



IFES SURVEY ON THE IMPACT OF COVID-19 ON THE EXHIBITION + EVENT SERVICE PROVIDER INDUSTRY



Impact of CoVid 19 on the Exhibition + Event service provider industry

We've conducted this survey to collect data about current topics like impacts and challenges for IFES member companies and the future of the live event industry.

This overview shows best practice and the current impact of CoVid 19 from different parts around the world.

In total, **86 participants** filled out the survey, all of them are IFES members. The survey was run from 11 – 25 September 2020.



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The results of the survey are structured into two main parts: 1) a general global overview and 2) the results per broken down into continents and countries.

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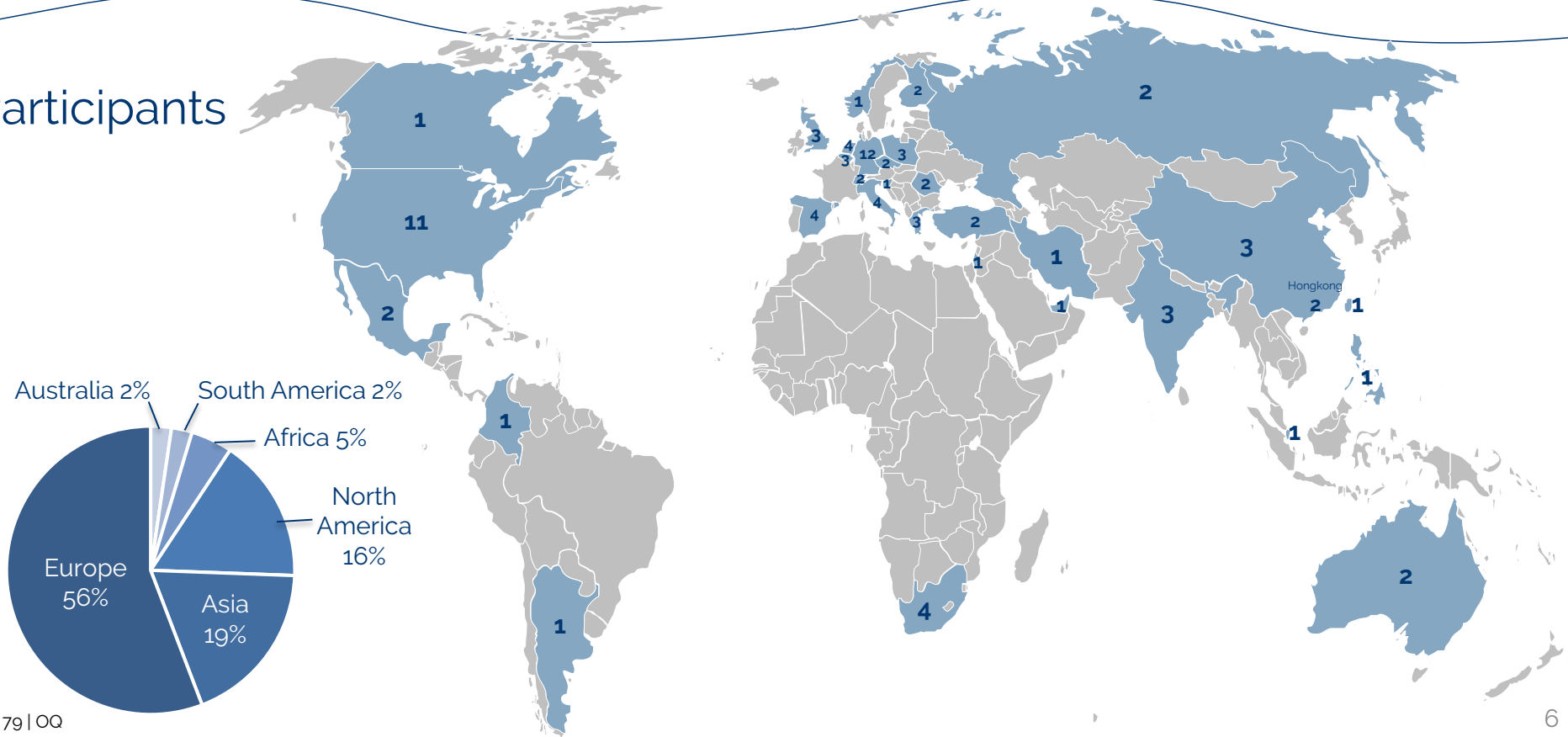
Symbol	Meaning
n	Number of participants that answered the question
OQ	Open Question – The participants answered this question in a text format
MC SA	Multiple Choice Single Answer Multiple answer possibilities were provided, participants selected only one
MC MA	Multiple Choice Multiple Answers Multiple answer possibilities were provided, participants have selected one or more applicable answers

A decorative graphic consisting of several thin, white, wavy lines that flow horizontally across the upper portion of the slide, creating a sense of movement and depth.

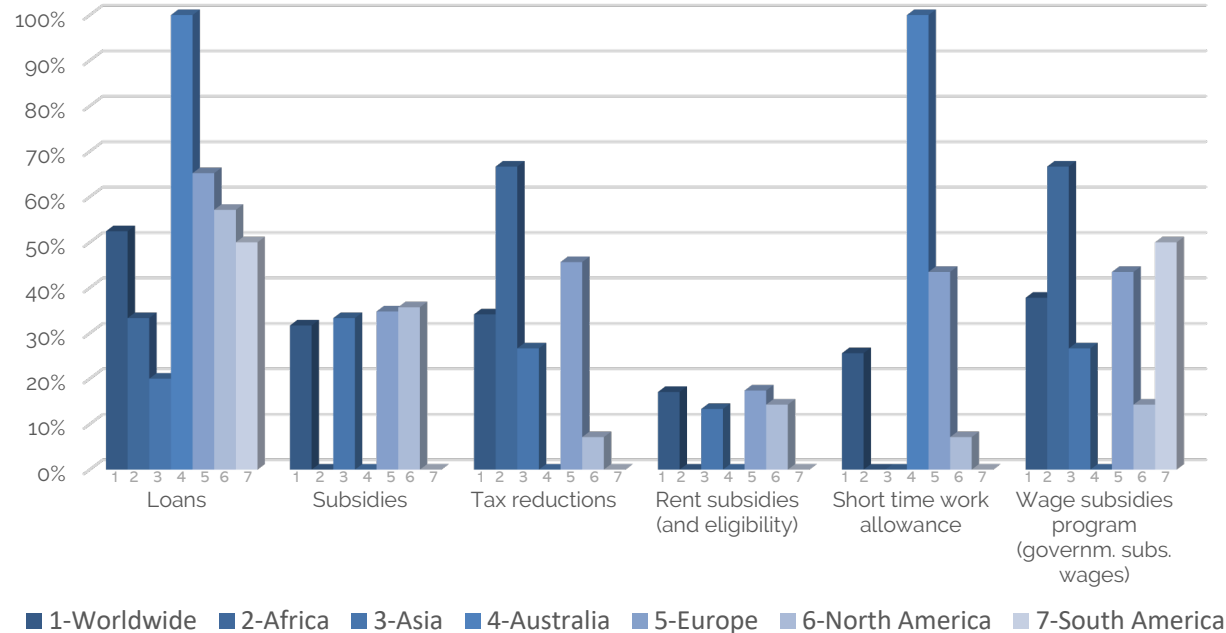
Global Overview



Participants



Governmental support



This graphic shows the various support, the live industry receives from the governments in their countries.

The percentage is based on the proportion of participants, relative to the total number per continent, who selected this support as relevant.

The wage subsidy varies from 10-80% and is limited to a certain period of time.

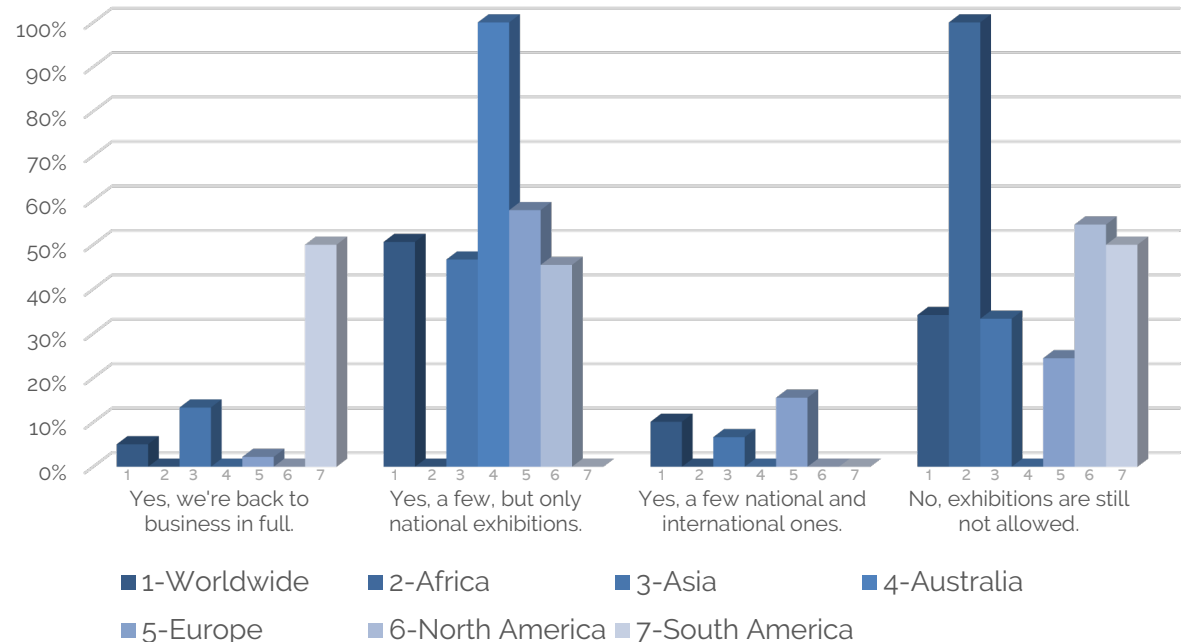
For more details, please check the Continent/ Country Section.

Are there any exhibitions taking place until the end of 2020?

After a break of several months, the exhibition market is slowly getting back into business with some smaller national shows. In few regions even with international exhibitions. This is mainly influenced due to travel restrictions.

Argentina and a part of the Chinese members claim to be back to business in full.

A majority of countries stated that no trade fairs may be held until the end of 2020.



Running Shows Australia, North & South America

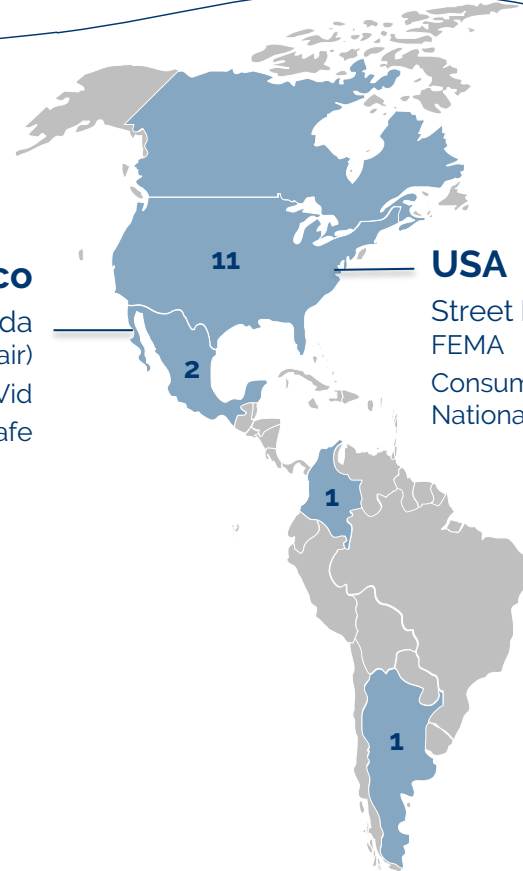


Australia

Wedding Expos
World of Drones

Mexico

IM Intermoda
FIL (Bookfair)
Expo Health-Sanity_CoVid
Expo Cafe



USA

Street Rod Nationals (NSRA)
FEMA
Consumer association (outdoor show)
National Auto Show

Running Shows Asia

Russia

Army-2020
City Pipe
DentalExpo
ECWAT
NO DIG
WasteTech

Iran

Smaller national
exhibitions

United Arab Emirates

Cityscape
Downtown Design Dubai

Singapore

Singapore International
Energy Week

China

Exhibitions are taking place as scheduled
(except some highly international ones)
Bauma
CBME
Food and Hotel China
SIAL

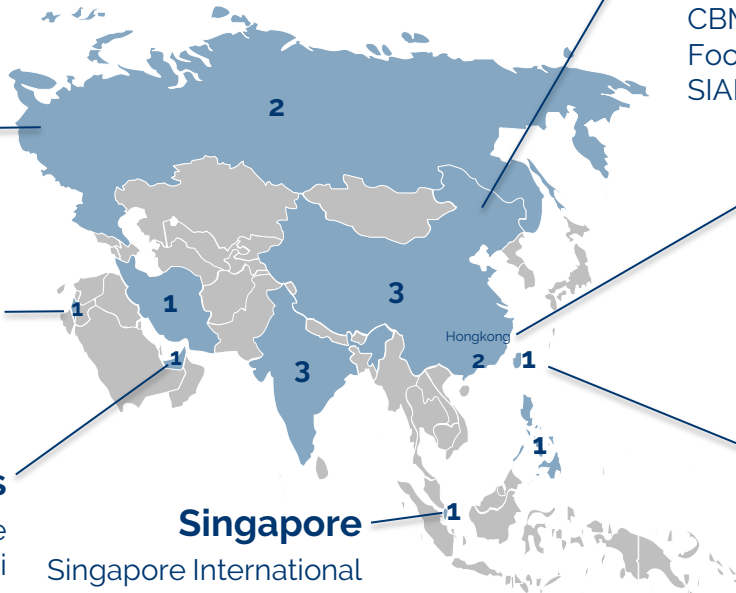
Hongkong

DesignInspire
HKTDC Book Fair
HKTDC Sports and HongKong
International Franchising Show
Leisure Expo
Retail Asia Conference & Expo
Smart Biz Expo

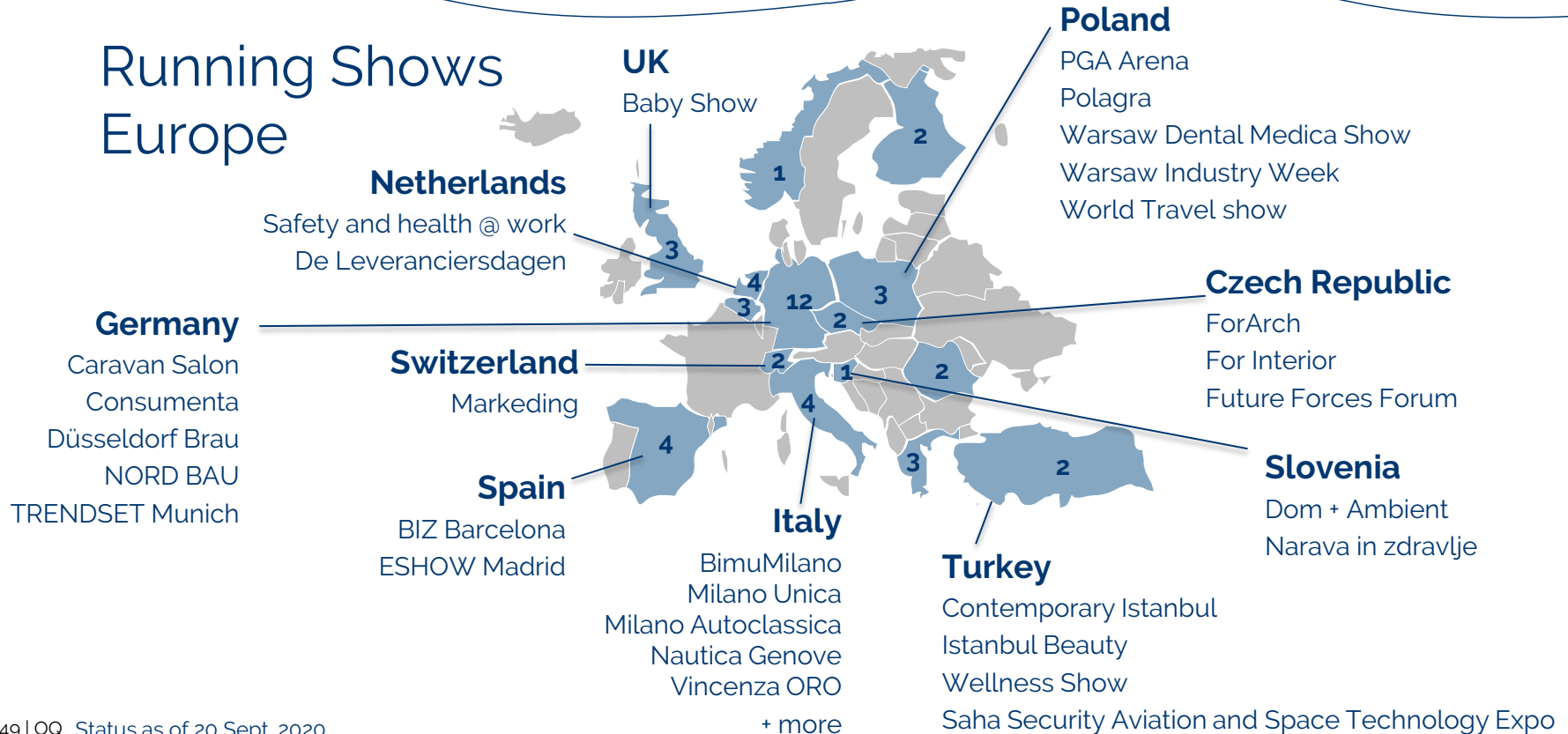
Taiwan

Super Leisure Lifestyle Show
Elder Care Asia
TASS Sustainable Supply

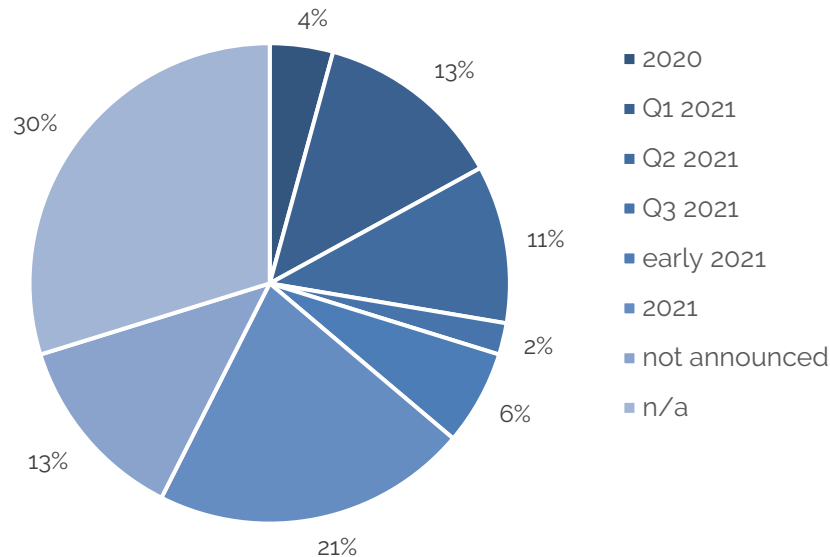
+ more



Running Shows Europe



In case exhibitions may still not take place, what is the currently planned reopening date?



The answers regarding the re-opening date reflect the current picture of uncertainty. Due to constantly fluctuating infection numbers and the associated restrictions, official orders are continually changing.

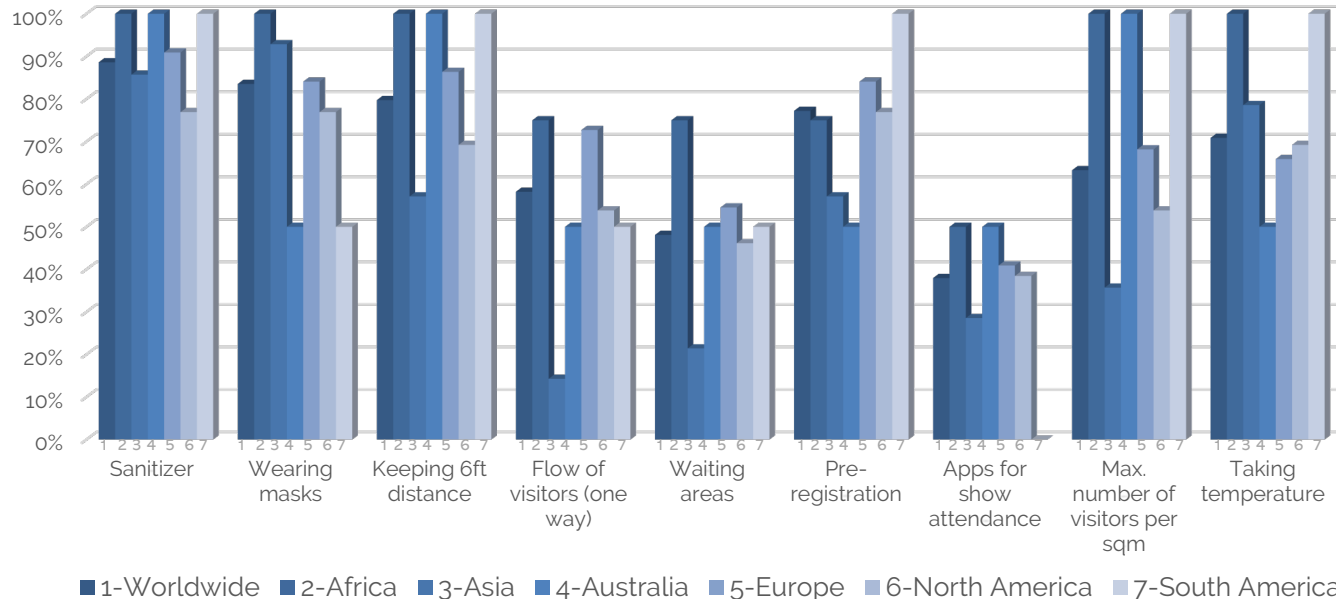
Worldwide, re-opening dates of the exhibition industry are planned from 2021, most likely in the first half of the year.

In many countries, no official dates have been announced yet and almost one third of the responders cannot make an estimation.

For further information on current status please check Ufi: https://www.ufi.org/wp-content/uploads/2020/10/Reopening_of_exhibitions_global_timeline.pdf



Measures of Hygiene concepts



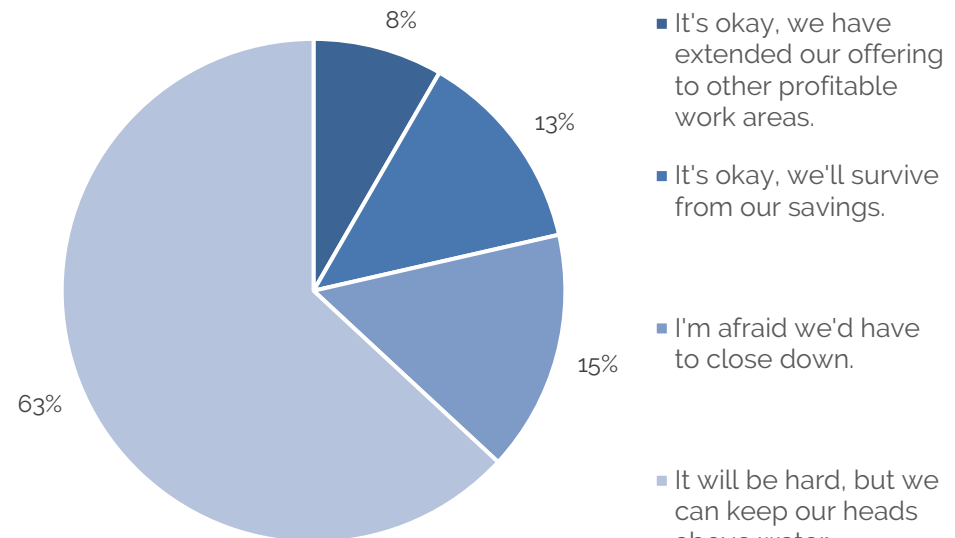
In order to re-open trade shows, a variety of hygiene measures have been implemented. Globally, over 75% of concepts include sanitizer, wearing masks, keeping a distance of 6-feet and pre-registration for event participation. These measures are closely followed by the management of visitor flows, e.g. one way, a limited number of participants per sqm and temperature measurement, which are part of over 50% of all concepts worldwide.

In case there will be no more business for the next 6 months, which statement applies best?

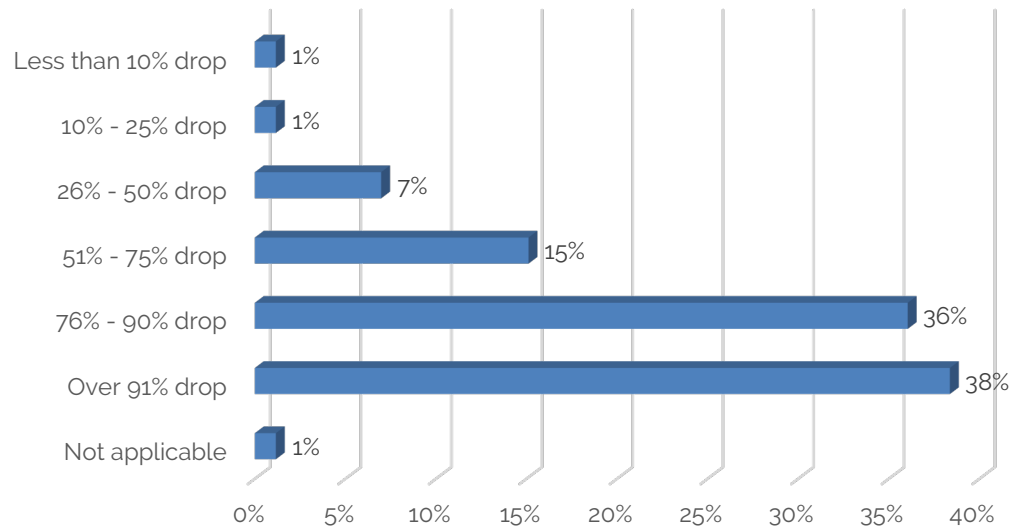
At the time of conducting this survey in September 2020, six months without business means a duration until March 2021. In total, this would mean a close down for one year.

Only a fraction of the members were able to increase their portfolio by alternative sources of income, like shopfitting, interior or CoVid related prevention products.

Three quarters of all participants would survive another six months period without business, either through savings or with difficulty. But only 8% managed to find another source of income. 15% would have to close down their business in such case.



From 1 March 2020 onwards, how much have your revenues dropped as a Y/Y comparison to 2019?



Since the beginning of CoVid, the exhibition industry has been locked down and lost all income possibilities overnight.

The slow return of national fairs and events is a step in the right direction. Nevertheless, around three-quarters of those surveyed suffer from a loss between 76% and over 91% of their revenue compared to the previous year.

Another 15% report a drop in revenue between 51-75%. The results underline the severity of the impact of the pandemic on the live event industry.

No participant selected the option „We have experienced an increase in sales Y/Y.“

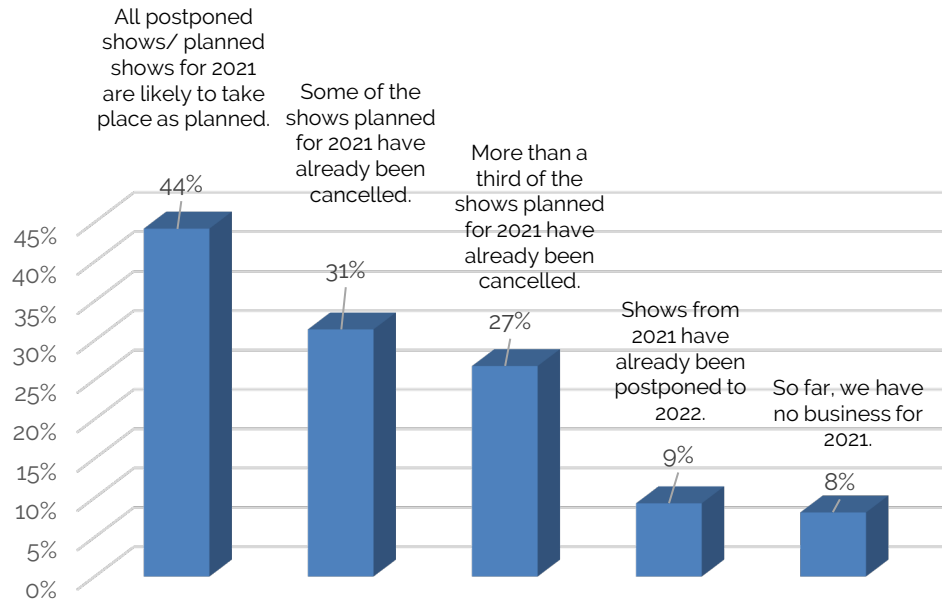
Products to generate alternative income

	Shopfitting (7,5%)		Digital Products (14%)		Signage (6%)
	Virtual event/ exhibition (10%)		Consulting/Training (51%)		Air Conditioning (5%)
	Mobile sanitary locks (20%)		Graphic works (24%)		Event organization (15%)
	CoVid prevention products (5%)		Catering (100%)		AV content (30%)
	Interiors (12,5%)		Office renewal (10%)		Showrooms (20%)

The percentages represent the approximate level of revenue of the regular sales volume, earned through the respective products.



Regarding 2021, which statements apply best:



The survey revealed that already at the time of data collection, barely half of the responders indicated that all postponed and initially planned shows for 2021 are likely to take place as scheduled.

This figure is underlined by the fact that 31% of responders state that some shows have already been cancelled, and 27% state that even more than a third of all shows have been cancelled for 2021.

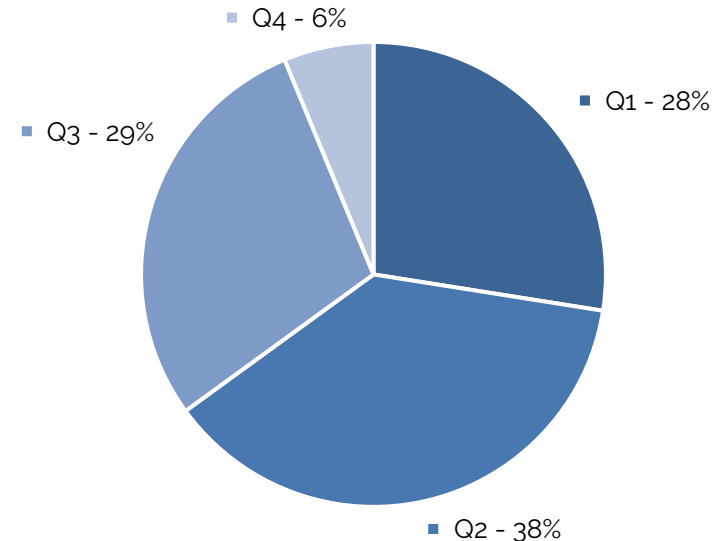
Some shows for 2021 have even been postponed to 2022 already and roughly 10% of the responders claim to have no business so far for the upcoming year.

In which quarter of 2021 do you expect to see exhibitions taking place?

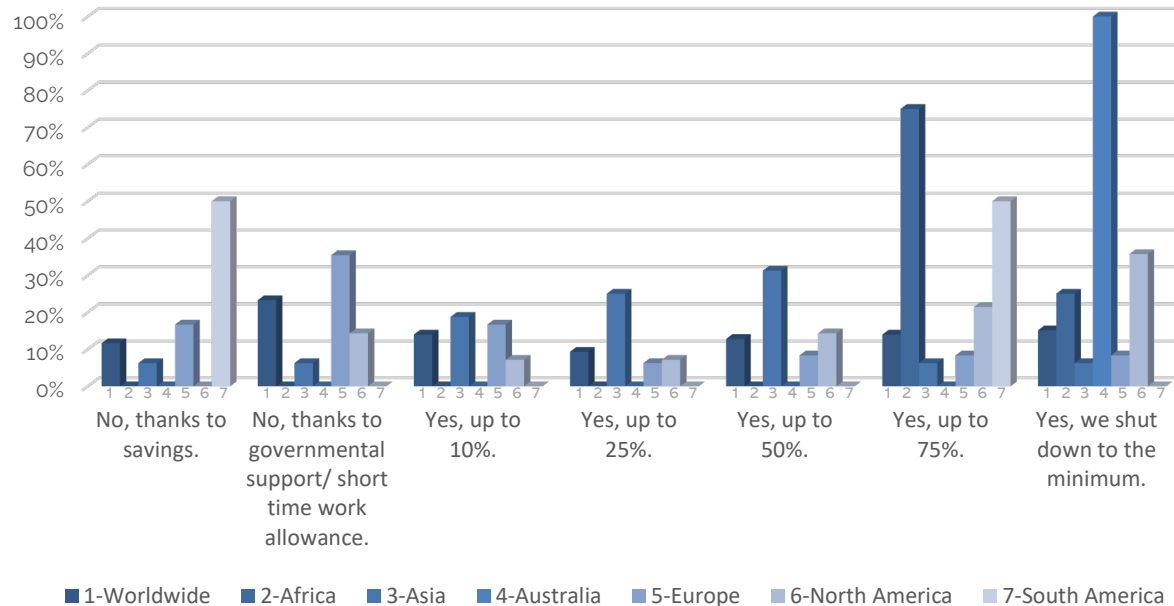
Assumptions regarding the comeback of trade fairs vary widely and are spread over the whole year 2021. Two thirds of the participants expect a new start in the first half of the year. Another 29% in Q3 and 6% in the last quarter of the year.

These statements were made with some reservations, such as that trade fairs will start in the first half of the year, with fewer events, but that the majority of business will not take place until the second half. Or that the occurrence of fairs strongly depend on the spread of the virus and whether planned shows are feasible as planned.

These expectations match the results of the previous question regarding the currently (government's) planned re-opening dates of trade fairs, either mostly in the first half of 2021 or not being announced yet.



Have you already had to lay off employees?

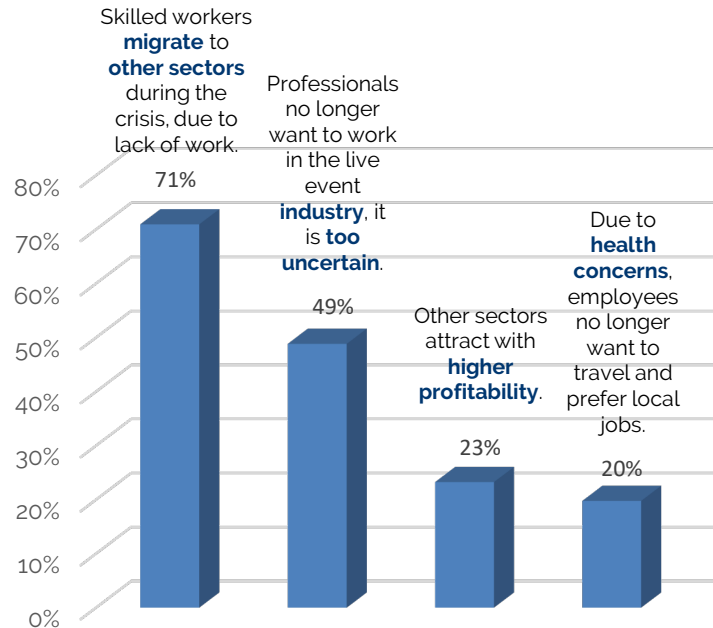


The results of this question vary widely, as they depend strongly on governmental support in the respective countries.

23% of those surveyed stated that they had not had to lay off any employees due to state aid. These figures come mainly from Europe, North America and Asia.

Especially responders from Africa, Australia and South America reported layoffs of up to 75% and even more.

Upcoming challenges regarding employees



Besides the predefined selection, further challenges were defined. Since this question is not necessarily influenced by global effects, the challenges differ from continent to continent and country to country.

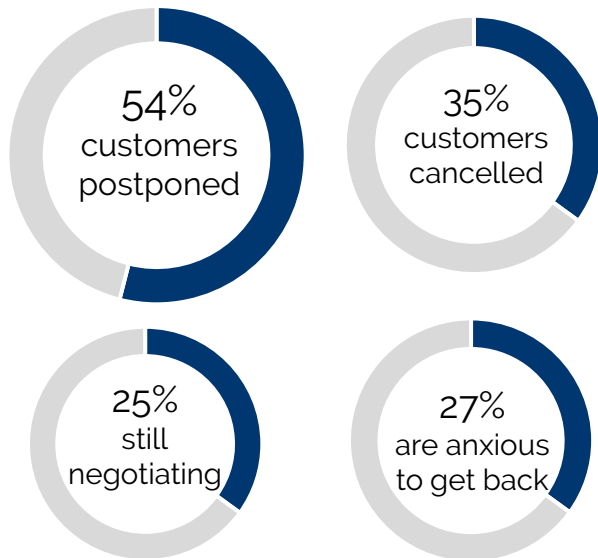
In Africa, for example, many workers change jobs due to lack of unemployment insurance to ensure their livelihood. As a result, a process that will take years to stabilize the number of employees in the live event industry is expected to continue.

On the other hand, employees in Spain are holding on to their jobs because the unemployment market is overloaded, with no prospect of alternative employment.

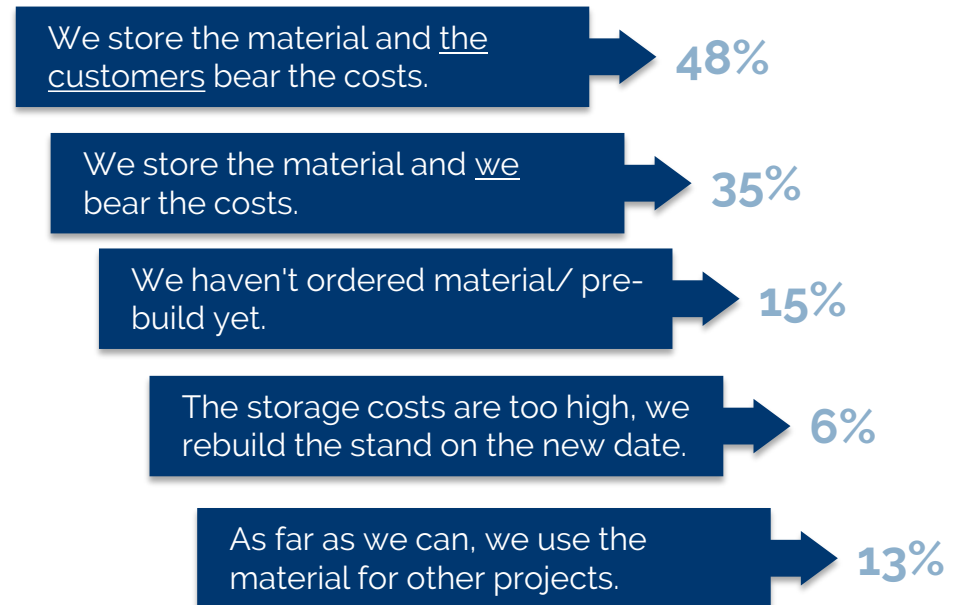
In general, the migration of skilled employees is one of the biggest challenges. But not only employees, also companies and partners might migrate to alternative sectors.

Other challenges mentioned are the motivation of the employees and the relief costs, caused by the layoffs due to a decreased number of projects in 2021.

Regarding postponed exhibitions, how did customers react?



In case of postponement, what happens to pre-build stands/material?



Current challenges regarding customers



- Fear of exhibiting + cancellations, thus inability to commit
- Travel restrictions
- Less budget for trade shows / Cost savings
- Shift of budgets/ investments
- Uncertainty of mediaplanning / new marketing channels
- Storage costs
- Less attendances in (fewer) trade shows
- Lack of confidence + trust to return to trade shows
- Health concerns
- Discussions concerning responsibilities e.g. cancellation/ costs and signed contracts
- Late confirmation/ cancellation of events and related consequences e.g. deposits
- Fear of wasting money (e.g. short-term cancellation)
- Fear of poor ROI due to low attendance

n = 80 | OQ

Challenges arising in the future

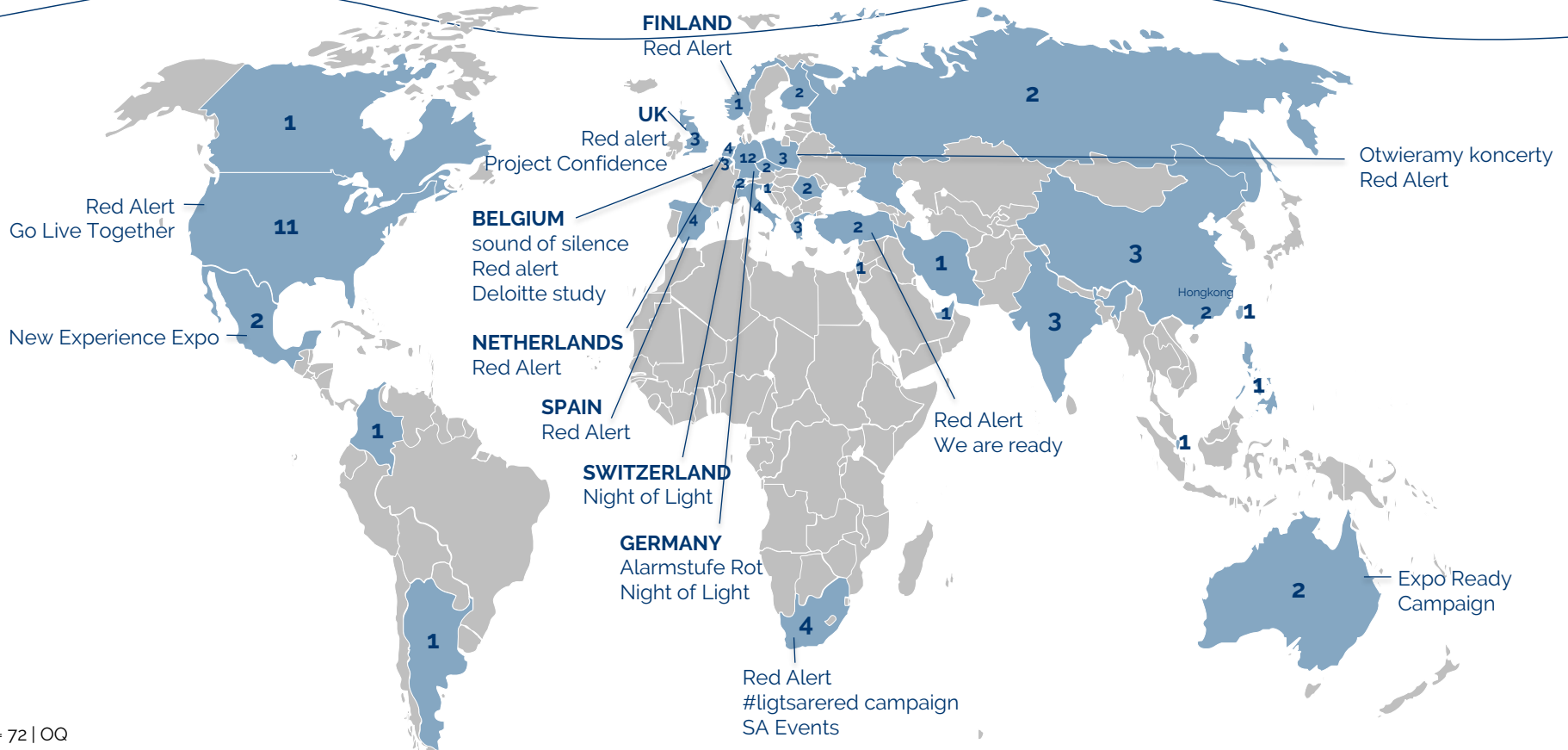


Besides challenges facing the customers:

- Uncertainty on all sides
- Smaller and fewer shows
- Slow opening and recovery of the industry
- Difficult buildups due to H&S restrictions
- Limited visitor numbers / their targeting to the industry
- International trade blocks
- Complete lockdown of all exhibitions
- Re-attraction of exhibitors + rebuilding trust
- Maintaining good staff/ skilled team recovery
- Providing capital
- Decrease in prices
- Extra costs to meet CoVid regulations
- Staying in business until industry recovers
- Merging virtual concepts with live formats

n = 76 | OQ

Initiatives



Digital disruption has long been an issue in the trade fair industry. CoVid-19 has accelerated this upheaval. Many digital formats have arrived to remain.

How are you reacting to arising challenges regarding digital formats?



- Close contact to existing clients
- Obtain expert advice and extend portfolio
- Finding digital solutions and add-ons to live events e.g. live streams
- Preparing for Hybrid Events
- Support customers to develop digital product
- In-house training on new products
- Looking for cooperation partners
- View digital as support to go live again
- New focus on social media channels

Vs.

- Waiting/observing, as digital cannot replace face2face
- Low customer demand on digital formats
- Digital as threat to face2face industry
- Too high investment for too low outcome

n = 76 | OQ

What is promising for the future?



- Merger of digital and live into hybrid format
- Digital product extensions
- Investing in digitalization
- Less travel is required
- Rebuild company from scratch, suitable to new environment
- Product is ideal for smaller shows with less logistics and manpower
- Greater organization and post show contact
- Acceleration on AI/VR technology
- Government responding to our claims
- Customers realizing the efficiency of face2face
- Finding a vaccine
- Diversity within the own business (portfolio)
- Postponements mean lots of events taking place
- New global attendees through digital formats
- Fewer suppliers in the industry

n = 73 | OQ

What do you already offer to customers?

- ✓ Virtual Solutions
 - Virtual events/exhibitions/showrooms
 - Including VR and design
- ✓ Multimedia integrated in stand design
- ✓ Digital platforms
 - Online ordering module
 - Event registration
- ✓ Hybrid concepts (incl. Corporation partners)
- ✓ Green Screen studio
- ✓ Video production
- ✓ Marketing Automation
- ✓ Content planning for web shops
- ✓ Live Streaming
- No offer of digital solutions at all

What impact of digitalization do you expect?

- Customers use virtual tools now, but are looking forward to face2face events
- Expectation of digitalization of 50% in various forms
- Digital formats not seen as a long-term revenue stream in the industry
- Not all of our labor can be digitized
- Hybrid Events
- Digital on site, not virtual

What are your current developments / offers to meet your customer needs?

- Adapting to crowd management
- Point of sale activity
- Keep on adapting to upcoming challenges/changes
- Storage and labor for some retail installations
- Digital tools as add on to portfolio
- Corporation with digital partners
- Stay close and stay connected with customers
- Organization of Road shows
- Offer visitor tracking for booth/event
- Ambassador programs to assist overseas exhibitors who cannot attend a physical event

IFSS

AFRICA

AFRICA



4 participants

4,65%

Of total results



Country

South Africa (4)



Inhabitants

58 Mio.

Ø no. of daily
new infections

1,357



Ø R-factor

0.9

Status as of 30 Sept. 2020

Re-opening Date

50% Expect
exhibitions to
take place from
Q1 2021

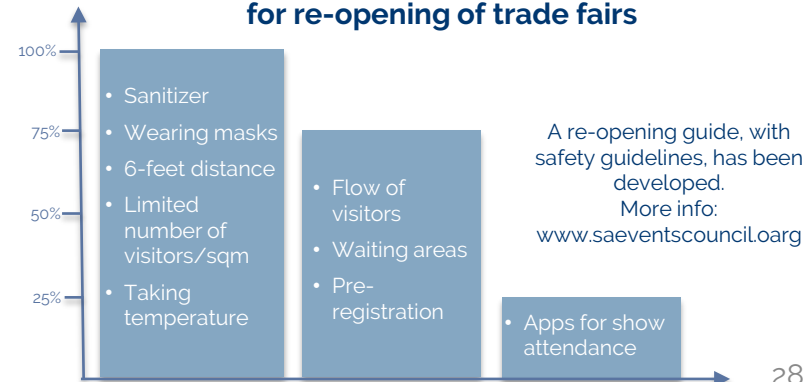
And 50%
from
Q2 2021

No exhibitions will take
place **until end of 2020**, as
they're not allowed yet.

Government has not
announced an official re-
opening date but most
likely in 2021.

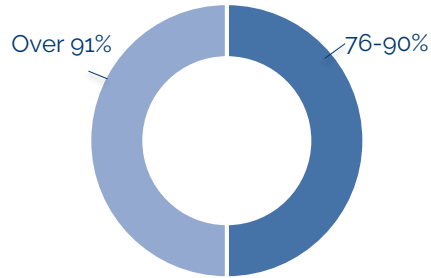
25% stated that all
postponed/ planned
shows for 2021 are likely to
take place as planned.

75% stated that some
of the shows planned for
2021 have already been
cancelled.

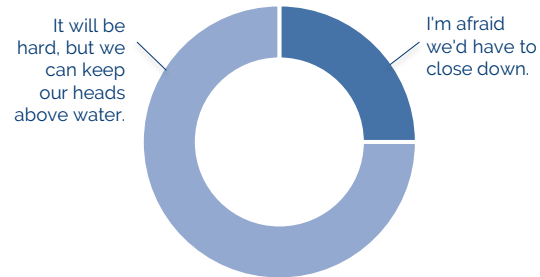
Hygiene concepts
for re-opening of trade fairs



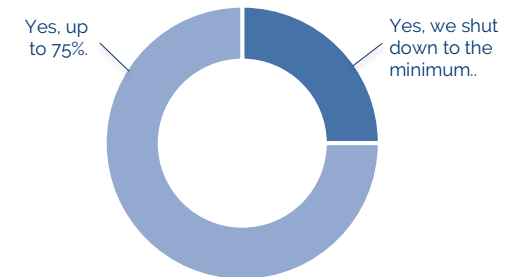
Drop in revenue as a Y/Y comparison to 2019



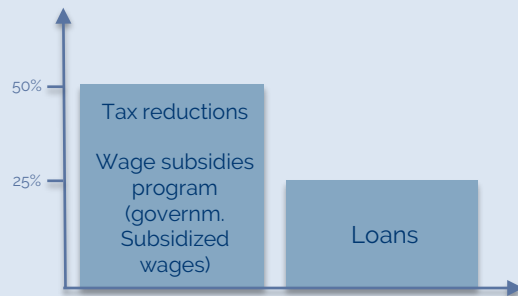
In case of 6 additional months without business



Have you already had to layoff employees?



Government Support



Alternative Income



*revenue percentage of regular sales volumes

Initiatives to raise awareness for live event industry

- #LightSARed (Red Alert)
- Webinars and meetings with government
- www.saeventscouncil.org

Upcoming challenges regarding **employees**



75% Skilled workers migrate to other sectors during the crisis, due to lack of work.

75% Professionals no longer want to work in the live event industry, it is too uncertain.

Low Unemployment insurance leads to migration of workers, to ensure livelihood. Recovery of staff levels will take time.

Upcoming challenges regarding **customers**



- Uncertainty and lack of confidence in the advertising platform

- Uncertainty regarding re-opening of exhibitions/business (also due to poor reactions of government to industry needs)

- Low engagement without events

Upcoming challenges due to CoVid in the **future**



- Smaller and fewer shows

- Limited number of visitors, hopefully targeted to industry

- Reduced client budgets and lower ability to commit until industry has recovered

- More difficult buildups due to H&S restrictions

- Fears of visitors

Customer reaction in case of postponements

75%

Most customers postponed their participation to the new date.

25%

We're still negotiating how to handle the situation.

25%

Most customers are anxious to get back to trade events.

Pre-build stands/ material use after postponement

50%

We store the material and the customers bear the costs.

50%

We store the material and we bear the costs.

25%

We haven't ordered material/ pre-build yet.

Digital disruption has long been an issue in the trade fair industry. CoVid-19 has accelerated this upheaval. Many digital formats have arrived to remain.



IFSS

ASIA

ASIA



16 participants

18.6%

Of total results

Exhibitions in 2020

- Taiwan and partly China claimed to be back into business in full.
- In China, Hongkong, Iran, Russia and UAE, national exhibitions are taking place again. In Russia even international ones.
- In India, Isreal and the Philippines, exhibitions are still not allowed to take place.



Countries



Inhabitants



Ø no. of daily
new infections



Ø R-factor

China (3)	1,450 Mio.	10	0.9
Hongkong (2)	7 Mio.	10	-
India (3)	1,300 Mio.	93,330	-
Iran (1)	84 Mio.	2,1	1.6
Israel (1)	9 Mio.	-	2.5
Philippines (1)	100 Mio.	3000	-
Russia (2)	144 Mio.	-	-
Singapore (1)	5.8 Mio.	30	1
Taiwan (1)	23 Mio.	0	-
UAE (1)	10 Mio.	1000	-

Re-opening Date

In which quarter of 2021 do you expect to see exhibitions take place?



Status of 30 Sept. 2020, India is currently planning on re-opening in Q1 2021.

Some shows in Russia are already taking place again.

China and Hongkong are planning on 2021 and the remaining countries have not announced an official date yet.

46.7% stated that all postponed/ planned shows for 2021 are likely to take place as planned.

100%	- China
33.3%	- India
100%	- Russia
100%	- Taiwan

20% stated that some of the shows planned for 2021 have already been cancelled, but no more than a third of all 2021 shows.

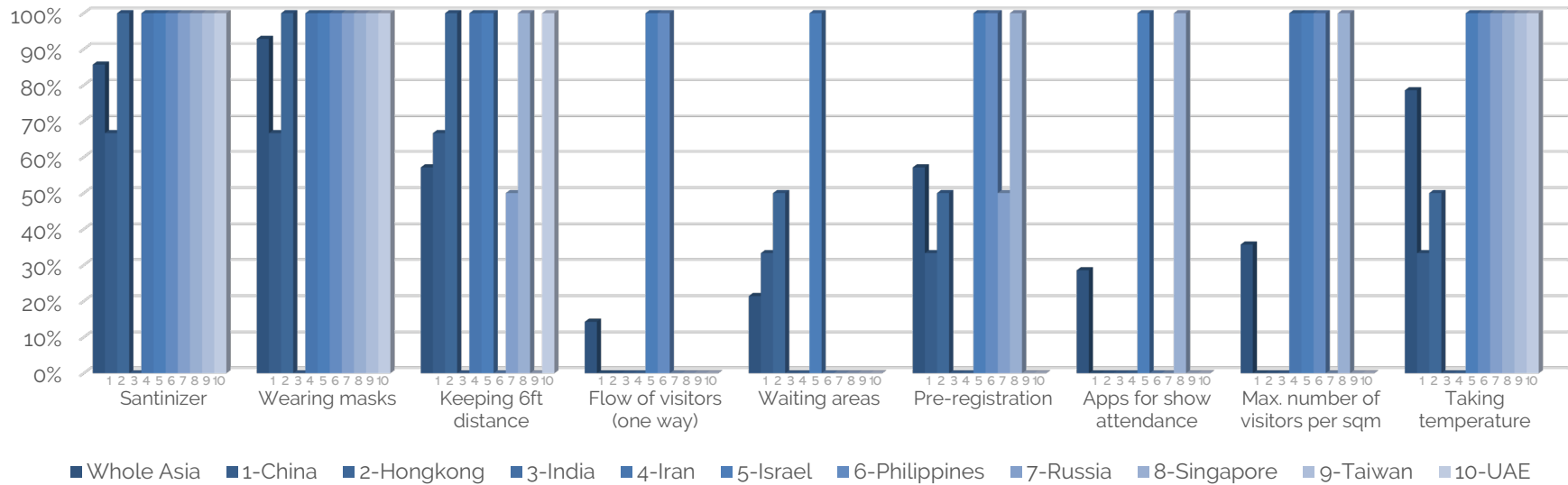
50%	- Hongkong
100%	- Israel
100%	- UAE

33.3% stated that so far, they have no business for 2021.

50%	- Hongkong
66.6%	- India
100%	- Israel
100%	- Philippines

In general, shows are planned but there is a great uncertainty whether they will actually take place.

Hygiene concepts for re-opening of trade fairs



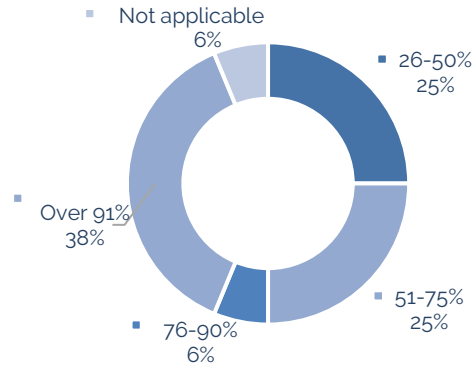
Indian industry associations proposed guidelines to government, which will establish general rules.

Contactless registration

<https://www.stb.gov.sg/content/stb/en/home-pages/advisory-for-MICE.html>

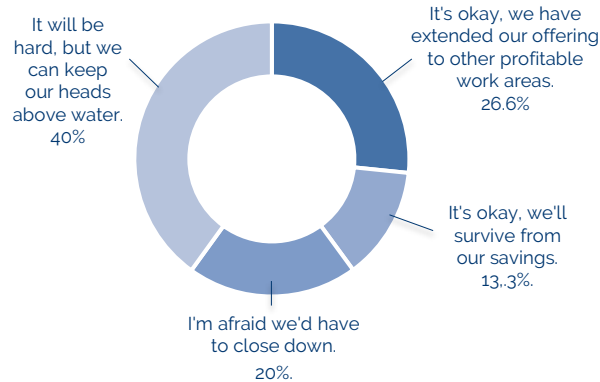


Drop in revenue as a Y/Y comparison to 2019



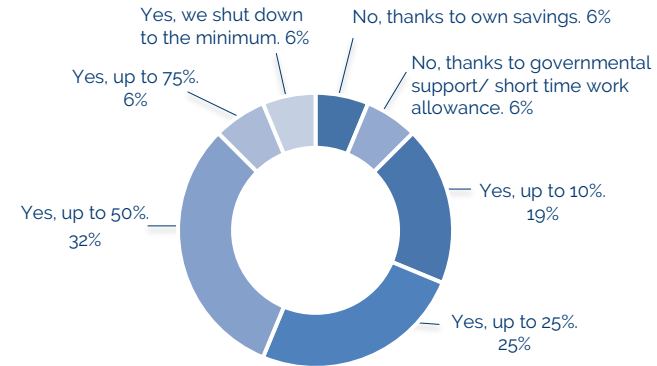
	26-50%	51-75%	76-90%	Over 91%	n/a
China	33.3%	33.3%		33.3%	
Hongkong				100%	
India		33.3%	33.3%		33.3%
Iran				100%	
Israel				100%	
Philippines				100%	
Russia		100%			
Singapore	100%				
Taiwan	100%				
UAE	100%				

In case of 6 additional months without business



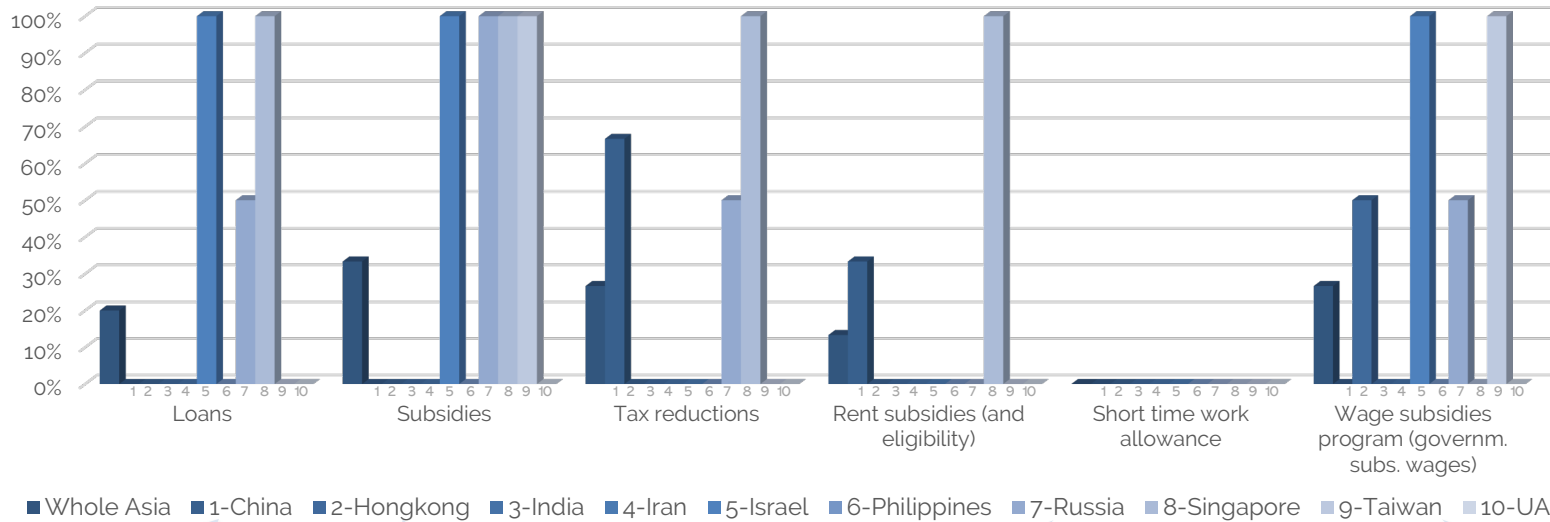
	Other income	Savings	Close down	Heads up
China	66.6%			33.3%
Hongkong			50%	50%
India			33.3%	66.6%
Iran				100%
Israel		100%		
Philippines				100
Russia	100%			
Singapore		100		
Taiwan	-	-	-	-
UAE			100%	

Have you already had to layoff employees?



	No. savings	No. support	Up to 10%	Up to 25%	Up to 50%	Up to 75%	Yes, min.
China	33.3%			33.3%	33.3%		
Hongkong					100%		
India					66.6%		33.3%
Iran						100%	
Israel				100%			
Philippines				100%			
Russia		50%	50%				
Singapore			100%				
Taiwan			100%				
UAE				100%			

Government support for the live event industry



■ Whole Asia ■ 1-China ■ 2-Hongkong ■ 3-India ■ 4-Iran ■ 5-Israel ■ 6-Philippines ■ 7-Russia ■ 8-Singapore ■ 9-Taiwan ■ 10-UAE

There are no
CoVid related
subsidies

25% for 6 months
Only as part of
MPF scheme

Possibility to
increase existing
loans by 20%

Measures not
applicable for
everyone

https://www.singaporebudget.gov.sg/budget_2020

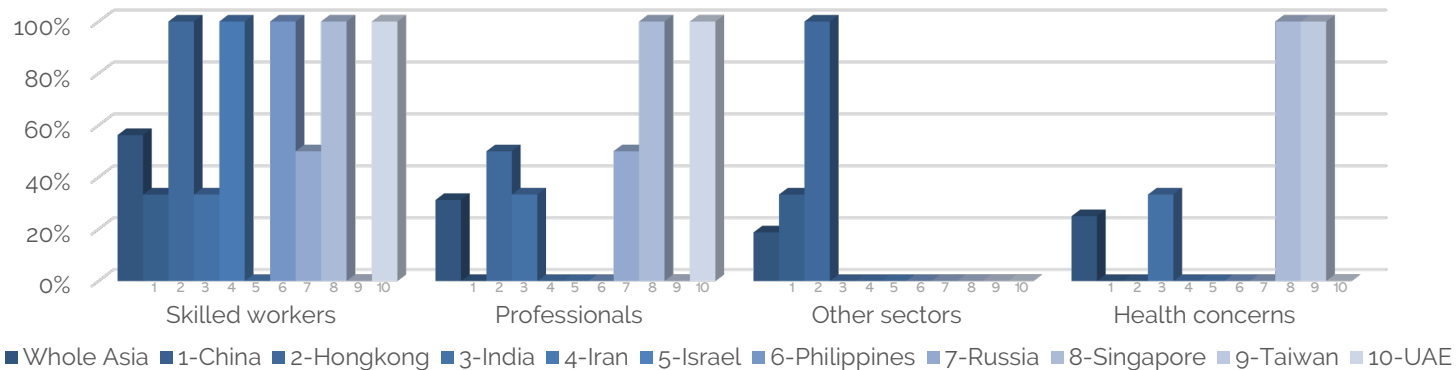
30% wage
subsidy

Products/services to maintain some level of revenue

<p>China</p> <ul style="list-style-type: none"> Online Shop Design Service, Showroom Design, Construction (50%) 	<p>Hongkong</p> <ul style="list-style-type: none"> Virtual event/exhibition (5-10%) 	<p>India</p> <ul style="list-style-type: none"> Architectural Design Services, Temporary Structures (5%) Grocery, signages, interiors and CoVid prevention products (n/a) 	<p>Iran</p> <ul style="list-style-type: none"> Design and implementation of interior decoration (15%) 	<p>Isreal</p> <ul style="list-style-type: none"> Virtual events (10%)
<p>Philippines</p> <ul style="list-style-type: none"> Furniture and Design outsourcing (2%) 	<p>Russia</p> <ul style="list-style-type: none"> Internal events + Corporation with government (n/a) Mobile Sanitary Locks (20%) 	<p>Singapore</p> <ul style="list-style-type: none"> CoVid prevention supply – temporary community care centers (20%) 	<p>Taiwan</p> <p>-</p>	<p>UAE</p> <ul style="list-style-type: none"> CoVid prevention supply (n/a) Fitout solutions (n/a) Sustainable offer (n/a)

*Percentage figures represent the level of revenue of regular sales volume.

Biggest upcoming challenges regarding employees

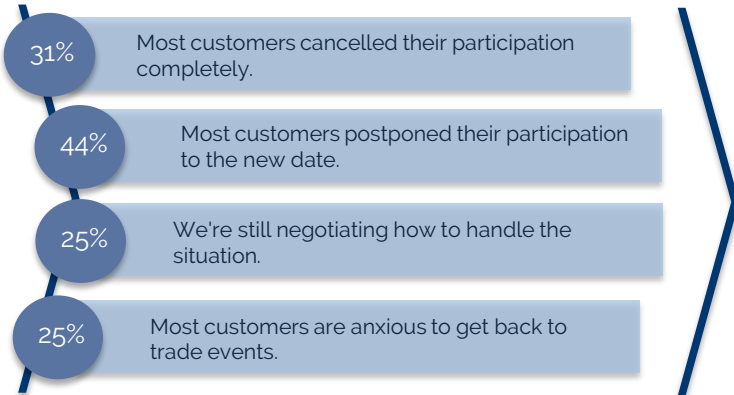


Initiatives to raise awareness for needs of live event industry

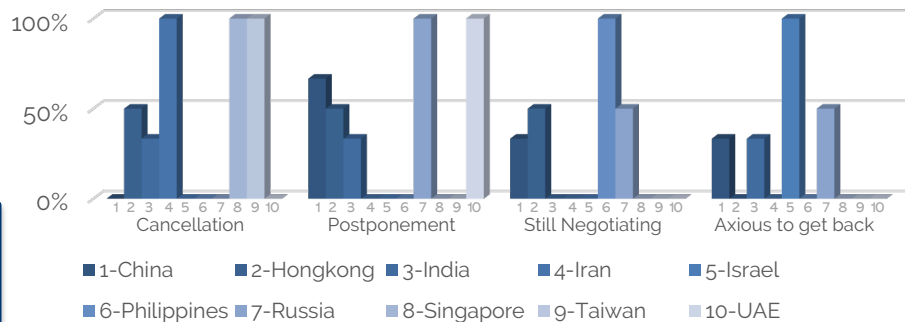




Customer reaction in case of postponements



Pre-build stands/ material use after postponement



IFSS



AUSTRALIA

AUSTRALIA



2 participants

2.33%

Of total results



Country

Australia (2)



Inhabitants

25 Mio.



Ø no. of daily new infections

40



Ø R-factor

-

Status as of 30 Sept. 2020

Re-opening Date

100% Expect exhibitions to take place from **Q1 2021**

A **few national exhibitions** are already taking place until the end of 2020, mostly in hybrid format.

Government has not announced an official reopening date but most likely in 2021.

50% stated that all postponed/ planned shows for 2021 are likely to take place as planned.

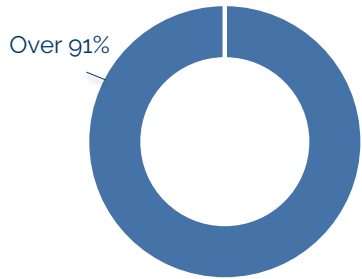
50% stated that some of the shows planned for 2021 have already been cancelled.

Hygiene concepts for re-opening of trade fairs

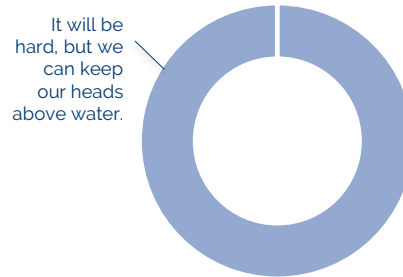




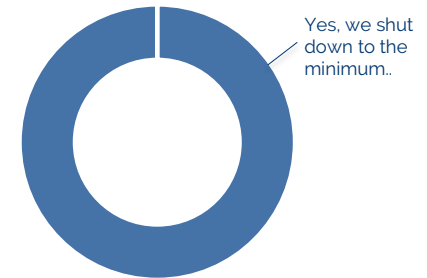
Drop in revenue as a Y/Y comparison to 2019



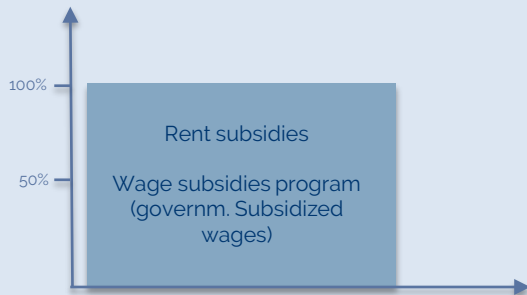
In case of 6 additional months without business



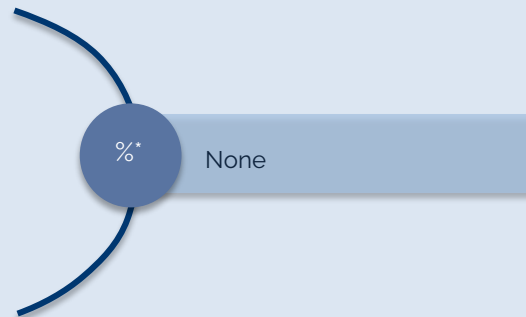
Have you already had to layoff employees?



Government Support



Alternative Income



Initiatives to raise awareness for live event industry

- Expo Ready Campaign
- New grant from federal government to support approved trade shows
- Lobby work from national associations to draw awareness to devastated businesses

*revenue percentage of regular sales volumes

Upcoming challenges regarding **employees**



- 50%** Skilled workers migrate to other sectors during the crisis, due to lack of work.
 - 50%** Professionals no longer want to work in the live event industry, it is too uncertain.
 - 50%** Due to health concerns, employees no longer want to travel and prefer local jobs.
- Higher layoffs and their costs due to smaller projects and less revenue.

Upcoming challenges regarding **customers**



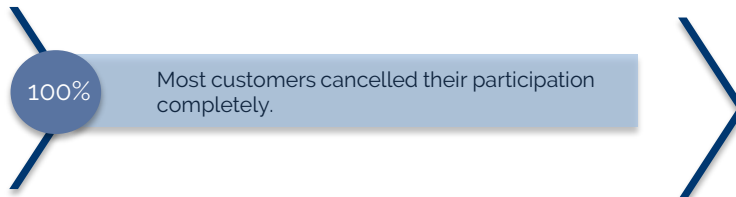
- Storage costs
- Lack of confidence in the industry and uncertainty regarding re-opening
- Less face2face events and increasing number of digital events
- Closing of interstate borders

Upcoming challenges due to CoVid in the **future**

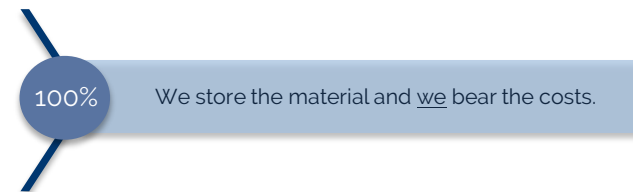


- Smaller budgets
- Lack of confidence in exhibition medium
- Extra costs to meet new CoVid regulations
- Re-attracting exhibitors
- Hybrid and its costs as competitor

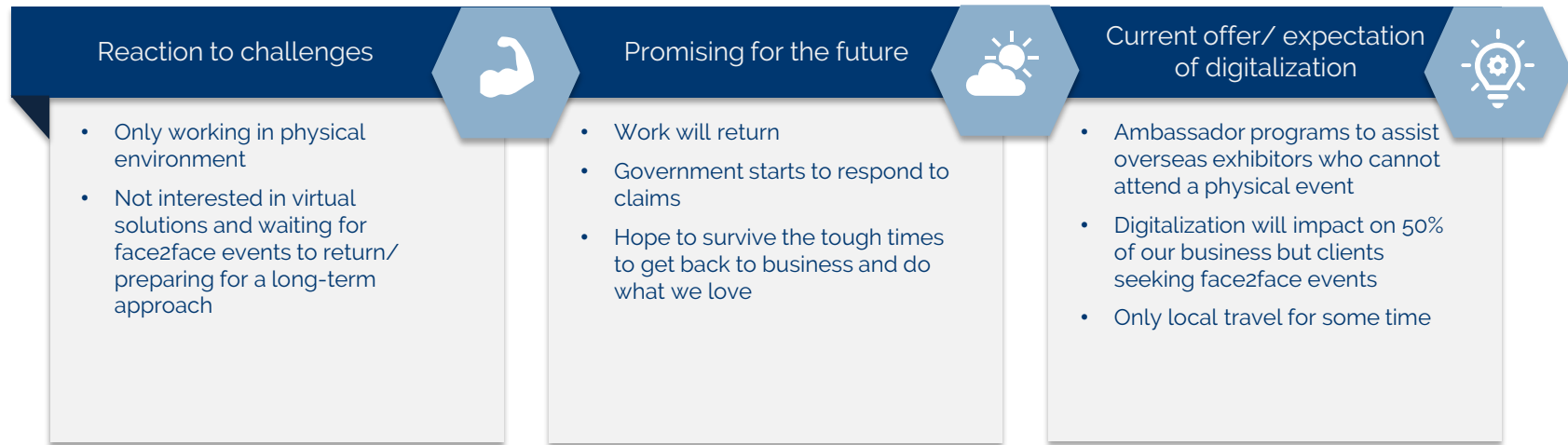
Customer reaction in case of postponements



Pre-build stands/ material use after postponement



Digital disruption has long been an issue in the trade fair industry. CoVid-19 has accelerated this upheaval. Many digital formats have arrived to remain.



IFSS



EUROPE

EUROPE



48 participants

56%

Of total results

Exhibitions in 2020

- Italy partly claims to be back into business in full.
- In Belgium, Switzerland, Czech Republic, Netherlands, Slovenia, Turkey and UK, national exhibitions are taking place again. In Germany, Spain, Italy and Poland even international ones.
- In, Greece, Norway and Romania and parts of Belgium, Spain and the UK exhibitions may still not take place.

In some countries, even though exhibitions are allowed to take place, organizers cancel due to lack of exhibitors or they do not want to take over responsibility due to infection risk.



Countries



Inhabitants



Ø no. of daily
new infections



Ø R-factor

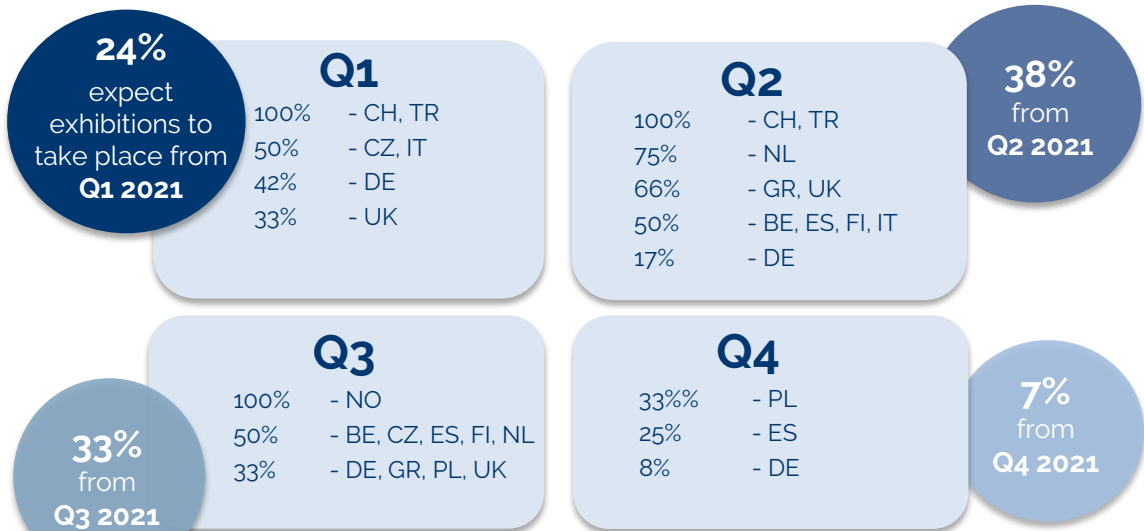
Belgium (3)	11 Mio.	826	1.15
Switzerland (2)	8.5 Mio.	410	1.05
Czech Republic (3)	10 Mio.	2,000	-
Germany (12)	83 Mio.	1,611	1.0
Spain (4)	47 Mio.	1,000	-
Finland (2)	5.8 Mio.	45	-
Greece (3)	10.5 Mio.	245	0.1
Italy (4)	47 Mio.	1,000	0.7
Netherlands (4)	17 Mio.	1,766	1.3
Norway (1)	5 Mio.	35	-
Poland (3)	38 Mio.	807	-
Romania (1)	19.5 Mio.	1,050	0.9
Slovenia (2)	2 Mio.	94	-
Turkey (1)	80 Mio.	1,635	1.51
UK (1)	66.5 Mio.	3,650	1.2

Status as of 30 Sept. 2020



Re-opening Date

In which quarter of 2021 do you expect to see exhibitions take place?



Status of 30 Sept. 2020, Currently planned re-opening dates:

2020: CH

2021 – early 2021 (DE, FI, GR), Q1 (BE, IT, UK), Q2 (ES, FI, UK), Q3 (DE)

General 2021: ES, GR, IT, TR

n/a: DE, GR, PL, RO, UK

31% stated that all postponed/ planned shows for 2021 are likely to take place as planned.

- 100% - TR
- 75% - IT
- 67% - UK
- 50% - CH, FI, RO
- 33% - BE, GR
- 25% - NL
- 17% - DE

46% stated that some of the shows planned for 2021 have already been cancelled.

- 67% - BE, DE, PL
- 50% - CH, CZ, FI, IT, PL
- 33% - GR, UK
- 25% - ES, NL

15% said even more than a third of all shows for 2021 have been cancelled.

- 100% - NO, PL
- 50% - CZ
- 17% - DE

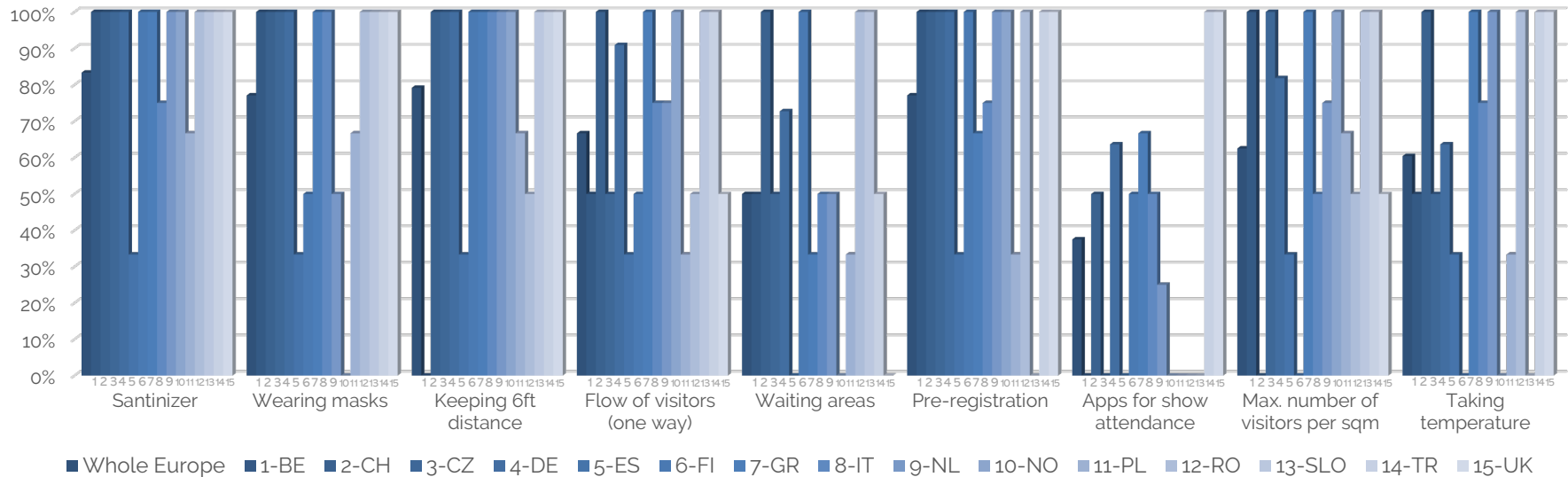
15% Stated that shows from 2021 have already been postponed to 2022.

- 50% - CH, CZ
- 33% - PL
- 25% - DE

27% stated that so far, they have no business for 2021.

- 100% - PL
- 50% - DE
- 33% - BE
- 25% - ES, IT, NL

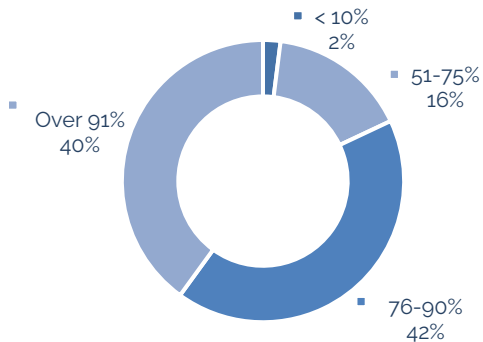
Hygiene concepts for re-opening of trade fairs



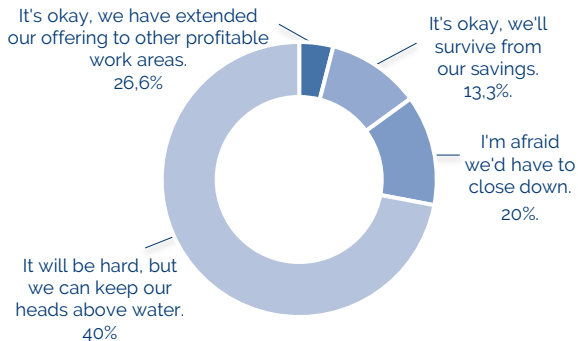
Exhibition Centers have similar rules but vary slightly



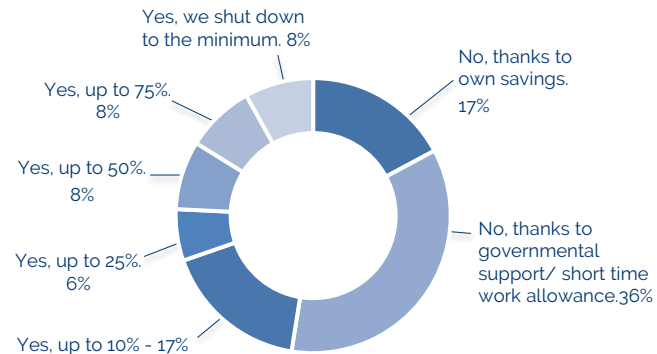
Drop in revenue as a Y/Y comparison to 2019



In case of 6 additional months without business



Have you already had to layoff employees?



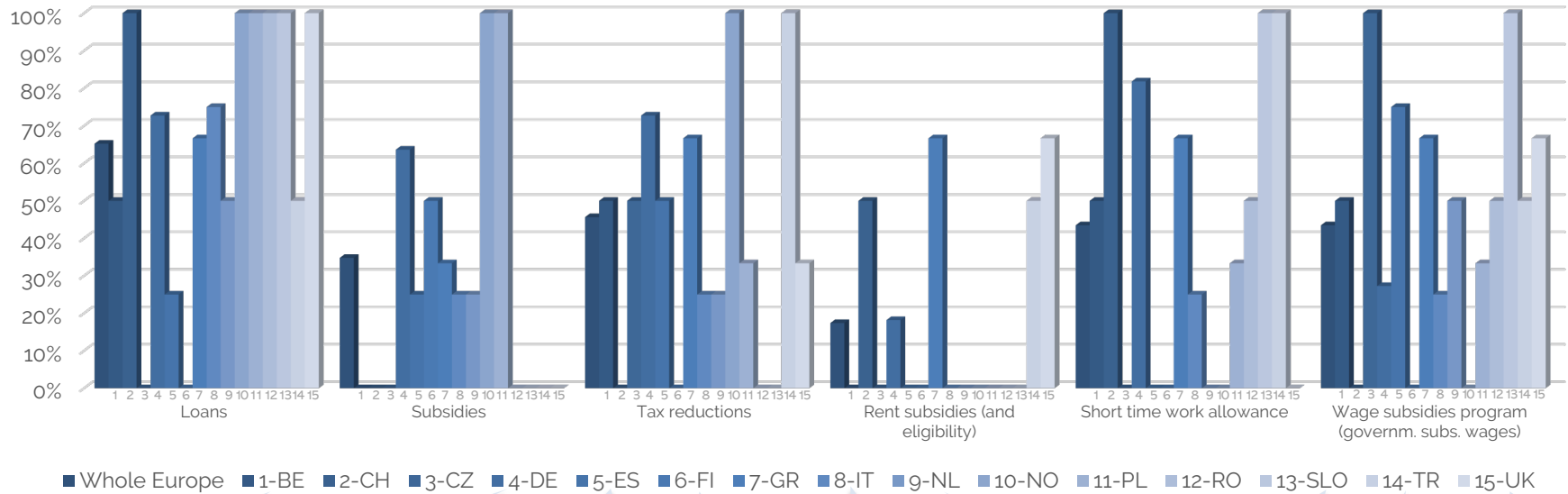
	< 10%	51-75%	76-90%	Over 91%
BE		33%	67%	
CH		100%		
CZ			50%	50%
DE				
ES		50%	25%	25%
FI				100%
GR			67%	33%
IT	25%	25%	25%	25%
NL		25%	50%	25%
NO				100%
PL			33%	67%
RO			50%	50%
SLO		100%		
TR				100%
UK			67%	33%

	Other income	Savings	Close down	Heads up
BE				100%
CH			50%	50%
CZ		50%		50%
DE		17%	25%	
ES	25%			75%
FI		100%		
GR			33%	67%
IT				100%
NL				100%
NO				100%
PL				100%
RO				100%
SLO				100%
TR				100%
UK	33%		33%	33%

	No. savings	No. support	Up to 10%	Up to 25%	Up to 50%	Up to 75%	Yes, min.
BE			33%		67%		
CH			50%	50%			
CZ	50%		50%				
DE	8%	58%	18%	8%		8%	
ES		75%					25%
FI						50%	50%
GR	33%	67%					
IT		25%	50%		25%		
NL	25%				25%		50%
NO		100%					
PL	33%	33%				33%	
RO	50%			50%			
SLO	100%						
TR	50%	50%					
UK		33%	33%			33%	



Government support for the live event industry



Legend: ■ Whole Europe ■ 1-BE ■ 2-CH ■ 3-CZ ■ 4-DE ■ 5-ES ■ 6-FI ■ 7-GR ■ 8-IT ■ 9-NL ■ 10-NO ■ 11-PL ■ 12-RO ■ 13-SLO ■ 14-TR ■ 15-UK

Deloitte study to provide government with statistics

60 - 80% furlough, loans + some subsidies

Unemployment benefits 70% of salary (max. 110€/month) + available loans

Innovation subsidy for digitalization

www.simest.it/partecipazione-a-fiere-e-mostre

Max. 90% wage subsidy

Either short time work allowance (446€/month) or wage subsidy (max 892€/month)

60% wage subsidy

Sept. - 80%
Oct. - 60% wage subsidy

Products/services to maintain some level of revenue

<p>Belgium</p> <ul style="list-style-type: none"> Interior design, virtual booths & shopfitting (5-15%) 	<p>Czech Republic</p> <ul style="list-style-type: none"> Interiors & Museums (20%) Showrooms, Furniture, Digital Products (20%) 	<p>Germany</p> <ul style="list-style-type: none"> Hybrid events (10%) Showrooms, Interiors, Shopfitting (10%) CoVid prevention products (0,01-5%) Virtual booth (10%) Graphic works (20%) 	<p>Finland</p> <ul style="list-style-type: none"> Consultation (2%) Digital events (2%) 	<p>Greece</p> <ul style="list-style-type: none"> 10-day forum as substitute for big fair (15% of cancelled fair)
<p>Italy</p> <ul style="list-style-type: none"> Solutions to ease stand building (10%) CoVid prevention products (n/a) Catering & stand building (100%) 	<p>Netherlands</p> <ul style="list-style-type: none"> Inhouse Shows (10-30%) Training (100%) 	<p>Norway</p> <ul style="list-style-type: none"> CoVid prevention products (1%) 	<p>Poland</p> <ul style="list-style-type: none"> Design & Building Exhibition Stand (99%) Furniture, Interiors, Renovations (< 10%) 	<p>Romania</p> <ul style="list-style-type: none"> Air Conditioning (5%)

*Percentage figures represent the level of revenue of regular sales volume.



Products/services to maintain some level of revenue

*Percentage figures represent the level of revenue of regular sales volume.

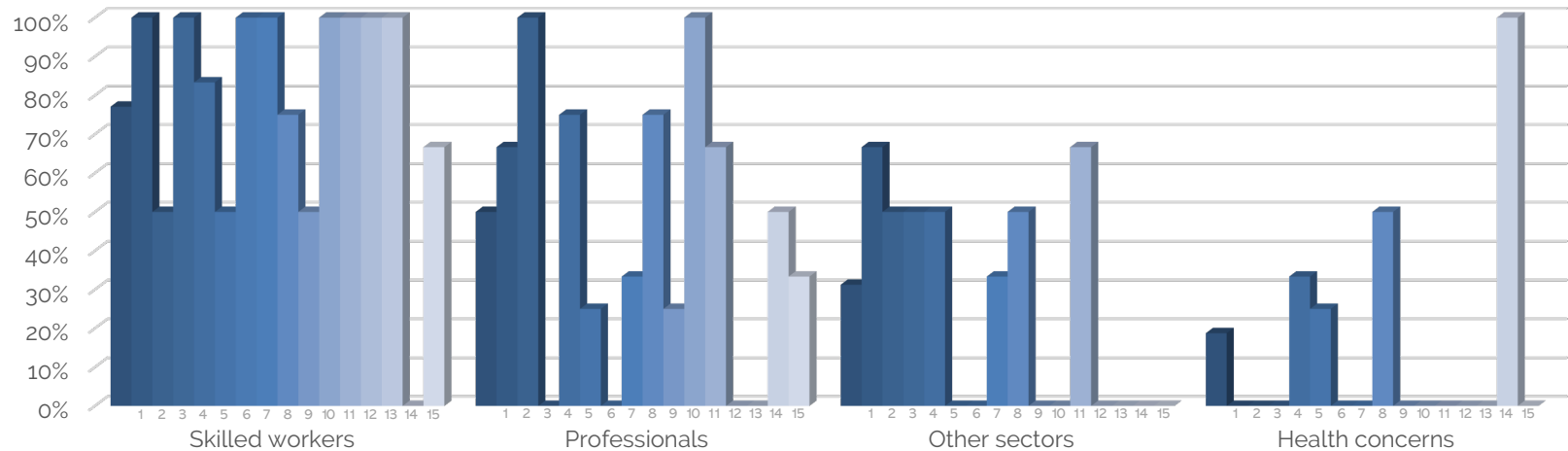
Slovenia	Spain	Switzerland	Turkey	UK
<ul style="list-style-type: none"> CoVid prevention supply for workplaces (0,8%) 	<ul style="list-style-type: none"> Online Events (10%) Interiors (30%) AV + content, digital signage (30%) CoVid prevention supply (3%) 	<ul style="list-style-type: none"> Digital Marketing Automation (< 10%) 	<ul style="list-style-type: none"> CoVid prevention products (5%) Digital warning products (5%) 	<ul style="list-style-type: none"> Storage, Interiors, Export Packing (10%) Signage, Bar rental services (< 10%) Research, industry studies, licenses for virtual events (10%)

Initiatives to raise awareness for needs of live event industry

Belgium Sound of silence	Czech Republic Associations cooperate with government	Italy Raising awareness on regional level, self-organized	Switzerland Night of light, demonstrations	UK Red alert, project confidence
Germany Alarmstufe Rot, Night of light	Spain, Finland, Netherlands Red Alert, Lobbying with government	Poland "otwieramy koncerty" - for music industry and concerts	Greece, Norway, Romania None	Turkey Red alert, we are ready event
Slovenia Lobbying with government				



Biggest upcoming challenges regarding employees



■ Whole Europe ■ 1-BE ■ 2-CH ■ 3-CZ ■ 4-DE ■ 5-ES ■ 6-FI ■ 7-GR ■ 8-IT ■ 9-NL ■ 10-NO ■ 11-PL ■ 12-RO ■ 13-SLO ■ 14-TR ■ 15-UK

Loss of people due to their personal financial situation

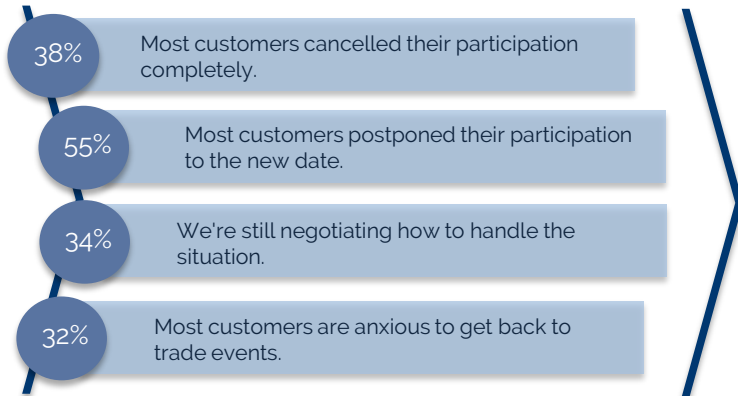
Employees will stay, too difficult to find a new job.
Future challenge to adapt to new situation

Expectation of employees to return (designers)

Fear of outsourcing partners migrating to other sectors as well

The duration of uncertainty makes people change jobs

Customer reaction in case of postponements

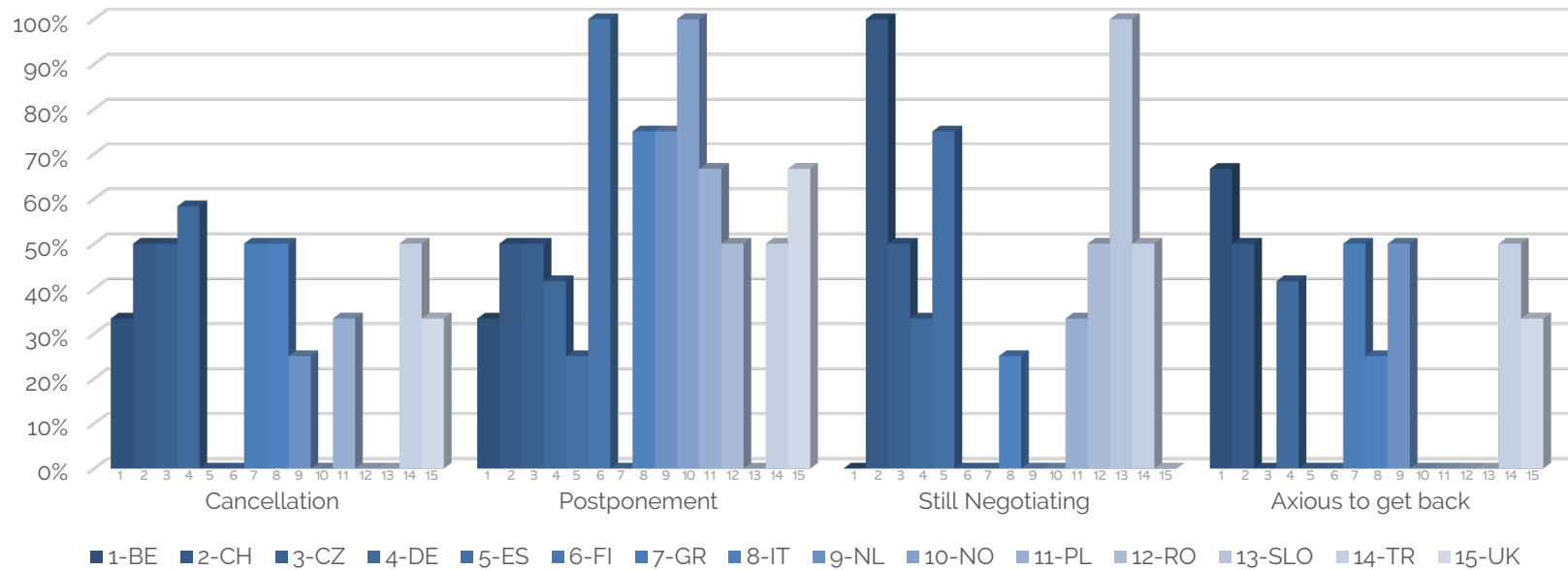


Pre-build stands/ material use after postponement



FINLAND	The first time, exhibitors postponed. When the event gets cancelled again, they request a full refund.
ITALY	Customers fear the risk of their investment in exhibitions
SLOVENIA	Neither clients nor organizers want to take over risks or responsibilities

Customer reaction in case of postponements





Pre-build stands/ material use after postponement



IFSS



NORTH AMERICA

NORTH AMERICA



14 participants

16.3%

Of total results

Exhibitions in 2020

- In Canada, exhibitions may still not take place. Outdoor events are limited to 100 people, indoor to 50 people.
- In Mexico a few national exhibitions are taking place.
- Parts of the United States still do not allow exhibitions to take place and in other parts, small regional shows are taking place.



Countries



Inhabitants



Ø no. of daily
new infections



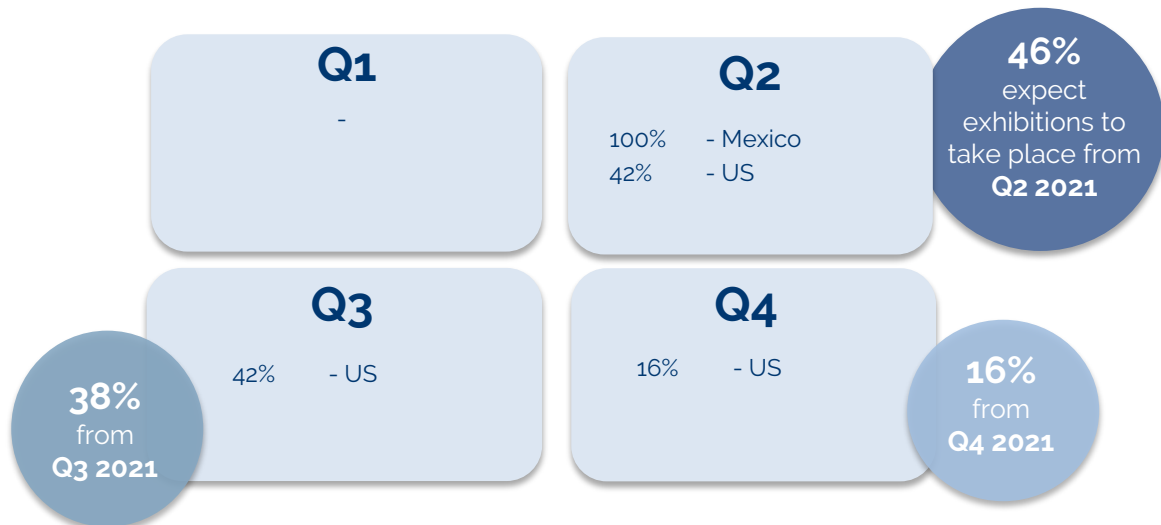
Ø R-factor

Canada (1)	38 Mio.	630	1.21
Mexico (2)	126 Mio.	600	11
USA (11)	328 Mio.	32,900	1.43



Re-opening Date

In which quarter of 2021 do you expect to see exhibitions take place?



Status of 30 Sept. 2020, Canada and most parts of the United States have not announced a re-opening date yet.

In different parts of the US, the currently re-opening dates are planned for Q1, Q2 and 2021.

14% stated that all postponed/ planned shows for 2021 are likely to take place as planned. } 50% - Mexico

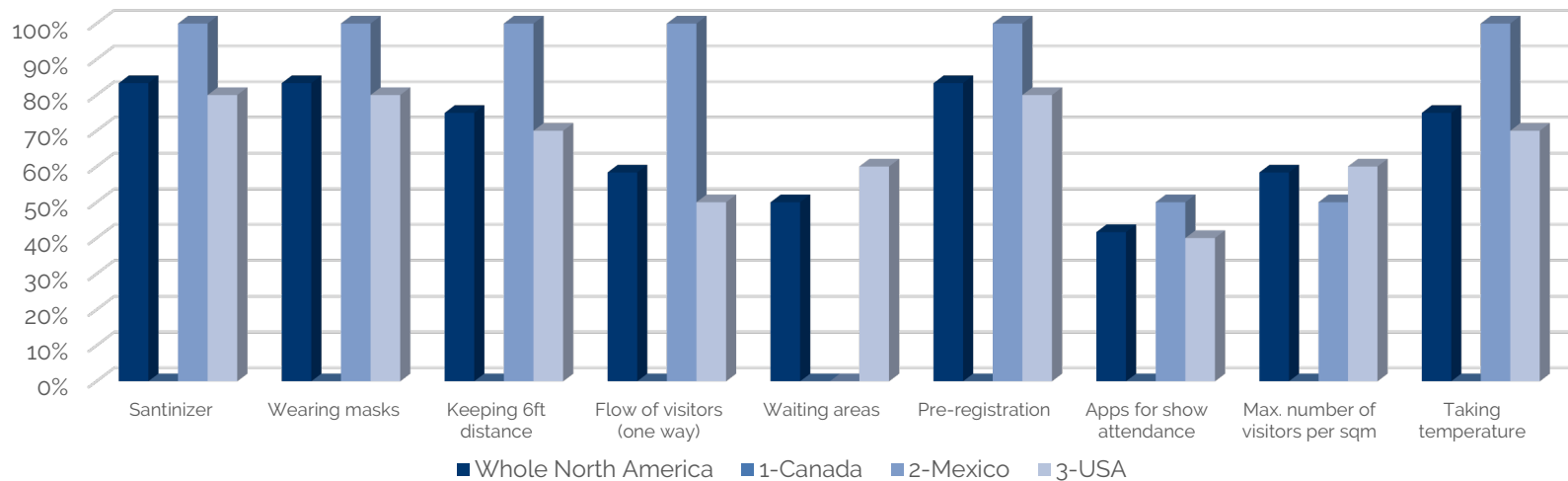
57% stated that some of the shows planned for 2021 have already been cancelled, but no more than a third of all 2021 shows. } 73% - US

7% Stated that shows from 2021 have already been postponed to 2022. } 9% - US

22% stated that so far, they have no business for 2021. } 100% - Canada, 18% - US

Many events are taking place virtually instead.

Hygiene concepts for re-opening of trade fairs

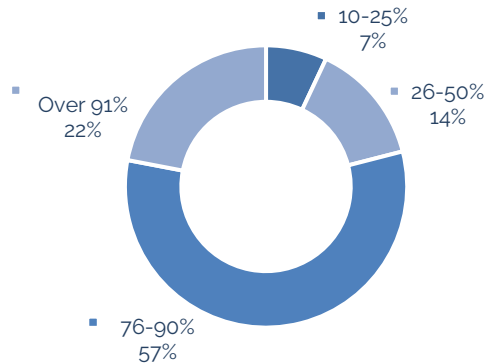


We are effectively within stage 5 of the recovery. We are currently in Stage 3.
<https://www.canada.ca/en/public-health/services/diseases/2019-novel-coronavirus-infection/guidance-documents/lifting-public-health-measures.html>
 - refer to Gatherings of Families and Friends, Mass Gatherings

Events are still not taking place but all measures are being evaluated

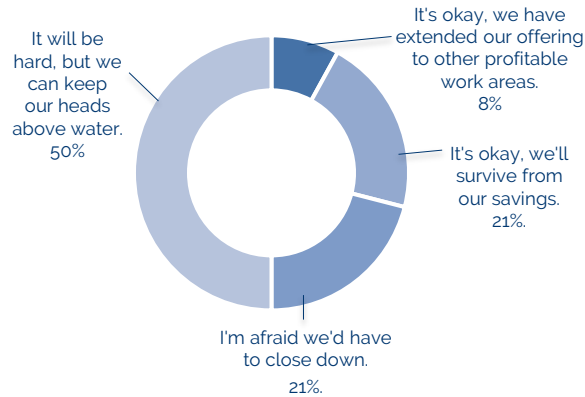


Drop in revenue as a Y/Y comparison to 2019



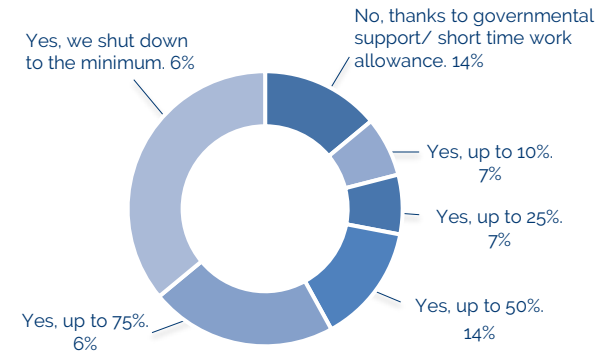
	10-25%	26-50%	76-90%	Over 91%
Canada			100%	
Mexico	50%		50%	
USA		18%	55%	27%

In case of 6 additional months without business



	Other income	Savings	Close down	Heads up
Canada		100%		
Mexico				100%
USA	9%	18%	28%	45%

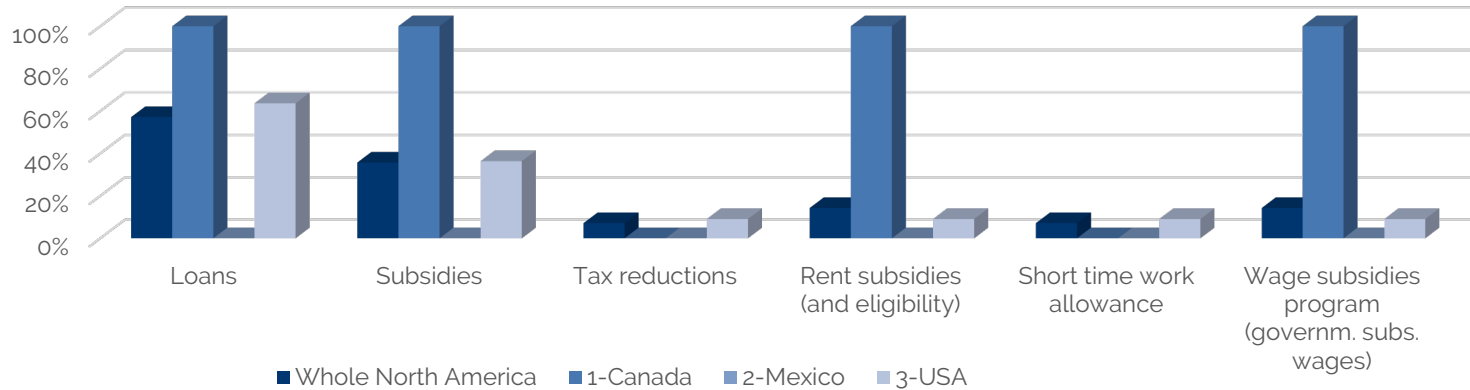
Have you already had to layoff employees?



	No, support	Up to 10%	Up to 25%	Up to 50%	Up to 75%	Yes, min.
Canada						100%
Mexico				50%	50%	
USA	18%	9%	9%	9%	18%	37%



Government support for the live event industry



■ Whole North America
 ■ 1-Canada
 ■ 2-Mexico
 ■ 3-USA

75% Wage Subsidy 50% Rent Subsidy (with Landlord providing an additional 25%) for a total of 75% rent reduction (April - Sept)

No support.

Loans based on average payroll, conditional use for payroll
 Short term small business loans
 Unemployment benefit has ended in August
 More info: www.edpa.com



Products/services to maintain some level of revenue

Canada	Mexico	USA
<ul style="list-style-type: none"> • PPE signage and barriers (< 5%) 	<ul style="list-style-type: none"> • CoVid prevention supply (10%) • Portable washers (10%) 	<ul style="list-style-type: none"> • Virtual shows/ exhibitions (10-20%) • Museum (10%) • Outdoor studios for consumers (5%) • Cabinets and millwork for permanent installations (n/a)

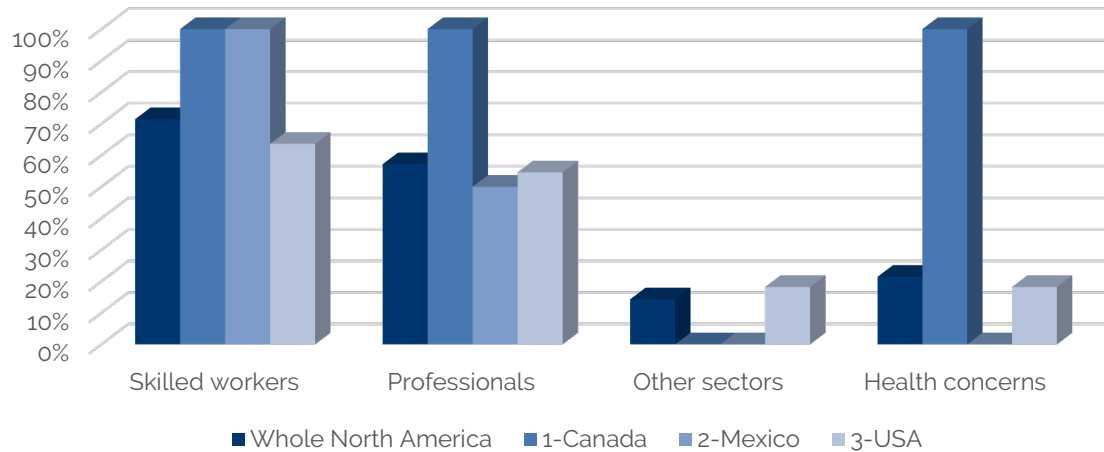
*Percentage figures represent the level of revenue of regular sales volume.

Initiatives to raise awareness for needs of live event industry

Canada	Mexico	USA
Fairly small trade industry in Canada, considered part of tourism industry. Advocacy by meetings industry and CFIB (Canadian Federation of Independent Business)	New Experience Expo	Red Alert Go Live Together (www.golivetgether.com) Lobbying with government



Biggest upcoming challenges regarding employees

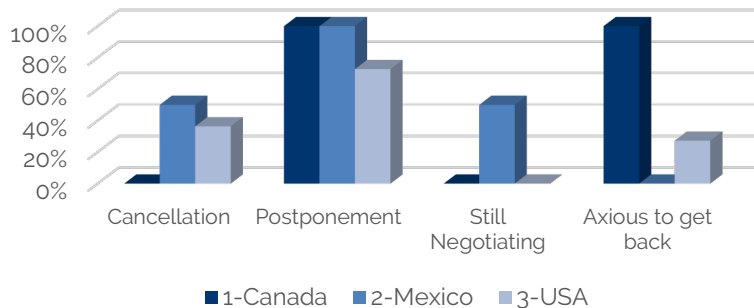


Ongoing cashflow

Lack of overall work within the country will leave our laid off employees without jobs
Time will tell how long employee loyalty will prevail before seeking other options outside of the industry



Customer reaction in case of postponements



In the US, reactions are across the board. Exhibitors want to attend but shows get cancelled.

Pre-build stands/ material use after postponement



In the US, storage is often included in the initial offer already, as source of income.



IFSS



SOUTH AMERICA

SOUTH AMERICA



2 participants

2.33%

Of total results



Countries



Inhabitants



Ø no. of daily
new infections



Ø R-factor

Argentina (1)

44.5 Mio.

12,625

0.93

Colombia (2)

50 Mio.

8

-

Exhibitions in 2020

- Argentina states to be back into business in full.
- In Colombia exhibitions are still not allowed to take place.

Status as of 30 Sept. 2020

Re-opening Date

In which quarter of 2021 do you expect to see exhibitions take place?



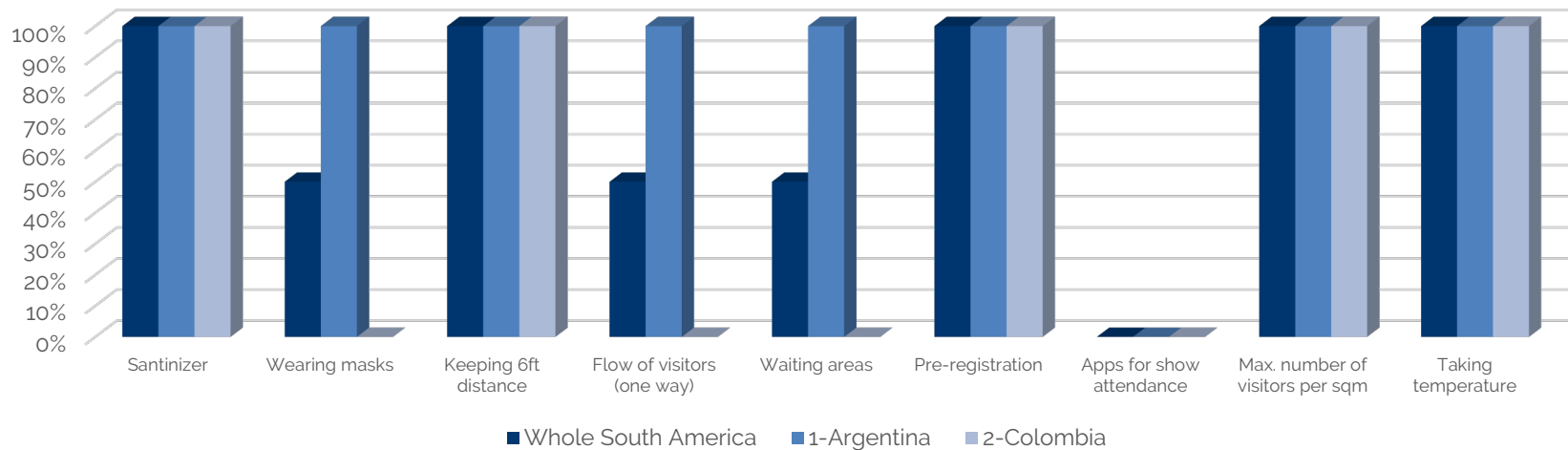
Status of 30 Sept. 2020, Argentina has not announced a re-opening date for exhibitions and Colombias currently planned date is in Q1 2021.

50% stated that all postponed/ planned shows for 2021 are likely to take place as planned. } 100% - Argentina

50% stated that some of the shows planned for 2021 have already been cancelled, but no more than a third of all 2021 shows. } 100% - Colombia

50% stated that so far, they have no business for 2021. } 100% - Argentina

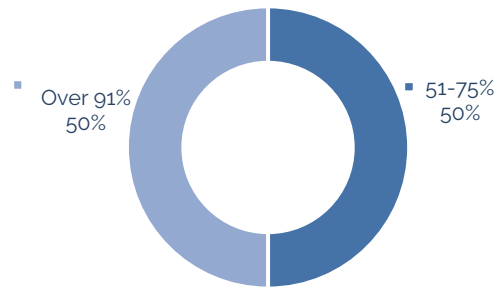
Hygiene concepts for re-opening of trade fairs



Documentation of measures (in Spanish):
<http://novedadesaoca.site/PDF/GUIADERECOMENDACIONESAOCA.pdf>

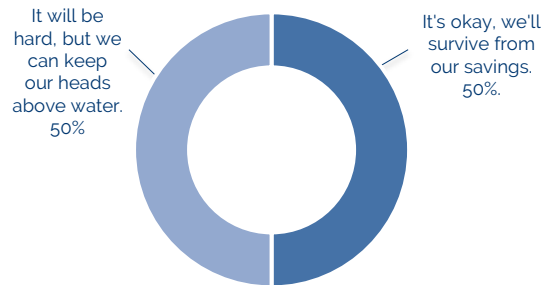


Drop in revenue as a Y/Y comparison to 2019



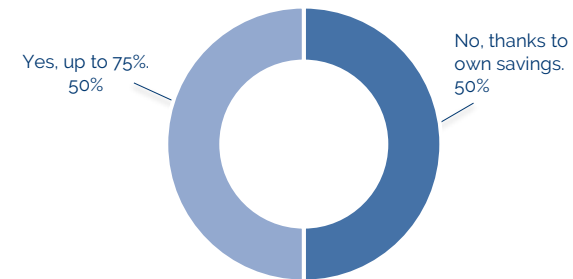
	26-50%	51-75%	76-90%	Over 91%
Argentina				100%
Colombia		100%		

In case of 6 additional months without business



	Other income	Savings	Close down	Heads up
Argentina				100%
Colombia		100%		

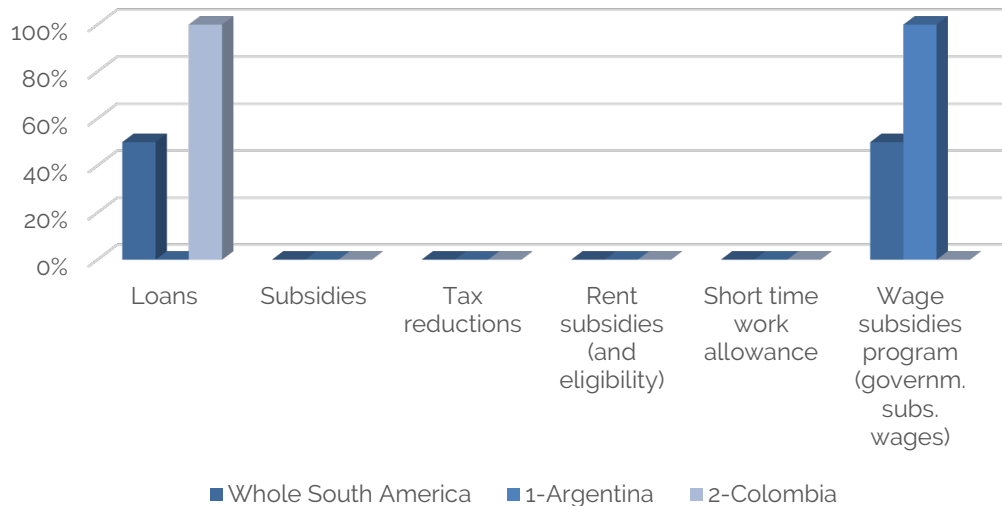
Have you already had to layoff employees?



	No. savings	Up to 10%	Up to 25%	Up to 50%	Up to 75%	Yes. min.
Argentina	100%					
Colombia					100%	



Government support for the live event industry



40% Wage subsidy

Products/services to maintain some level of revenue

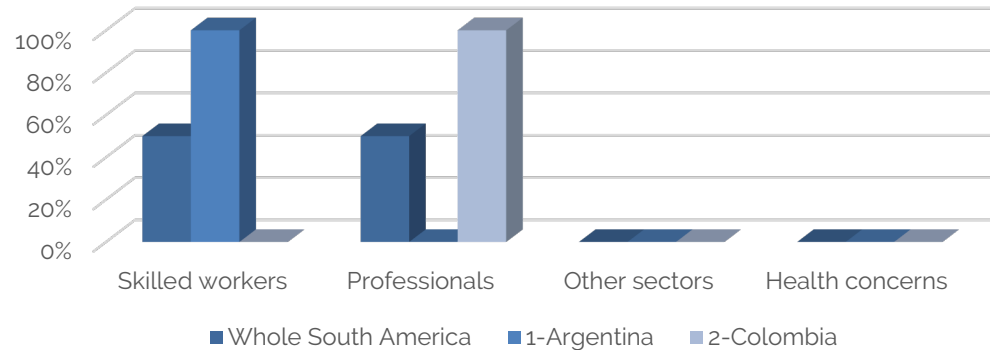
Argentina	Colombia
<ul style="list-style-type: none"> • CoVid prevention supply (% n/a) • Office renewal (% n/a) 	<ul style="list-style-type: none"> • Display (% n/a) • Virtual events (% n/a)

*Percentage figures represent the level of revenue of regular sales volume.

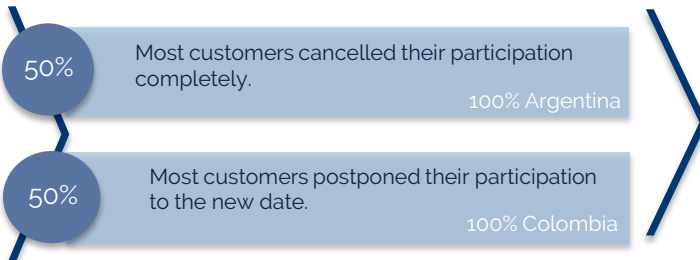
Initiatives to raise awareness for needs of live event industry

Argentina	Colombia
Some lobbying on social media (videos) Low visibility of the industry	None

Biggest upcoming challenges regarding employees



Customer reaction in case of postponements



Pre-build stands/ material use after postponement

