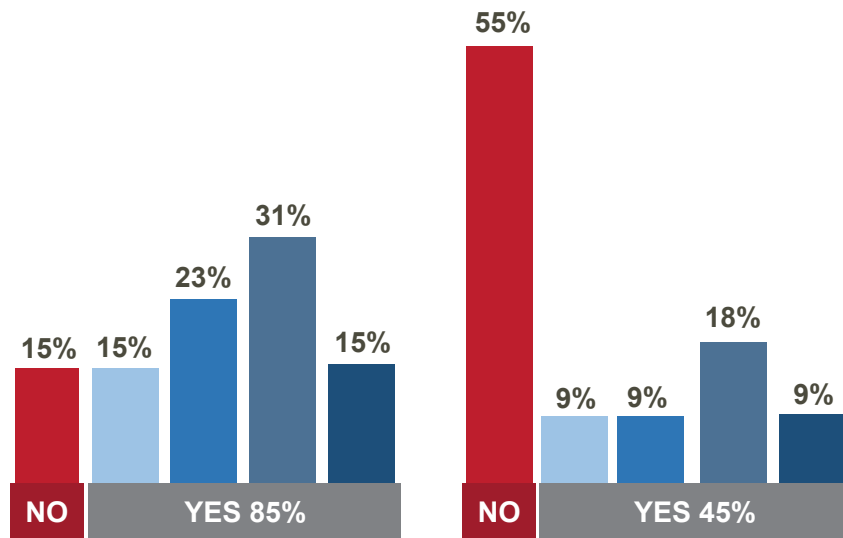


Operating Profits



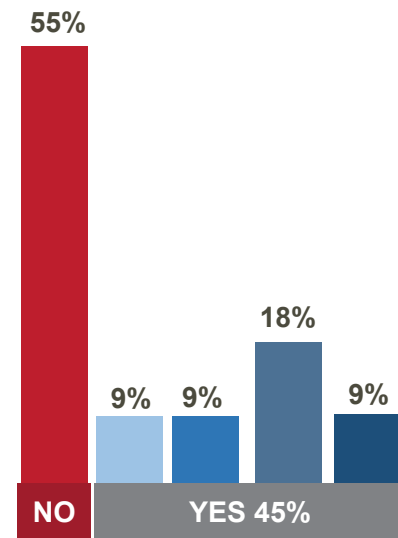


Did your company implement cost reductions?

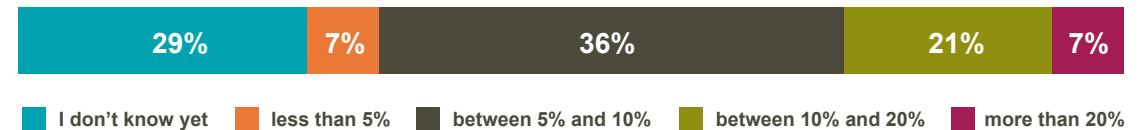


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

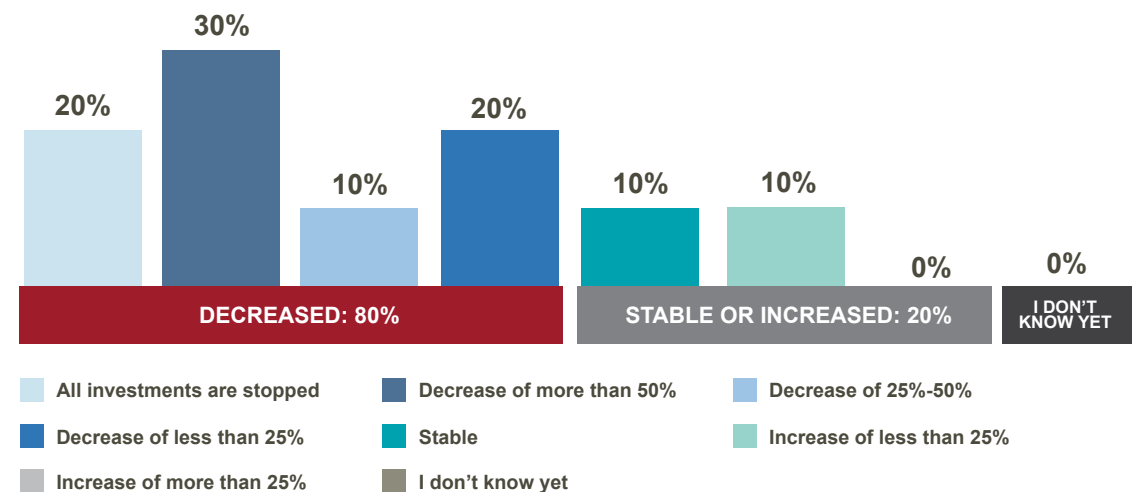
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





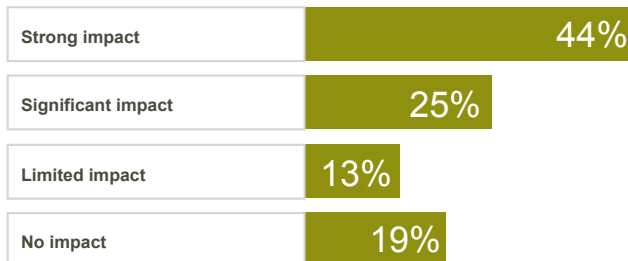
Digitalisation

How would you rate the transition of the exhibition industry?

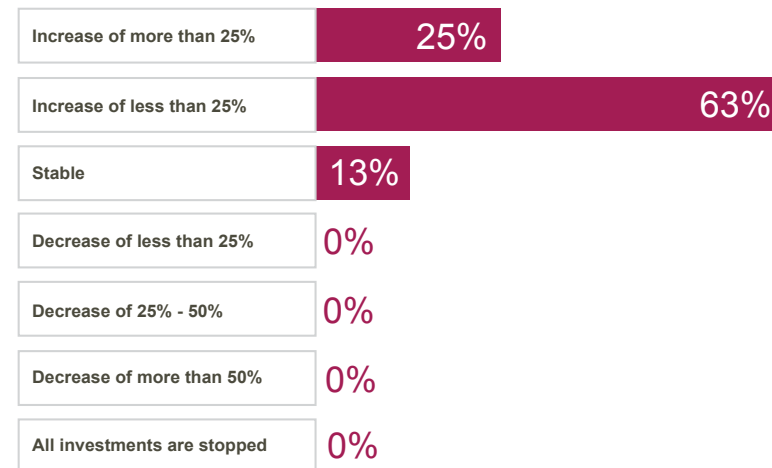
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



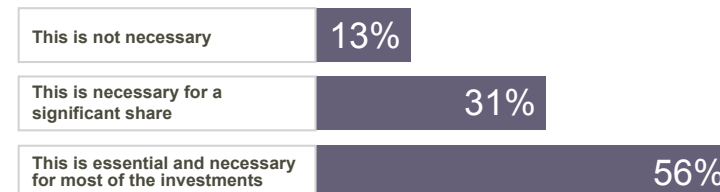
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





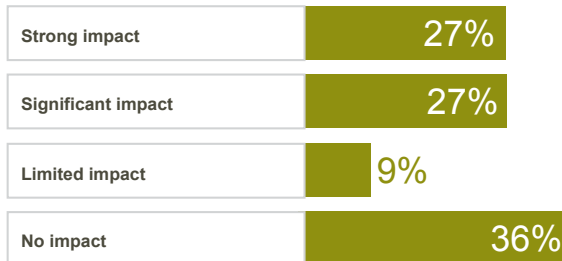
Diversity

How would you rate the transition of the exhibition industry?

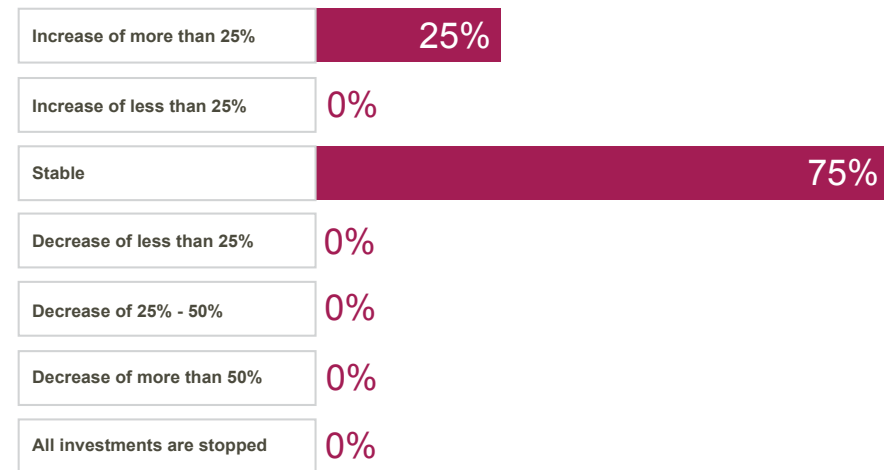
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





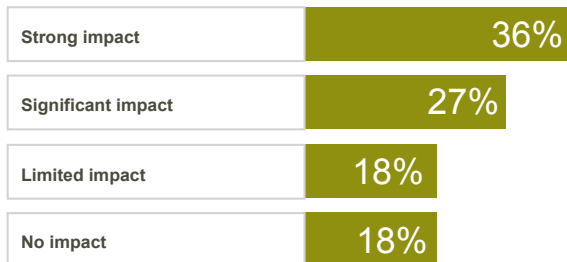
Sustainability

How would you rate the transition of the exhibition industry?

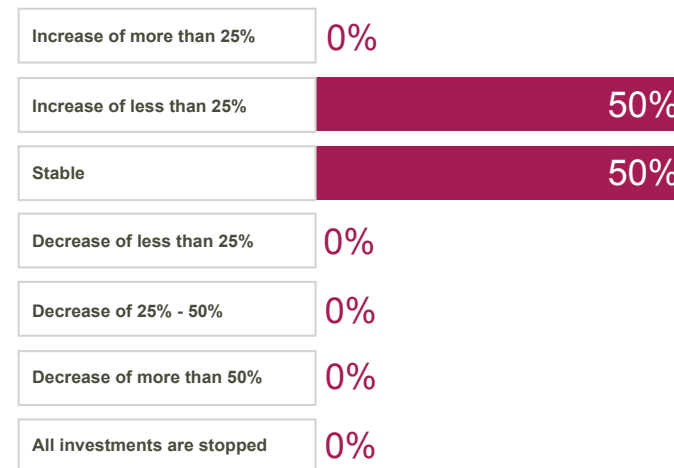
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



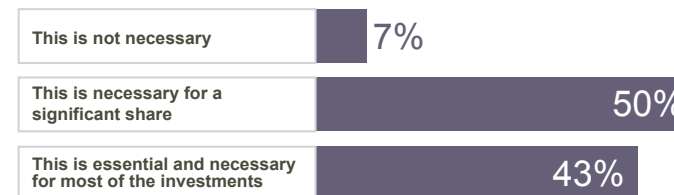
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

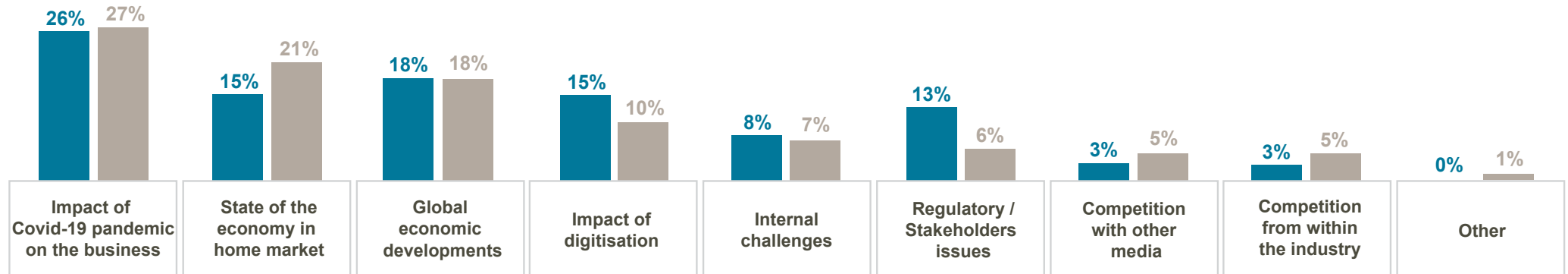


Detailed results for United Arab Emirates



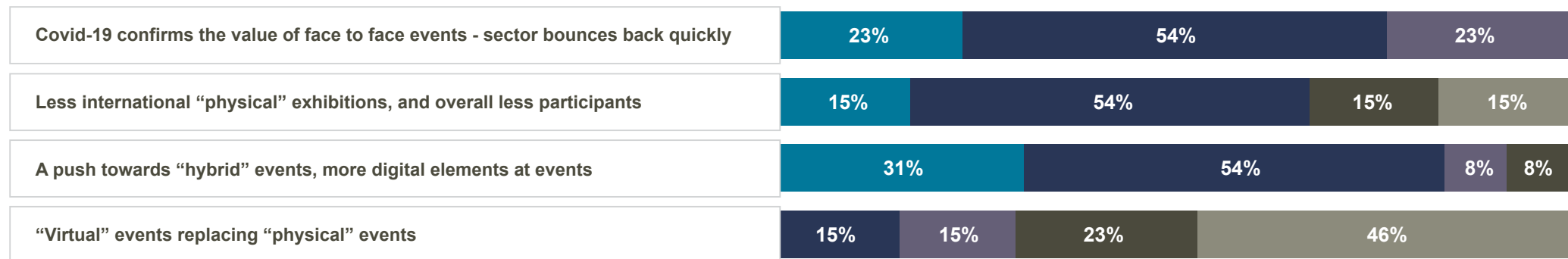
Most important business issues in the exhibition industry

UAE Global



Format of exhibitions in the coming years

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

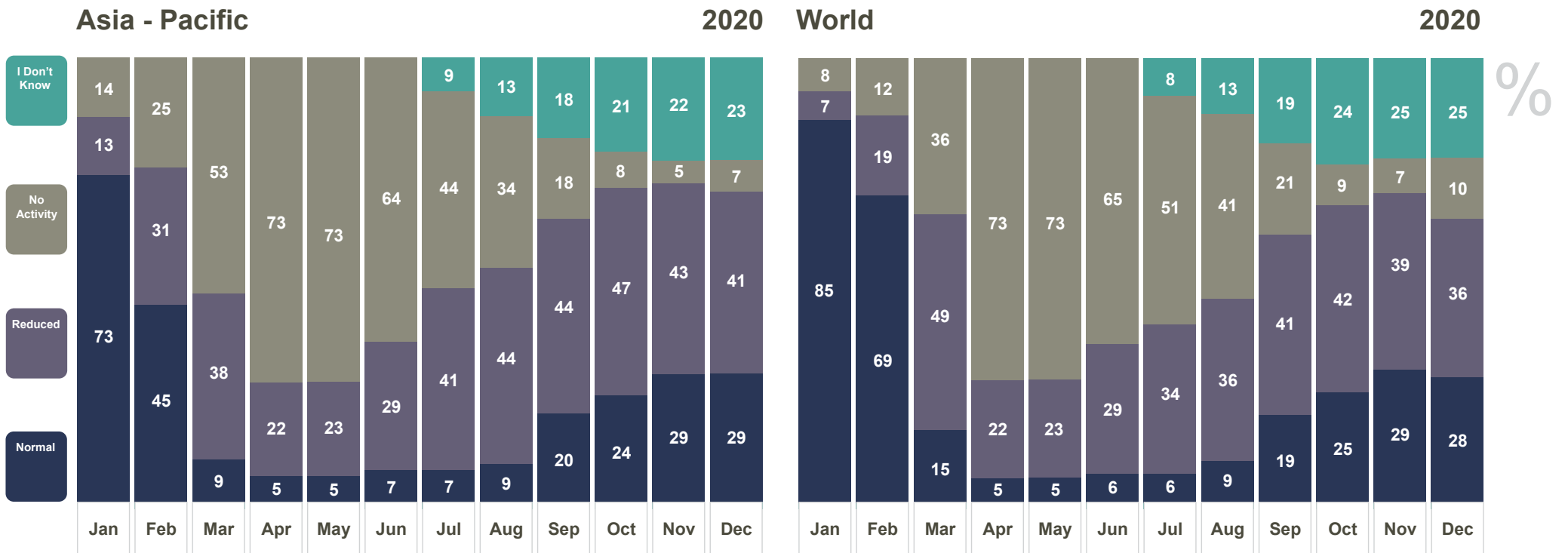


A network diagram consisting of numerous purple, reflective spheres (nodes) connected by thin, light purple lines. The nodes are arranged in a roughly triangular pattern, with the top row having the fewest nodes and the bottom row having the most. The background is a solid, light purple color.

Asia - Pacific

Operations in 2020 Asia - Pacific

Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020



Reopening Exhibitions Asia - Pacific



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

Not
Clear yet

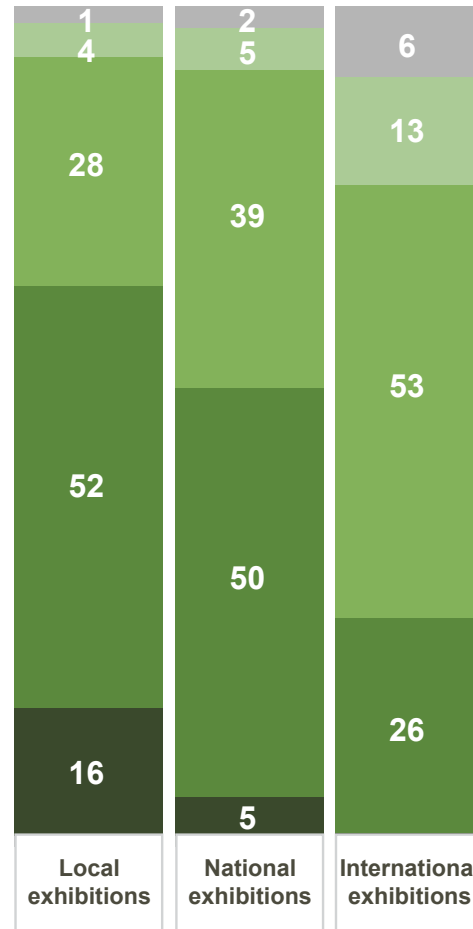
Later

2021-H1

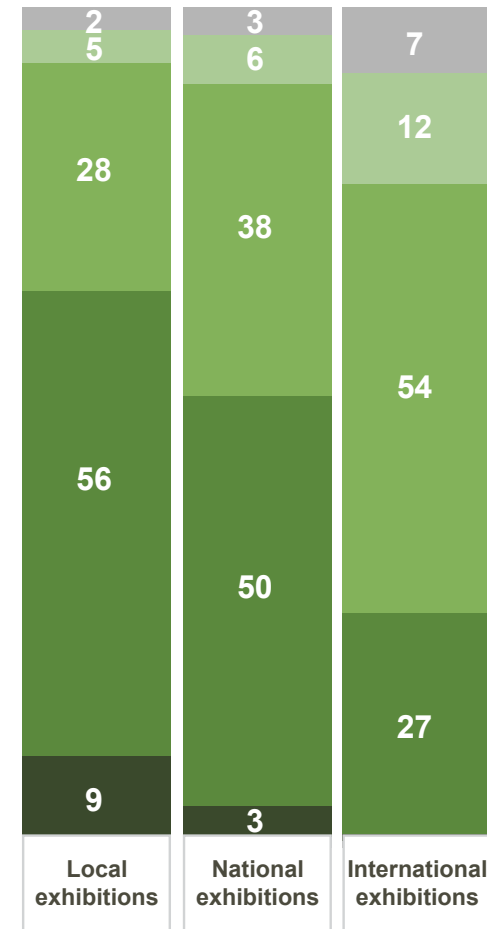
2020-H2

2020-Q2

Asia - Pacific



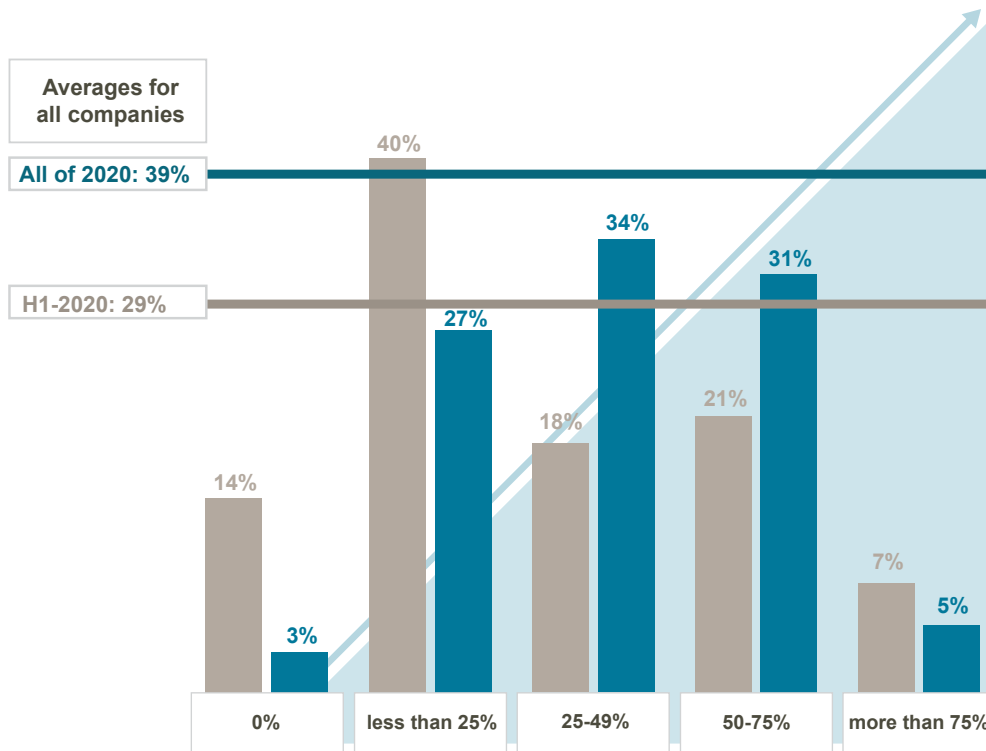
World



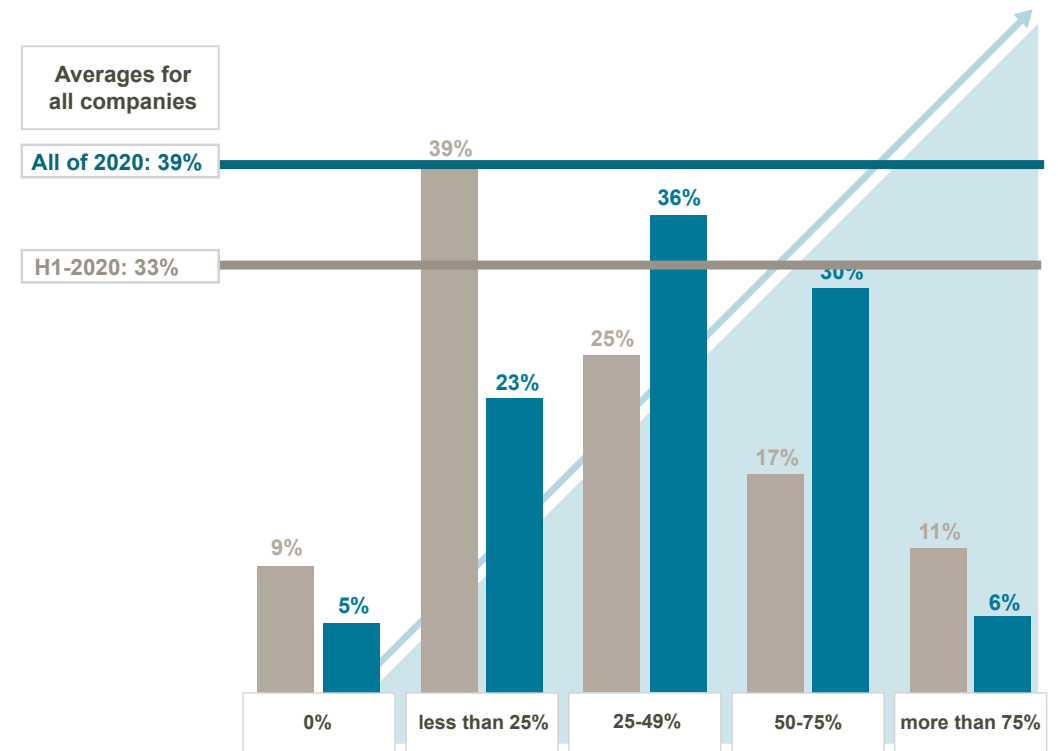
%

Revenue compared to last year (2019)

Asia - Pacific

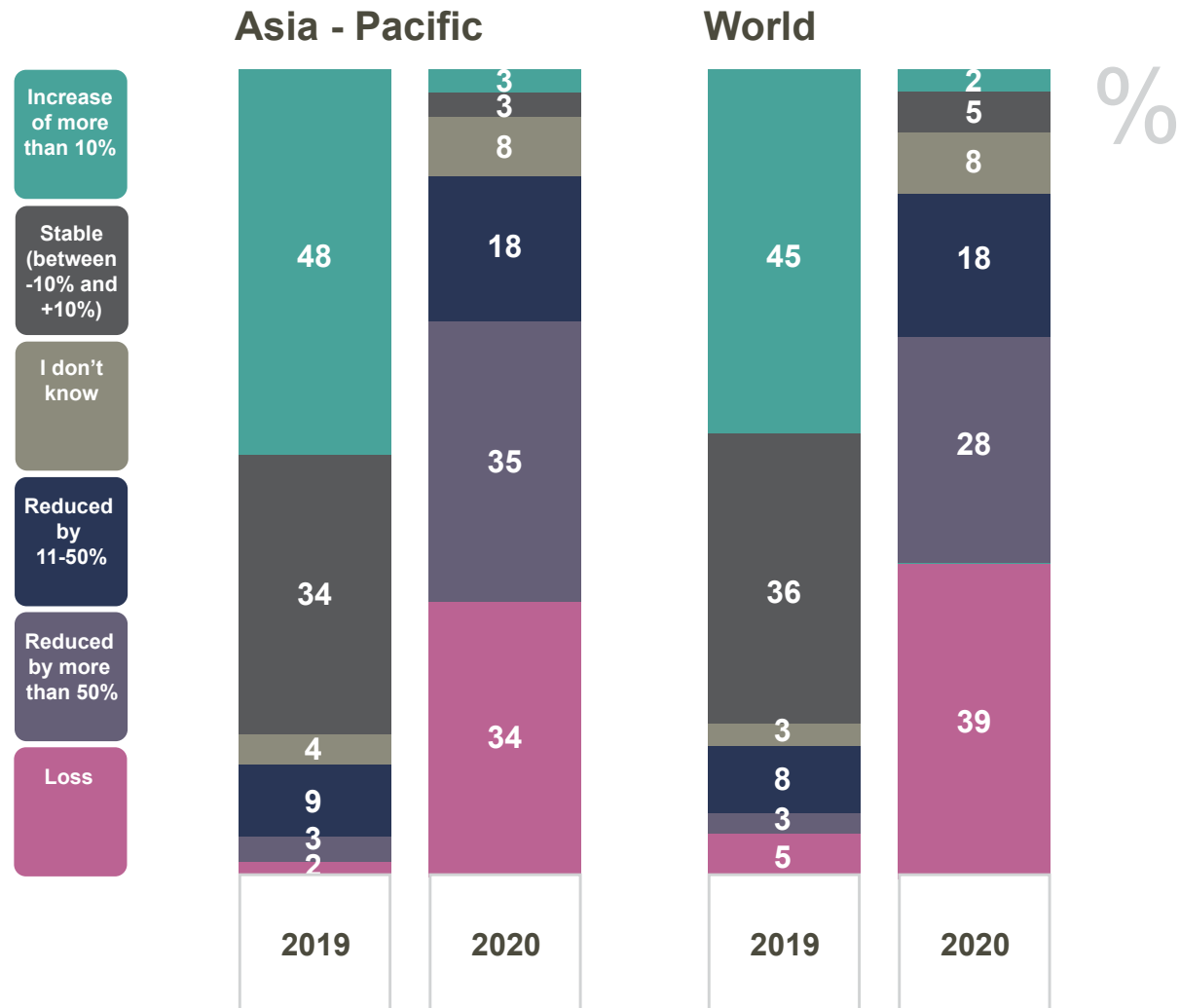


World



■ H1-2020 ■ all of 2020

Operating profits Asia - Pacific



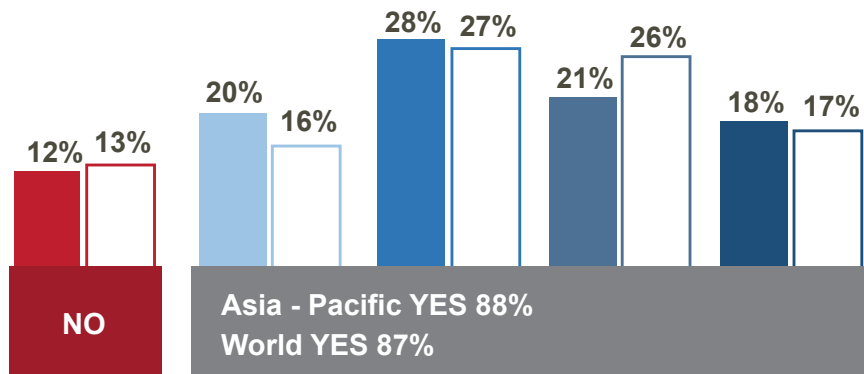
Cost Reductions - Public Financial Support Asia - Pacific



Did your company implement cost reductions?

Asia - Pacific

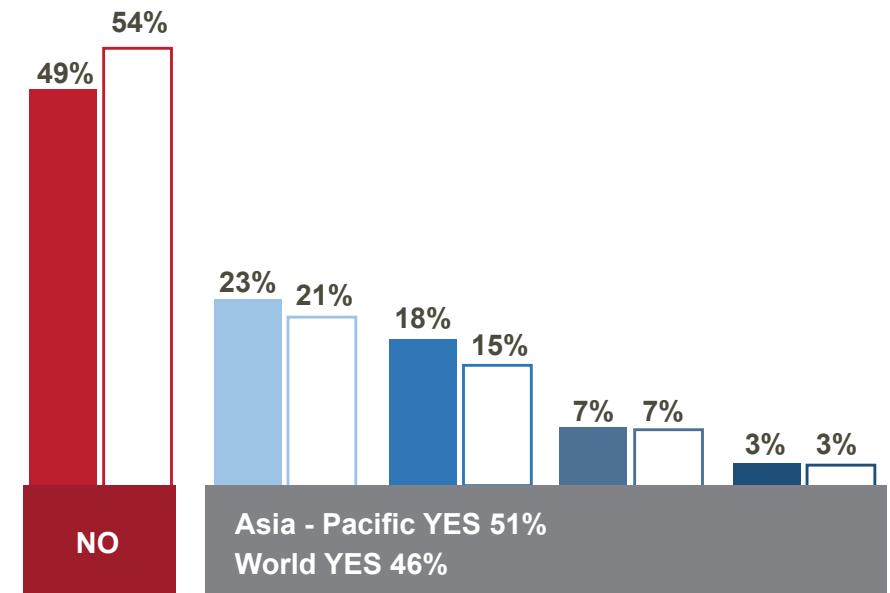
World



Did your company benefit from public financial support?

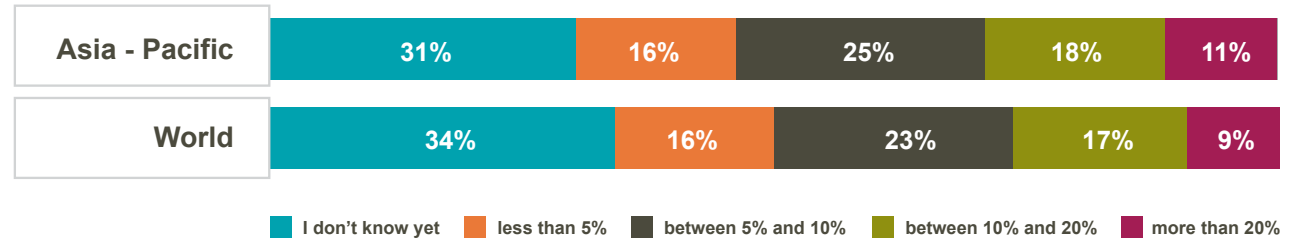
Asia - Pacific

World



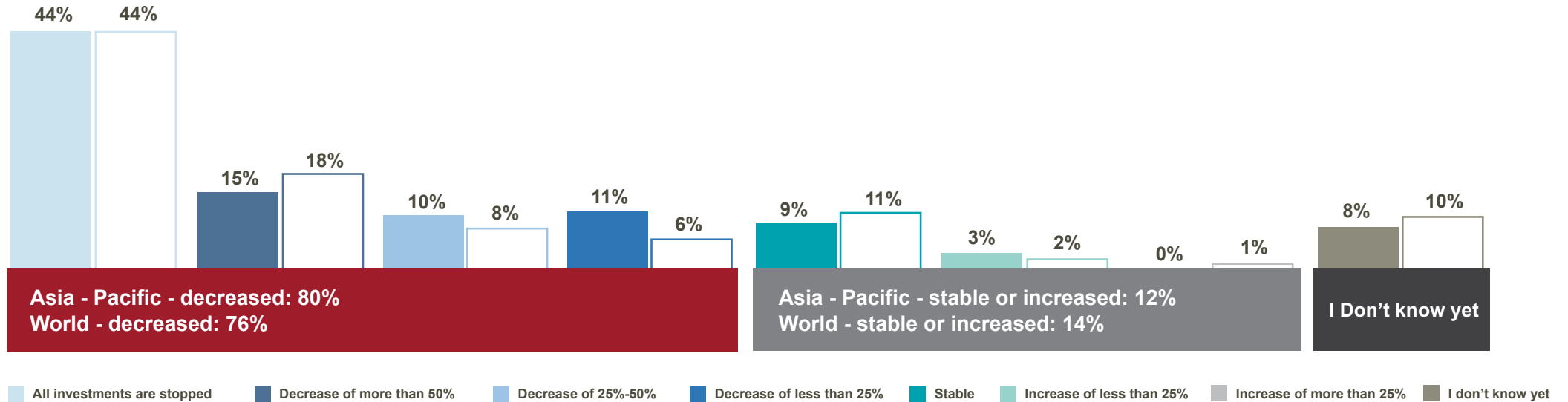
■ No
 ■ Yes, for less than 10% of our 2019 overall costs
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Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?

Asia - Pacific World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Asia - Pacific

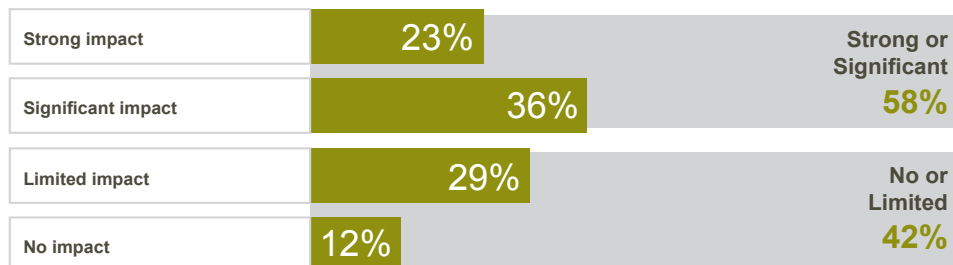


World

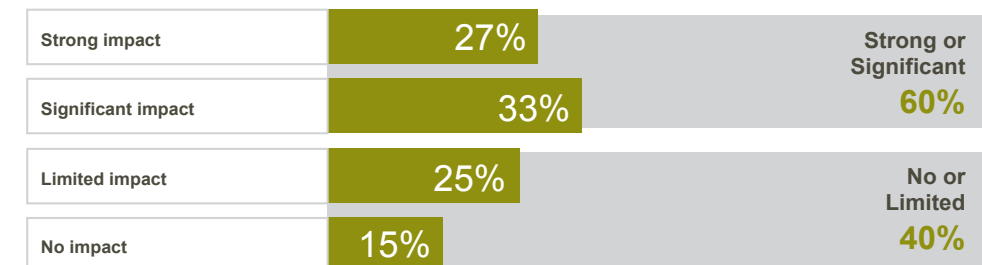


To what extent has Covid-19 impacted your company activities in digitalisation?

Asia - Pacific



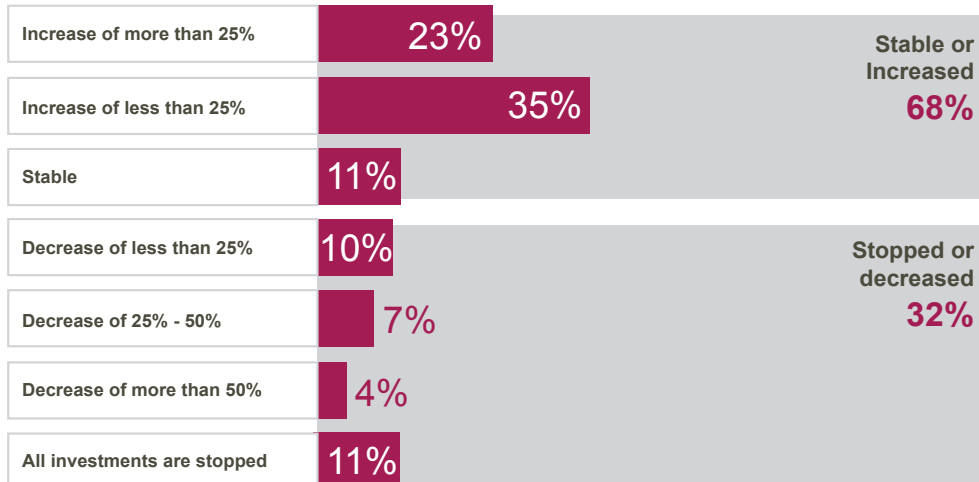
World



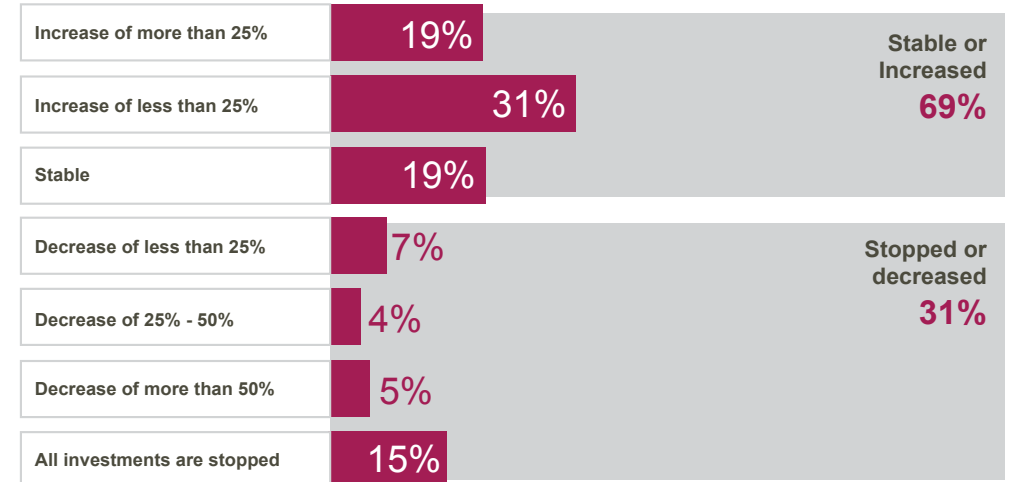


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?

Asia - Pacific

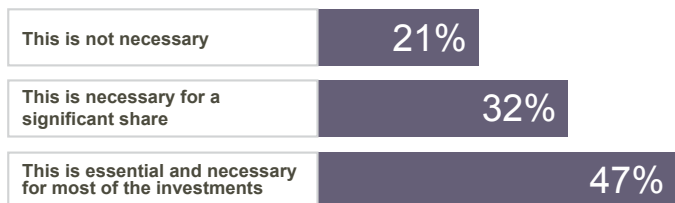


World

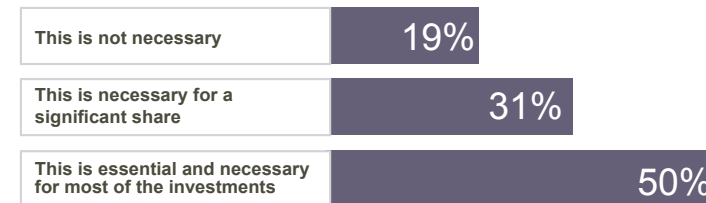


To what degree would you welcome some public investments in digitalisation?

Asia - Pacific



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Asia - Pacific

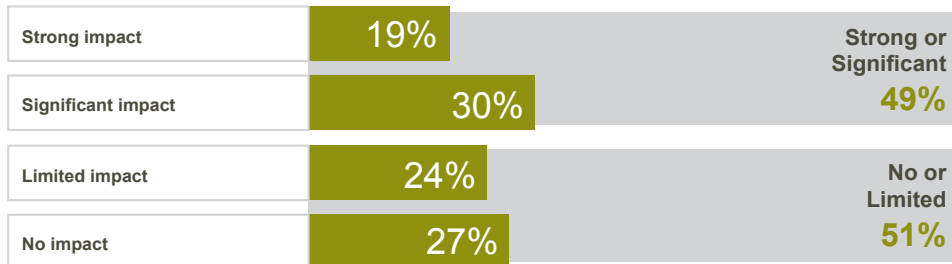


World

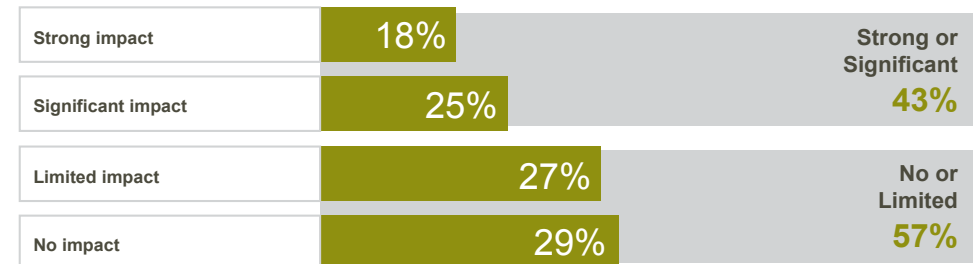


To what extent has Covid-19 impacted your company activities in diversity?

Asia - Pacific



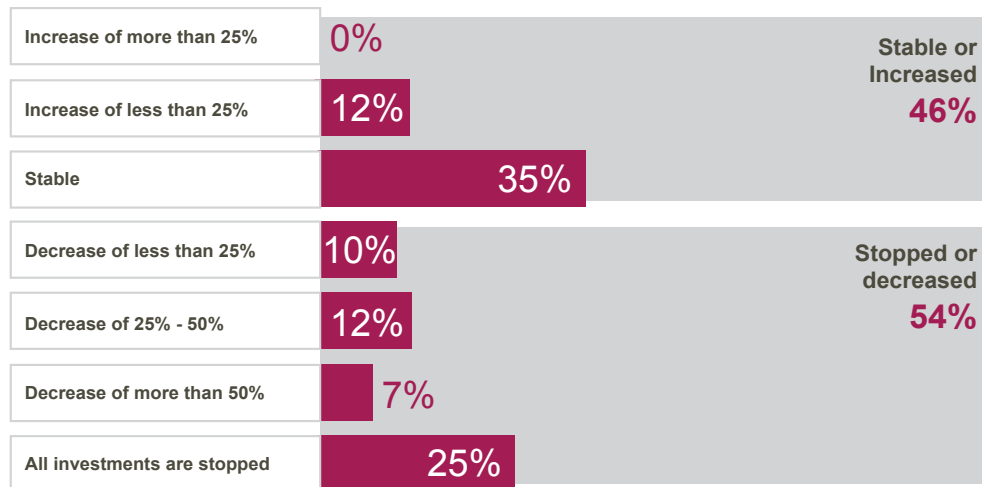
World



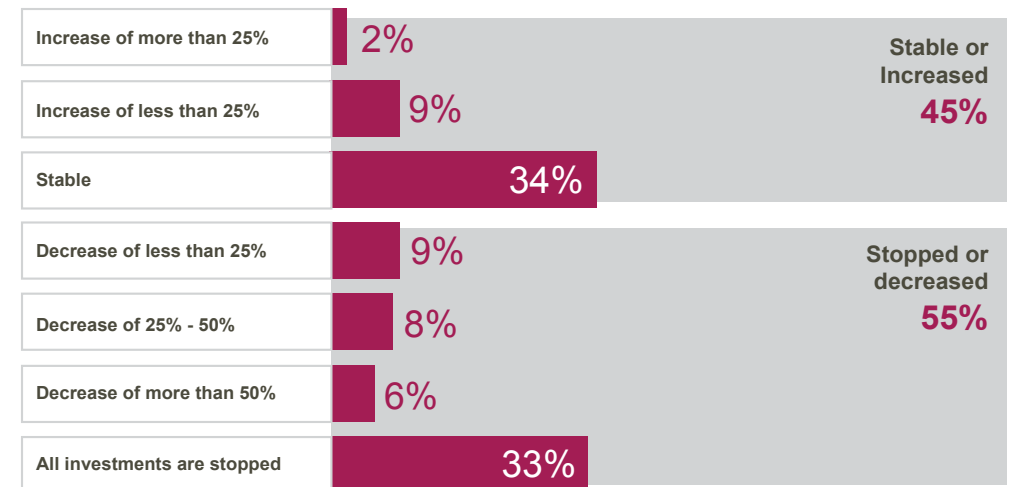


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?

Asia - Pacific

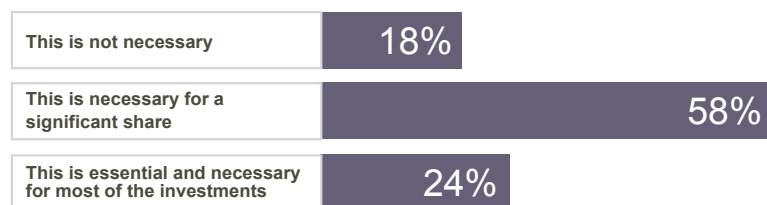


World

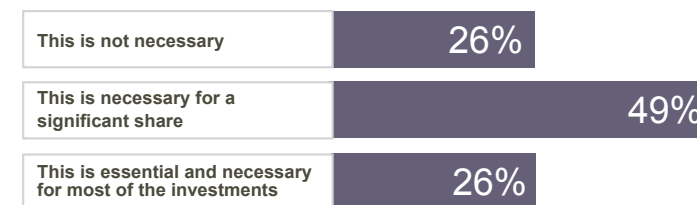


To what degree would you welcome some public investments in diversity?

Asia - Pacific



World





How would you rate the transition of the exhibition industry?

(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')

Asia - Pacific

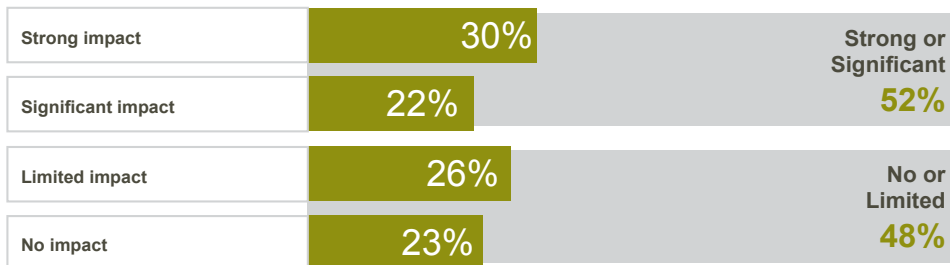


World

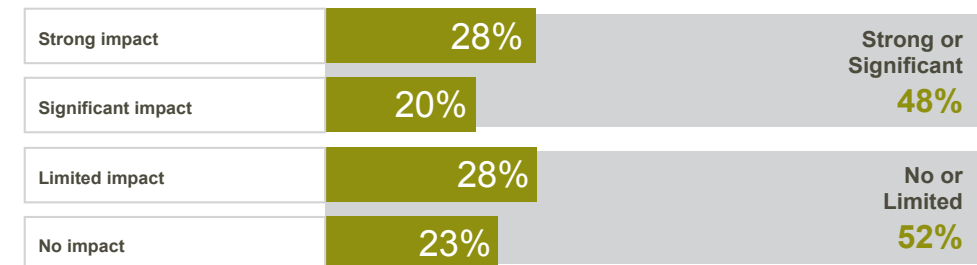


To what extent has Covid-19 impacted your company activities in sustainability?

Asia - Pacific



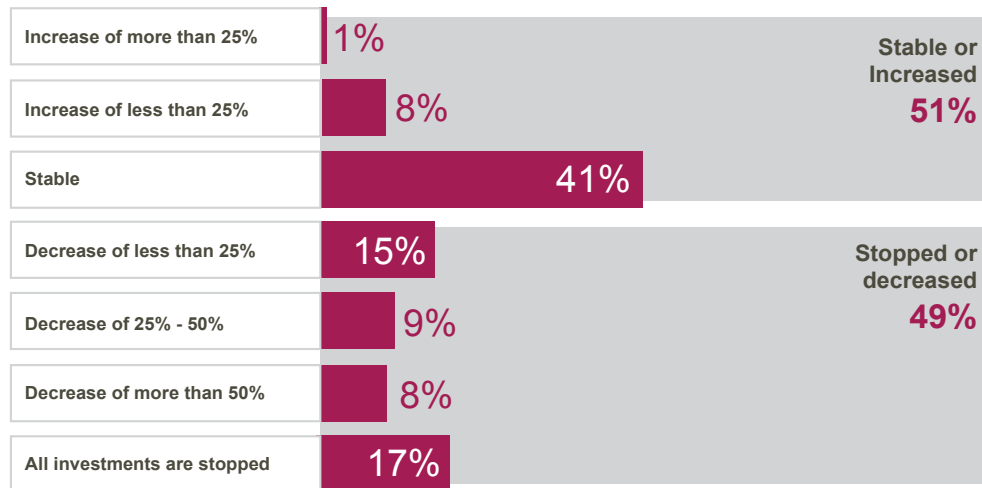
World



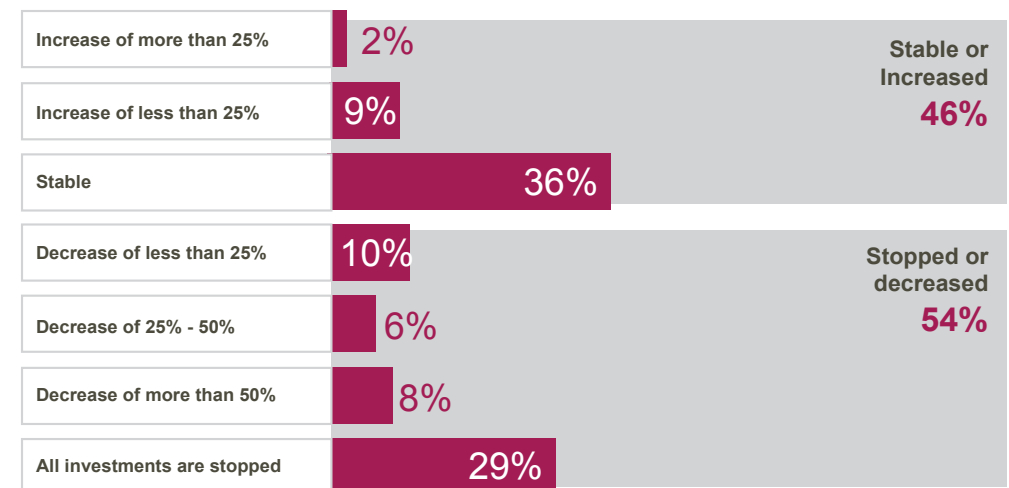


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?

Asia - Pacific

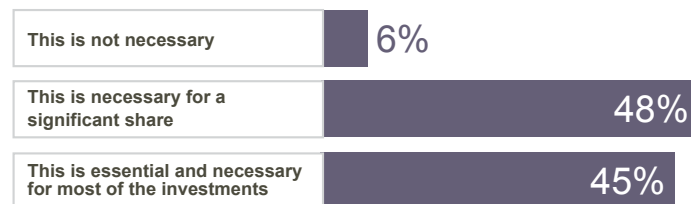


World

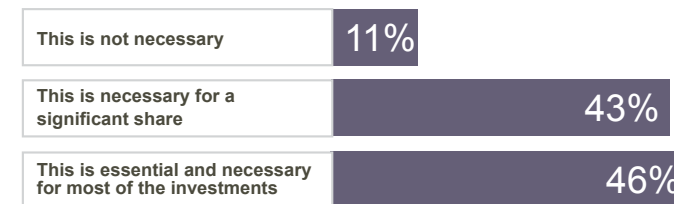


To what degree would you welcome some public investments in sustainability?

Asia - Pacific



World

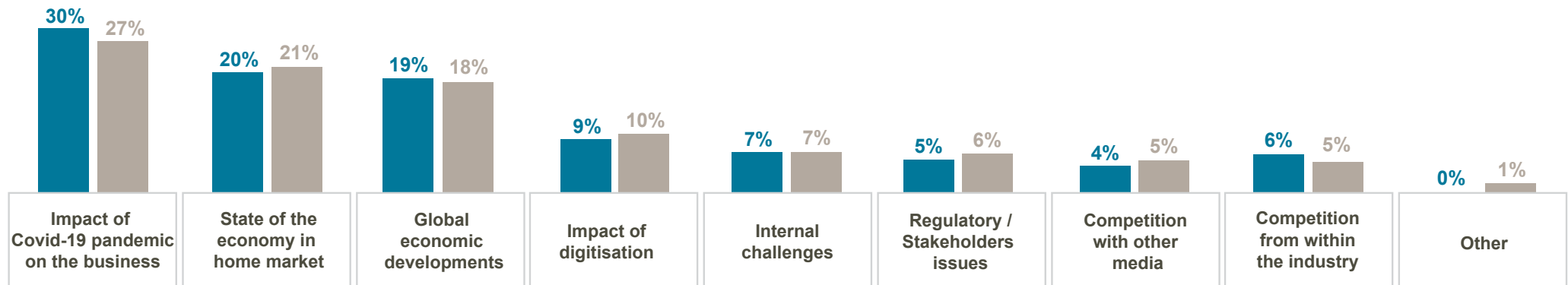


Most Important Business Issues - Format of Exhibitions - Asia - Pacific



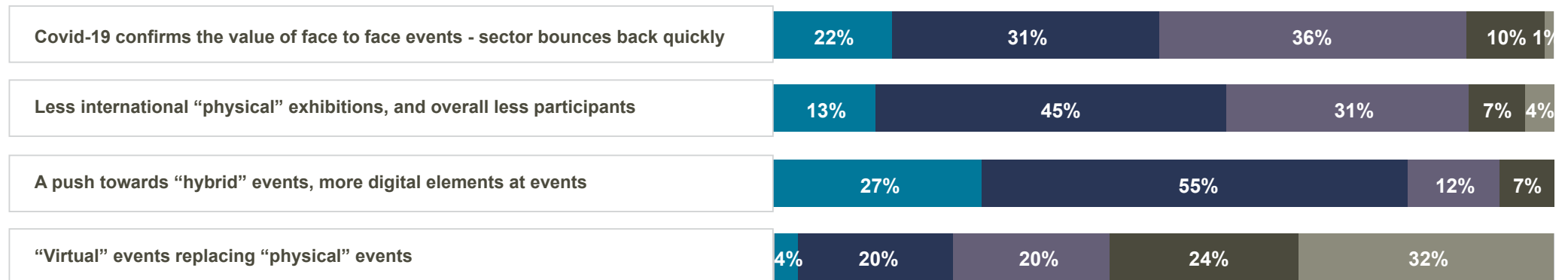
Most important business issues in the exhibition industry

Asia - Pacific Global

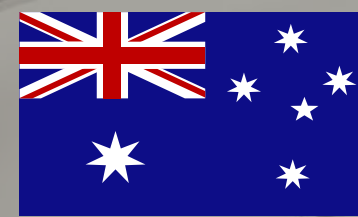


Format of exhibitions in the coming years

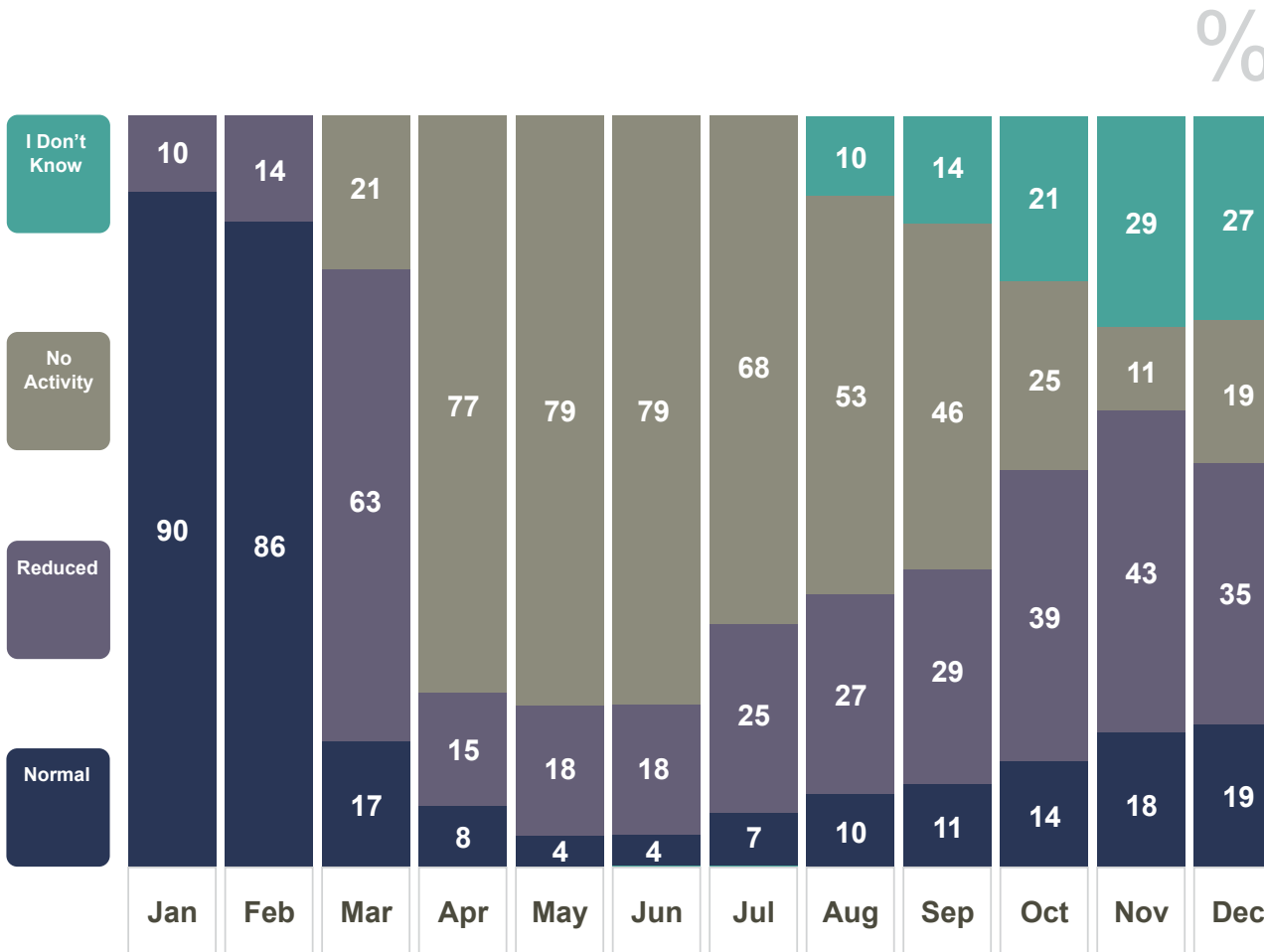
Yes, for sure Most probably Not sure Not sure at all Definitely not



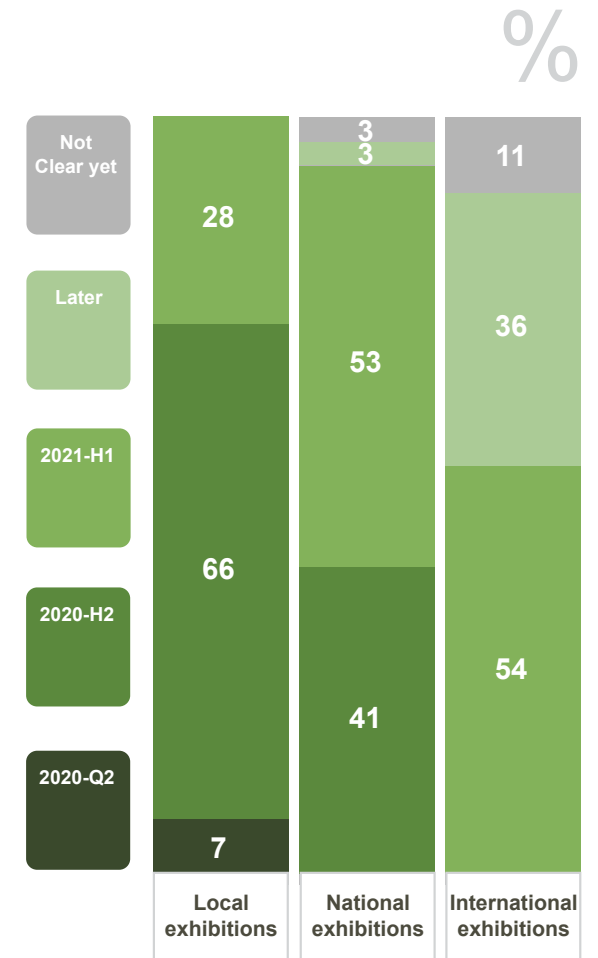
Detailed results for Australia

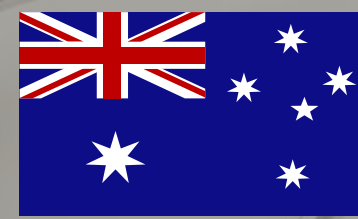


Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

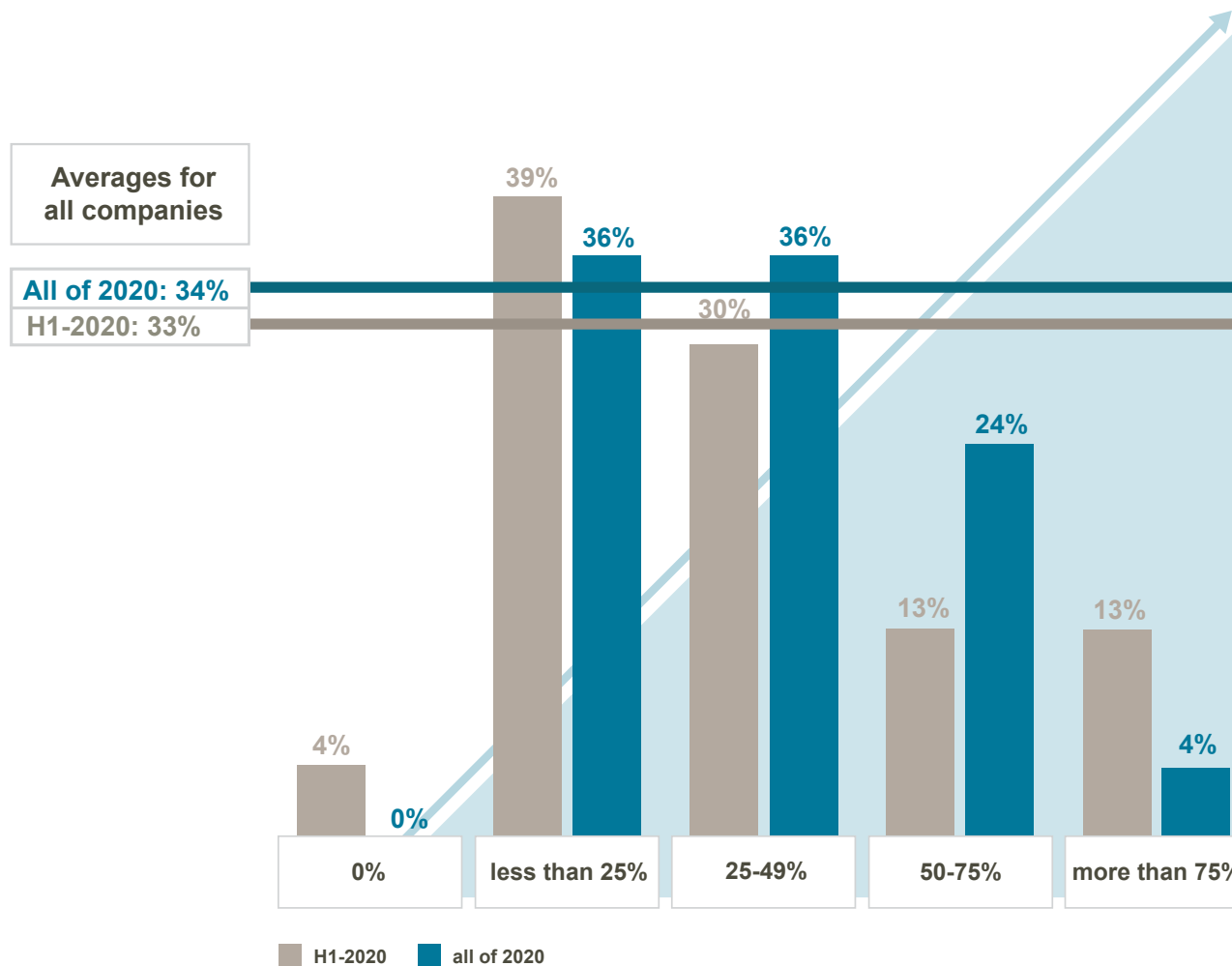


When do you believe exhibitions will open again in your city?

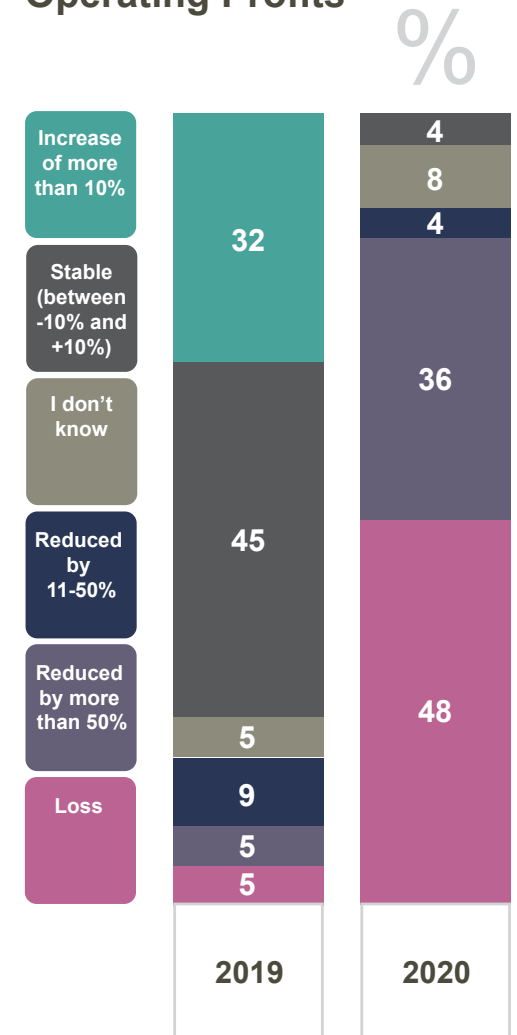


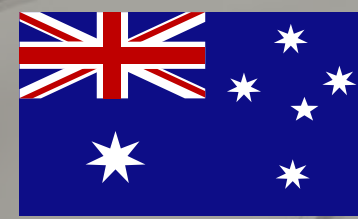


Revenue compared to last year (2019)



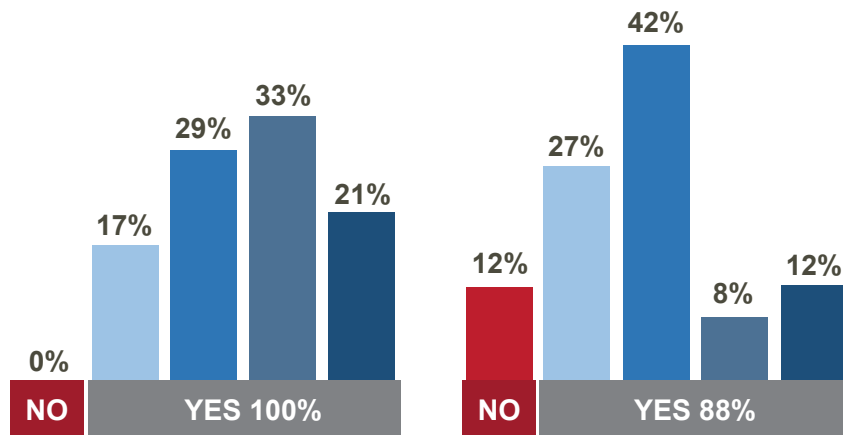
Operating Profits





Did your company implement cost reductions?

Did your company benefit from public financial support?

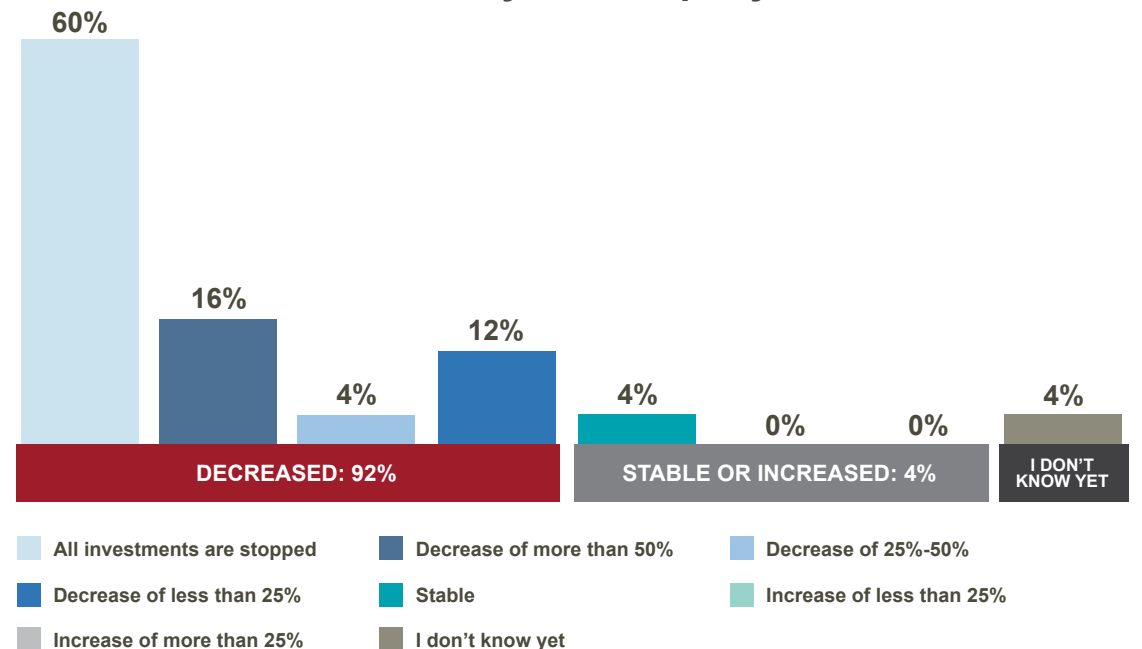


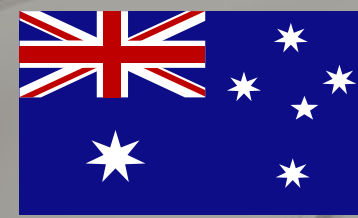
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Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





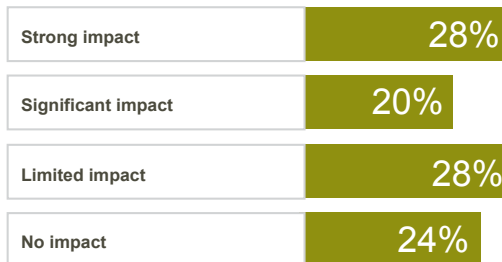
Digitalisation

How would you rate the transition of the exhibition industry?

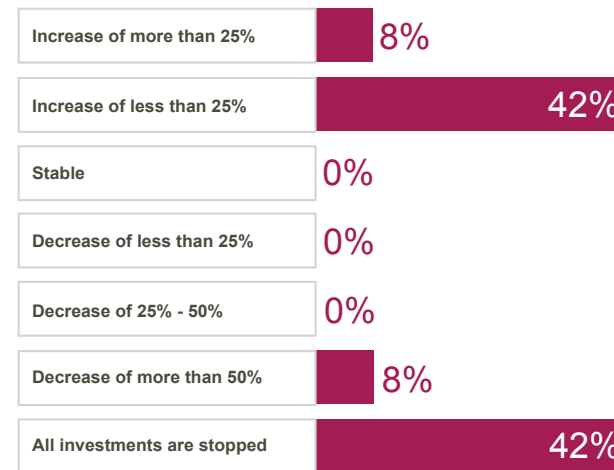
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



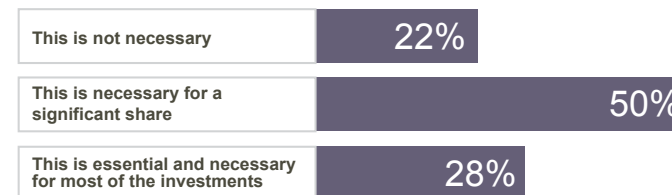
To what extent has Covid-19 impacted your company activities in digitalisation?

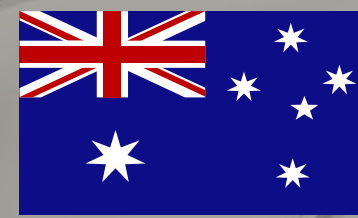


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





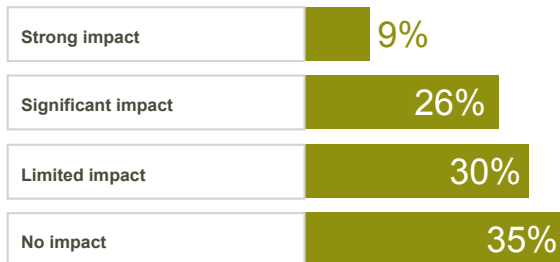
Diversity

How would you rate the transition of the exhibition industry?

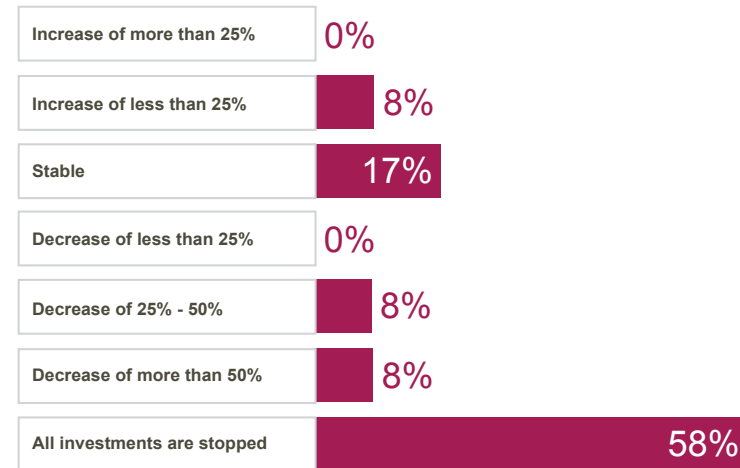
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



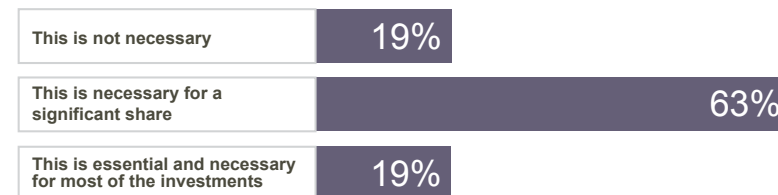
To what extent has Covid-19 impacted your company activities in diversity?

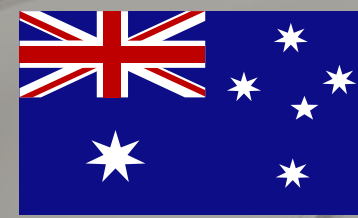


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





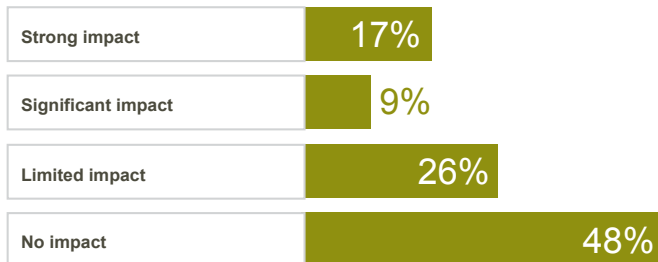
Sustainability

How would you rate the transition of the exhibition industry?

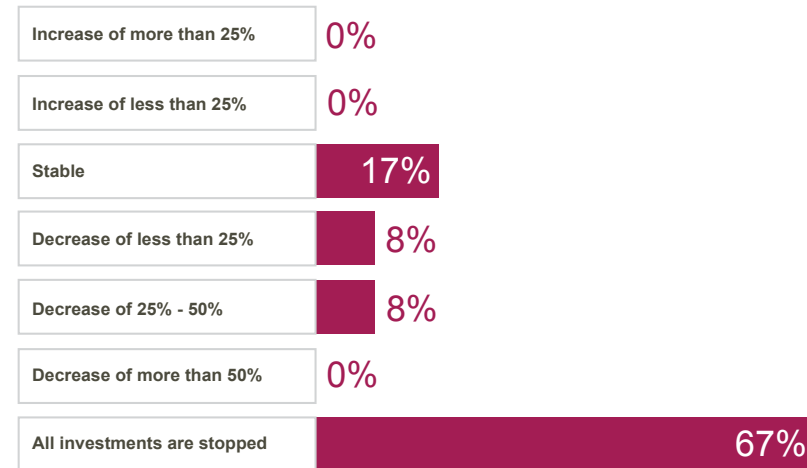
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in sustainability?

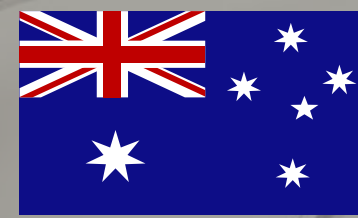


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

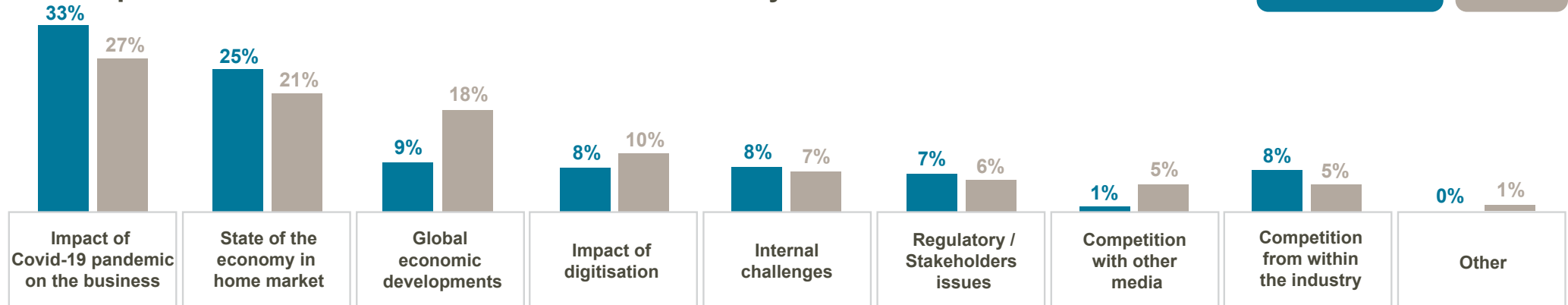




Most important business issues in the exhibition industry

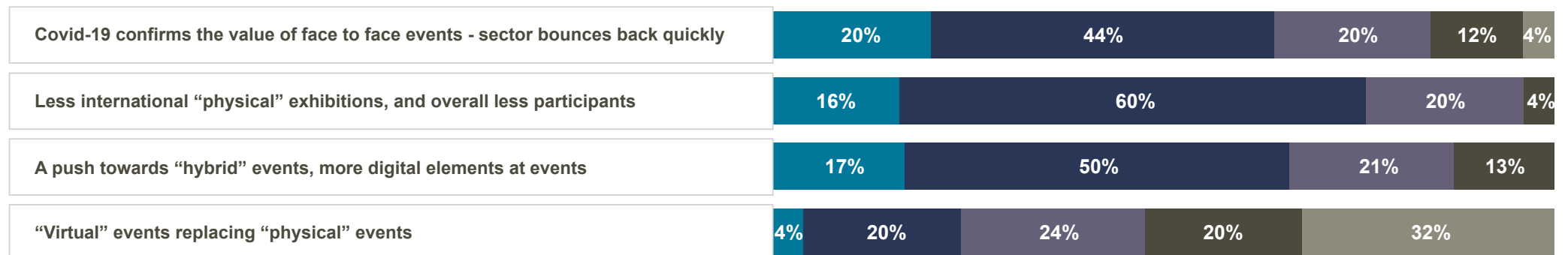
Australia

Global



Format of exhibitions in the coming years

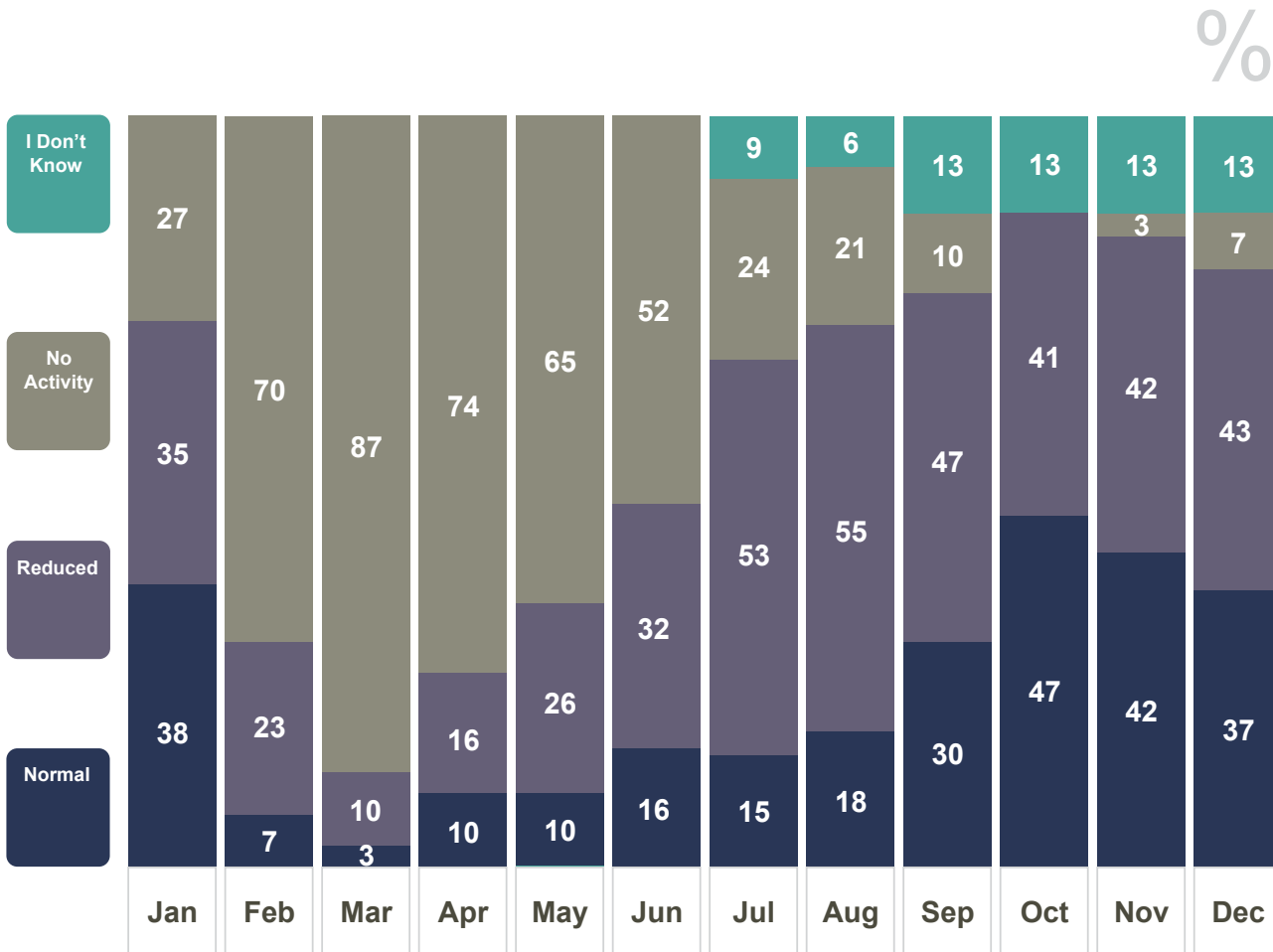
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not



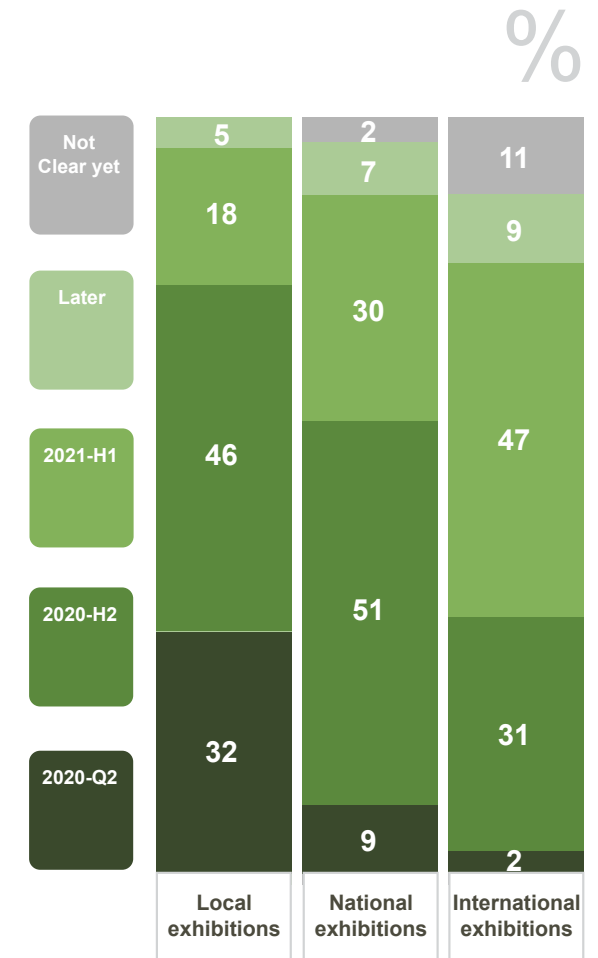
Detailed results for China



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

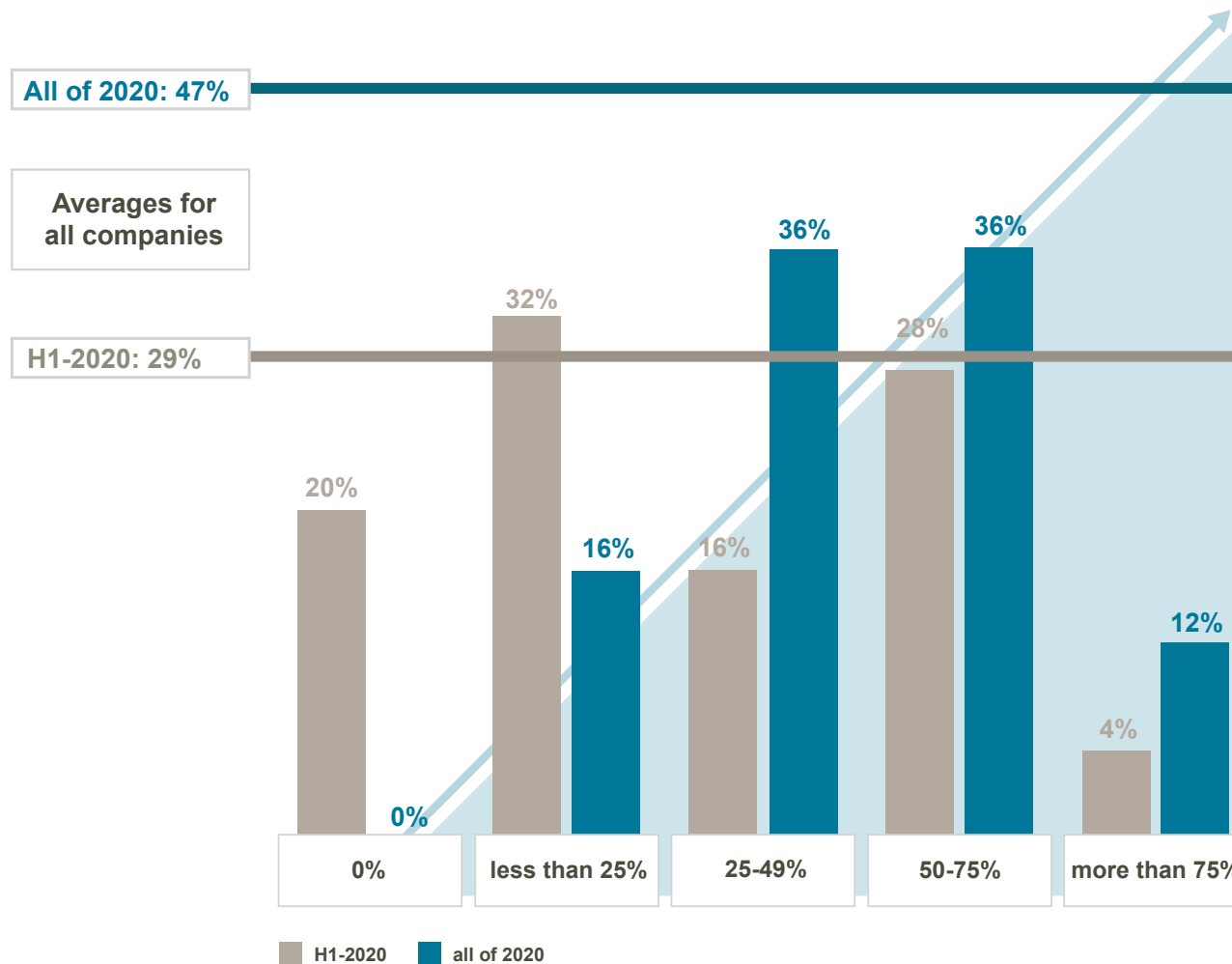


When do you believe exhibitions will open again in your city?

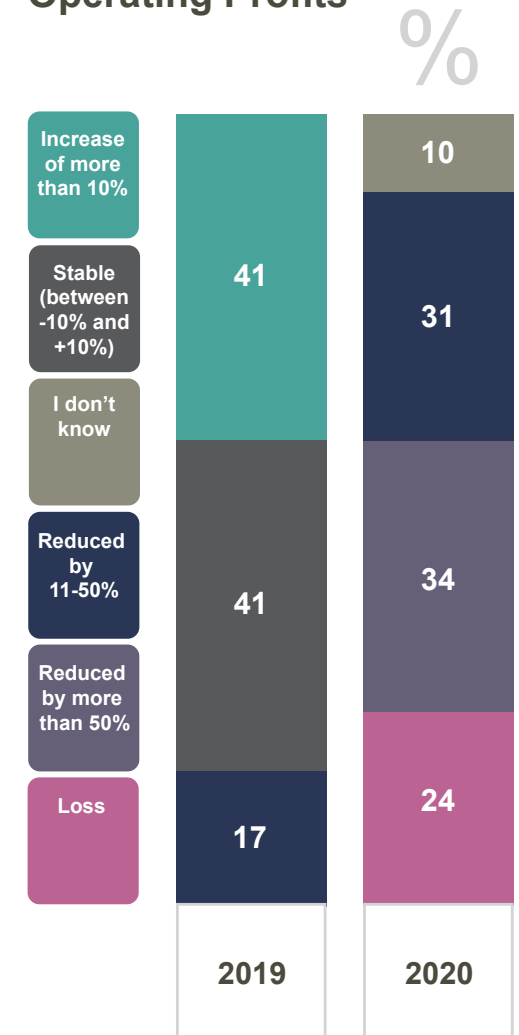




Revenue compared to last year (2019)

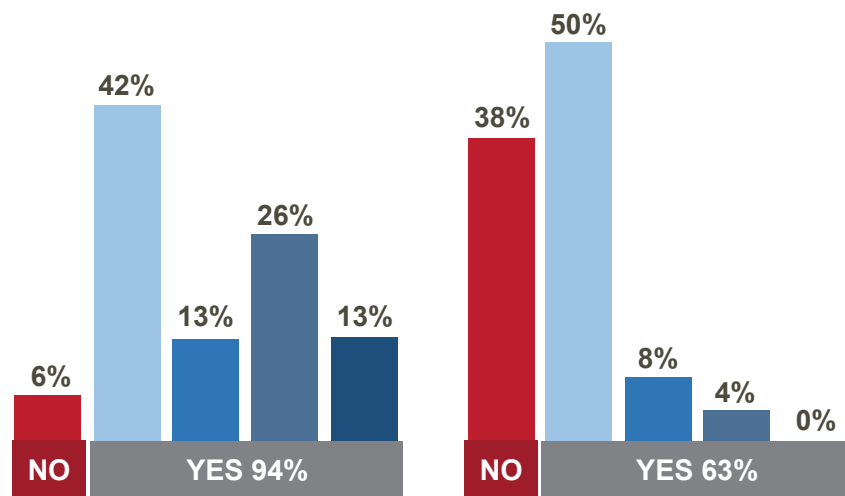


Operating Profits



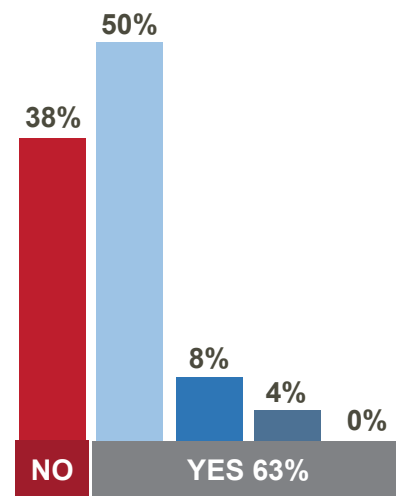


Did your company implement cost reductions?

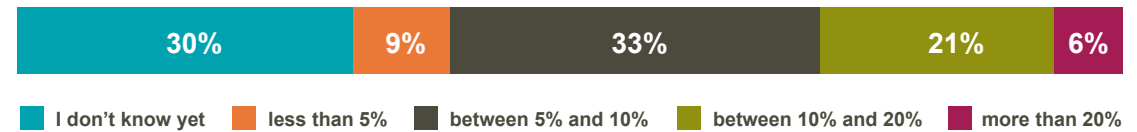


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

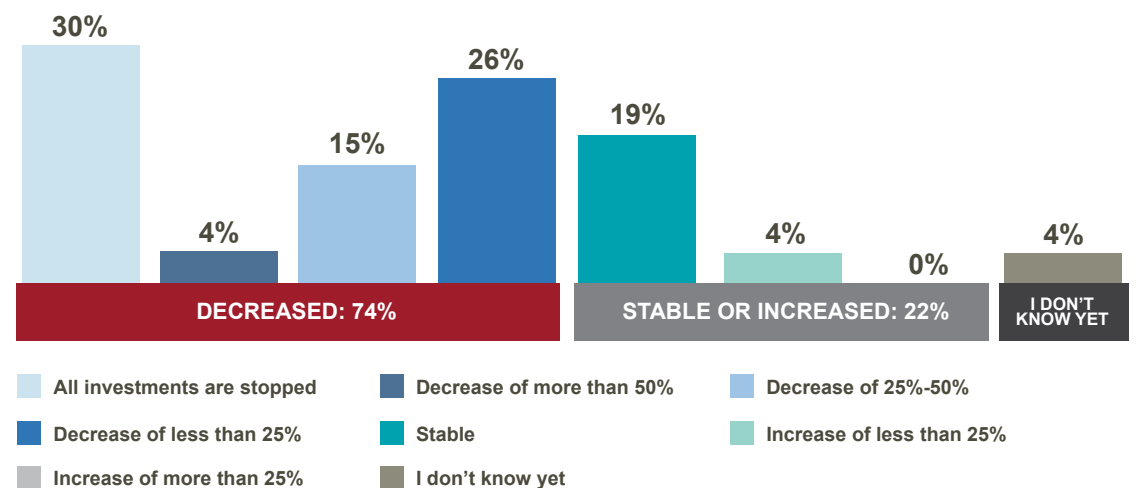
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





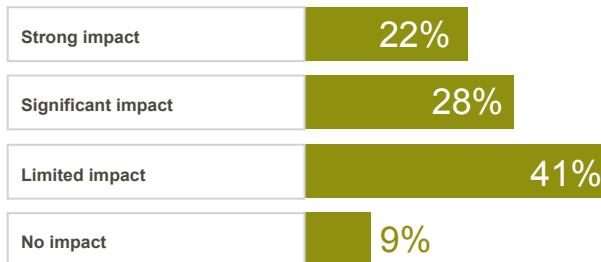
Digitalisation

How would you rate the transition of the exhibition industry?

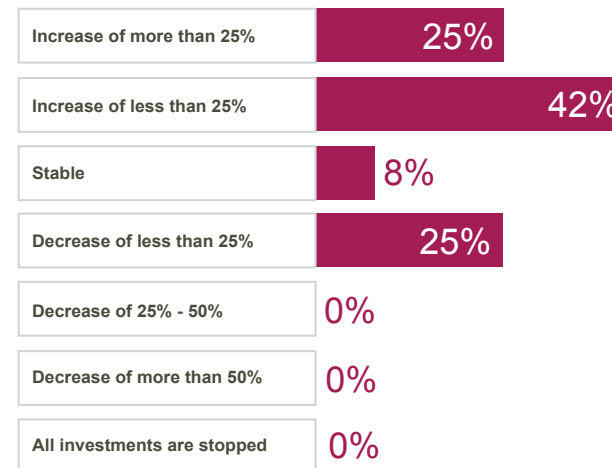
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





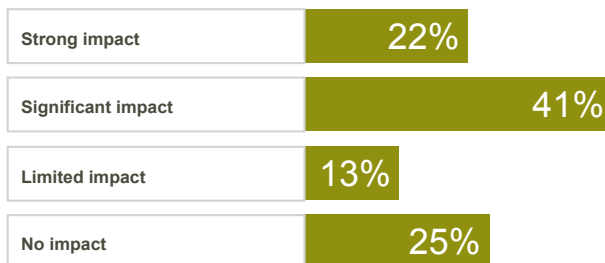
Diversity

How would you rate the transition of the exhibition industry?

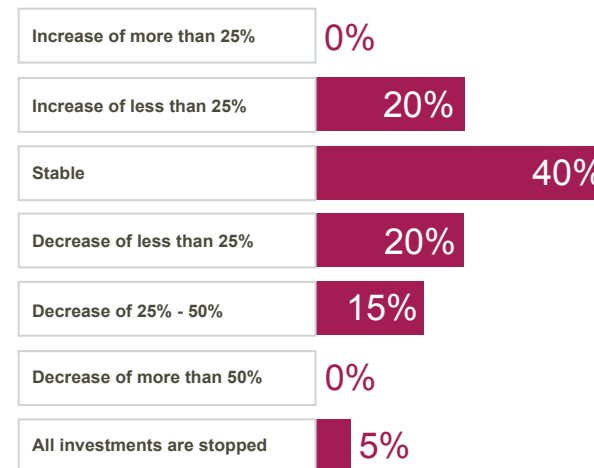
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



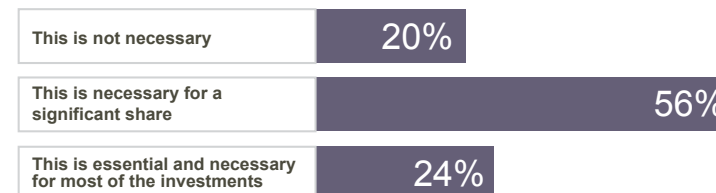
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





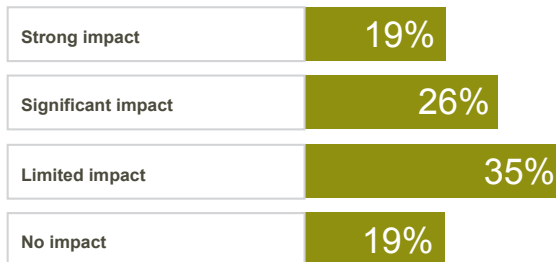
Sustainability

How would you rate the transition of the exhibition industry?

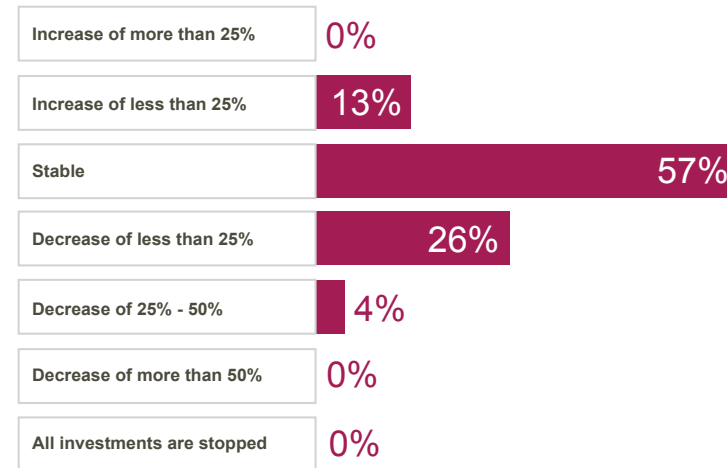
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



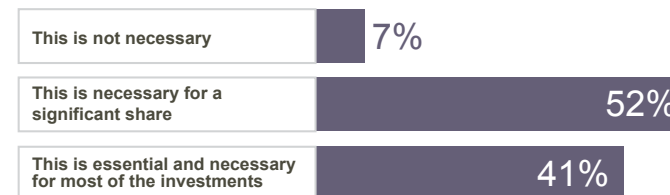
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



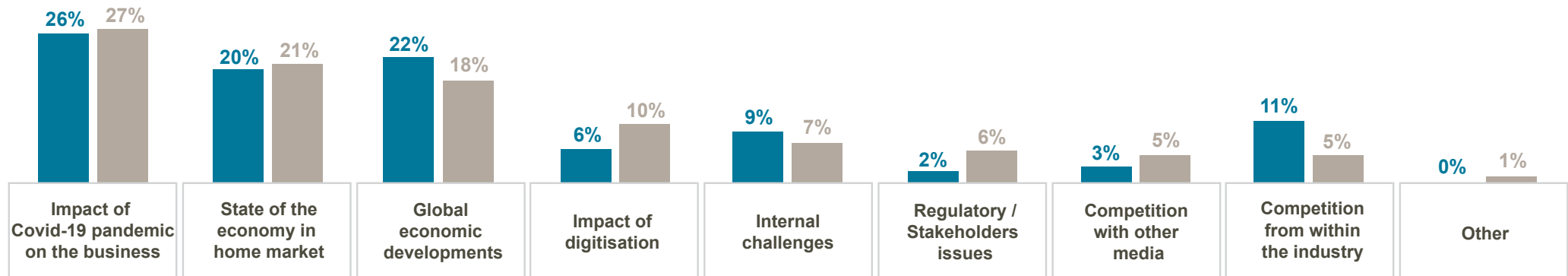
To what degree would you welcome some public investments in sustainability?





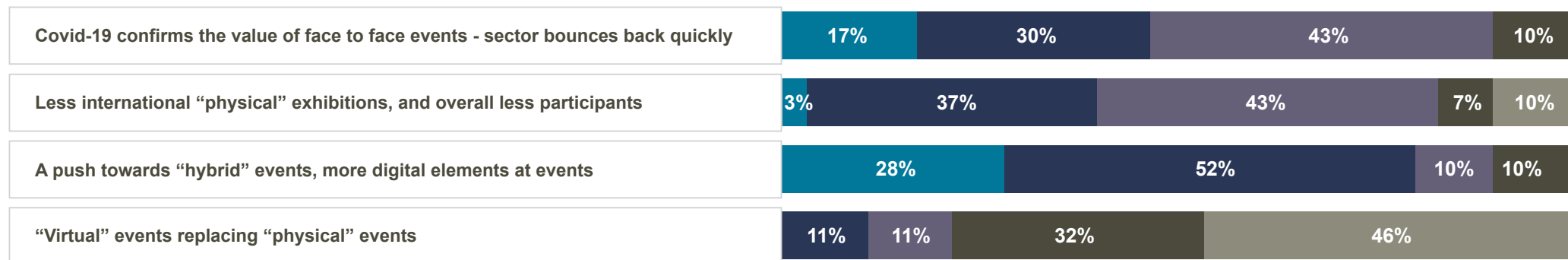
Most important business issues in the exhibition industry

China Global



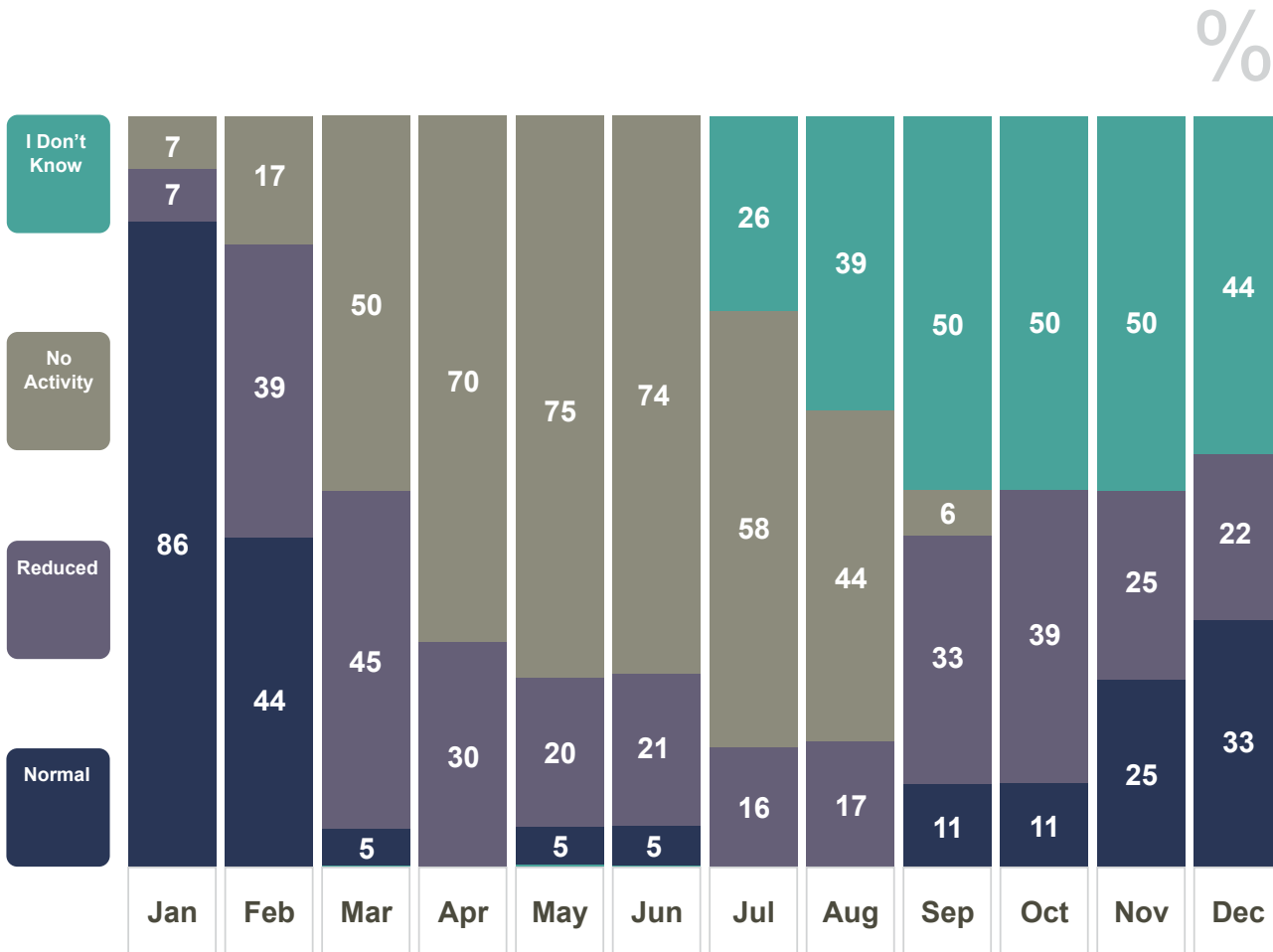
Format of exhibitions in the coming years

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

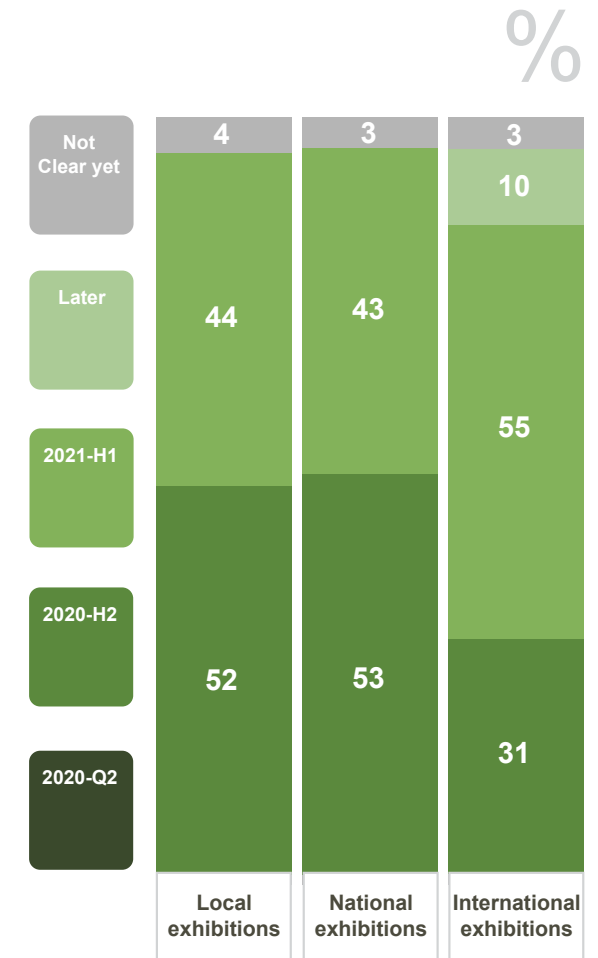




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

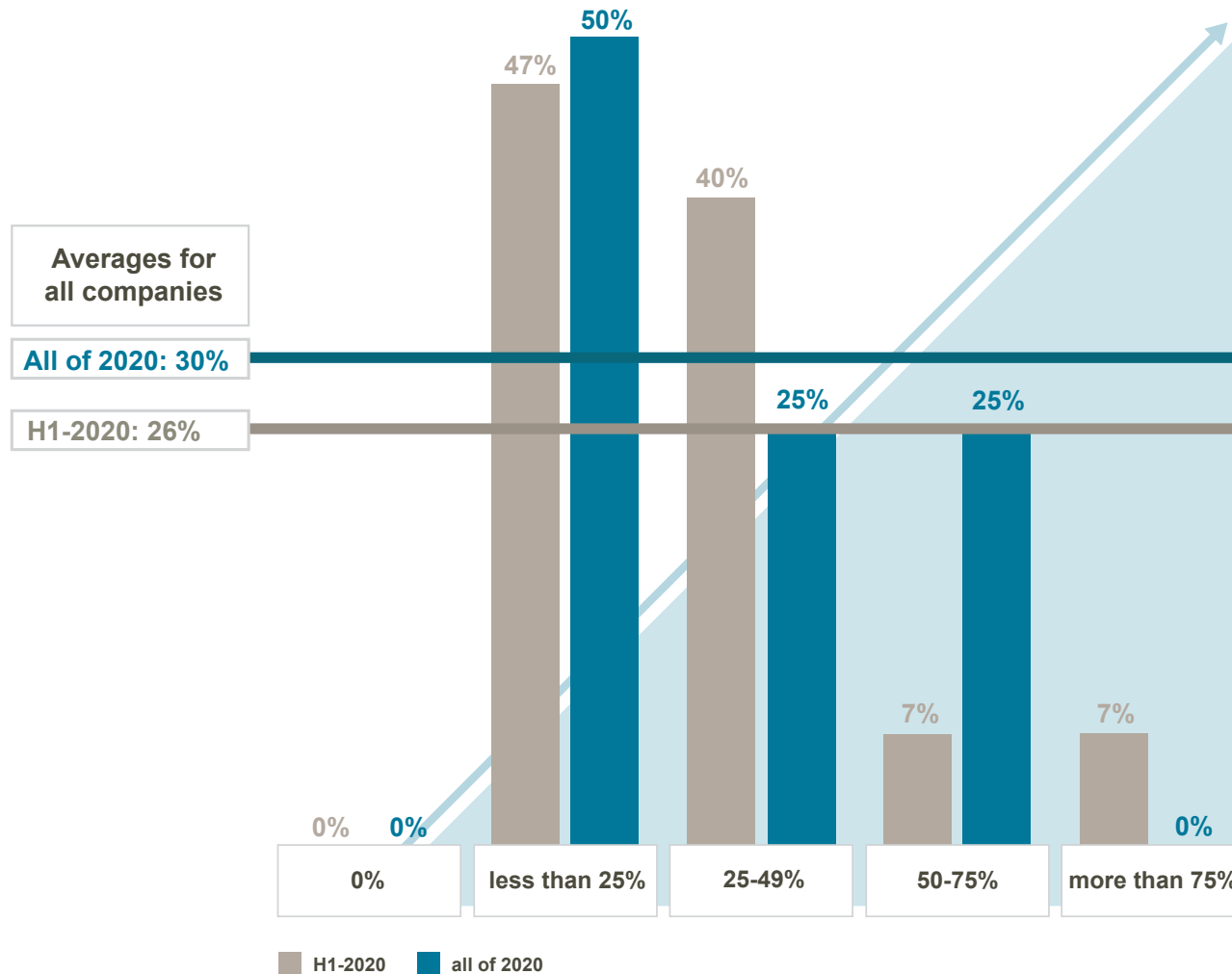


When do you believe exhibitions will open again in your city?

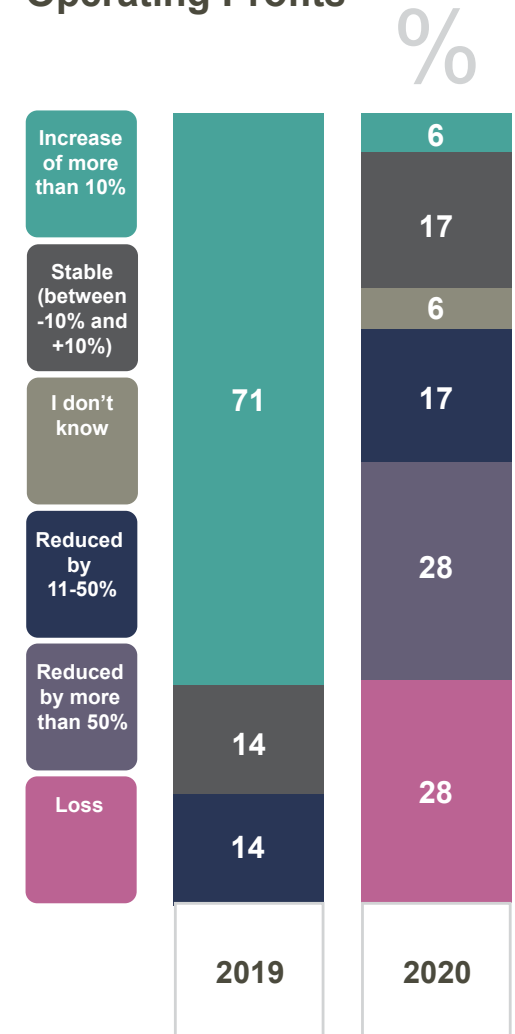




Revenue compared to last year (2019)

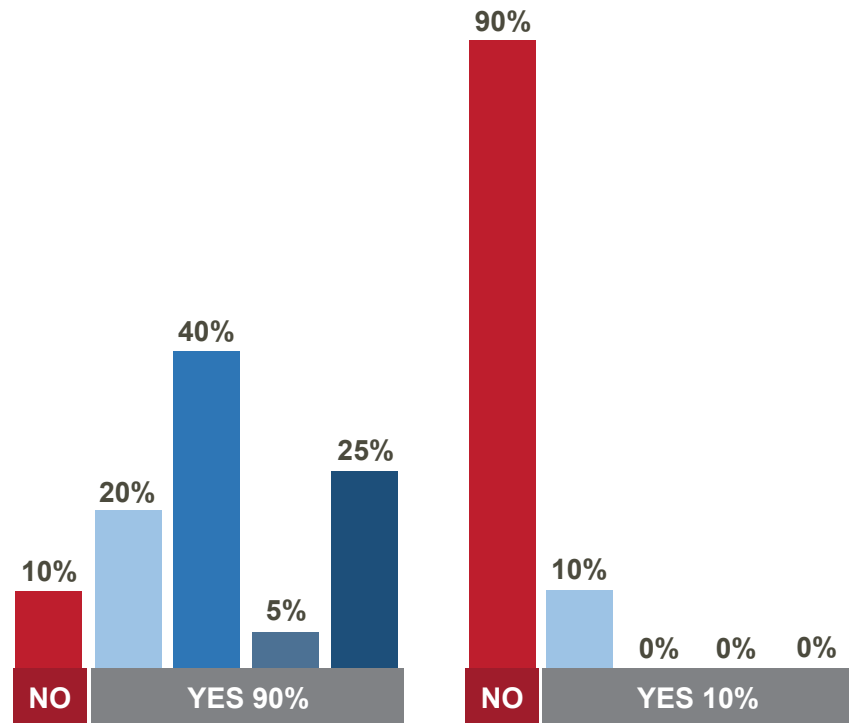


Operating Profits



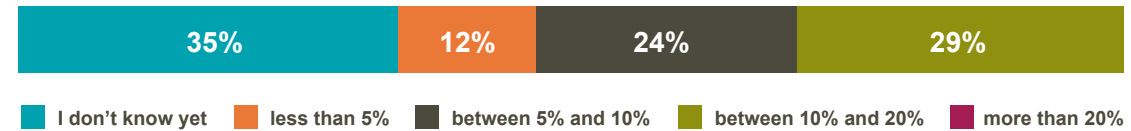


Did your company implement cost reductions?

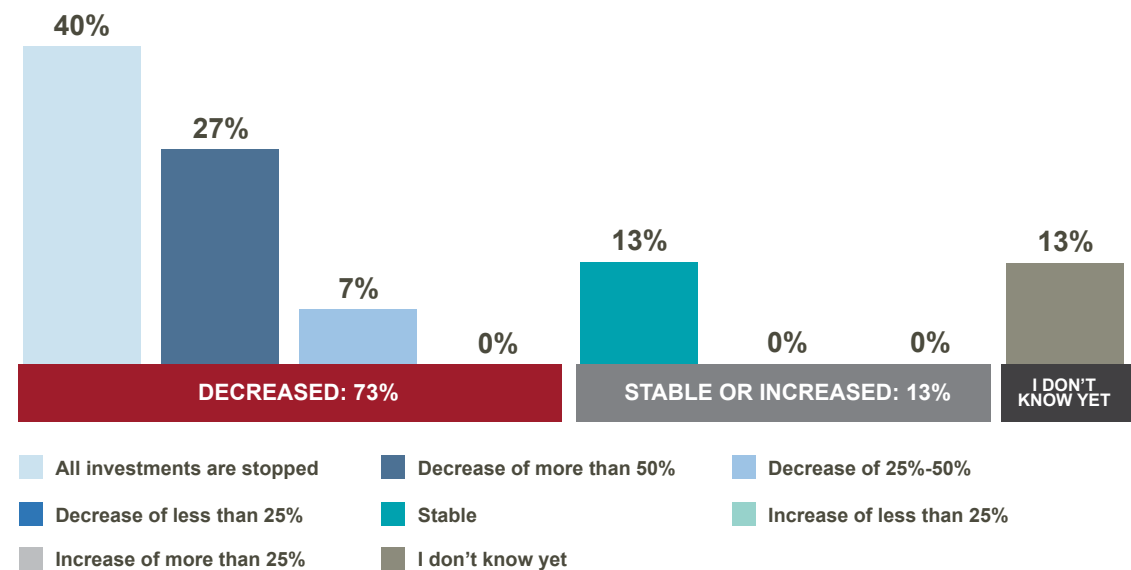


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





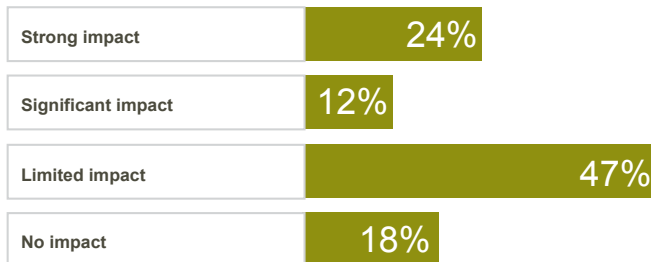
Digitalisation

How would you rate the transition of the exhibition industry?

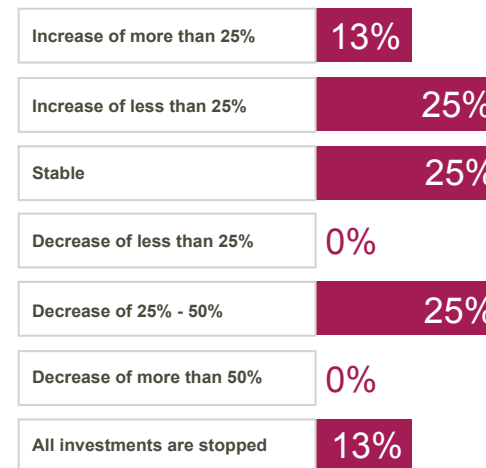
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





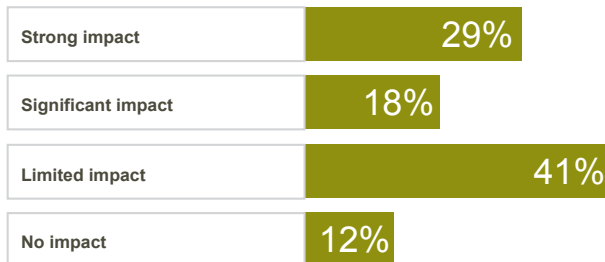
Diversity

How would you rate the transition of the exhibition industry?

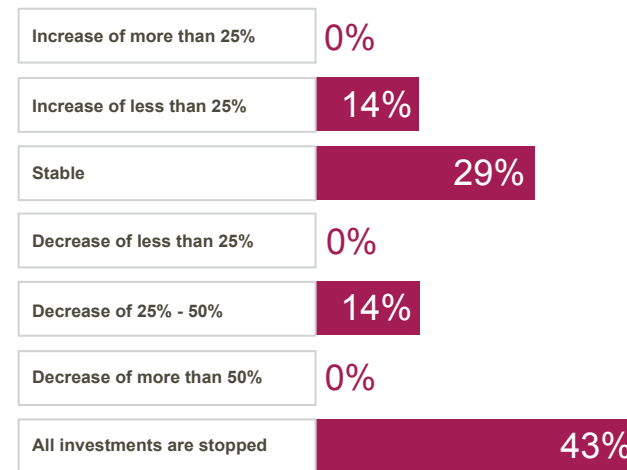
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



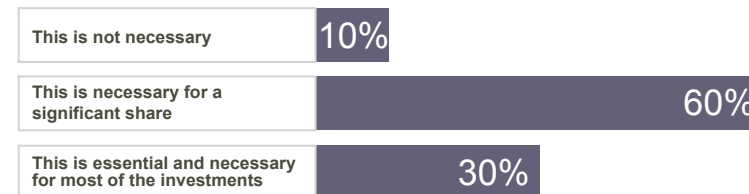
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





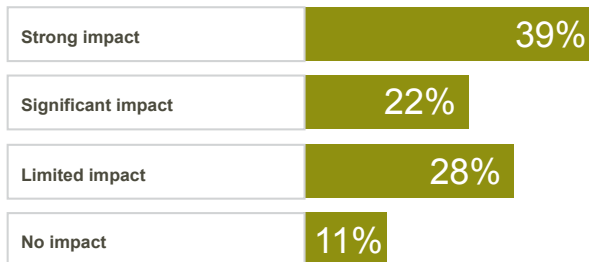
Sustainability

How would you rate the transition of the exhibition industry?

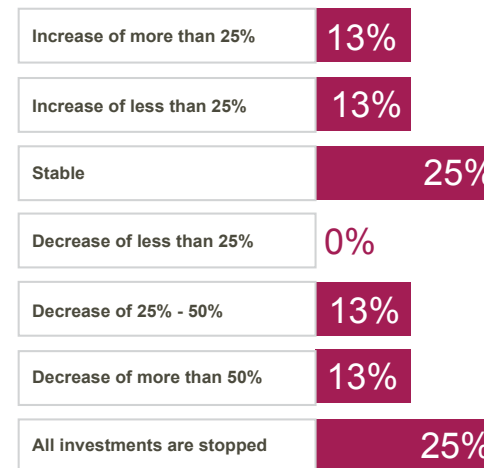
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



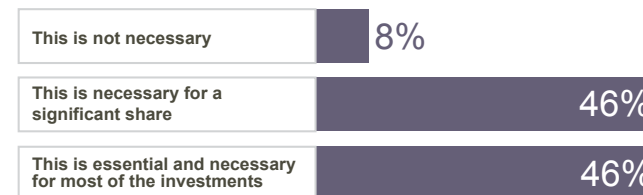
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



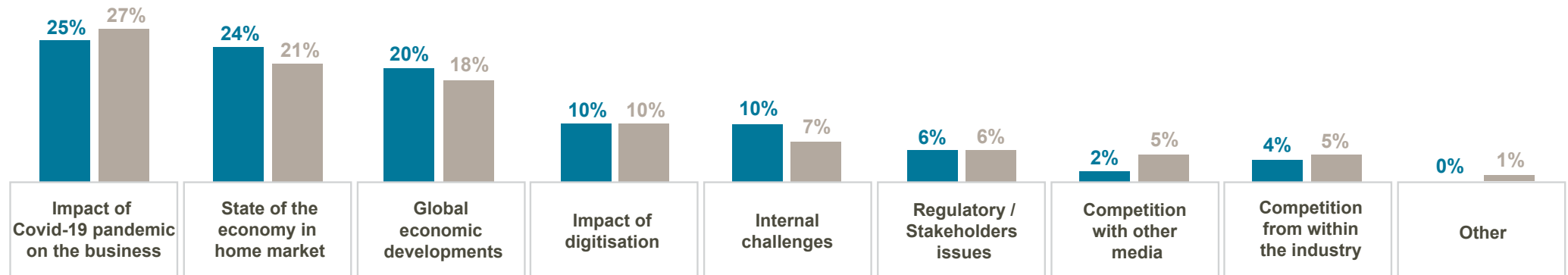
To what degree would you welcome some public investments in sustainability?





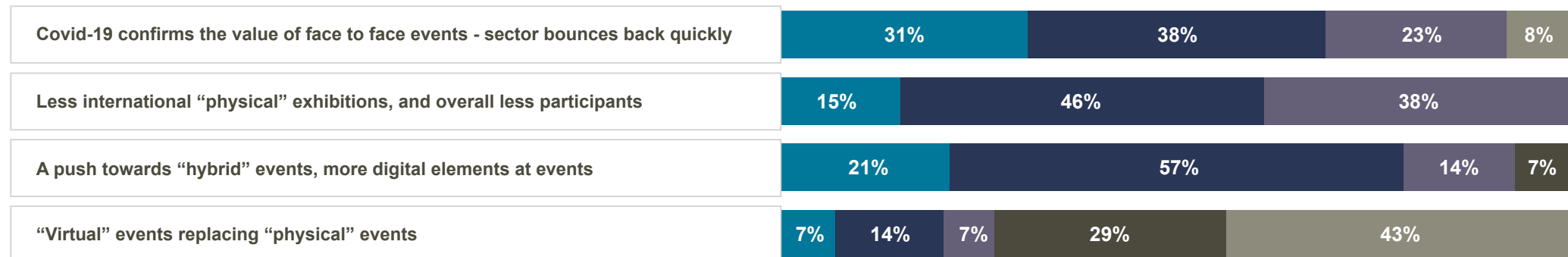
Most important business issues in the exhibition industry

India Global



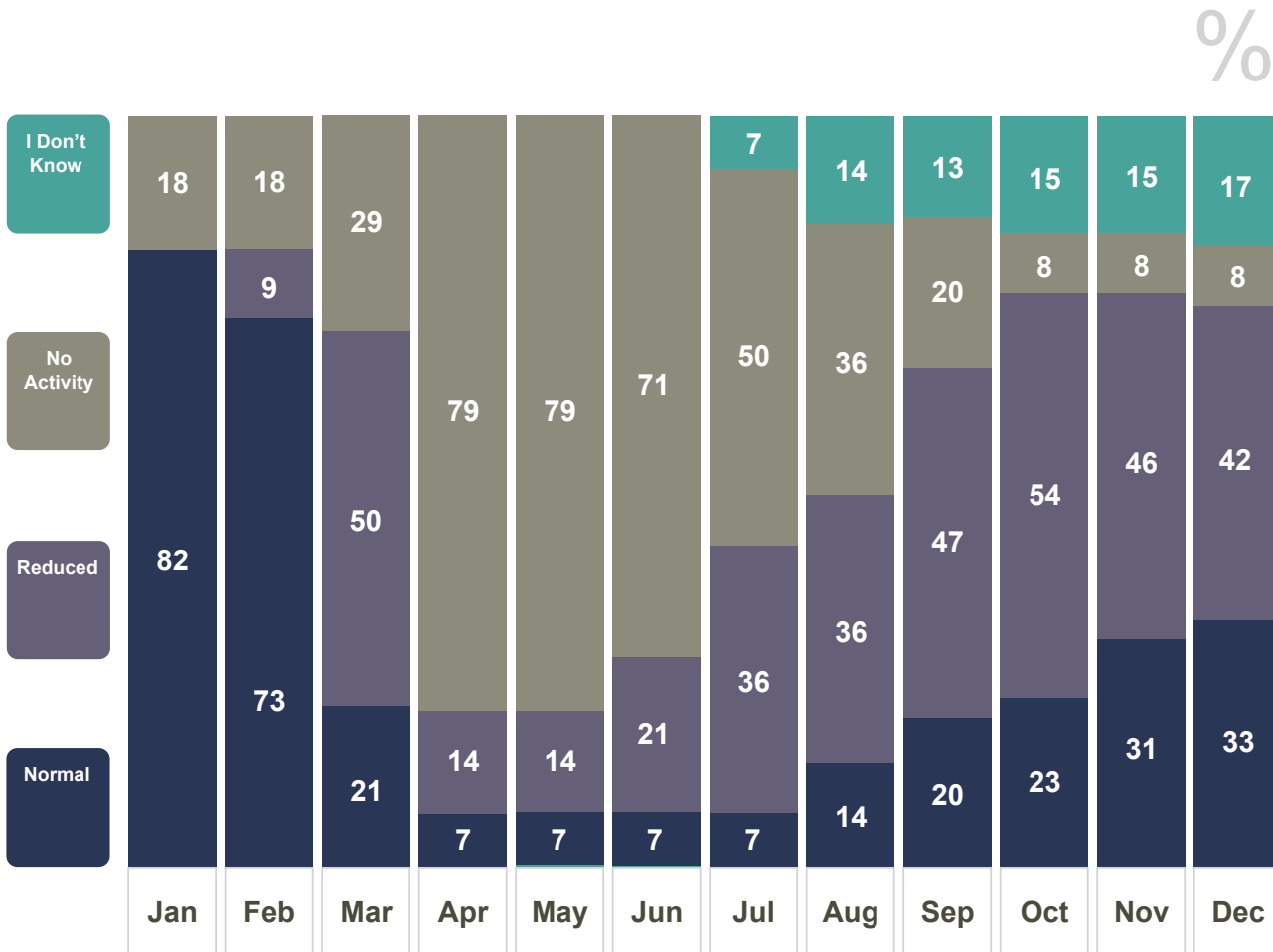
Format of exhibitions in the coming years

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

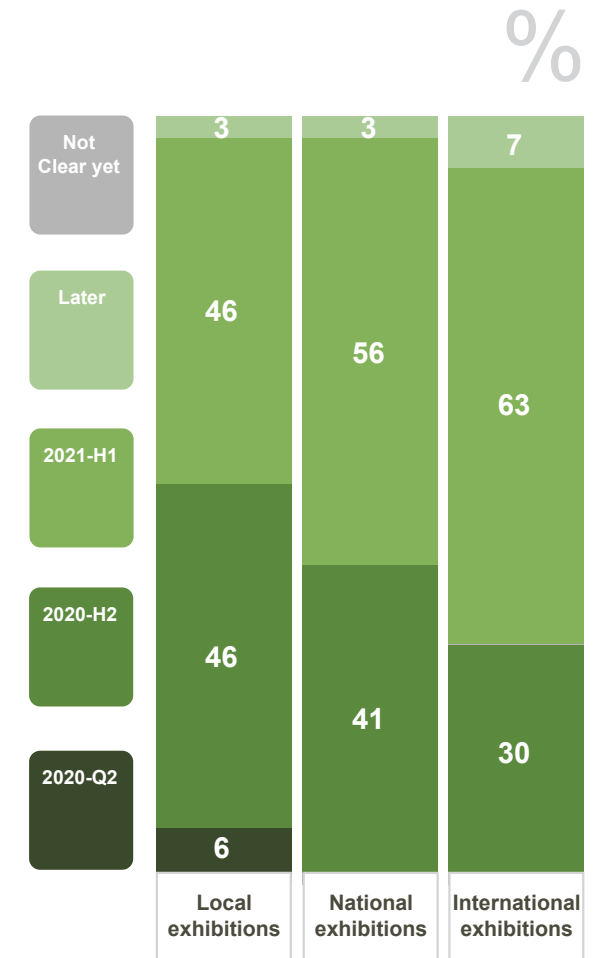




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

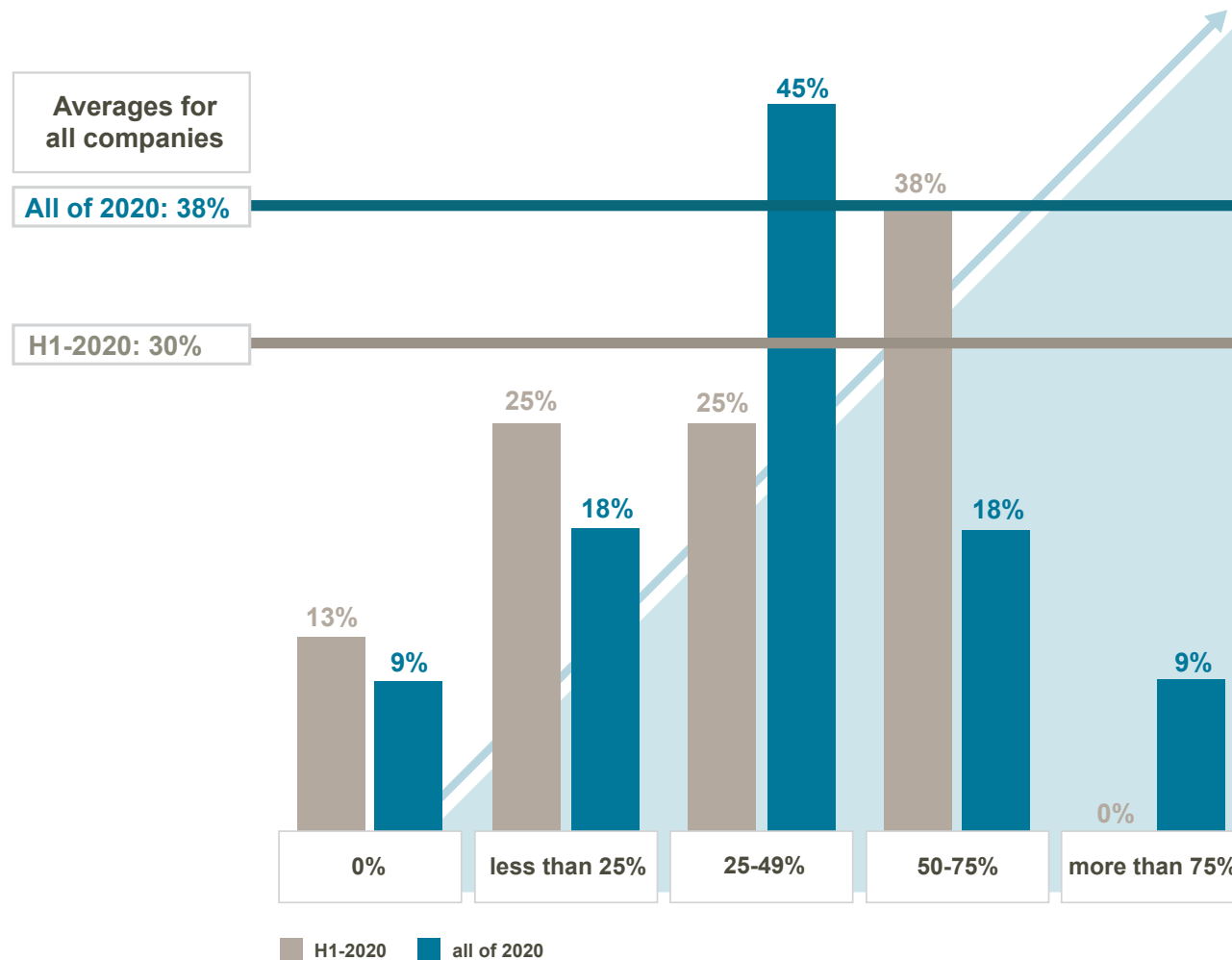


When do you believe exhibitions will open again in your city?

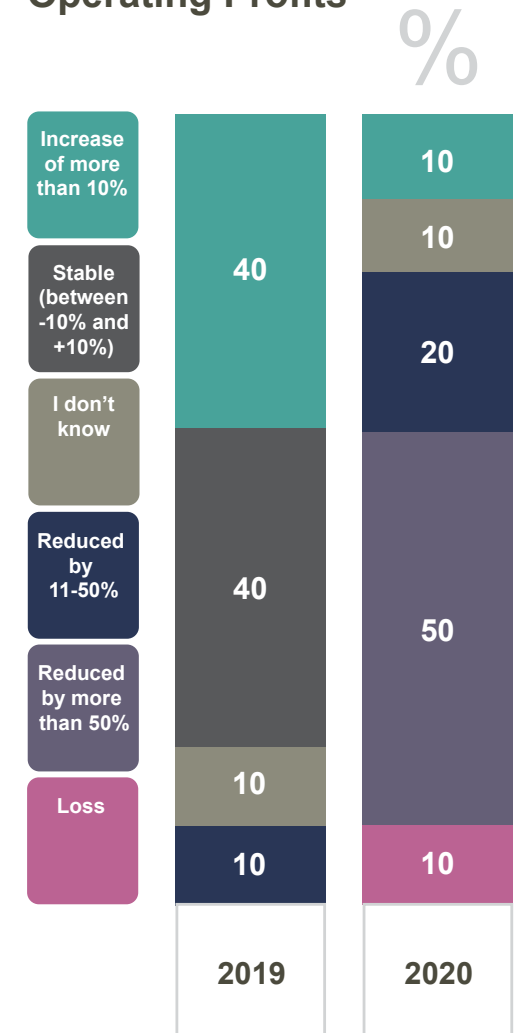




Revenue compared to last year (2019)

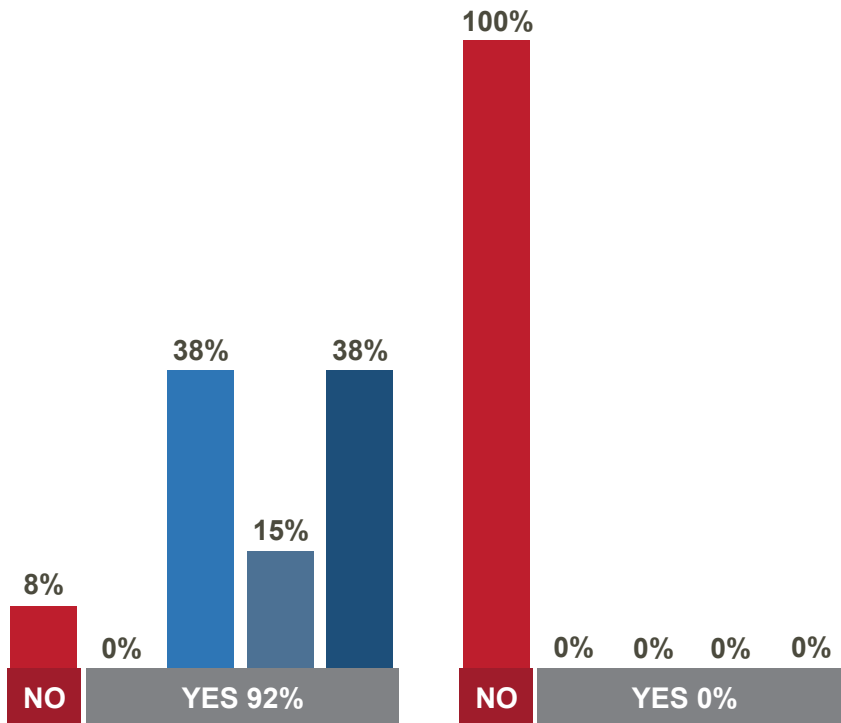


Operating Profits





Did your company implement cost reductions?



- 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

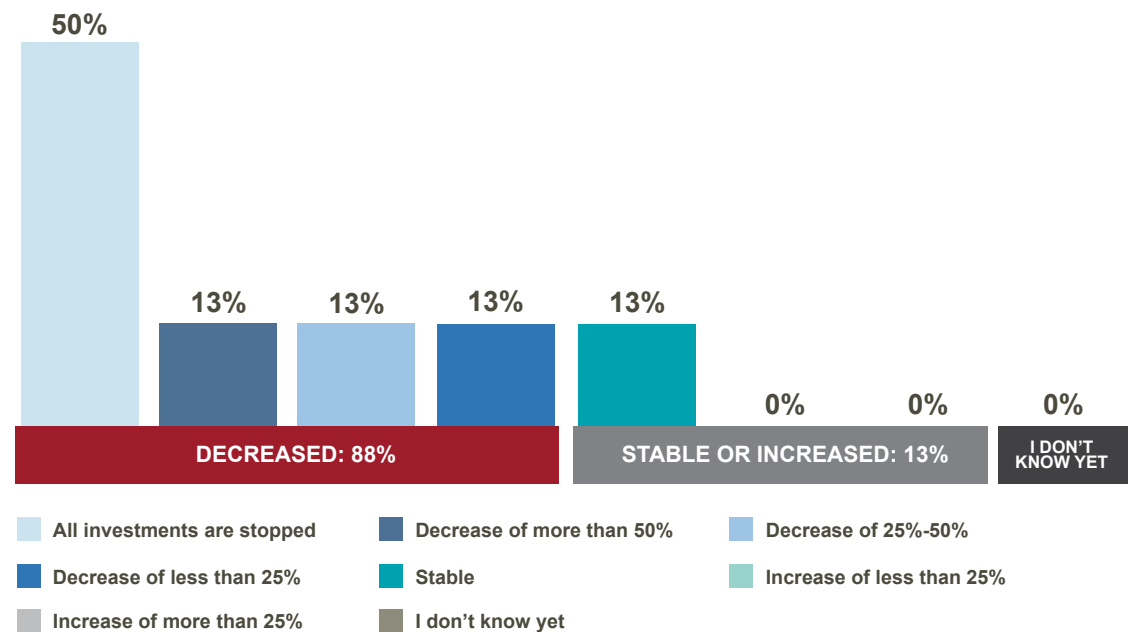
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





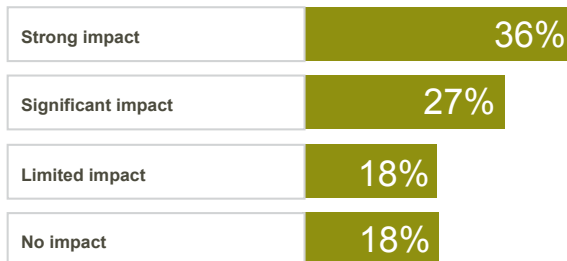
Digitalisation

How would you rate the transition of the exhibition industry?

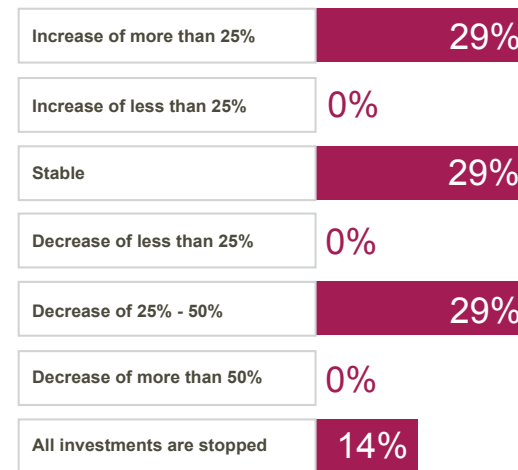
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



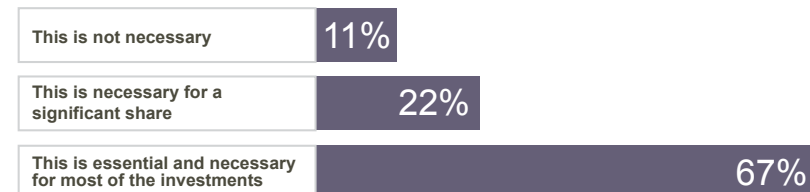
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





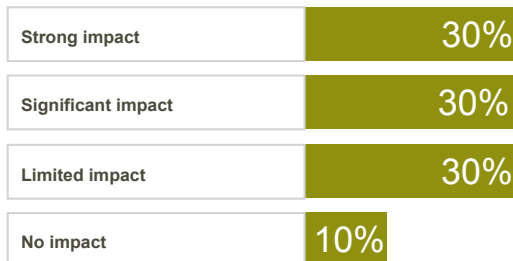
Diversity

How would you rate the transition of the exhibition industry?

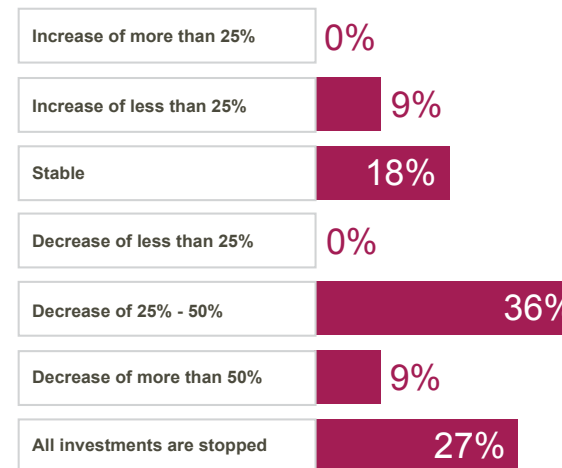
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



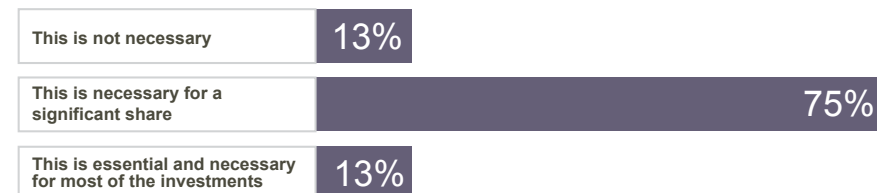
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





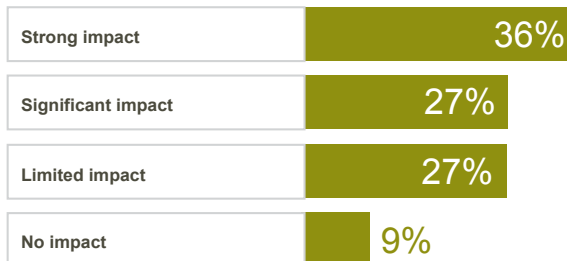
Sustainability

How would you rate the transition of the exhibition industry?

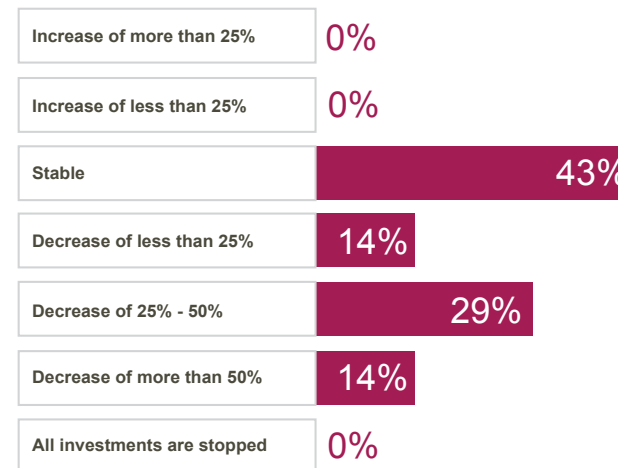
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



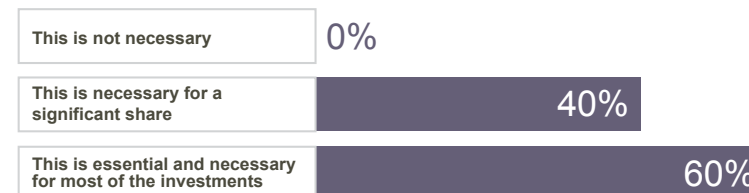
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



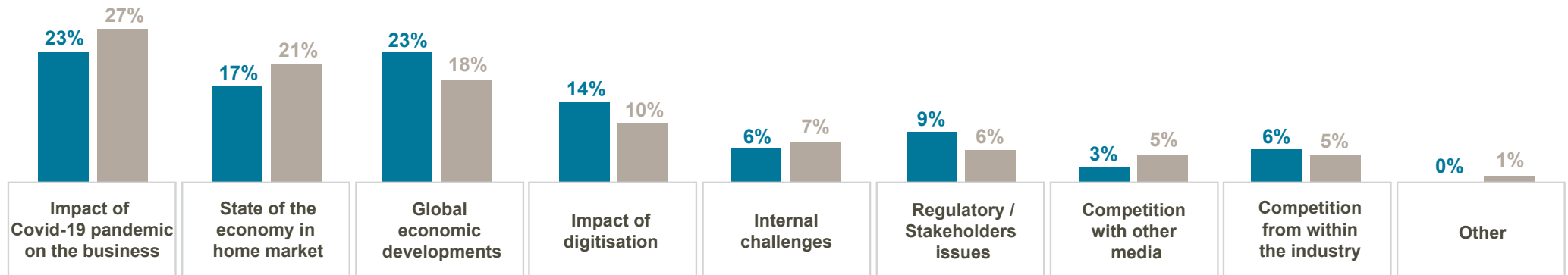
To what degree would you welcome some public investments in sustainability?





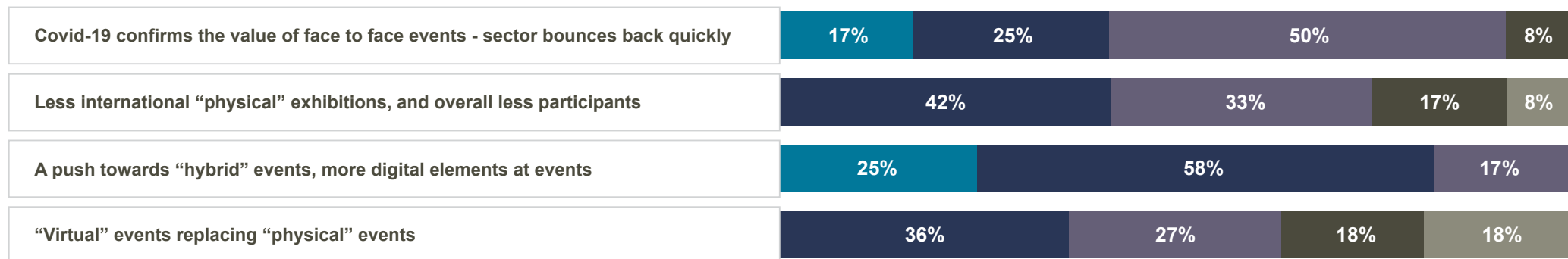
Most important business issues in the exhibition industry

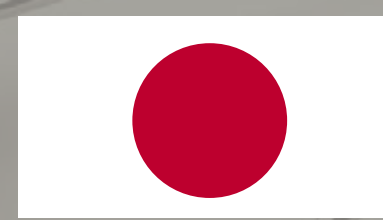
Indonesia
Global



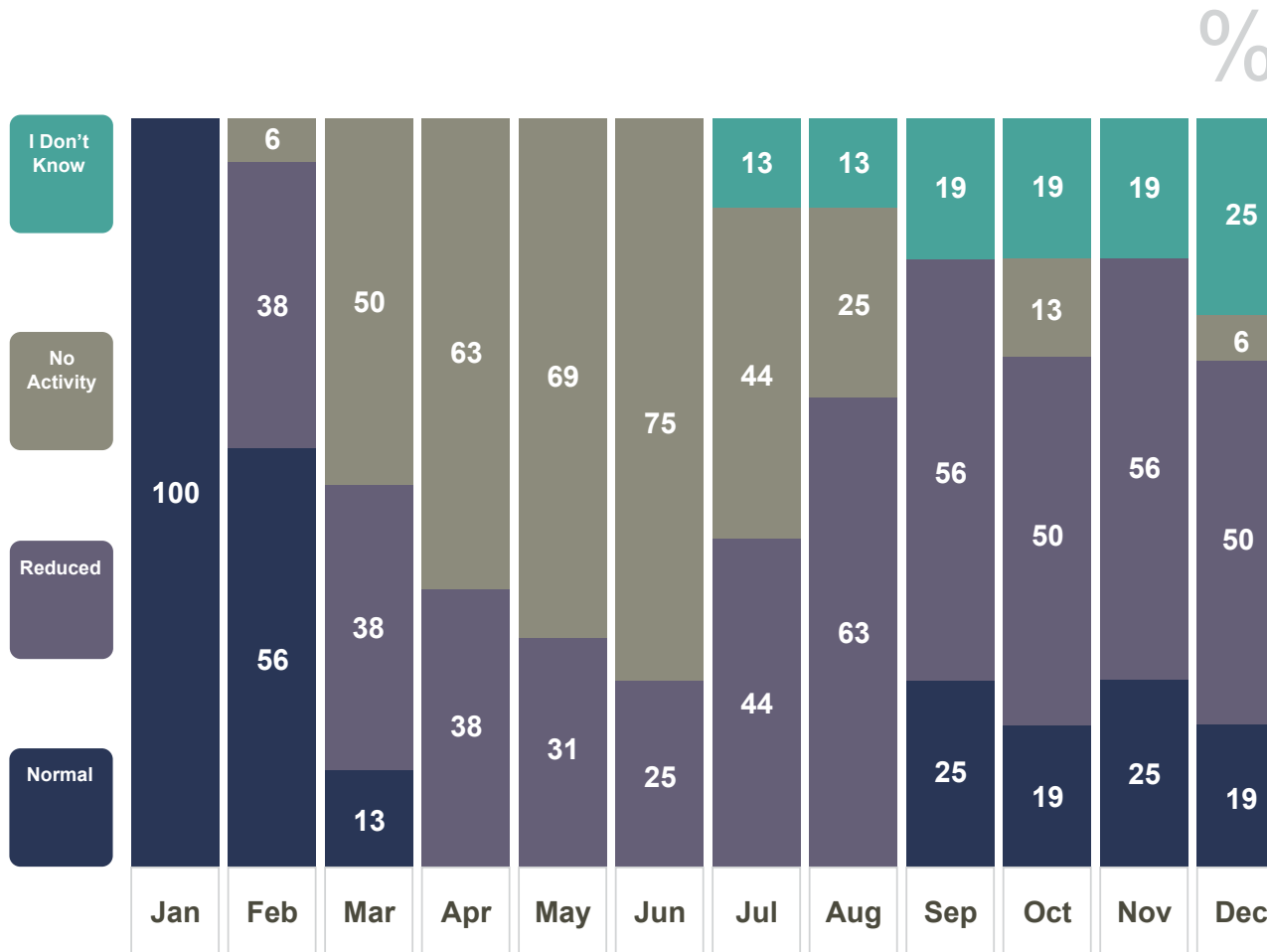
Format of exhibitions in the coming years

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

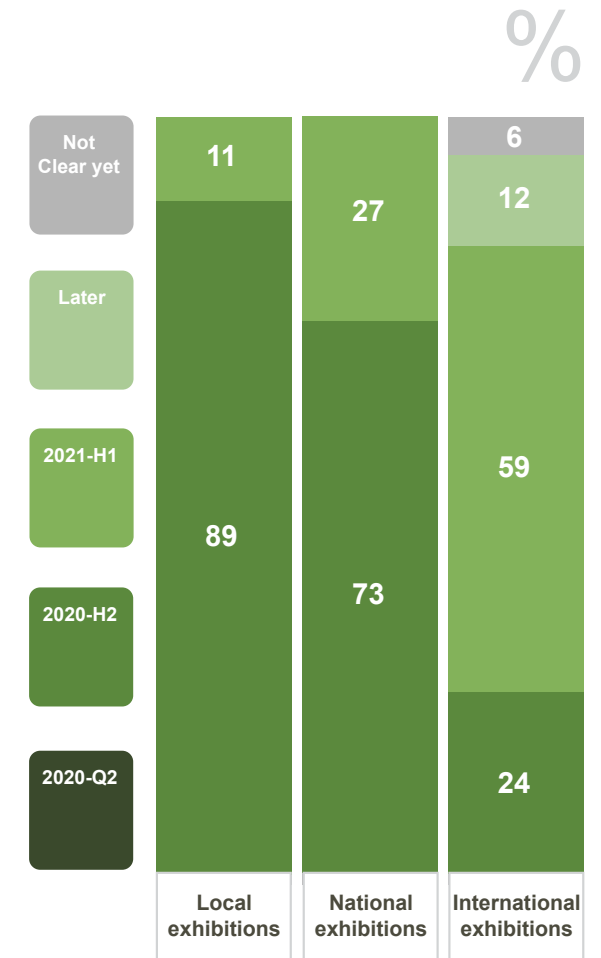


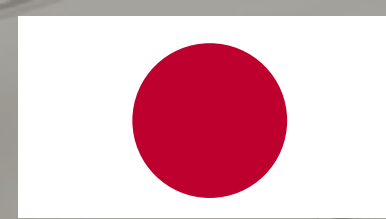


Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

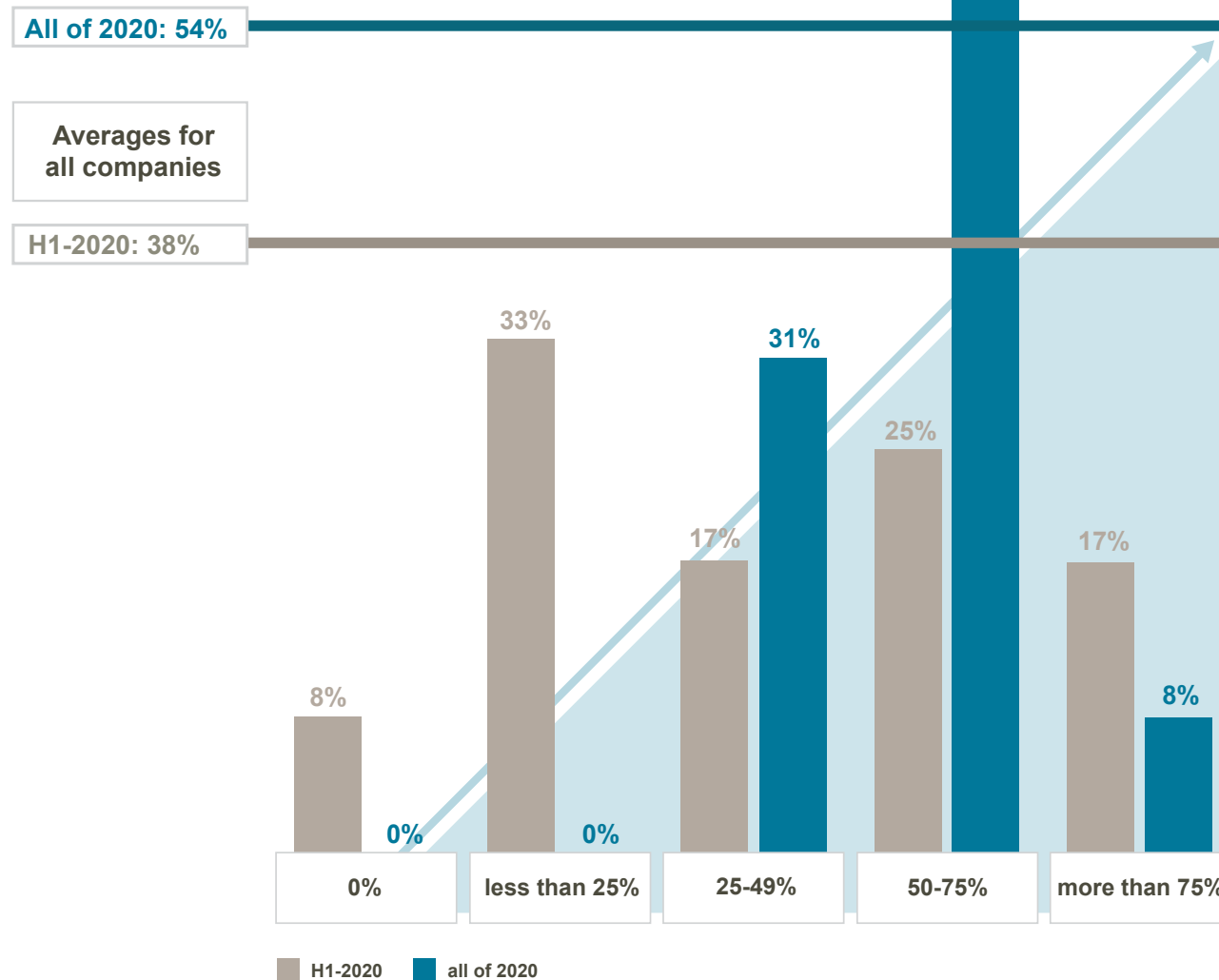


When do you believe exhibitions will open again in your city?

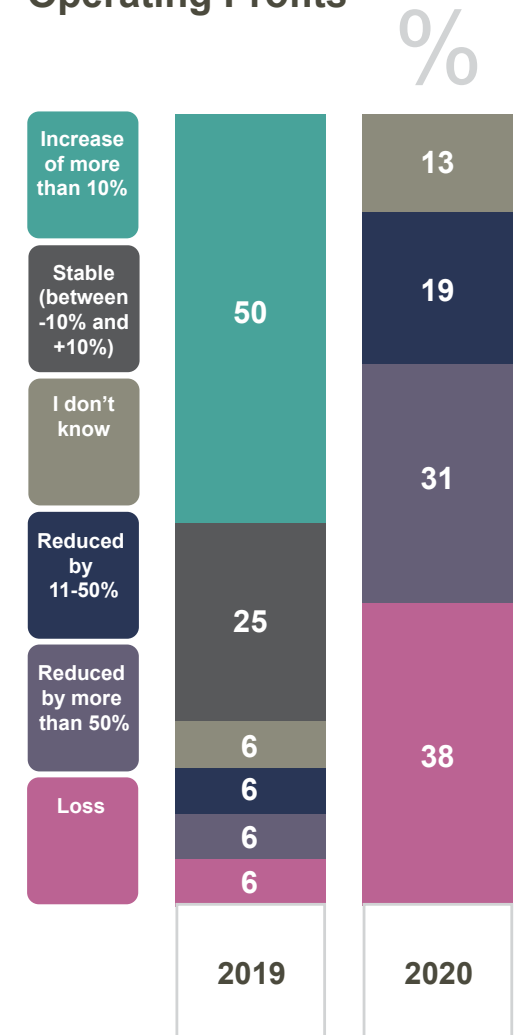


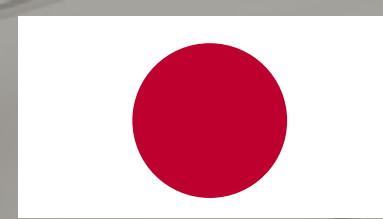


Revenue compared to last year (2019)

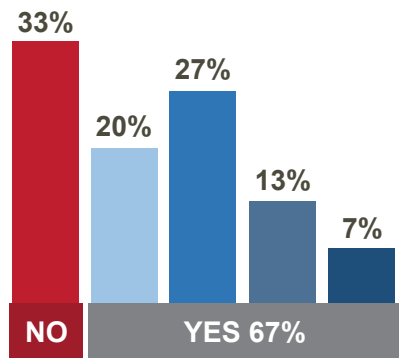


Operating Profits





Did your company implement cost reductions?

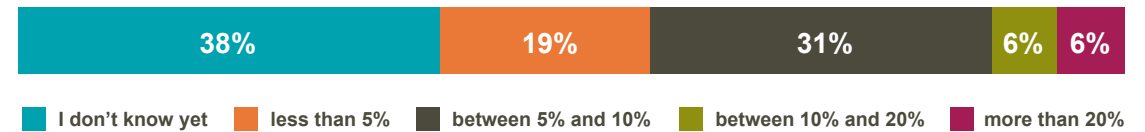


Did your company benefit from public financial support?

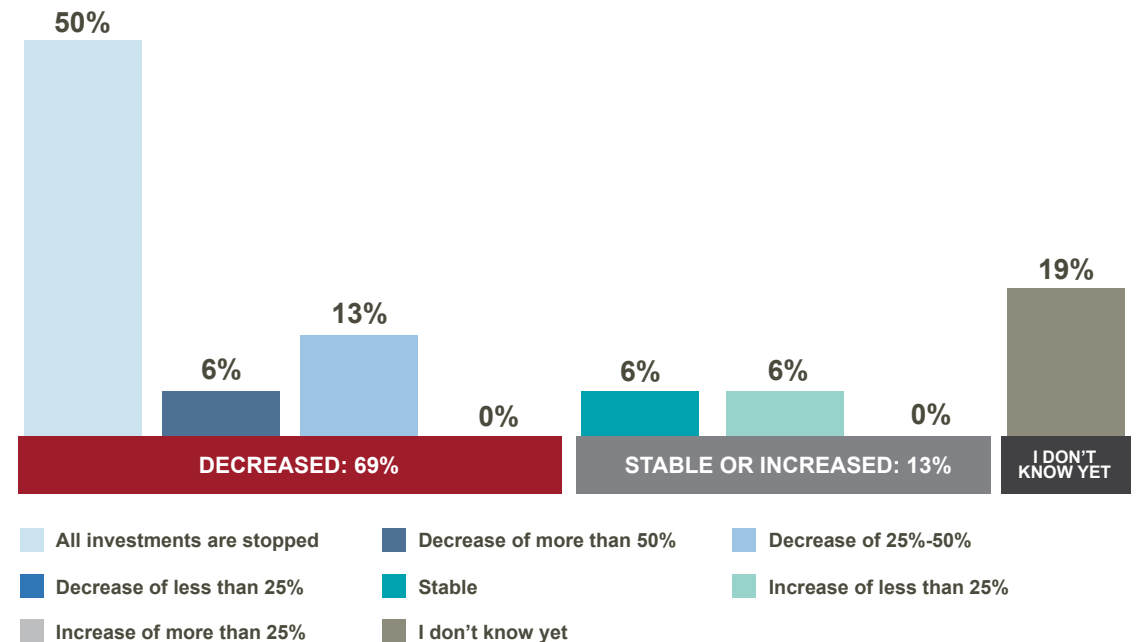


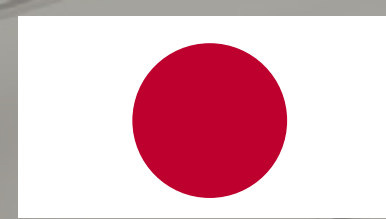
- No
- Yes, for less than 10% of our 2019 overall costs
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Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





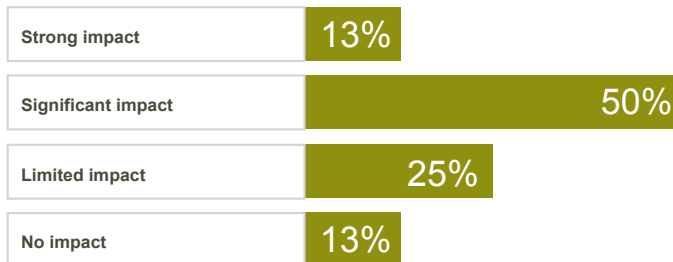
Digitalisation

How would you rate the transition of the exhibition industry?

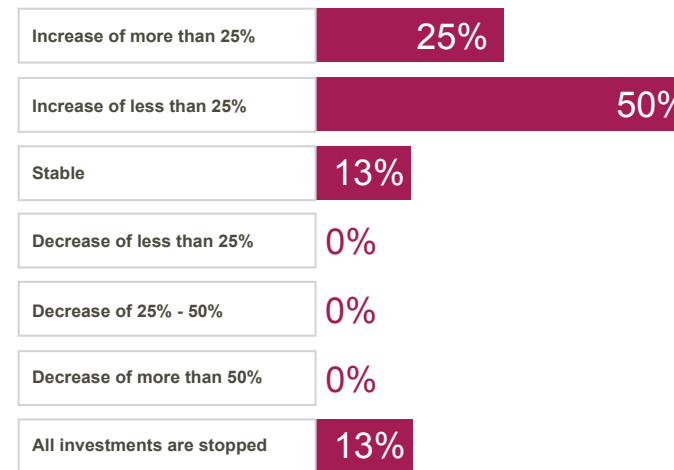
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?

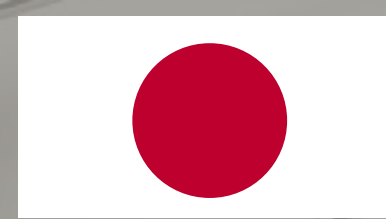


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





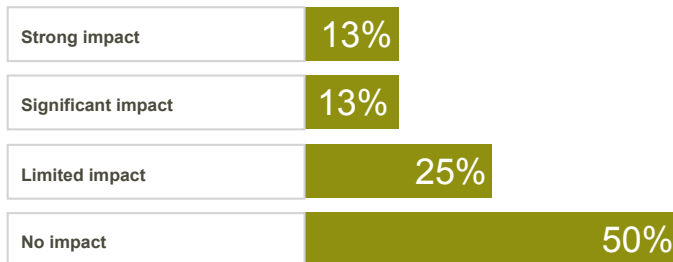
Diversity

How would you rate the transition of the exhibition industry?

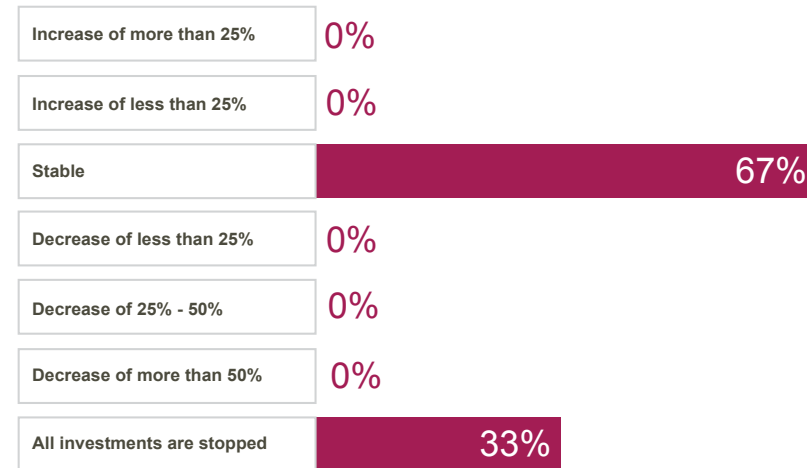
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



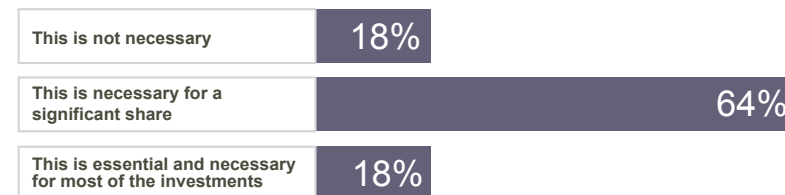
To what extent has Covid-19 impacted your company activities in diversity?

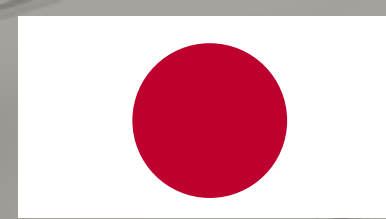


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





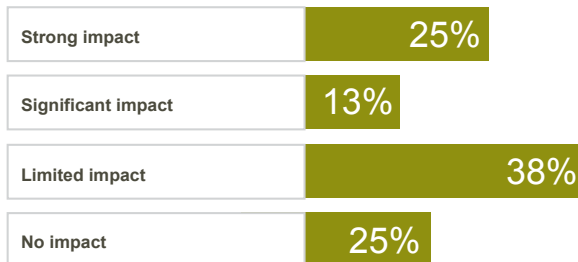
Sustainability

How would you rate the transition of the exhibition industry?

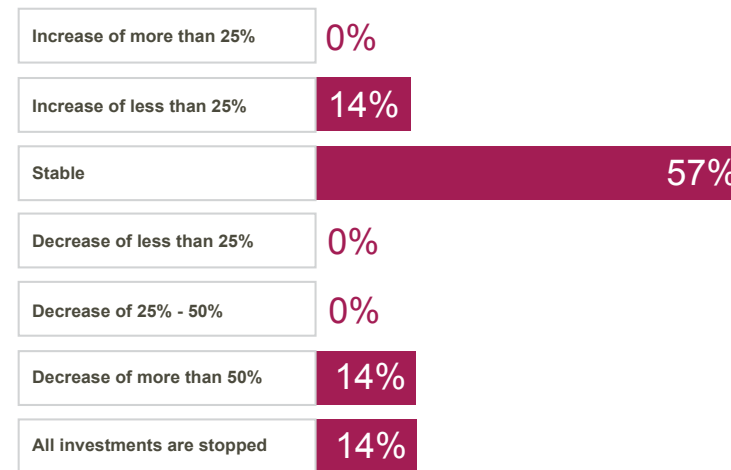
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



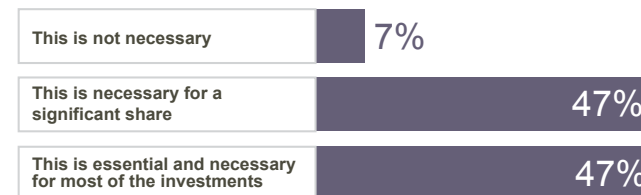
To what extent has Covid-19 impacted your company activities in sustainability?

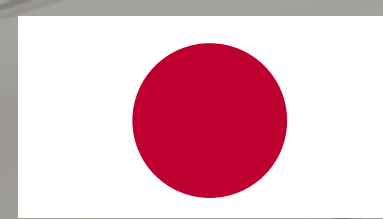


How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



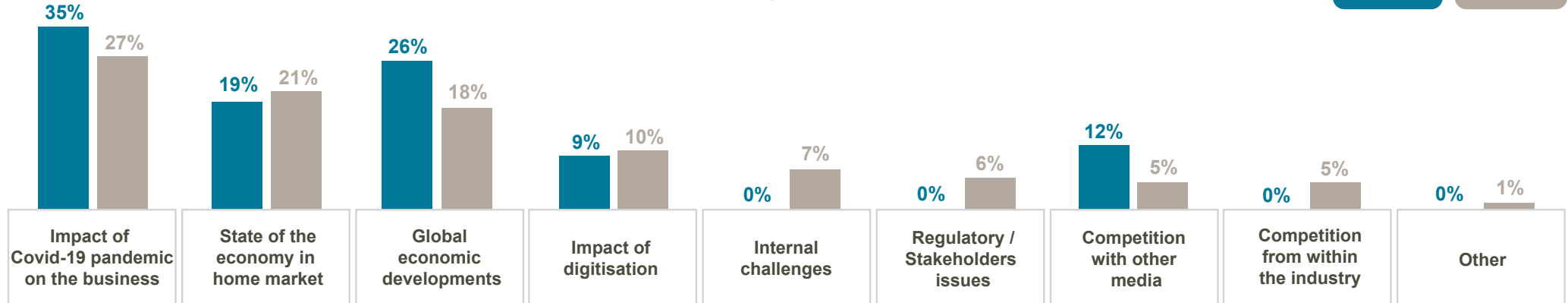
To what degree would you welcome some public investments in sustainability?





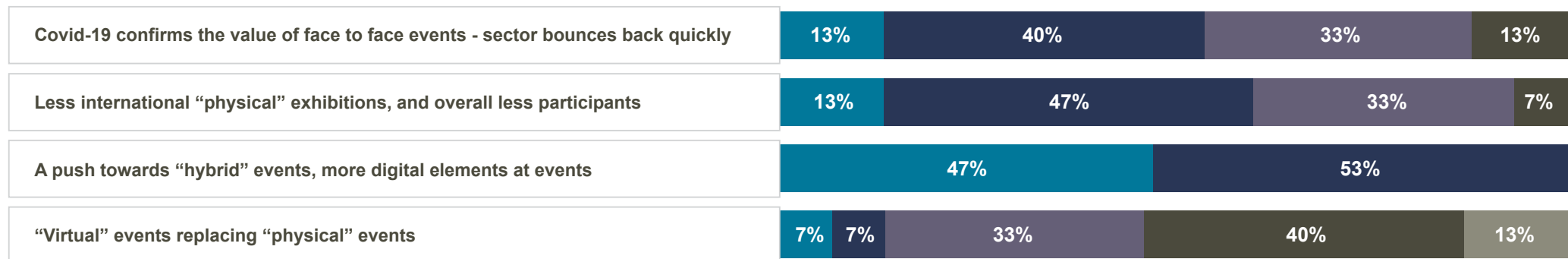
Most important business issues in the exhibition industry

Japan Global



Format of exhibitions in the coming years

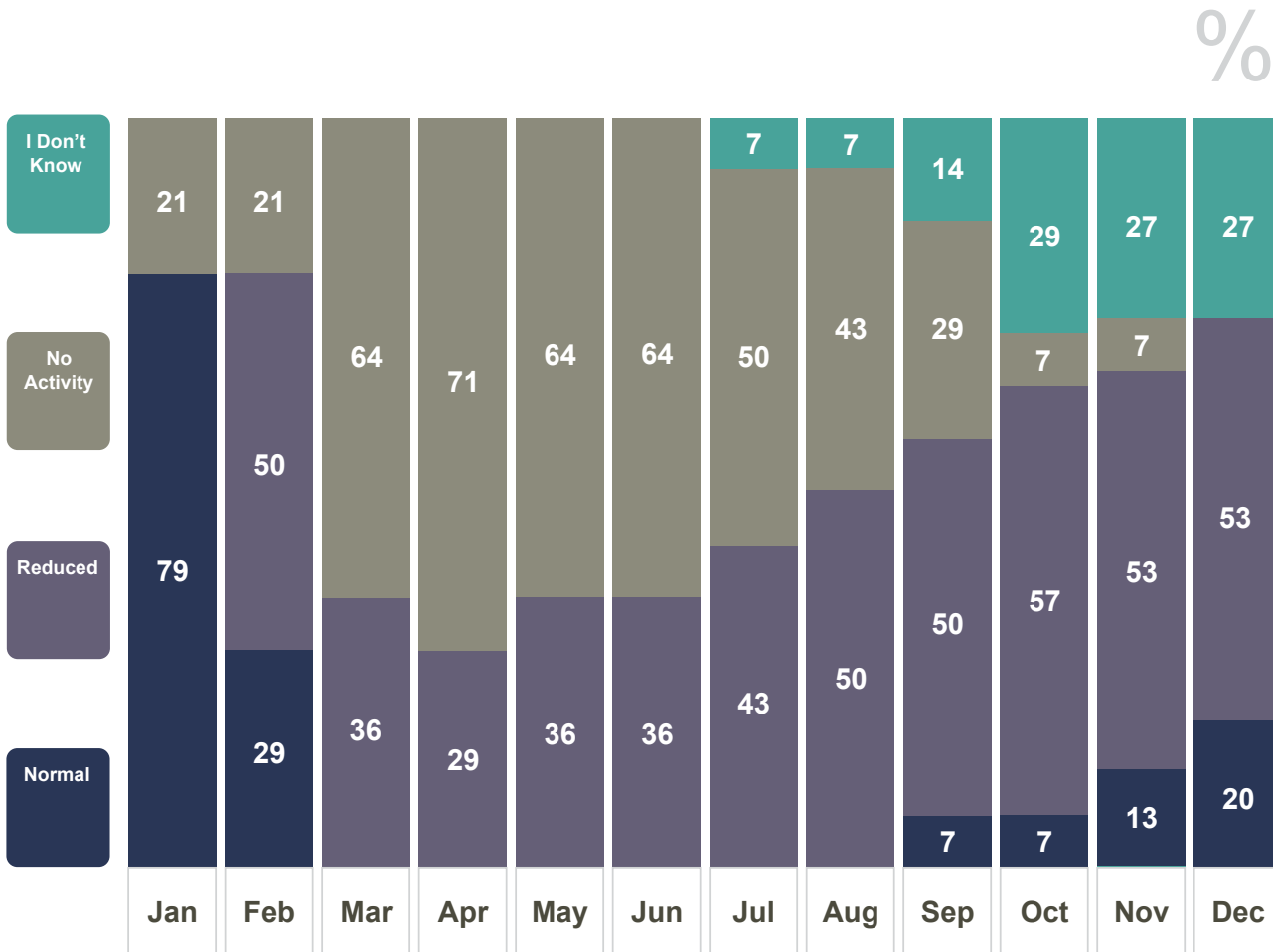
Yes, for sure Most probably Not sure Not sure at all Definitely not



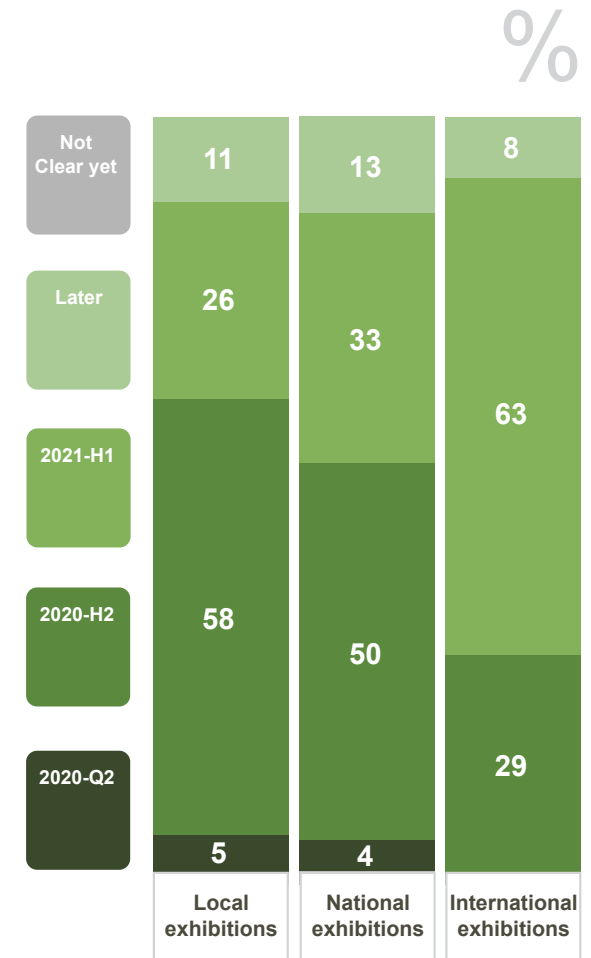
Detailed results for Singapore



Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

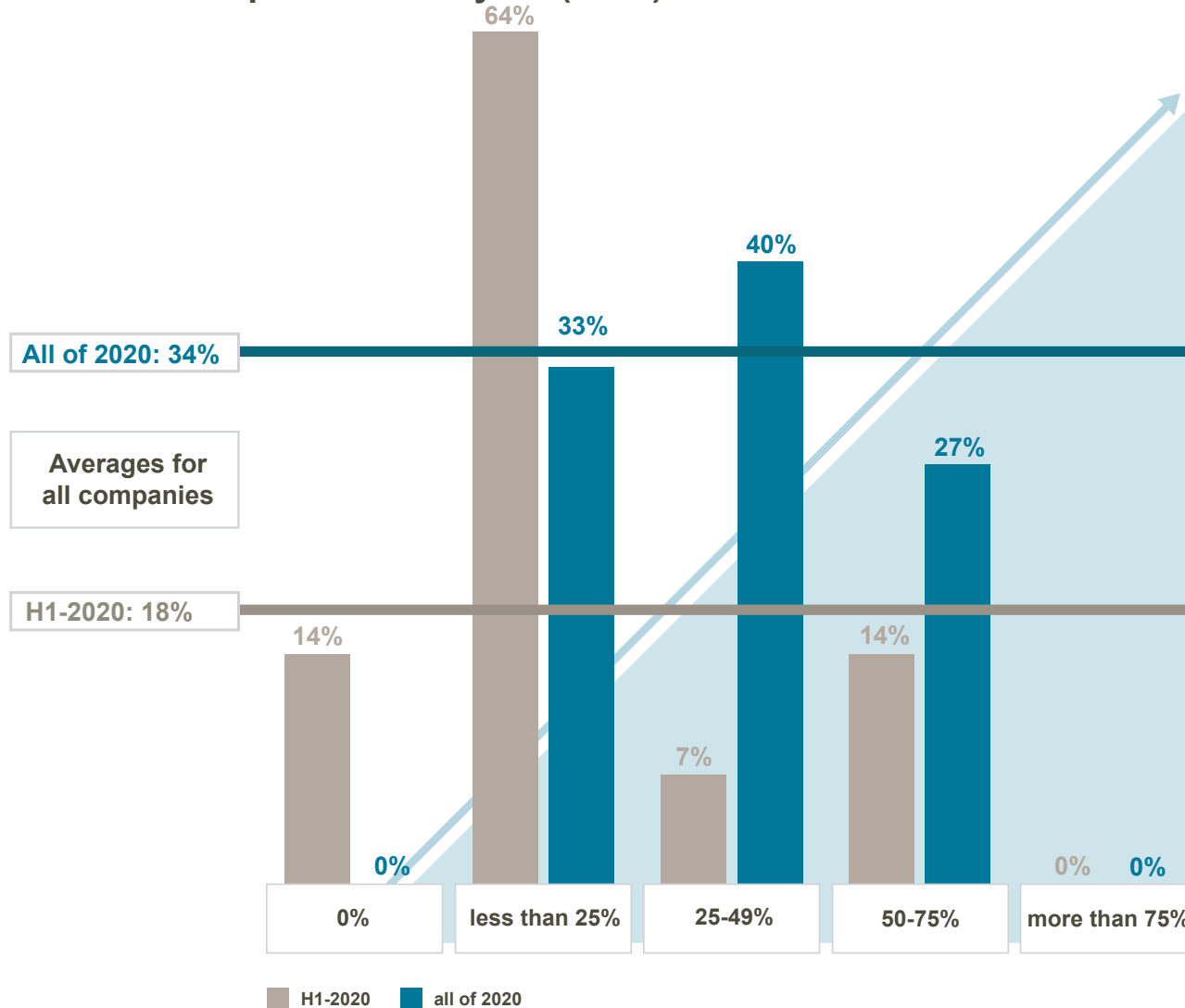


When do you believe exhibitions will open again in your city?

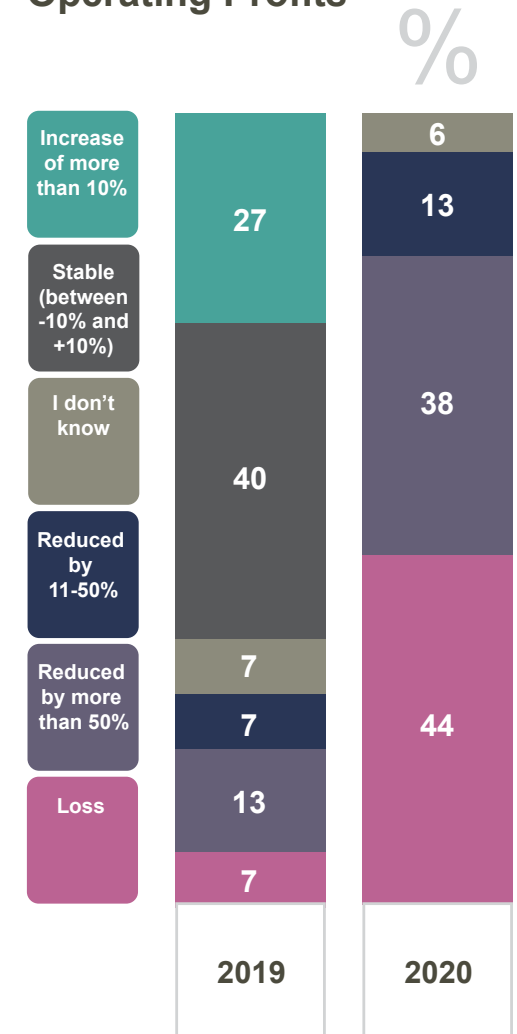




Revenue compared to last year (2019)

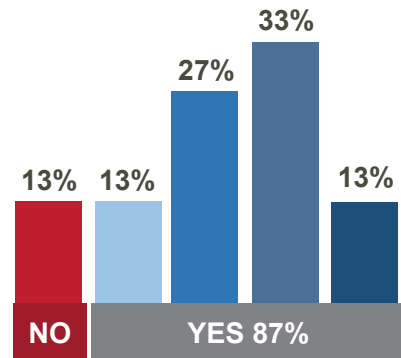


Operating Profits



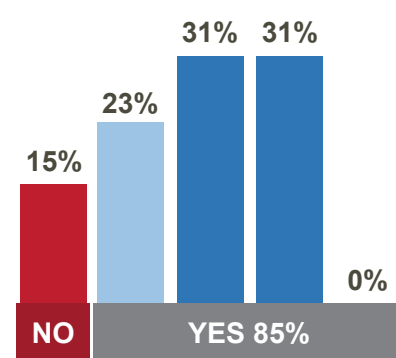


Did your company implement cost reductions?



- 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

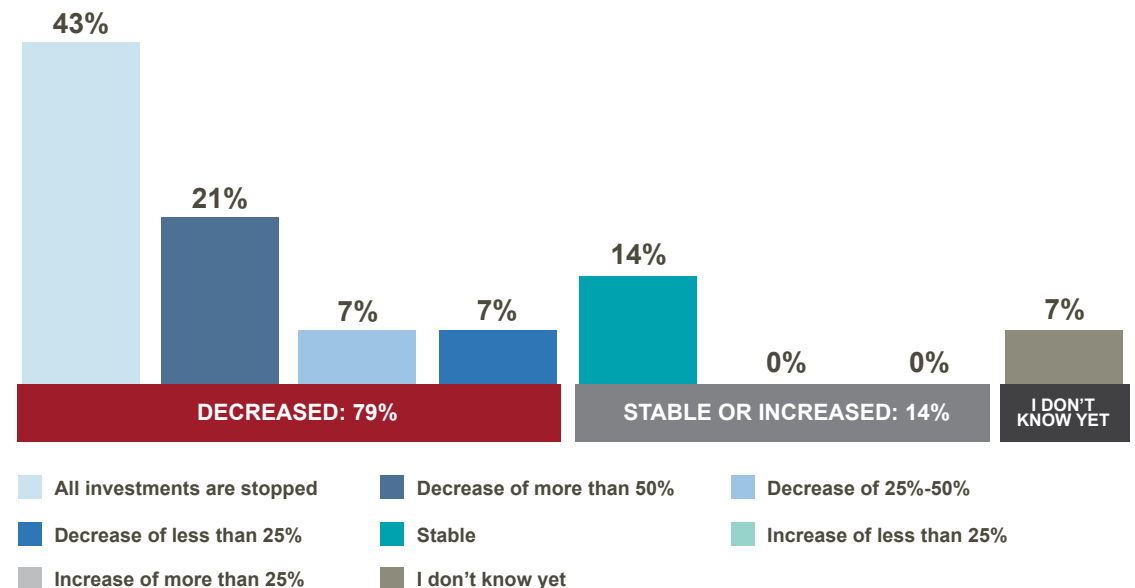
Did your company benefit from public financial support?



Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





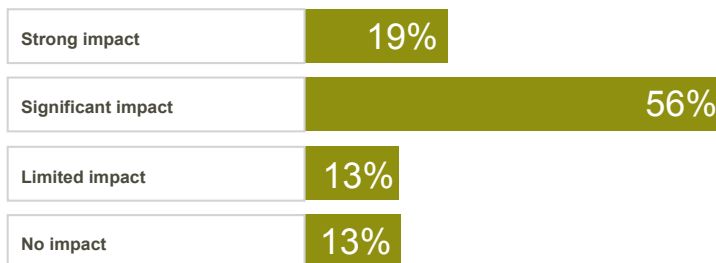
Digitalisation

How would you rate the transition of the exhibition industry?

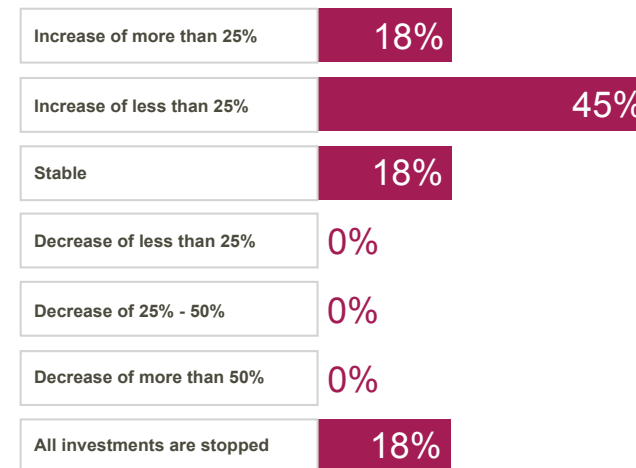
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



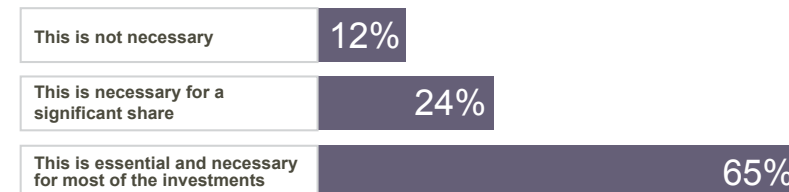
To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





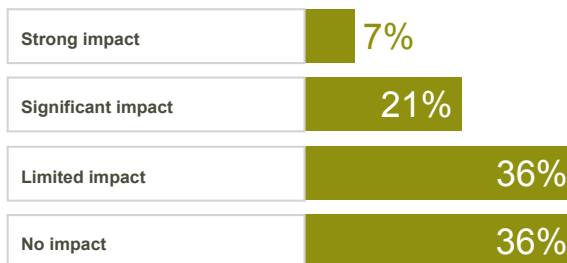
Diversity

How would you rate the transition of the exhibition industry?

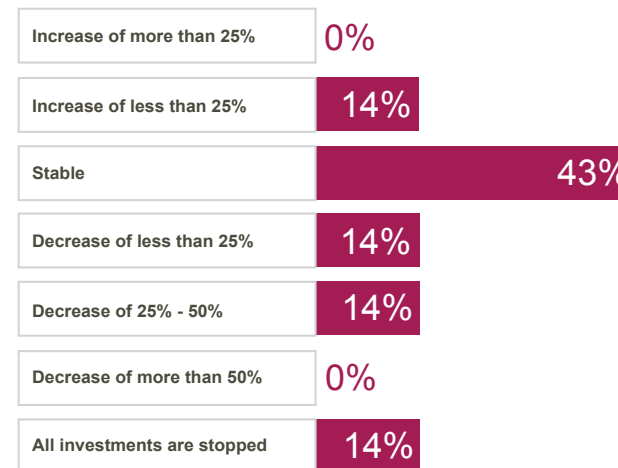
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



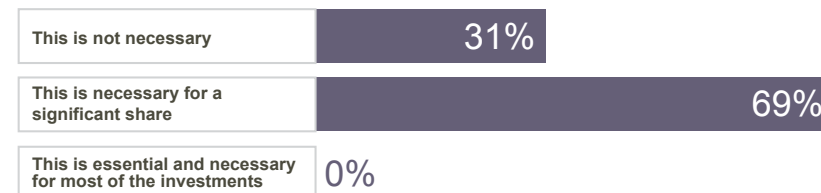
To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





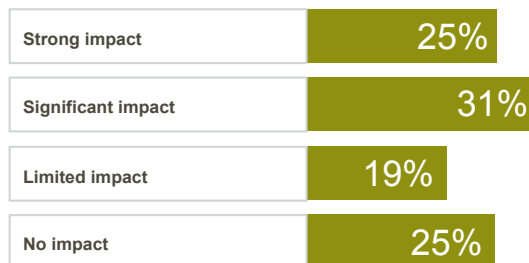
Sustainability

How would you rate the transition of the exhibition industry?

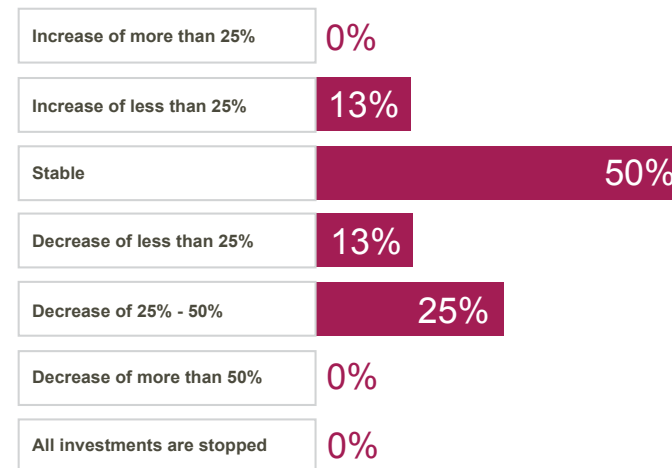
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



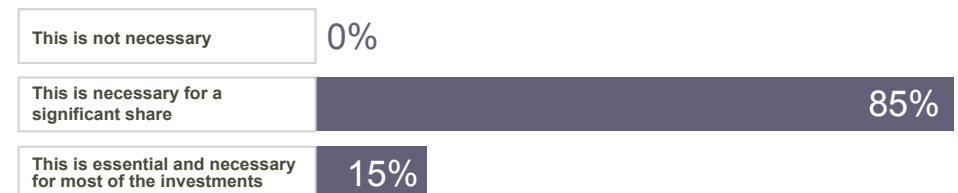
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

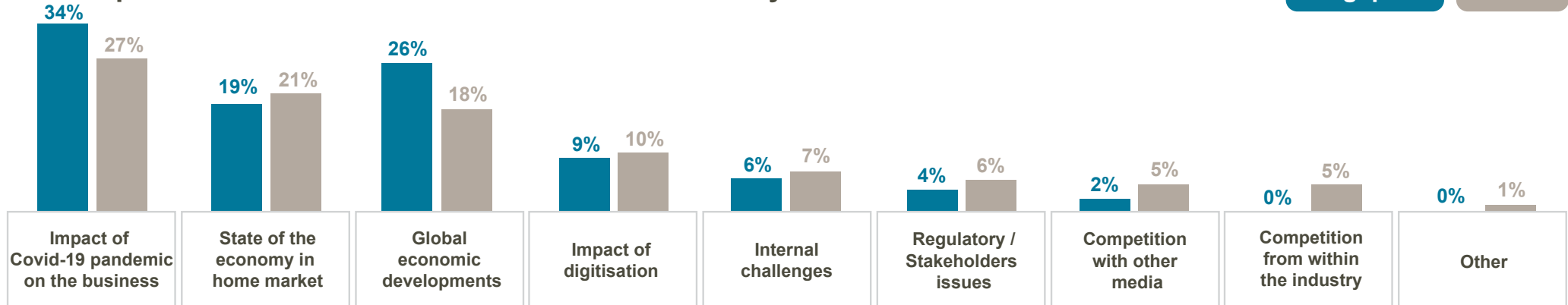


Detailed results for Singapore



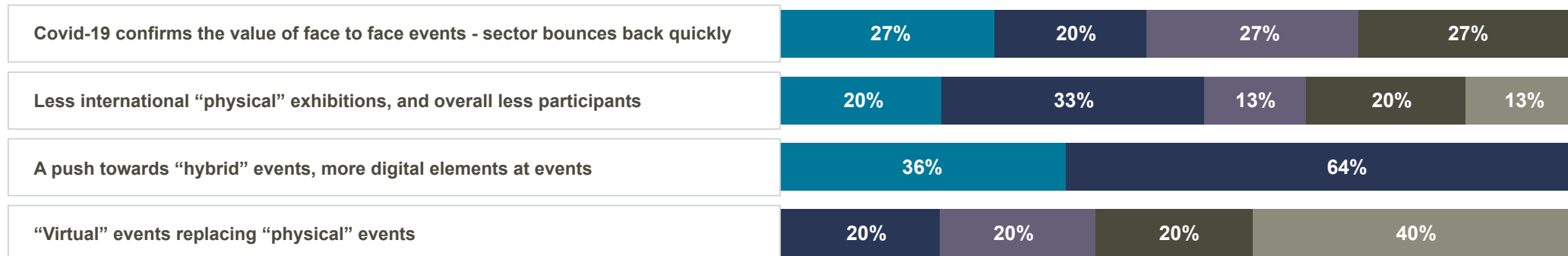
Most important business issues in the exhibition industry

Singapore Global



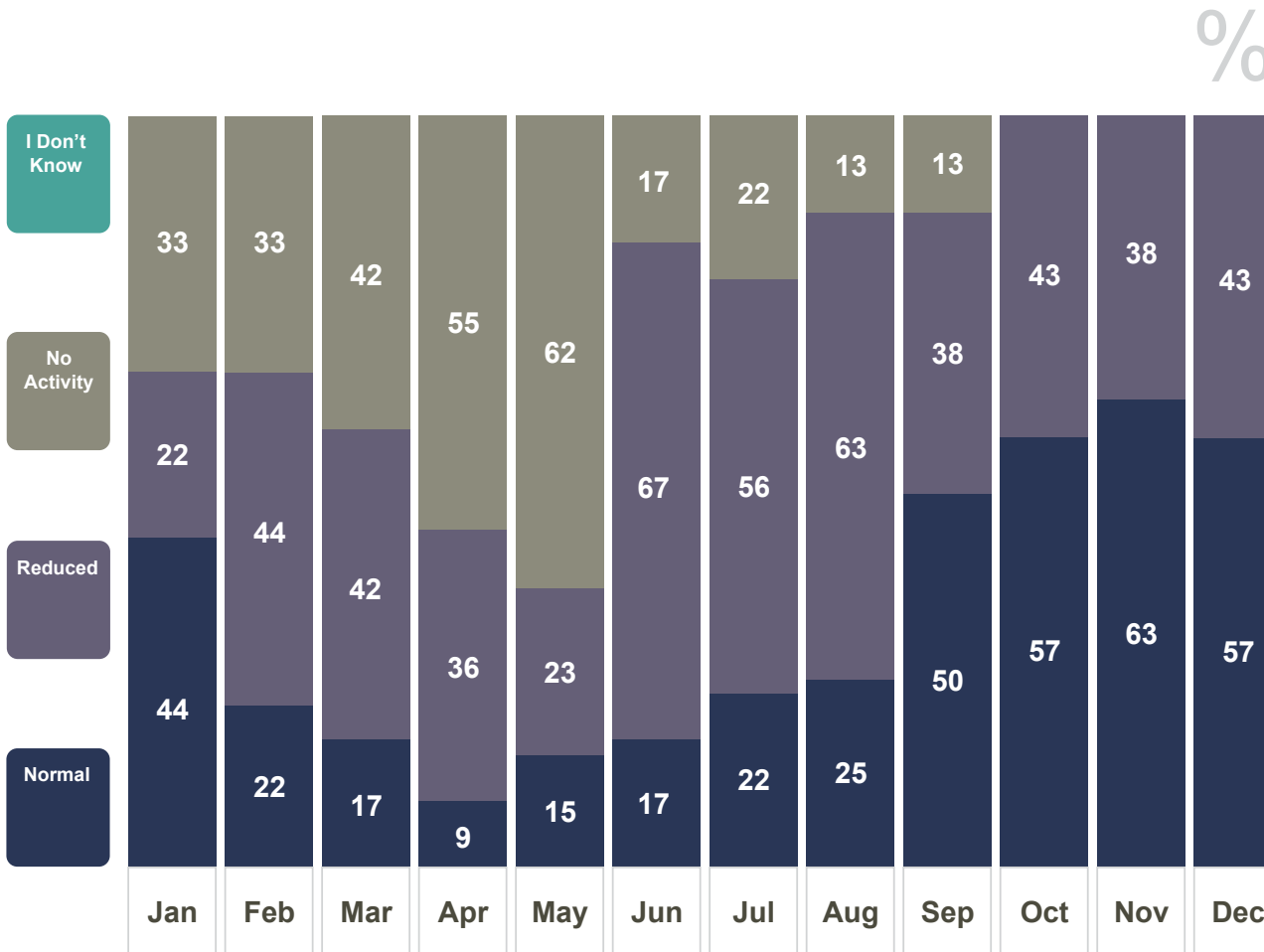
Format of exhibitions in the coming years

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

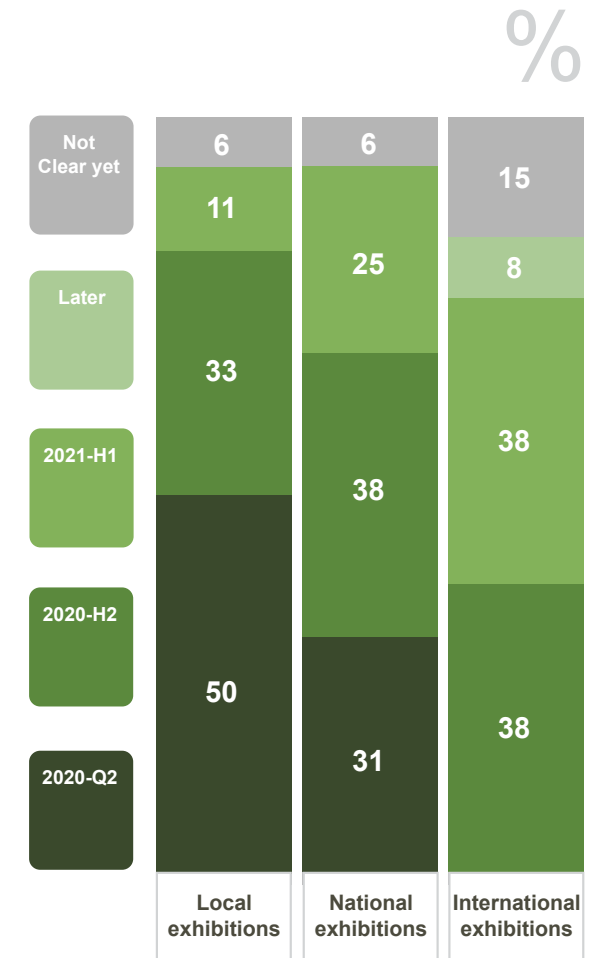




Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

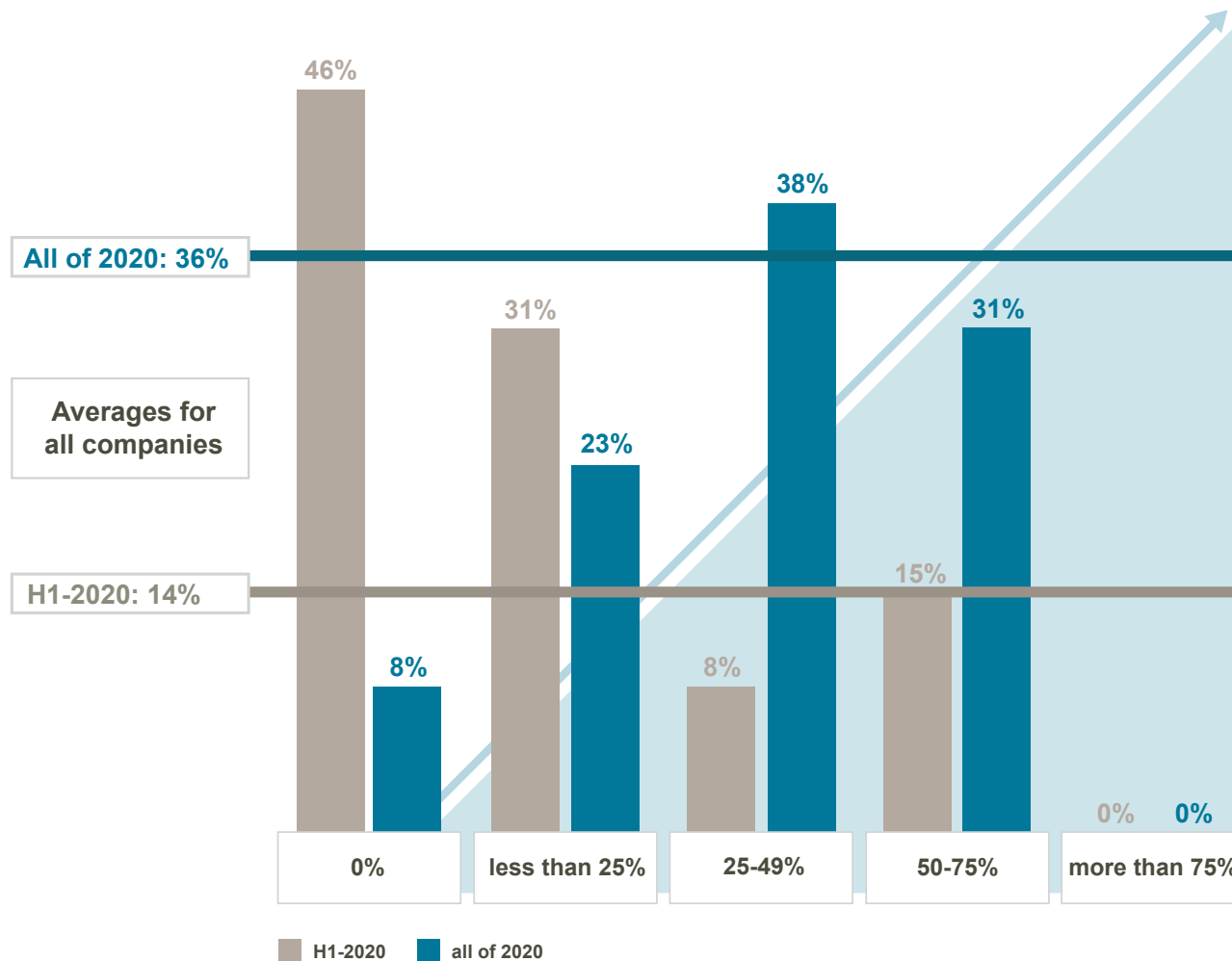


When do you believe exhibitions will open again in your city?

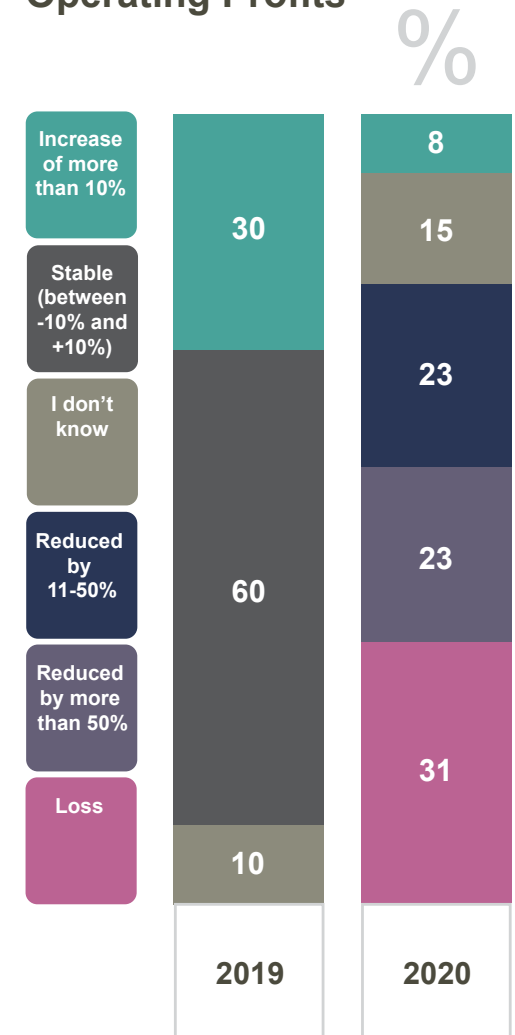




Revenue compared to last year (2019)



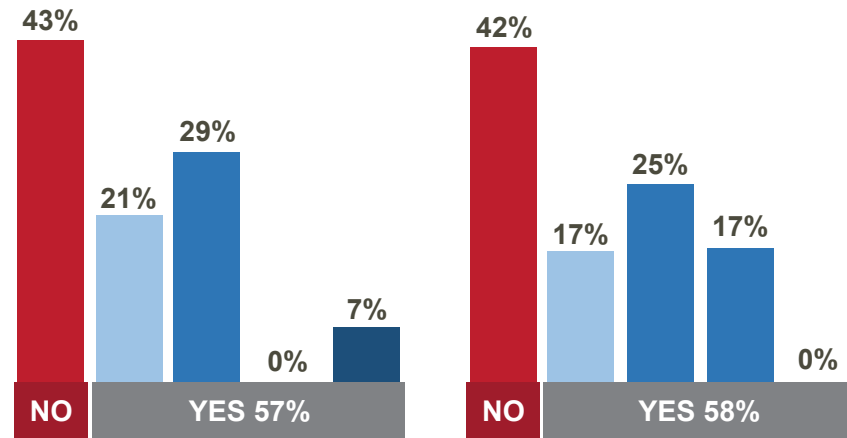
Operating Profits



Detailed results for South Korea

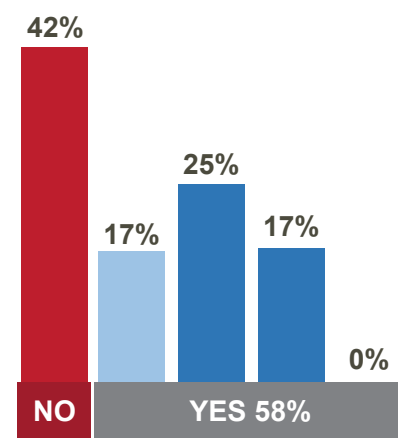


Did your company implement cost reductions?

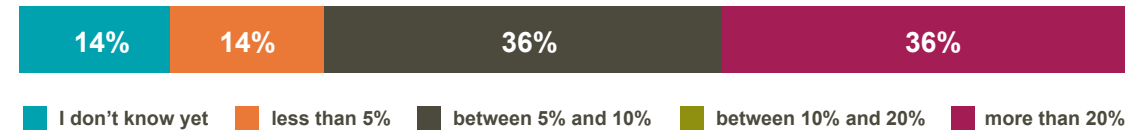


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

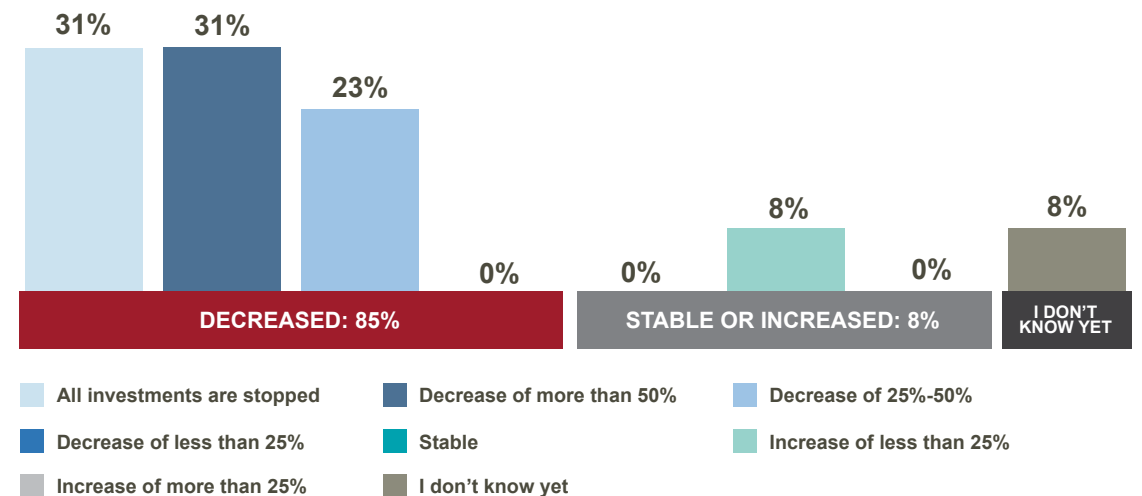
Did your company benefit from public financial support?

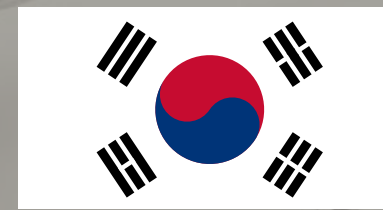


Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





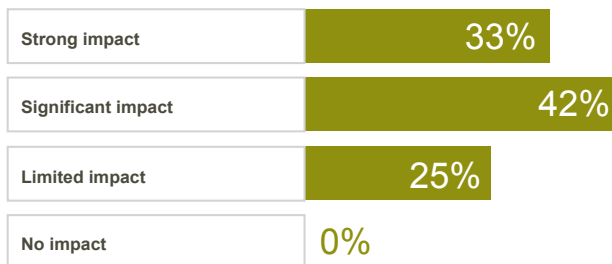
Digitalisation

How would you rate the transition of the exhibition industry?

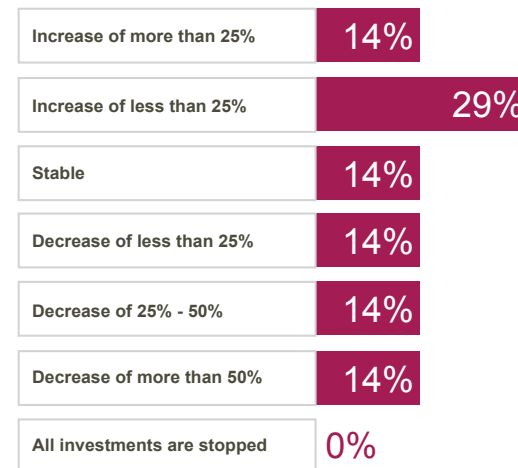
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



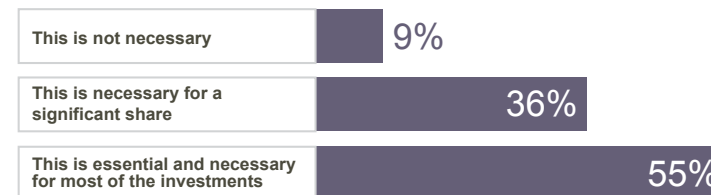
To what extent has Covid-19 impacted your company activities in digitalisation?

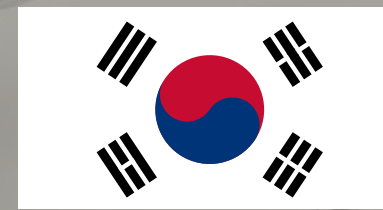


How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





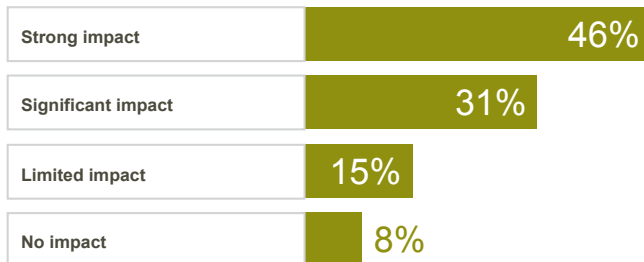
Diversity

How would you rate the transition of the exhibition industry?

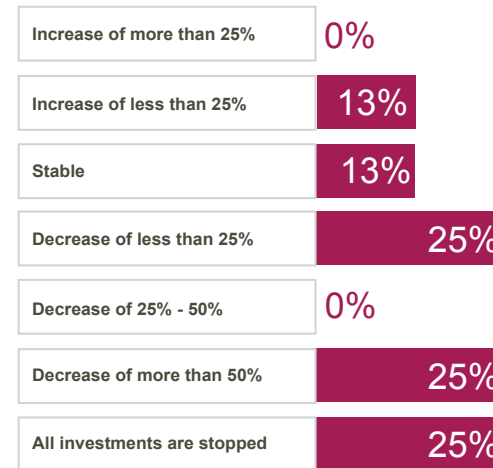
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



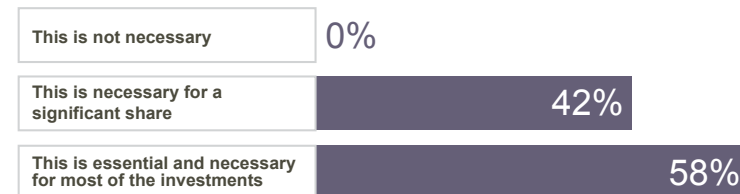
To what extent has Covid-19 impacted your company activities in diversity?

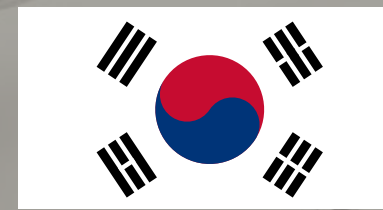


How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





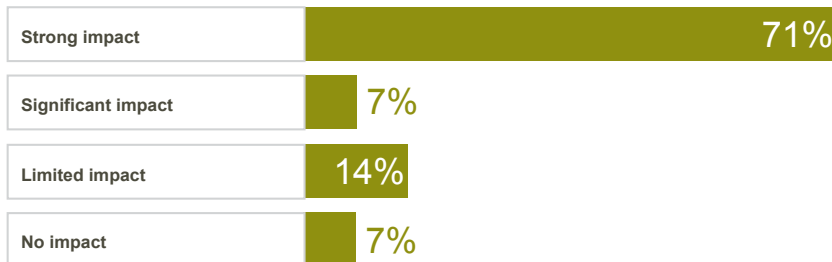
Sustainability

How would you rate the transition of the exhibition industry?

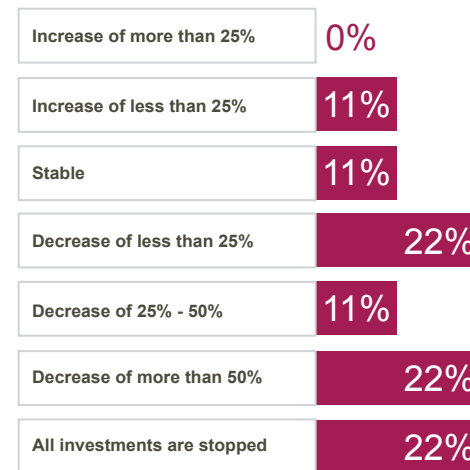
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



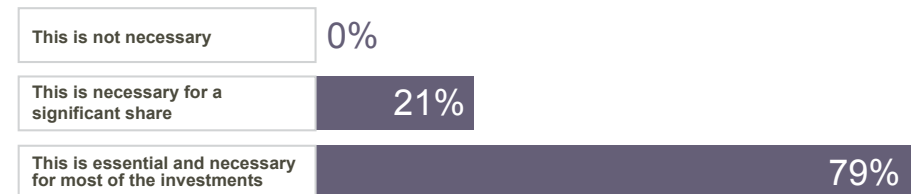
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



To what degree would you welcome some public investments in sustainability?

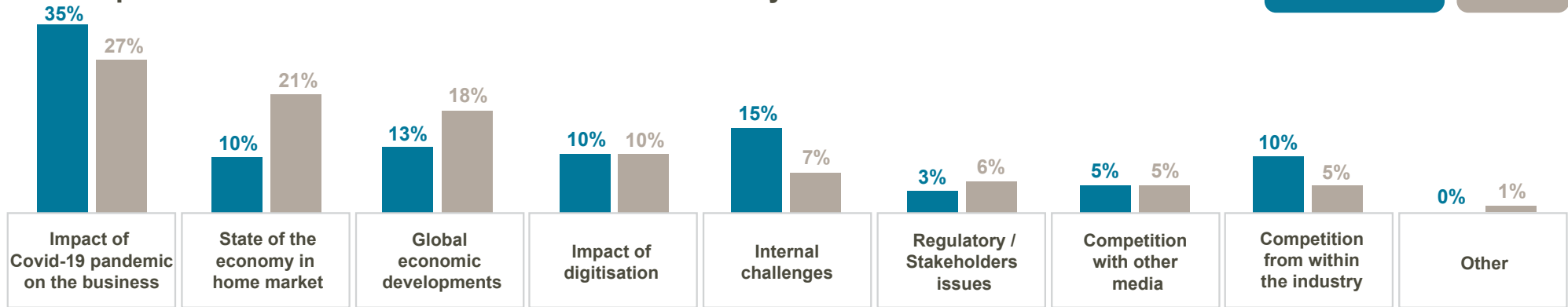


Detailed results for South Korea



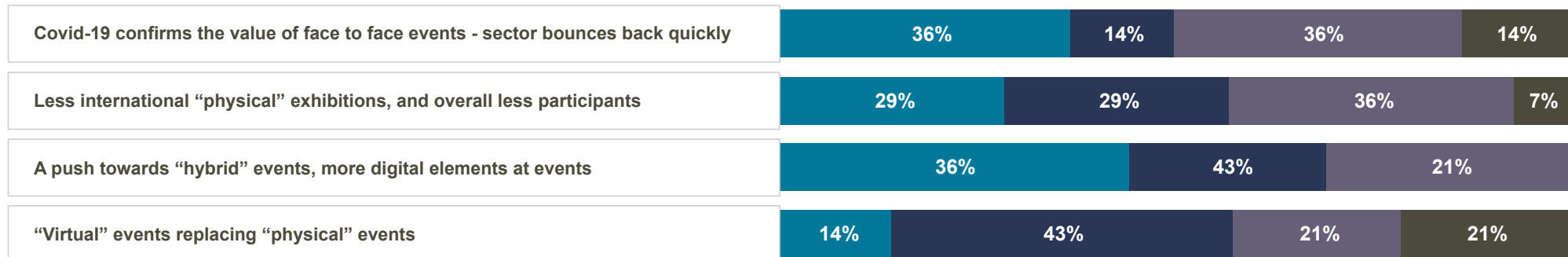
Most important business issues in the exhibition industry

South Korea Global

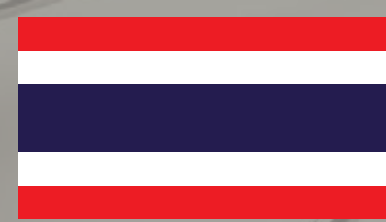


Format of exhibitions in the coming years

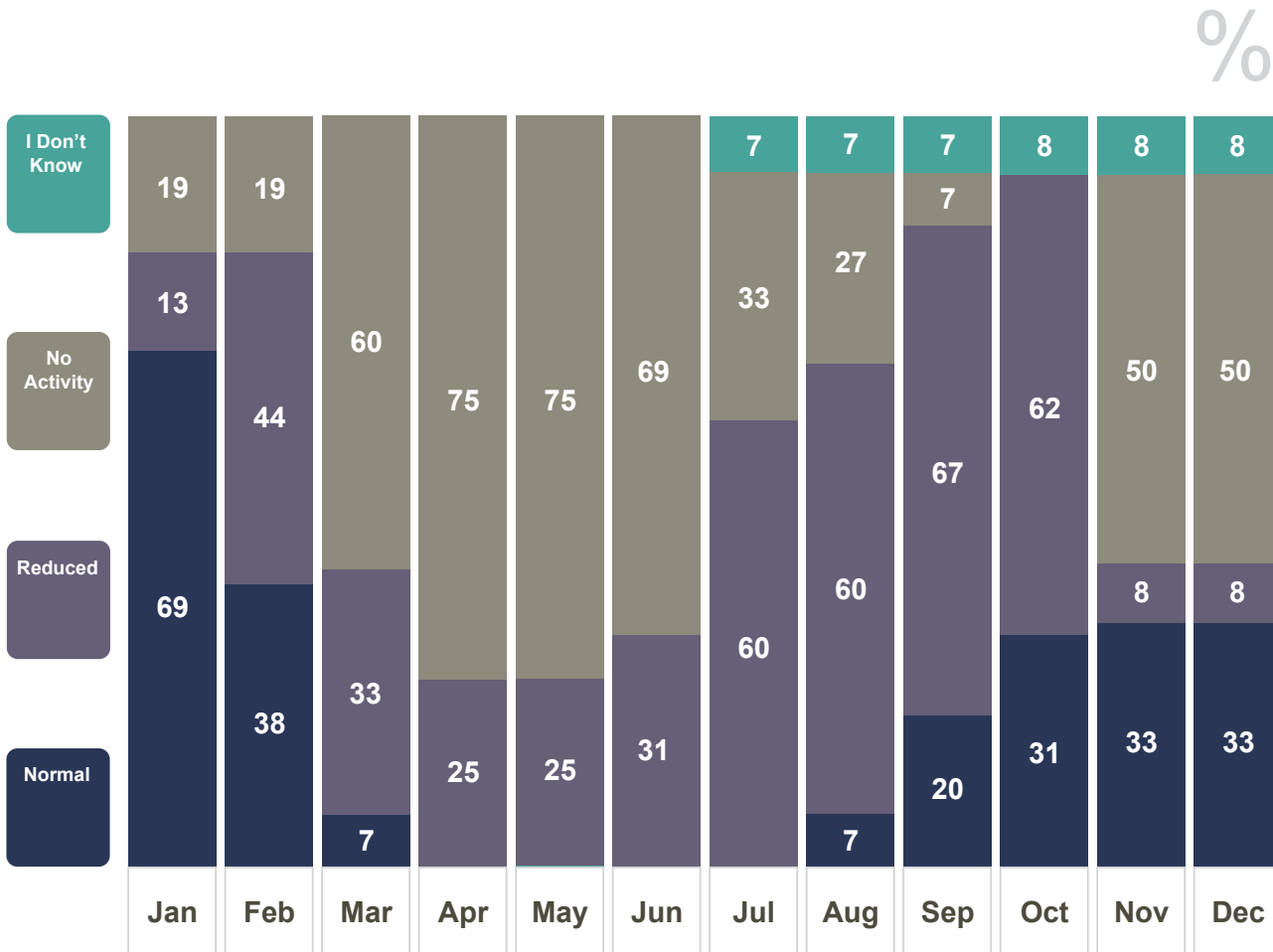
Yes, for sure Most probably Not sure Not sure at all Definitely not



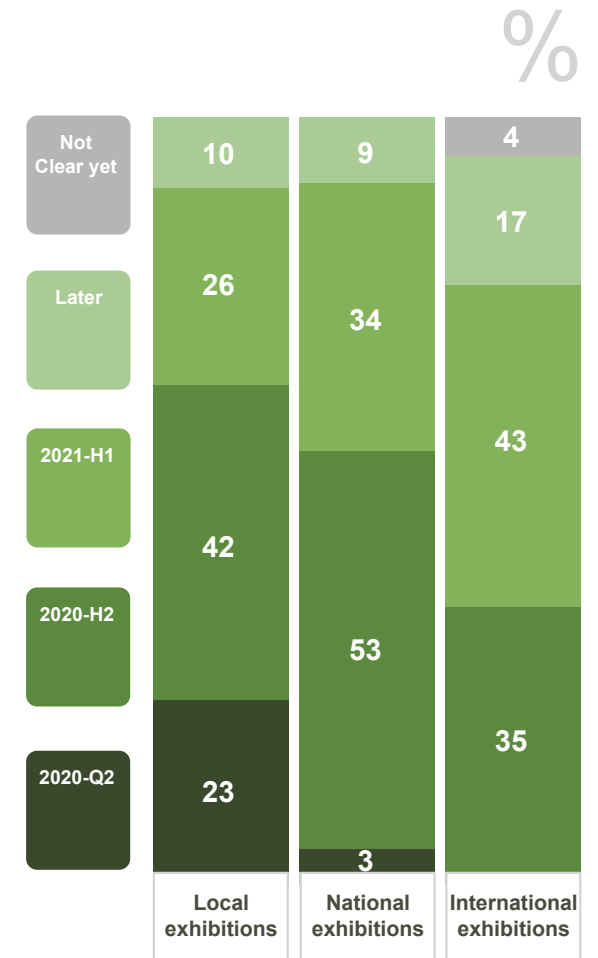
Detailed results for Thailand

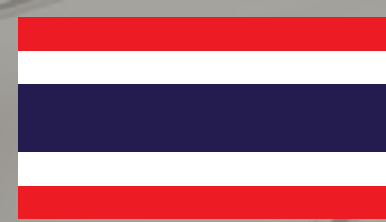


Situation of industry operations for the 1st half of 2020 and current predictions for the 2nd half of 2020

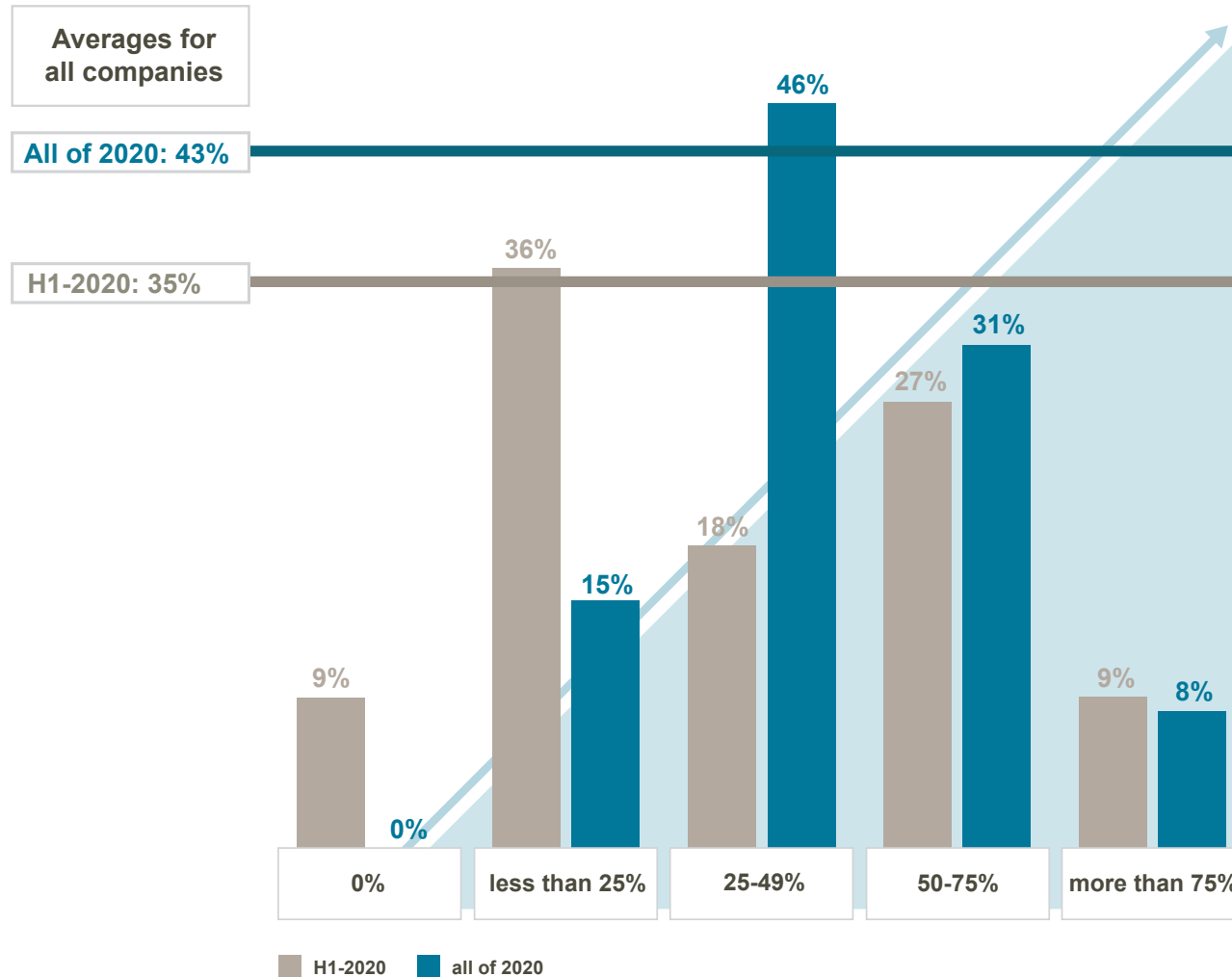


When do you believe exhibitions will open again in your city?

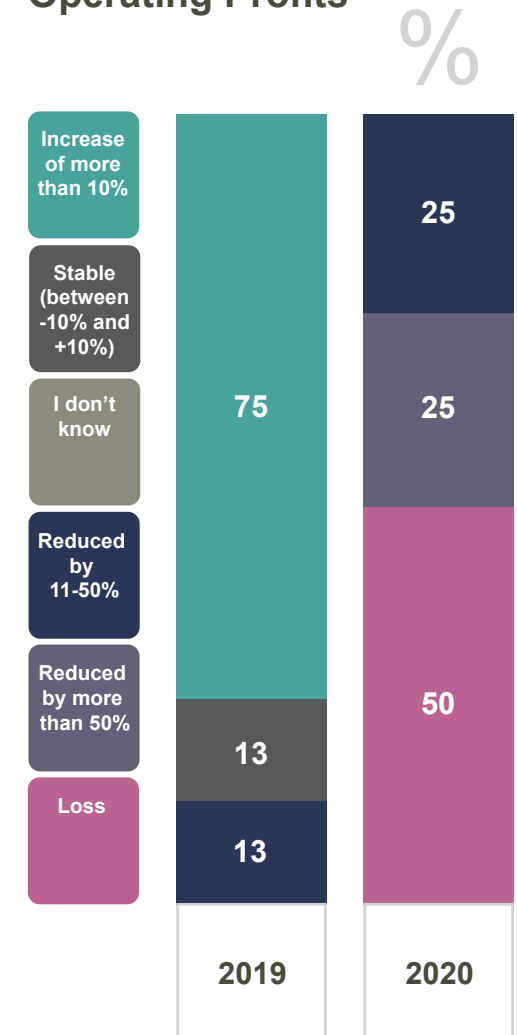




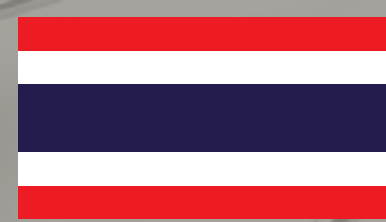
Revenue compared to last year (2019)



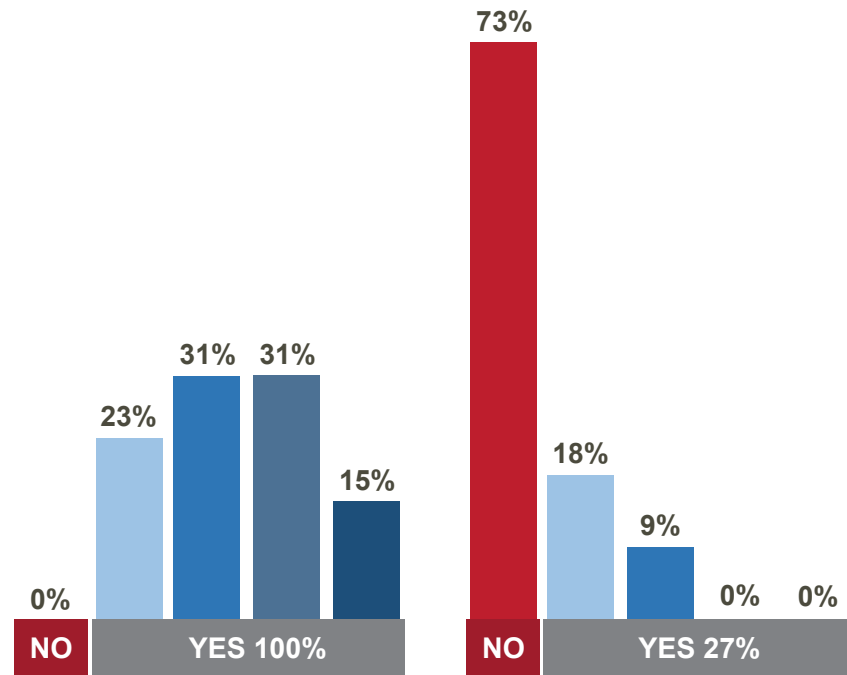
Operating Profits



Detailed results for Thailand

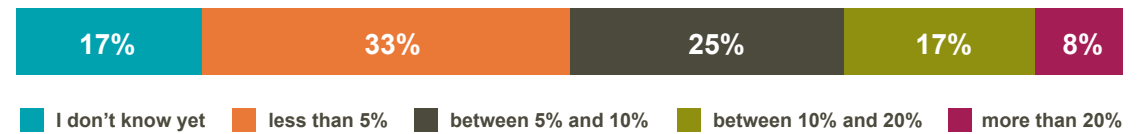


Did your company implement cost reductions?

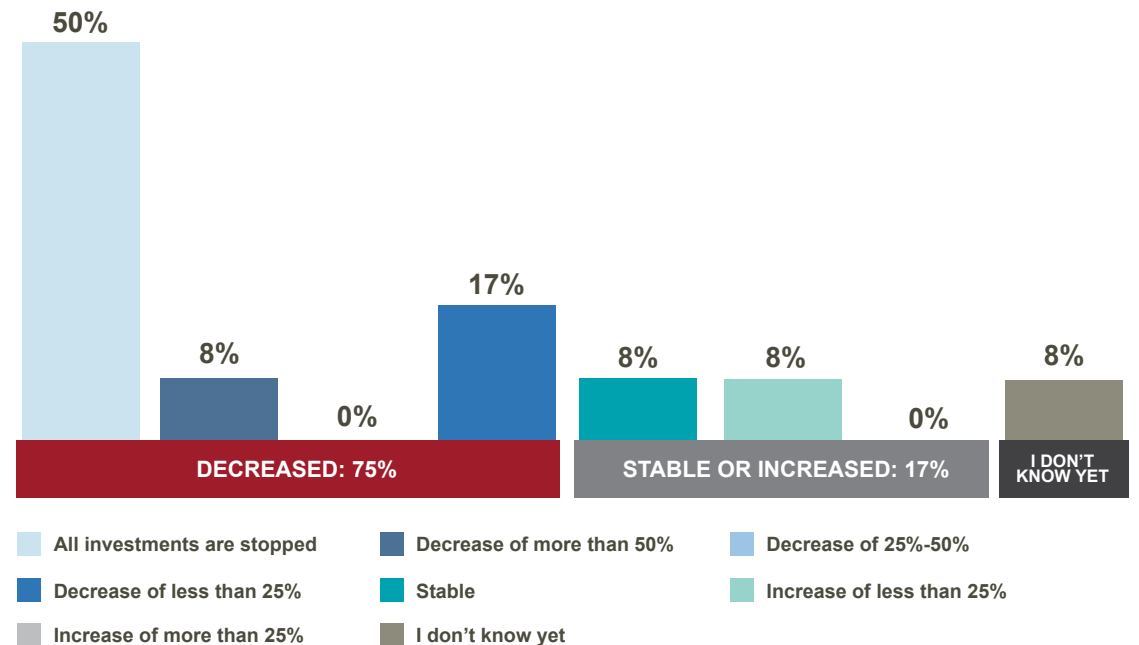


- No
- Yes, for less than 10% of our 2019 overall costs
- Yes, for between 10% and 25% of our 2019 overall costs
- Yes, for between 25% and 50% of our 2019 overall costs
- Yes, for more than 50% of our 2019 overall costs

Estimated short-term investments necessary for complying with Covid-19 (likely) protocols & guidelines, as a % of current overall costs?



How is the Covid-19 crisis affecting the level of investment of your company in 2020?





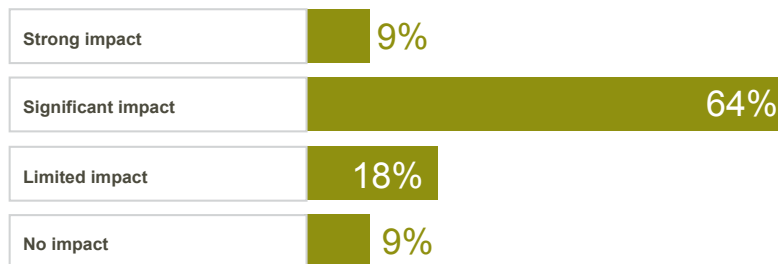
Digitalisation

How would you rate the transition of the exhibition industry?

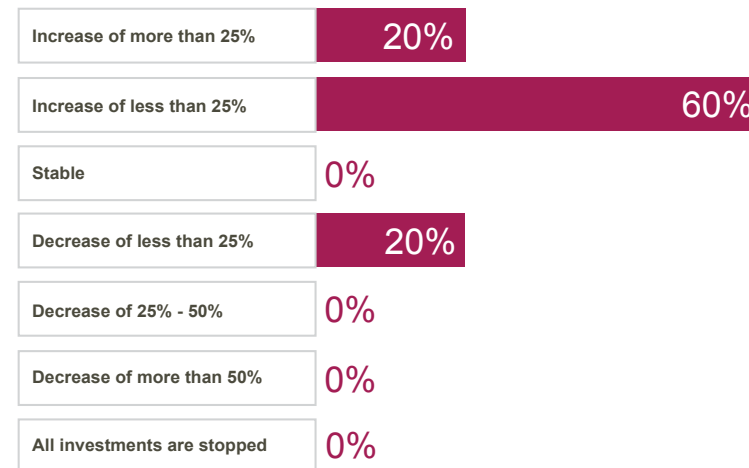
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in digitalisation?



How is the Covid-19 crisis affecting the level of investment of your company in digitalisation in 2020?



To what degree would you welcome some public investments in digitalisation?





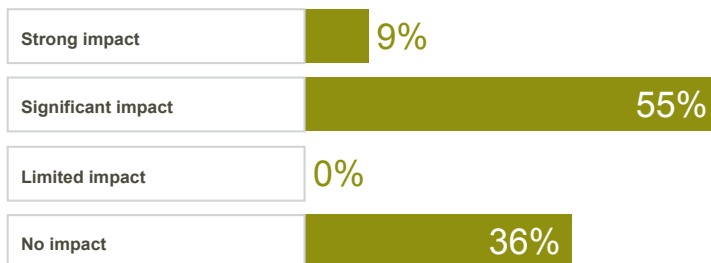
Diversity

How would you rate the transition of the exhibition industry?

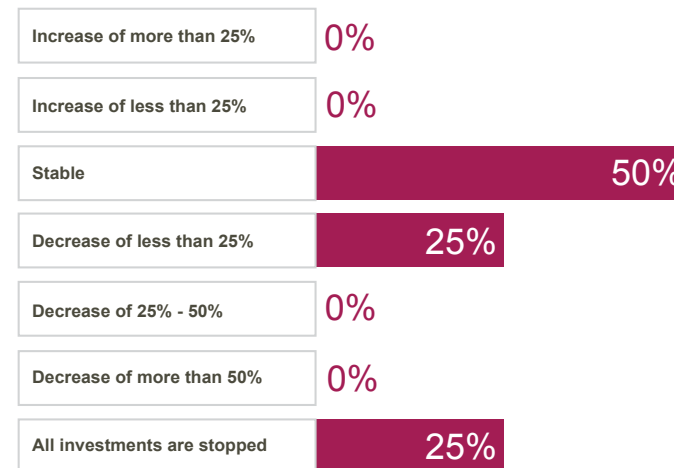
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



To what extent has Covid-19 impacted your company activities in diversity?



How is the Covid-19 crisis affecting the level of investment of your company in diversity in 2020?



To what degree would you welcome some public investments in diversity?





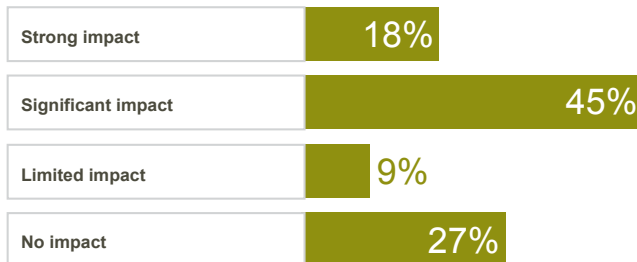
Sustainability

How would you rate the transition of the exhibition industry?

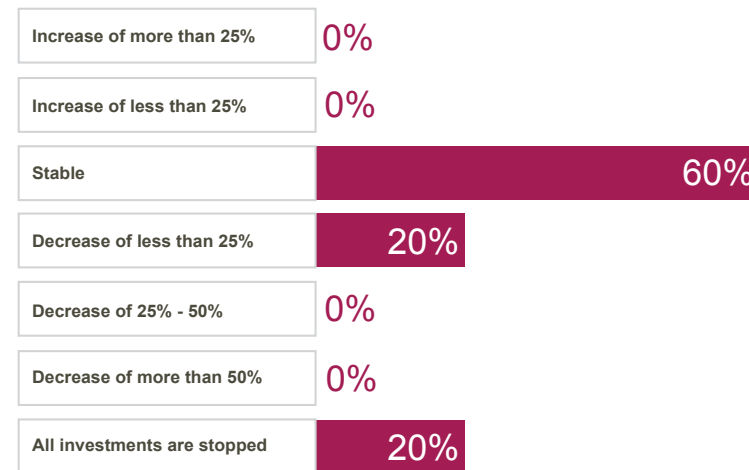
(scale from 1 to 5, with 1 'only starting the transition' to 5 'very advanced')



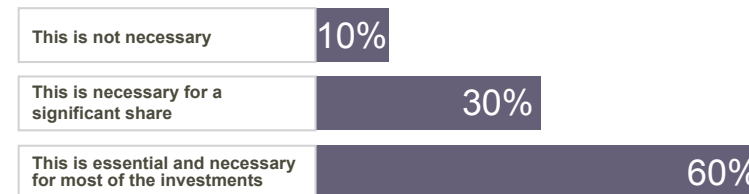
To what extent has Covid-19 impacted your company activities in sustainability?



How is the Covid-19 crisis affecting the level of investment of your company in sustainability in 2020?



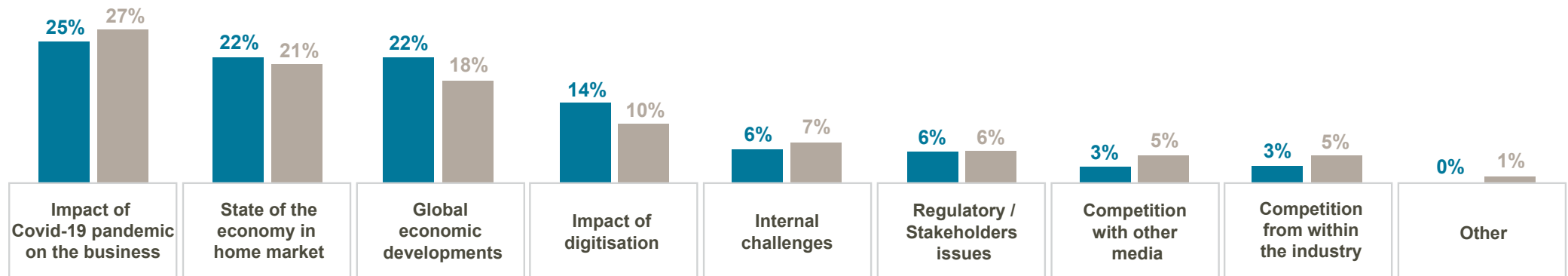
To what degree would you welcome some public investments in sustainability?





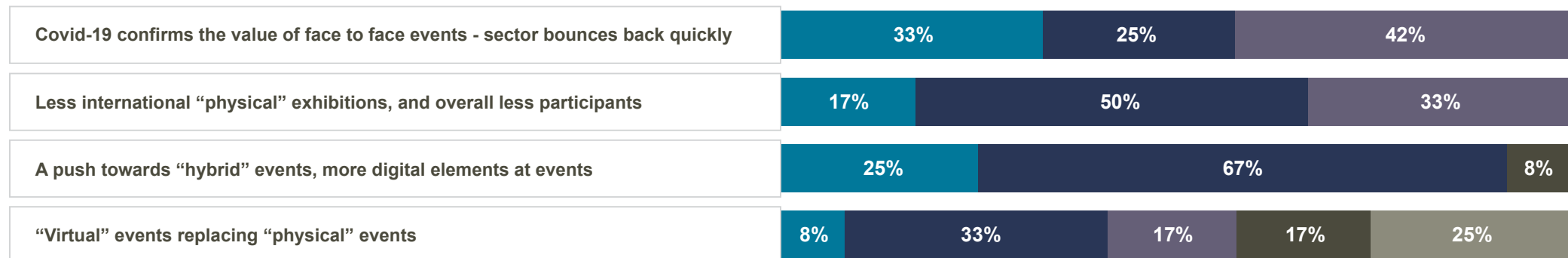
Most important business issues in the exhibition industry

Thailand Global



Format of exhibitions in the coming years

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



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

This 25th survey was concluded in June 2020 and includes data from a record 459 companies in 62 countries and regions. The report delivers outlooks and analysis for 20 countries and regions. In addition, it analyses five aggregated regional zones.

Results highlights the severe impact of the COVID-19 pandemic on the exhibition industry worldwide.

Globally, 85% of companies declared their overall level of activity was “normal” in January. This quickly dropped to 15% in March, to reach between 5% and 6% in April, May and June. For both April and May, 73% of companies worldwide declared “no activity”.

With a majority of companies expecting “local” and “national” **exhibitions to open again** during the second half of 2020, the level of activity is expected to slowly increase, and two companies out of three project at least a “reduced” level of activity in the last quarter of 2020. In all regions, a majority of companies believe that exhibitions with an international scope will not open until 2021.

Globally, **revenues** for the first half of 2020 dropped by two thirds on average, compared with the same period last year. Looking at 2020 as a whole, it is currently expected that globally revenues will represent only 39% of those of 2019.

In terms of **profits**, a strong level of performance was reached in 2019, with 45% of companies declaring an increase of more than 10% for 2019 when compared to 2018. The sharp drop in revenues that occurred in 2020 has led to a loss for 39% of companies, and only 7% of companies currently expect a stable or increased profit for 2020.

44% of companies that participated in the research have stopped all of their **investments**. At the same time, 50% of companies are increasing their investments in digitalisation programmes. By comparison, investments have decreased or been stopped for 55% of companies in programmes related to diversity, and 54% in those related to sustainability.

The survey also tackles **possible driving trends for the format of exhibitions in the coming years**. Global results indicate that 57% are confident that “COVID-19 confirms the value of face-to-face events”, anticipating that the sector will bounce back quickly, whereas 31% are “not sure” and 12% are “not sure at all” or “disagree completely”.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!

THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN DECEMBER 2020 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 459 (in 62 countries/regions)

North America	55	Europe	123	Middle East	21
Canada	5	Albania	1	Lebanon	1
Mexico	26	Belgium	3	Oman	2
USA	24	Bulgaria	1	Saudi Arabia	5
		Croatia	2	United Arab Emirates	13
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Central & South America	66	Finland	1	Asia – Pacific	172
Argentina	17	France	2	Australia	27
Bolivia	1	Georgia	1	China	35
Brazil	15	Germany	22	India	20
Chile	3	Greece	3	Indonesia	13
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Costa Rica	4	Italy	14	Malaysia	5
Ecuador	3	Netherlands	3	Myanmar	1
Guatemala	3	Poland	3	New Zealand	1
Honduras	1	Portugal	3	Pakistan	4
Peru	2	Romania	1	Philippines	1
		Russian Federation	18	Singapore	16
Africa	22	Serbia	1	South Korea	14
Kenya	1	Slovenia	1	Sri Lanka	1
Rwanda	1	Spain	14	Thailand	15
South Africa	20	Sweden	3	Uzbekistan	1
		Switzerland	1	Vietnam	2
		Turkey	4		
		Ukraine	2		
		United Kingdom	16		

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