

UFI Global Exhibition Barometer

29th Edition

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



Global



India



Southern Africa



Japan



United Kingdom



Macau



Spain



Malaysia



Peru



Russian Federation



Central & South America



Singapore



South Korea



US



Mexico



Thailand



Argentina



Brazil



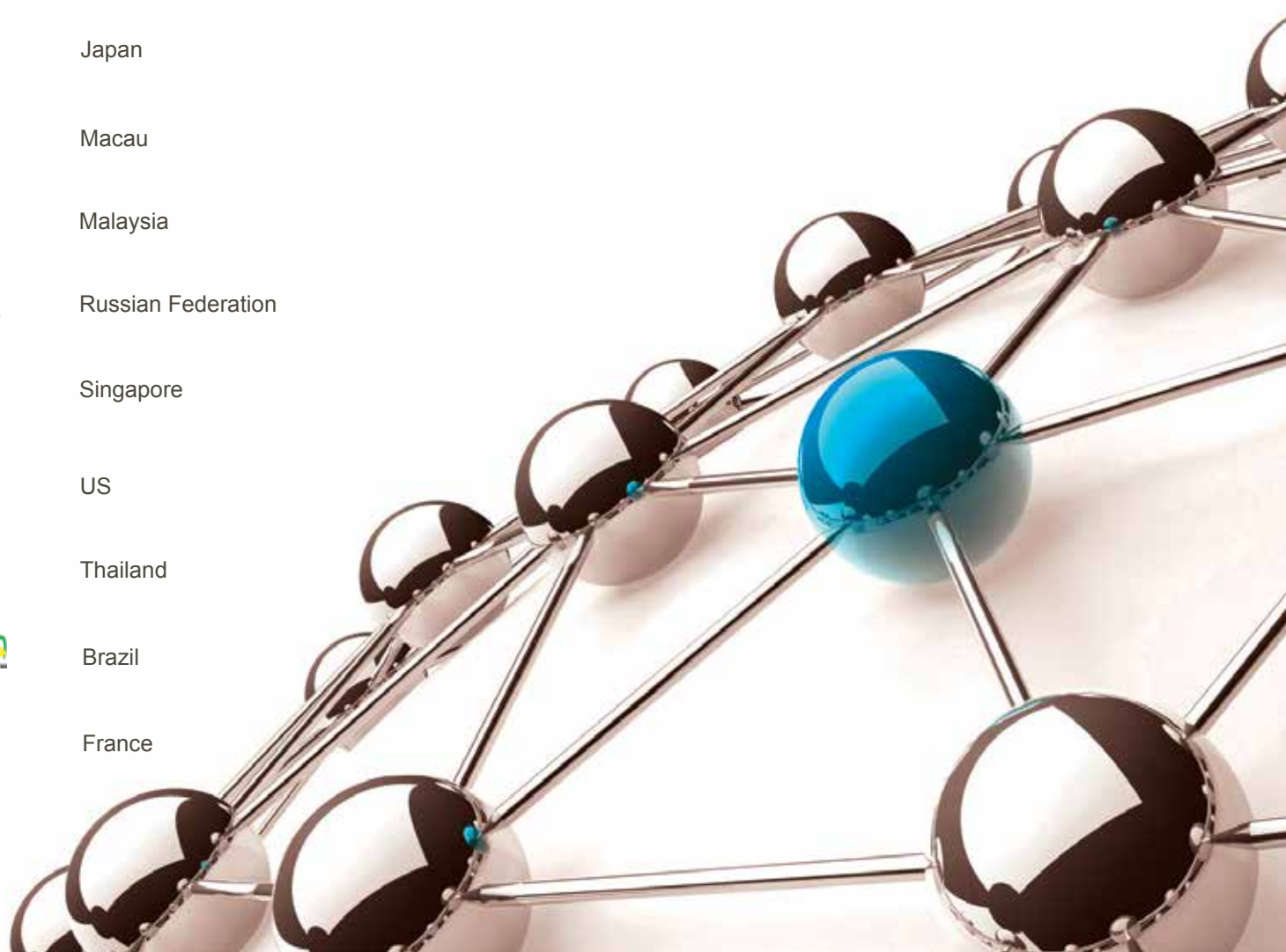
Indonesia



France



Australia



Global Reports



Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

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

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

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

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

Regional Reports



Regular market overviews on UFI's chapter regions.

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

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

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

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

Topical Reports



Focused reports on challenges and developments within the exhibition industry.

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

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

Best Practices Compendiums – Case studies of successful industry developments.

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

UFI Research Patron: Freeman¹

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



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Welcome to the 29th edition of the UFI Global Exhibition Barometer. This study is based on a global survey, conducted in June 2022, and provides the latest insights on the status and outlook of the exhibition industry – both globally, and within 28 specific markets and regions.

The first edition of the UFI Global Exhibition Barometer was launched as a response to the 2008 global financial crisis, and this latest edition builds on those released over the past 18 months to create an overall assessment on the impact of another global crisis – the COVID-19 pandemic – on the exhibition industry, as well as providing projections for the future.

The Barometer has a truly global reach, with 366 companies participating from 57 countries and regions. We wish to thank the participation of the following associations for making this global collaboration possible:

AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa; AEO (Association of Event Organisers) in the UK; AFE (Spanish Trade Fairs Association) in Spain; AFEP (Asociación de Ferias del Peru) in Peru; AFIDA (Asociación Internacional de Ferias de América) in Central 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; AOCA (Asociación Argentina de Organizadores y Proveedores de Exposiciones, Congresos, Eventos y de Burós de Convenciones) in Argentina; EEAA (The

Exhibition and Event Association of Australasia) in Australasia; IECA/ASPERAPI (Indonesia Exhibition Companies Association) in Indonesia; IEIA (Indian Exhibition Industry Association) in India; JEXA (Japan Exhibition Association) in Japan; MFTA (Macau Fair & Trade Association) in Macau; MACEOS (Malaysian Association of Convention and Exhibition Organisers and Suppliers) in Malaysia; RUEF (Russian Union of Exhibitions and Fairs) in Russia; SECB (Singapore Exhibition & Convention Bureau) in Singapore; SISO (Society of Independent Show Organizers) in the US; TEA (Thai Exhibition Association) in Thailand; UBRAFE (União Brasileira dos Promotores Feiras) in Brazil; and UNIMEV (French Meeting Industry Council) in France.

Important remarks

- The survey replies (a total of 366 from 57 countries and regions; see full list at the end of this document) offer representative results. However, given the consolidated regional results may not reflect the situation of specific countries in that region; the Barometer also includes detailed results for the 23 markets where a significant number of answers were obtained.
- Due to decimal rounding, the percentage values indicated in some charts may not sum up to exactly 100%. This applies, in particular, to the charts related to public financial support.

Any questions about the Barometer can be sent to research@ufi.org

This research document is available online at www.ufi.org/research

The 29th Barometer surveyed participants' monthly operations from January 2022, to qualify their level of activity as "normal", "reduced" or "no activity". It also gauged their predicted level of activity for the period up until December 2022.

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

By June 2022, most markets (with some exceptions in Asia) had reopened for both national and international events, and the level of operations appears to be gradually improving throughout the world.

In particular:

- the proportion of companies declaring "normal activity" increased from 30% in January to around 70% between September and December
- in parallel, the proportion of companies expecting "no activity" dropped from 29% to 8% during the first half of the year, and only 6% of companies expect no activity by the end of 2022.

In many markets, the majority of companies started seeing a normal level of activity in March, although several countries around the world reopened earlier, including Australia, Brazil, Saudi Arabia, Spain, Turkey, the UAE and the UK.

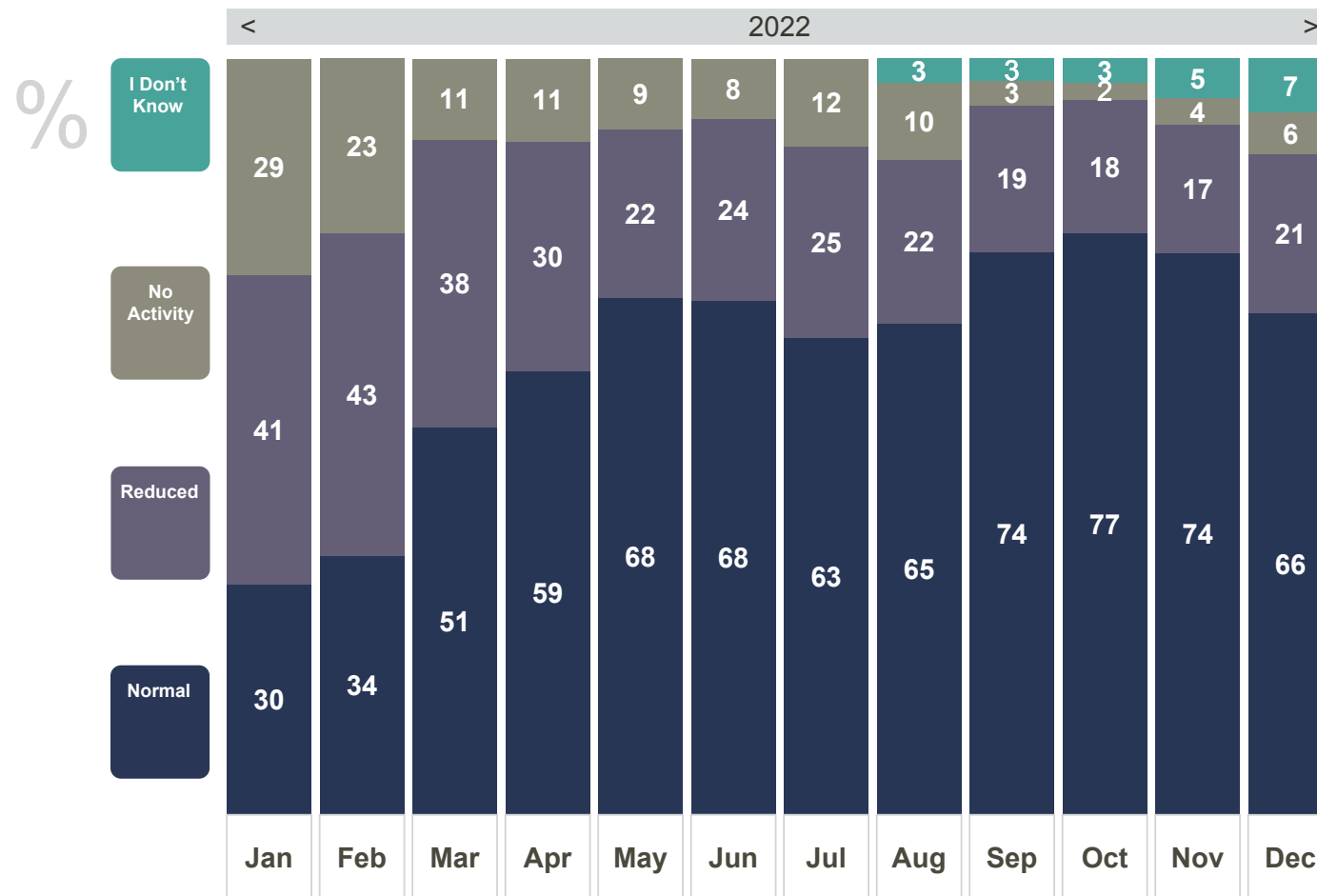
In Asia however, markets only started reopening in May, and some markets are yet to reopen (China is expected to reopen in October, while Hong Kong may be next year).

When asked what elements would best support the "bounce-back" of exhibitions, six in ten companies selected "Lifting of current travel restrictions" and "Readiness of exhibiting companies and visitors to participate again". "Financial incentive packages (leading to reduced costs for the exhibitors)" and "Lift of current public policies that apply locally to exhibitions" are the next two most influential key drivers, mentioned selected by four in ten and three in ten companies respectively.

"Mid-term visibility in terms of public policies, including travel restrictions" ranked higher in several markets, particularly in the Asia-Pacific region.

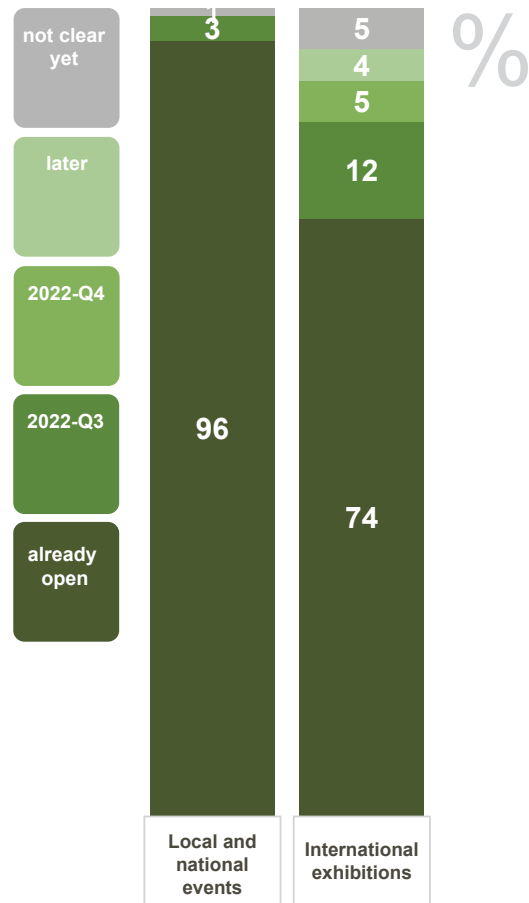


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

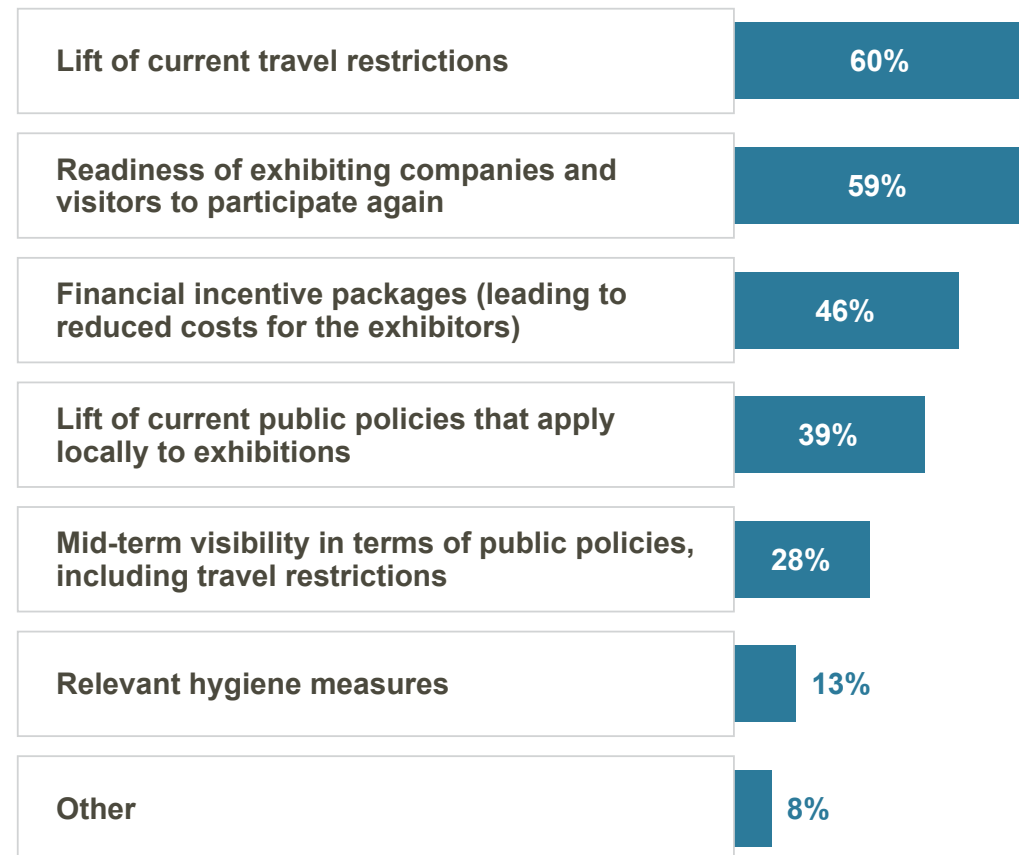




When do you believe exhibitions will open again in your city?



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



The 29th Barometer asked participants for their company's predicted gross turnover for 2022, as well as their expectations for the first half of 2023, compared to 2019. The survey also sought insights on the evolution of operating profits for 2022, compared to the same period in 2019.

The following charts present:

- revenues from 2022, and projections for the first half of 2023, compared to 2019, on average for all companies, and also broken down per level of revenue realised (0% compared to revenues of 2019, less than 25%, etc.)
- the evolution of 2022 operating profits, compared to those for 2019.

Globally, and on average, companies have seen a significant increase in their 2022 turnover, which now represents 73% of 2019 levels. They also project this to increase to 87%, taken like-for-like for the first half of 2023.

Many countries are performing well above average.

In particular:

- for 2022 revenues, the UK (89% of 2019 levels), Italy (86%), Saudi Arabia (85%), Turkey and South Korea (82%) and Japan (80%) have all recorded positive results.

- directly contrasting results from Hong Kong (34% of 2019 levels), China and South Africa (both at 57%) and Malaysia (59%).
- for projected revenues for the first half of 2023, most markets are expecting at least 75% of 2019 levels. Only Hong Kong (58%), China (69%) and South Africa (72%) expect lower levels.

In terms of operating profit for 2022, 10% of companies globally are expecting a loss, and 15% are expecting a reduction of more than 50%, compared to 2019 levels.

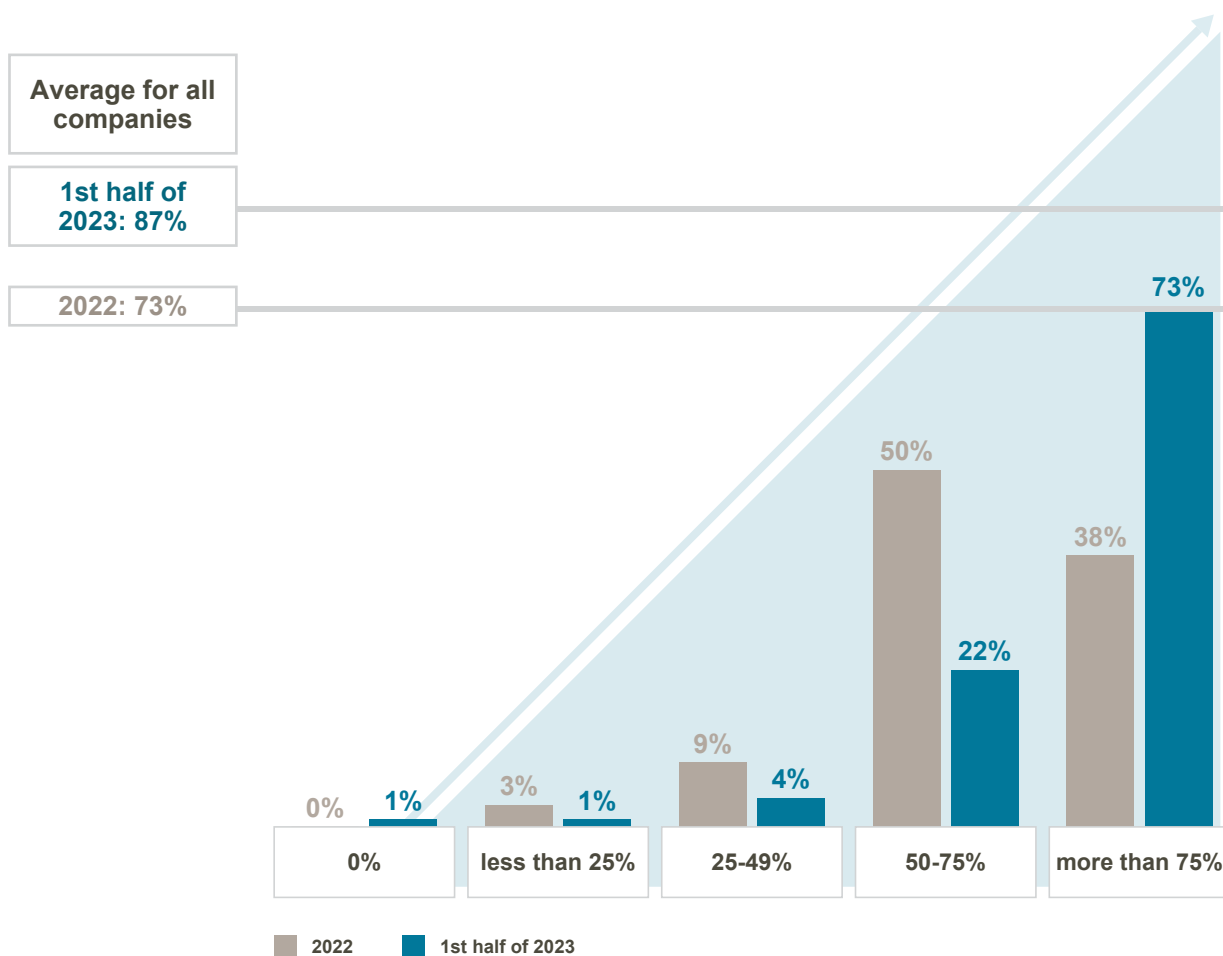
Several regions include countries with a higher-than-average proportion of companies foreseeing a loss in 2022.

In particular:

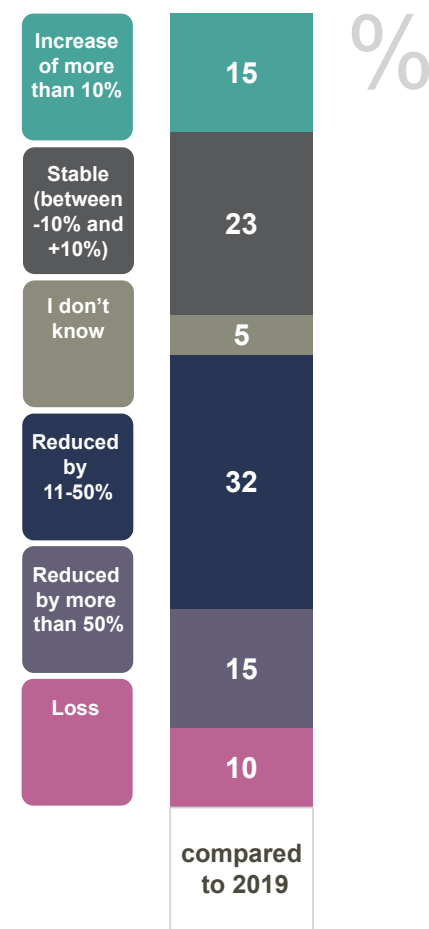
- Brazil (13%) in Central and South America
- Germany (15%) and Italy (13%) in Europe
- Australia (14%), China (21%), Hong Kong (20%), India (17%), Singapore (20%), South Korea (11%) and Thailand (40%) in the Asia-Pacific.



Revenue compared to 2019



Operating Profits 2021



The 29th Barometer surveyed the impact of public financial support in response to the COVID-19 crisis. Overall, 73% of companies received no public financial support, and for the majority of those that did, financial public aid represented less than 10% of their overall costs.

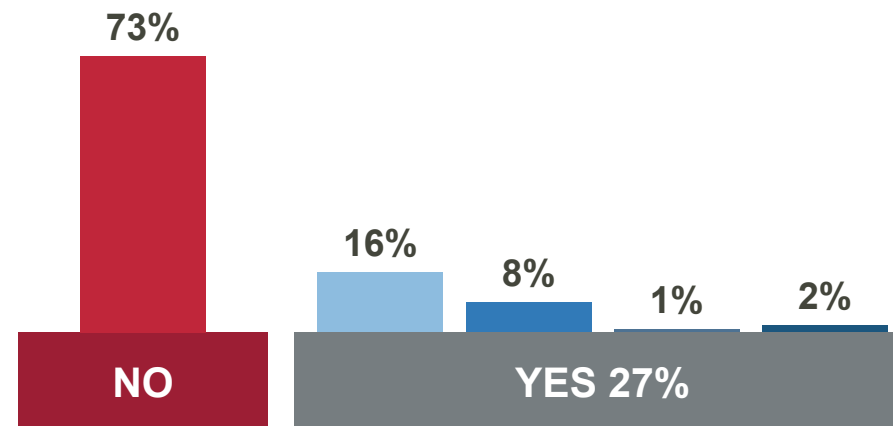
Asia-Pacific and Europe saw the highest proportions of companies receiving public financial support (37% and 35% respectively). In all regions, there are significant differences across markets, as illustrated by the following percentage ranges for companies declaring they received “no public support”:

- from 10% in Hong-Kong to 92% in India, in Asia-Pacific
- from 38% in Germany to 86% in Turkey, in Europe
- from 58% in Colombia to 100% in Chile, in Central and South America
- from 69% in Saudi Arabia to 100% in the UAE, in the Middle East and Africa.



Did your company benefit from public financial support?

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



The 29th Barometer asked companies to select the most important issues for their business in the coming year, from a pre-defined list of eight issues. Multiple-choice answers were possible, to gain further insights for certain issues.

The latest results show significant variations from the previous edition of the Barometer, released in the February 2022. In particular, the “Impact of the COVID-19 pandemic on the business” has dropped from being the most pressing issue, to the sixth-most pressing (from 19% down to 11%).

Currently, the most pressing business issue is “Internal management challenges” (20% of respondents, compared to 19% in the previous edition). There has also been a shift in the second- and third-most pressing issues, with “Impact of digitisation” (17% of respondents, compared to 16% in the previous edition) moving from third to second, and “Competition with other media” (15%, compared to 14% in the previous edition), moving from fourth to third.

Within “Internal management challenges”, 64% of respondents selected “Human resources” issues, 45% selected “Business model adjustments”, and 39% selected “Finance”.

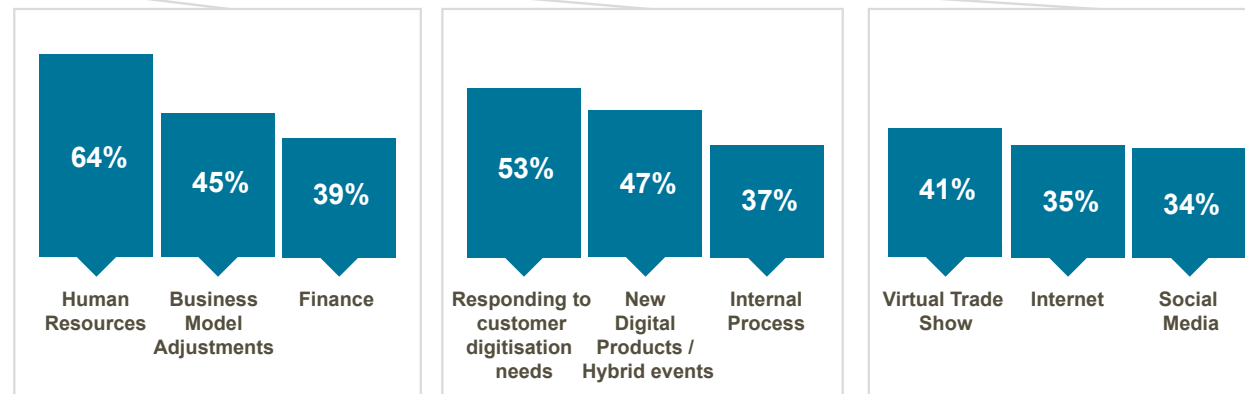
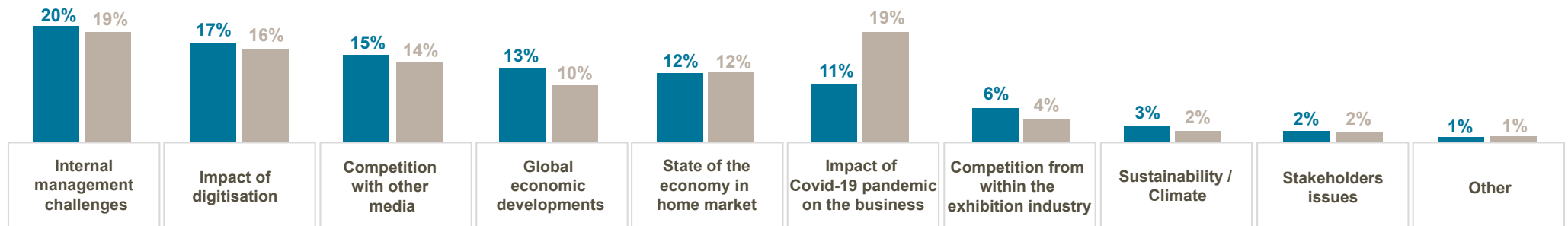
“Internal management challenges” represents the key business issue across all regions, and it is the most vocalised issue for most markets.

Some differences can be seen in relation to “Impact of digitisation”, which is the most pressing issue in Colombia (24%) and Germany, Malaysia and Thailand (20%), while “Impact of the COVID-19 pandemic on the business” remains the most important issue in China (21%) and Hong Kong and Japan (20%).

An analysis per industry segment (organiser, venue and service provider) shows no differences with regard to the three most pressing issues, which remain “Internal management challenges”, “Impact of digitisation” and “Competition with other media”.

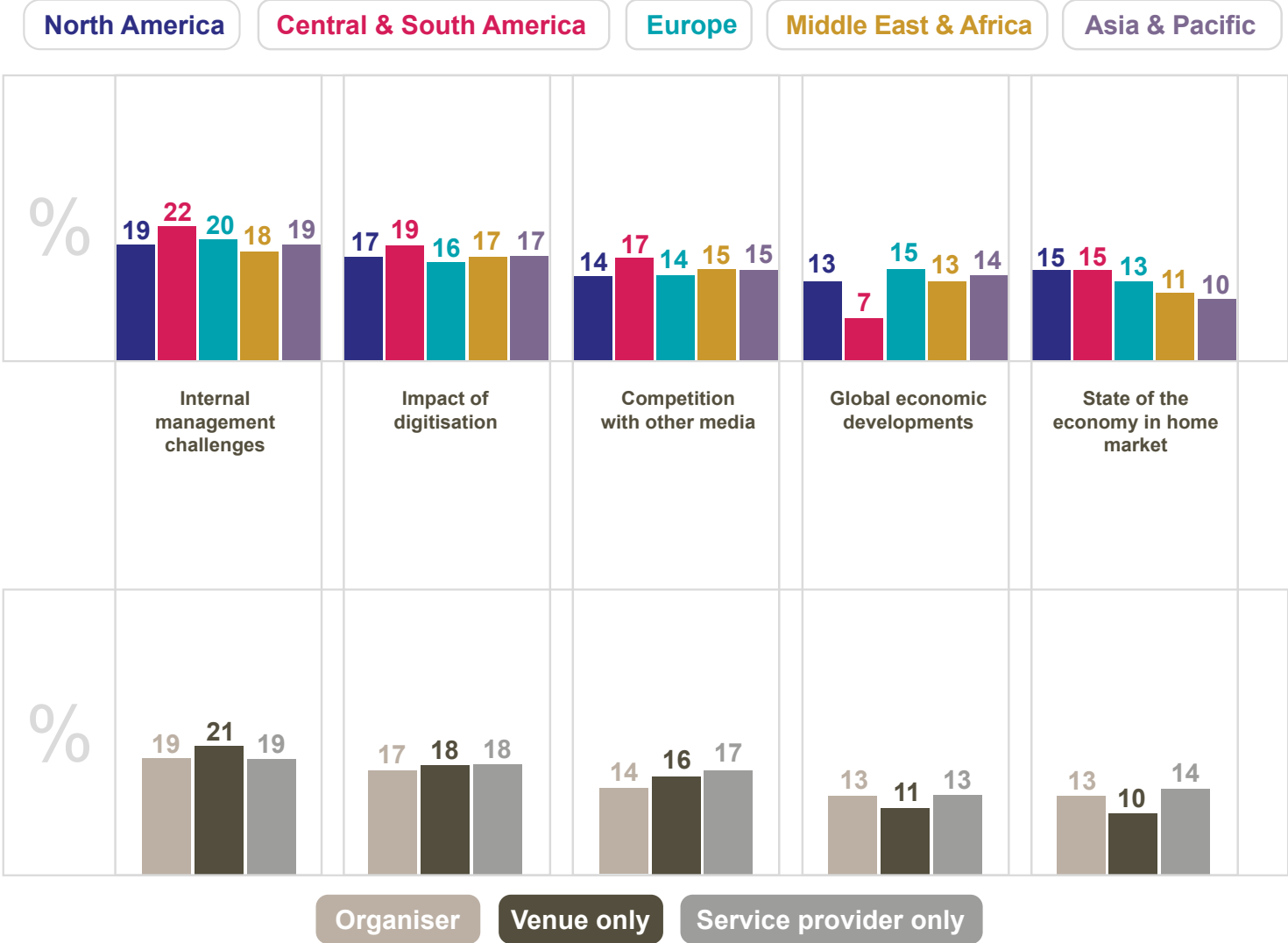
Results from previous survey - January 2022

Results from current survey - June 2022



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

Actions put in place



The 29th Barometer sought insights into possible trends that will drive the future format of exhibitions, by asking companies to assess four different statements. By using the same question as in previous editions of the Barometer, some useful comparisons can be drawn.

The results are similar across regions, with the exception of a significantly higher proportion of companies (35%) being unsure that “Virtual events are replacing physical events” in Central and South America.

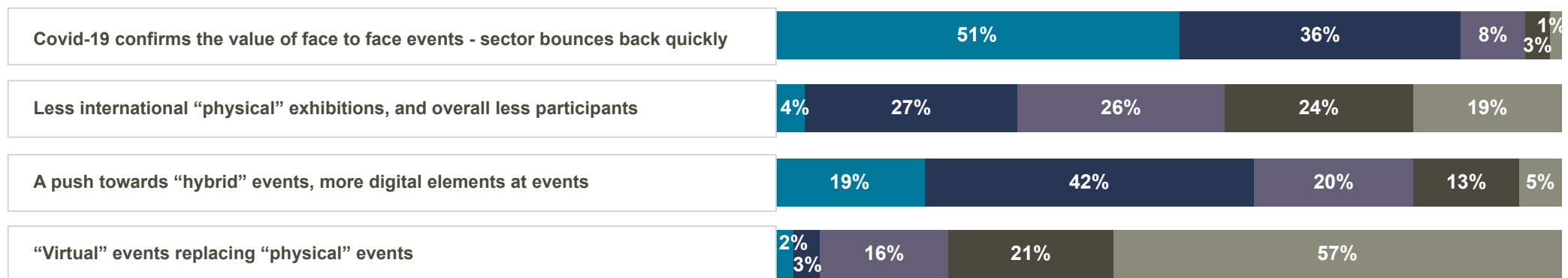
The global results indicate that:

- 87% of respondents (up from 80% in the previous edition, and 78% in the edition prior to that) agree that “COVID-19 confirms the value of face-to-face events”, and anticipate the sector to bounce back quickly (with 51% stating “Yes, for sure” and 36% stating “Most probably”).
- 31% (compared to 44% and 46% previously) believe there will be “Less international ‘physical’ exhibitions and, overall, less participants” (with 4% stating “Yes, for sure”, 27% stating “Most probably” and 26% remaining unsure).
- 61% (compared to 73% and 76% previously) believe there is “A push towards hybrid events, more digital elements at events” (with 19% stating “Yes, for sure”, 42% stating “Most probably” and 20% remaining unsure).
- 6% (compared to 10% and 14% previously) agree that “Virtual events are replacing physical events”, while 16% are unsure and 57% stating “Definitely not”.



Format of exhibitions in the coming years

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



Considering the strong focus on the digitisation of products and services during the pandemic, the 29th Barometer looked at the state of digital activity in the exhibition industry. The following pages show the global results, followed by detailed results per region and industry segment.

Overall, 65% of respondents have added digital services/products (such as apps, digital advertising and digital signage) to their existing exhibition offerings. This is especially the case in Asia-Pacific (71%).

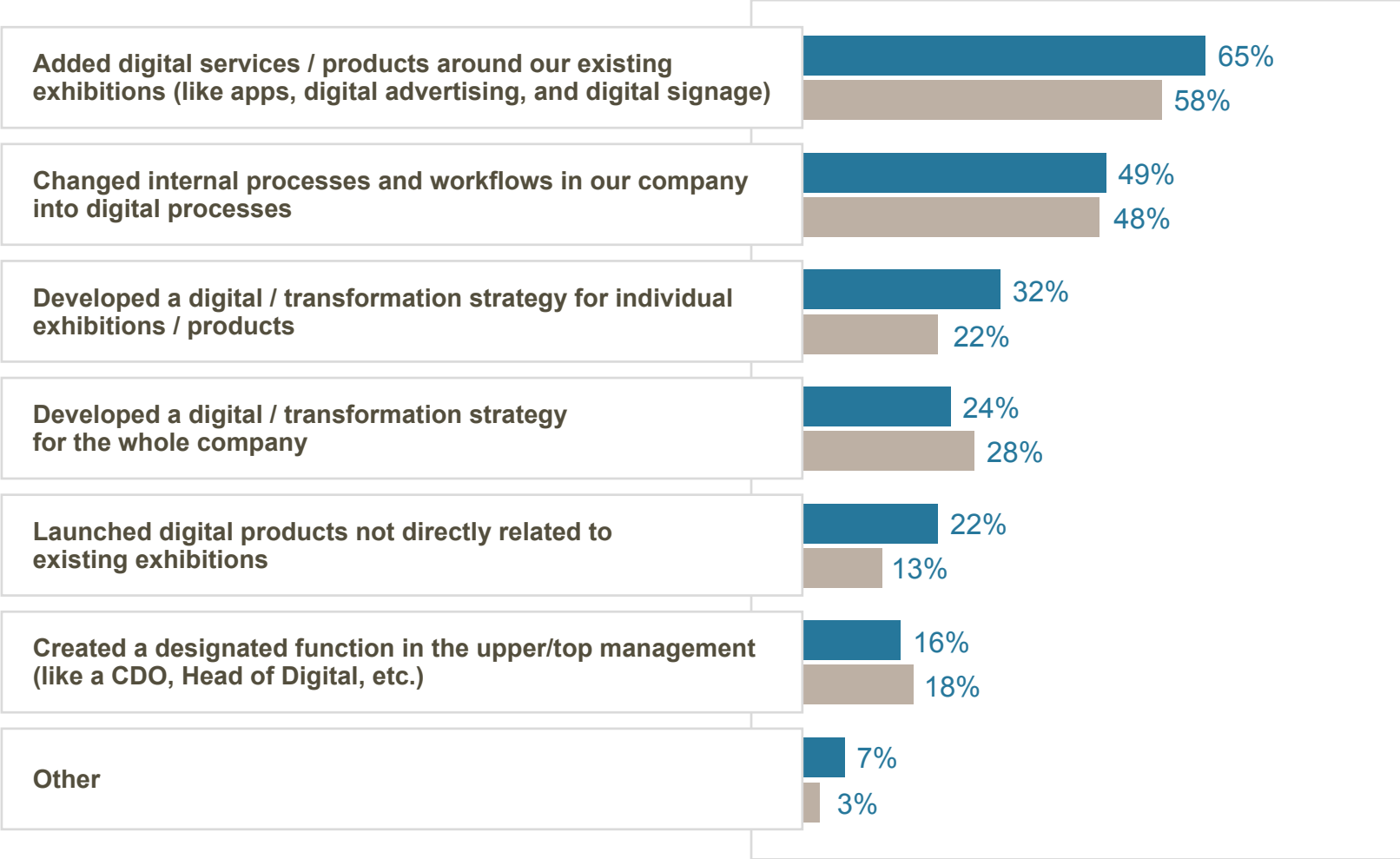
In addition, while 49% of respondents globally indicated they have digitised internal processes and workflows, this number was higher in the Middle East and Africa (62%) and Europe (55%).

While 32% of respondents globally stated that they have developed a digital or transformation strategy for exhibitions and products, this number was higher in Central and South America (38%).

Overall, 24% reported they have developed a digital transformation strategy for the whole company, and 22% have launched digital products not directly related to existing exhibitions. On average, 16% have created a designated function for digital (e.g. Chief Digital Officer) within senior management.

Results from previous survey - June 2019

Results from current survey - June 2022



The 29th Barometer surveyed companies' need to recruit additional staff following the restart of activities after COVID-19, and sought to gain insight into their most successful approaches.

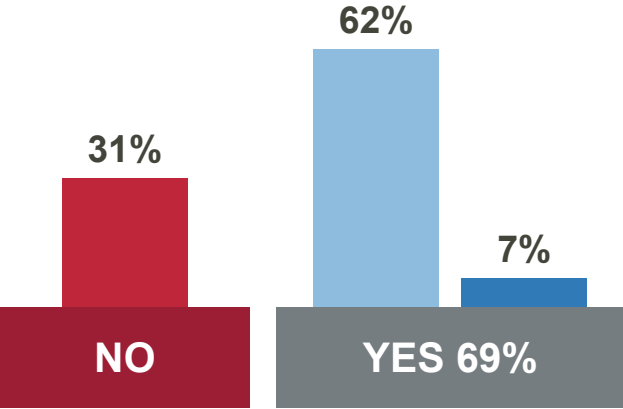
Globally, 69% of companies are currently in the process of recruiting more staff, and 62% are facing difficulties with sourcing appropriate candidates.

In all regions, most companies are currently recruiting more staff, while at the national level, China is the only country where most companies are not recruiting.

When asked about their most successful recruitment approach most companies said they either look for talent within their own networks, or through platforms such as LinkedIn.

HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



Part 2: Detailed results for 5 regions and 23 markets

North America:

Mexico
US

Central & South America:

Argentina
Brazil
Chile
Colombia

Europe:

Germany
Italy
Spain
Turkey
United Kingdom

Middle East & Africa:

Saudi Arabia
UAE
South Africa

Asia-Pacific:

Australia
China
Hong Kong
India
Japan
Malaysia
Singapore
South Korea
Thailand

North America



Operations - Reopening Exhibitions North America

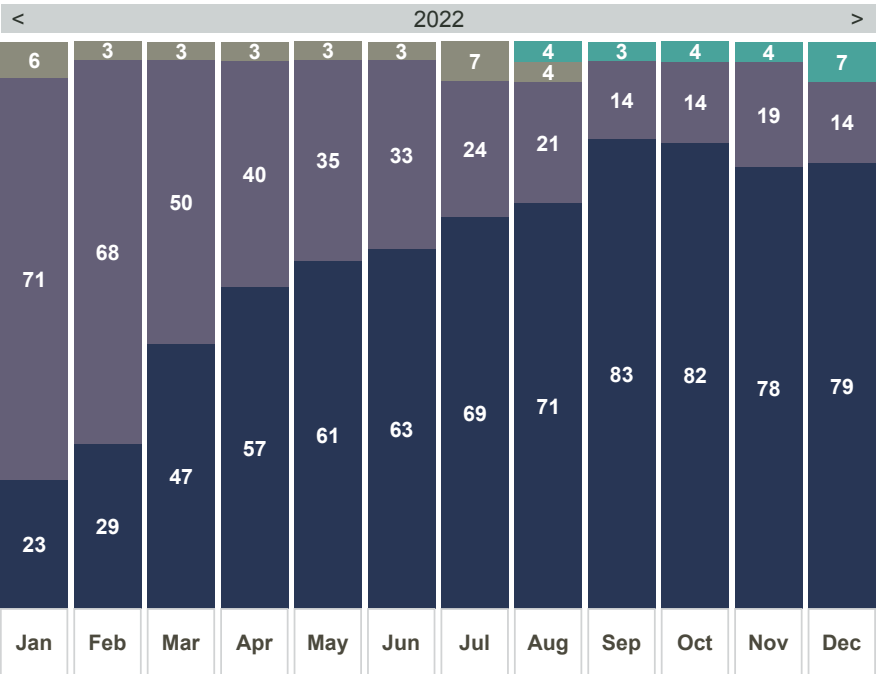


Situation of the industry operations for the 1st half of 2022, and current predictions for the 2nd half of 2022

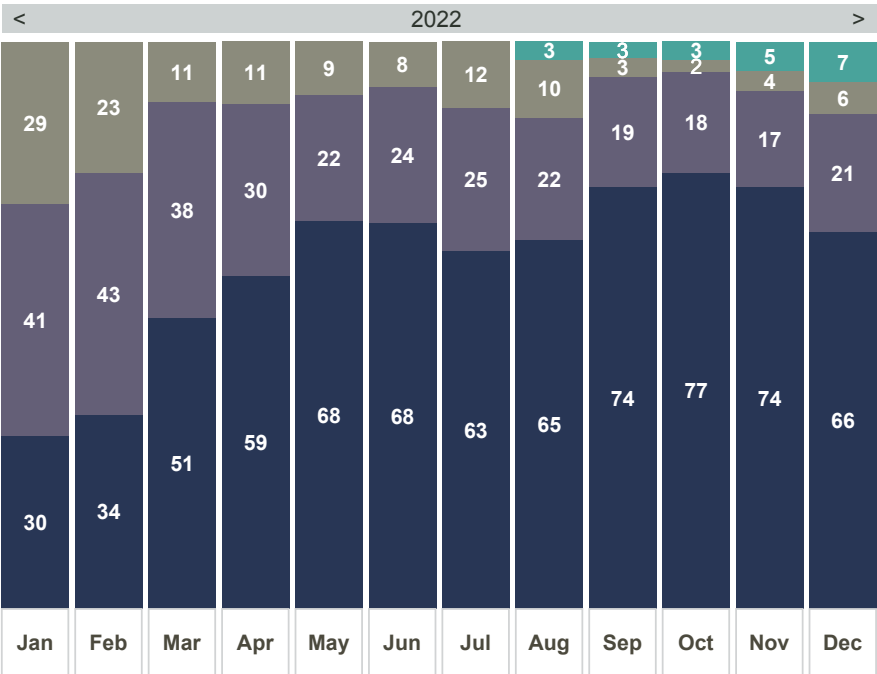


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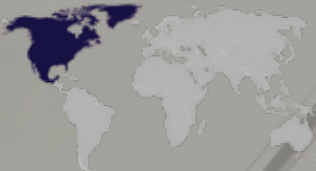
North America



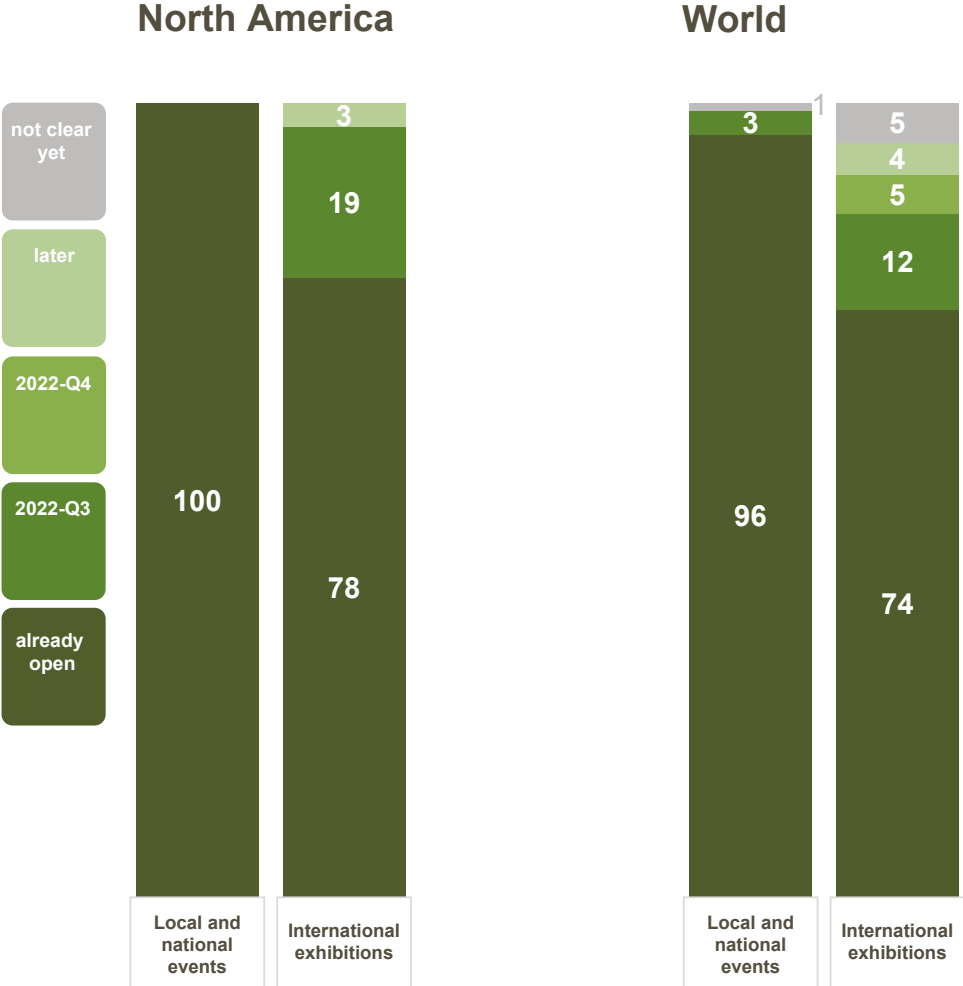
World



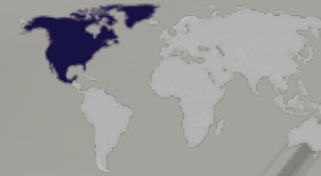
Operations - Reopening Exhibitions North America



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

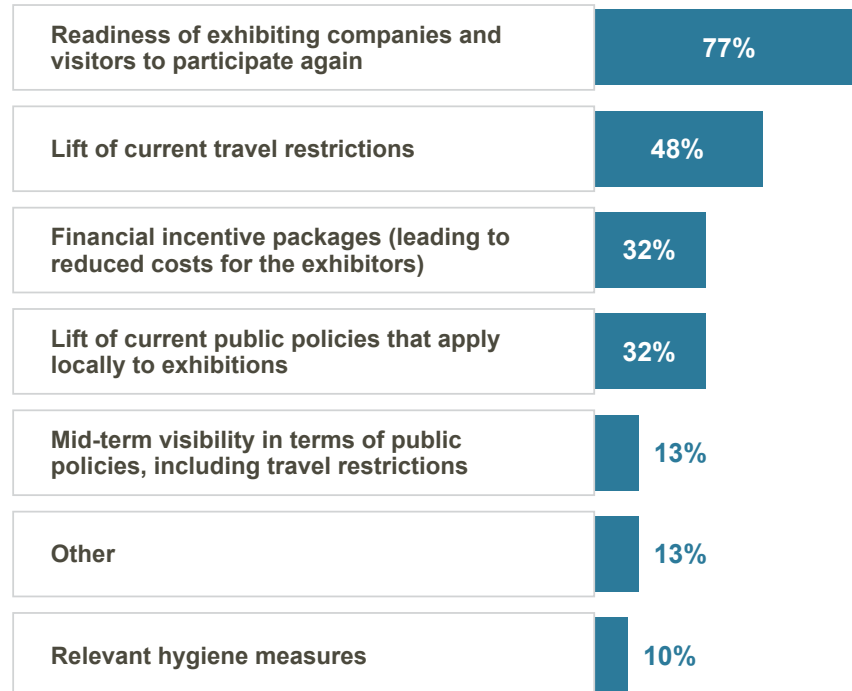


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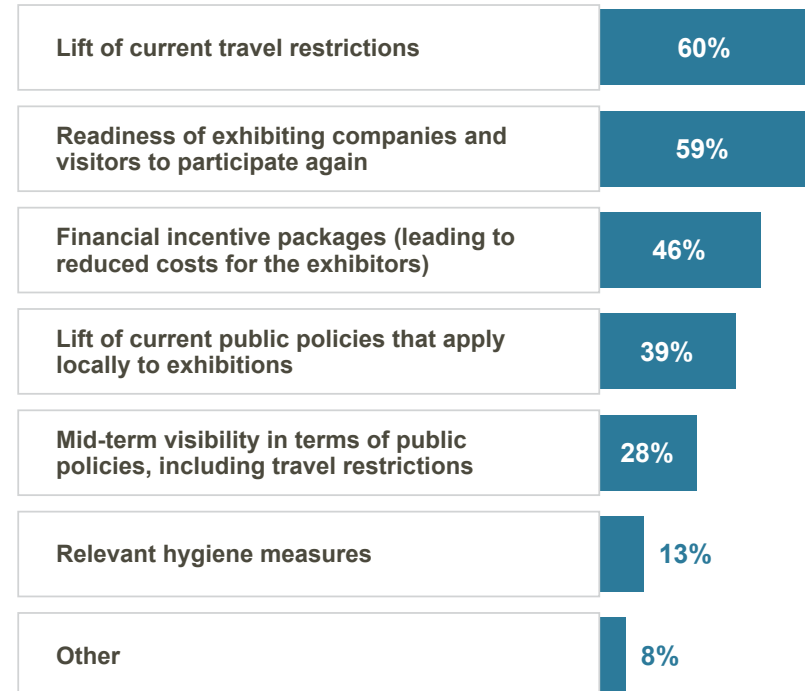


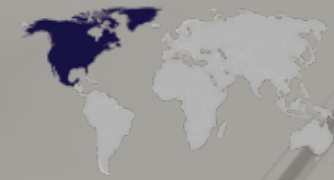
What do you believe would most help the “bounce back” of exhibitions?

North America



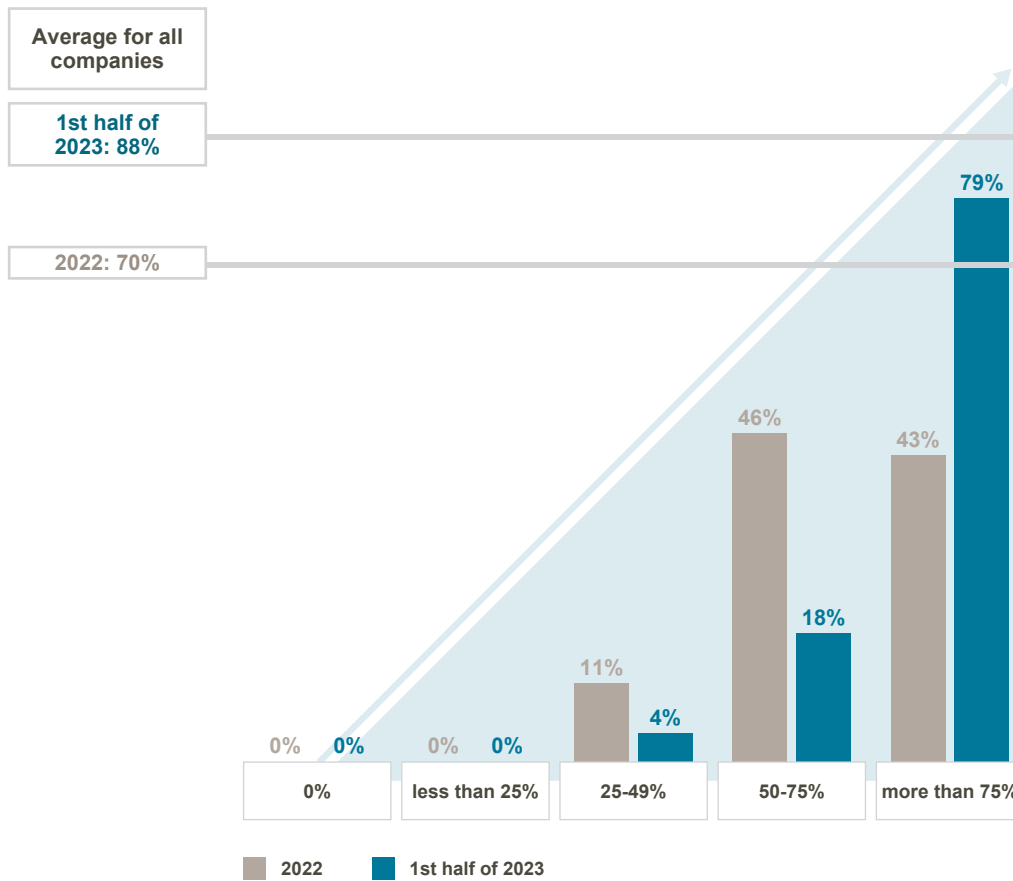
World



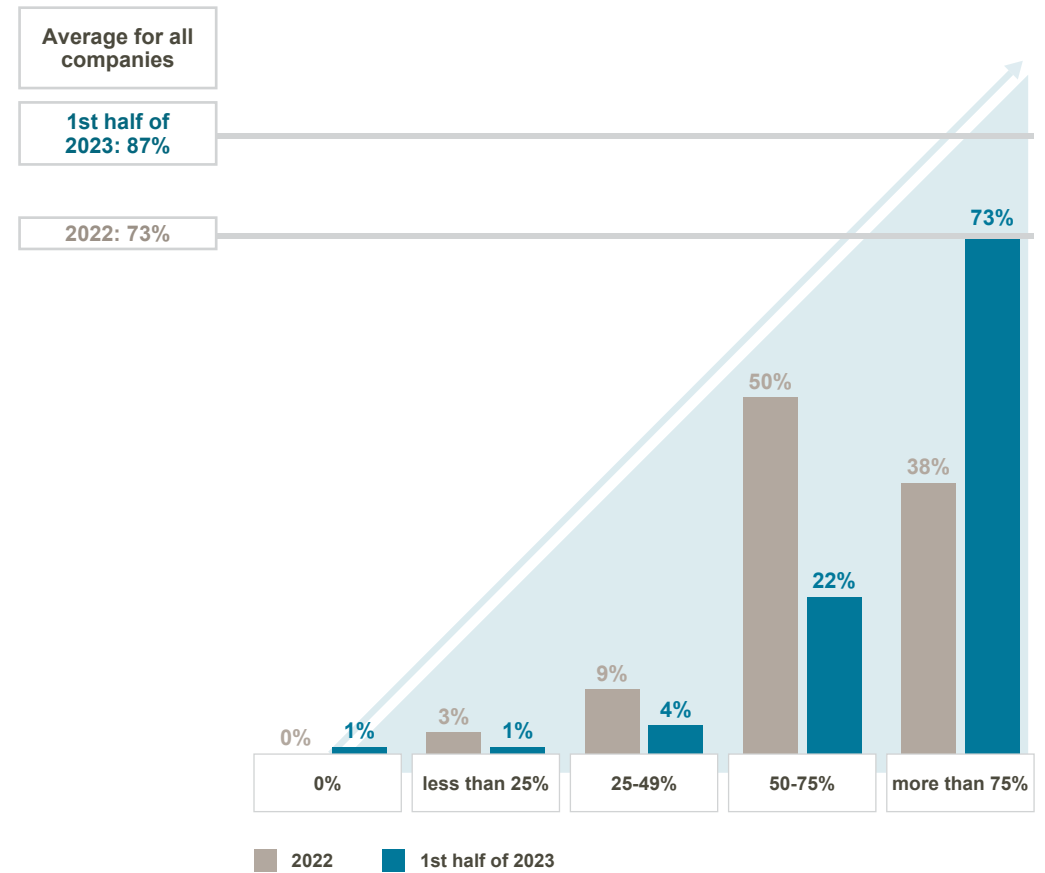


Revenue compared to 2019

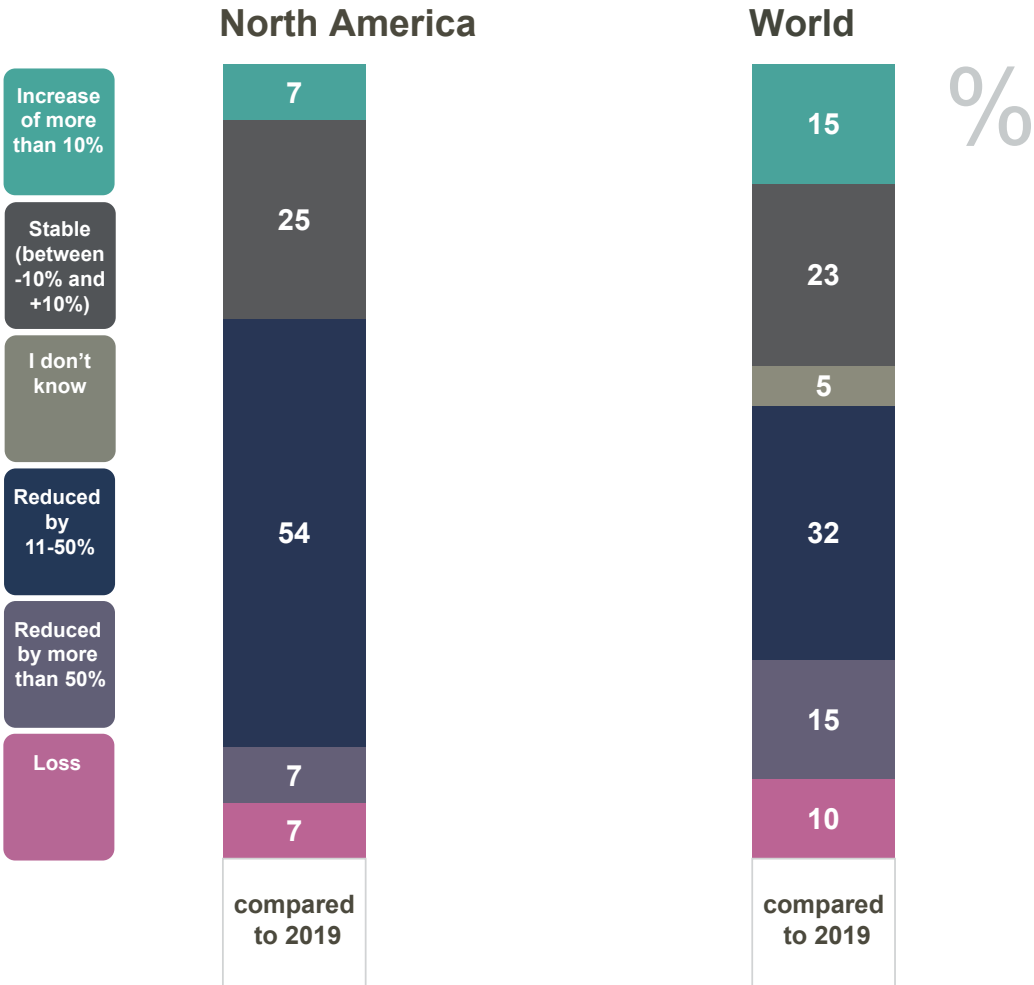
North America



World



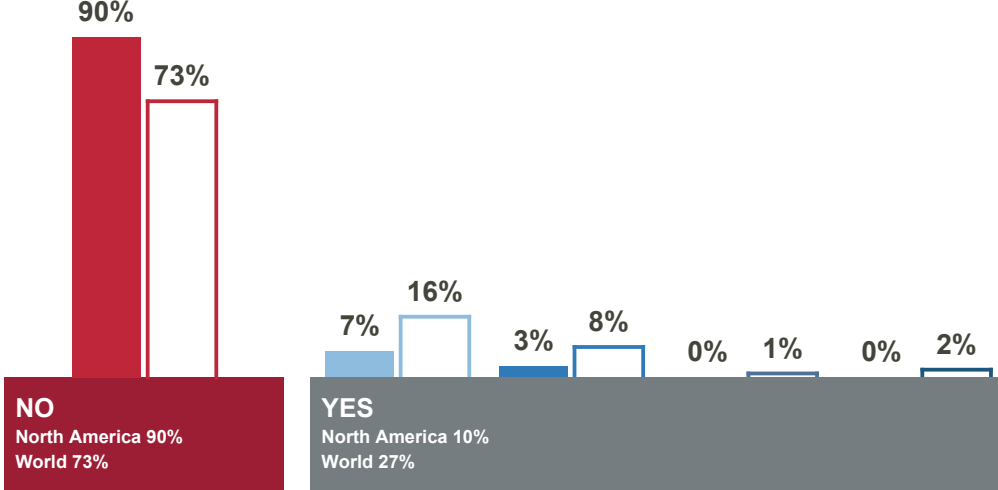
Operating Profits 2022 North America



Did your company benefit from public financial support?

North America World

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

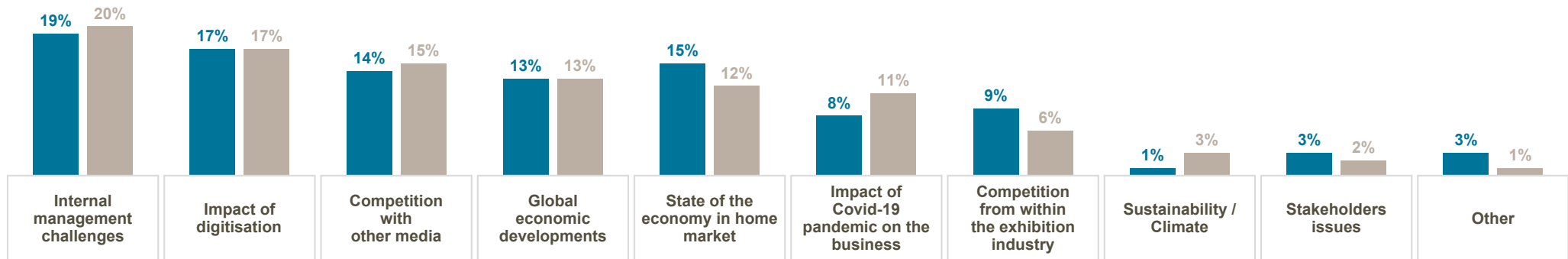


Most Important Business Issues - Format of Exhibitions - North America



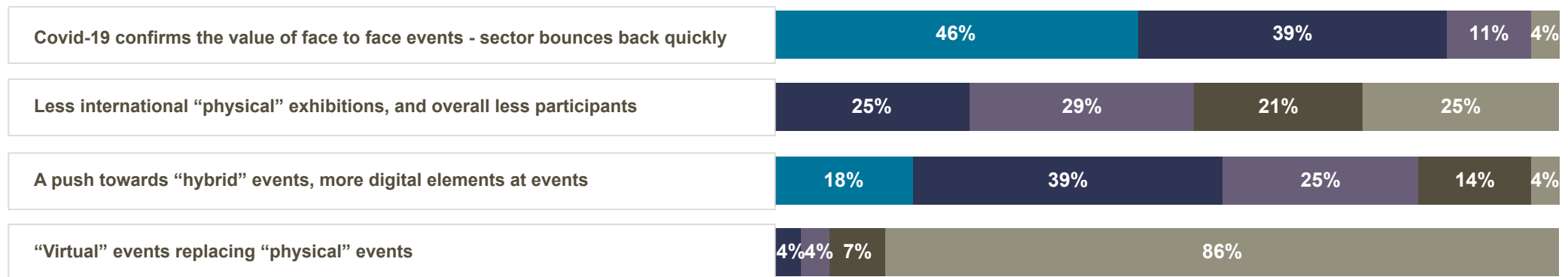
Most important business issues in the exhibition industry

North America Global



Format of exhibitions in the coming years

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

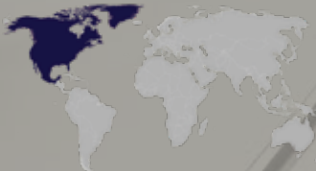


Digitisation: implementation in North America and globally

North America

Global

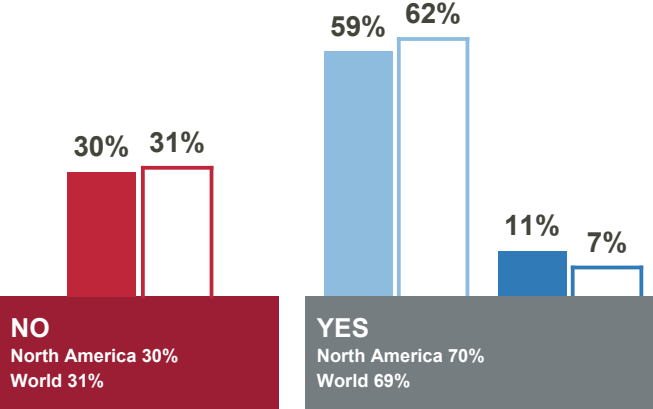




HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

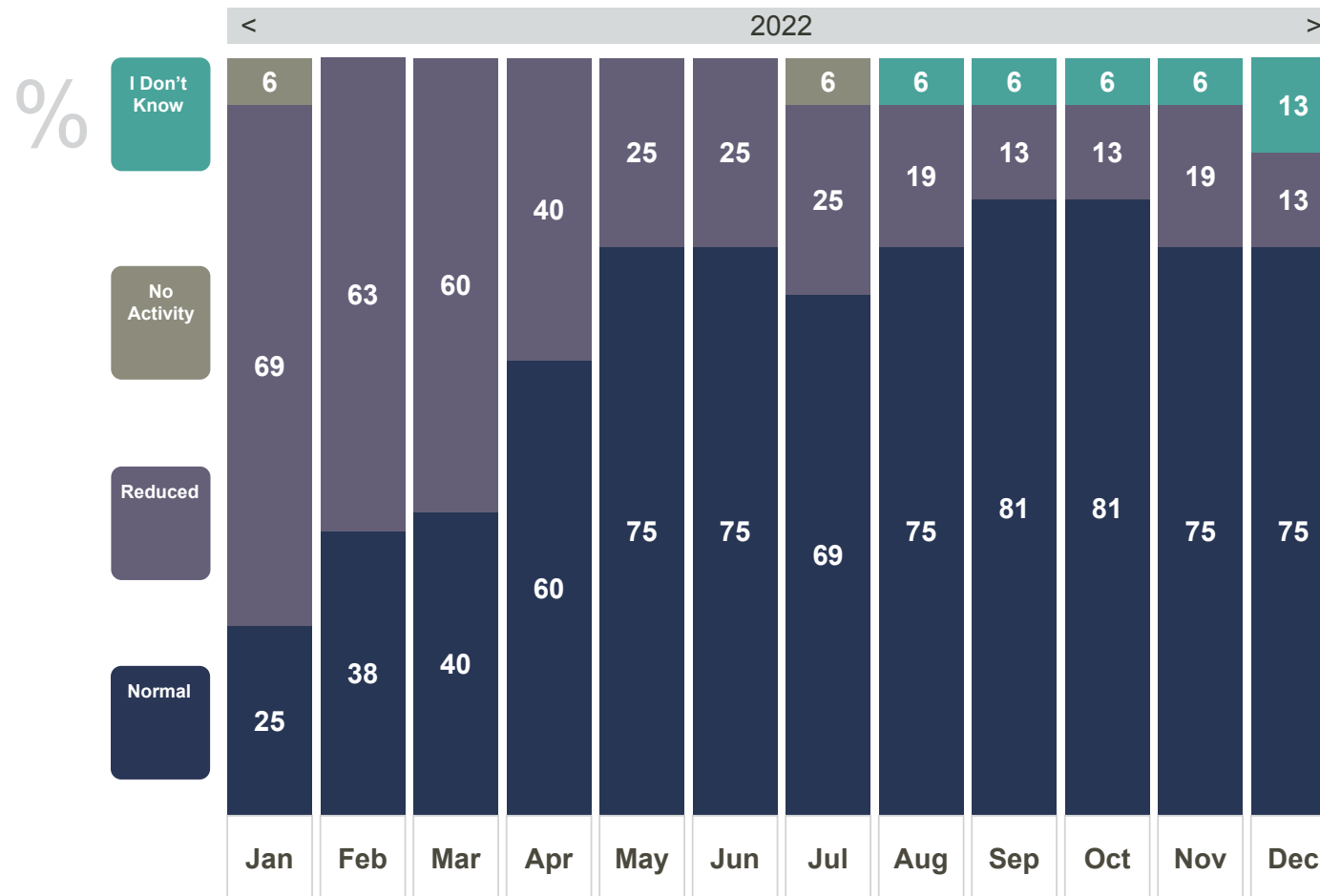
North America World

- No
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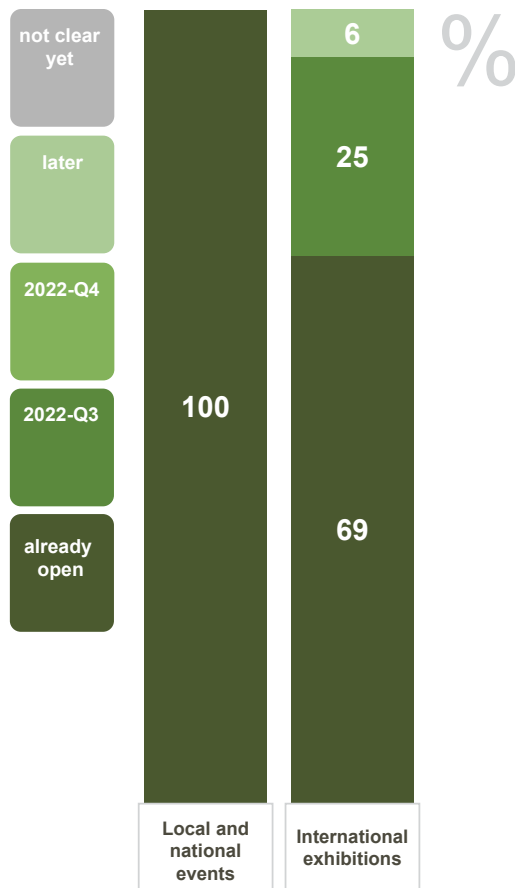


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

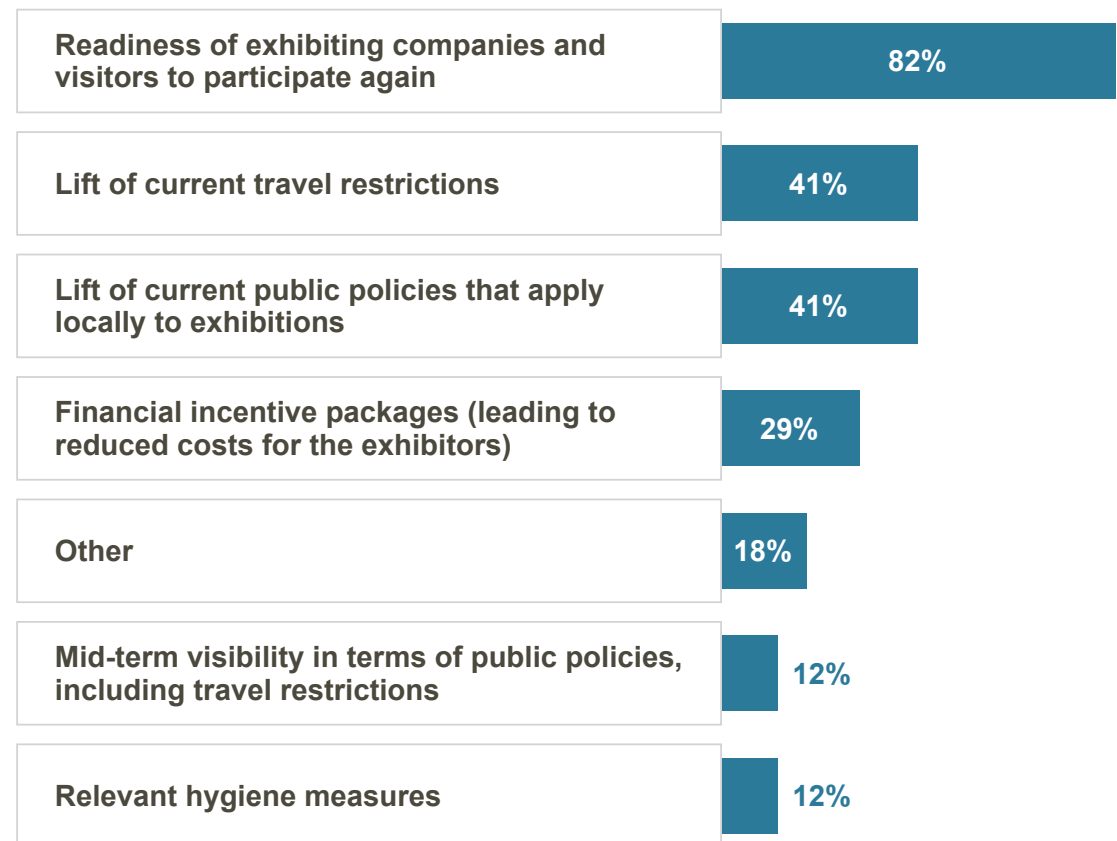




When do you believe exhibitions will open again in your city?

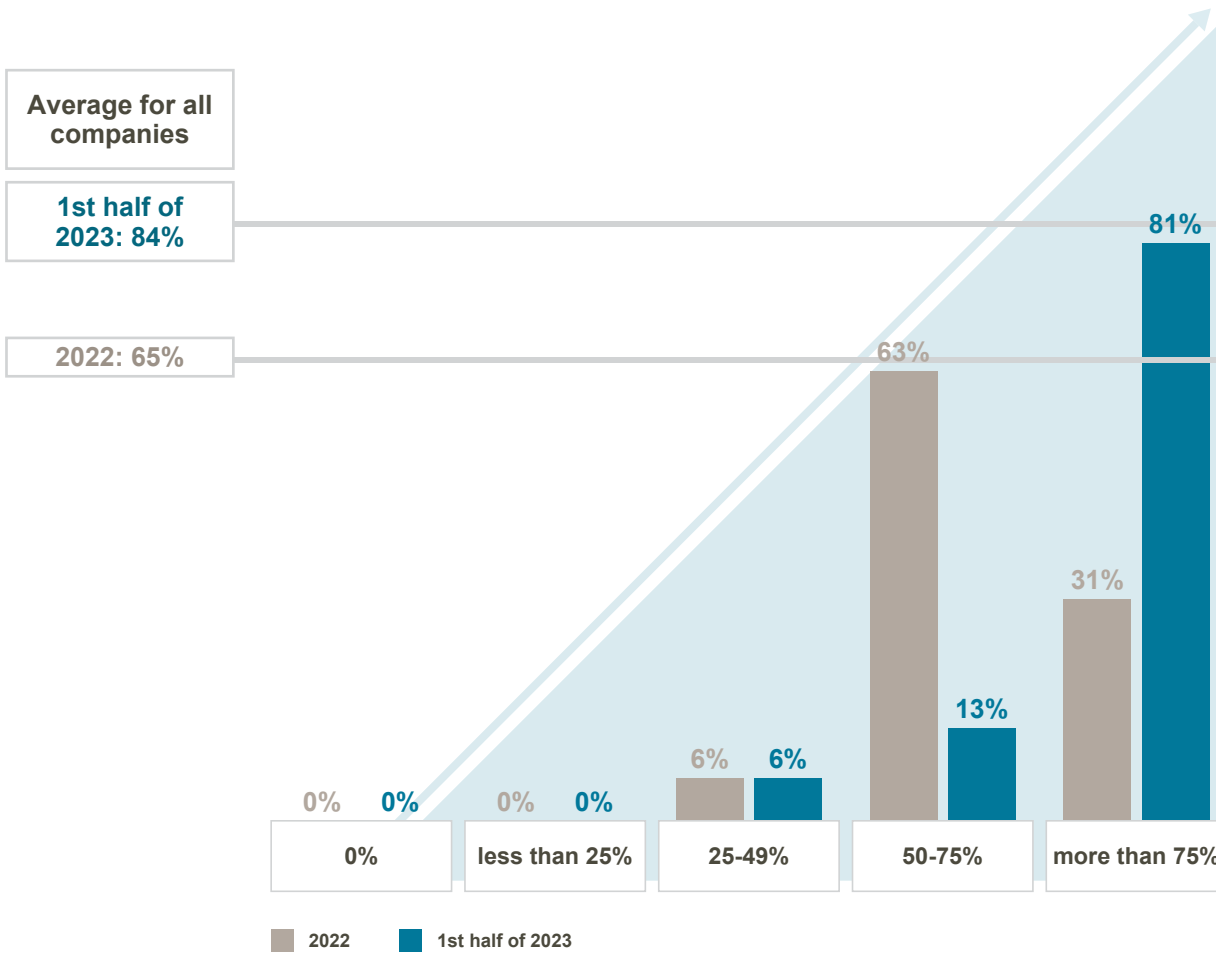


What do you believe would most help the “bounce back” of exhibitions?

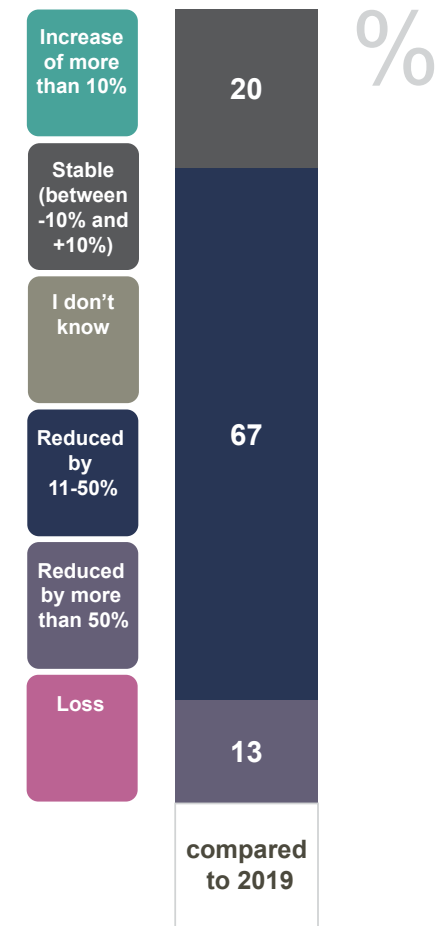




Revenue compared to 2019

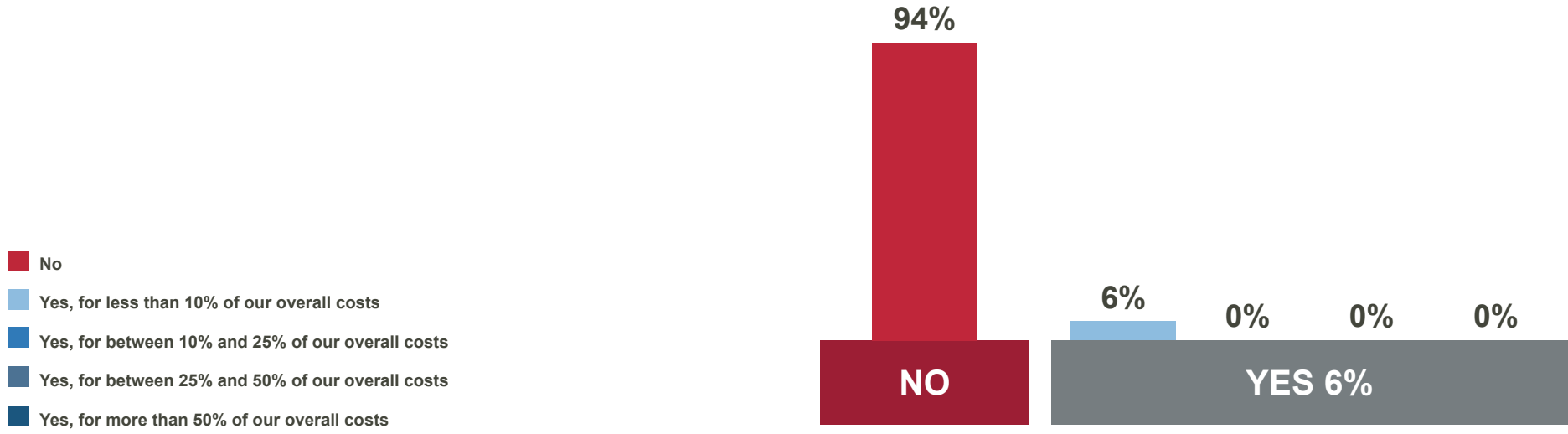


Operating Profits 2021





Did your company benefit from public financial support?

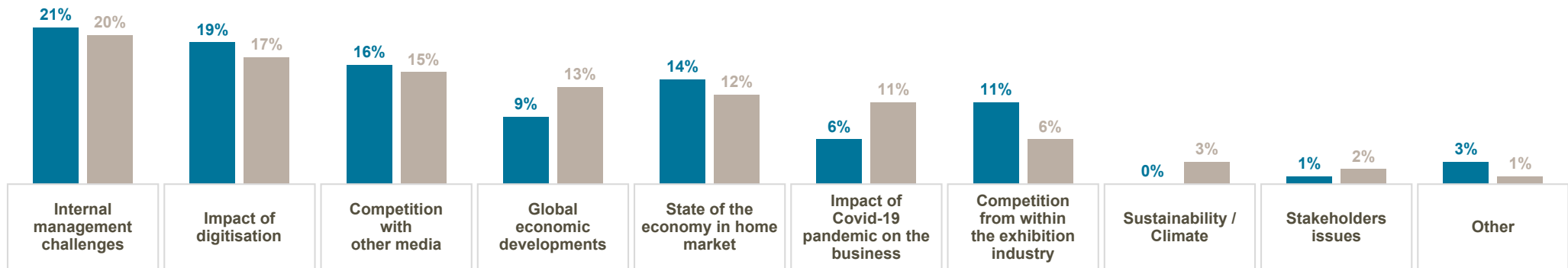


Detailed results for Mexico



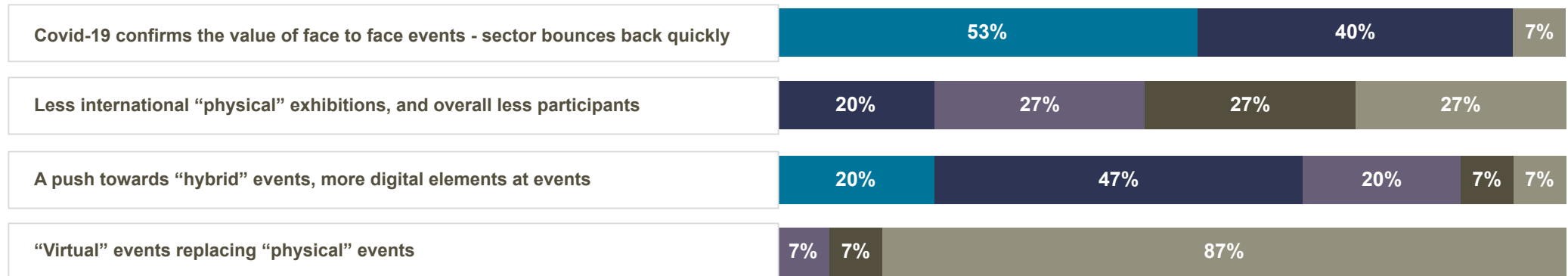
Most important business issues in the exhibition industry

Mexico Global



Format of exhibitions in the coming years

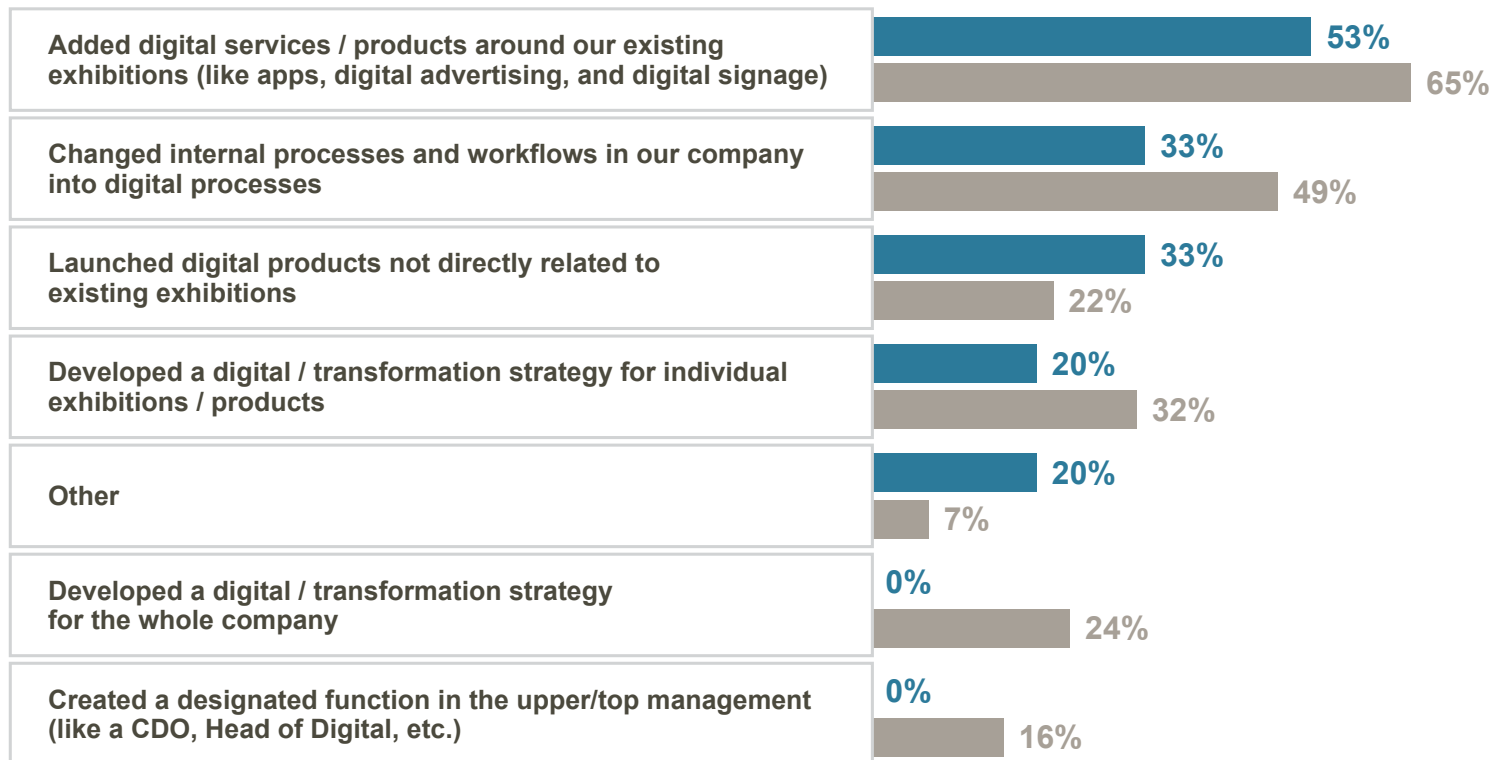
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in Mexico and globally

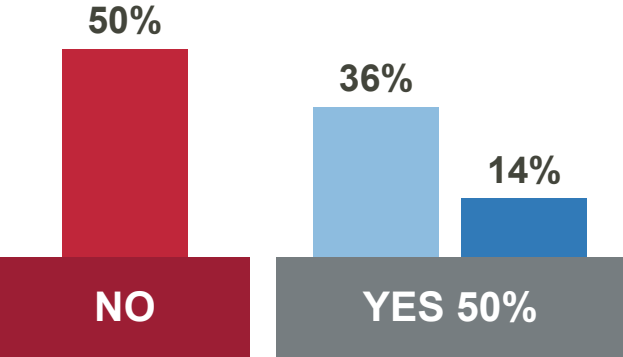
Mexico Global





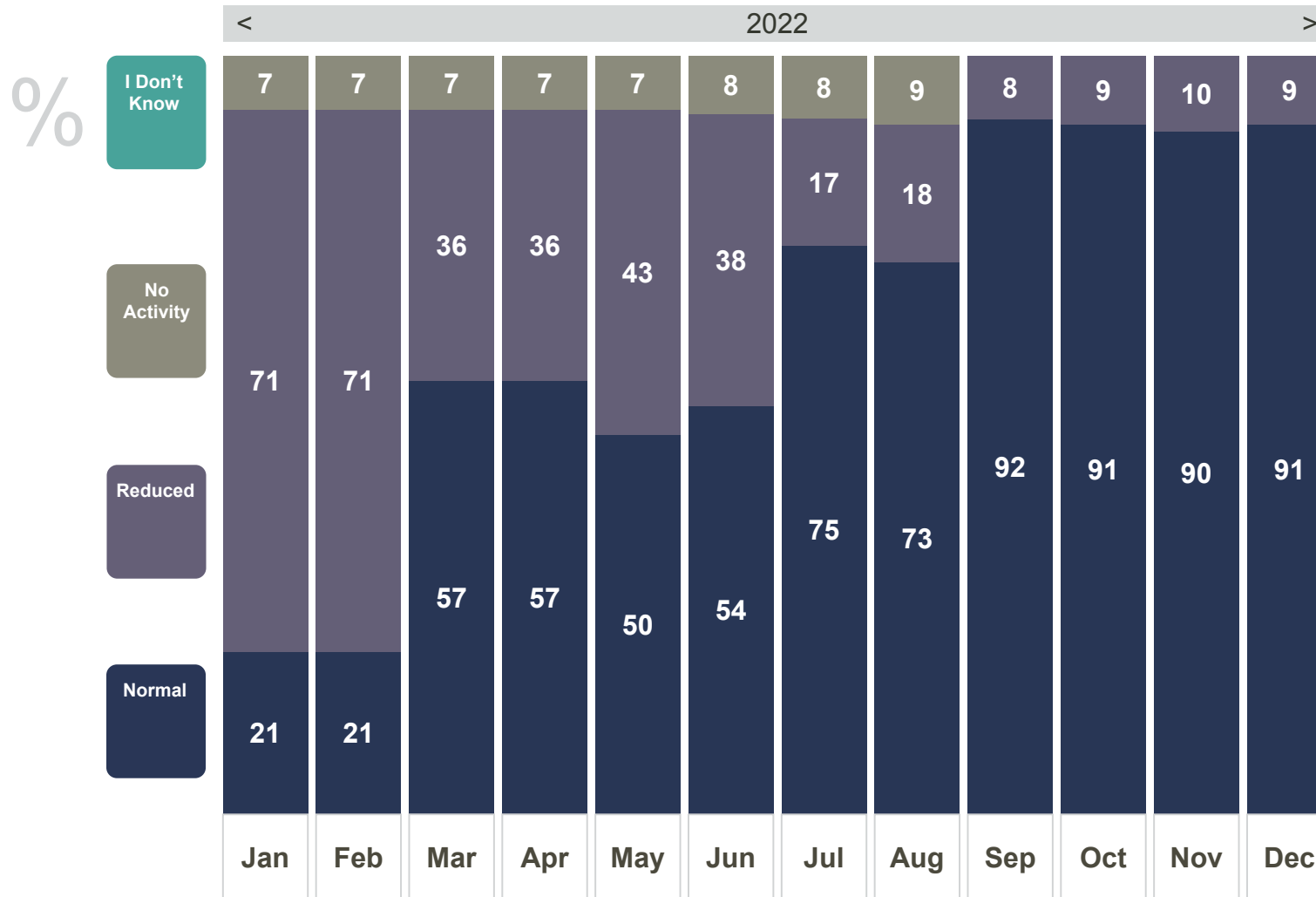
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

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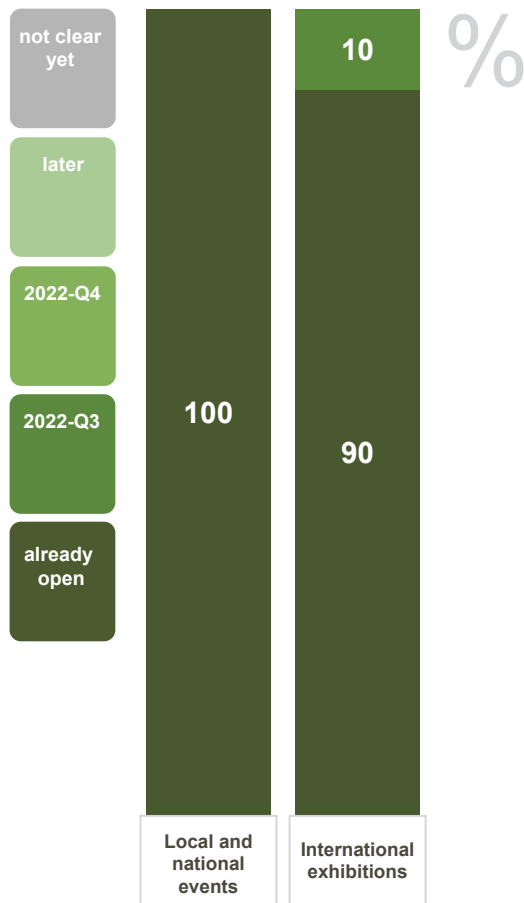


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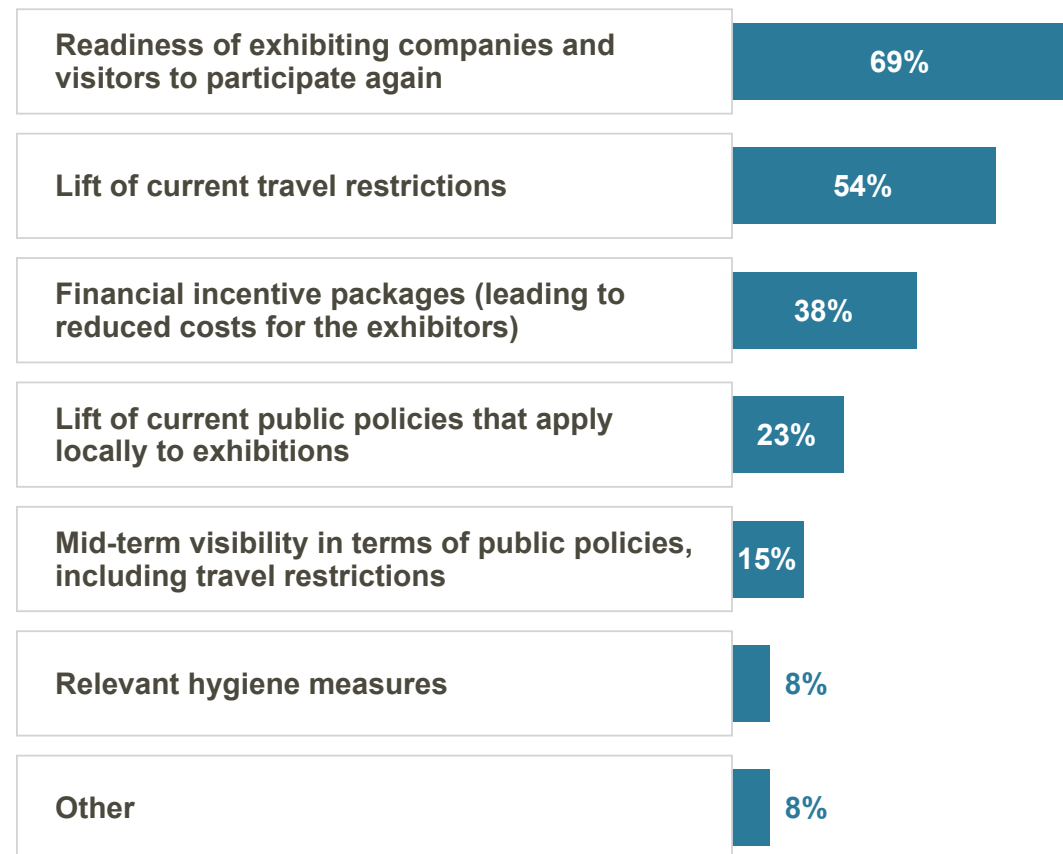




When do you believe exhibitions will open again in your city?

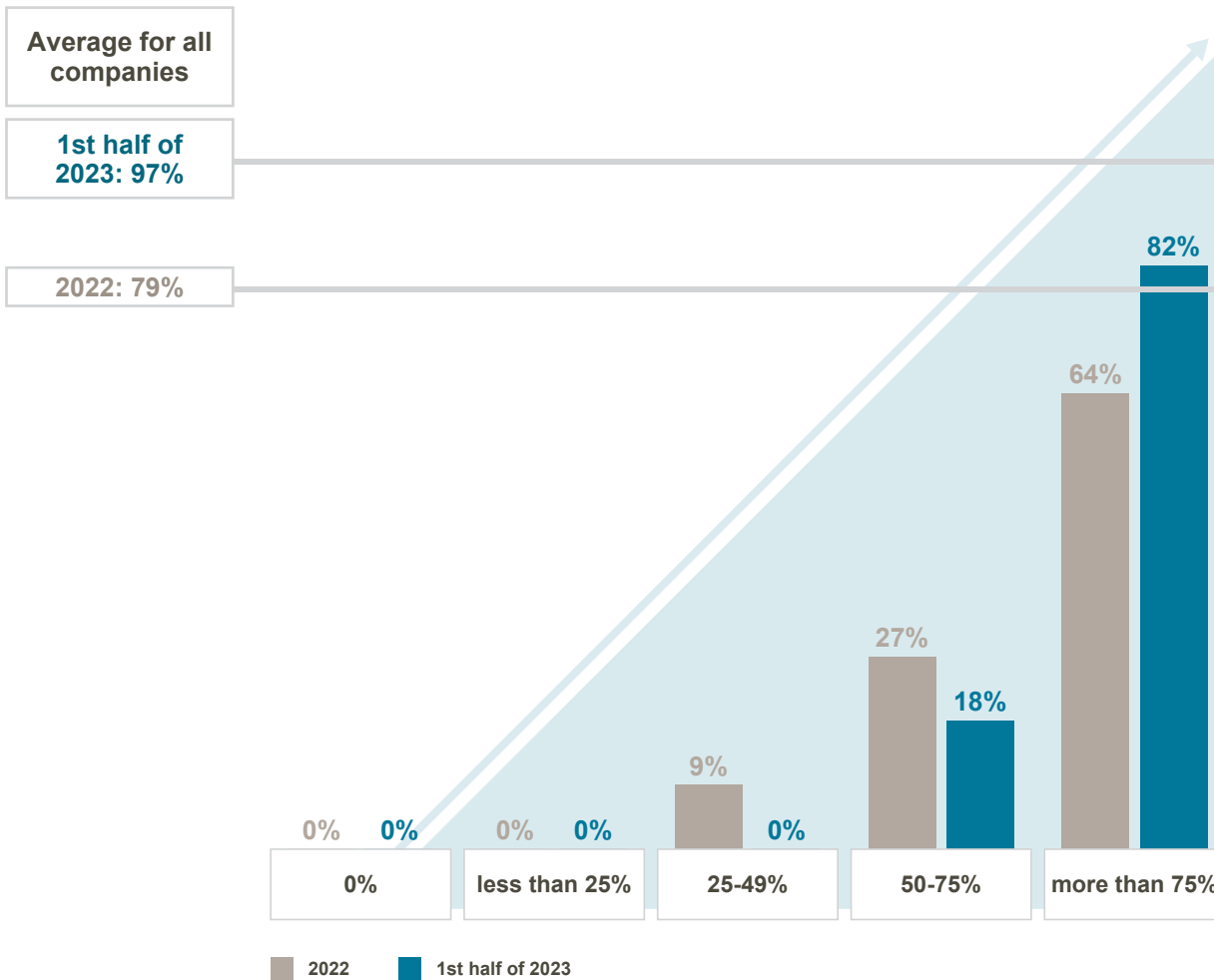


What do you believe would most help the “bounce back” of exhibitions?

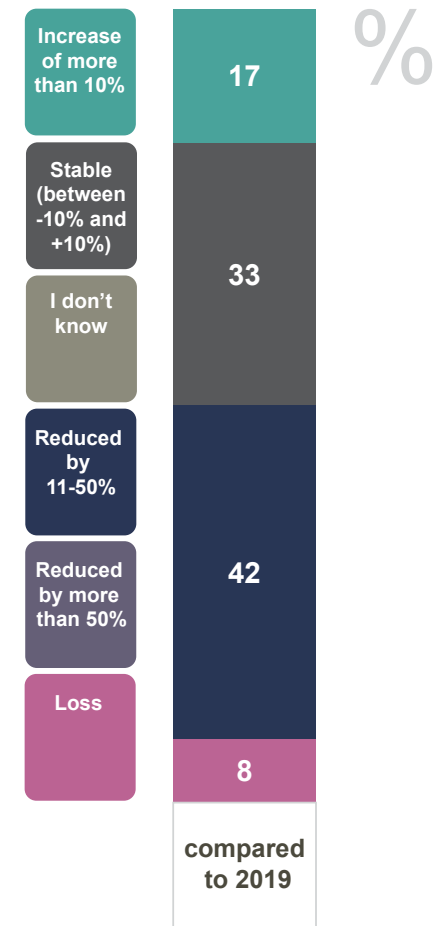




Revenue compared to 2019



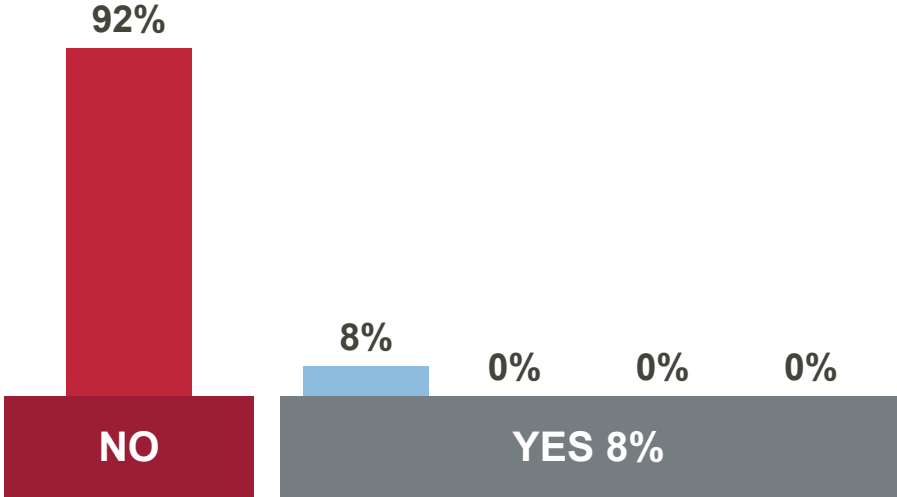
Operating Profits 2021





Did your company benefit from public financial support?

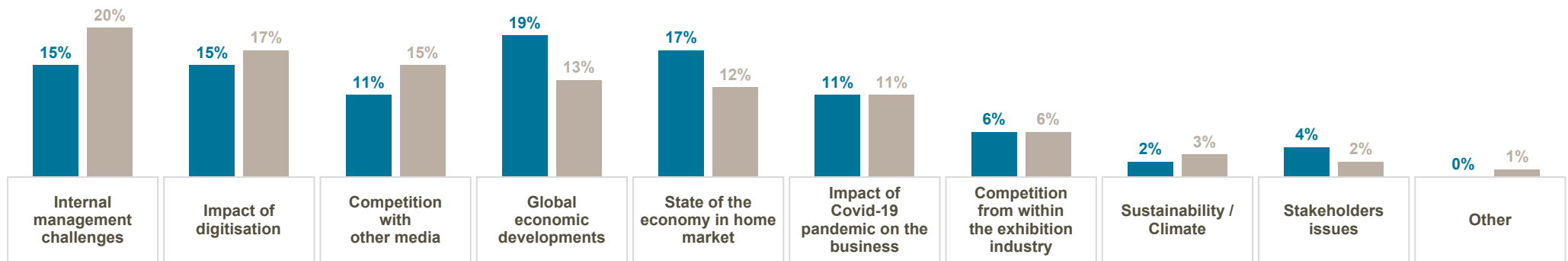
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





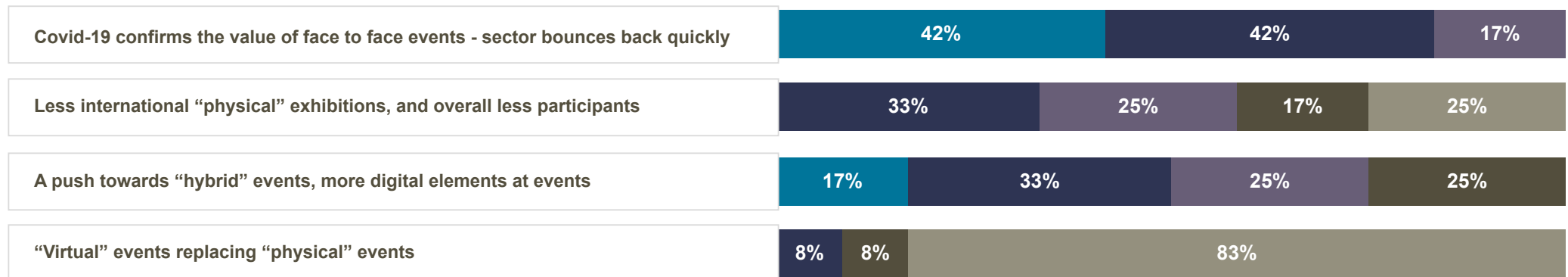
Most important business issues in the exhibition industry

USA
Global



Format of exhibitions in the coming years

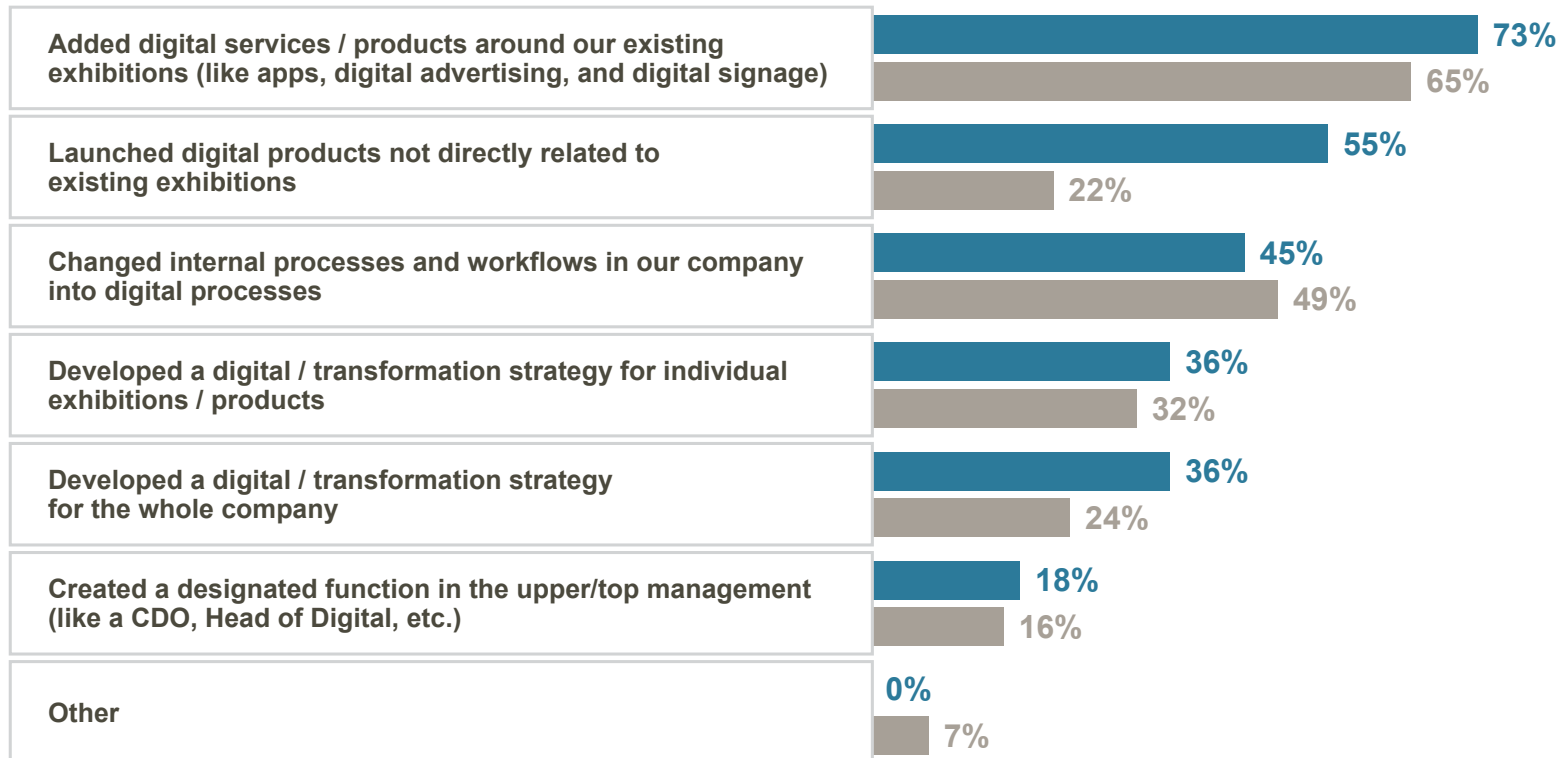
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not





Digitisation: implementation in USA and globally

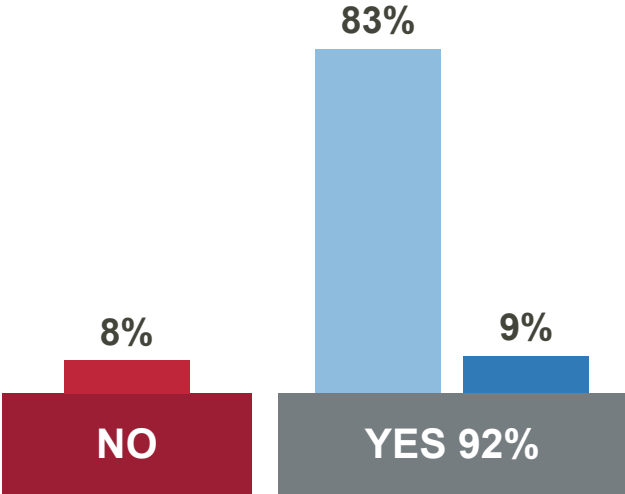
USA Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



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 have a 3D effect, appearing as if they are spheres or rings with a dark center and a lighter outer edge.

Central & South America

Operations - Reopening Exhibitions Central & South America

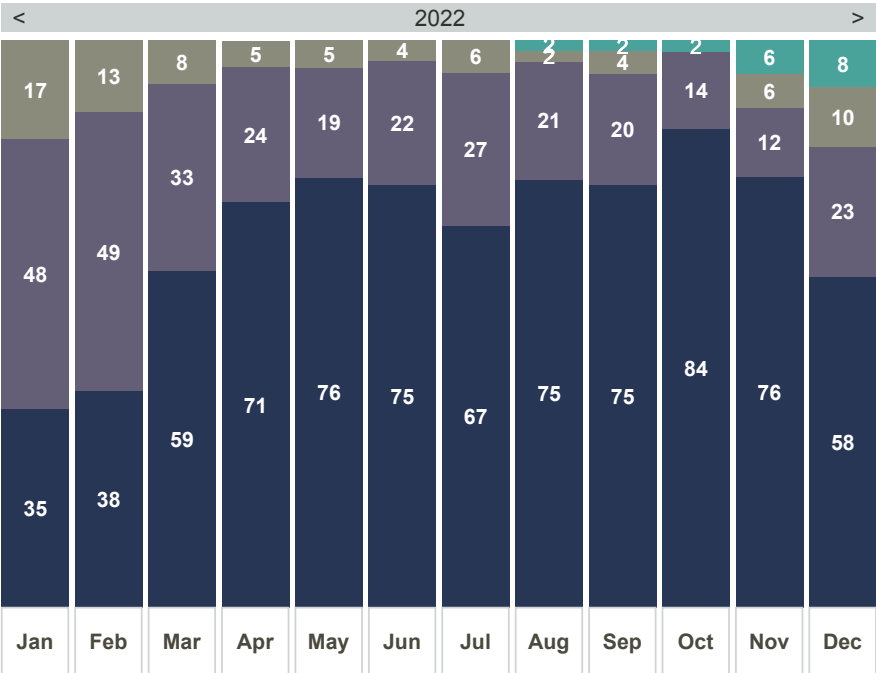


Situation of the industry operations for the 1st half of 2022, and current predictions for the 2nd half of 2022

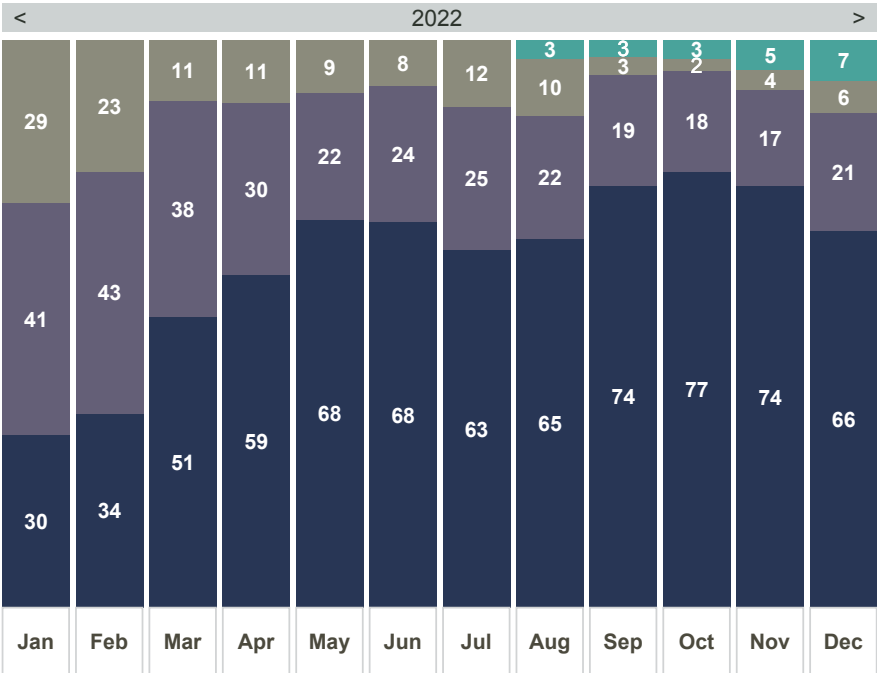


%

Central & South America



World



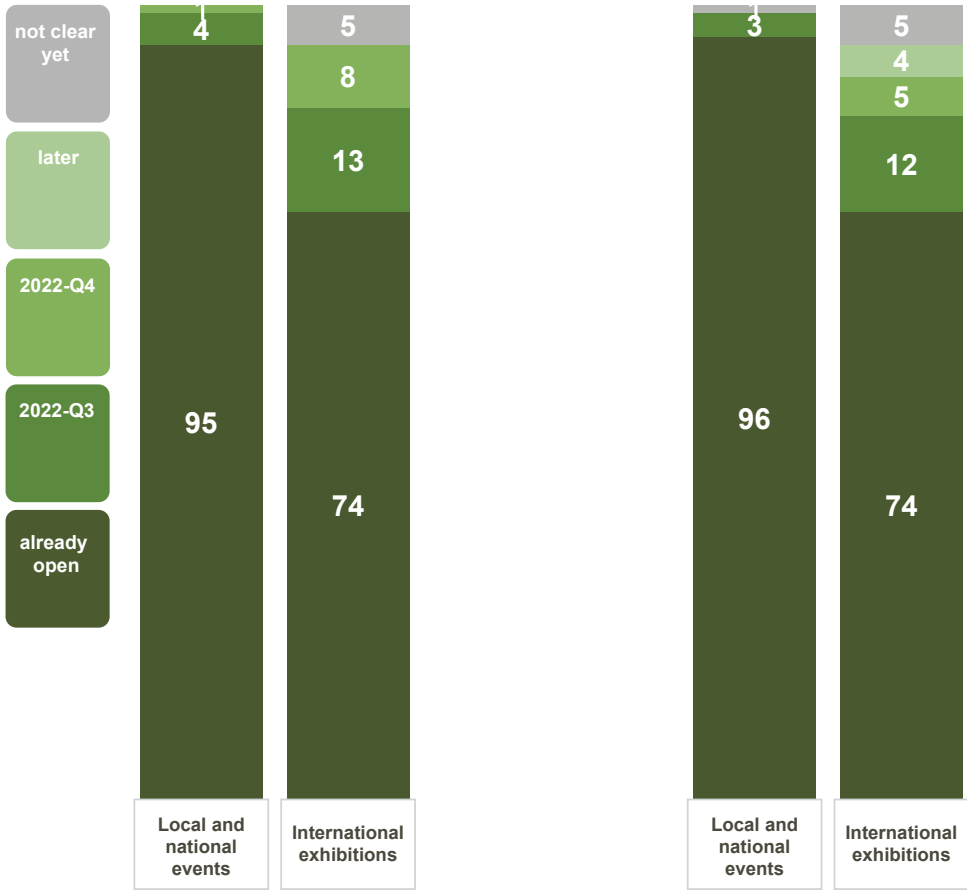
Operations - Reopening Exhibitions Central & South America



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

Central & South America

World

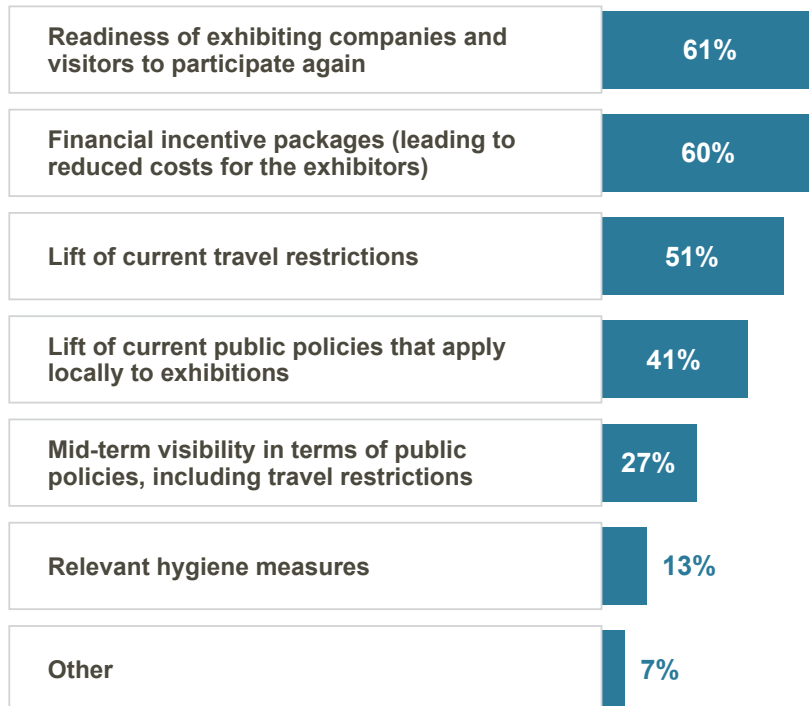


%

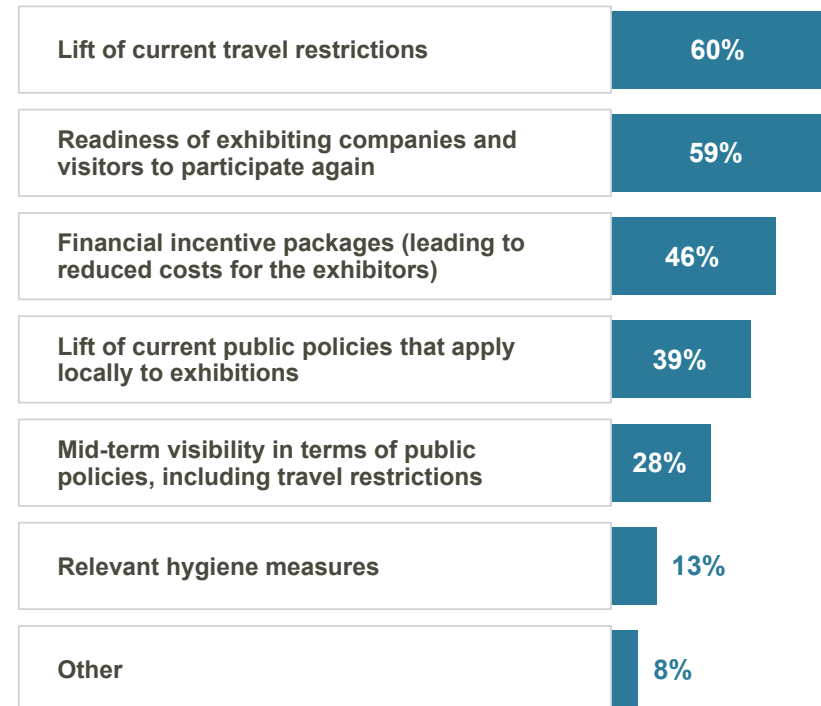


What do you believe would most help the “bounce back” of exhibitions?

Central & South America



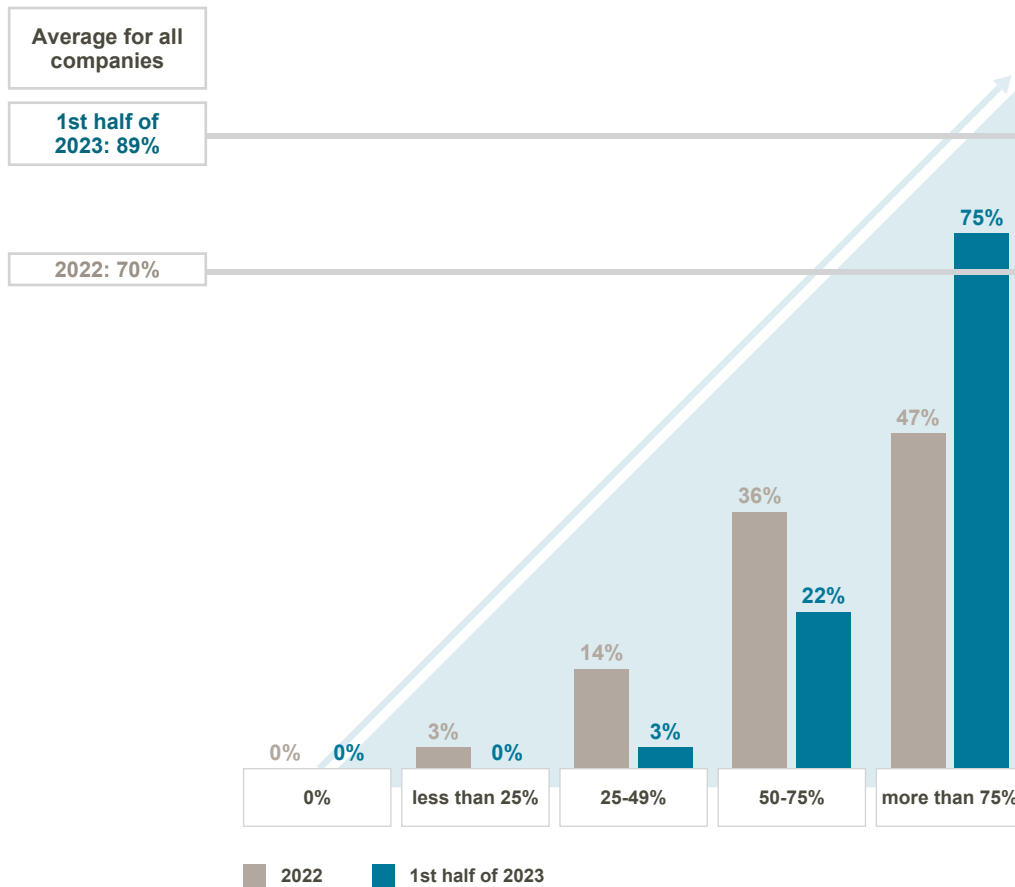
World



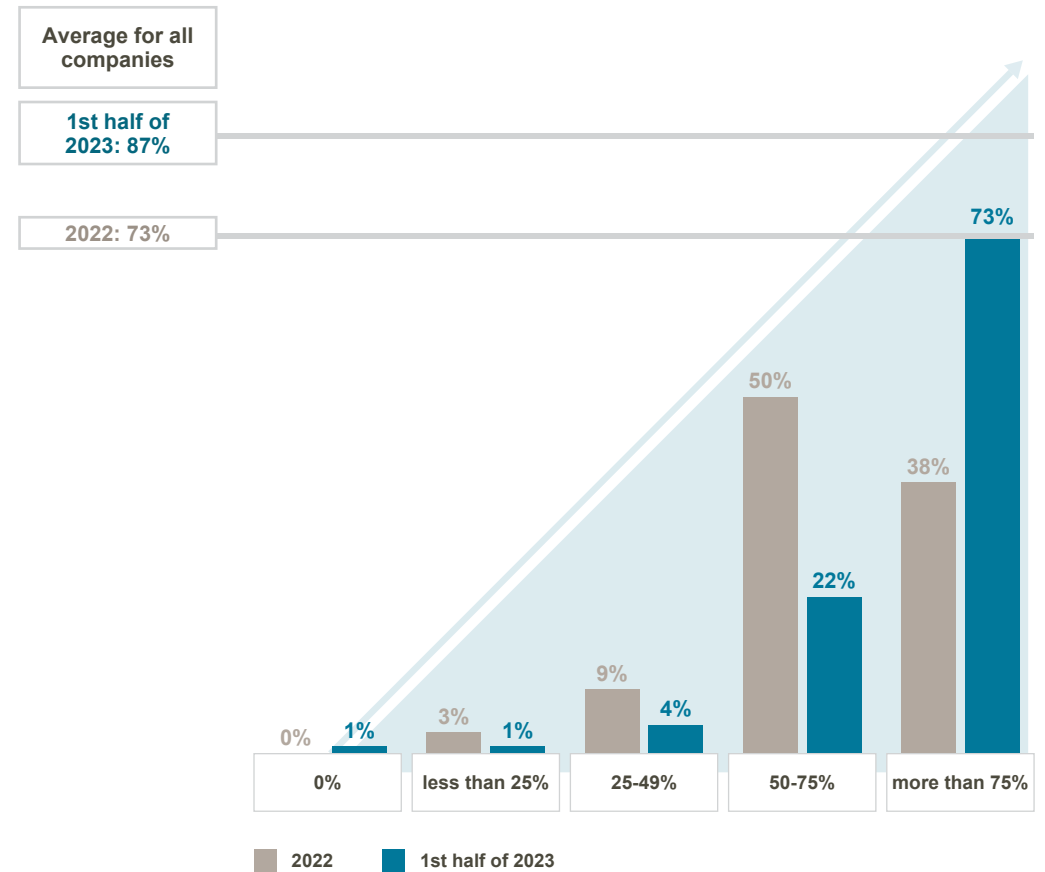
Turnover Central & South America

Revenue compared to 2019

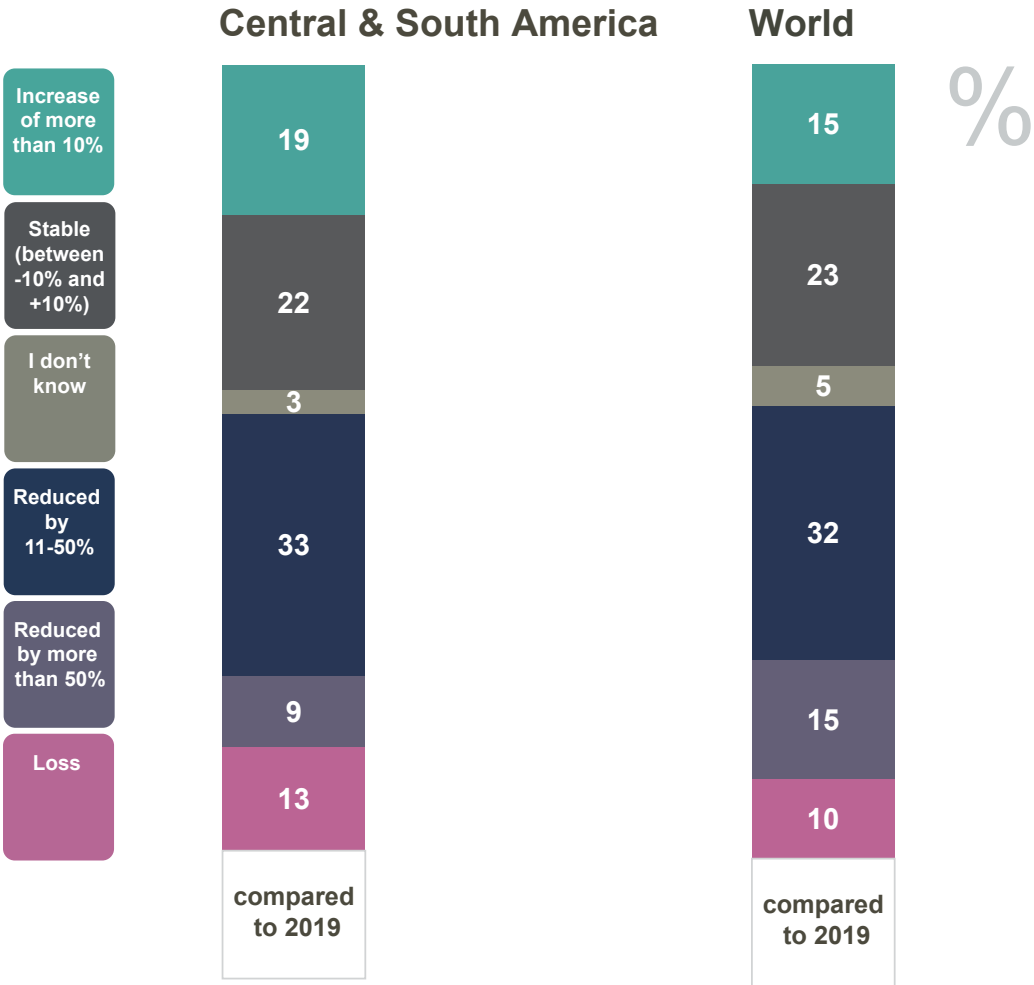
Central & South America



World



Operating profit 2019 Central & South America

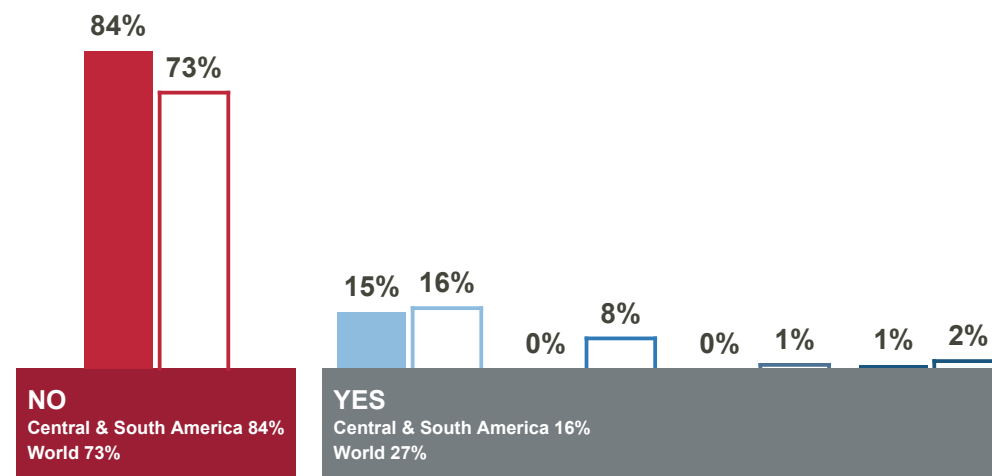


Did your company benefit from public financial support?

Central & South America

World

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

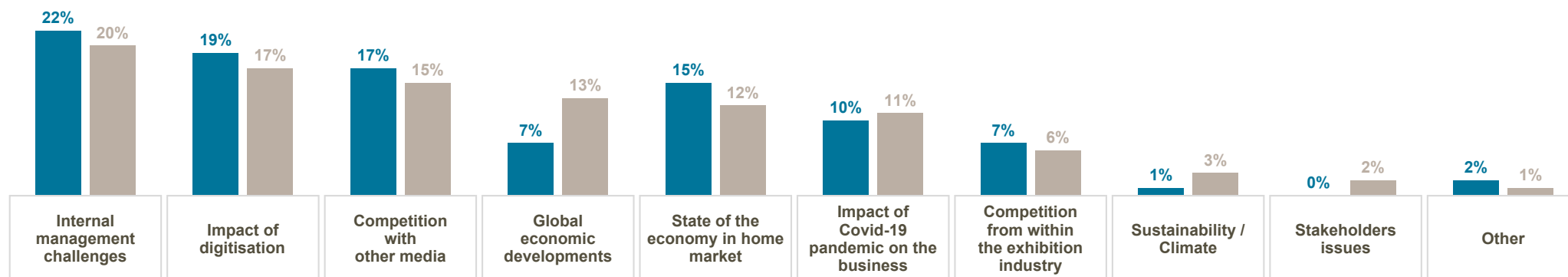


Most Important Business Issues - Format of Exhibitions - Central & South America



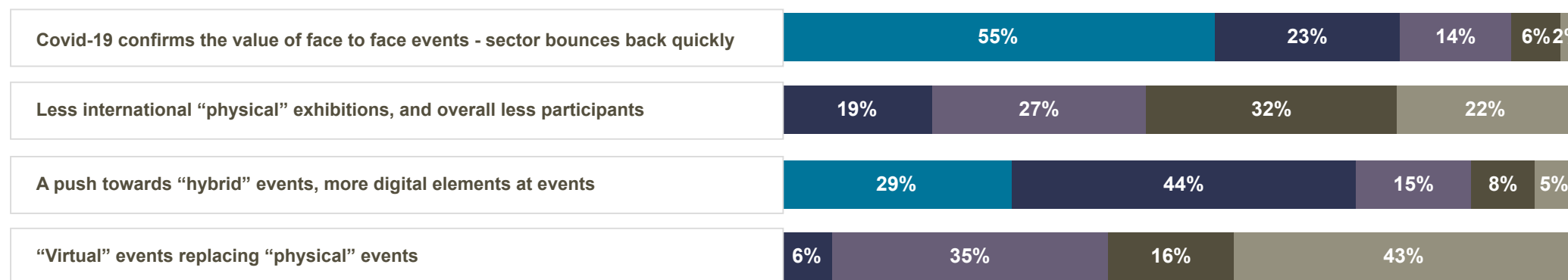
Most important business issues in the exhibition industry

Central & South America Global



Format of exhibitions in the coming years

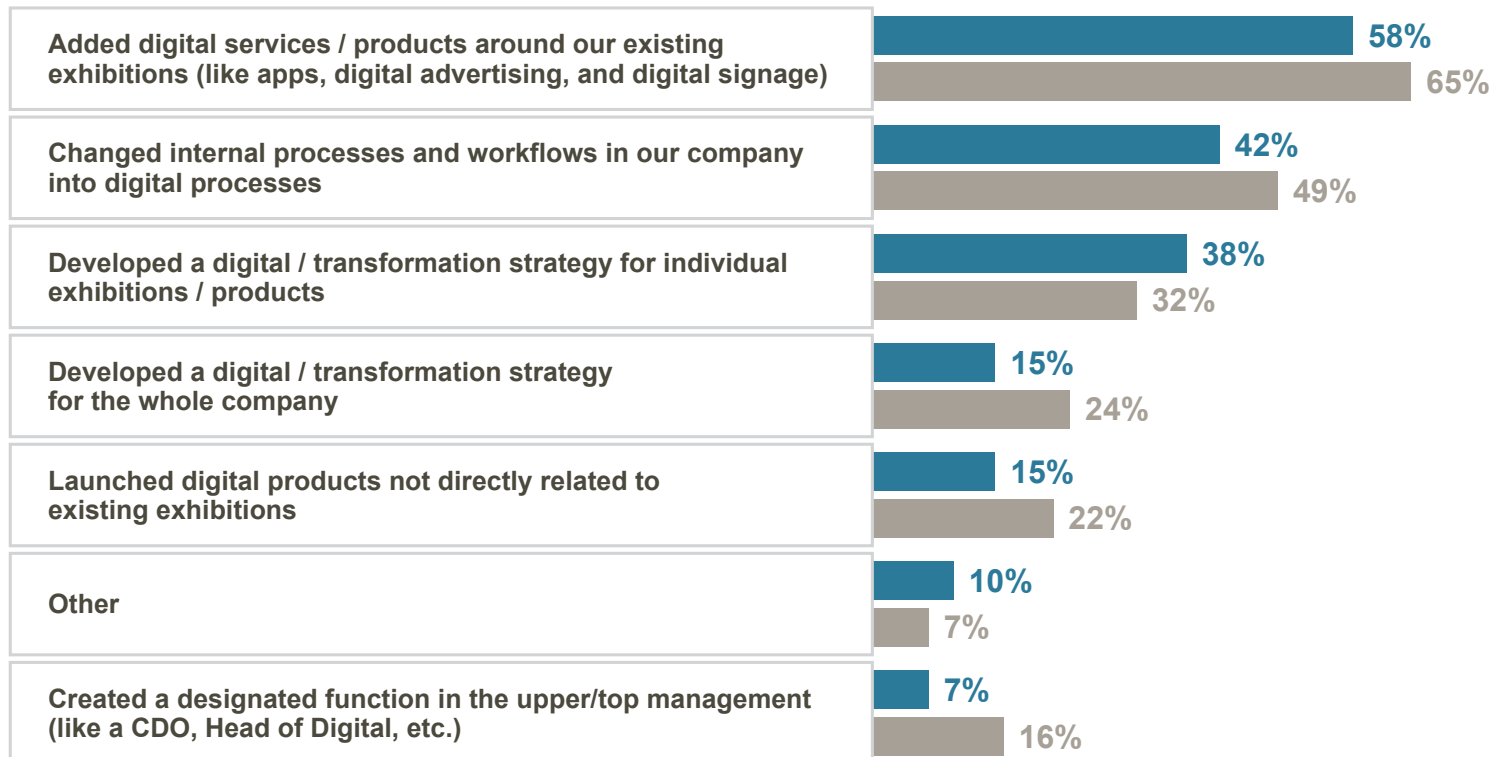
Yes, for sure Most probably Not sure Not sure at all Definitely not



Digitisation: implementation in Central & South America and globally

Central & South America

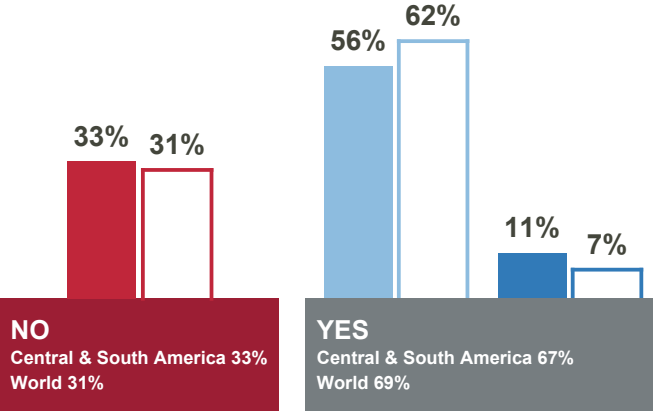
Global



HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

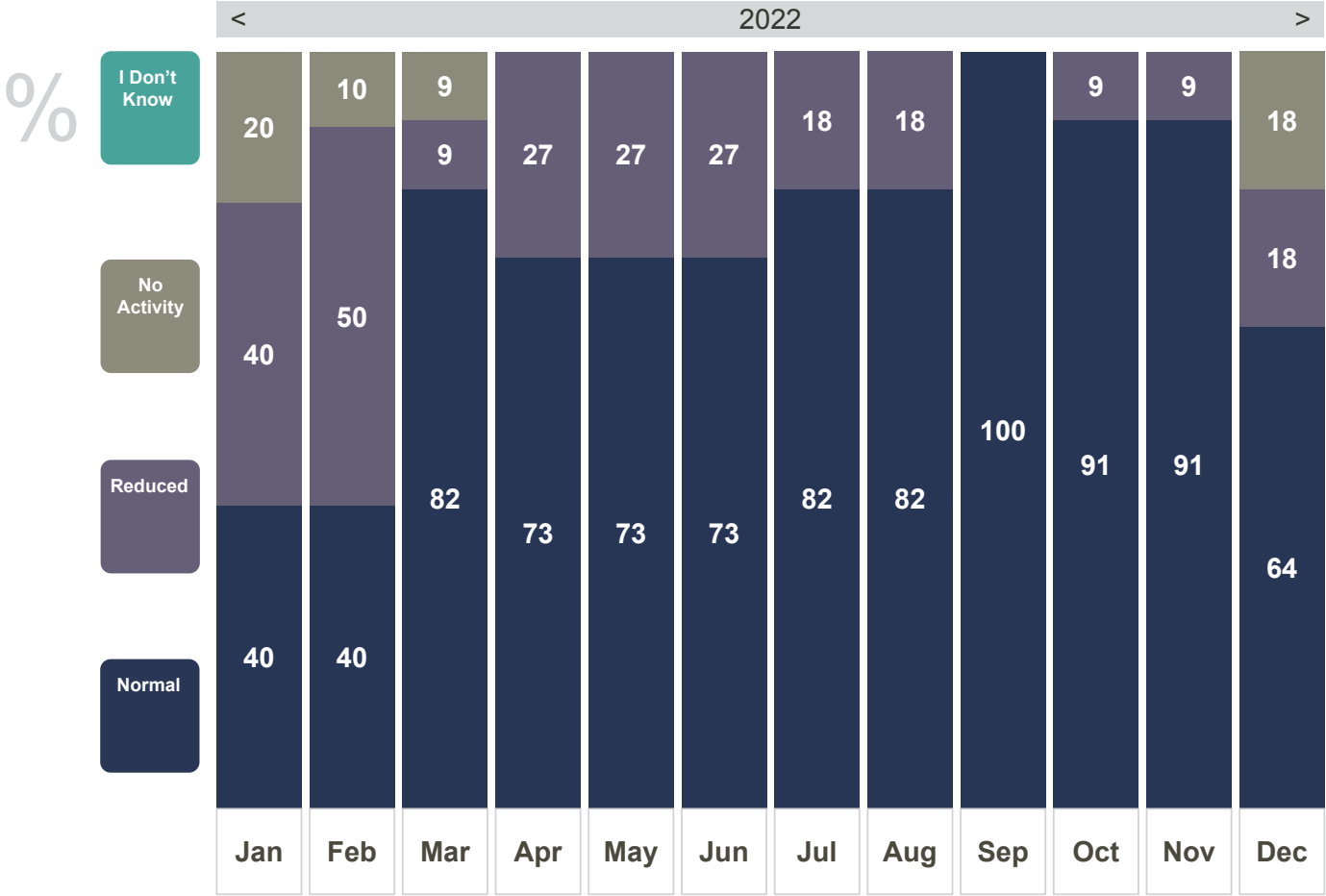
Central & South America World

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



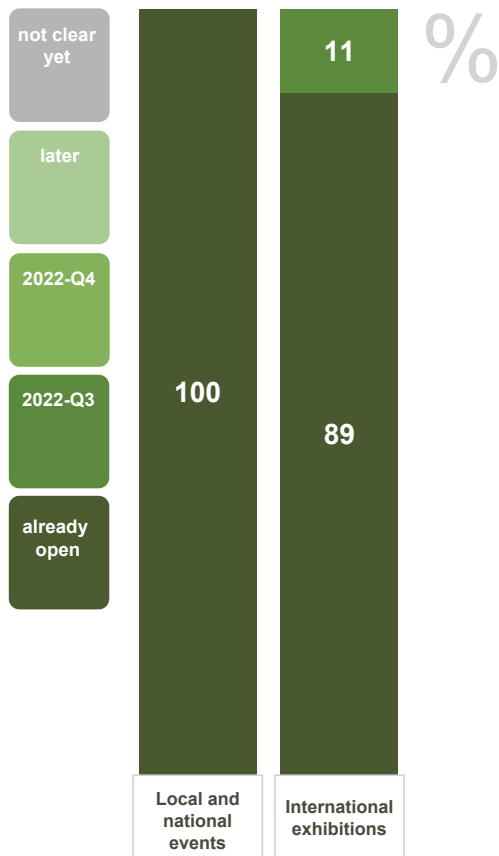


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

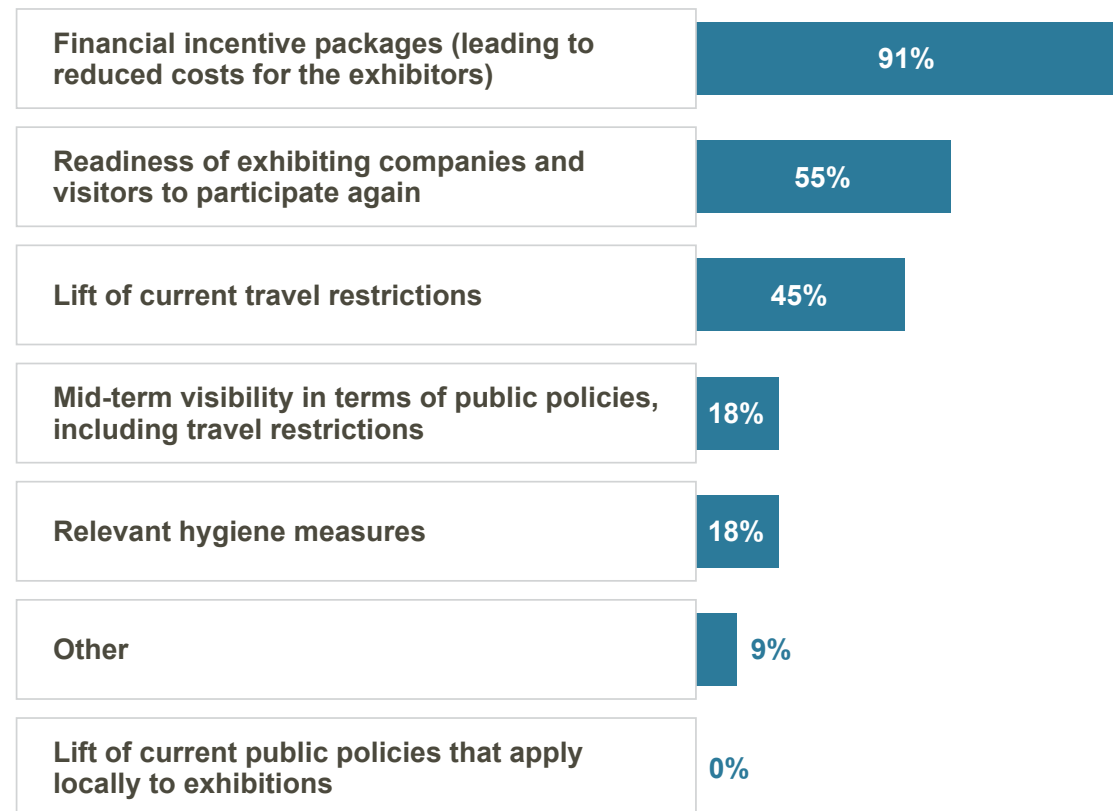




When do you believe exhibitions will open again in your city?



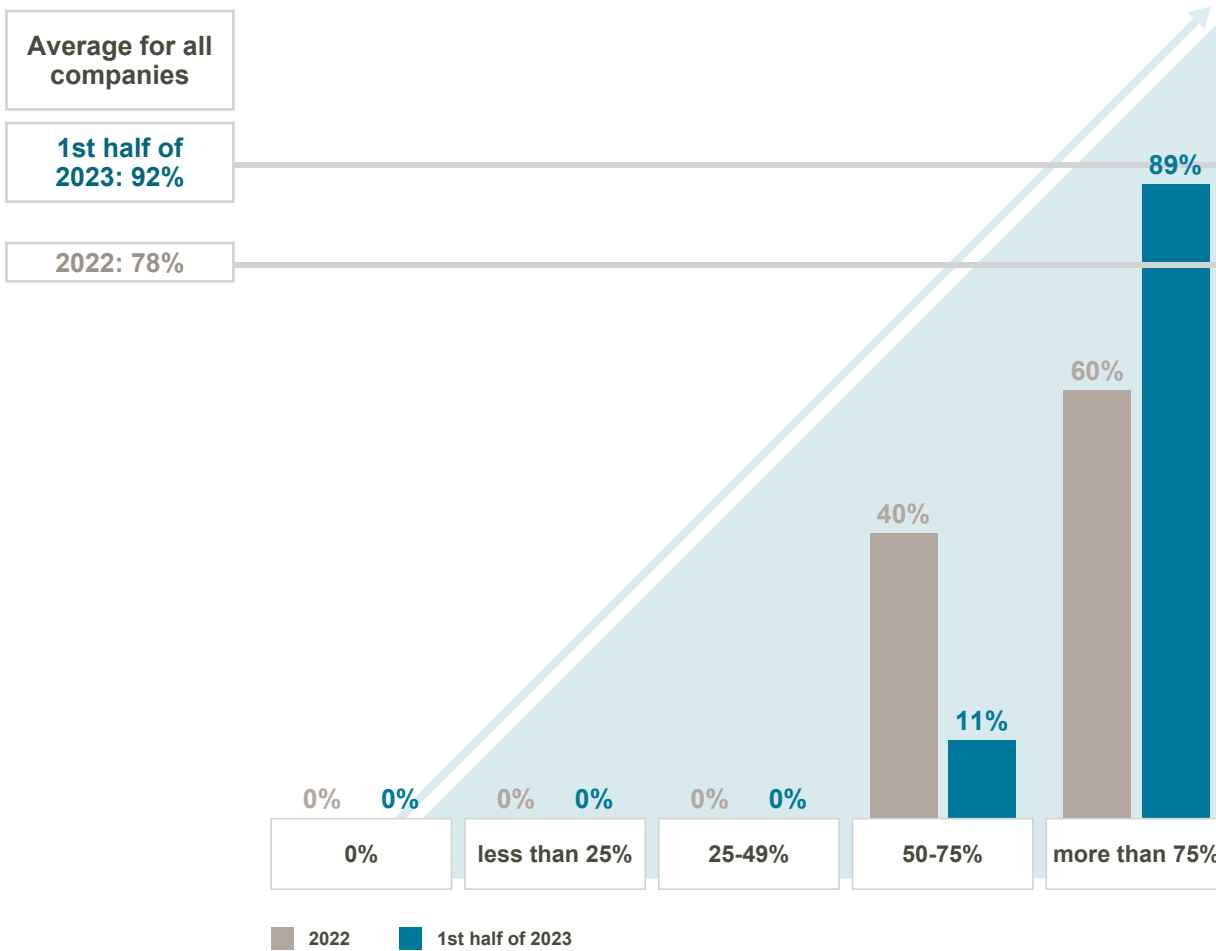
What do you believe would most help the “bounce back” of exhibitions?



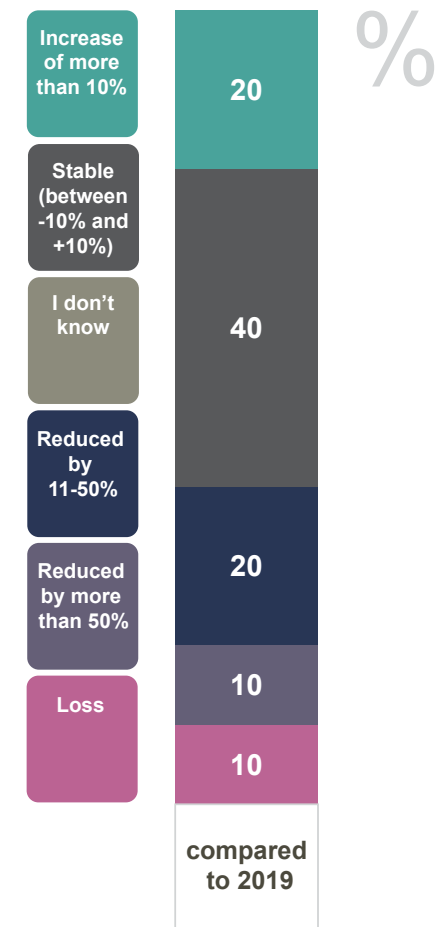
Detailed results for Argentina



Revenue compared to 2019



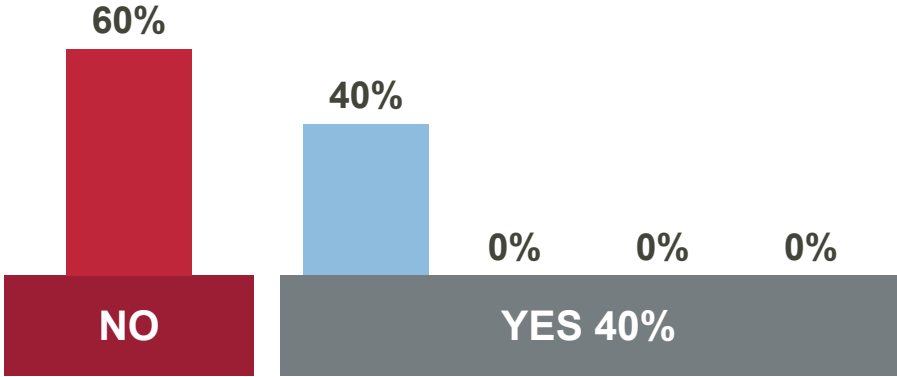
Operating Profits 2021





Did your company benefit from public financial support?

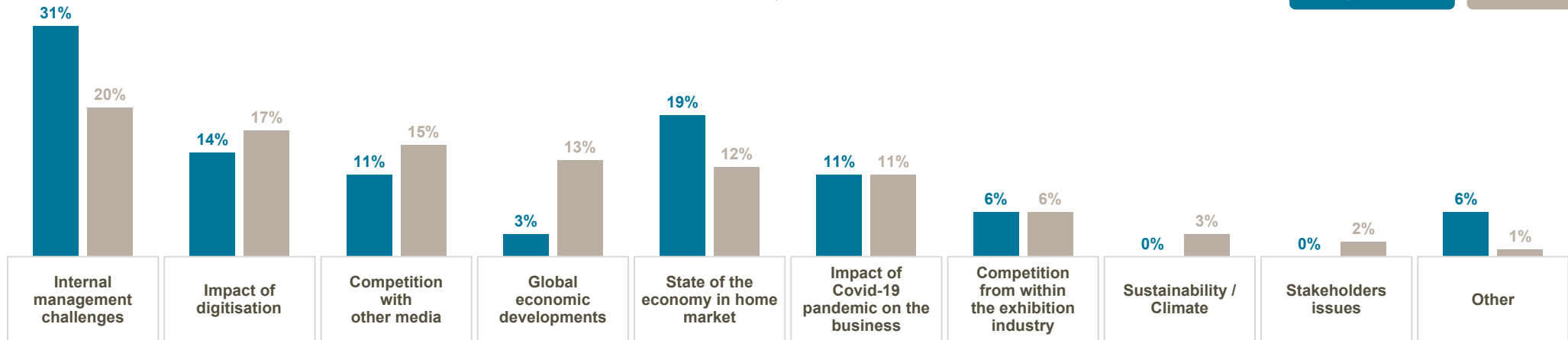
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
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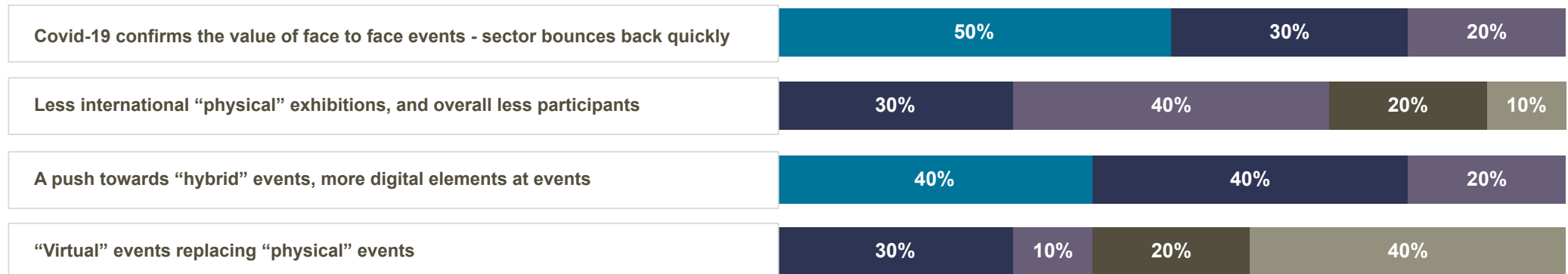
Most important business issues in the exhibition industry

Argentina Global



Format of exhibitions in the coming years

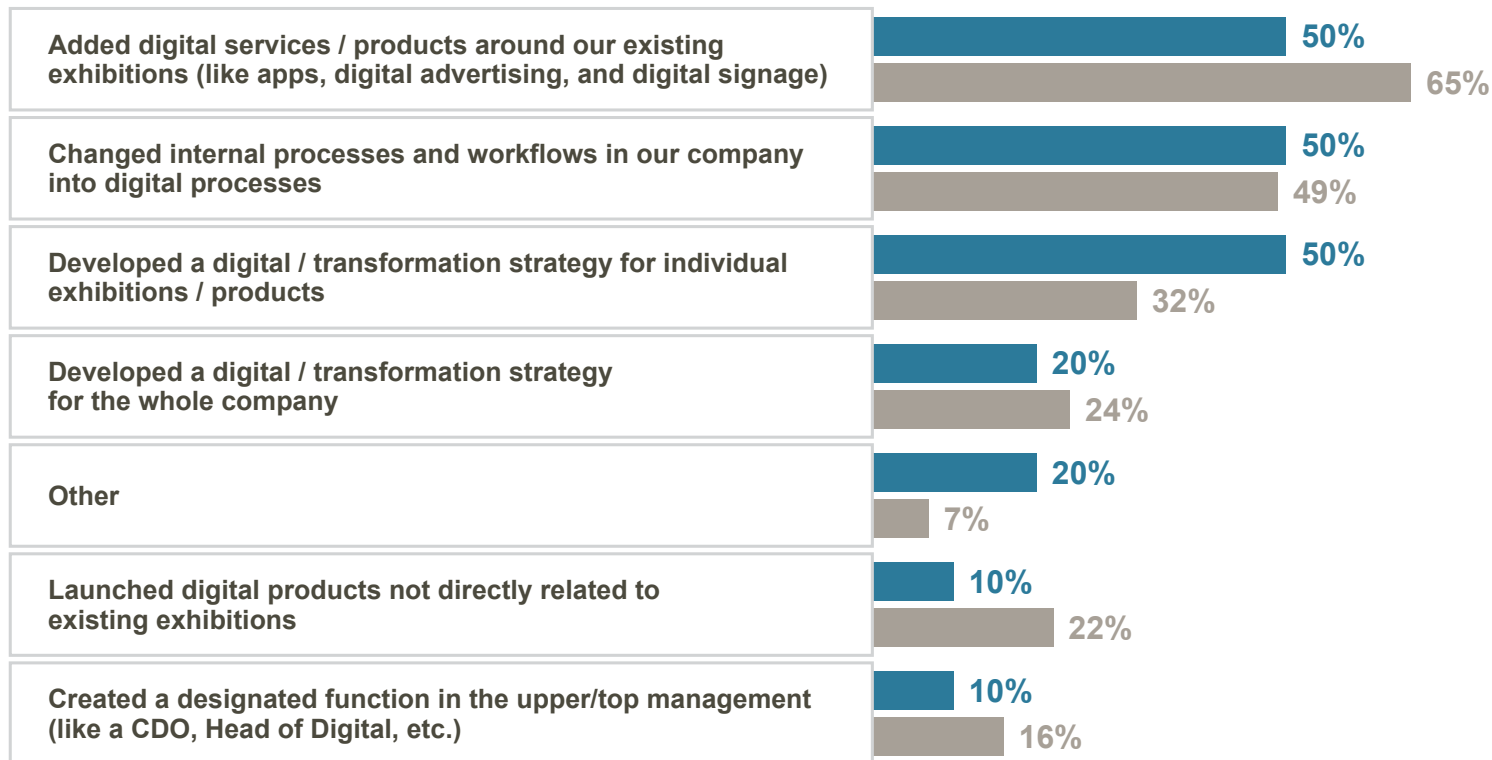
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in Argentina and globally

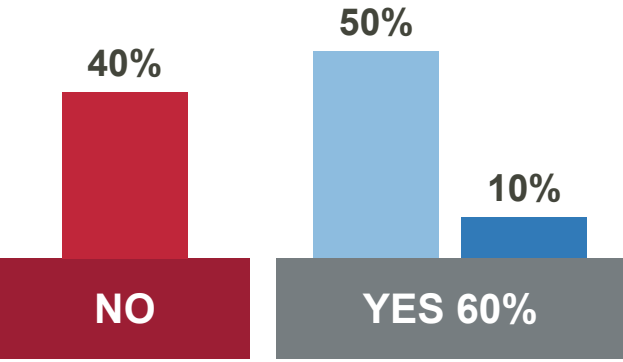
Argentina Global





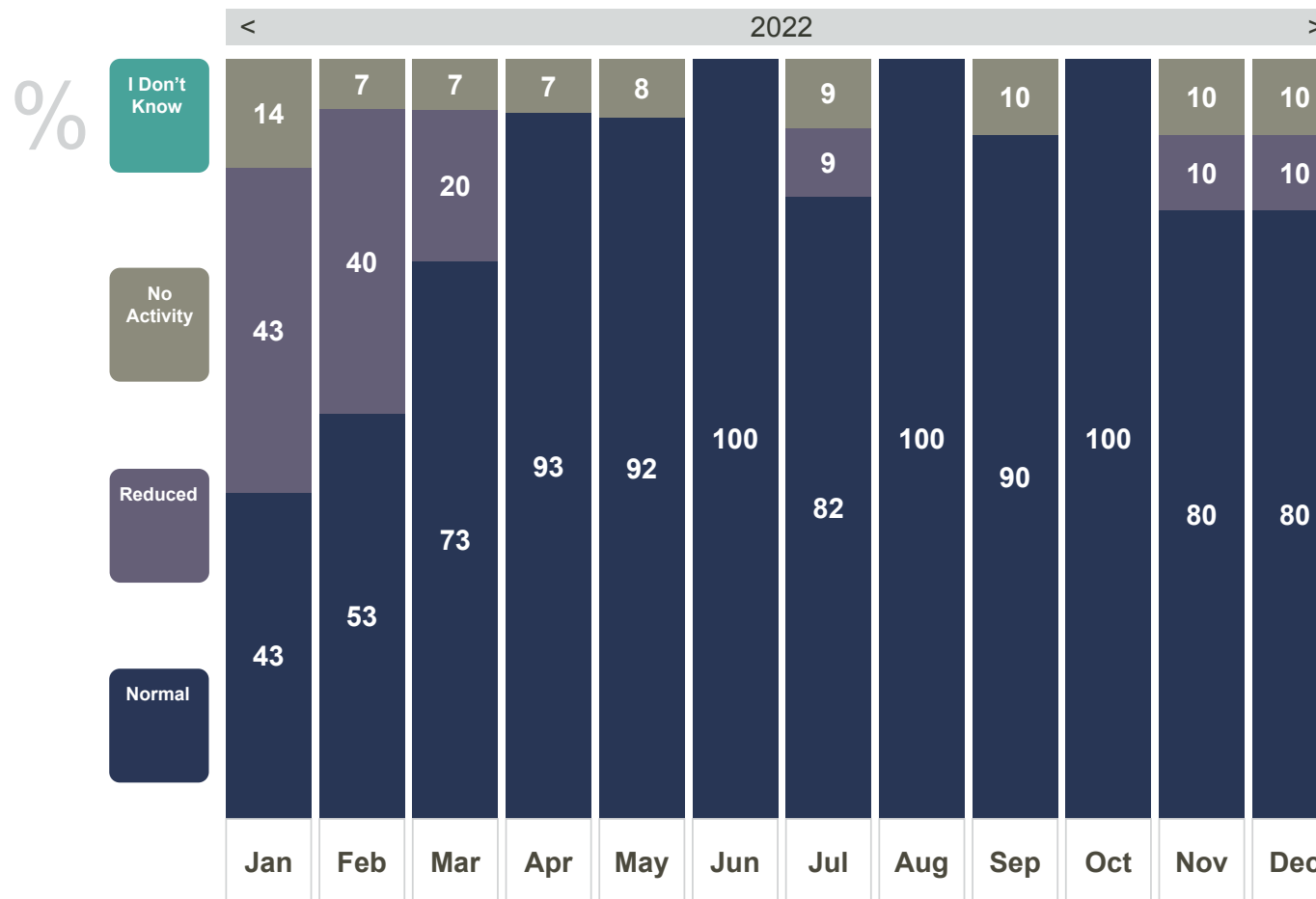
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



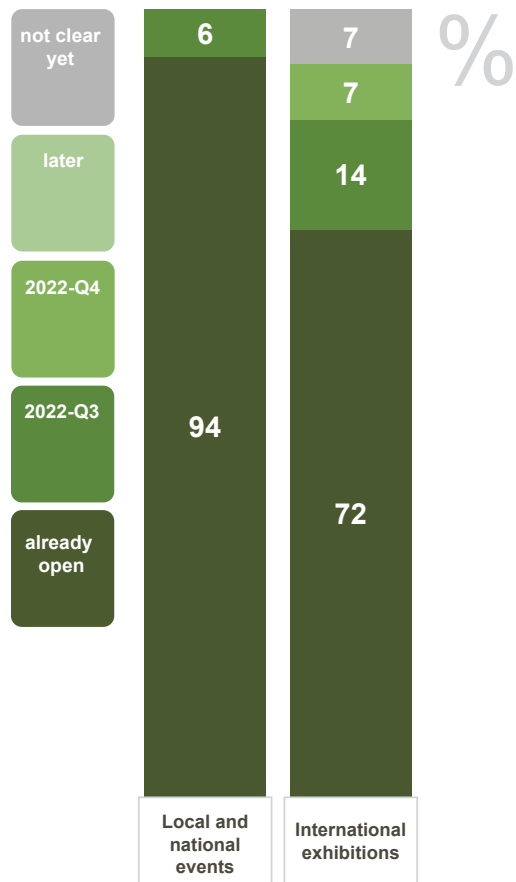


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

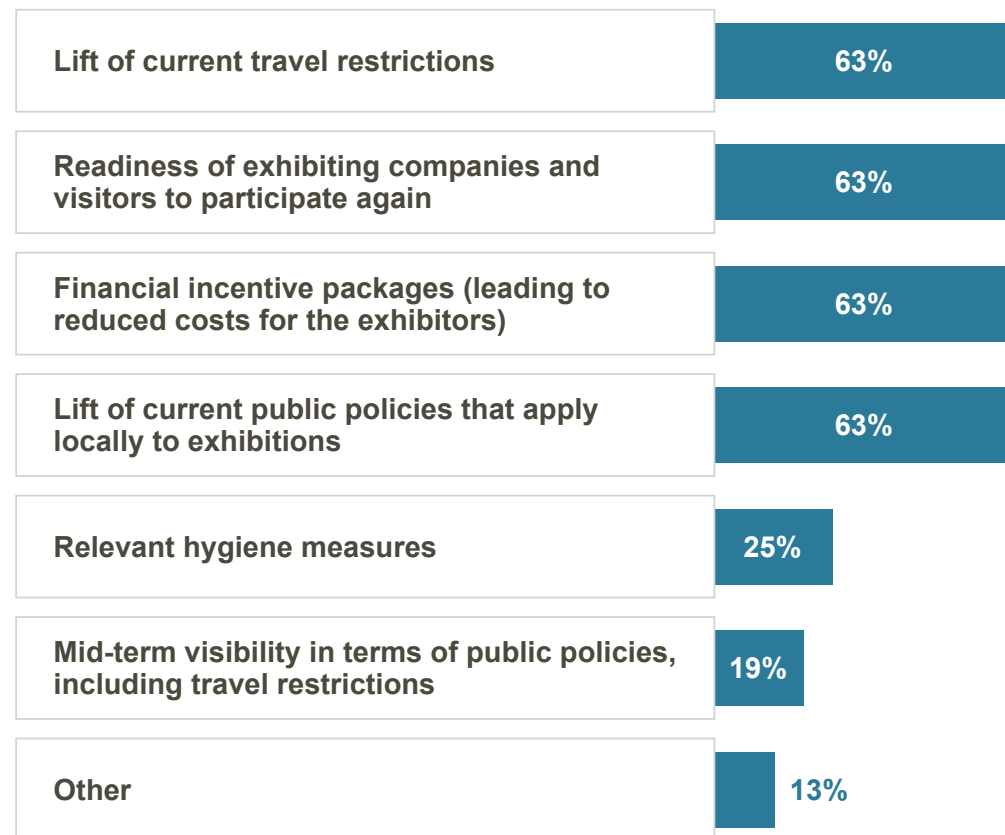




When do you believe exhibitions will open again in your city?



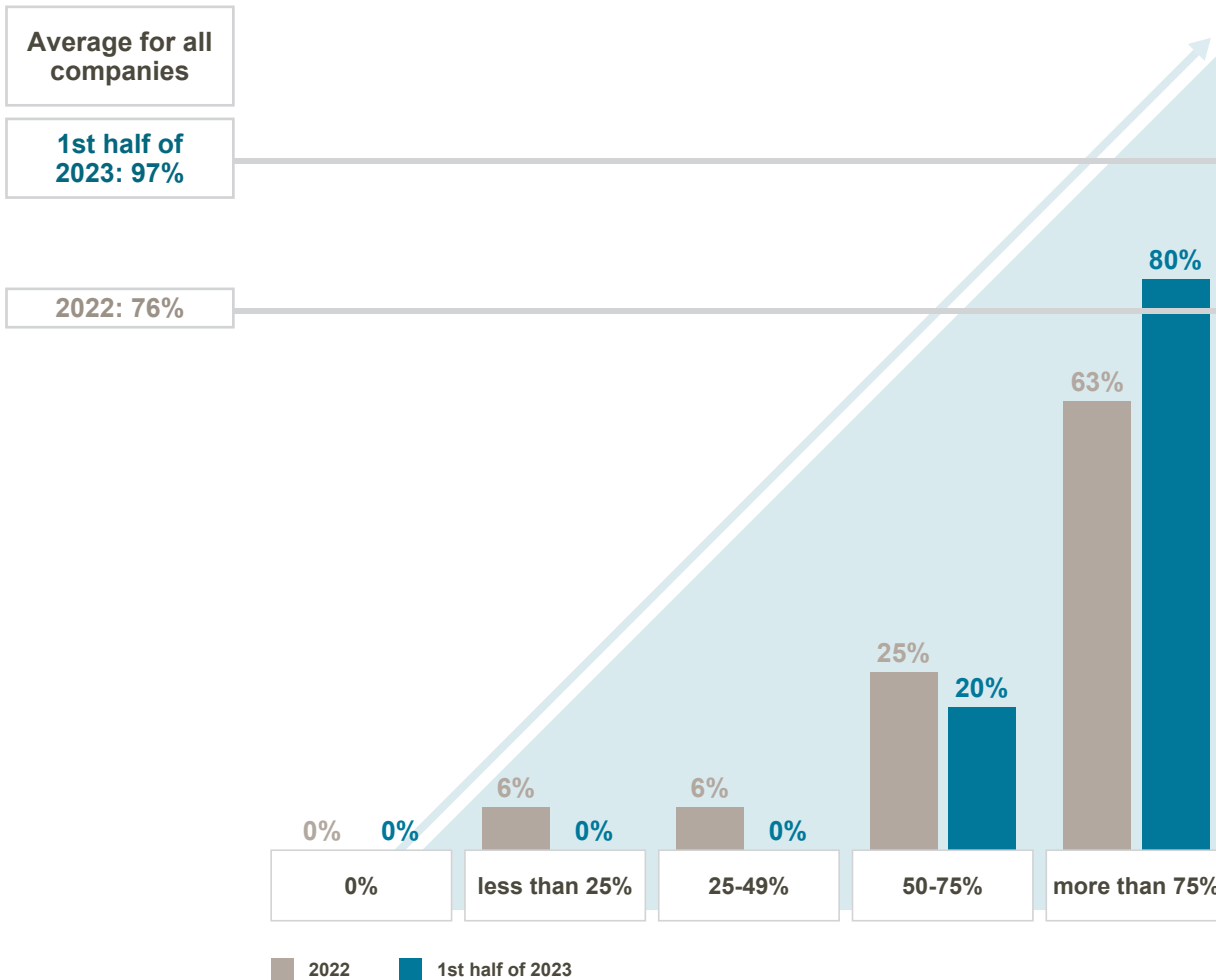
What do you believe would most help the “bounce back” of exhibitions?



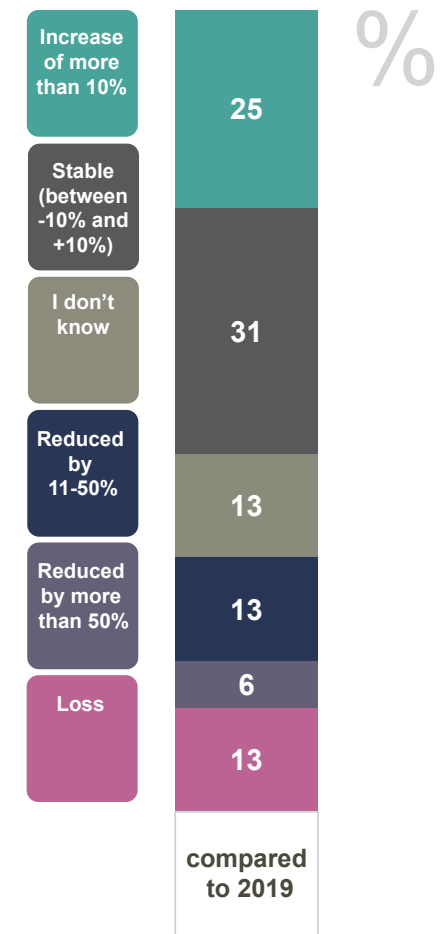
Detailed results for Brazil



Revenue compared to 2019



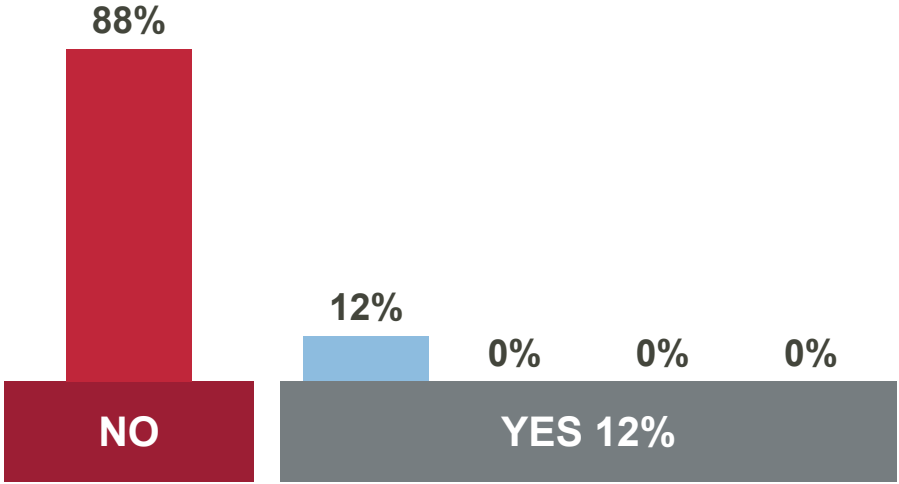
Operating Profits 2021





Did your company benefit from public financial support?

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

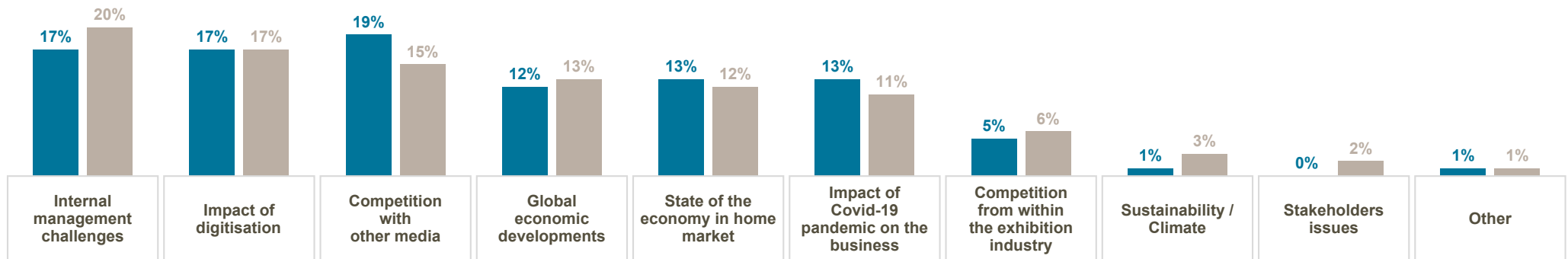




Most important business issues in the exhibition industry

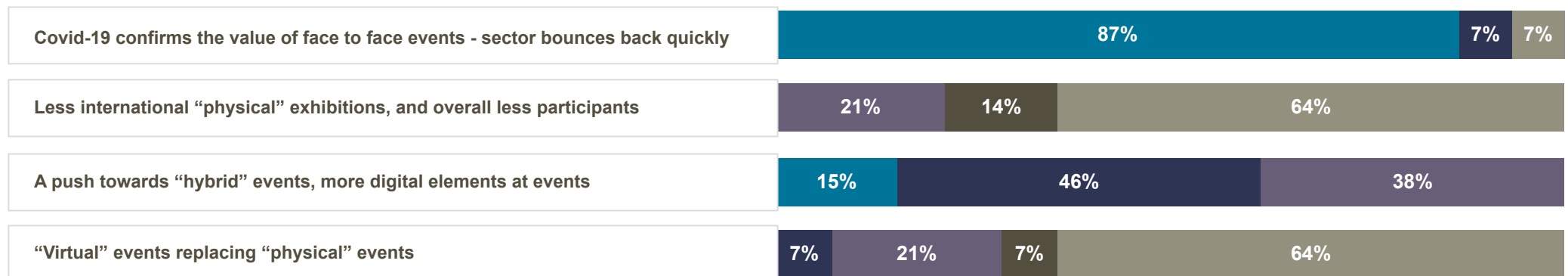
Brazil

Global



Format of exhibitions in the coming years

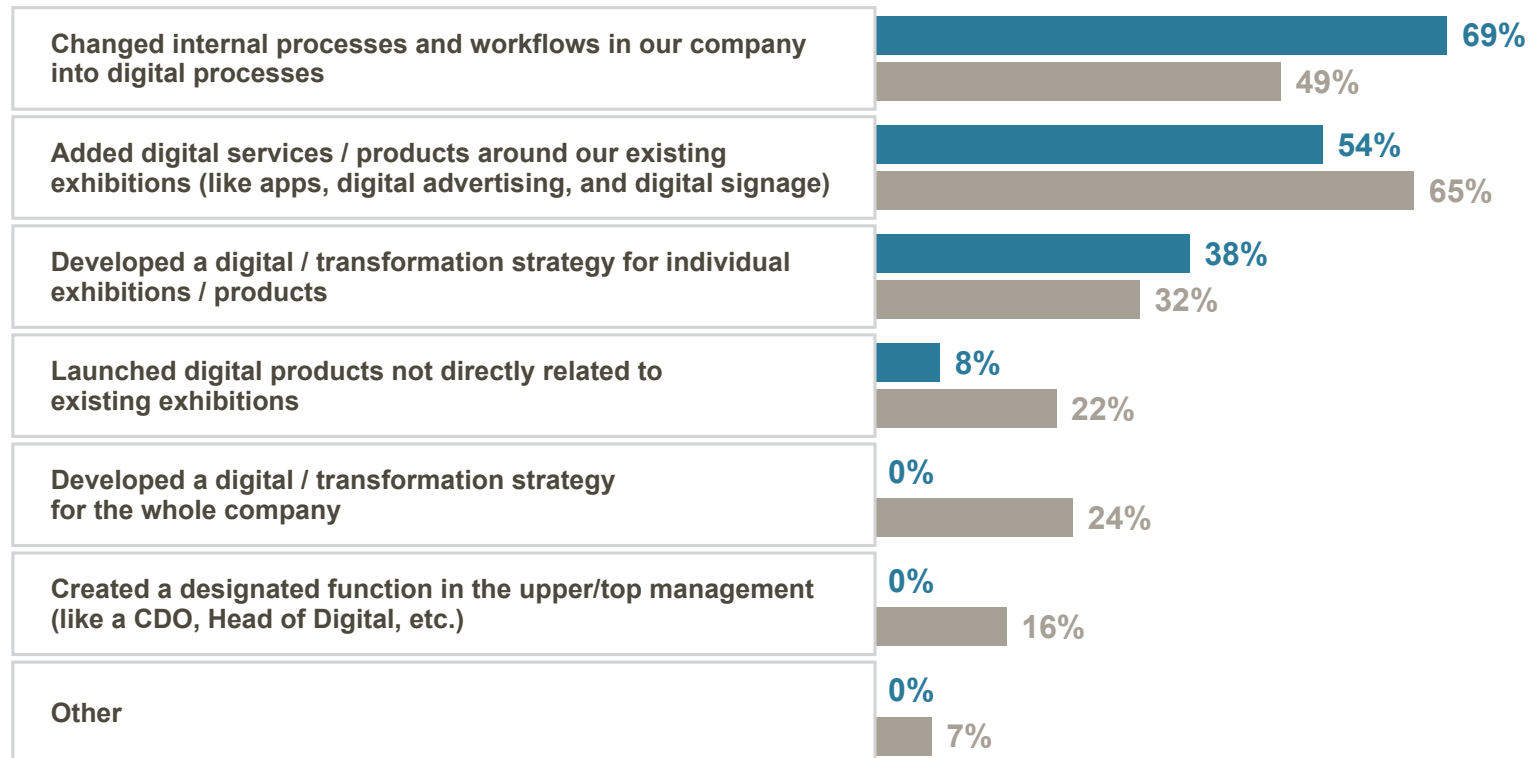
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not





Digitisation: implementation in Brazil and globally

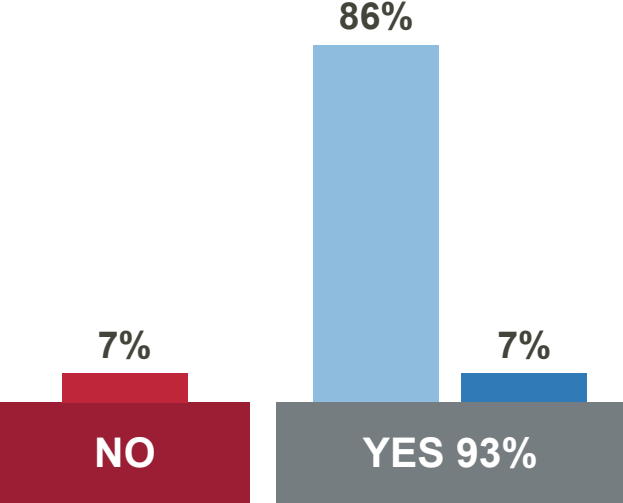
Brazil Global

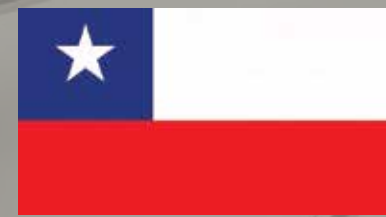




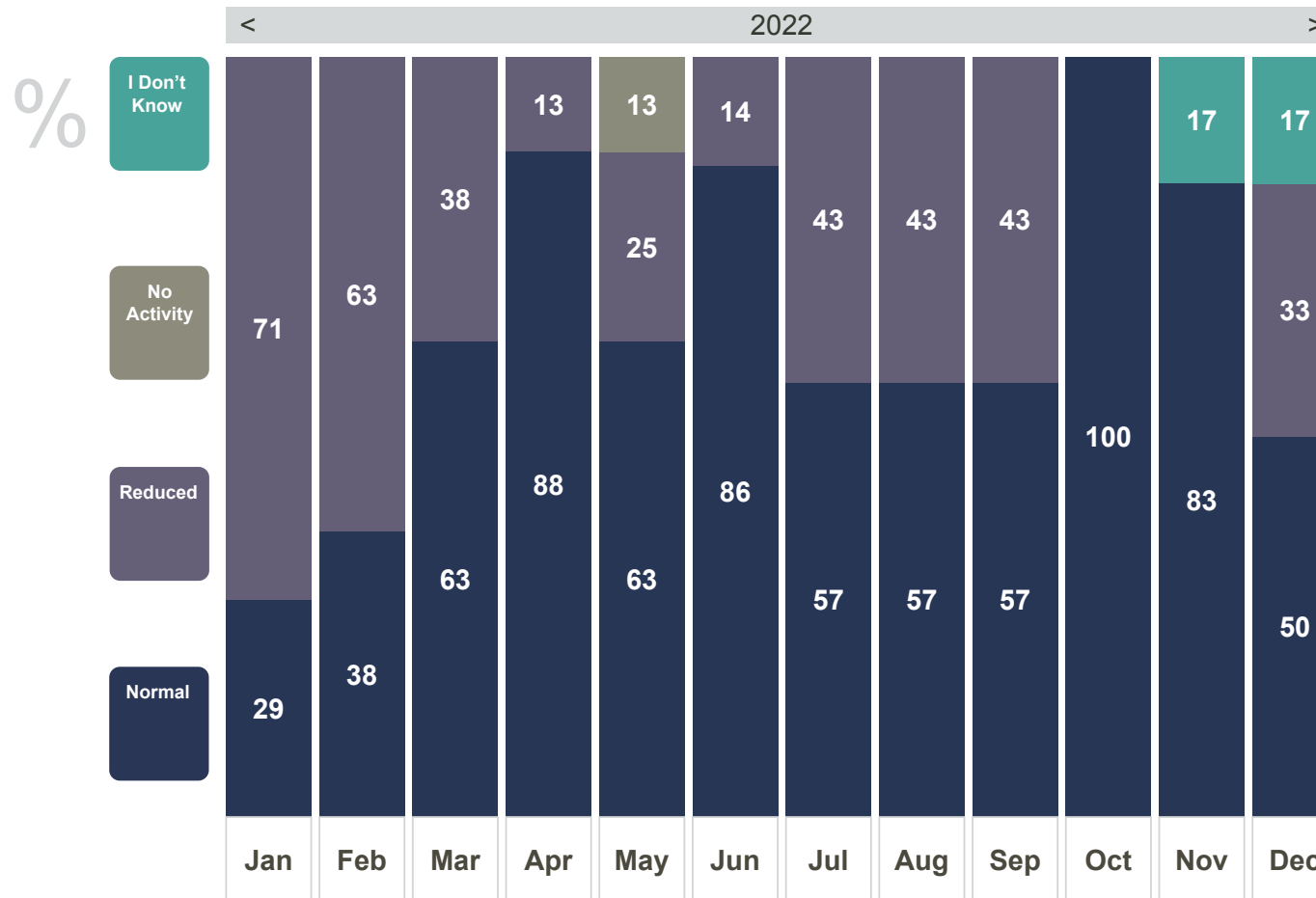
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
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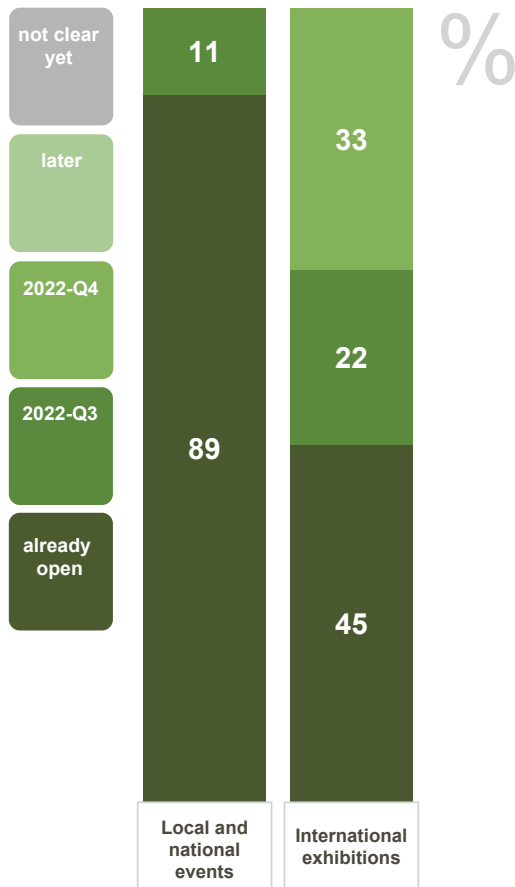


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

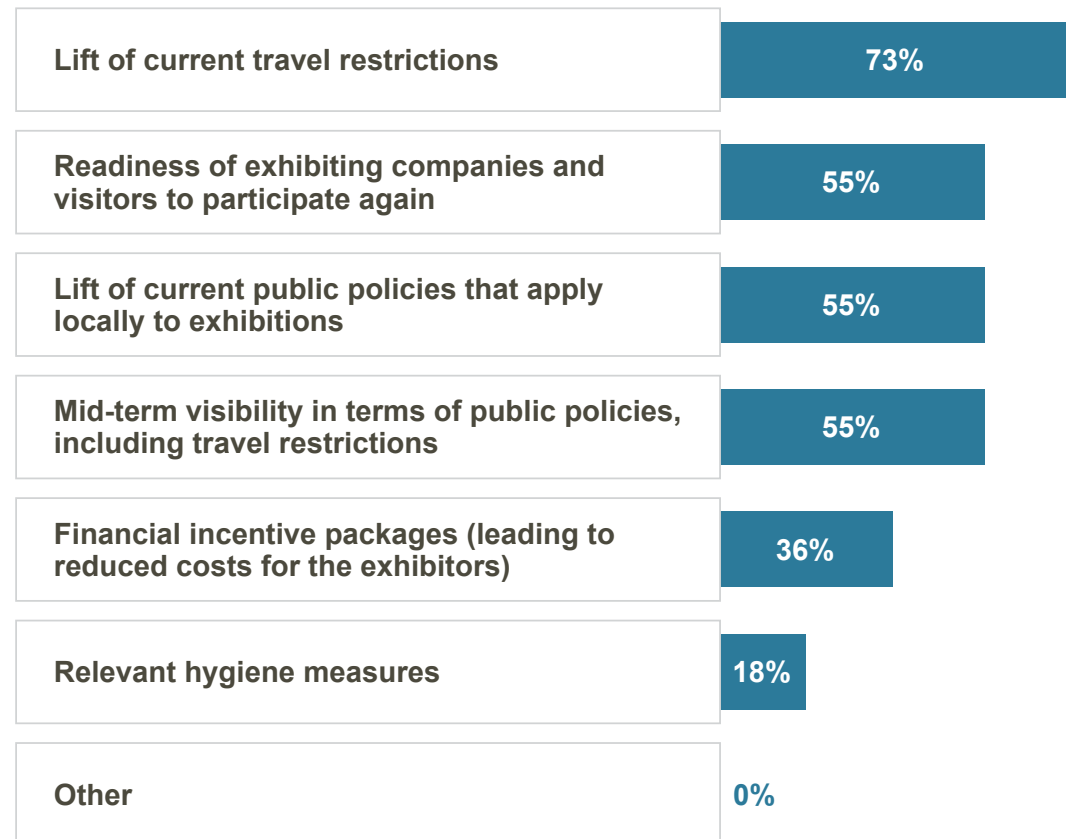




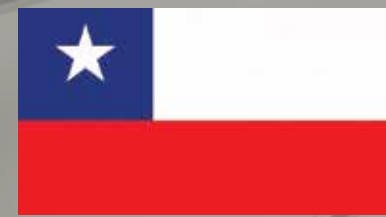
When do you believe exhibitions will open again in your city?



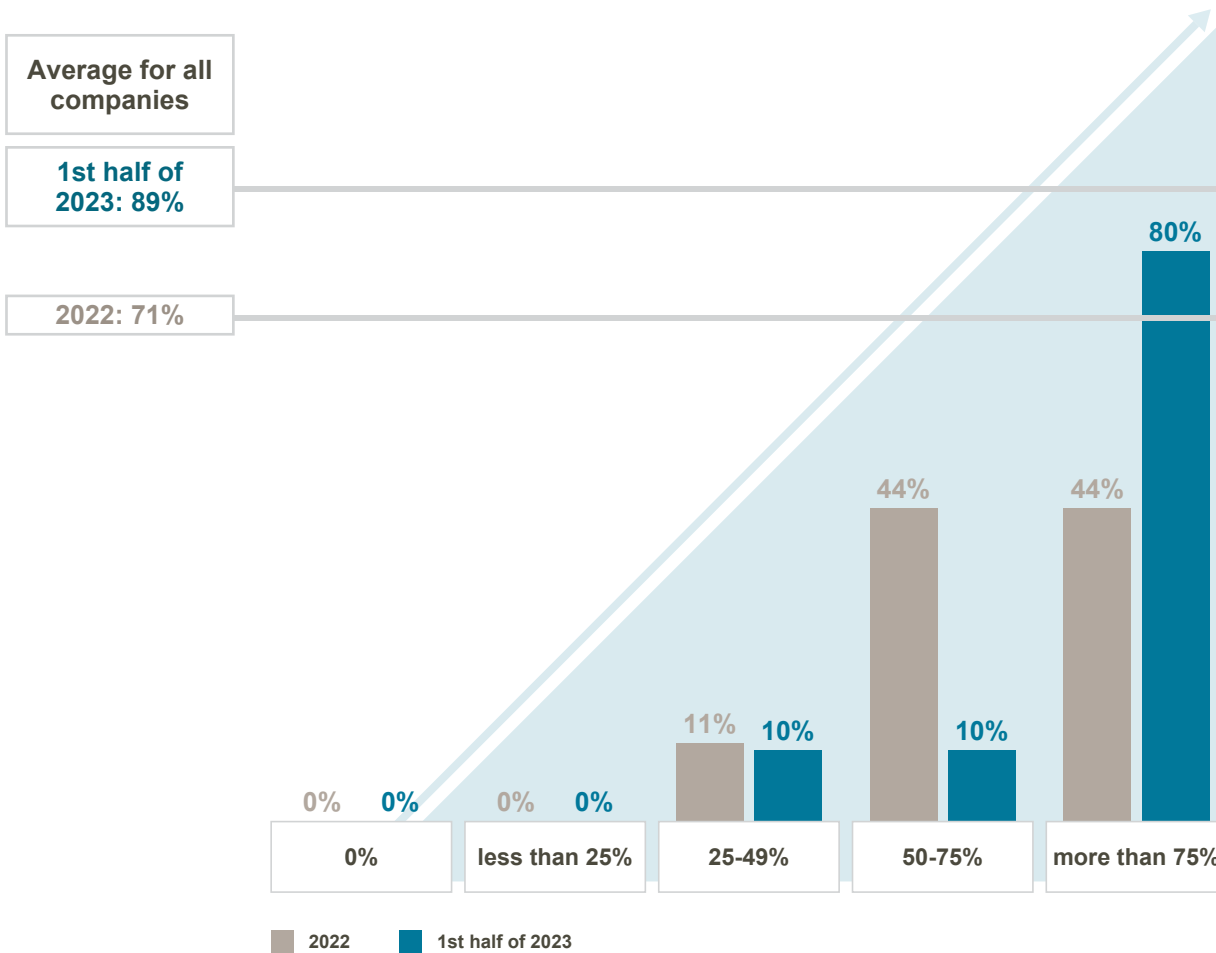
What do you believe would most help the “bounce back” of exhibitions?



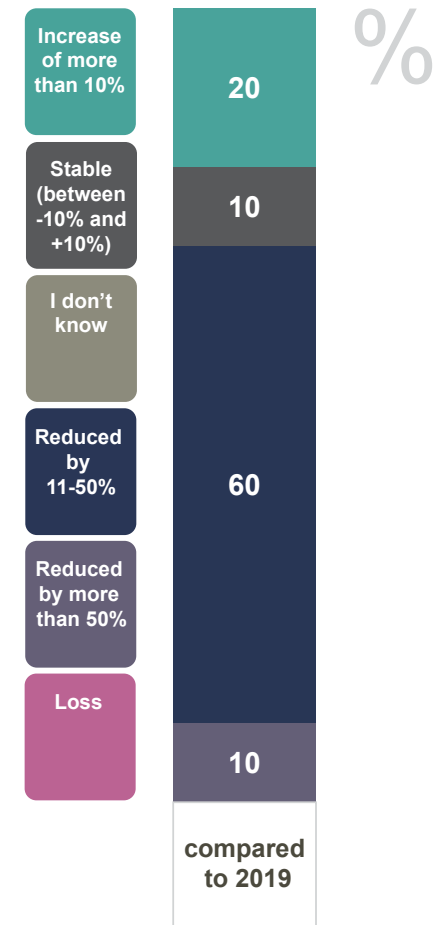
Detailed results for Chile



Revenue compared to 2019



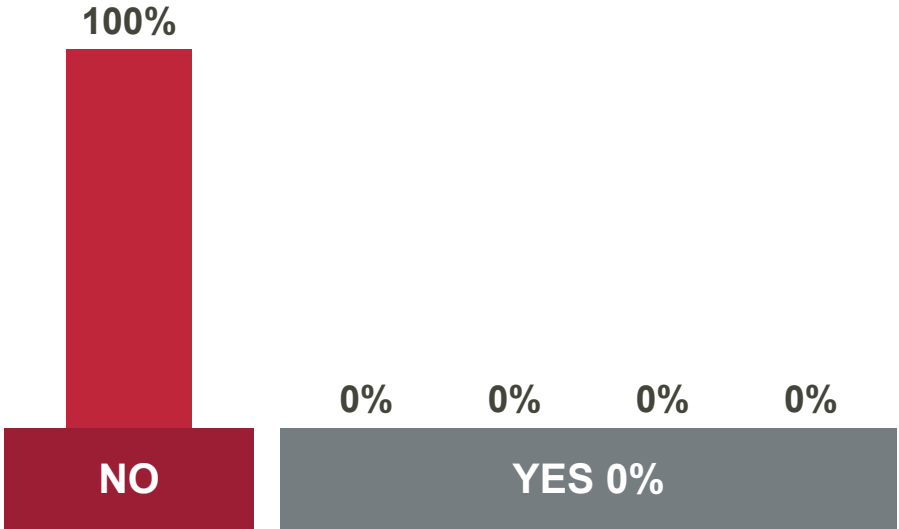
Operating Profits 2021

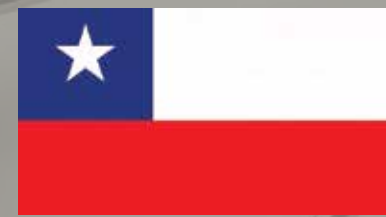




Did your company benefit from public financial support?

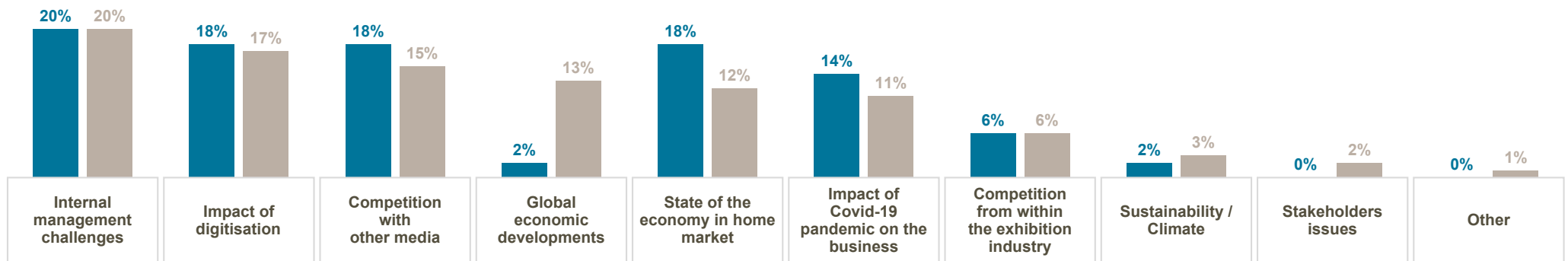
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





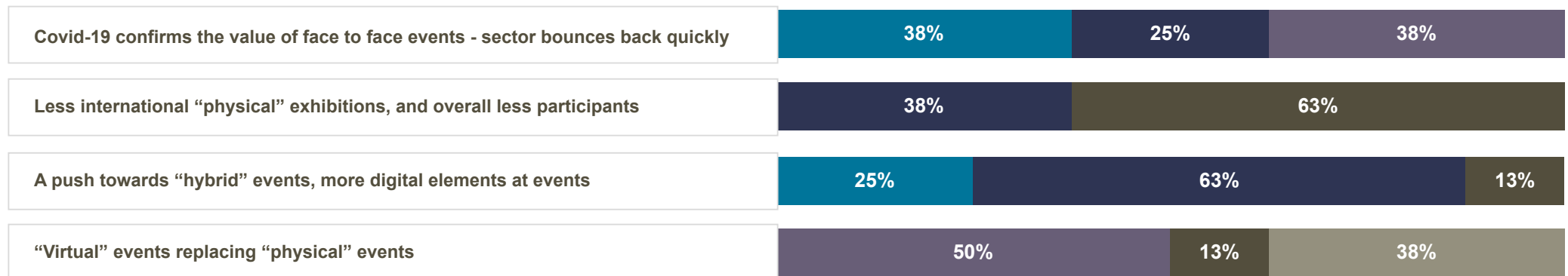
Most important business issues in the exhibition industry

Chile Global



Format of exhibitions in the coming years

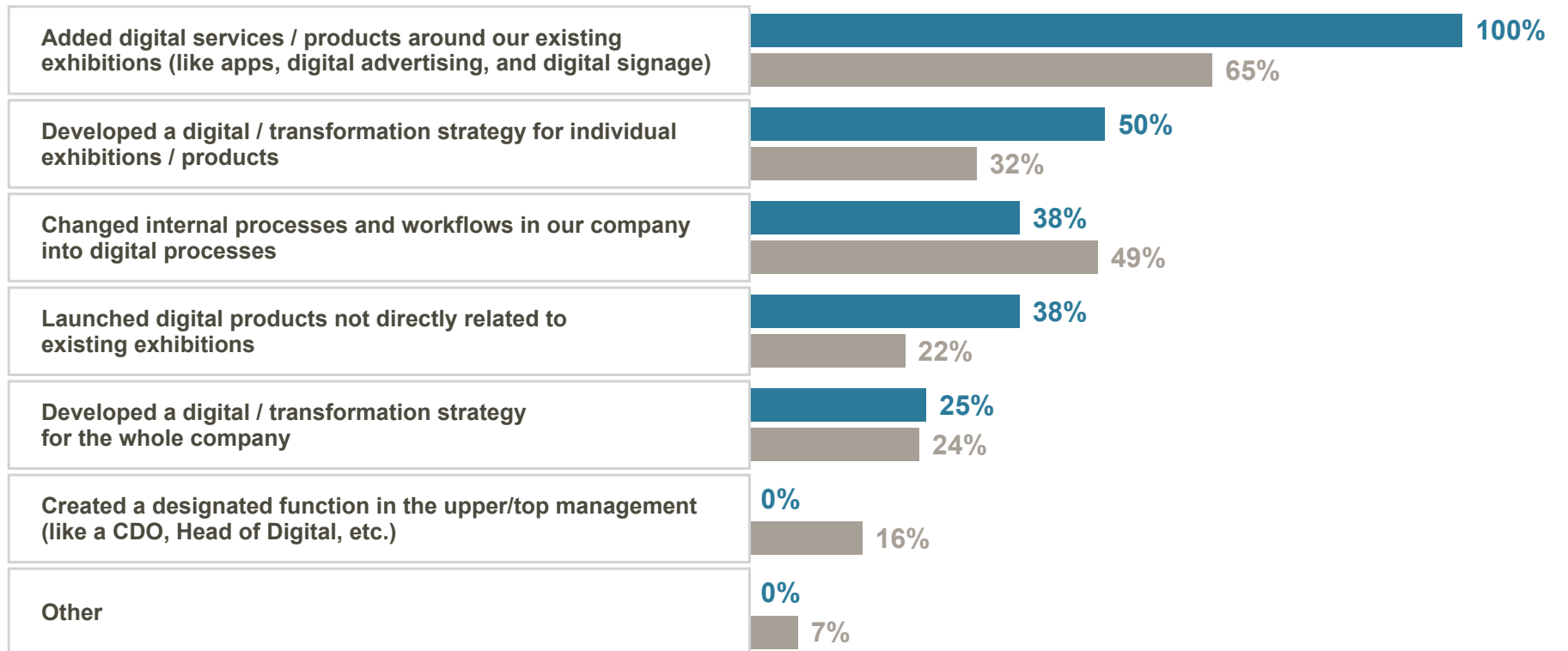
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in Chile and globally

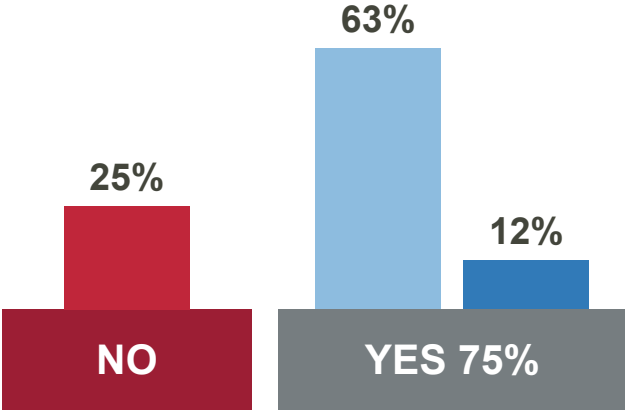
Chile
Global





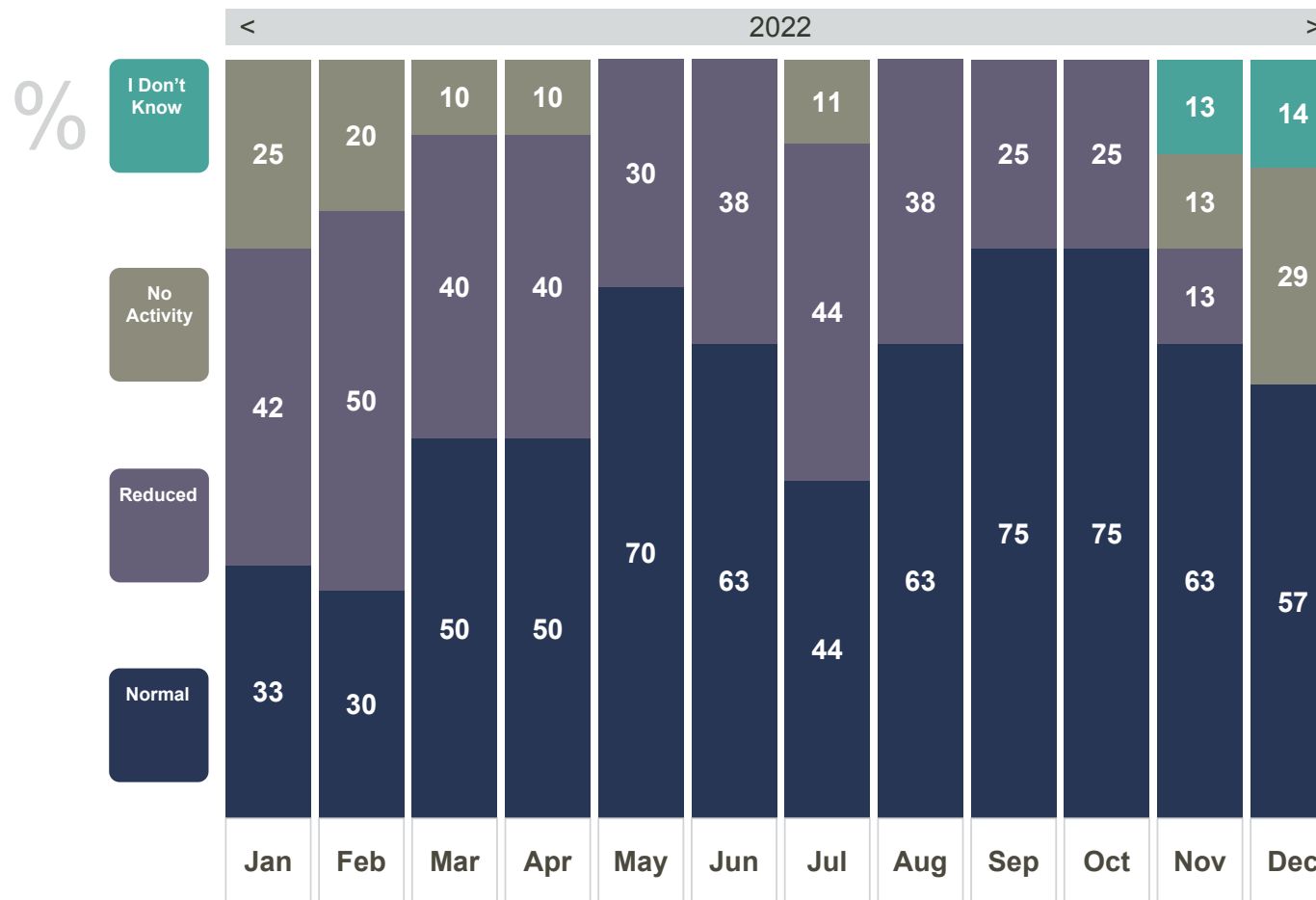
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
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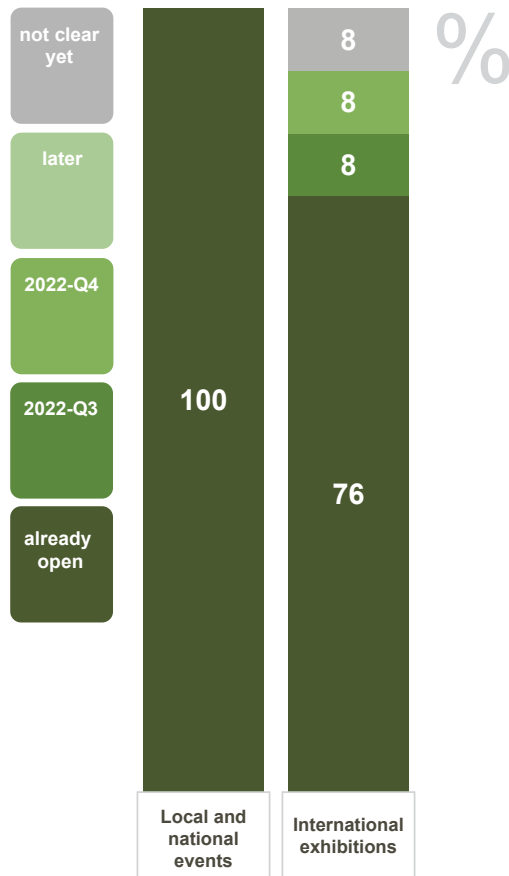


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

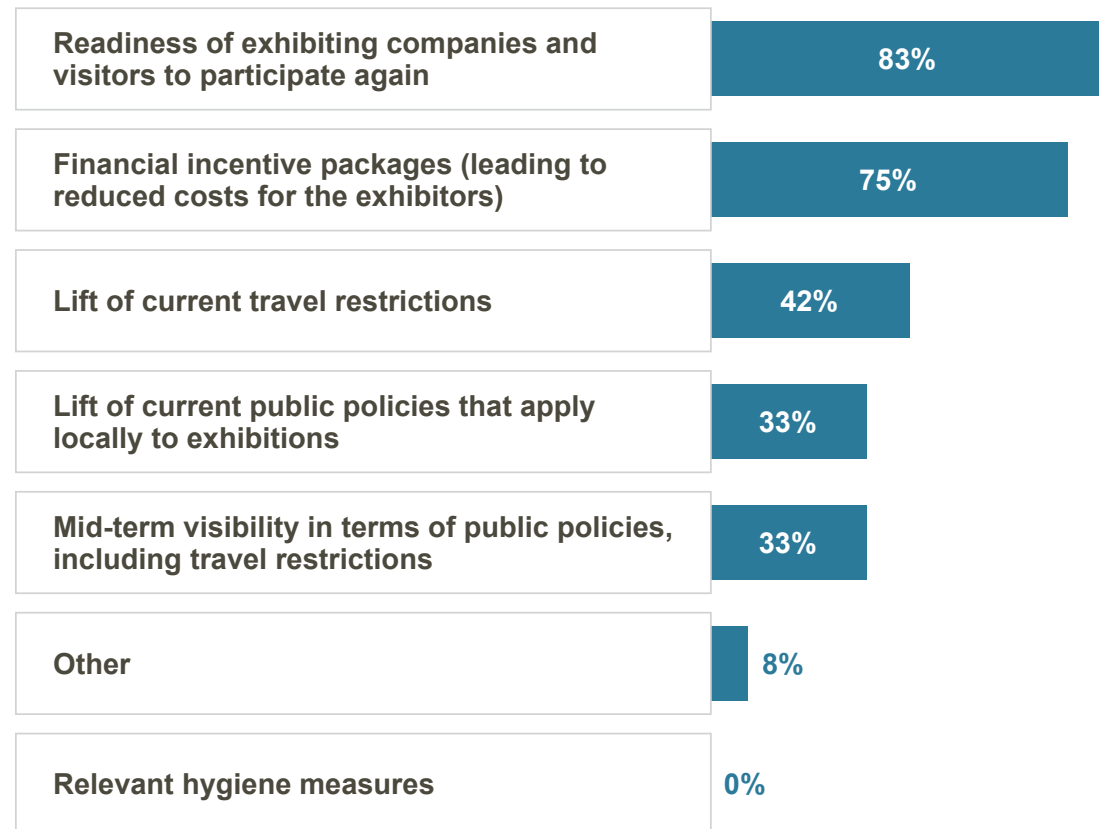




When do you believe exhibitions will open again in your city?

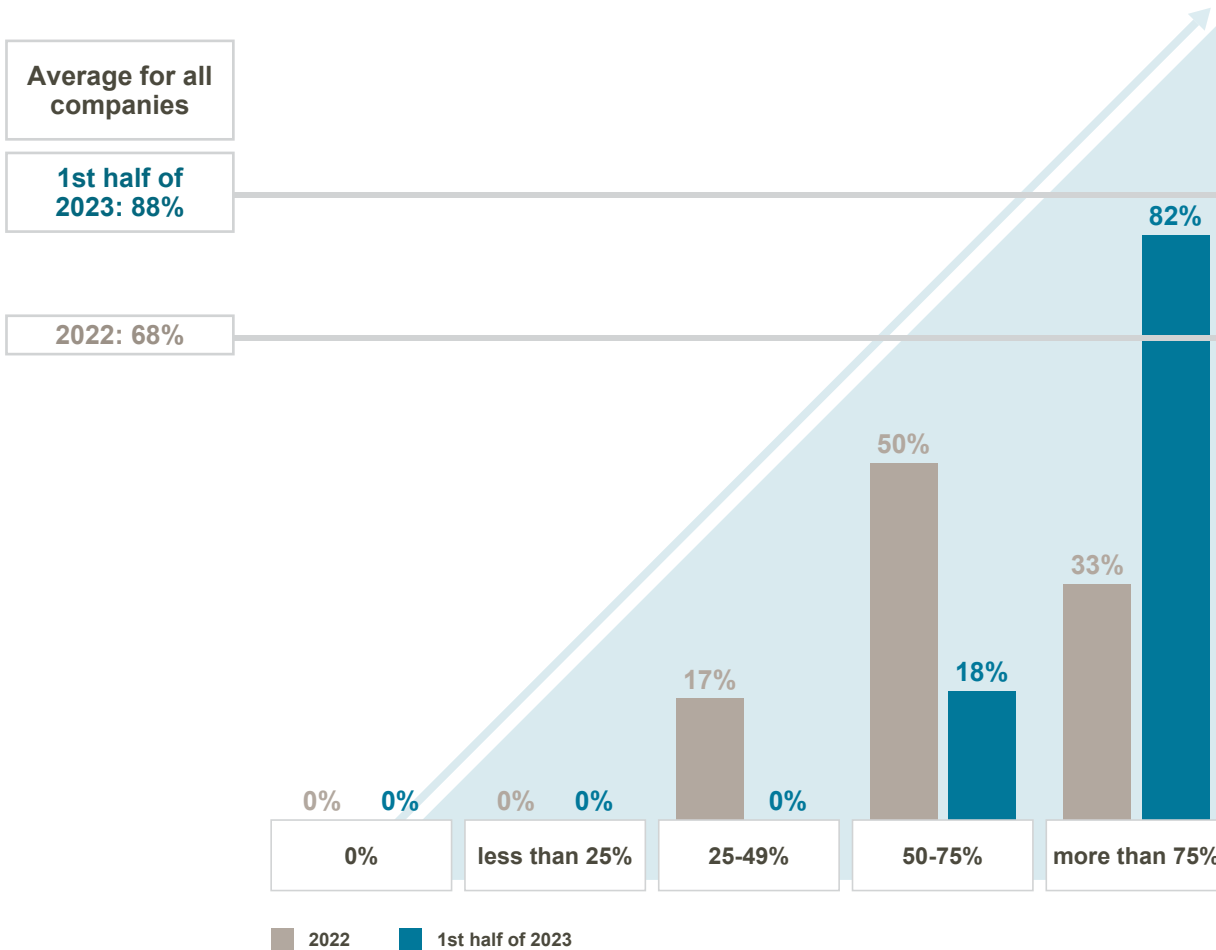


What do you believe would most help the “bounce back” of exhibitions?

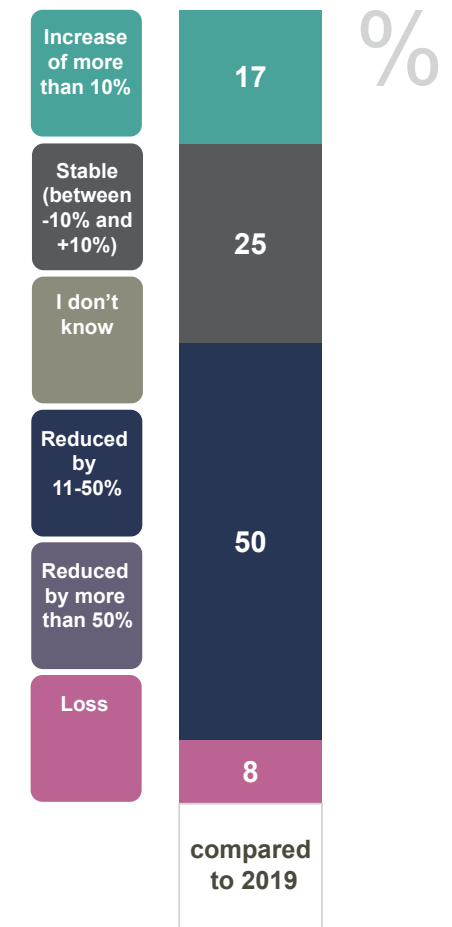




Revenue compared to 2019



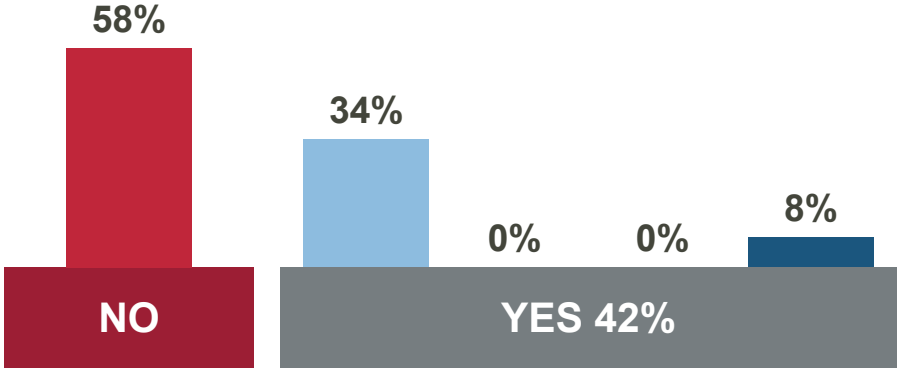
Operating Profits 2021





Did your company benefit from public financial support?

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

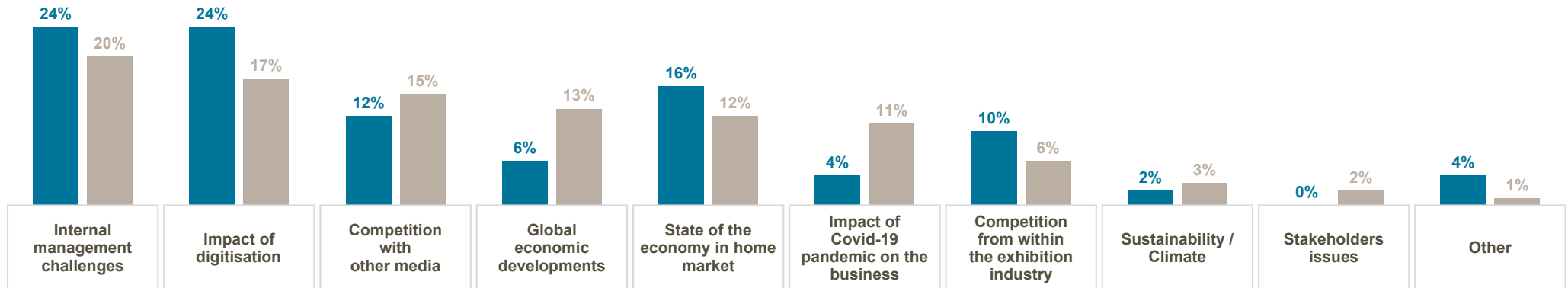




Most important business issues in the exhibition industry

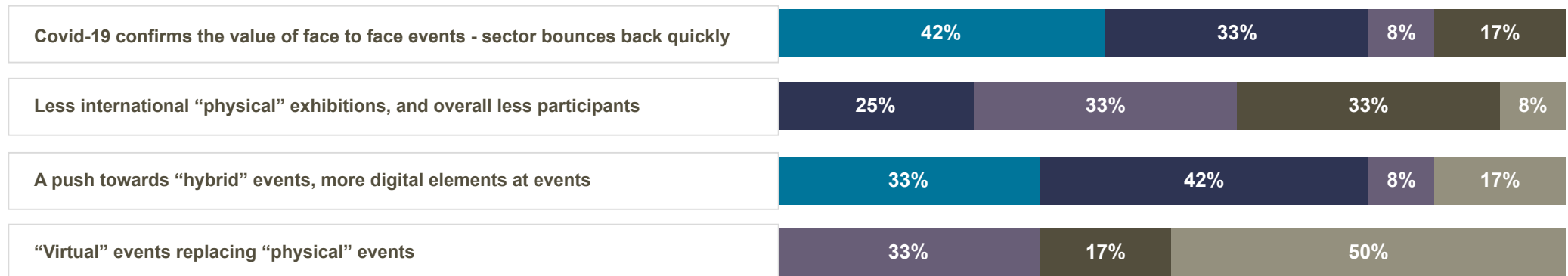
Colombia

Global



Format of exhibitions in the coming years

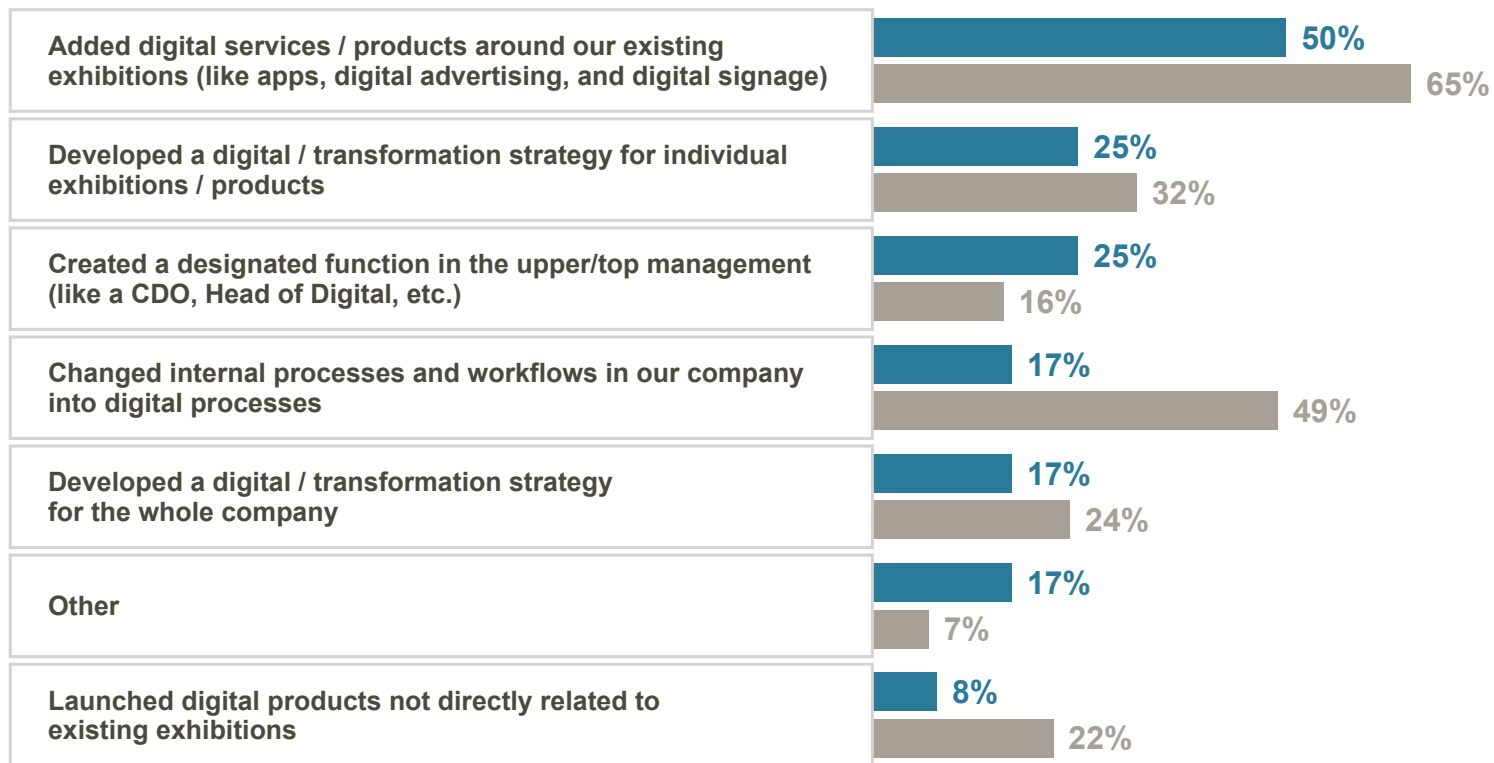
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not





Digitisation: implementation in Colombia and globally

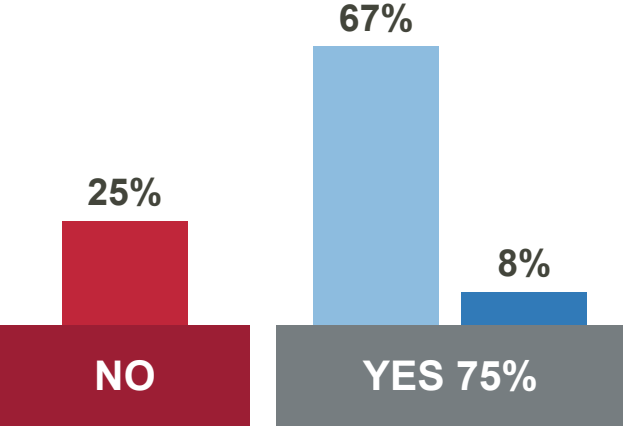
Colombia Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people





Europe

Operations - Reopening Exhibitions Europe

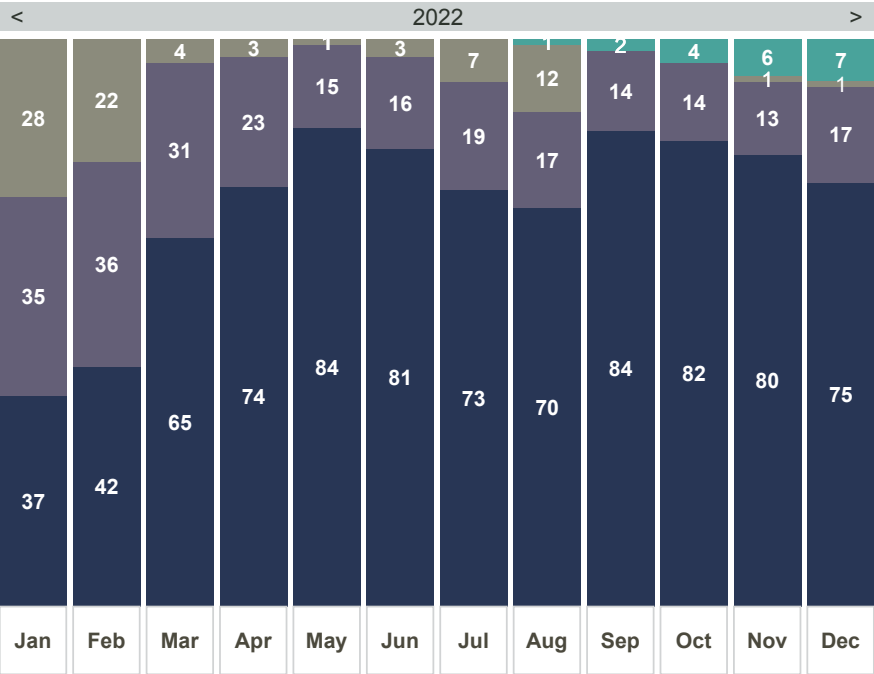


Situation of the industry operations for the 1st half of 2022, and current predictions for the 2nd half of 2022

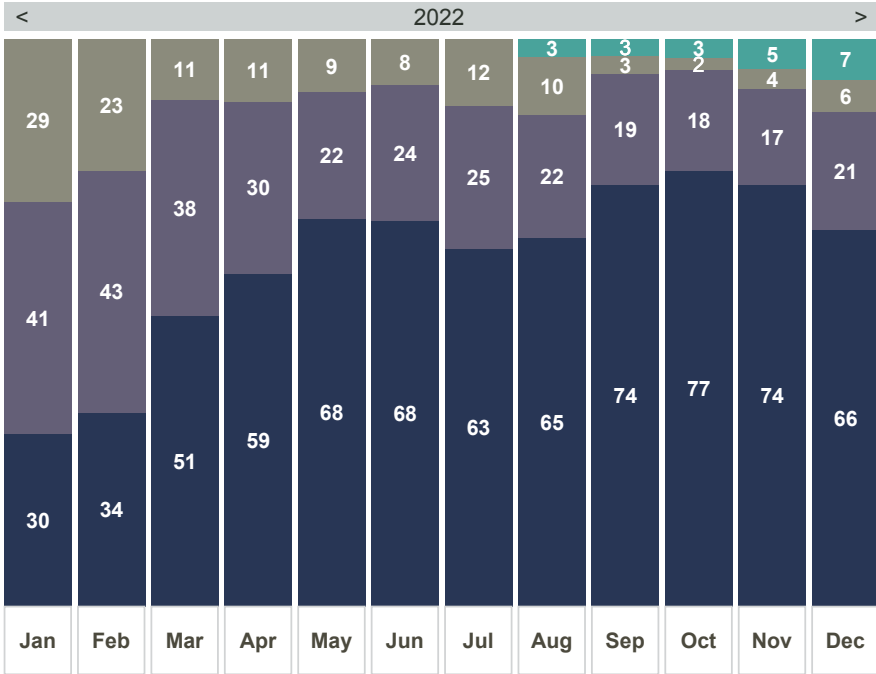


%

Europe



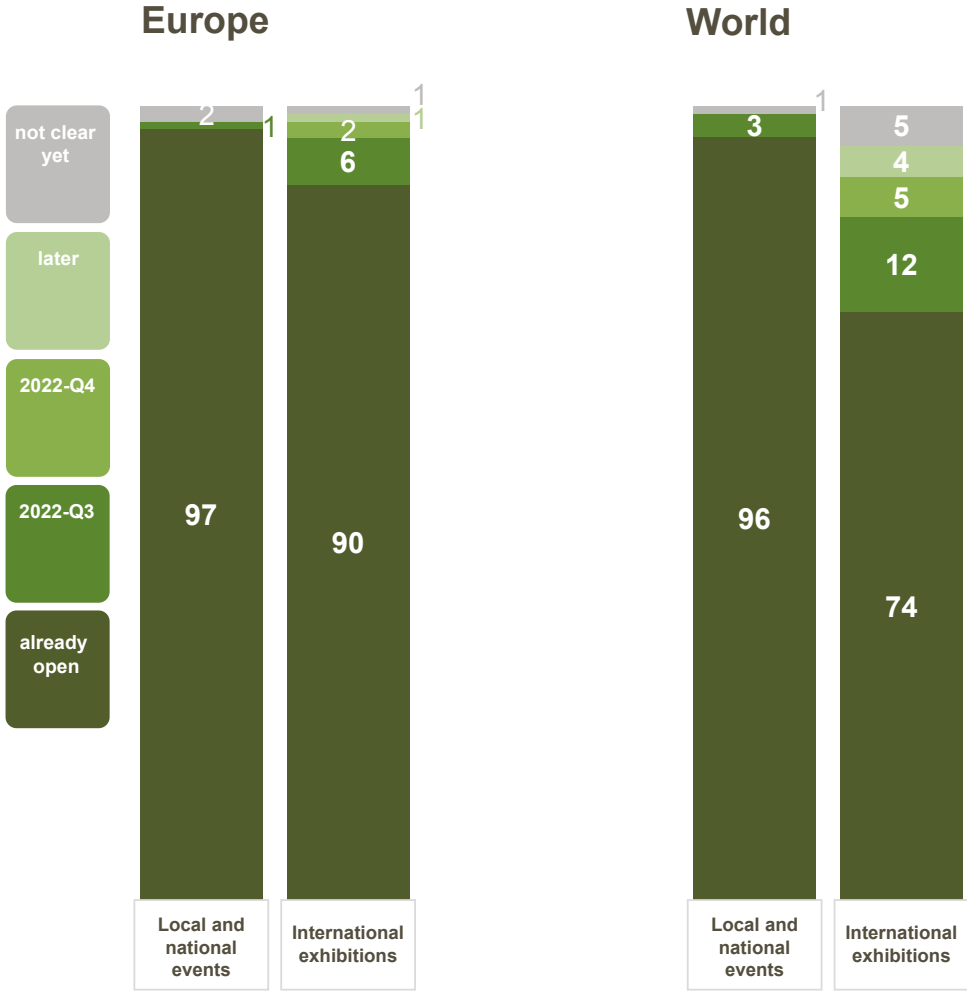
World



Operations - Reopening Exhibitions Europe



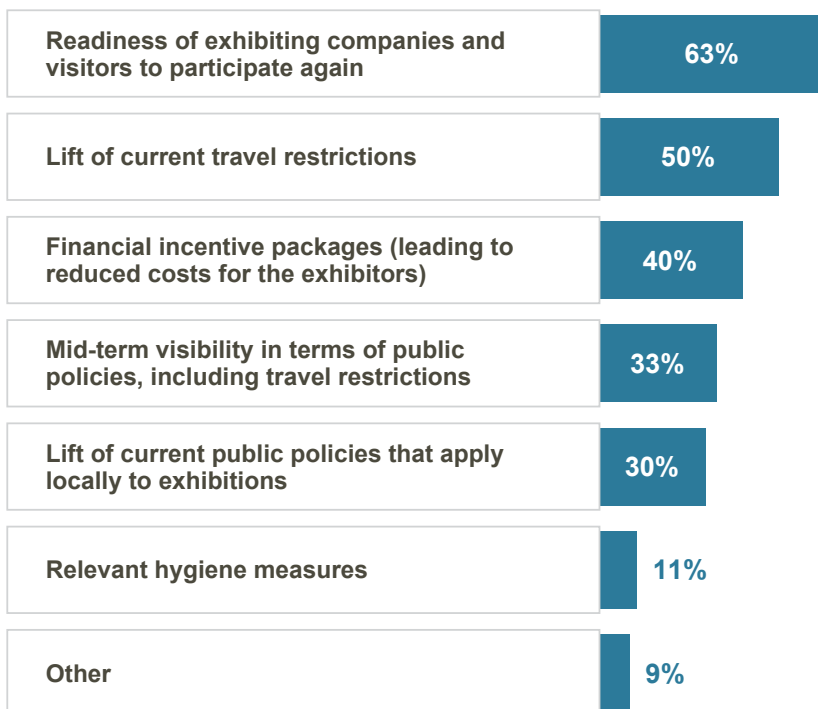
When do you believe exhibitions will open again in your city?



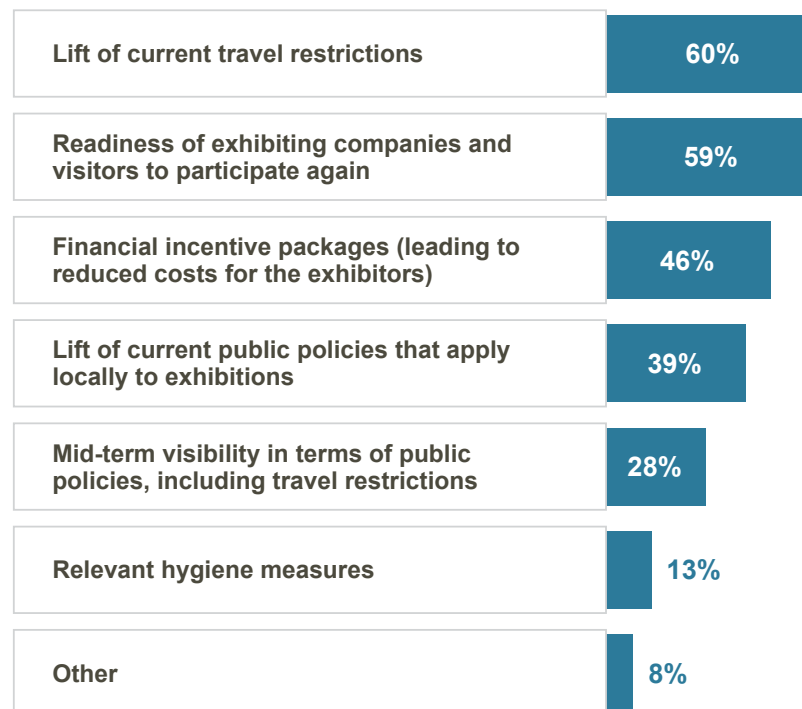
%

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

Europe

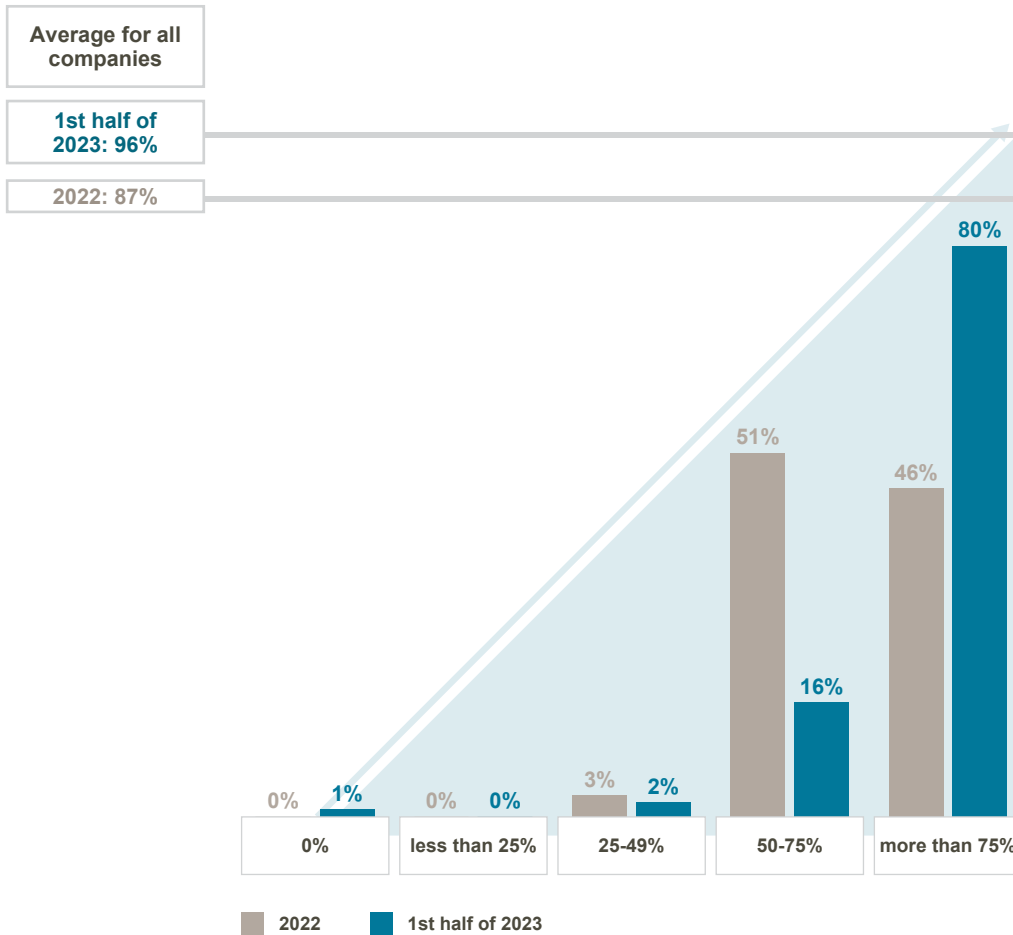


World

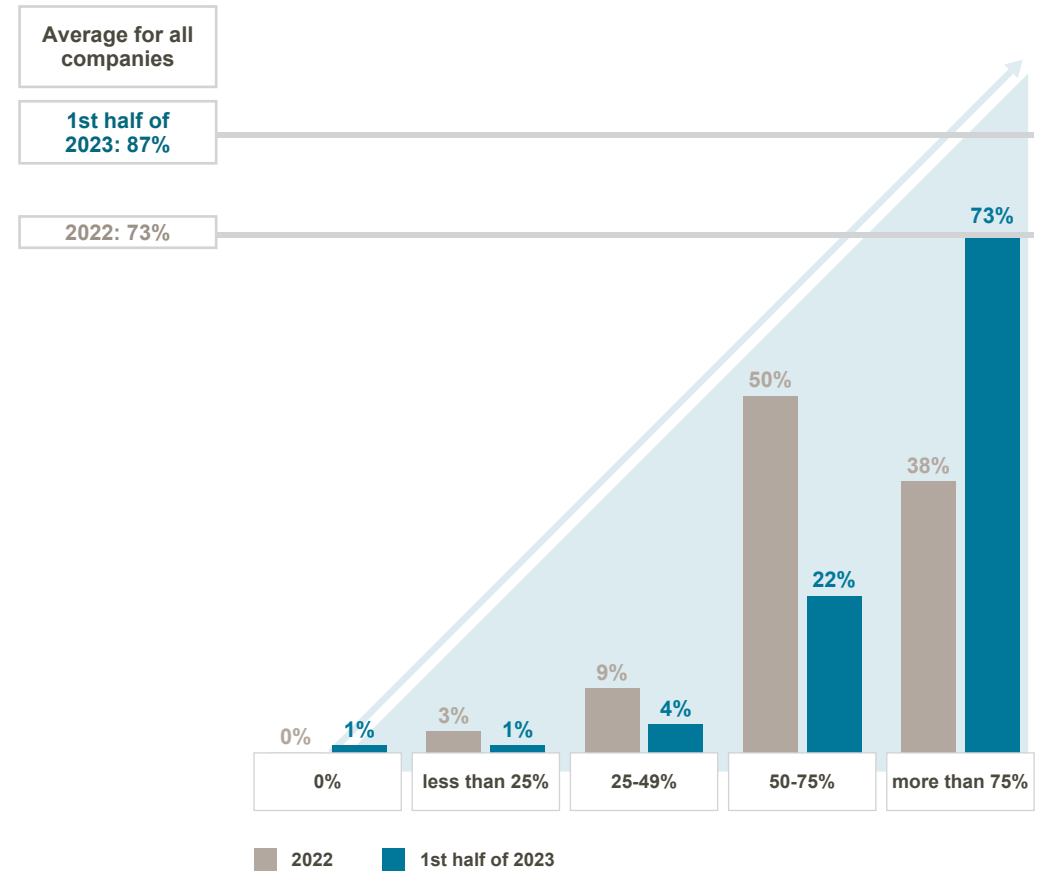


Revenue compared to 2019

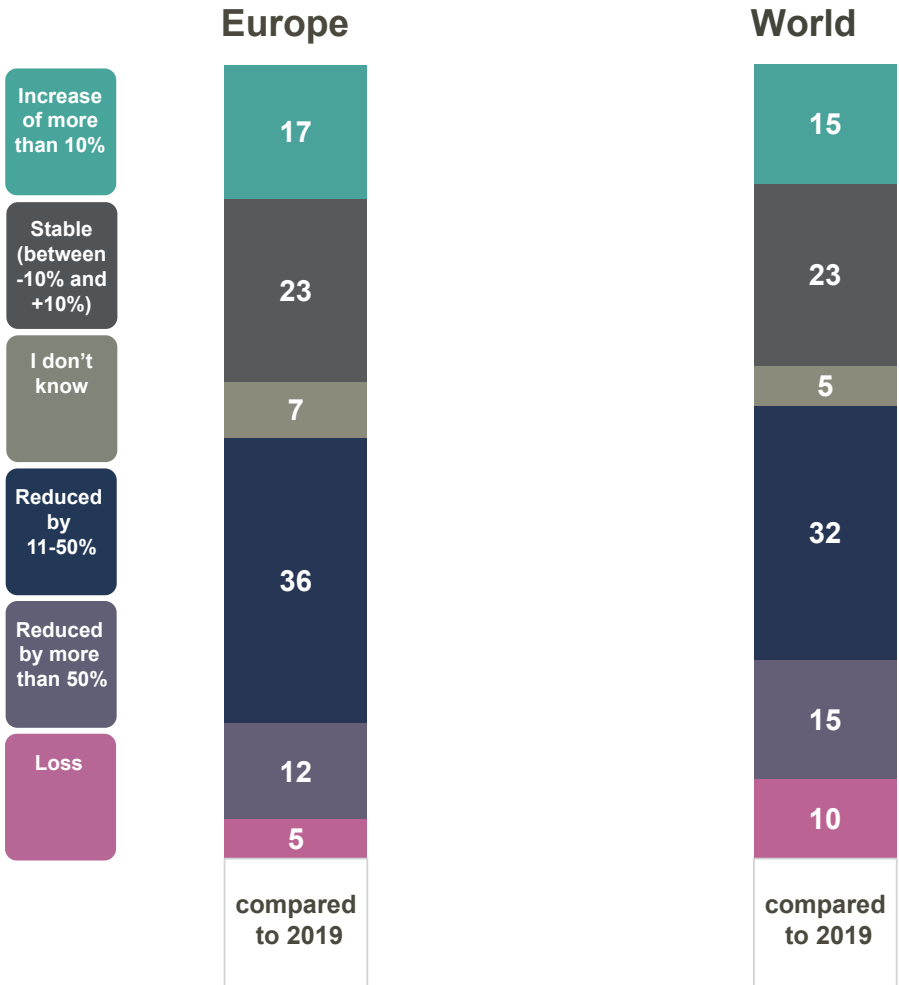
Europe



World



Operating profit 2019 Europe

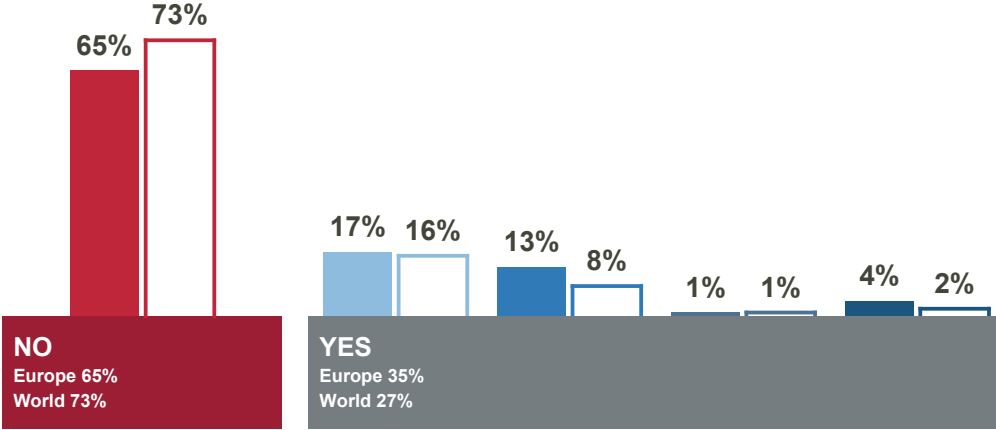


%

Did your company benefit from public financial support?

Europe World

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

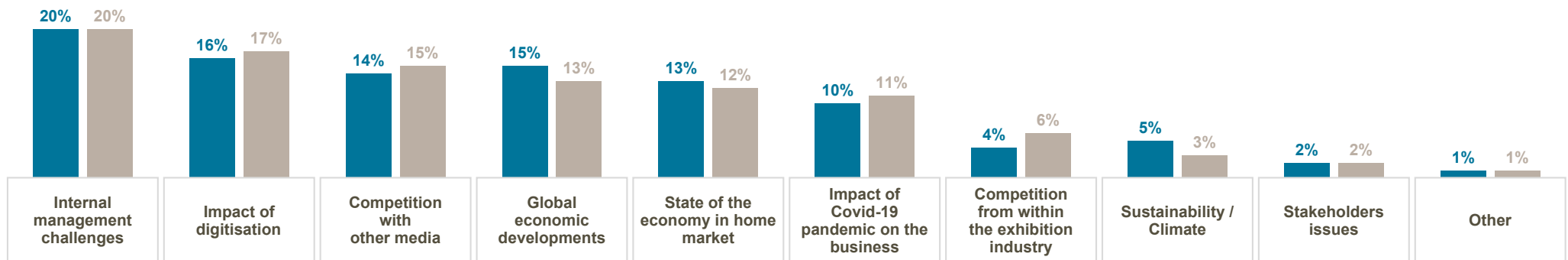


Most Important Business Issues - Format of Exhibitions - Europe

Most important business issues in the exhibition industry

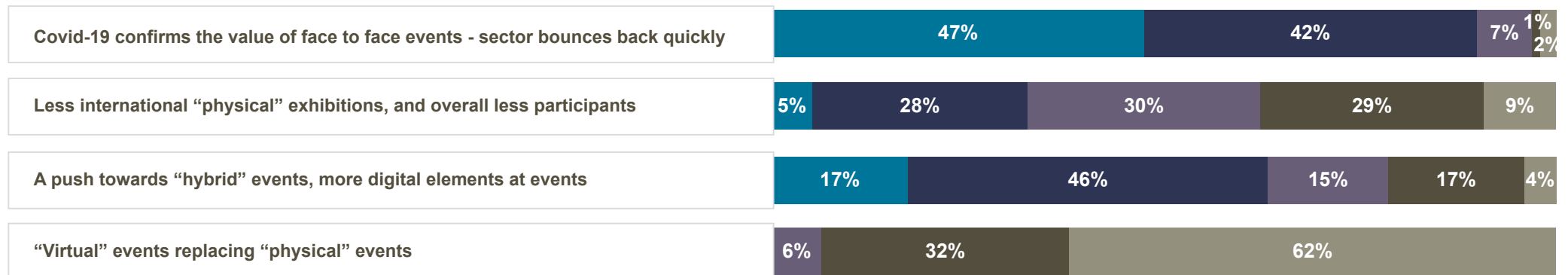
Europe

Global



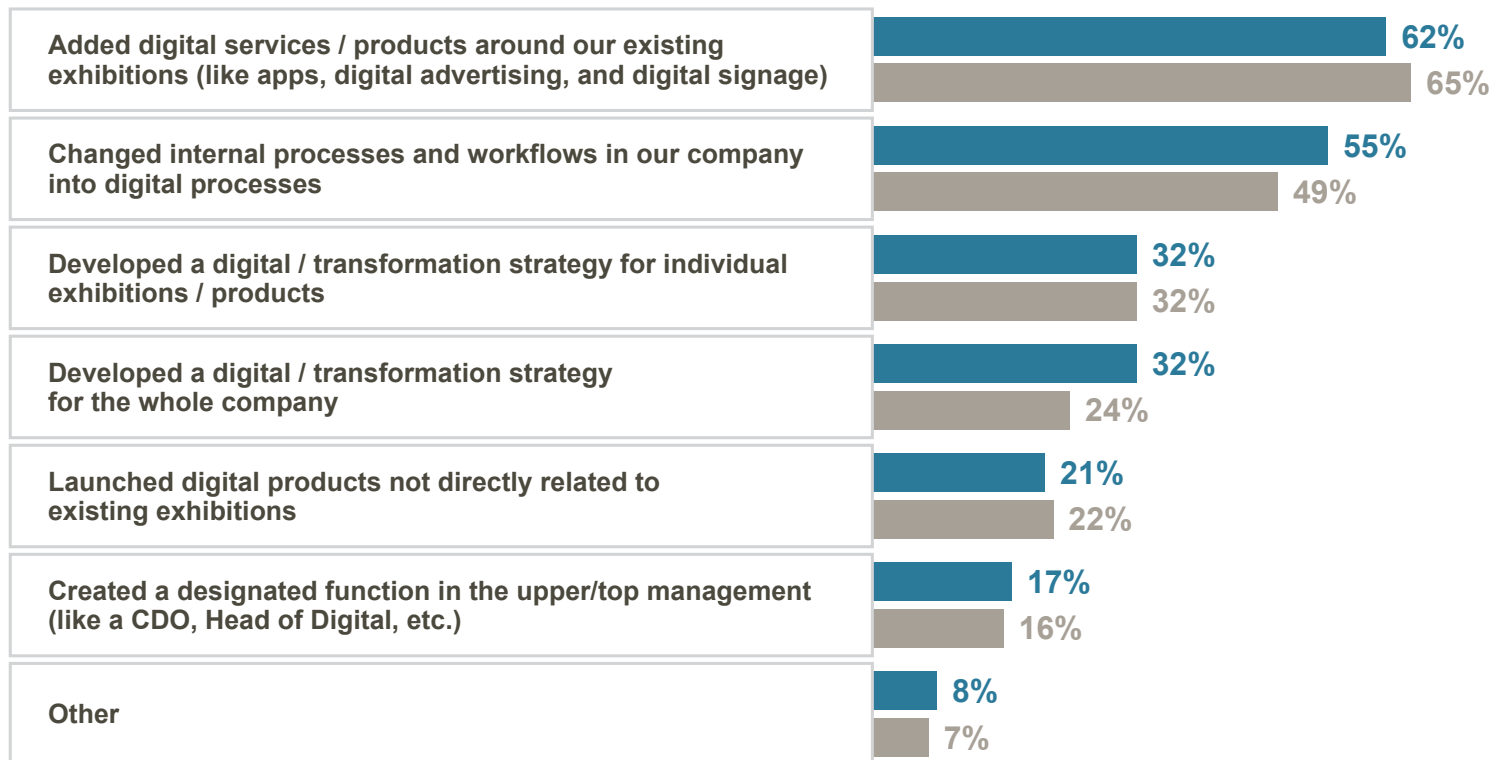
Format of exhibitions in the coming years

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



Digitisation: implementation in Europe and globally

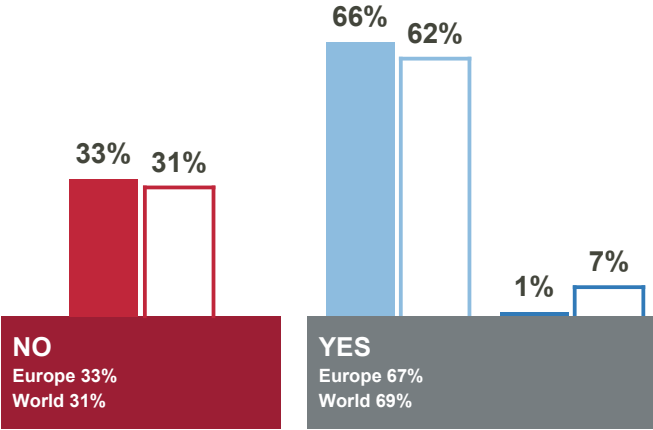
Europe Global



HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

Europe World

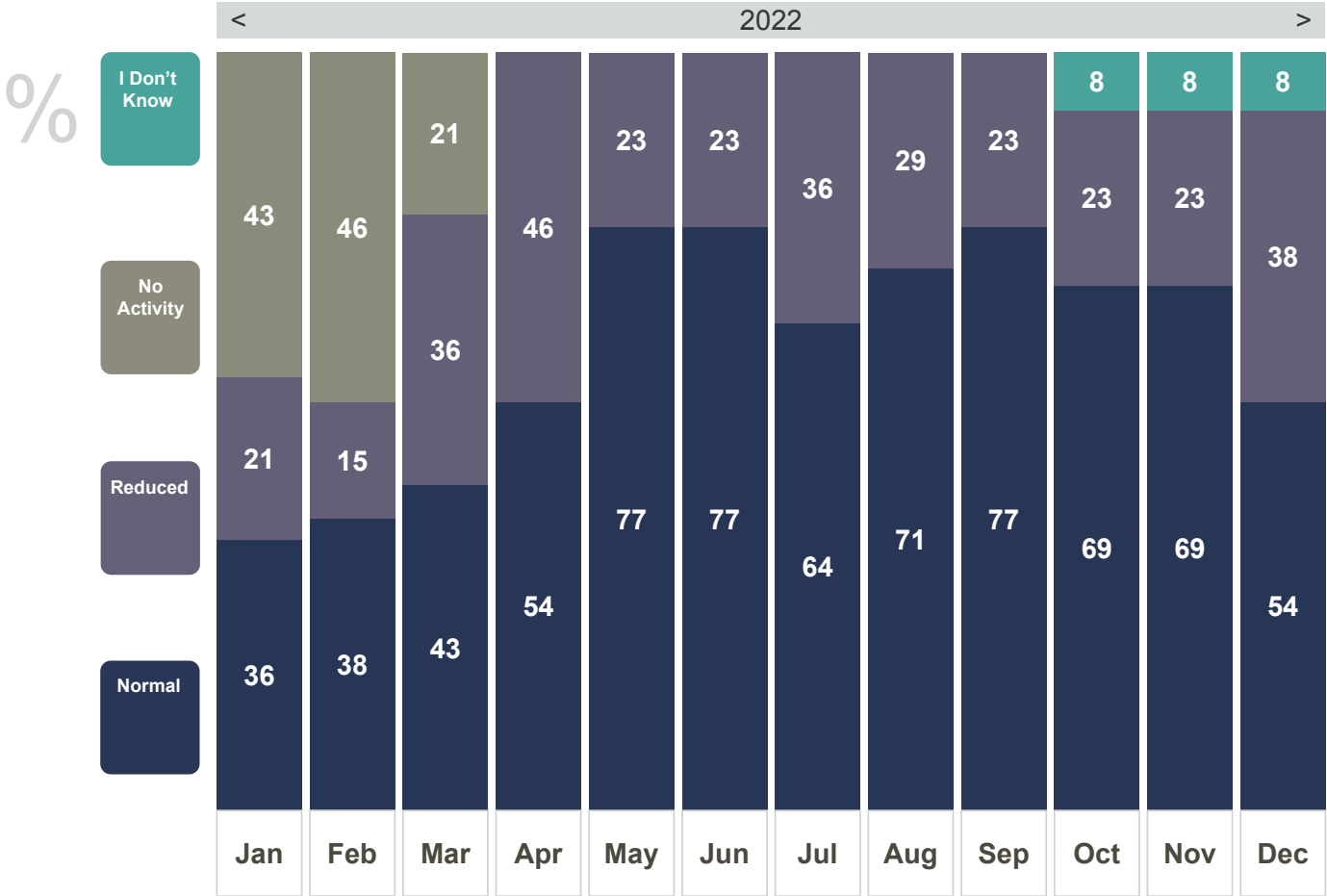
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



Detailed results for Germany

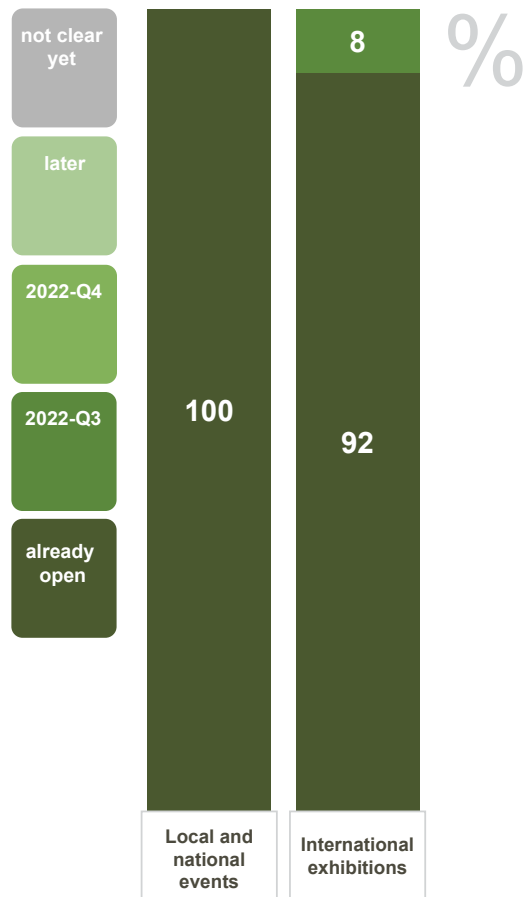


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022





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

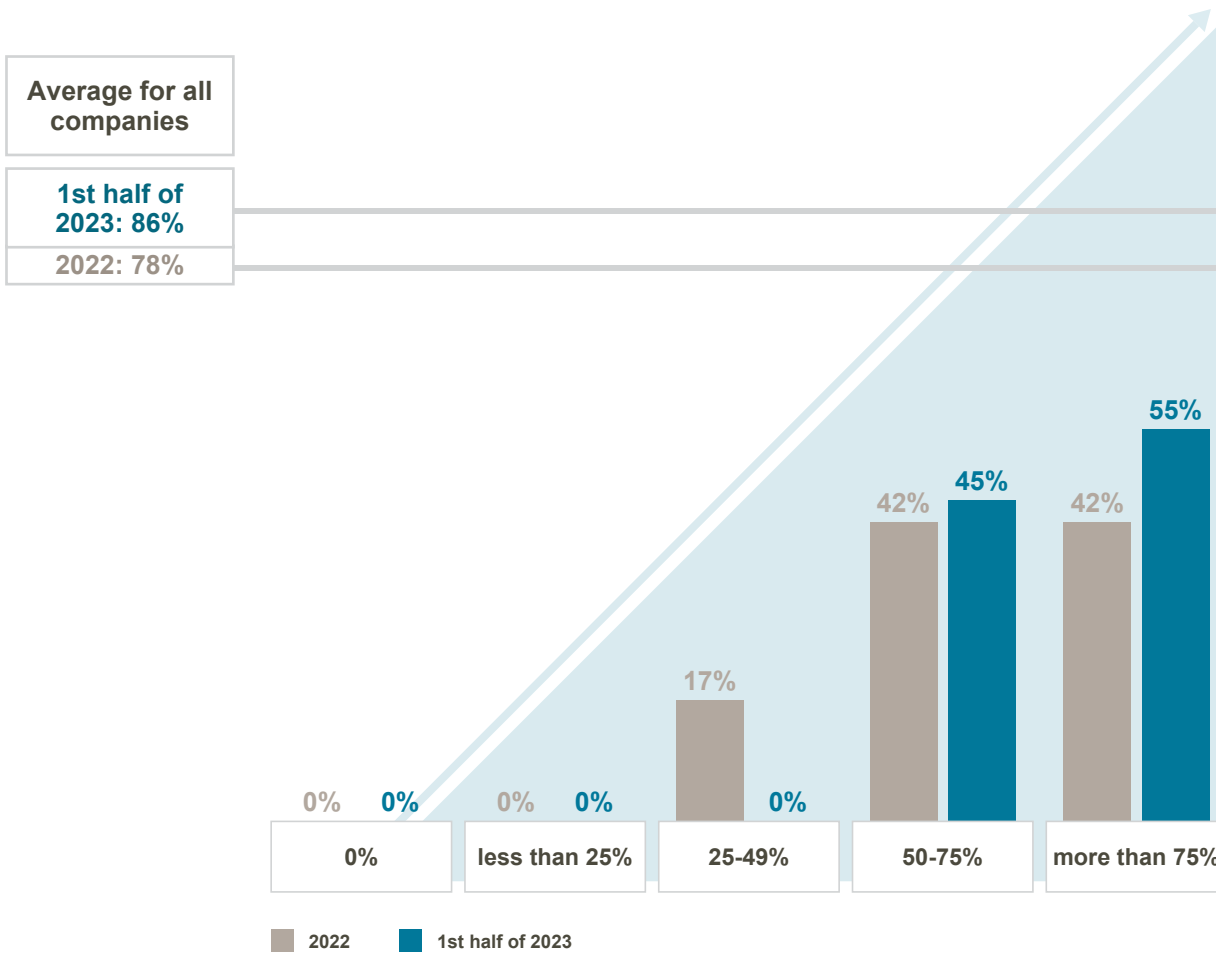


What do you believe would most help the “bounce back” of exhibitions?

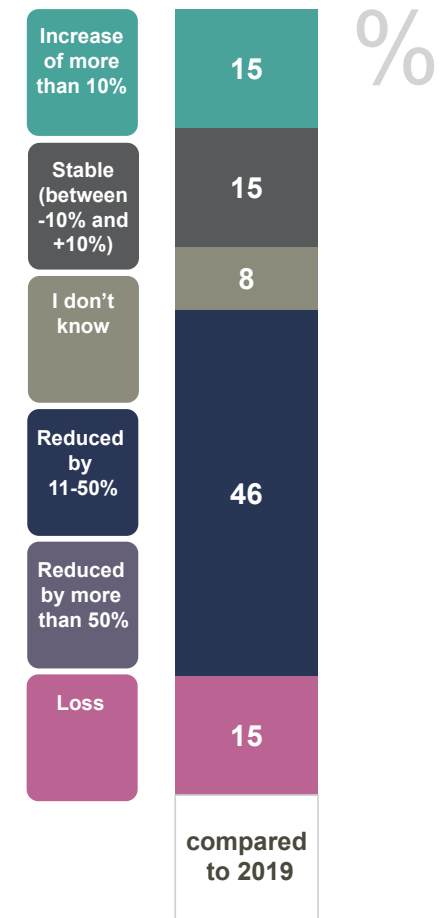




Revenue compared to 2019



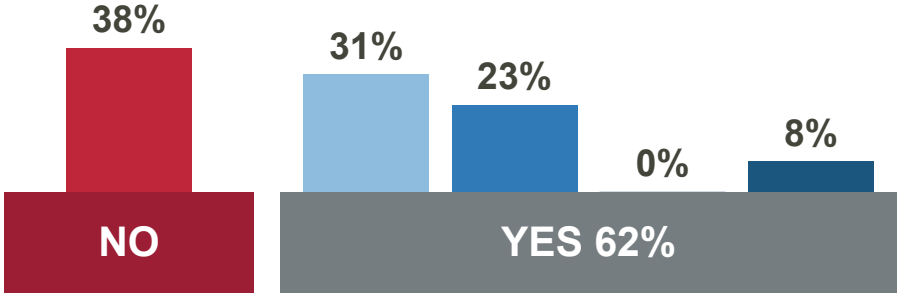
Operating Profits 2021





Did your company benefit from public financial support?

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

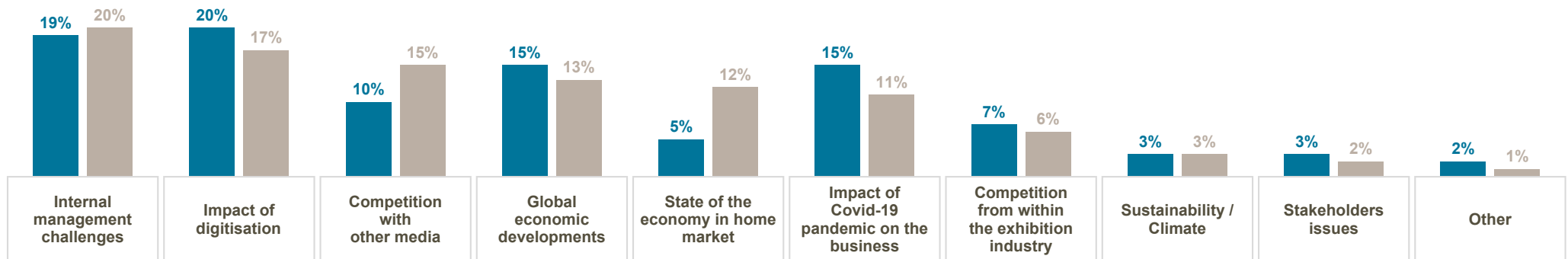




Most important business issues in the exhibition industry

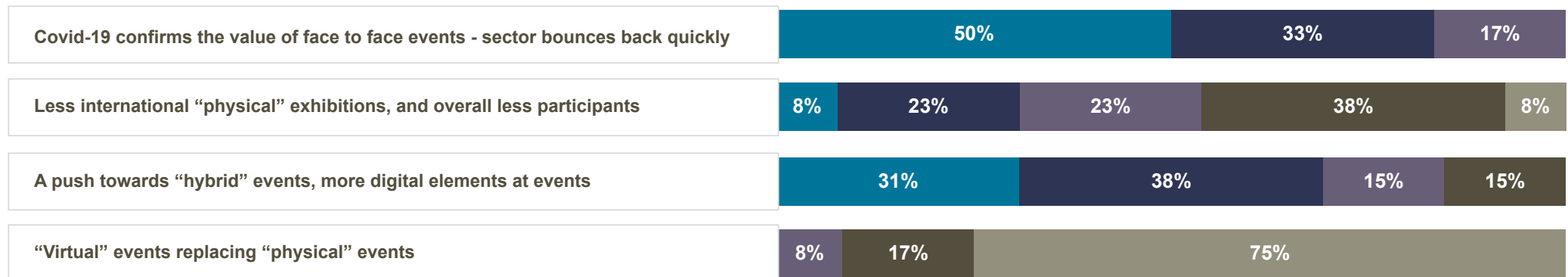
Germany

Global



Format of exhibitions in the coming years

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





Digitisation: implementation in Germany and globally

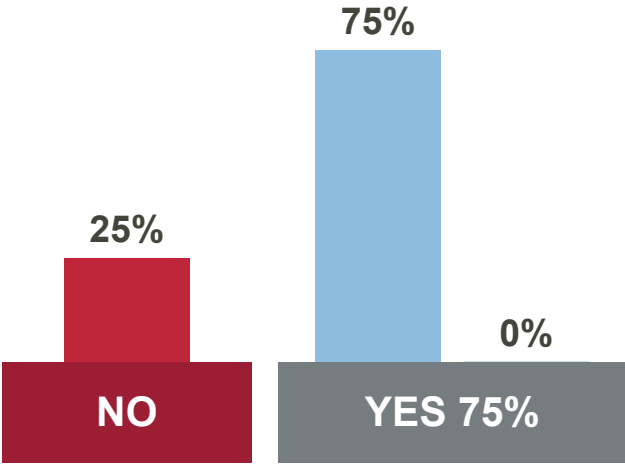
Germany
Global

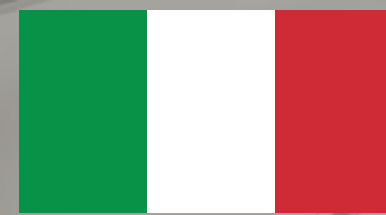




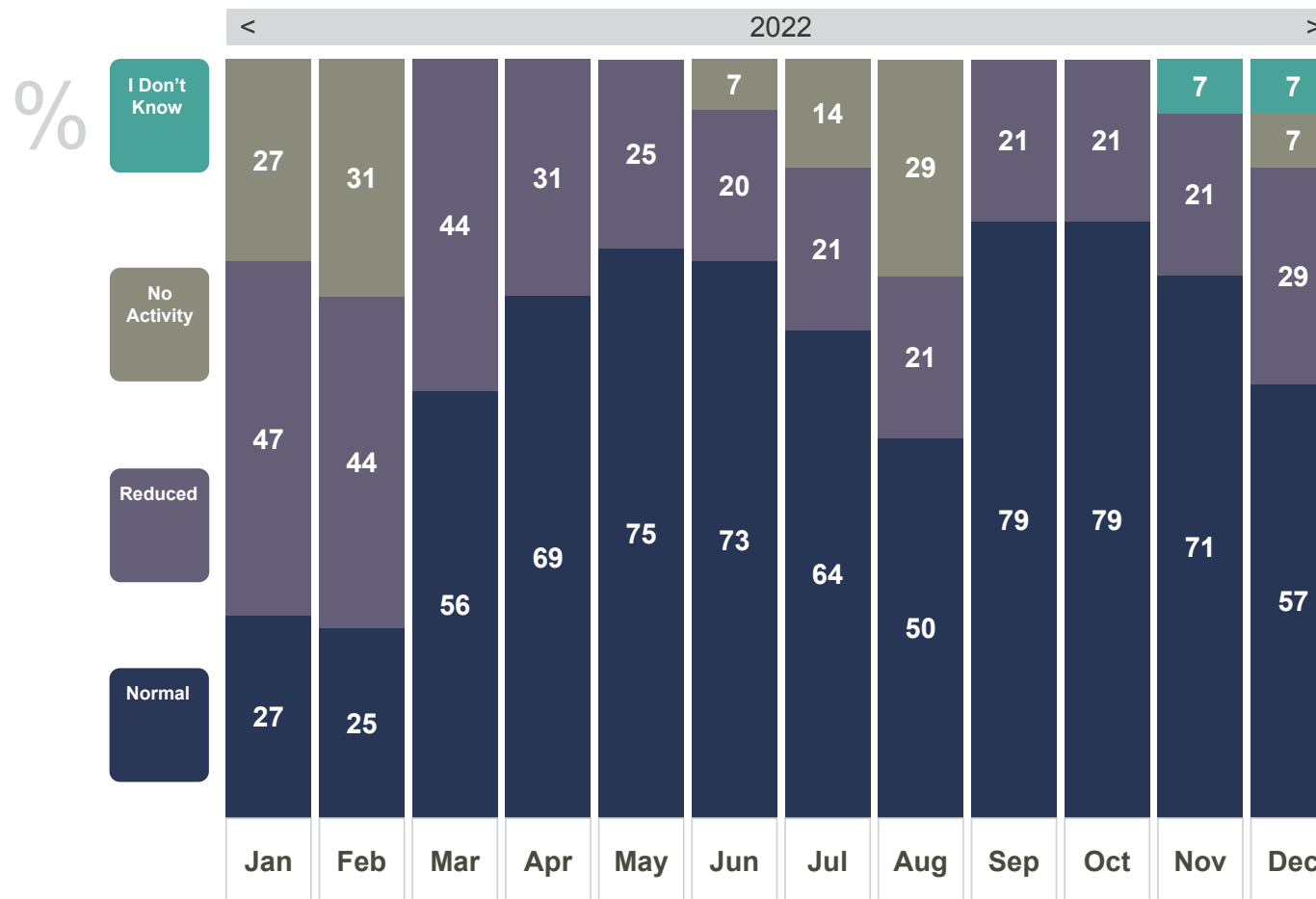
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

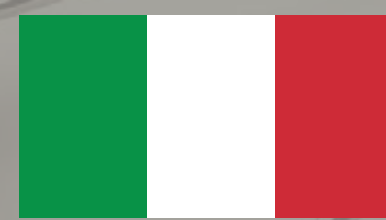
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



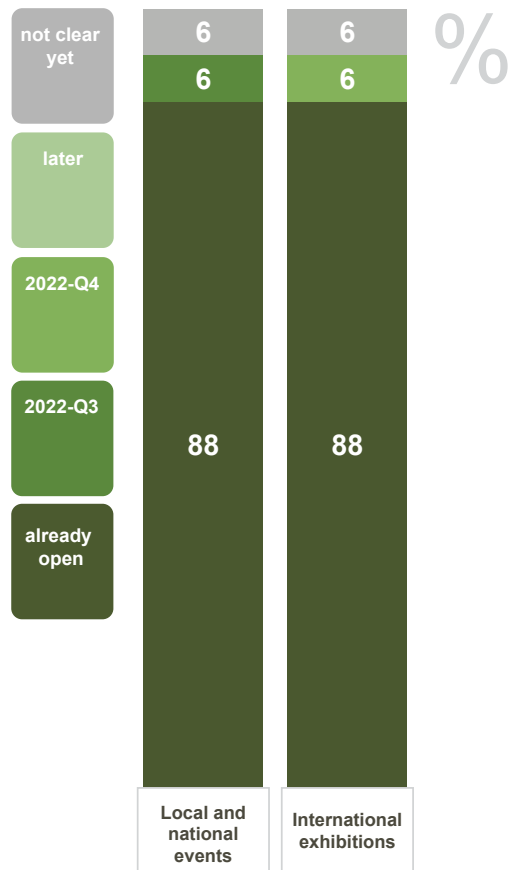


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

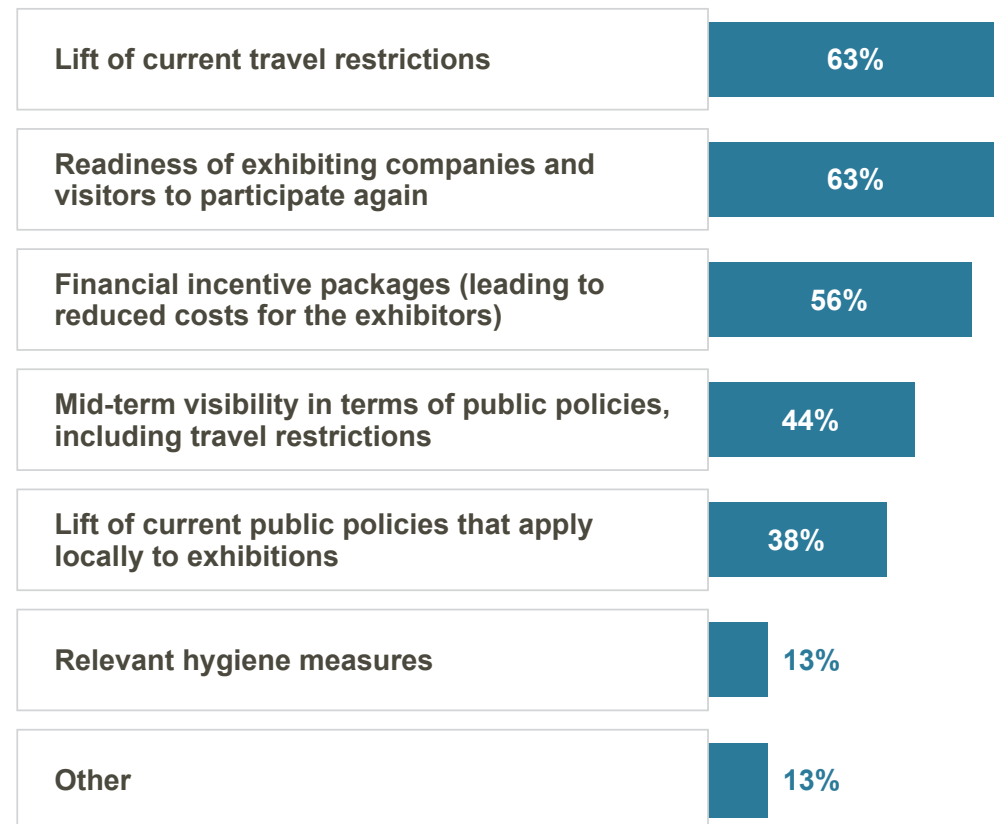


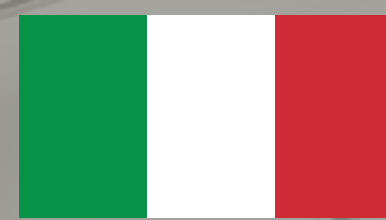


When do you believe exhibitions will open again in your city?

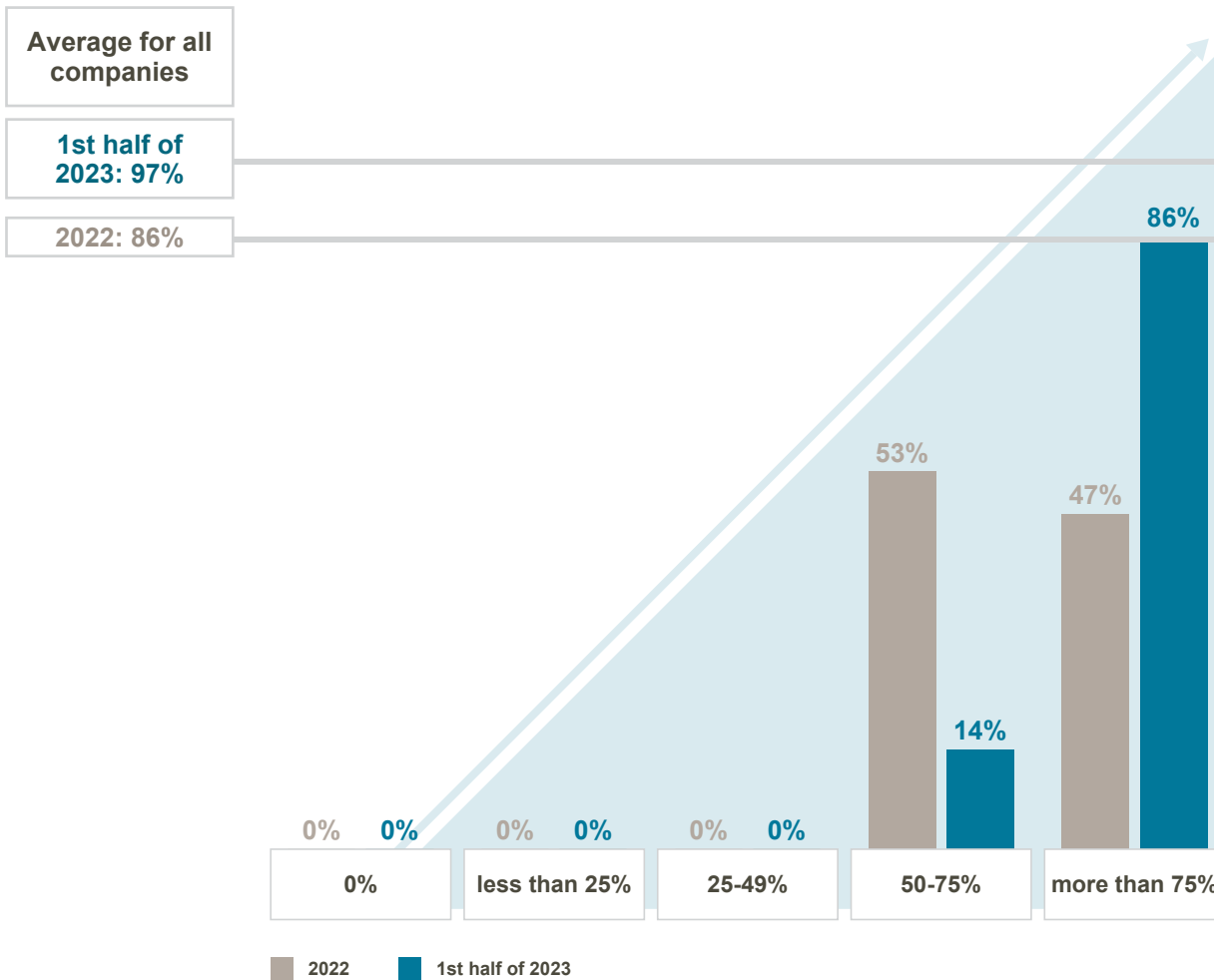


What do you believe would most help the “bounce back” of exhibitions?

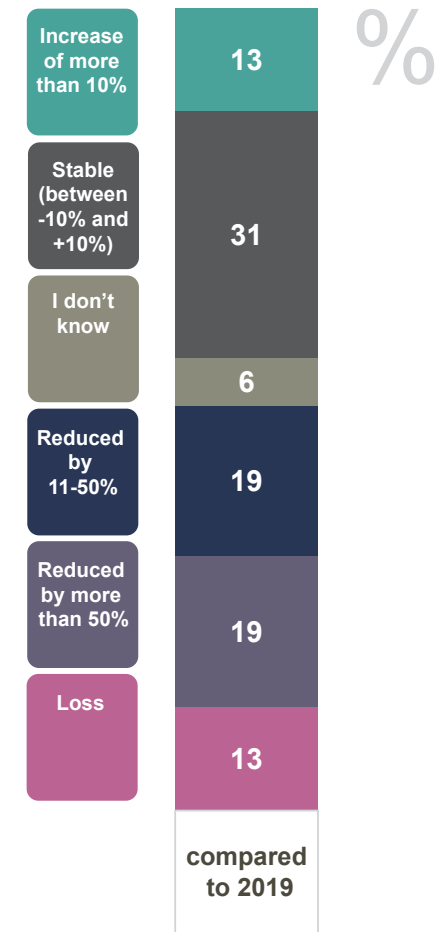




Revenue compared to 2019



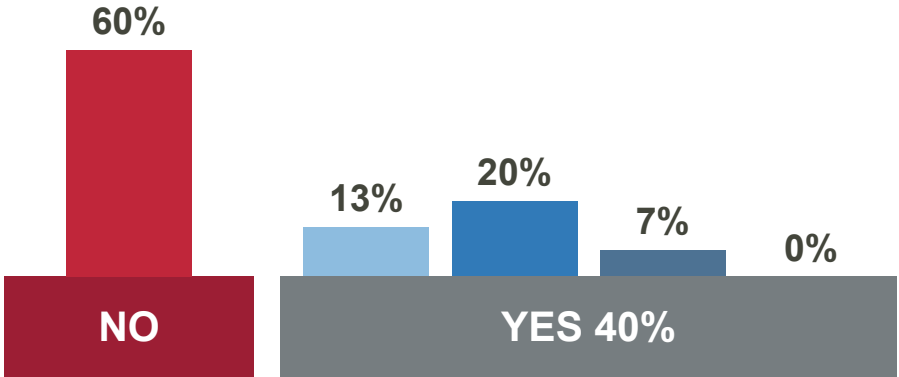
Operating Profits 2021

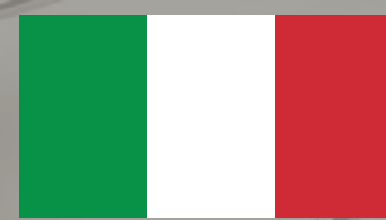




Did your company benefit from public financial support?

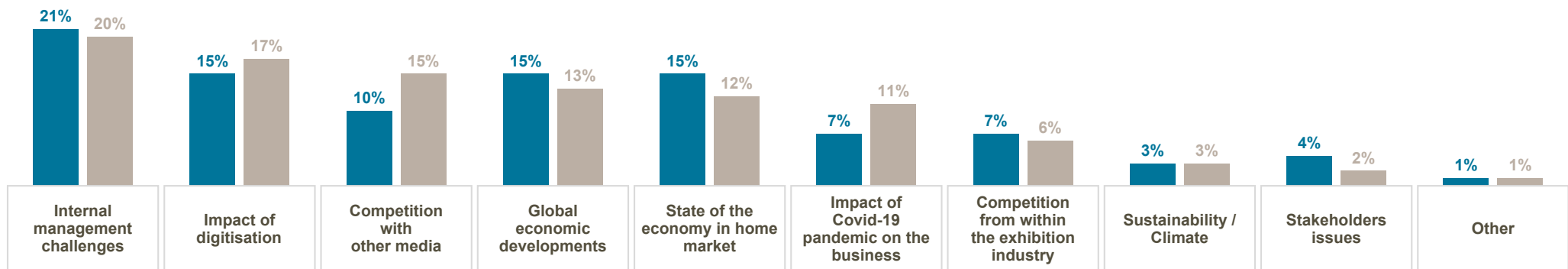
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





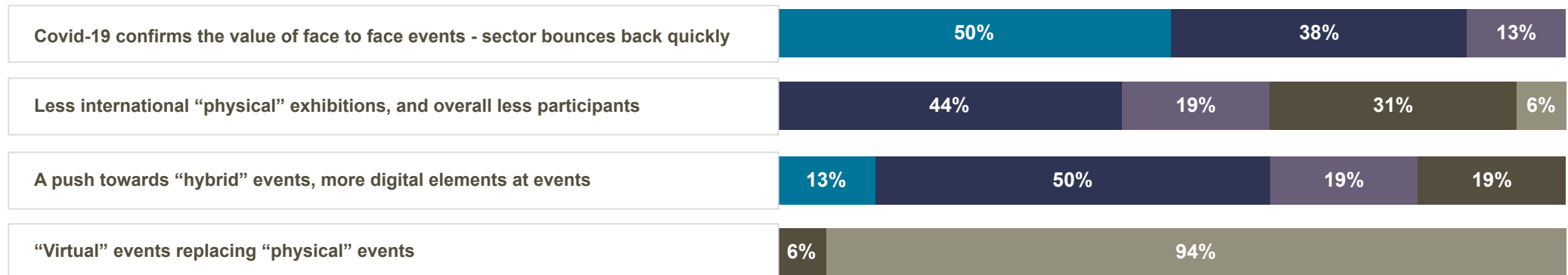
Most important business issues in the exhibition industry

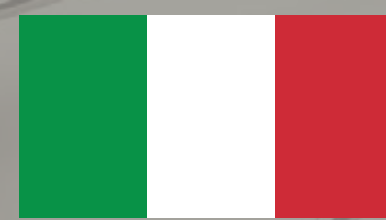
Italy Global



Format of exhibitions in the coming years

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





Digitisation: implementation in Italy and globally

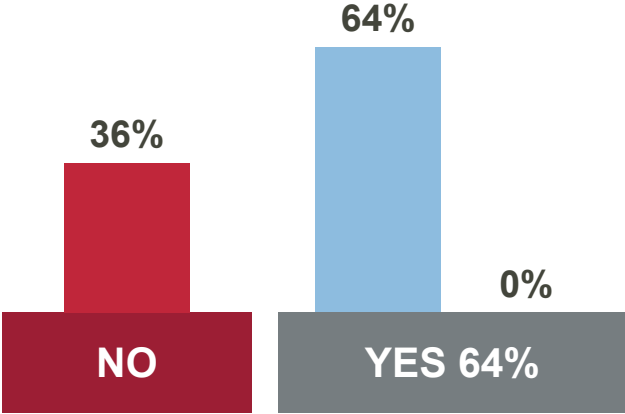
Italy Global





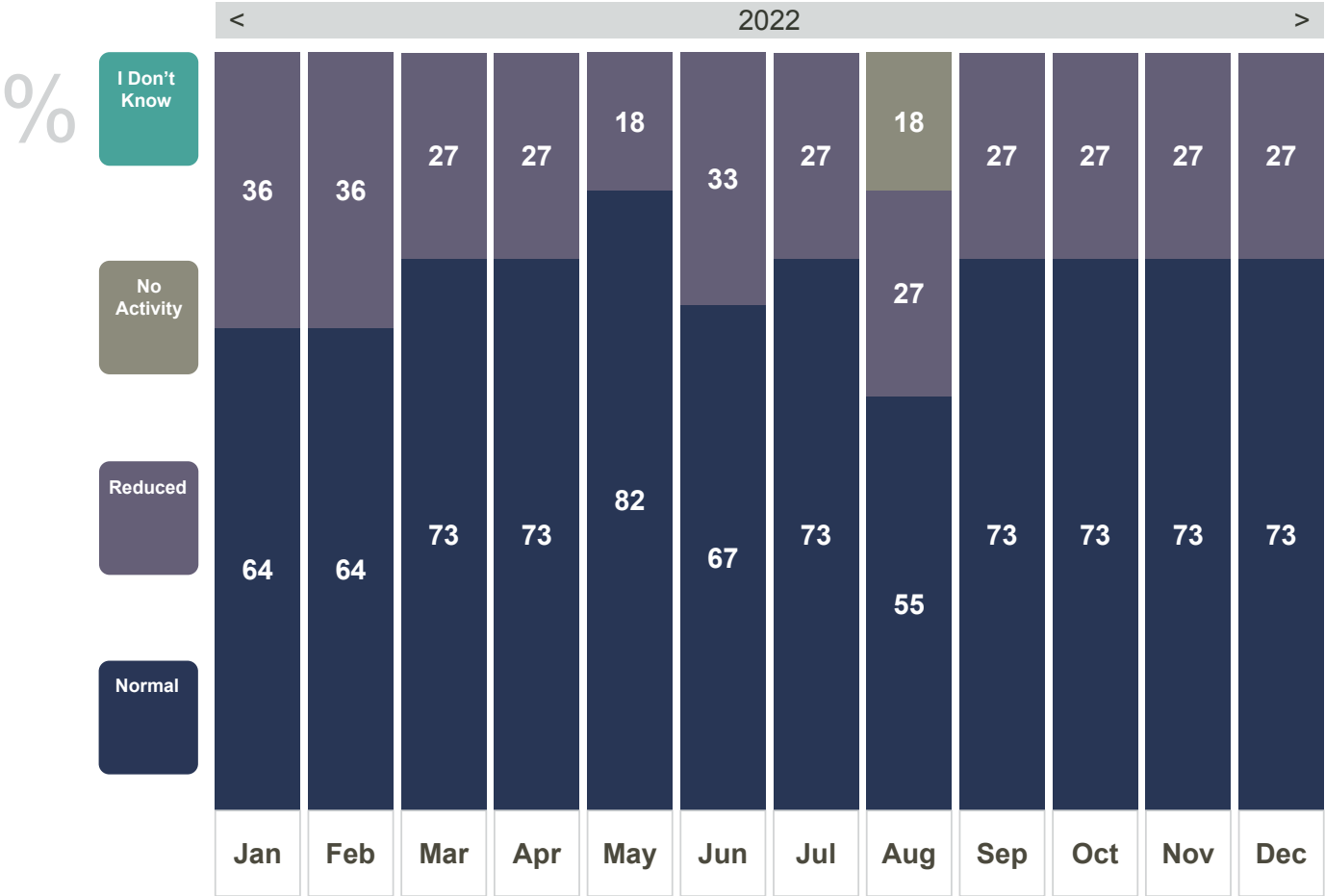
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



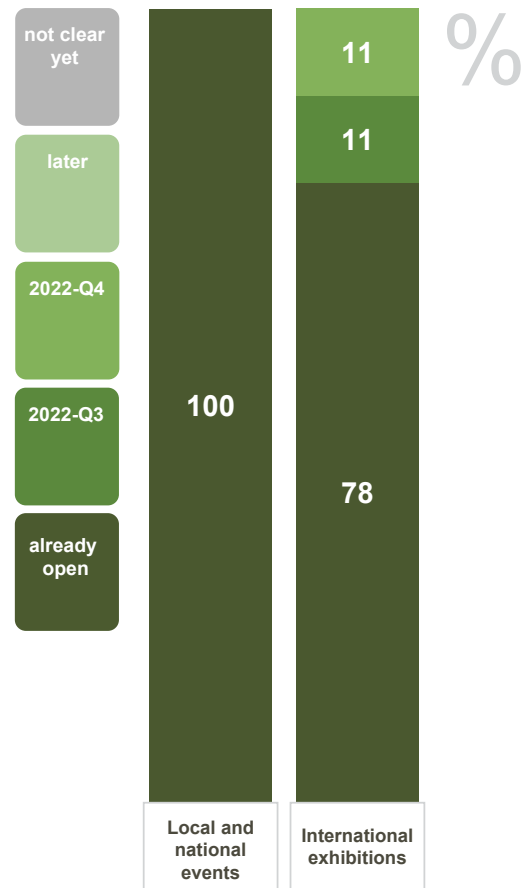


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

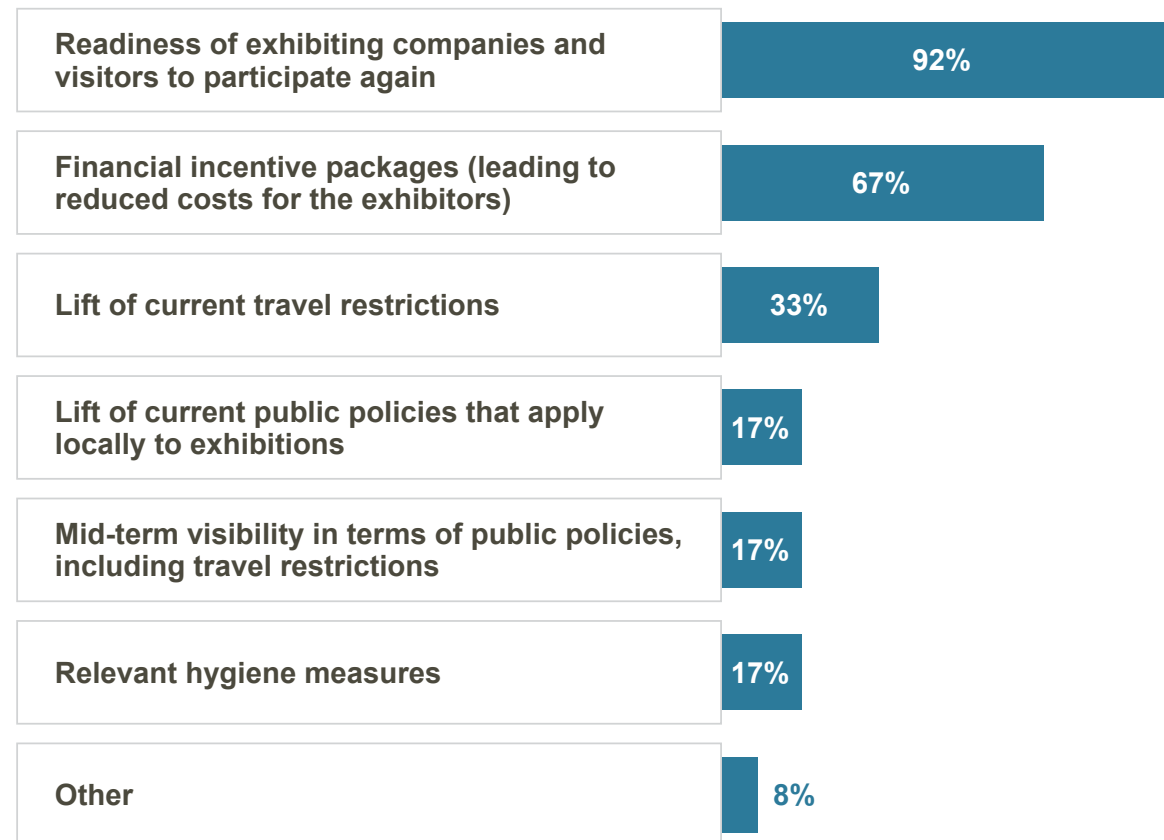




When do you believe exhibitions will open again in your city?



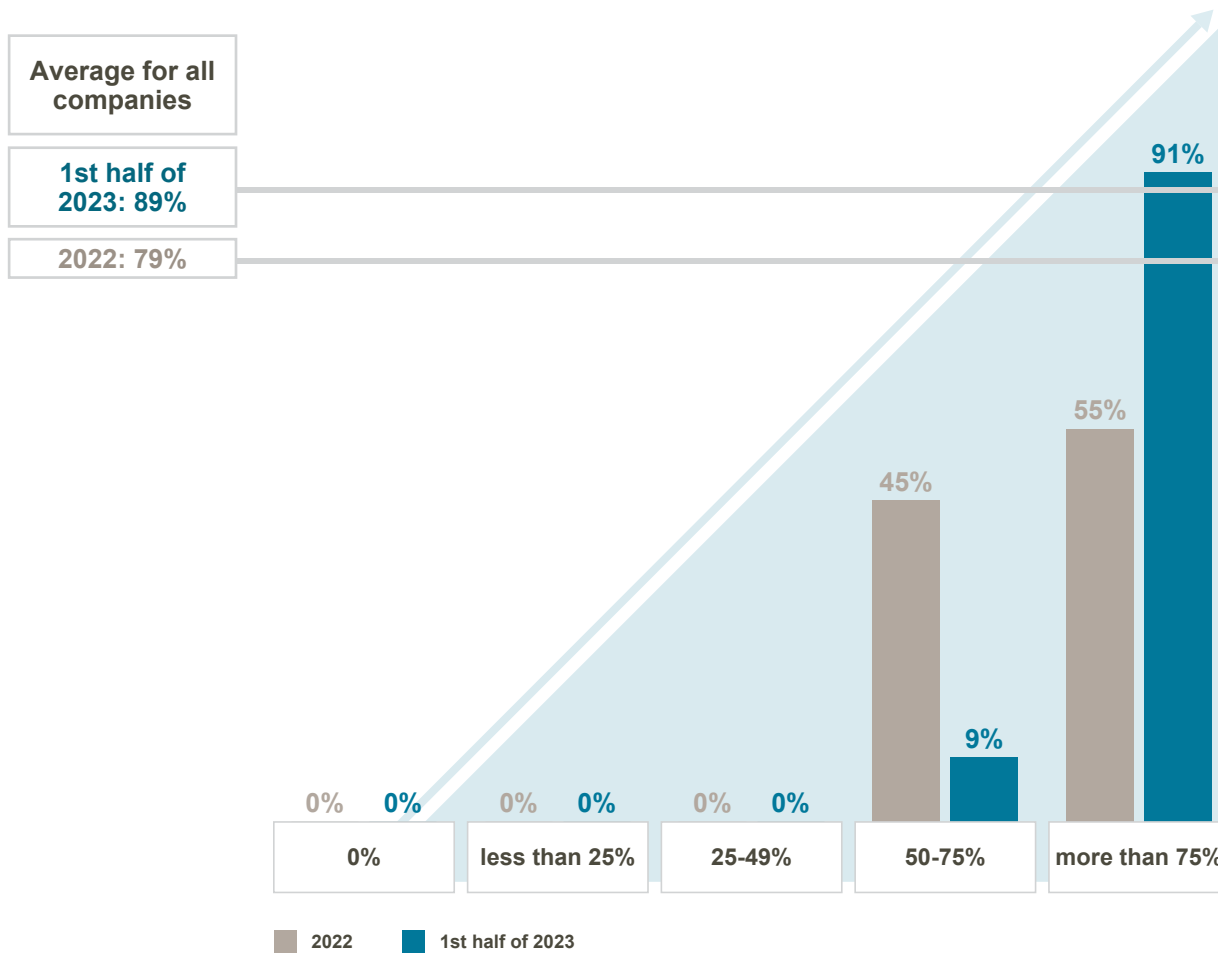
What do you believe would most help the “bounce back” of exhibitions?



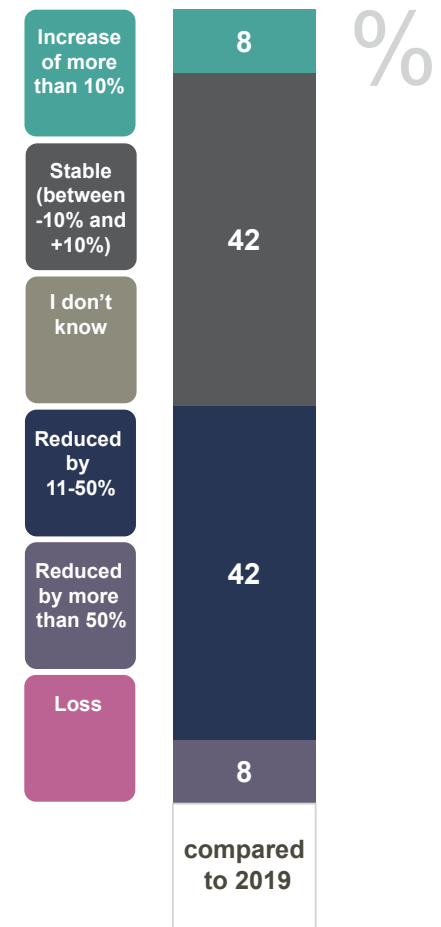
Detailed results for Spain



Revenue compared to 2019



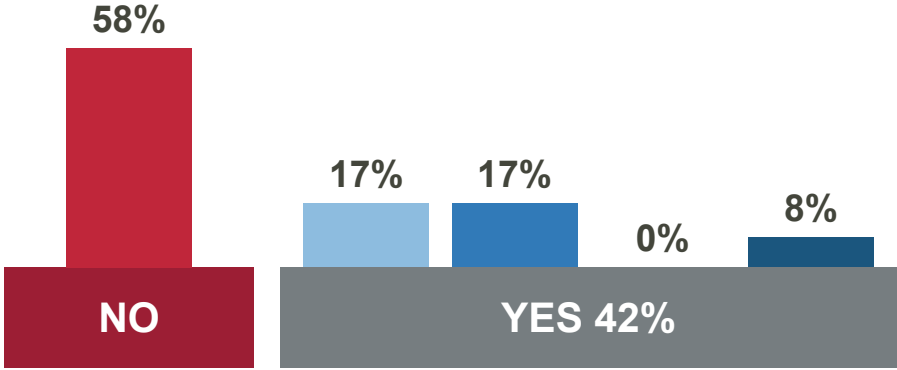
Operating Profits 2021





Did your company benefit from public financial support?

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



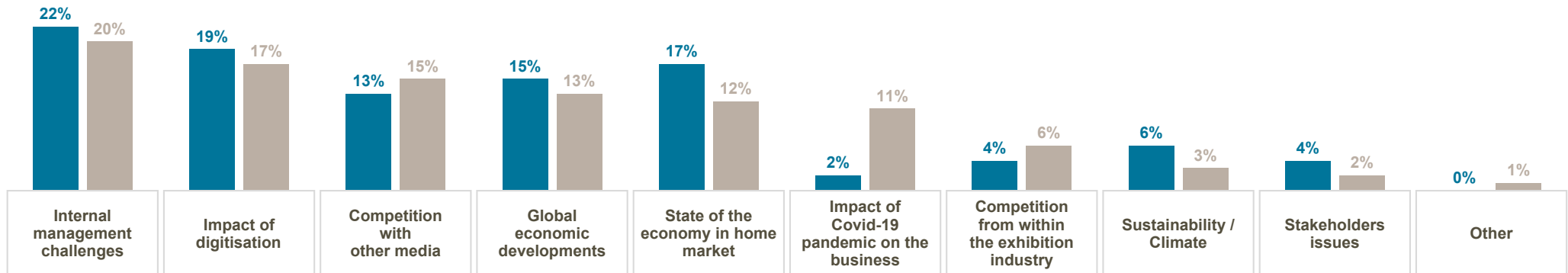
Detailed results for Spain



Most important business issues in the exhibition industry

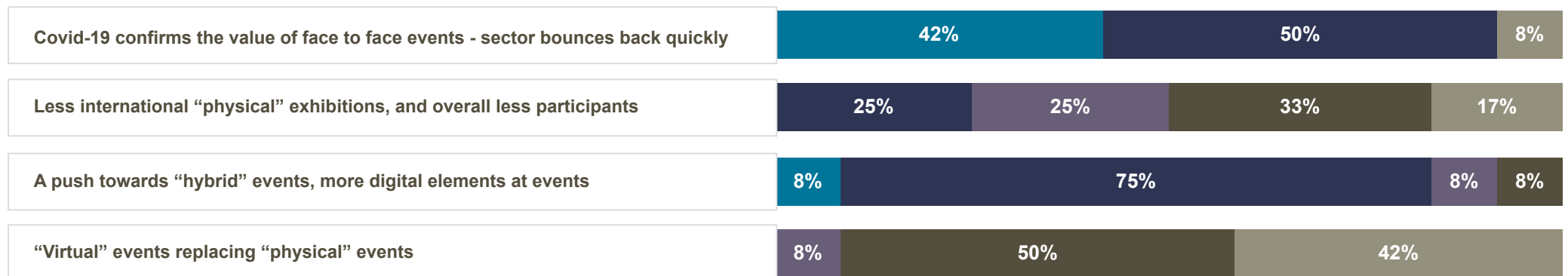
Spain

Global



Format of exhibitions in the coming years

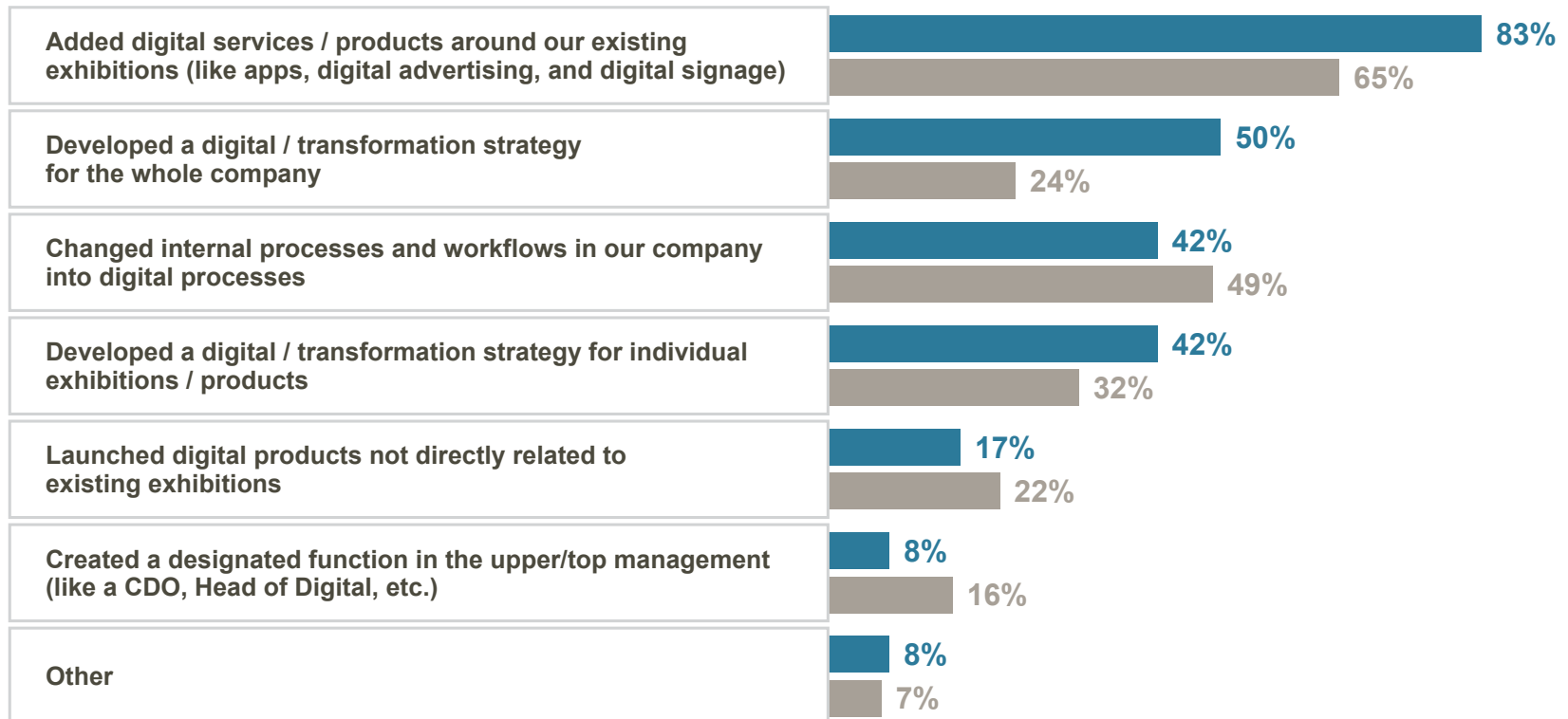
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in Spain and globally

Spain
Global



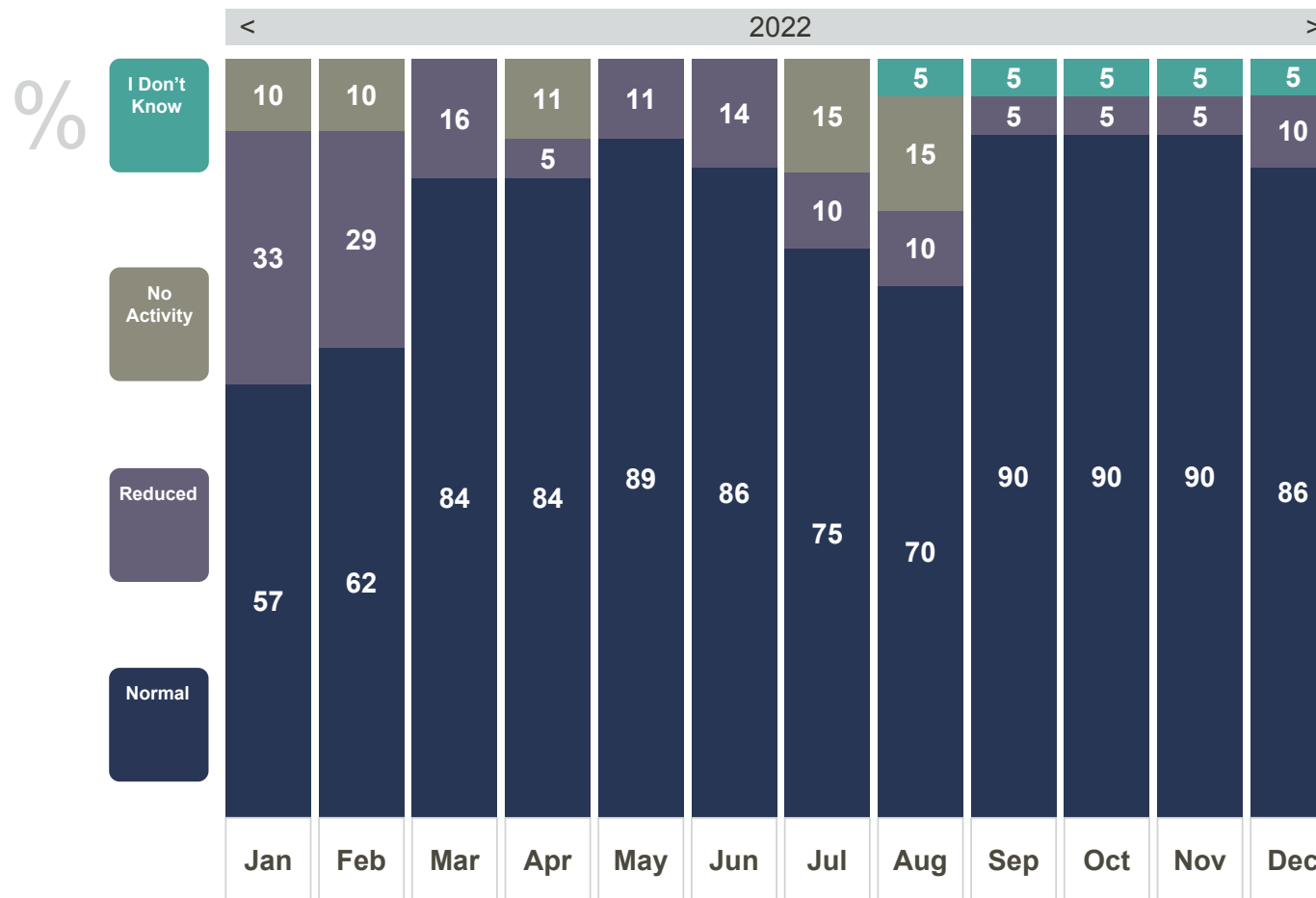


HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic



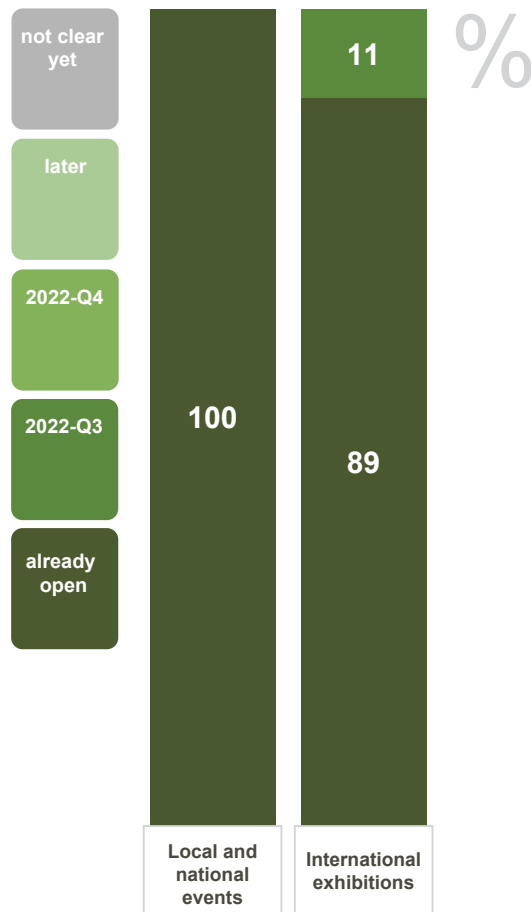


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

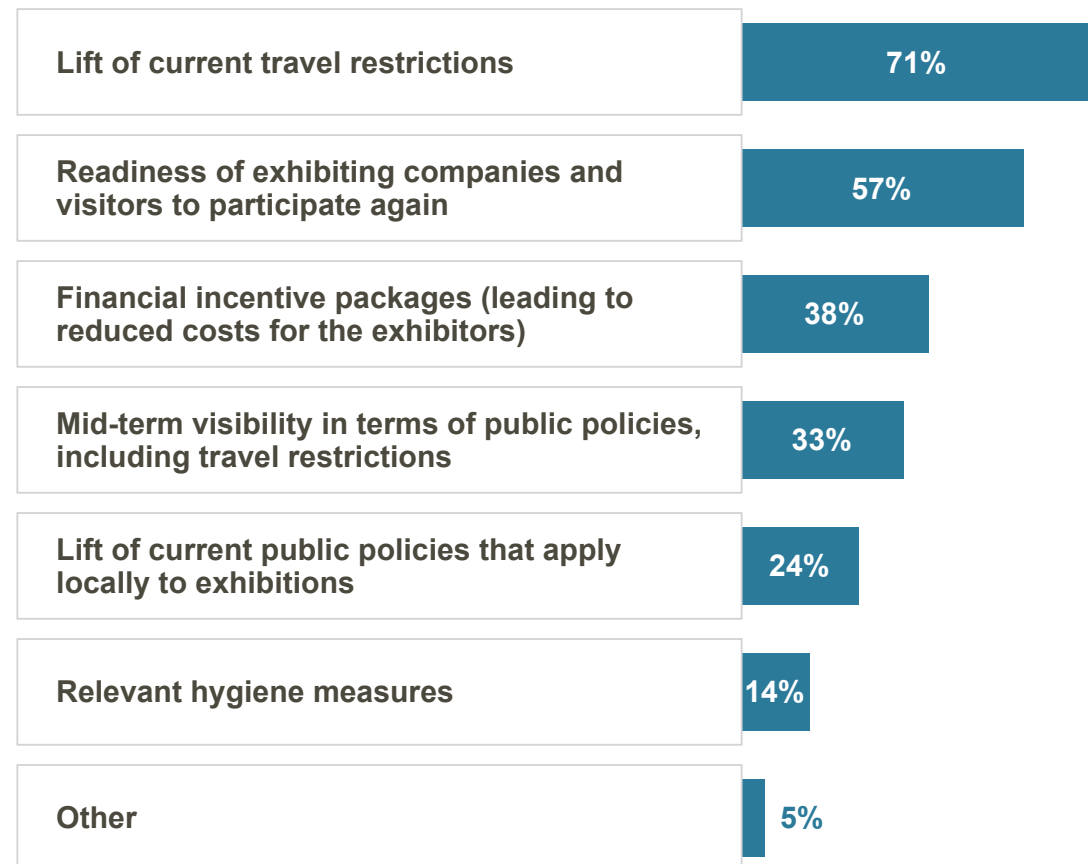




When do you believe exhibitions will open again in your city?

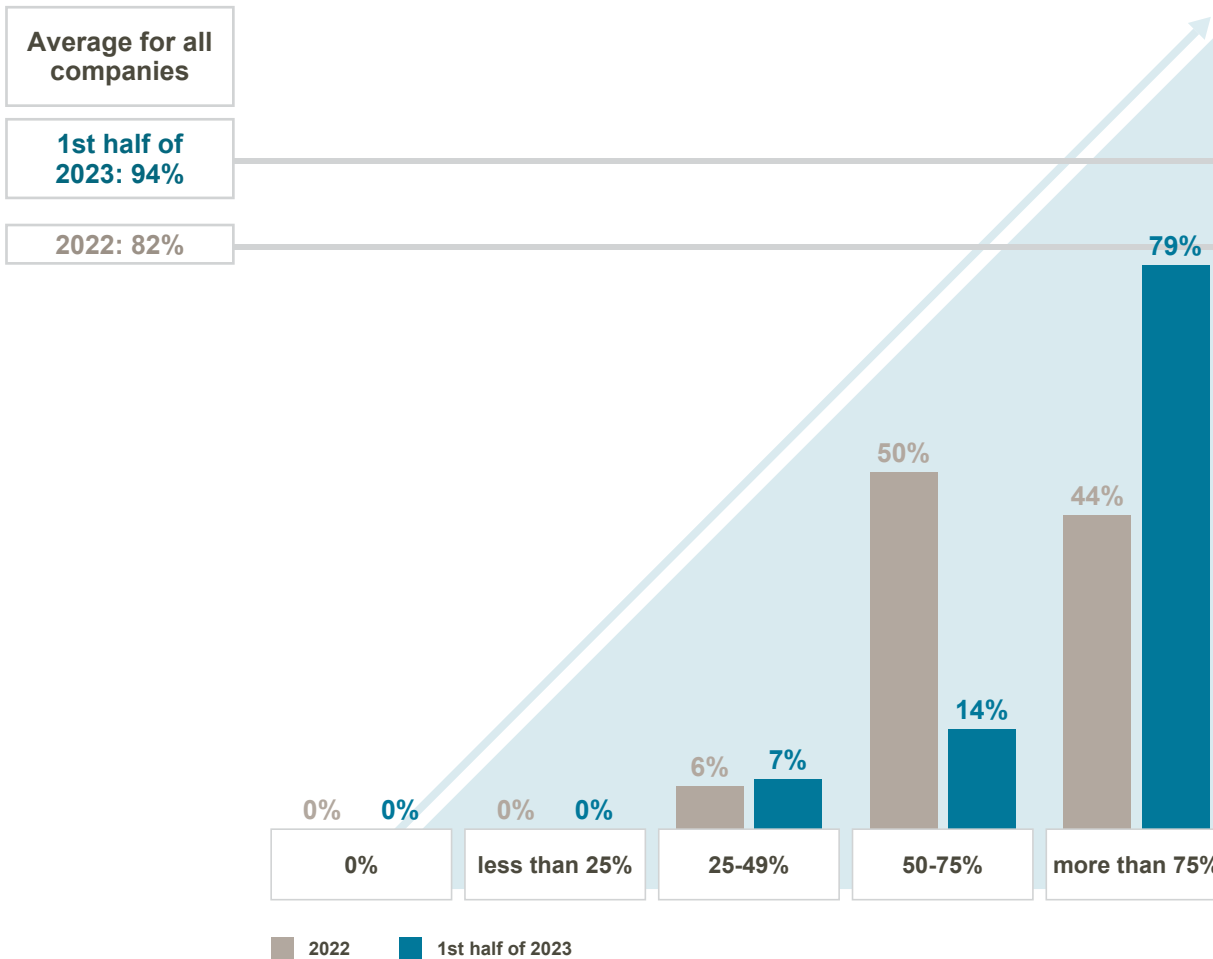


What do you believe would most help the “bounce back” of exhibitions?

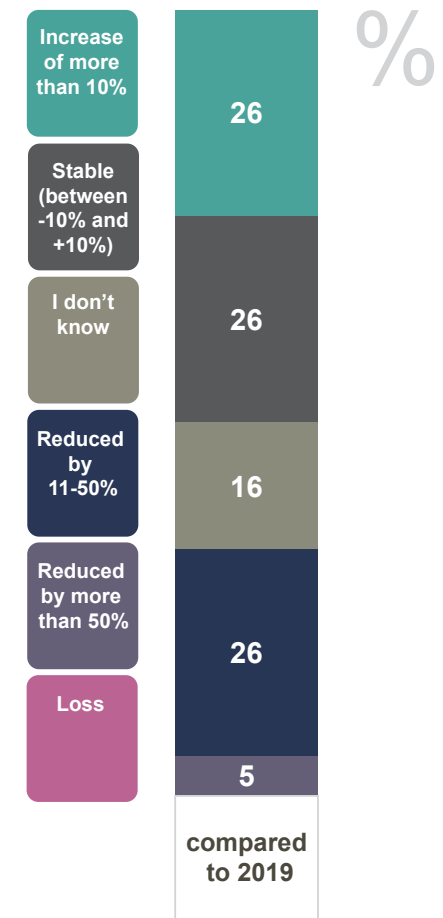




Revenue compared to 2019



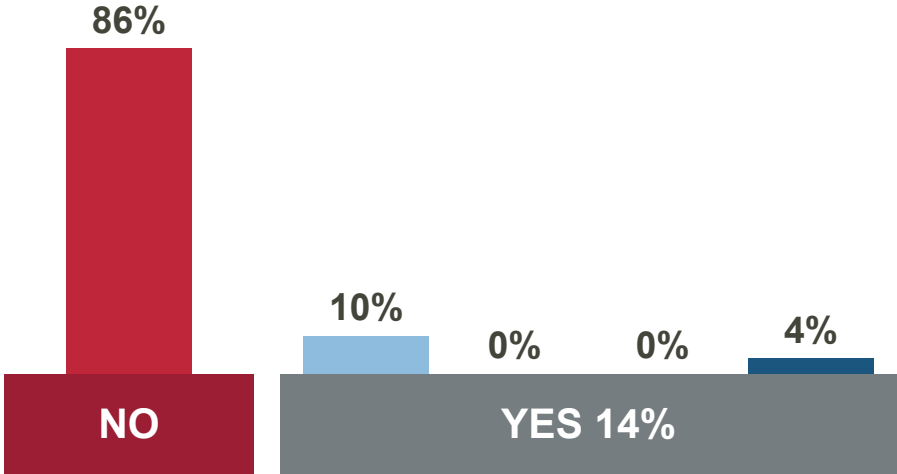
Operating Profits 2021





Did your company benefit from public financial support?

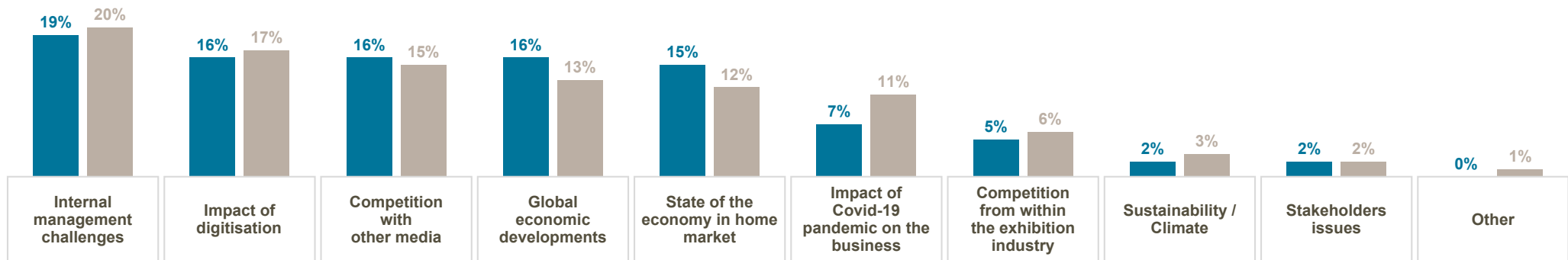
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





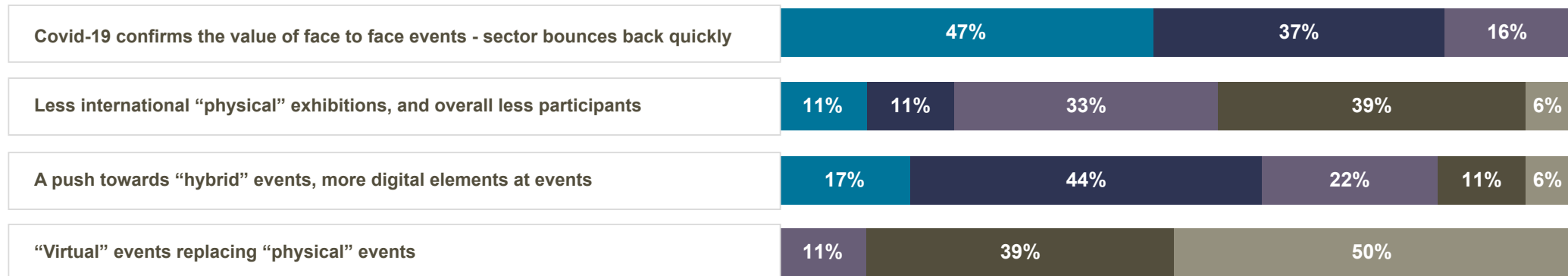
Most important business issues in the exhibition industry

Turkey Global



Format of exhibitions in the coming years

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





Digitisation: implementation in Turkey and globally

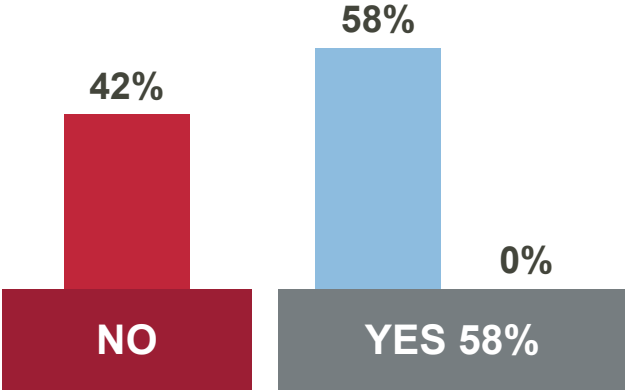
Turkey Global





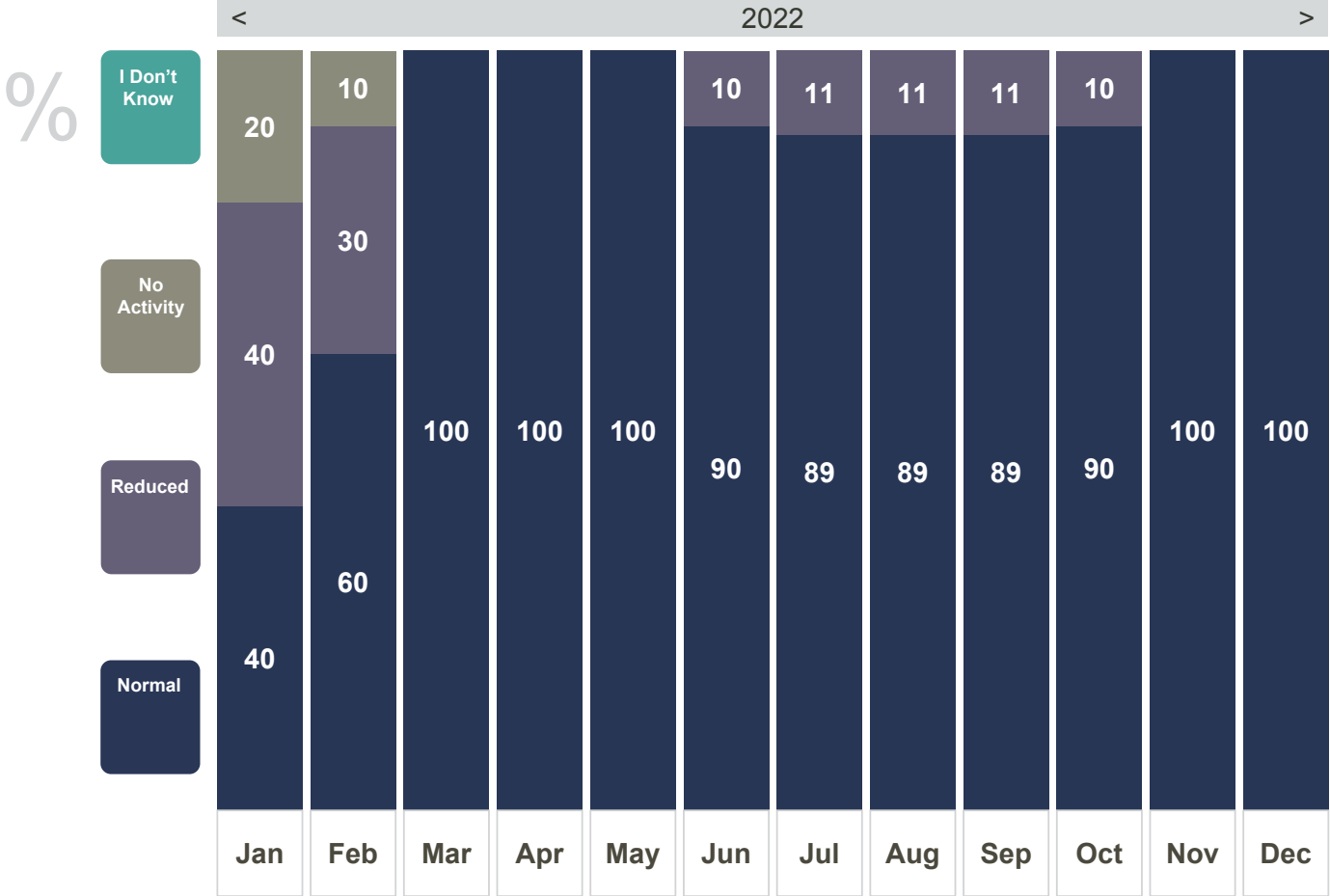
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

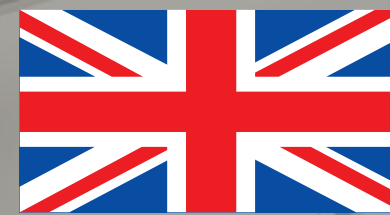
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



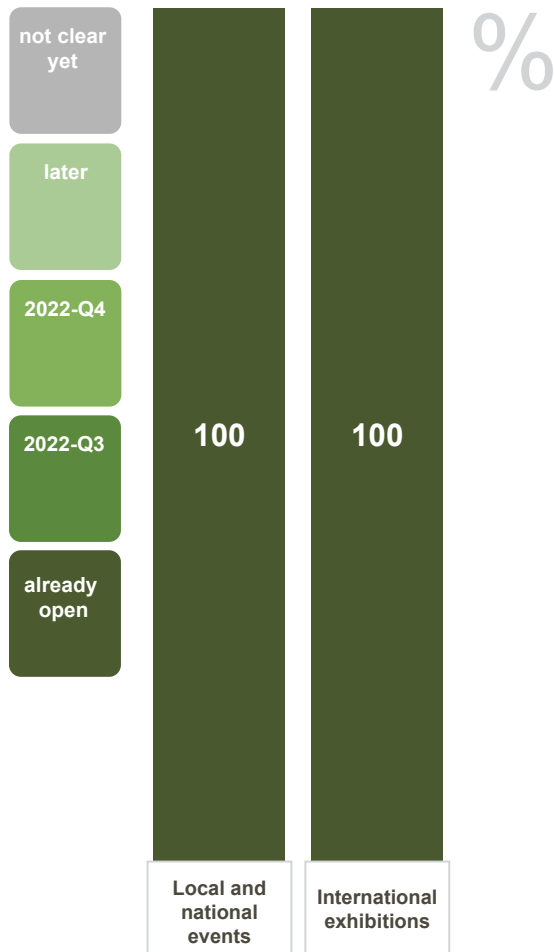


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

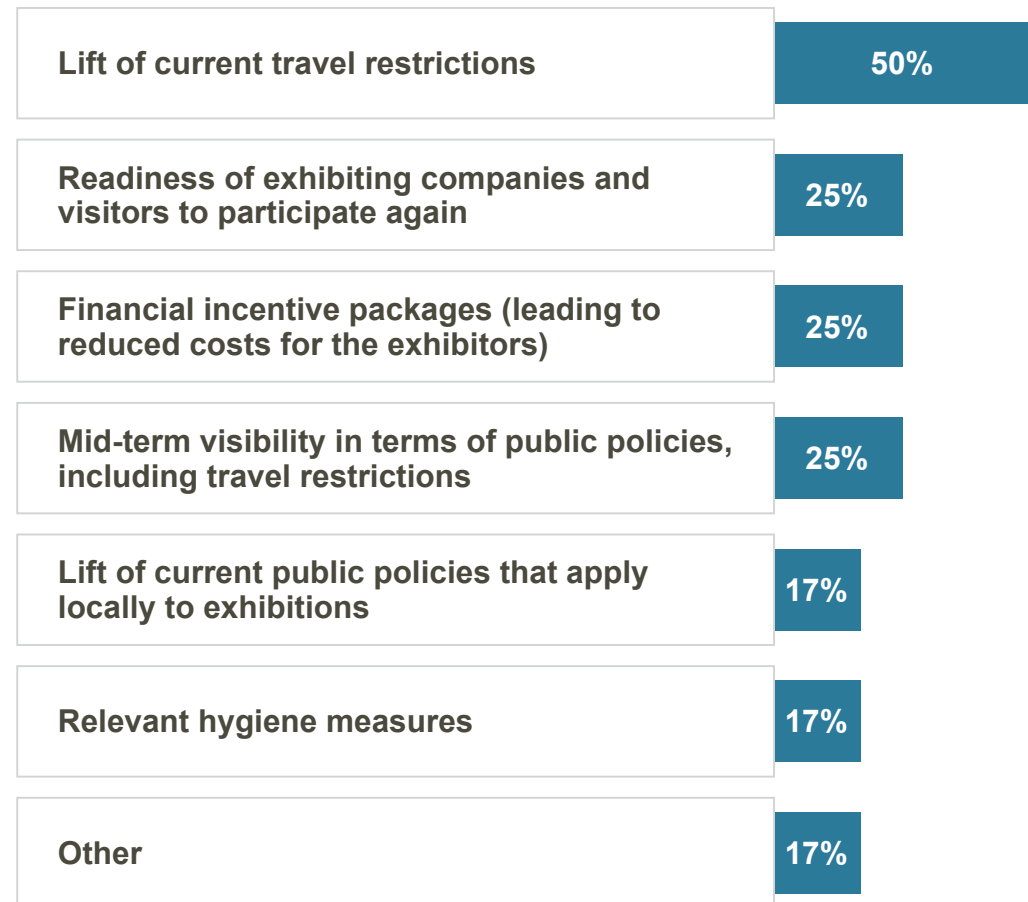




When do you believe exhibitions will open again in your city?

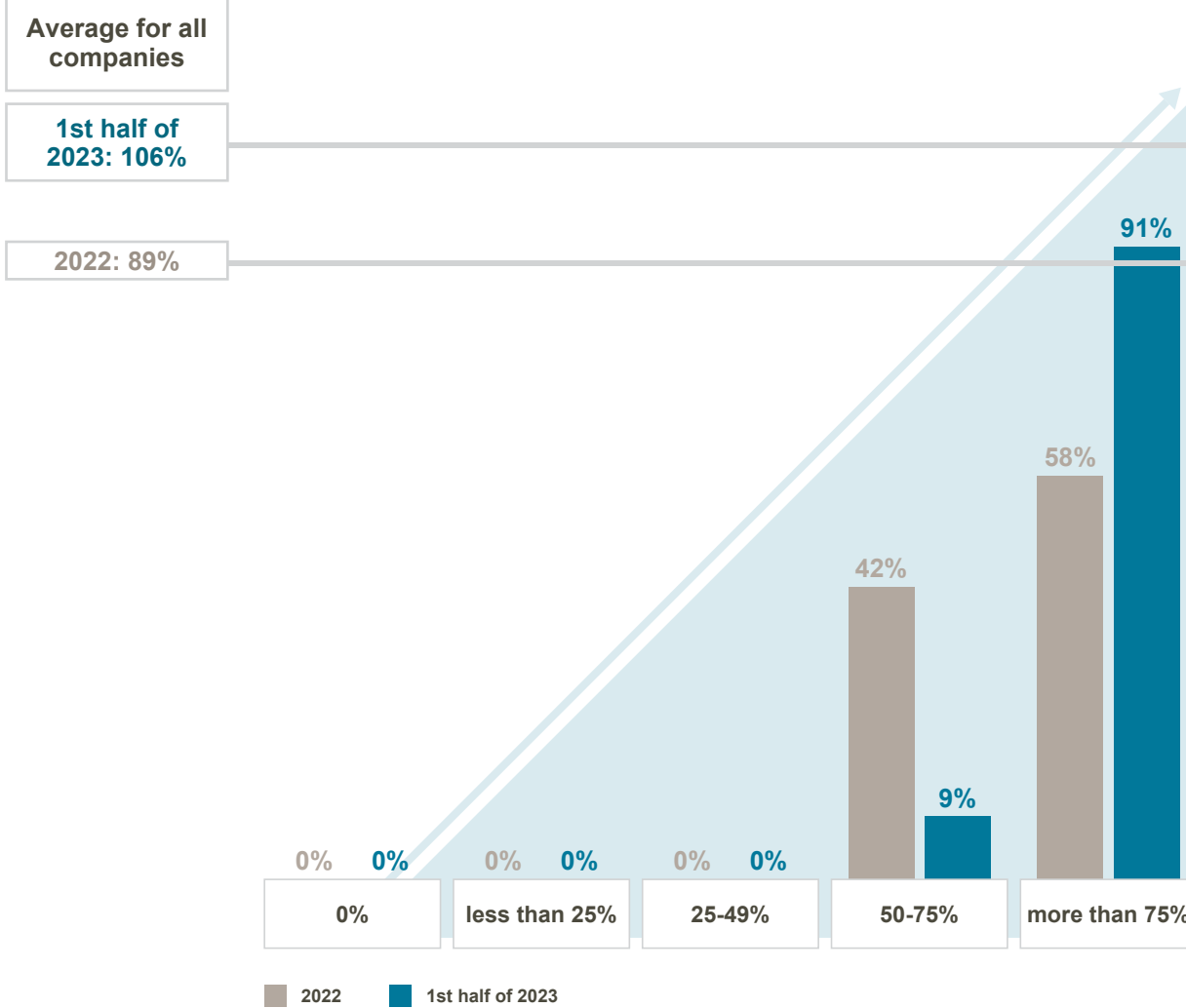


What do you believe would most help the “bounce back” of exhibitions?

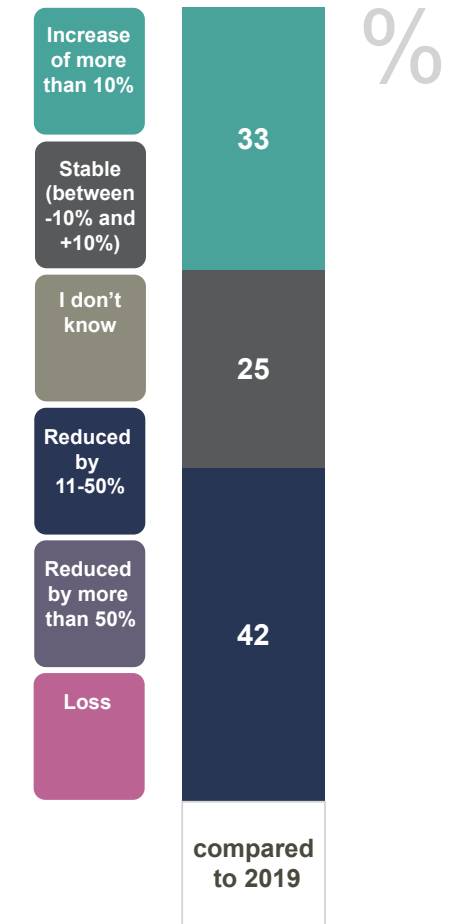




Revenue compared to 2019

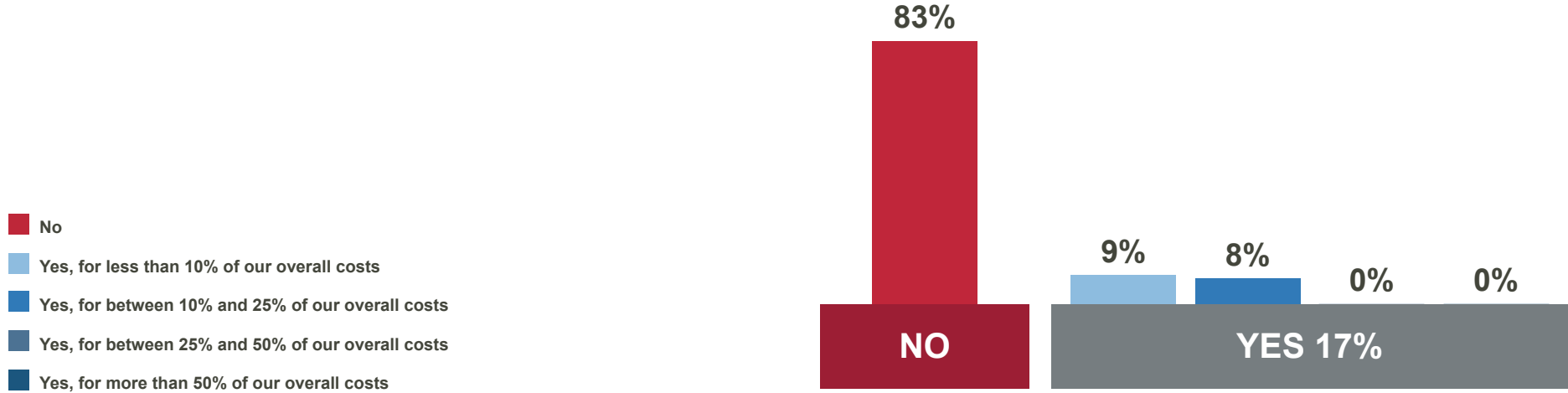


Operating Profits 2021





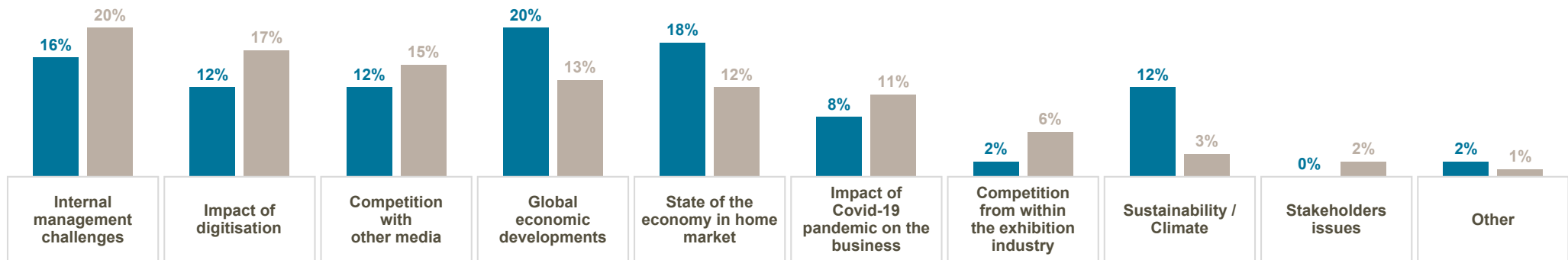
Did your company benefit from public financial support?





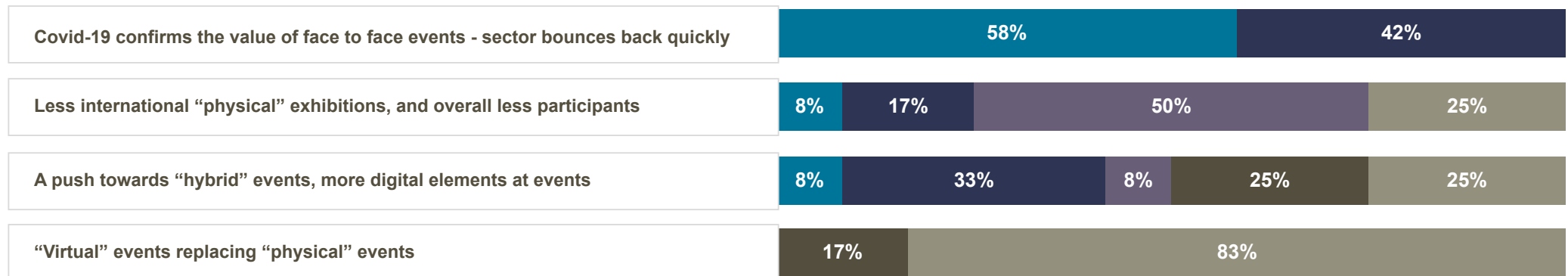
Most important business issues in the exhibition industry

UK Global



Format of exhibitions in the coming years

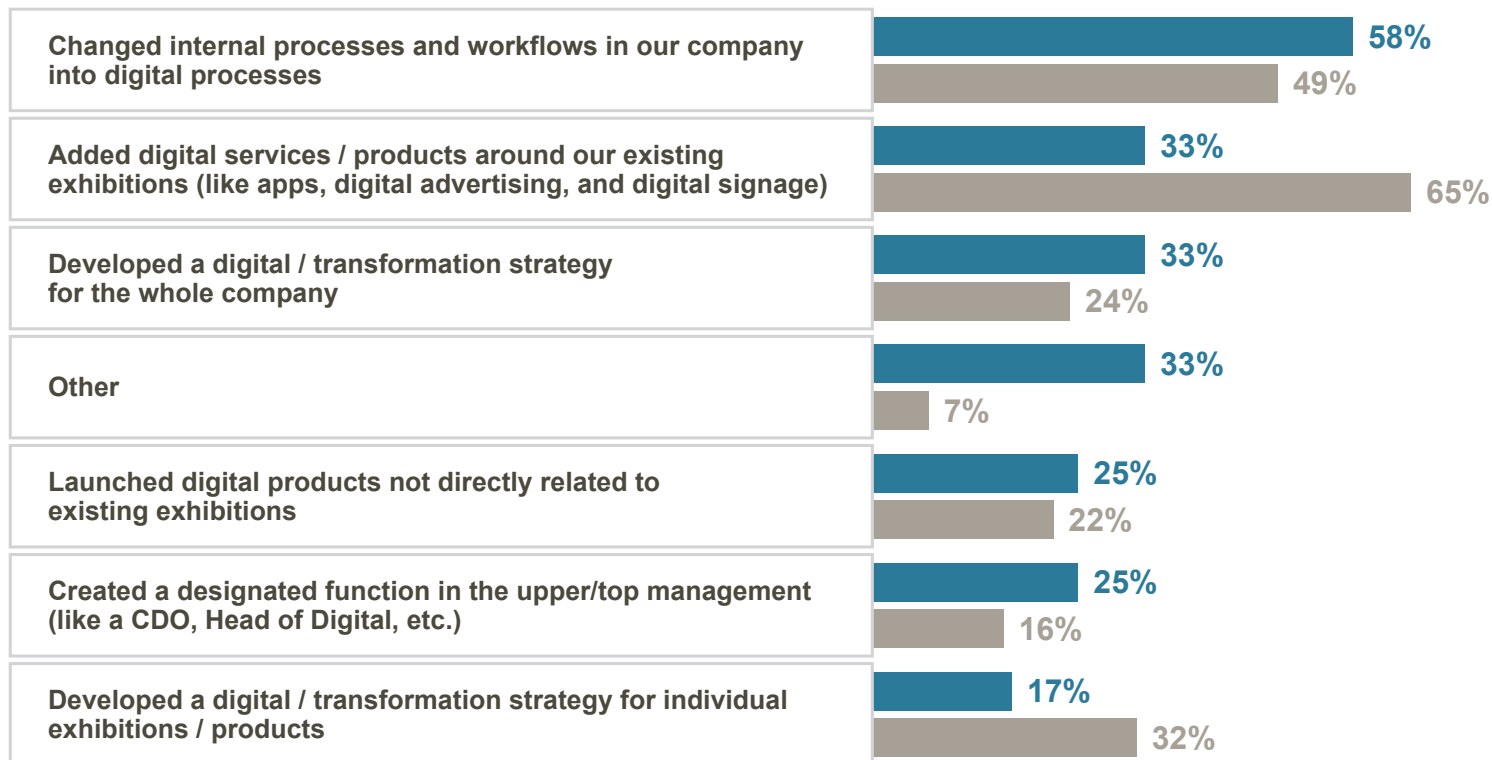
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in UK and globally

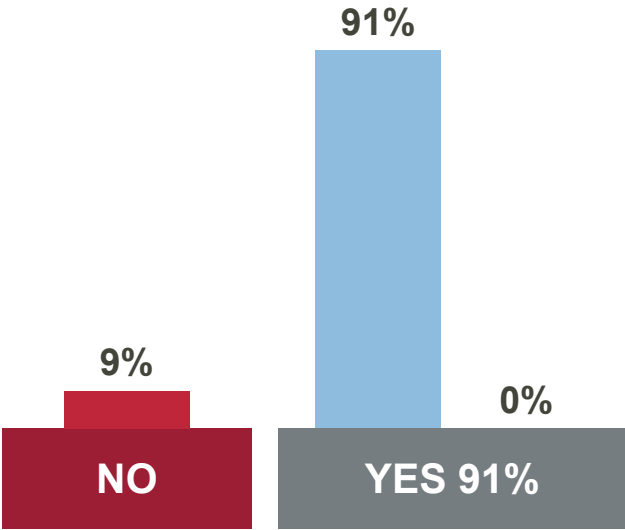
UK
Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



Middle East & Africa



Operations - Reopening Exhibitions Middle East & Africa

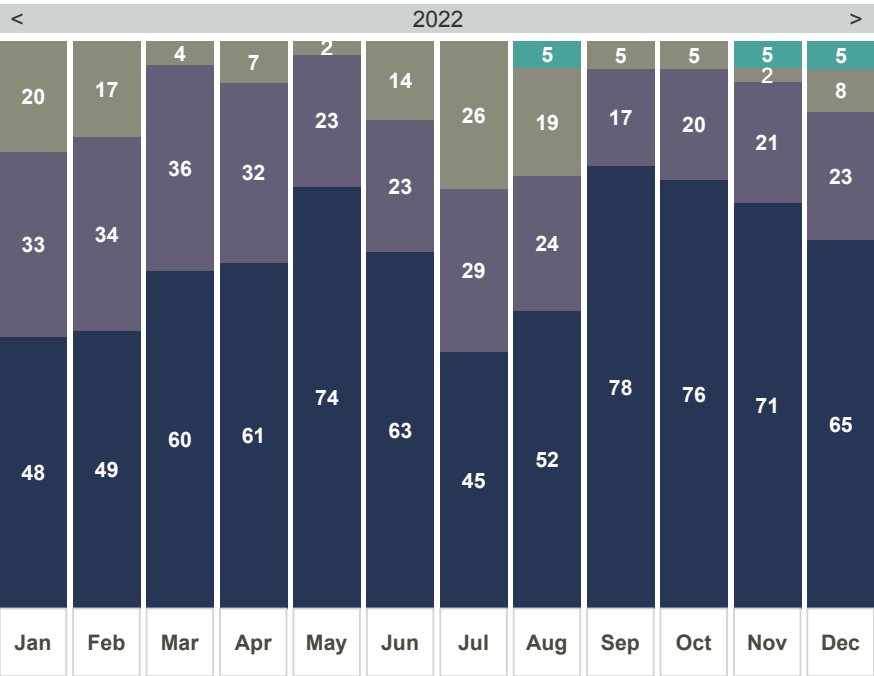


Situation of the industry operations for the 1st half of 2022, and current predictions for the 2nd half of 2022

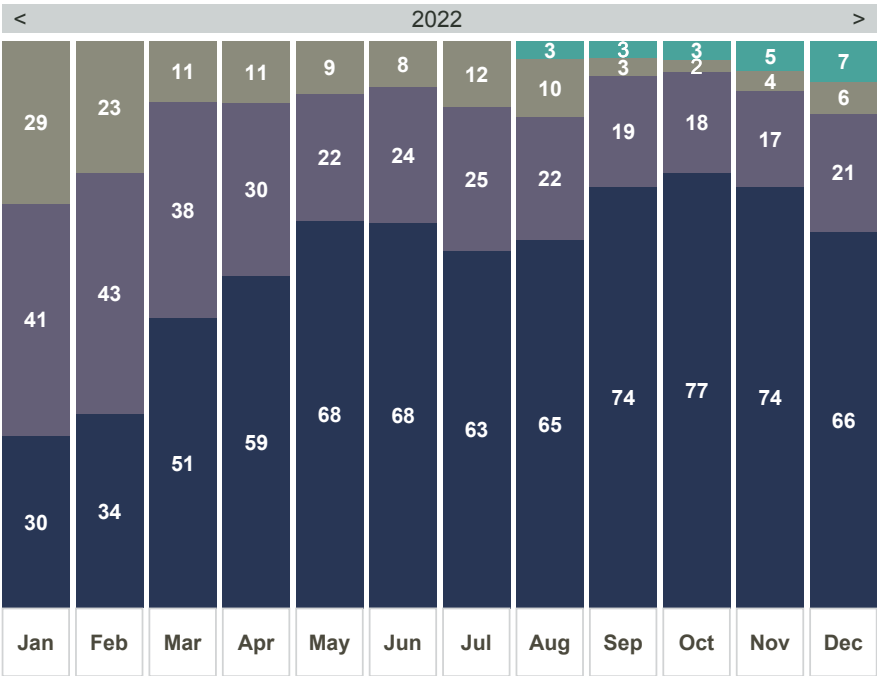


%

Middle East & Africa



World



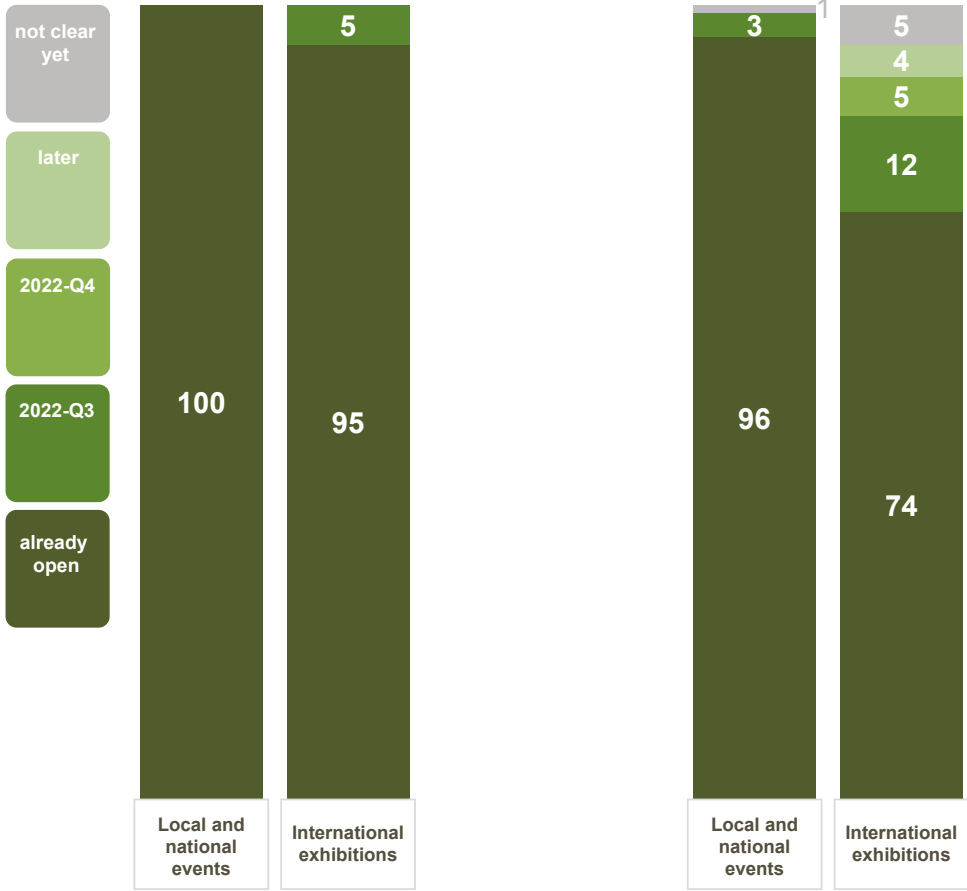
Operations - Reopening Exhibitions Middle East & Africa



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

Middle East & Africa

World

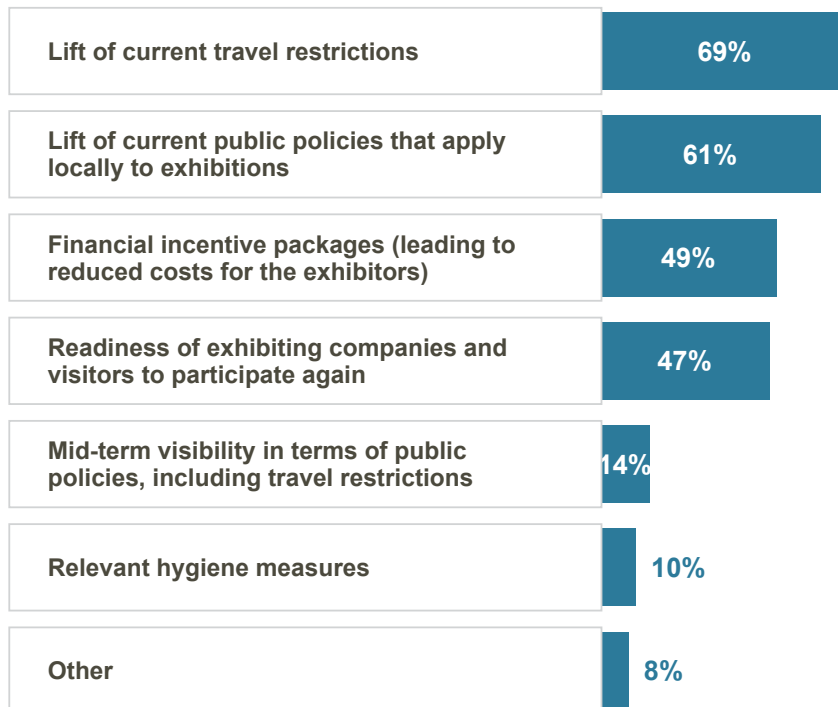


%

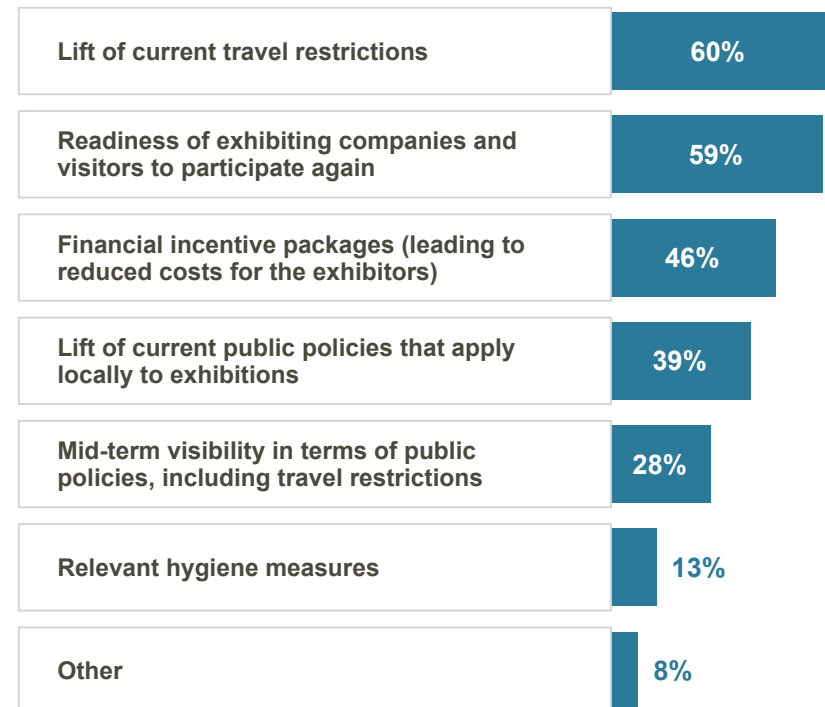


What do you believe would most help the “bounce back” of exhibitions?

Middle East & Africa



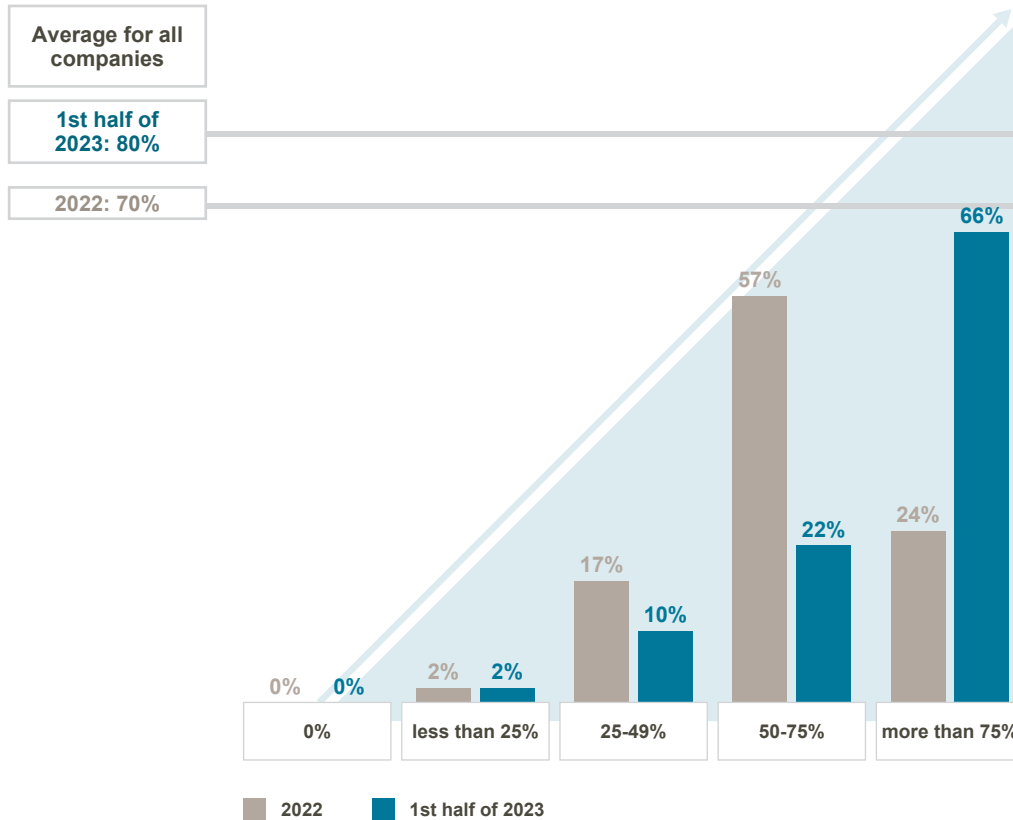
World



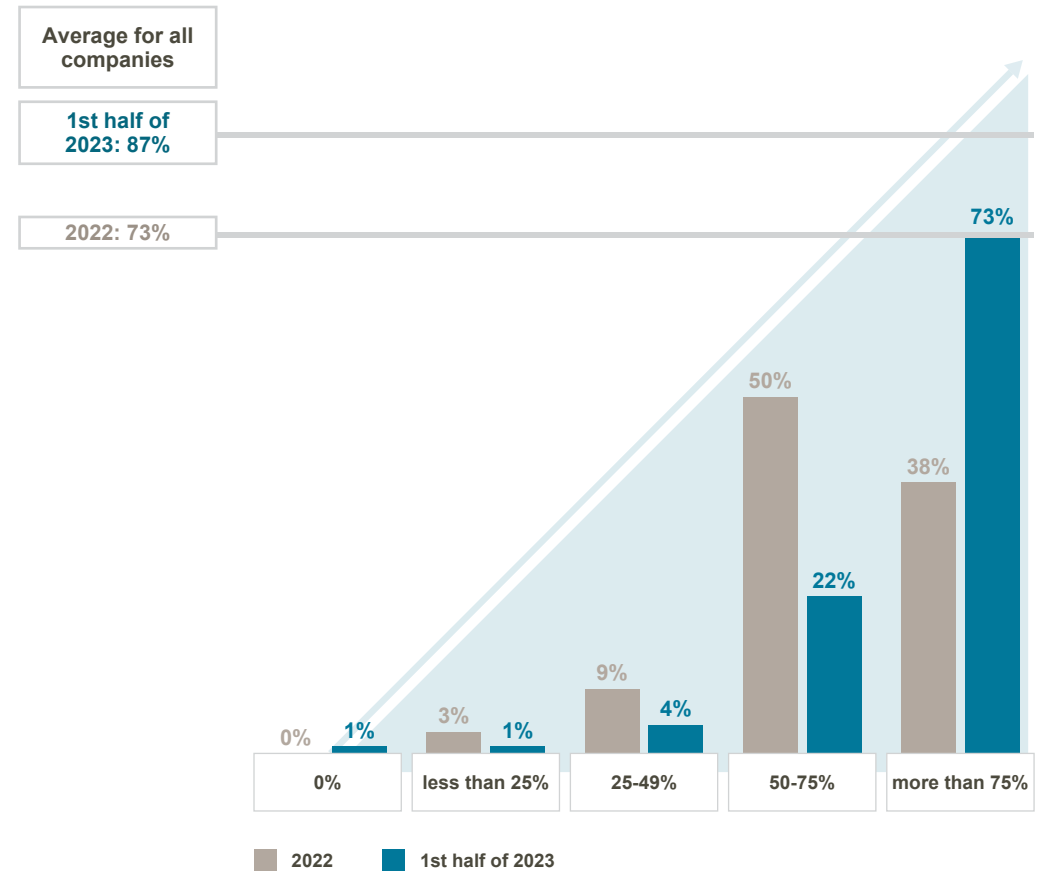


Revenue compared to 2019

Middle East & Africa



World



Operating profit 2019 Middle East & Africa



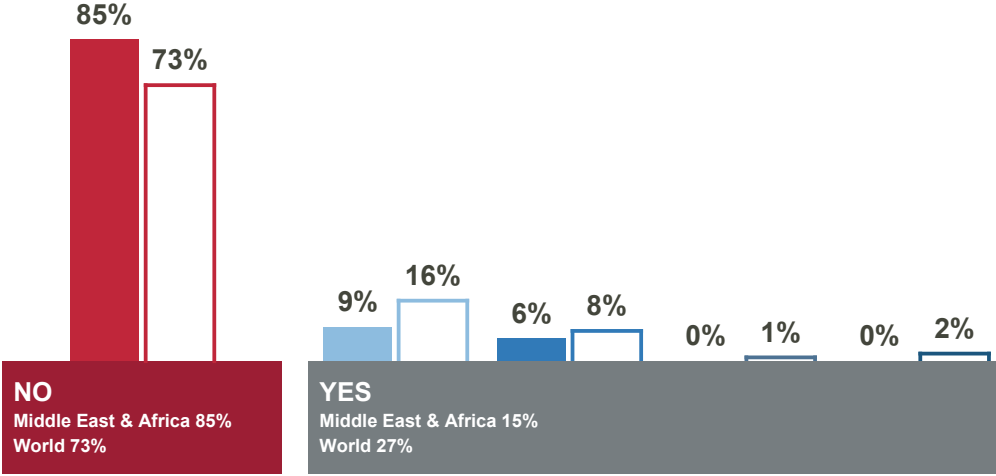
%



Did your company benefit from public financial support?

Middle East & Africa World

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

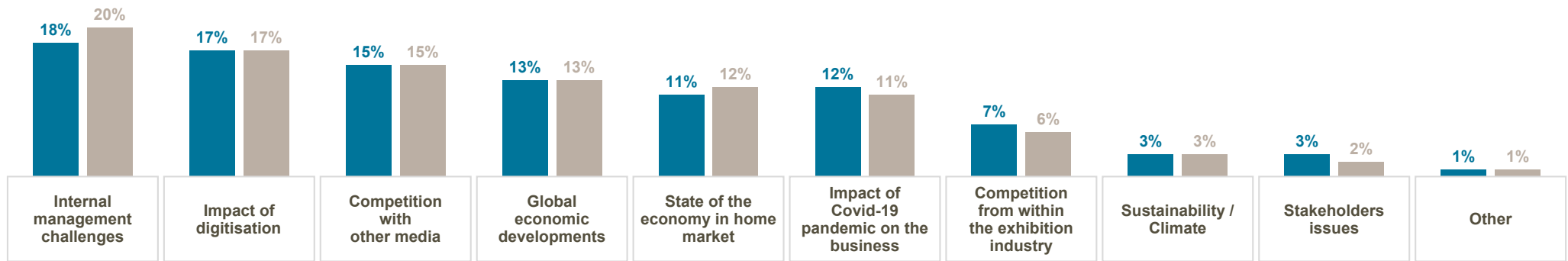


Most Important Business Issues - Format of Exhibitions - Middle East & Africa



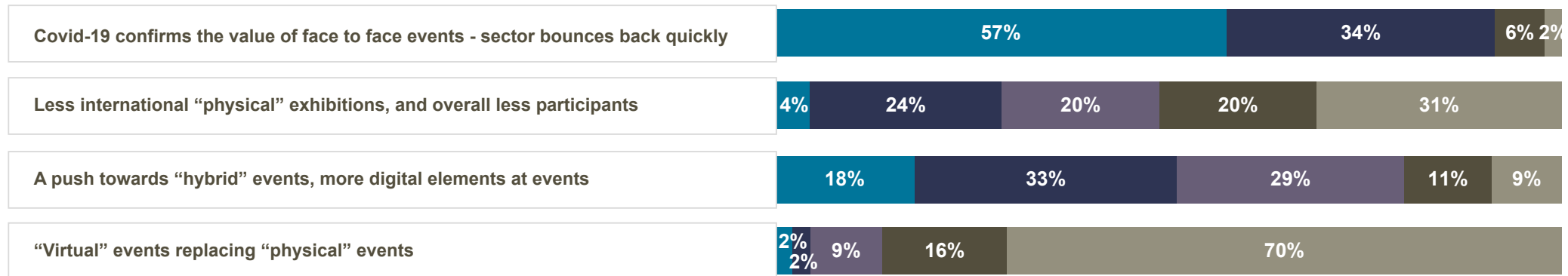
Most important business issues in the exhibition industry

Middle East & Africa Global



Format of exhibitions in the coming years

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



Digitisation: implementation in Middle East & Africa and globally

Middle East & Africa

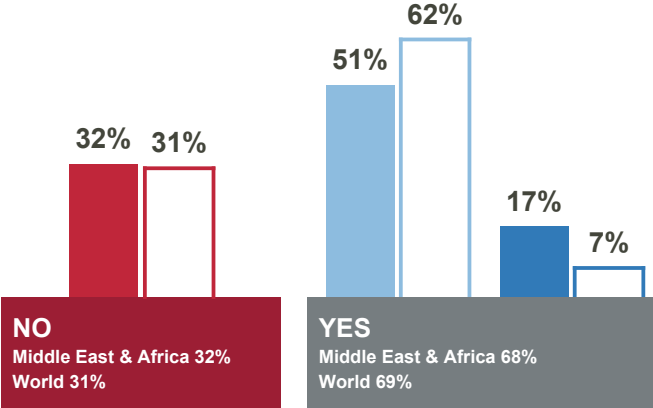
Global

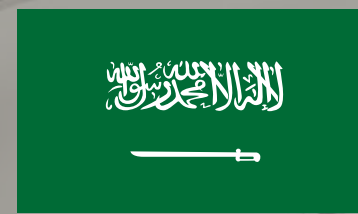


HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

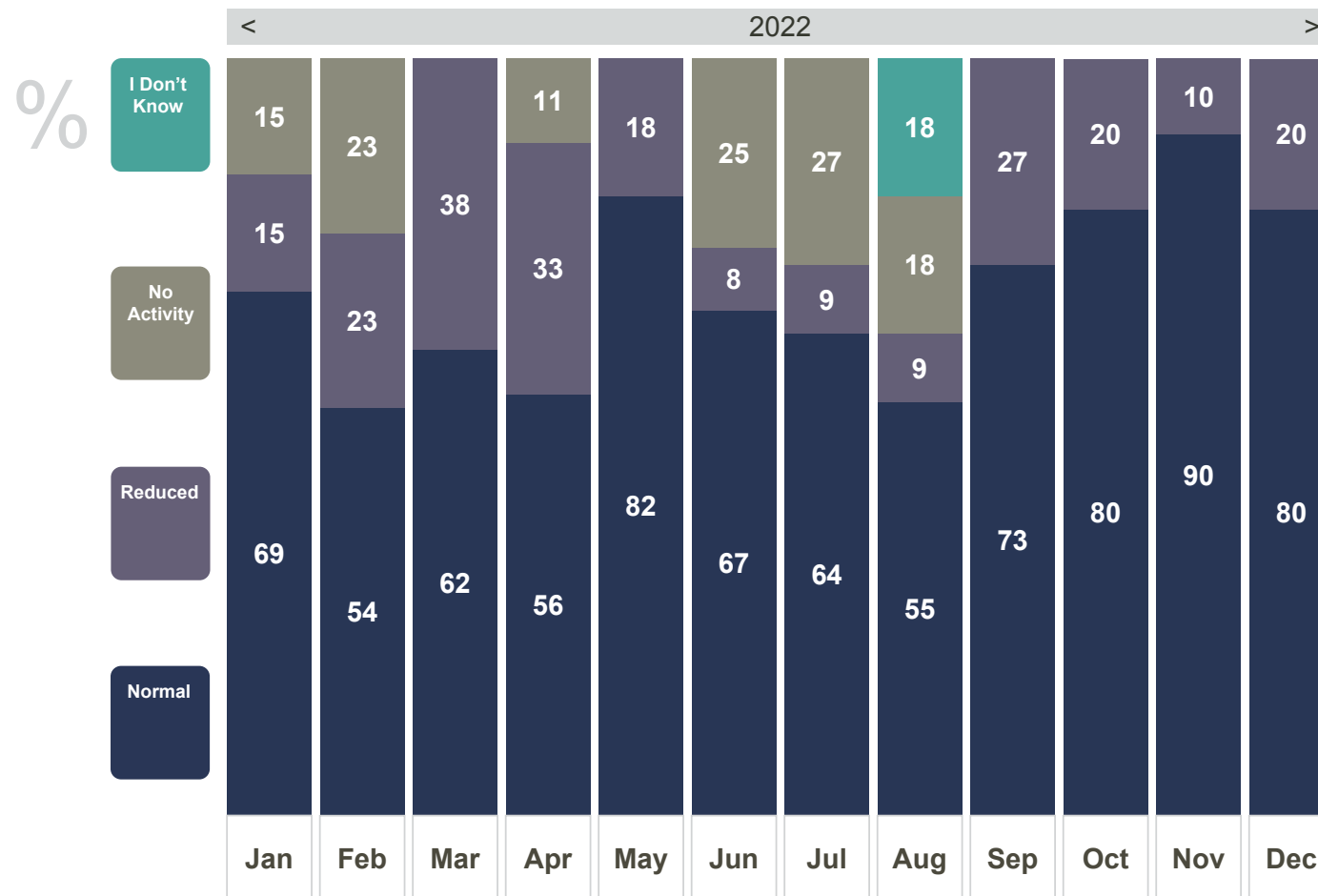
Middle East & Africa World

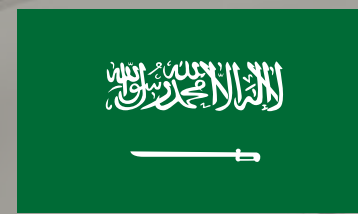
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



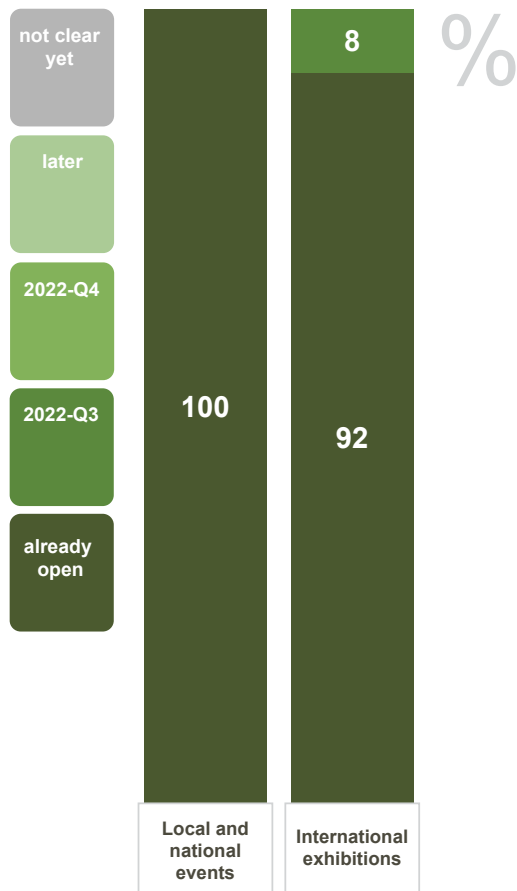


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

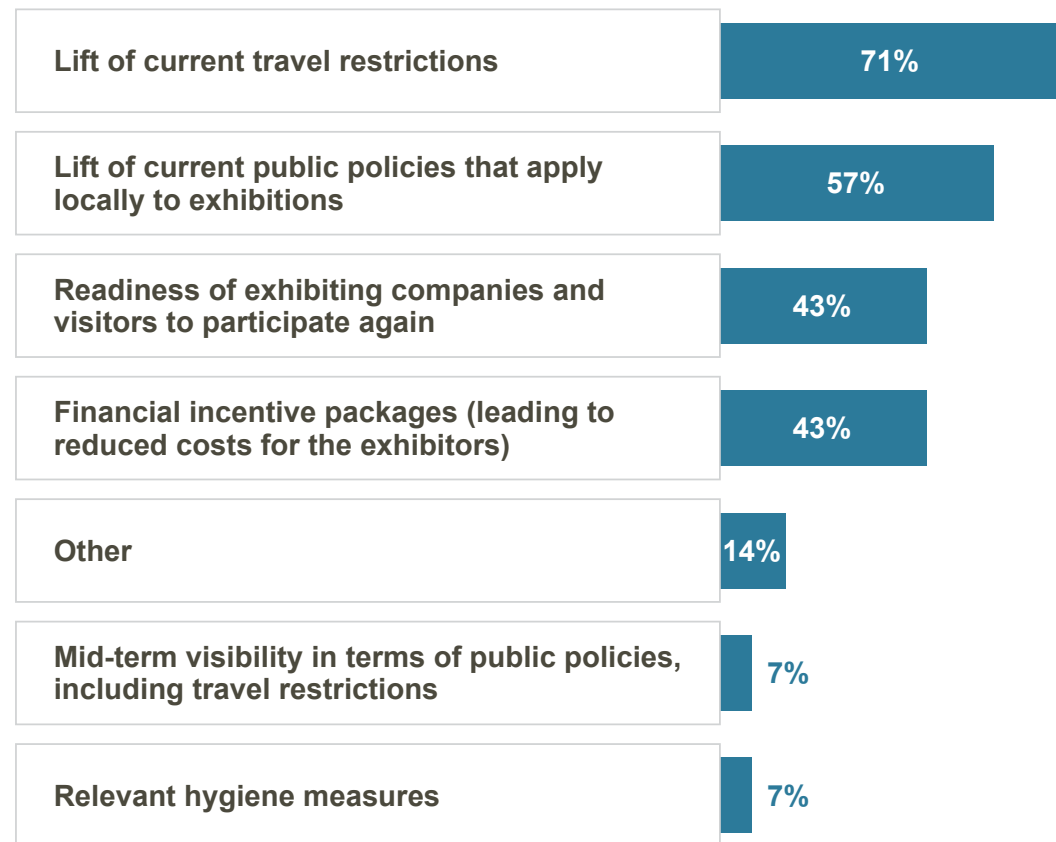




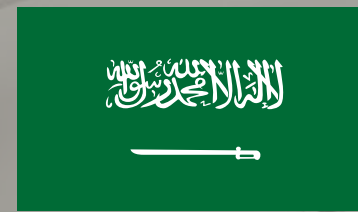
When do you believe exhibitions will open again in your city?



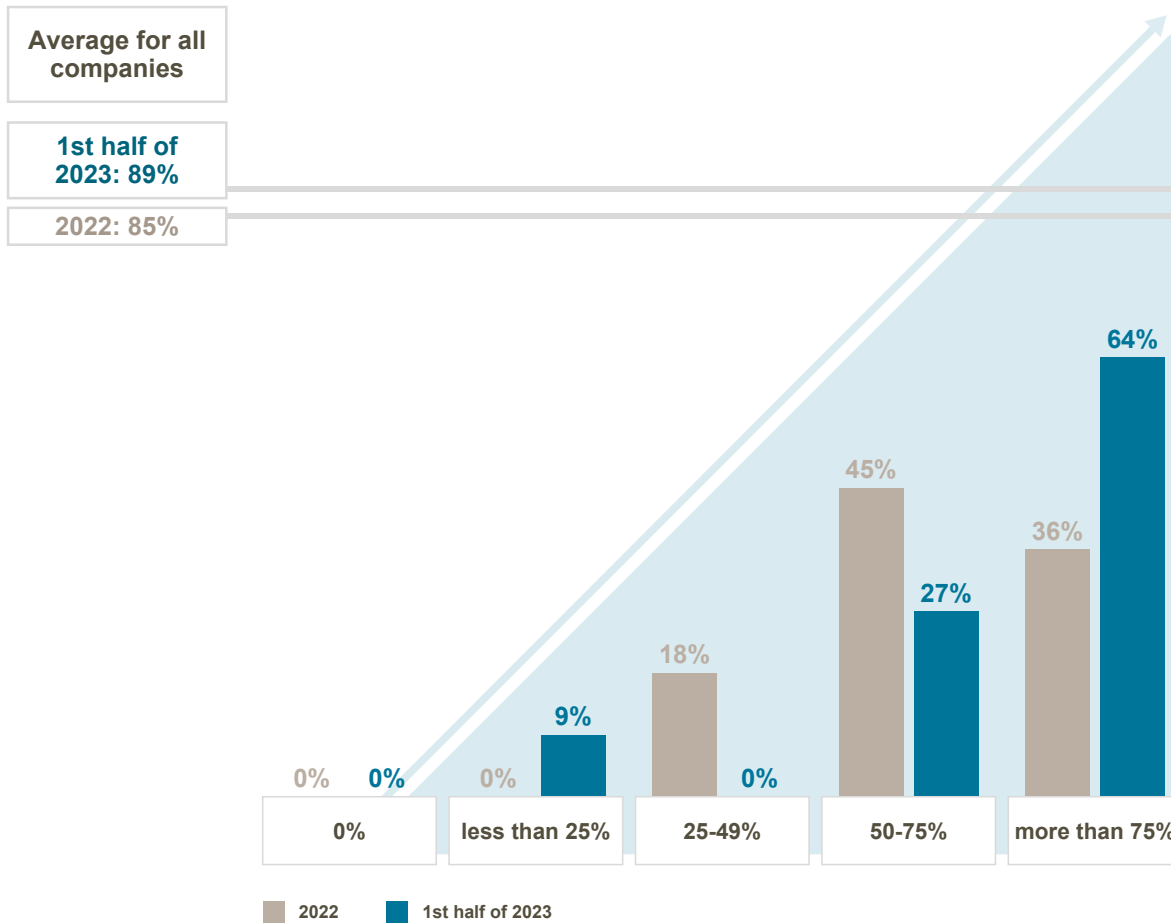
What do you believe would most help the “bounce back” of exhibitions?



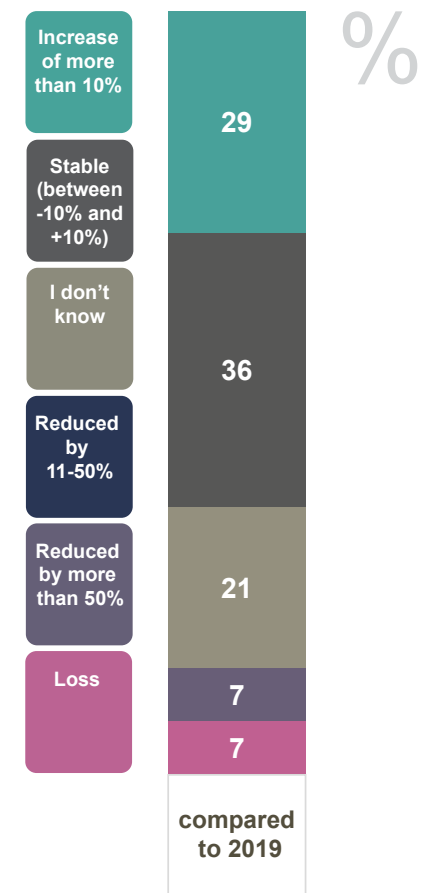
Detailed results for Saudi Arabia



Revenue compared to 2019

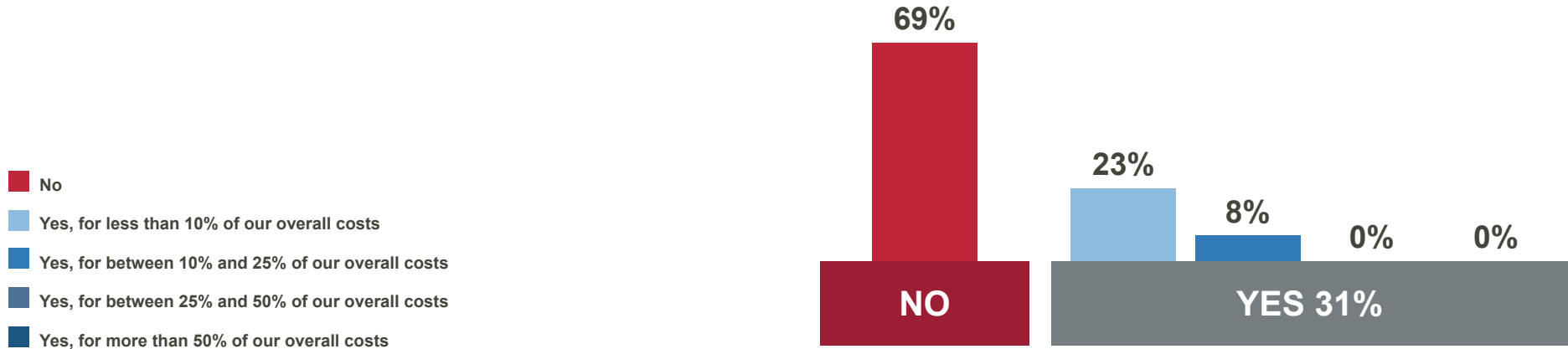


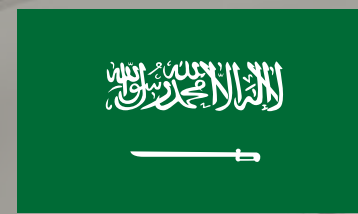
Operating Profits 2021





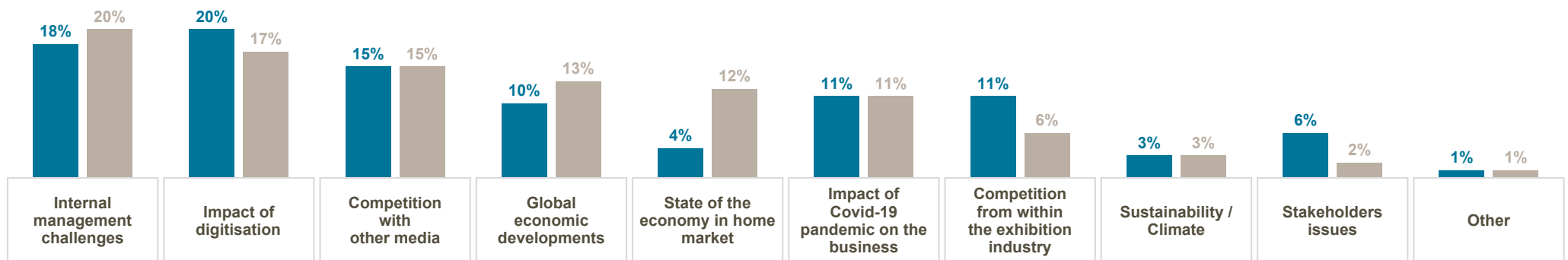
Did your company benefit from public financial support?





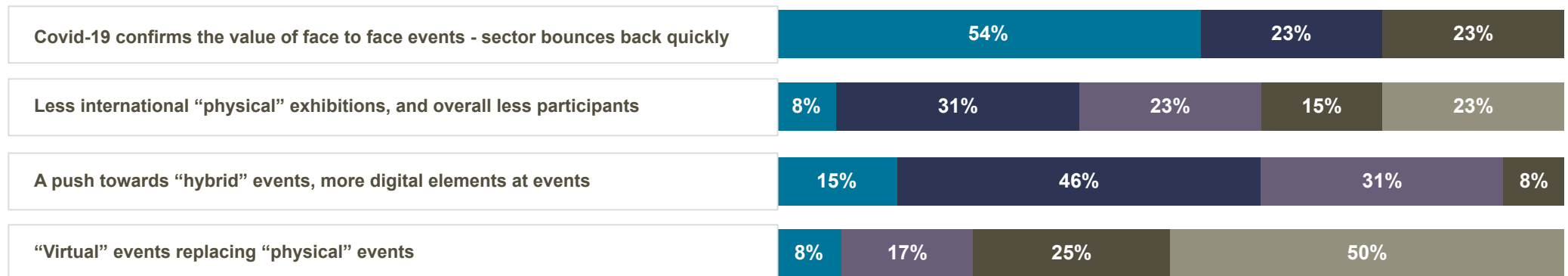
Most important business issues in the exhibition industry

Saudi Arabia Global



Format of exhibitions in the coming years

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

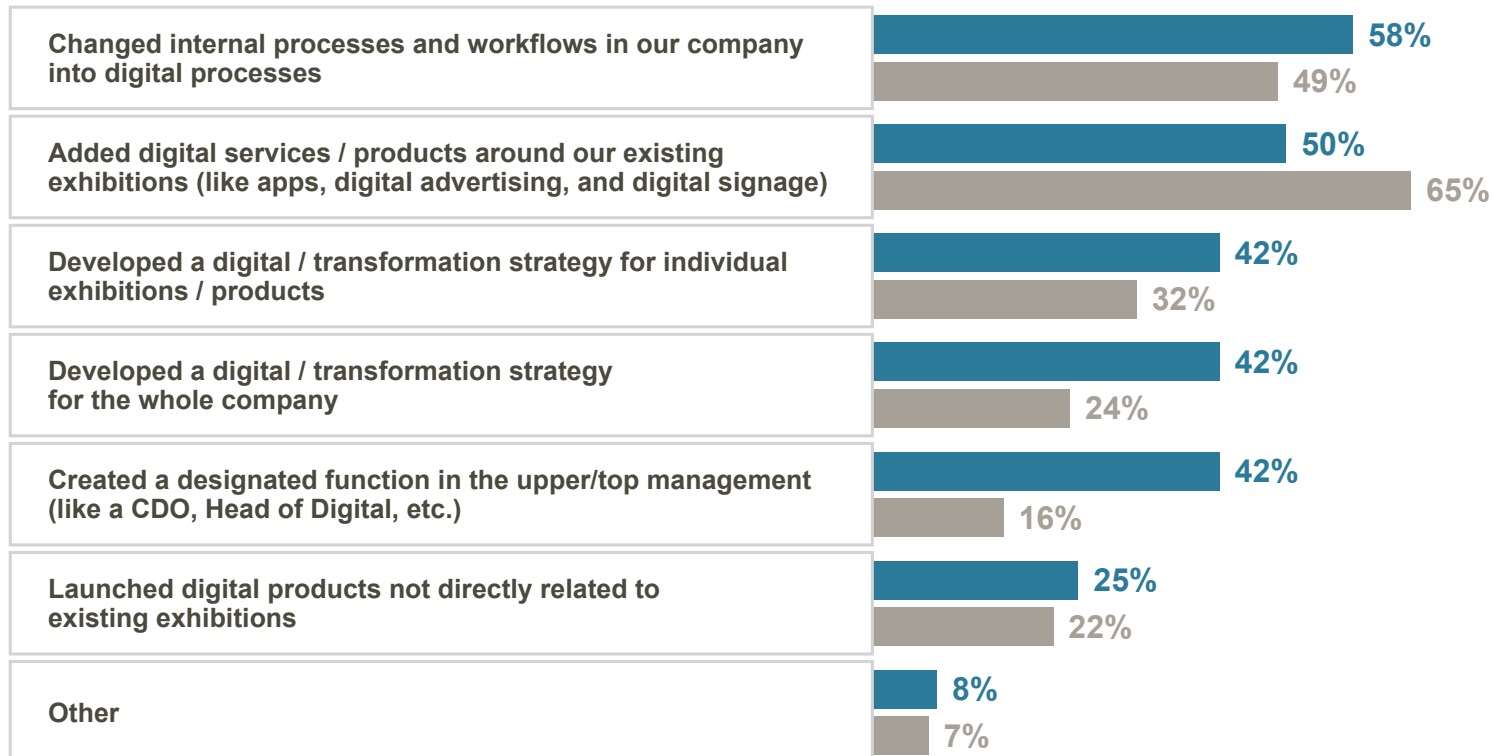




Digitisation: implementation in Saudi Arabia and globally

Saudi Arabia

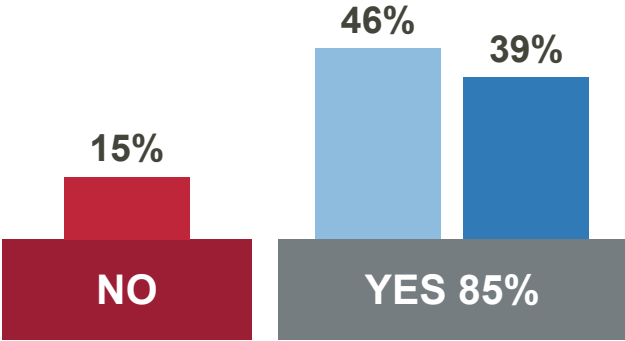
Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

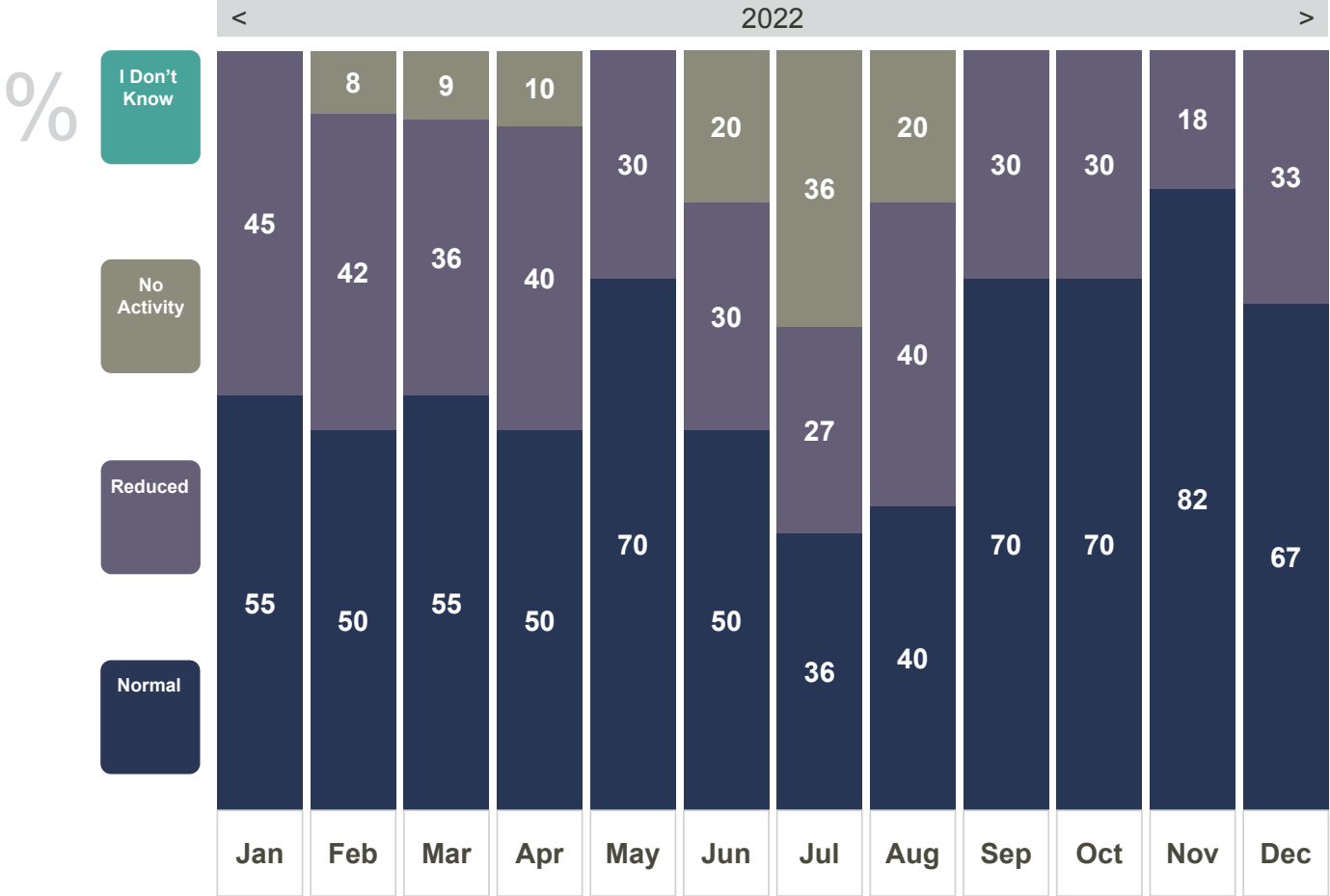
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



Detailed results for United Arab Emirates

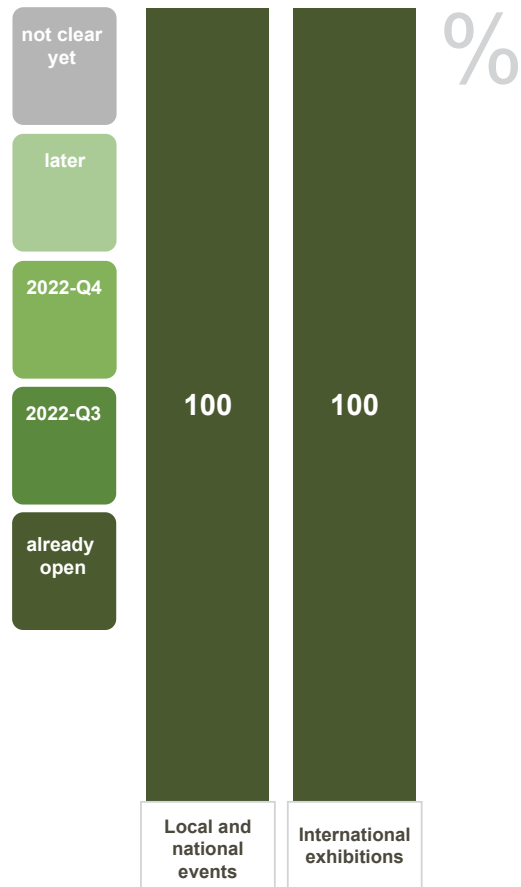


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

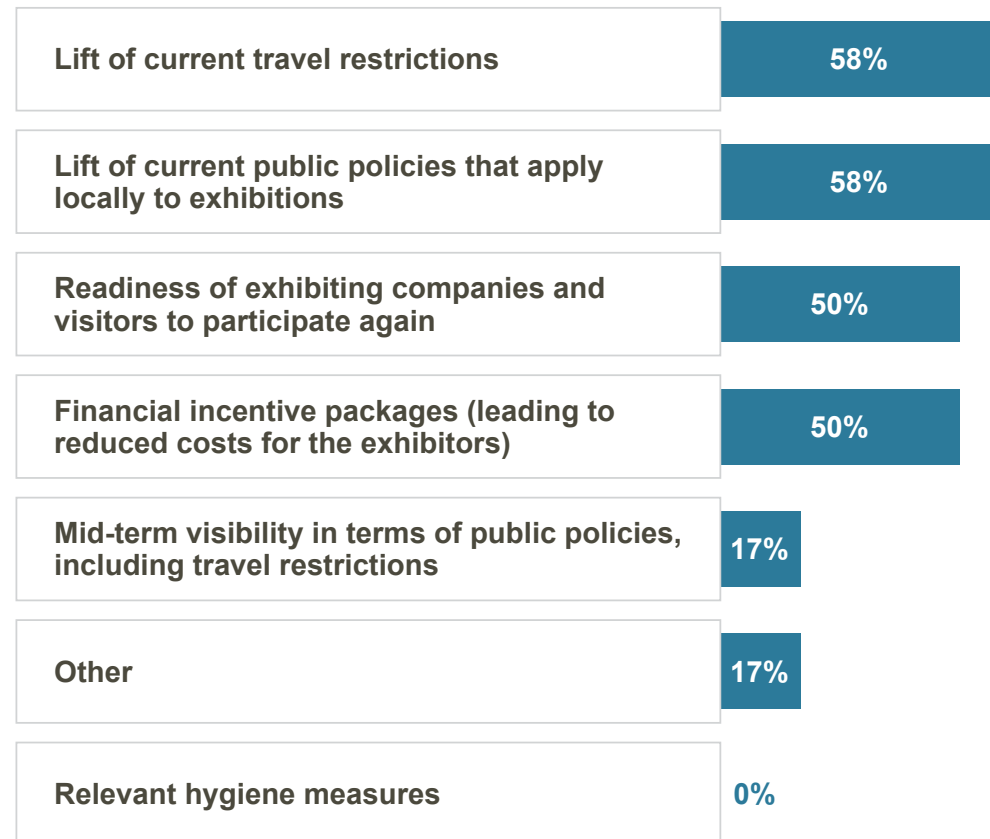




When do you believe exhibitions will open again in your city?



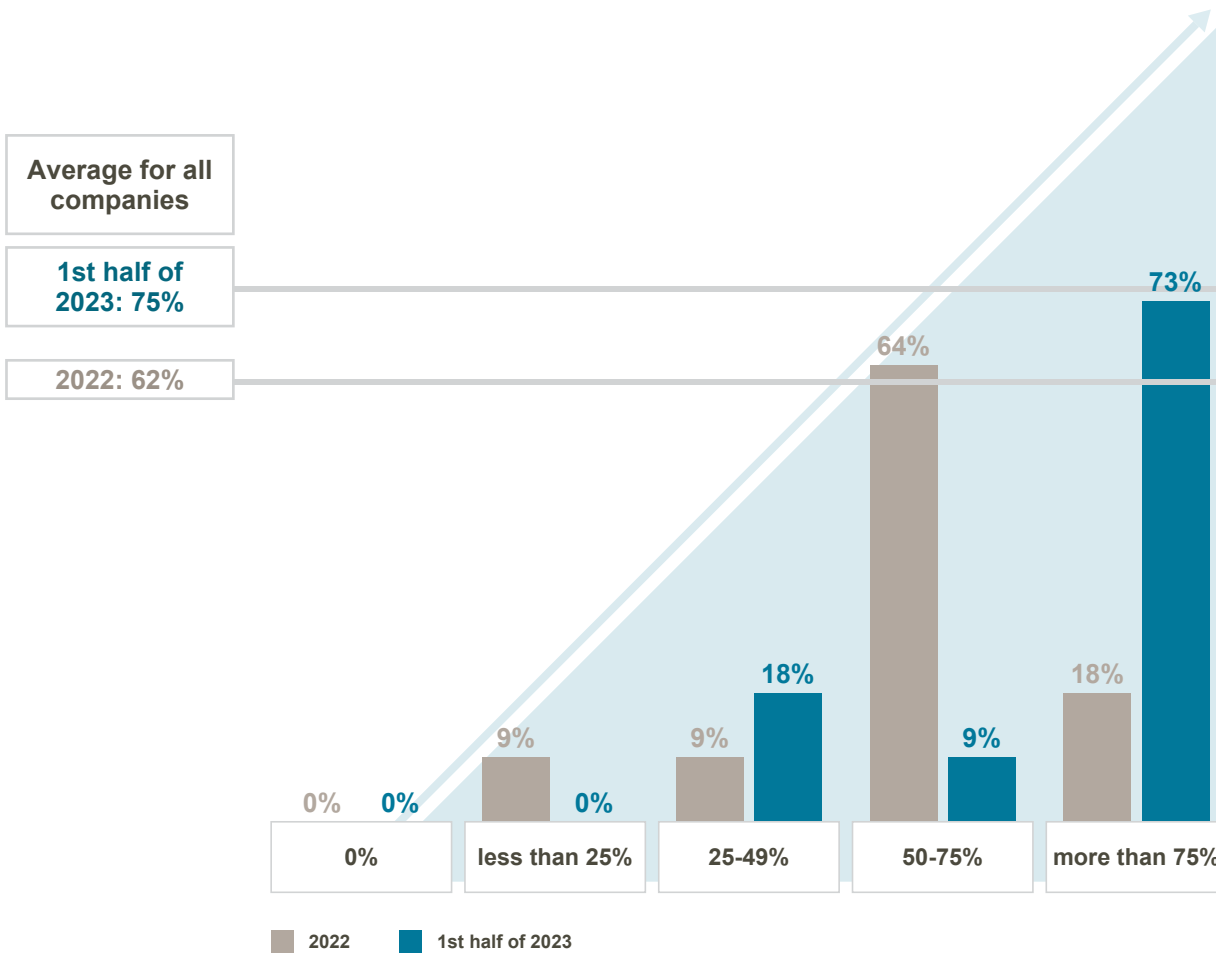
What do you believe would most help the “bounce back” of exhibitions?



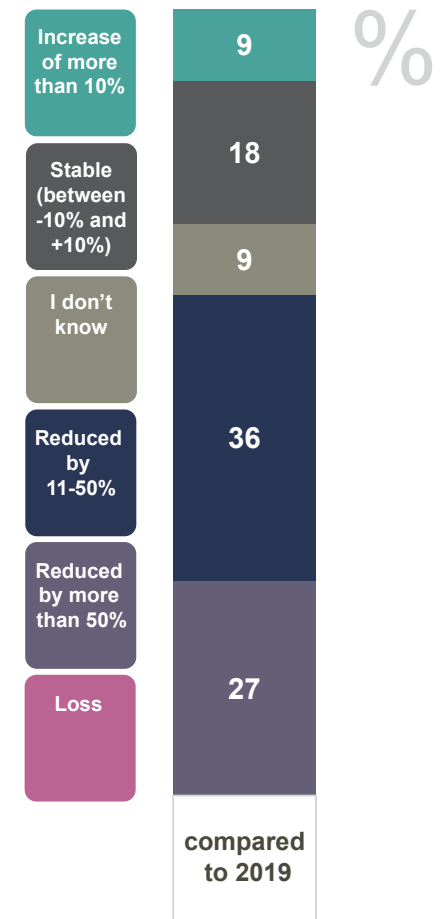
Detailed results for United Arab Emirates



Revenue compared to 2019

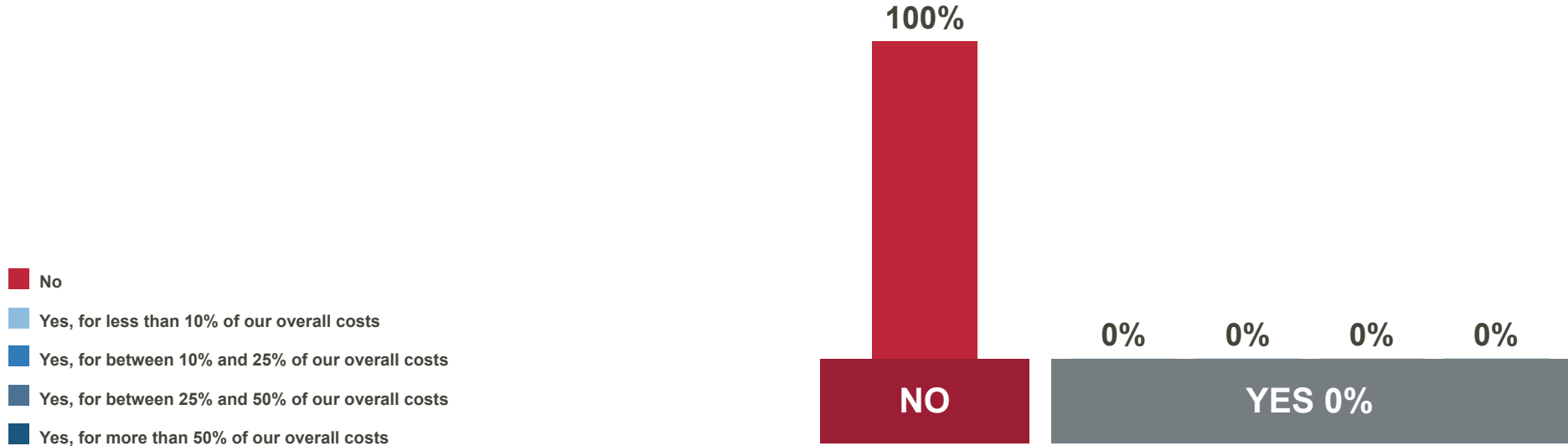


Operating Profits 2021





Did your company benefit from public financial support?



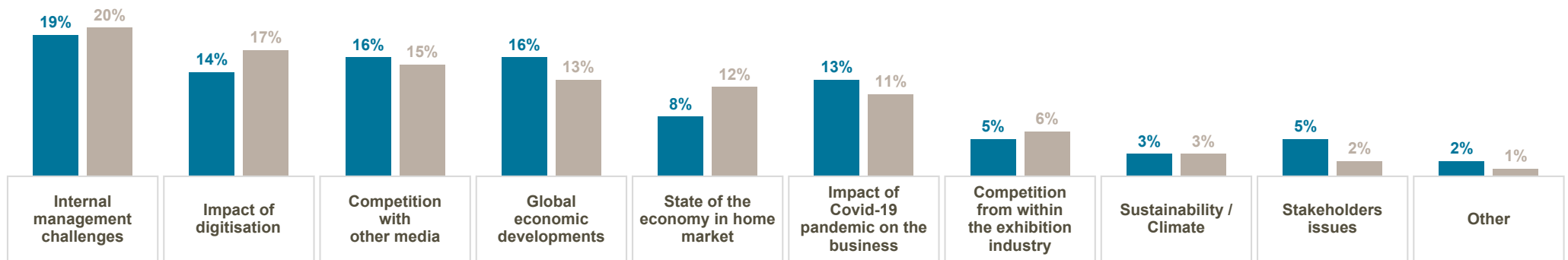
Detailed results for United Arab Emirates



Most important business issues in the exhibition industry

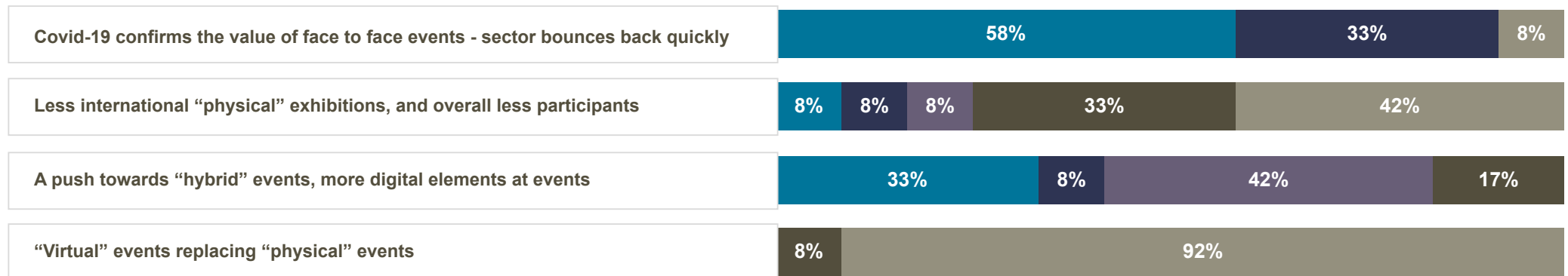
United Arab Emirates

Global



Format of exhibitions in the coming years

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

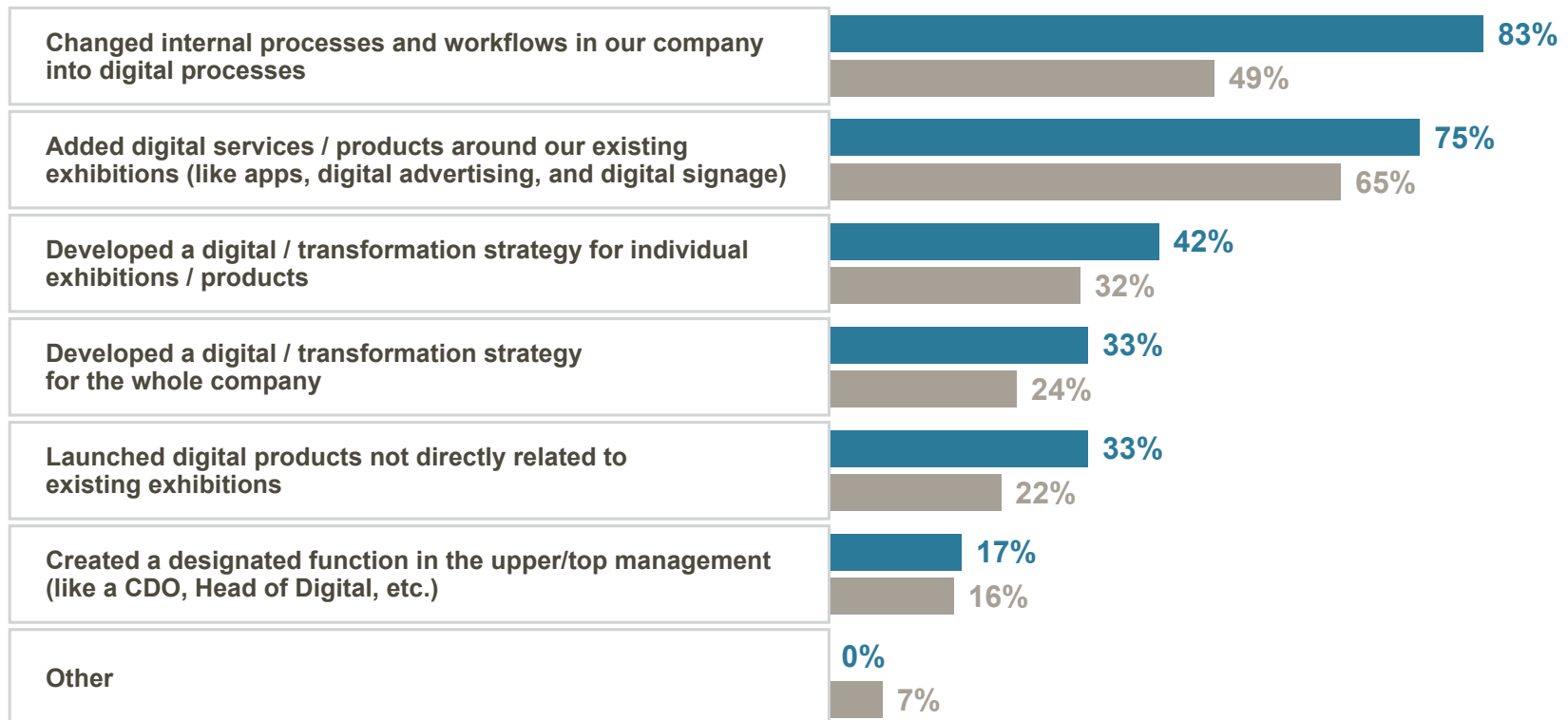




Digitisation: implementation in United Arab Emirates and globally

United Arab Emirates

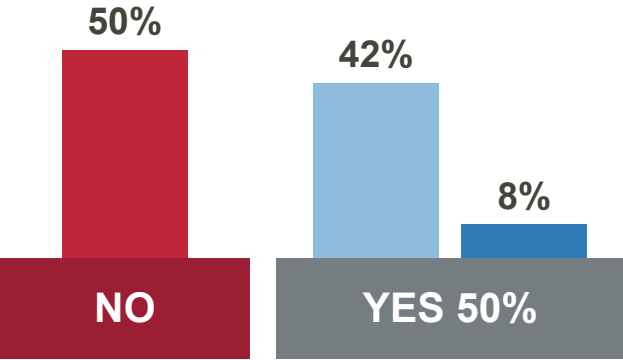
Global





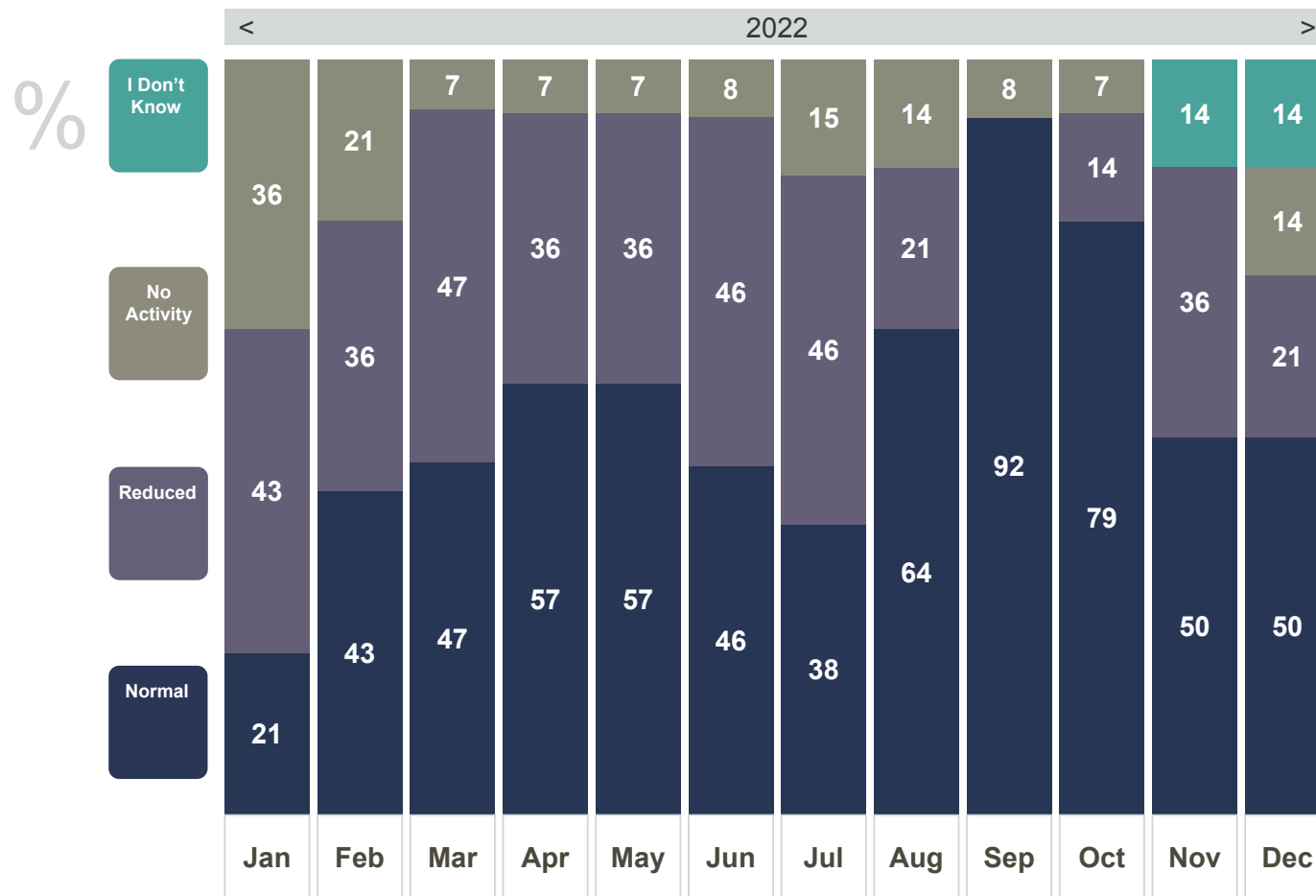
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



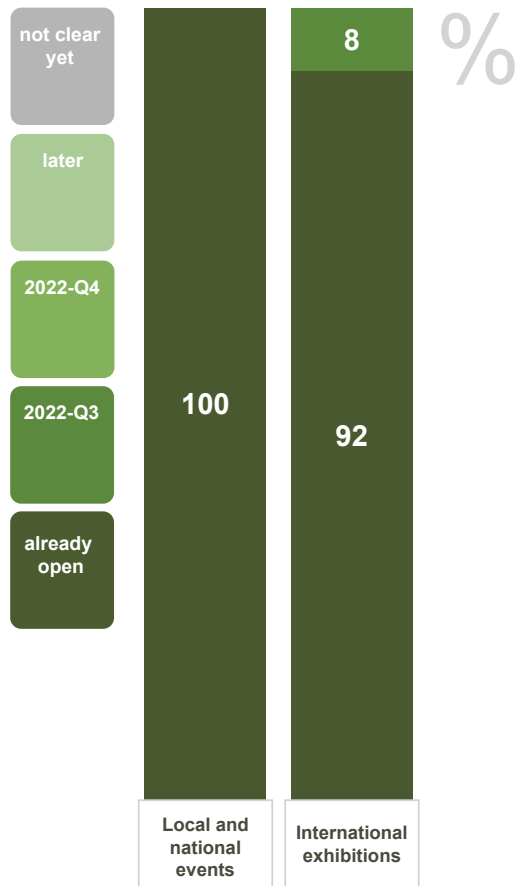


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

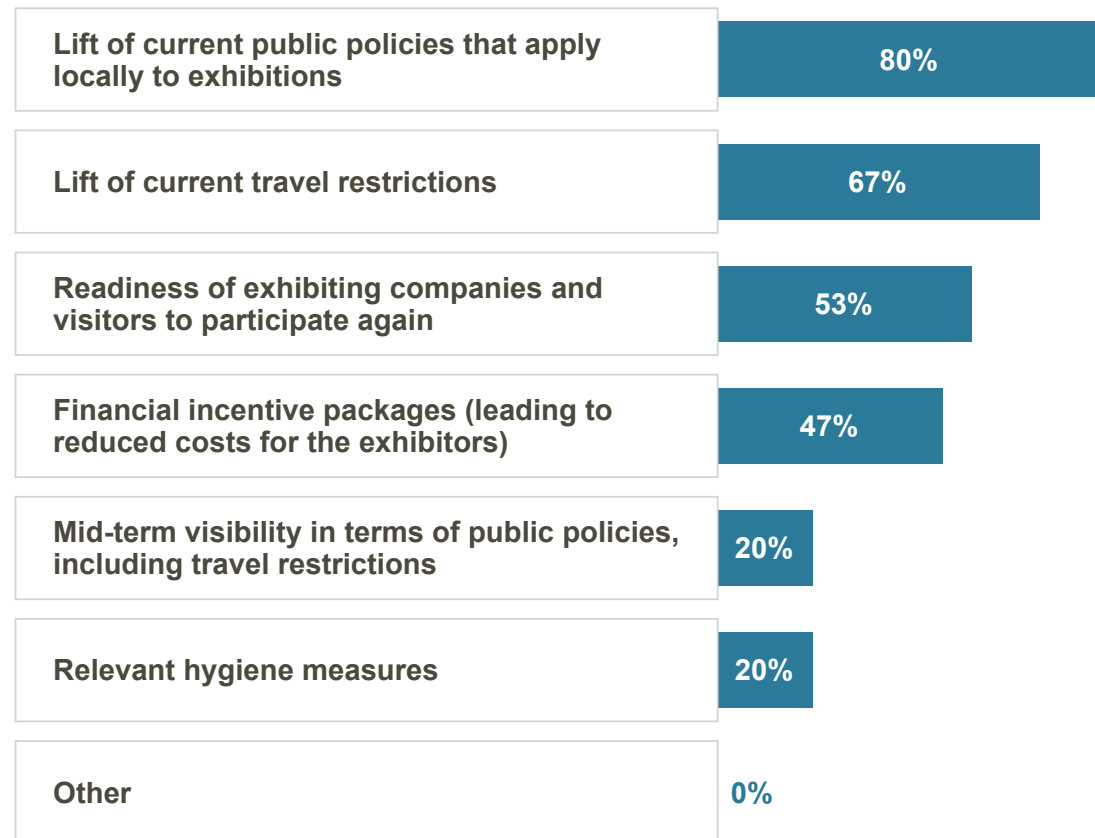




When do you believe exhibitions will open again in your city?

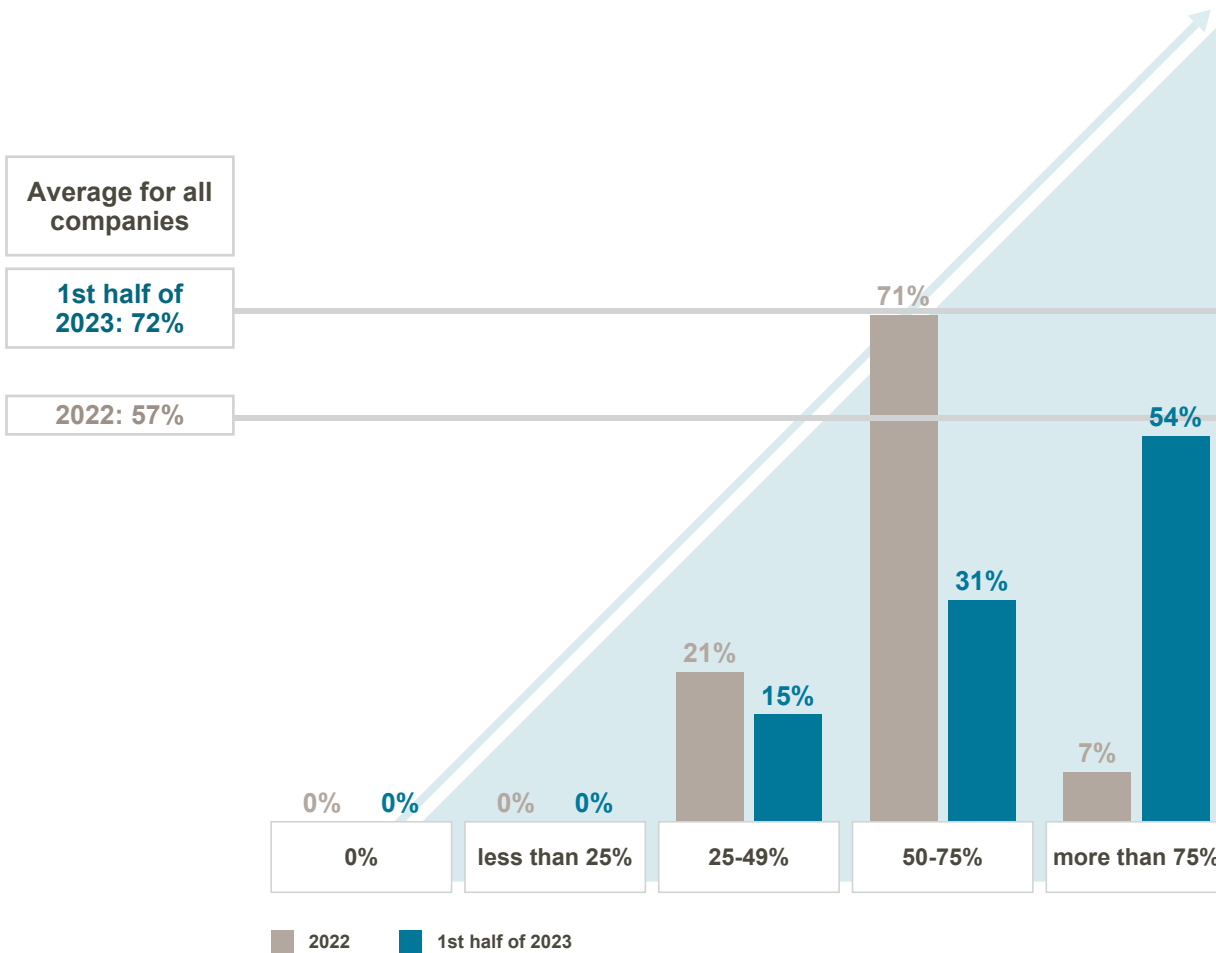


What do you believe would most help the “bounce back” of exhibitions?

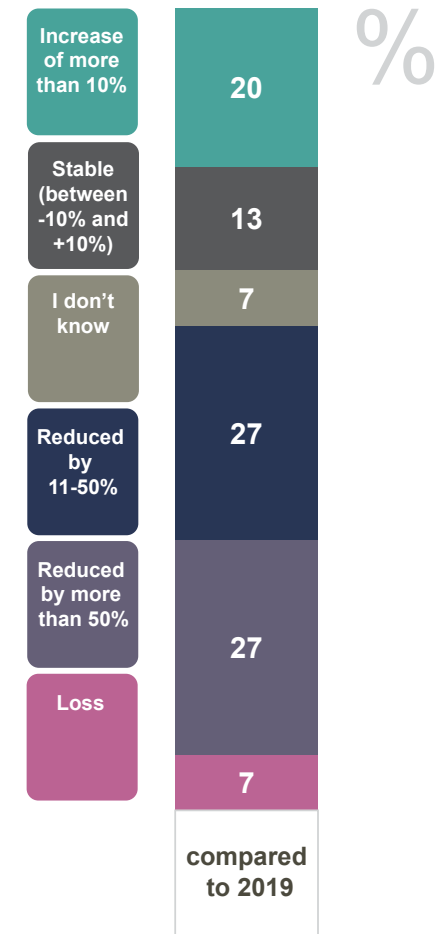




Revenue compared to 2019

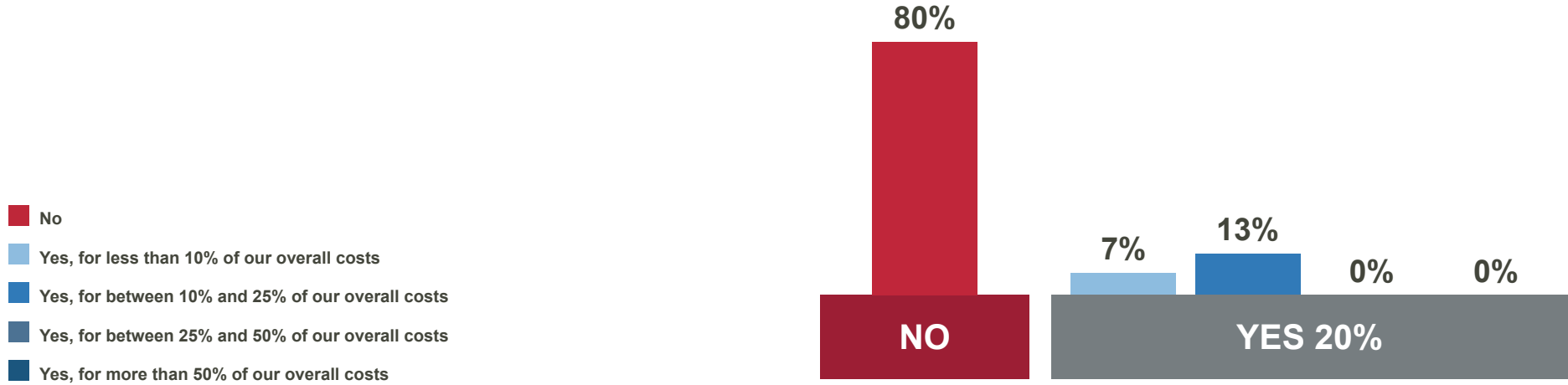


Operating Profits 2021





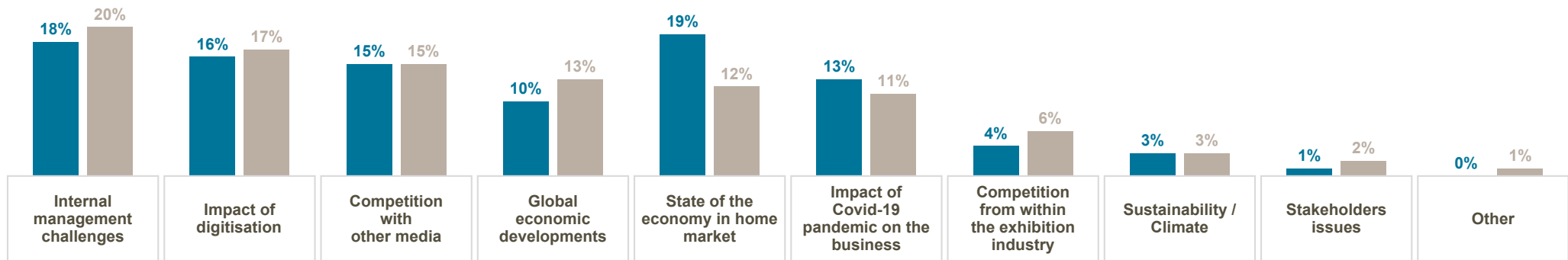
Did your company benefit from public financial support?





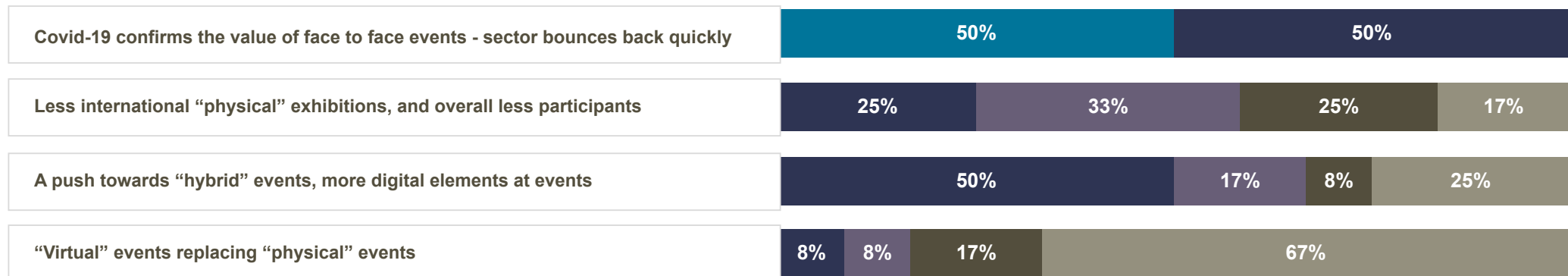
Most important business issues in the exhibition industry

South Africa Global



Format of exhibitions in the coming years

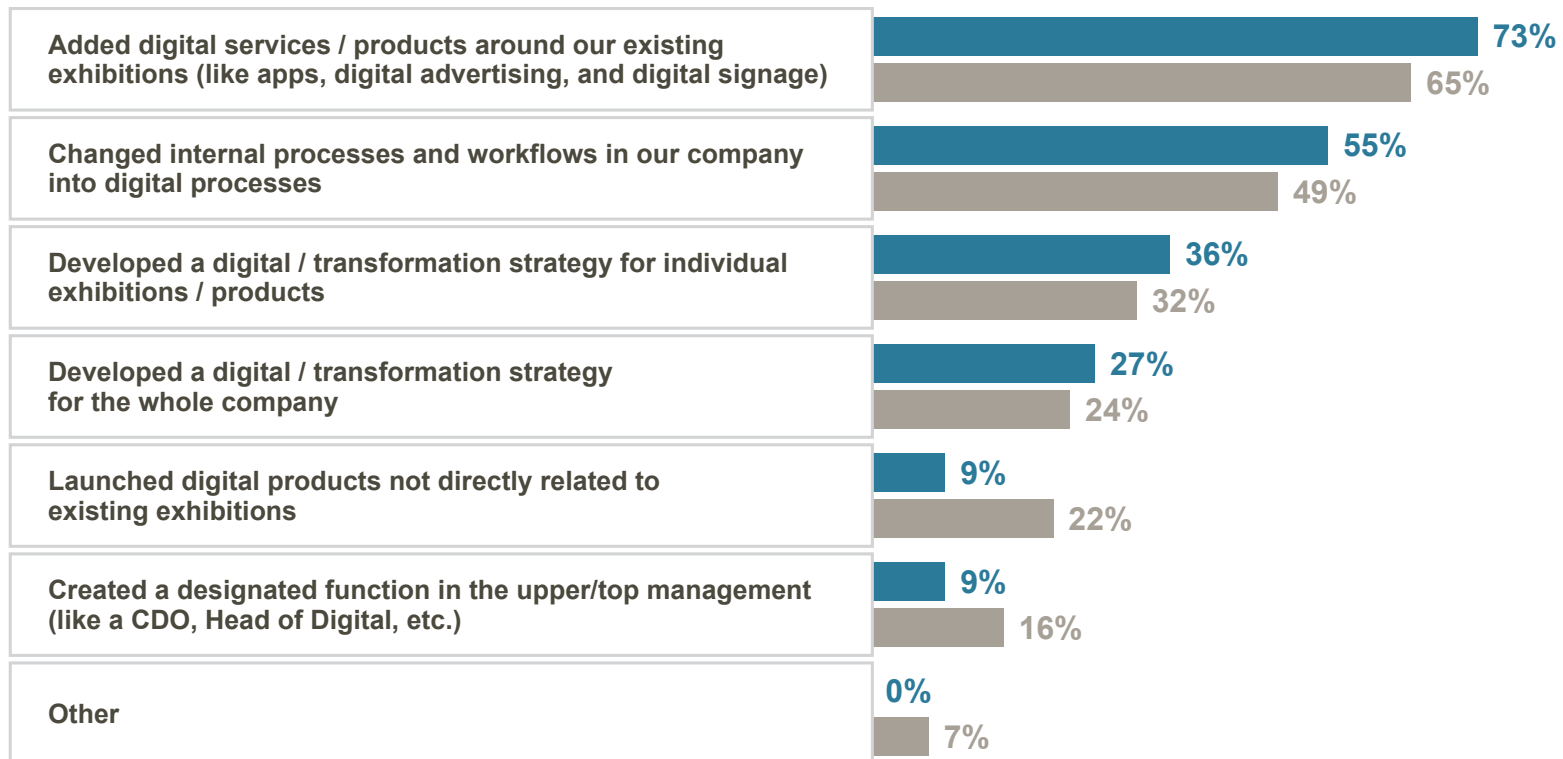
Yes, for sure Most probably Not sure Not sure at all Definitely not





Digitisation: implementation in South Africa and globally

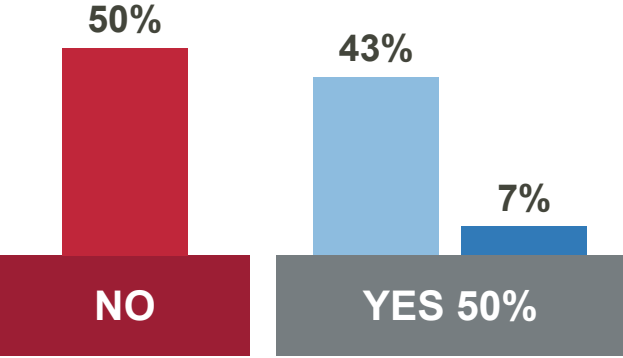
South Africa
Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



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

Asia-Pacific

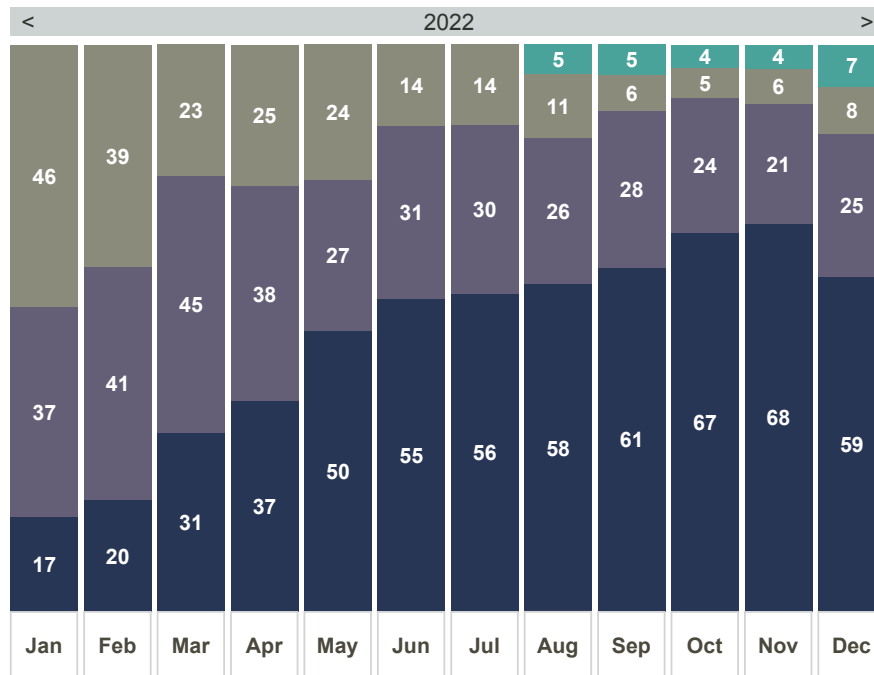
Operations - Reopening Exhibitions Asia-Pacific



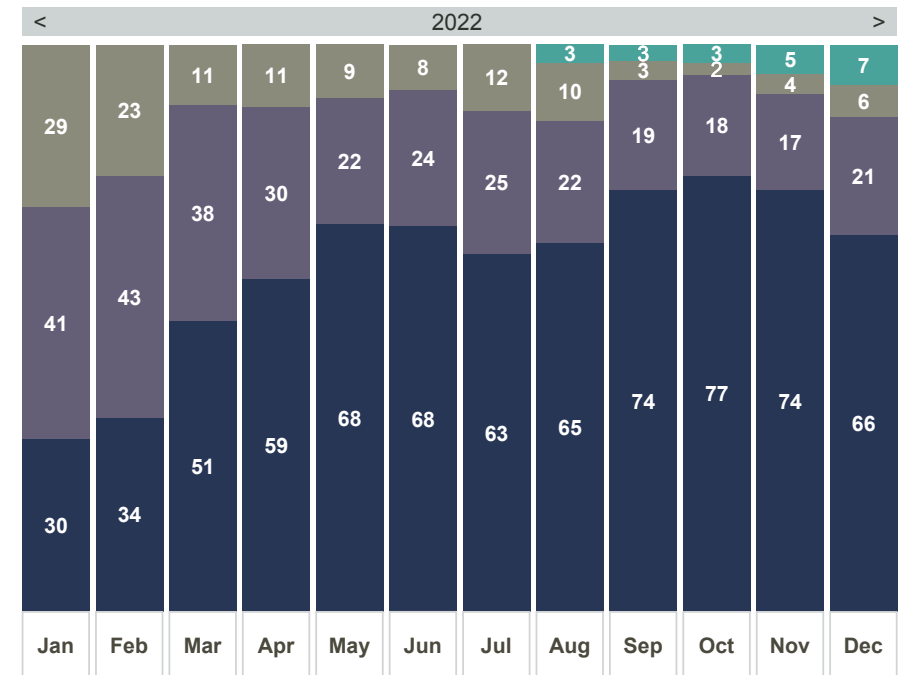
Situation of the industry operations for the 1st half of 2022, and current predictions for the 2nd half of 2022



Asia-Pacific



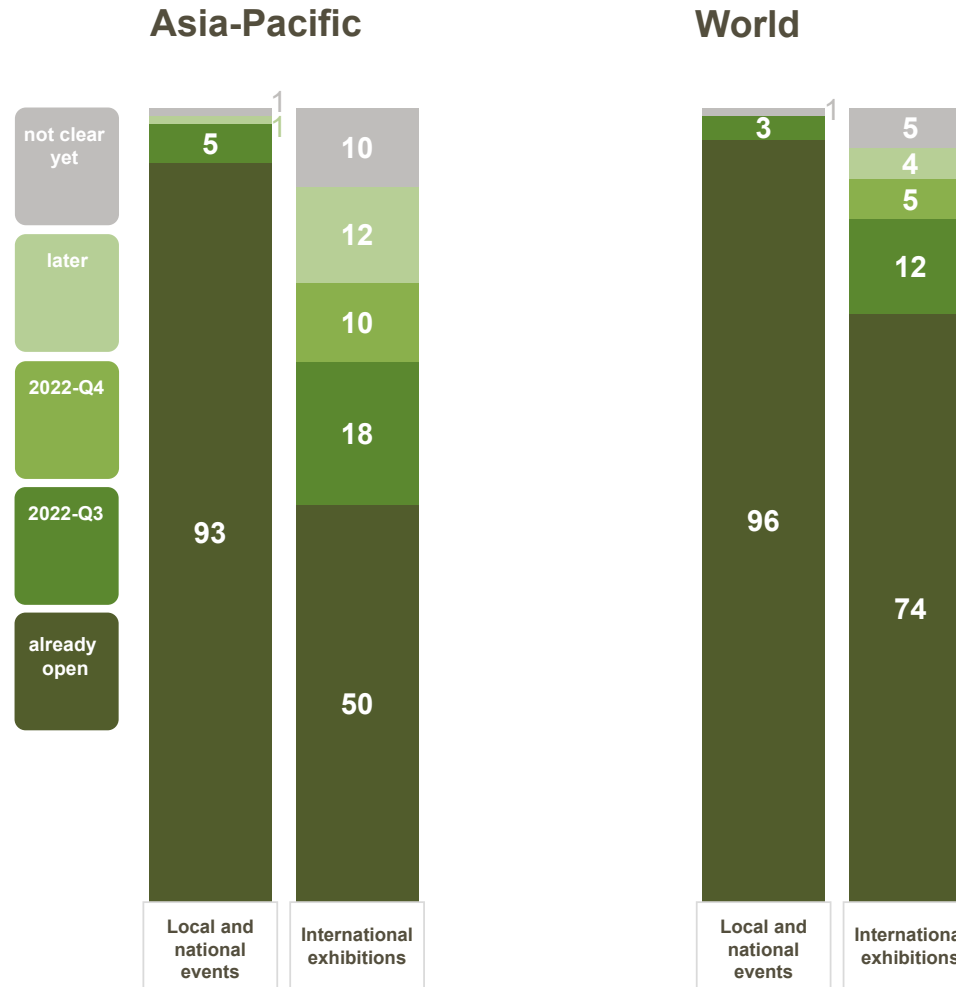
World



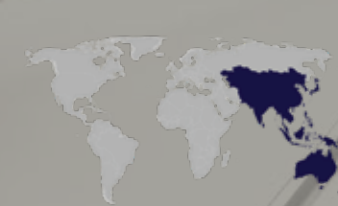
%



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

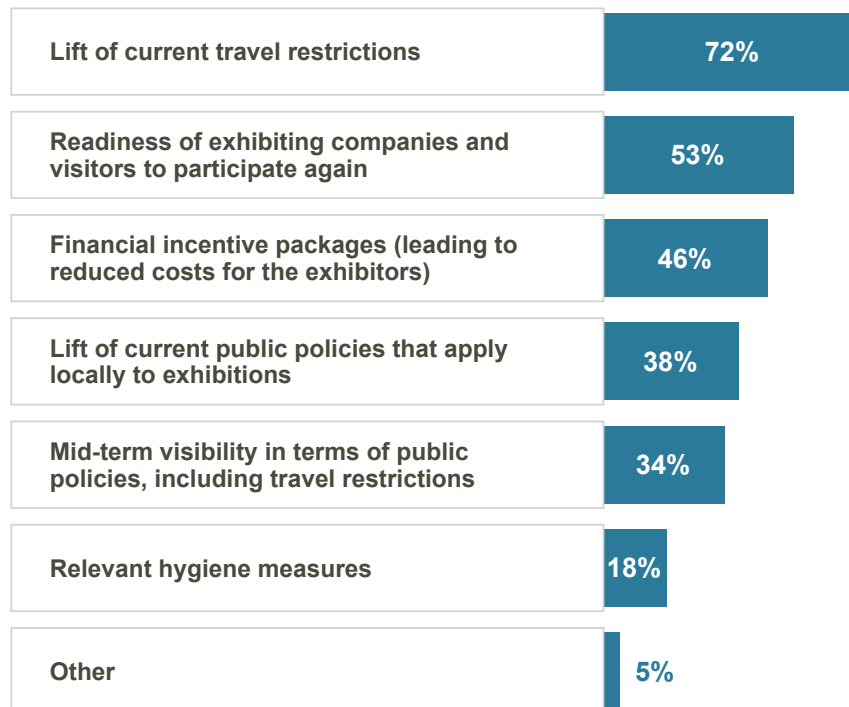


%

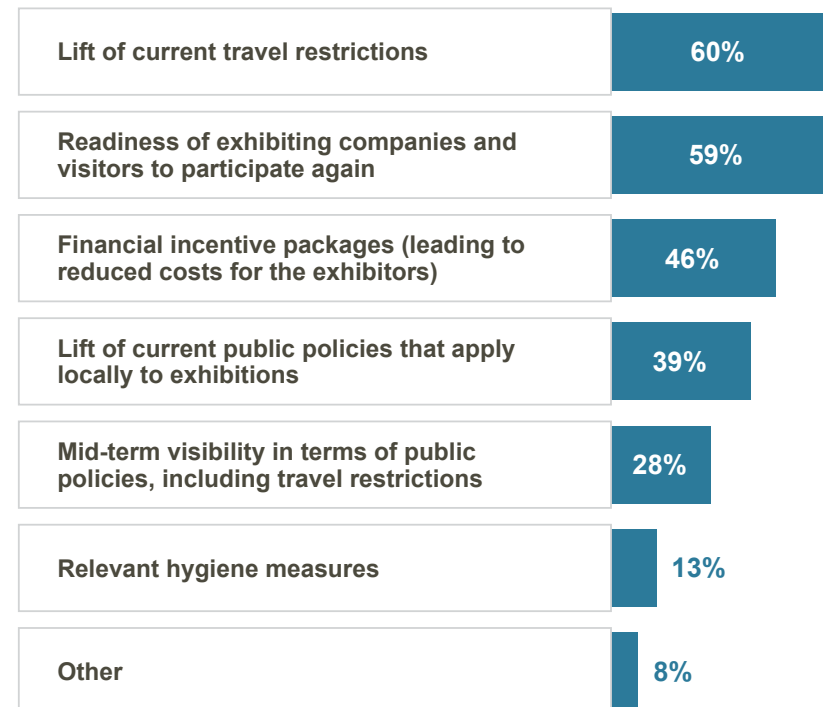


What do you believe would most help the “bounce back” of exhibitions?

Asia-Pacific

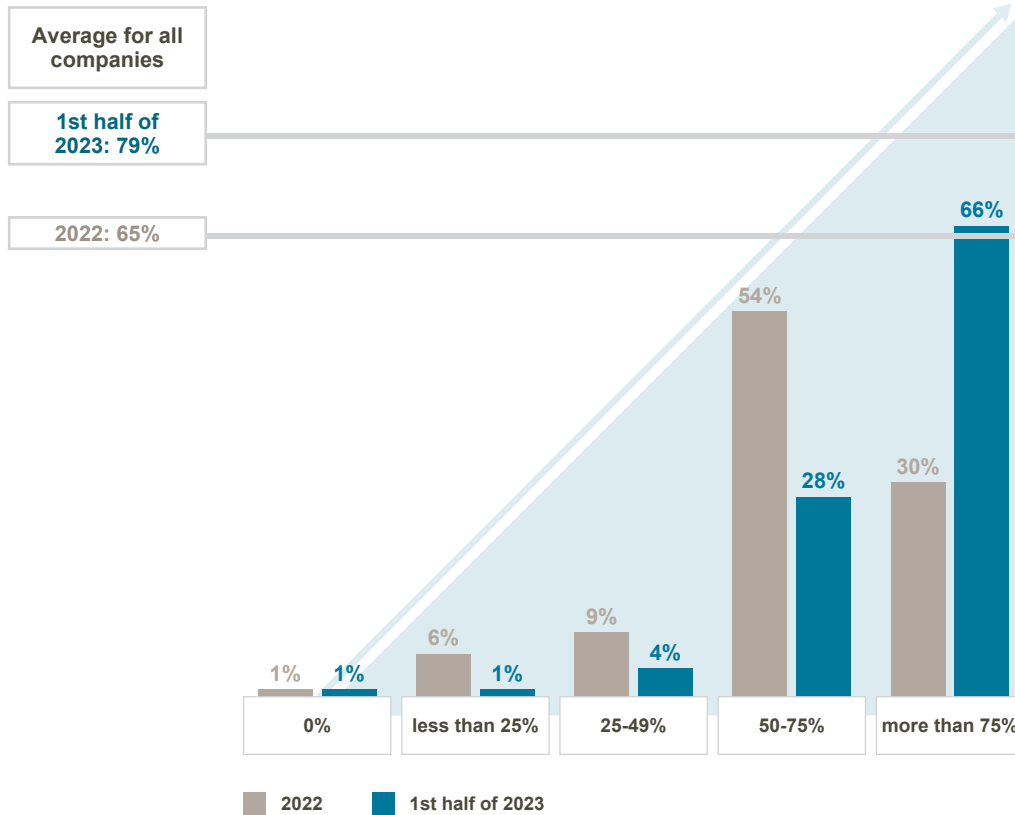


World

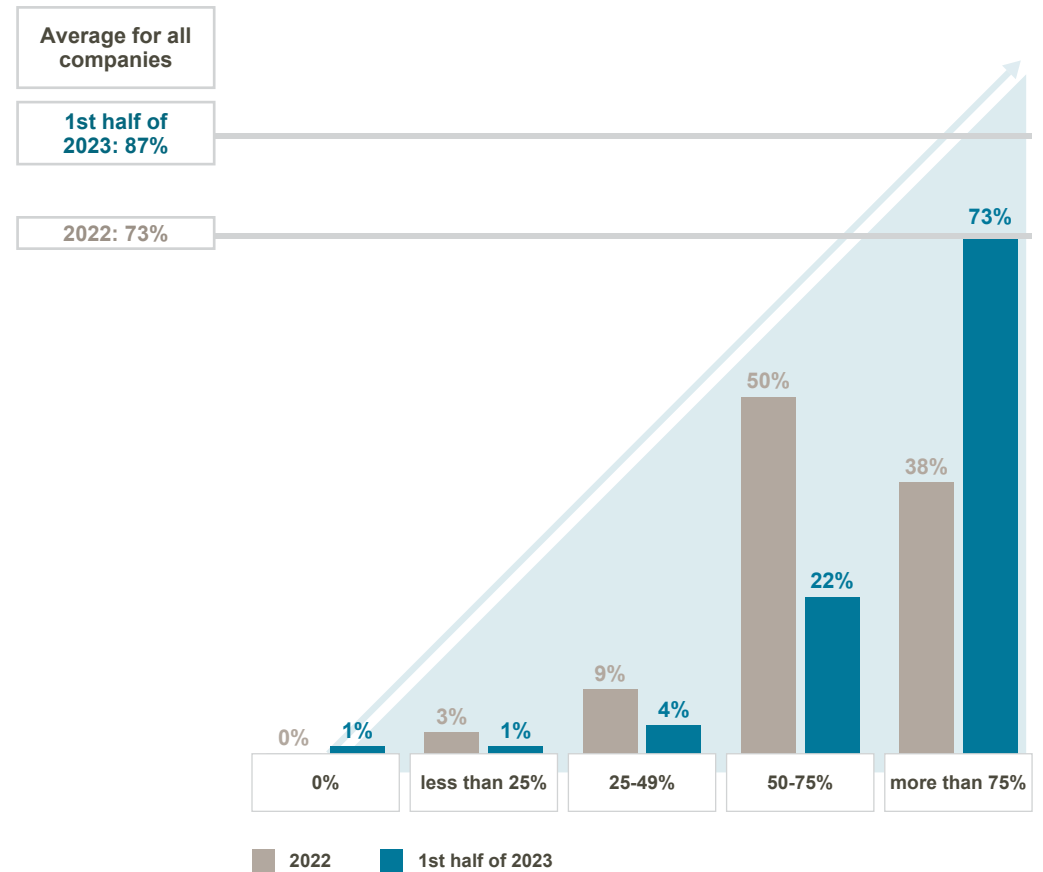


Revenue compared to 2019

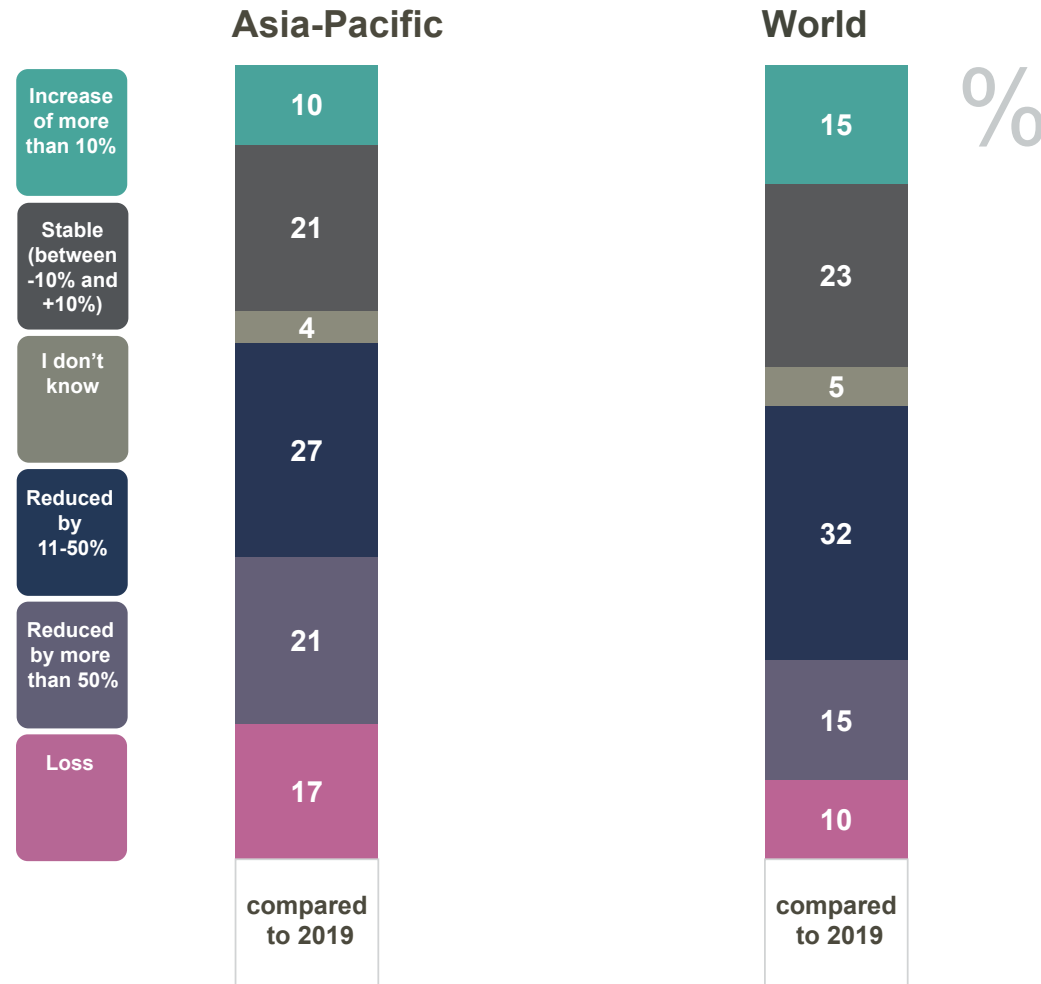
Asia-Pacific



World



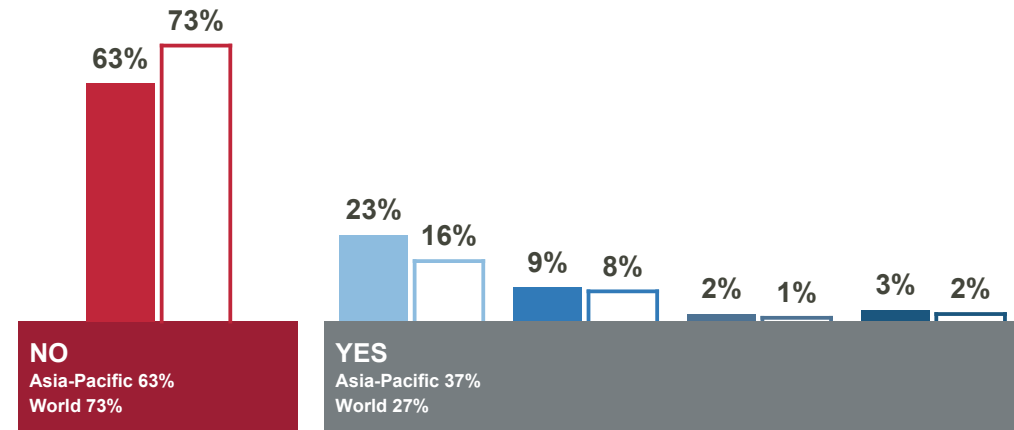
Operating profit 2019 Asia-Pacific



Did your company benefit from public financial support?

Asia-Pacific World

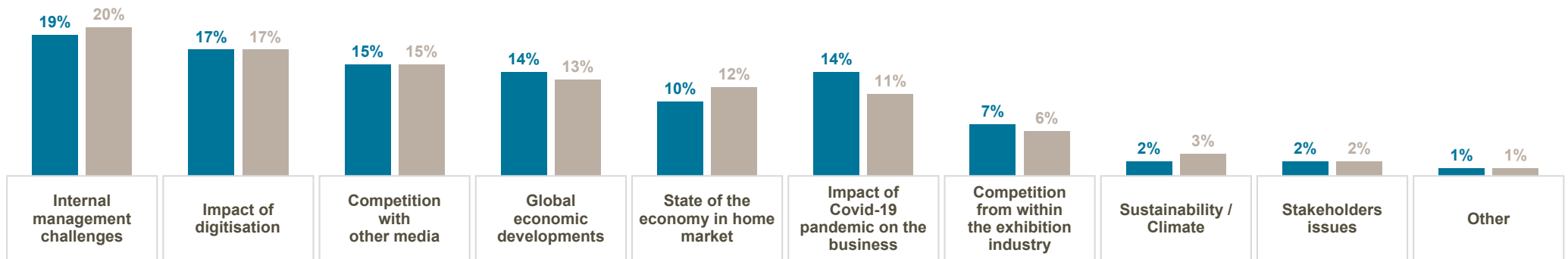
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs



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

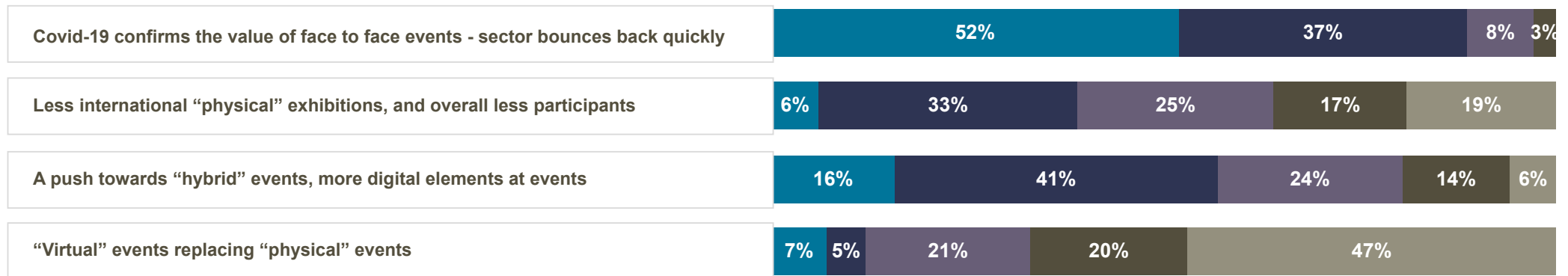
Most important business issues in the exhibition industry

Asia-Pacific Global



Format of exhibitions in the coming years

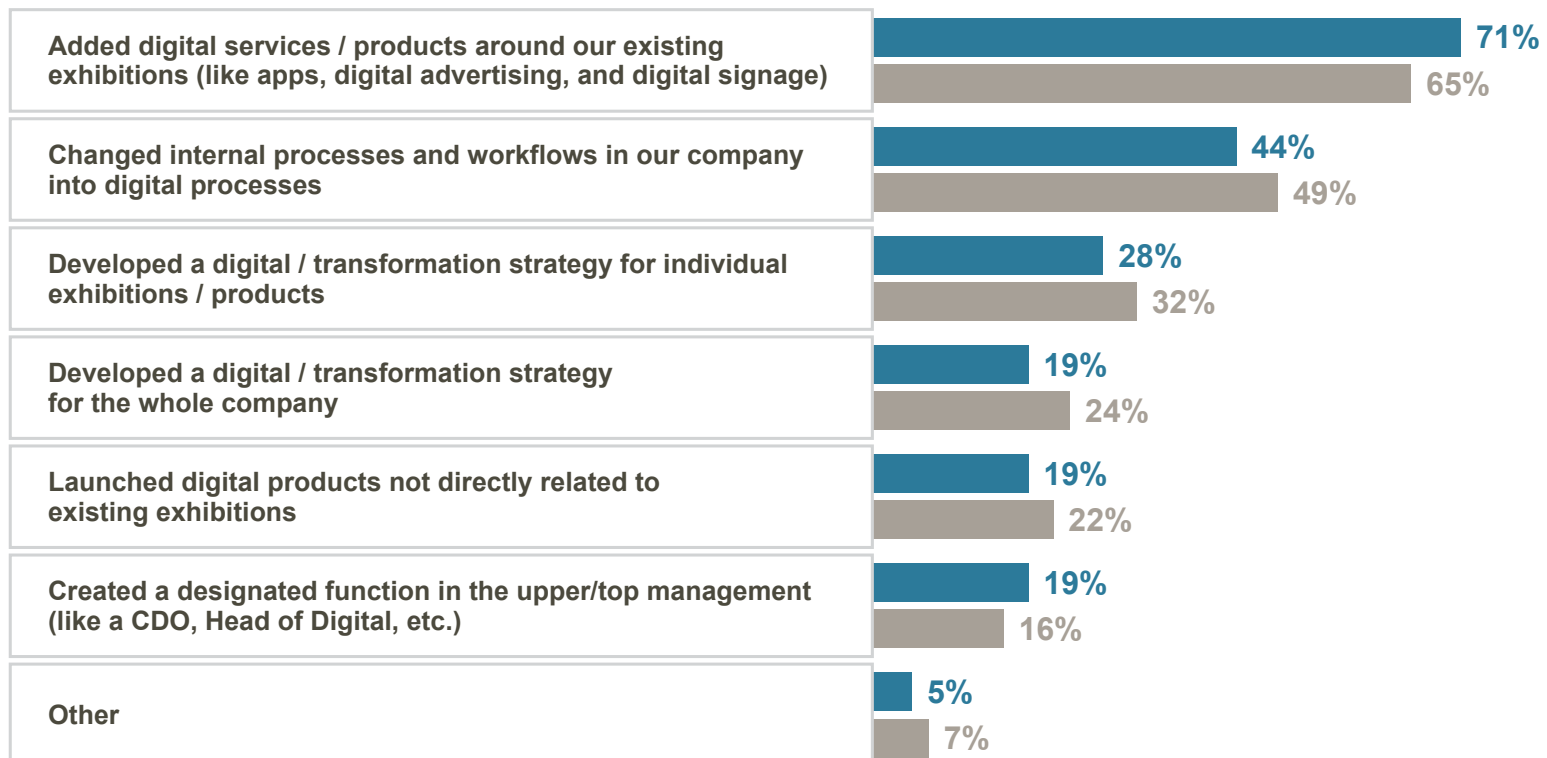
Yes, for sure Most probably Not sure Not sure at all Definitely not



Digitisation: implementation in Asia-Pacific and globally

Asia-Pacific

Global

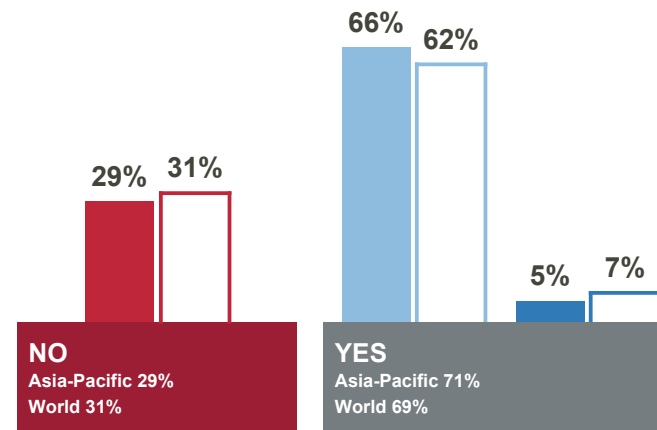


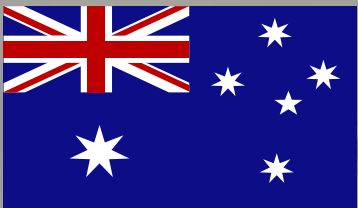
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

Asia-Pacific

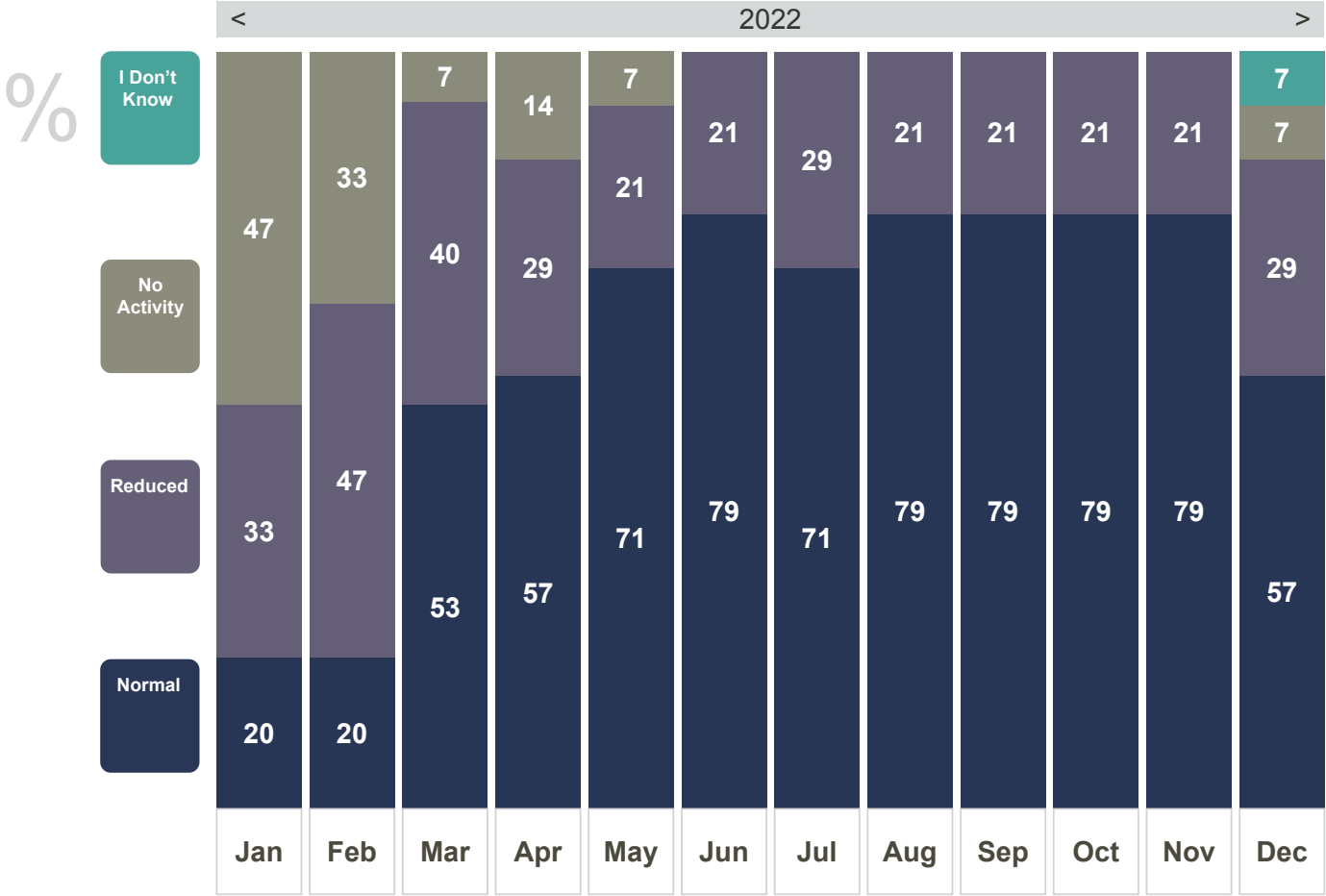
World

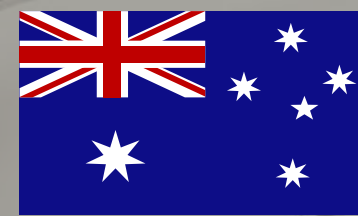
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



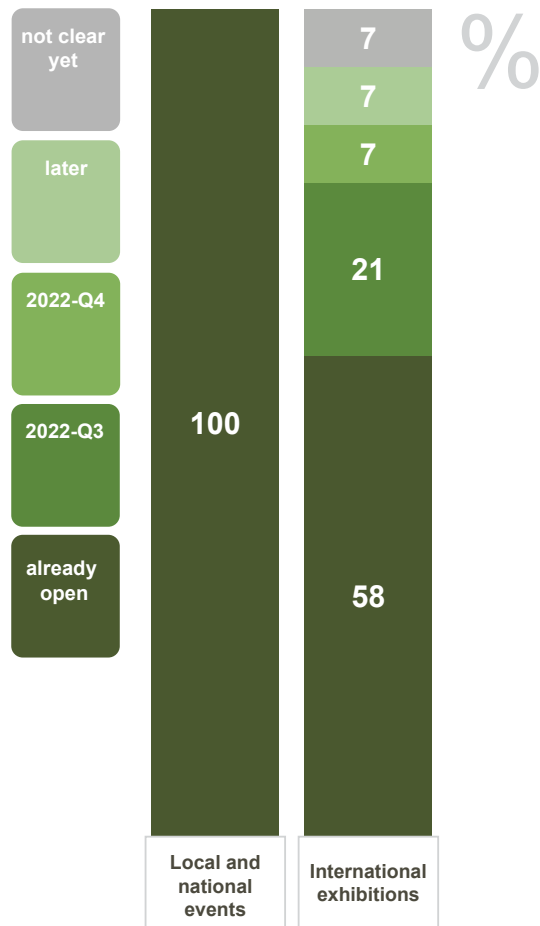


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

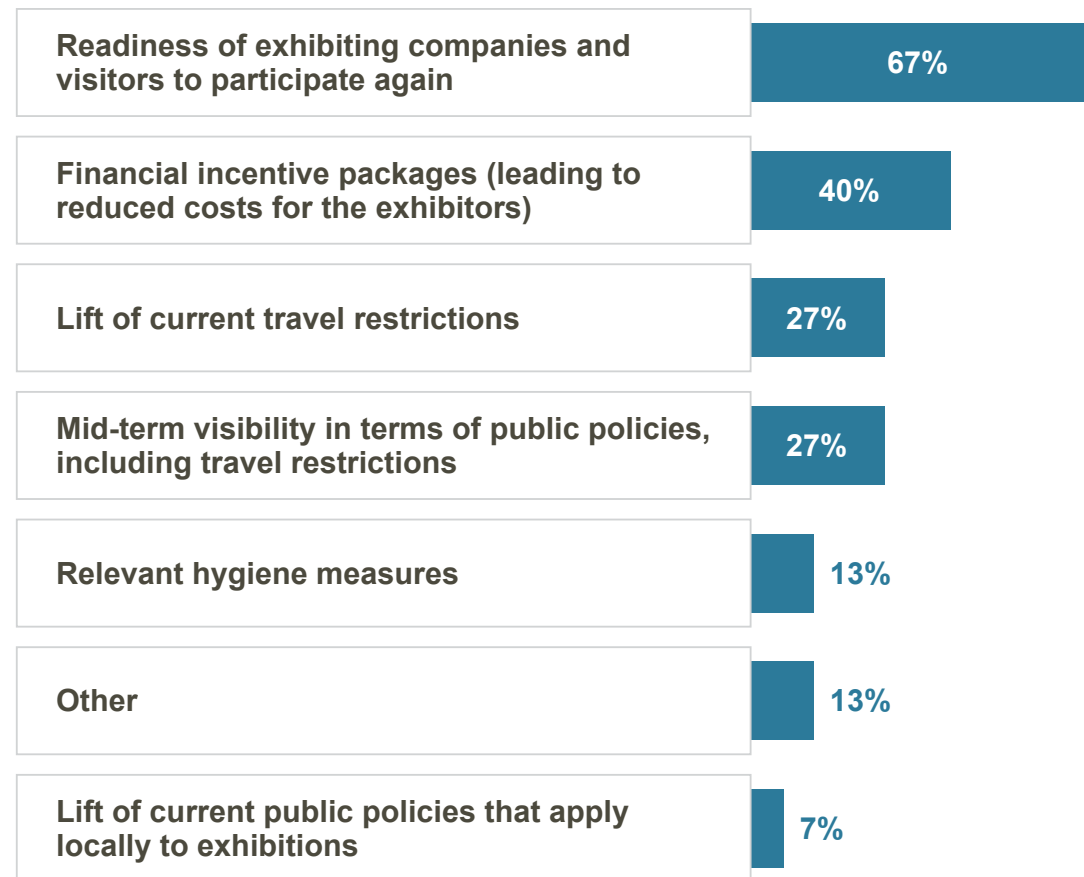




When do you believe exhibitions will open again in your city?



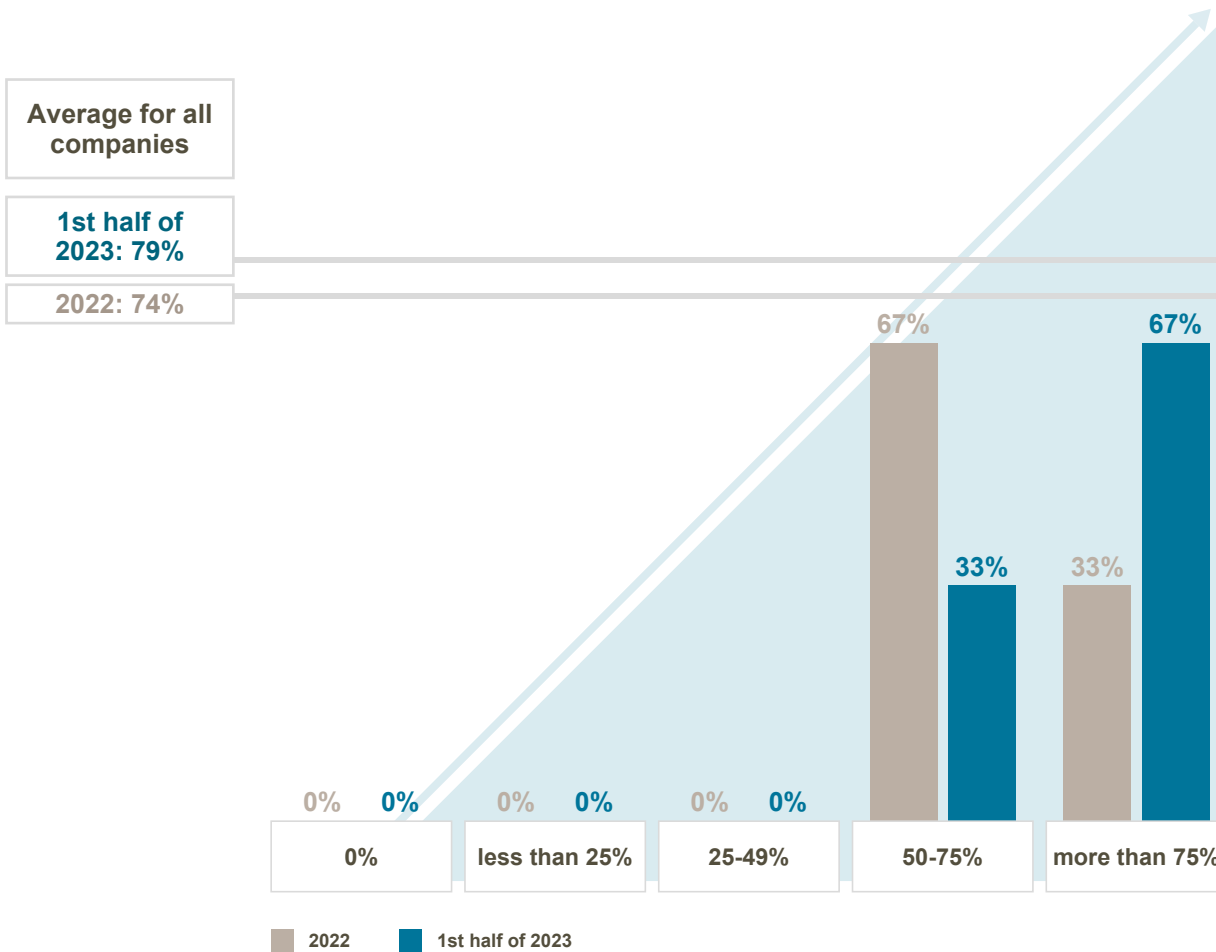
What do you believe would most help the “bounce back” of exhibitions?



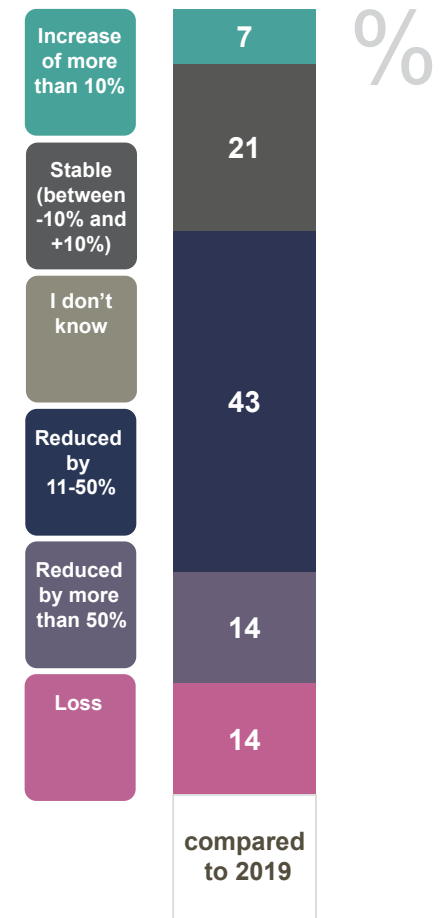
Detailed results for Australia

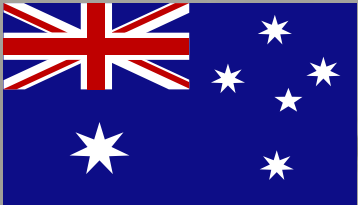


Revenue compared to 2019

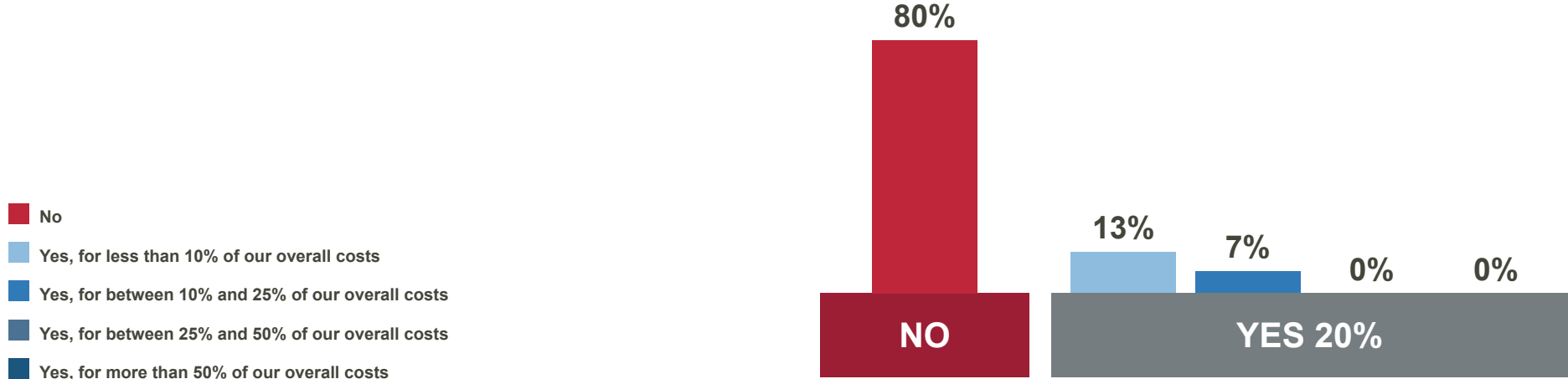


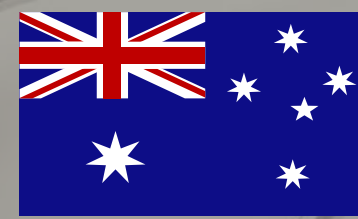
Operating Profits 2021





Did your company benefit from public financial support?

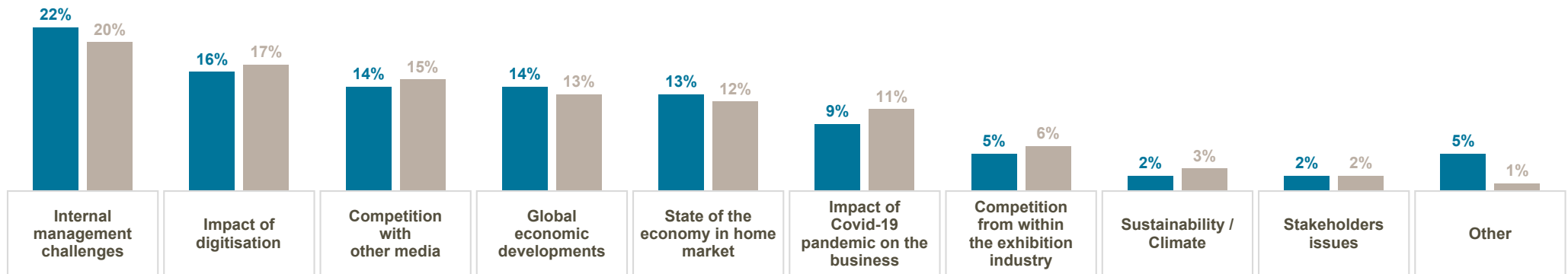




Most important business issues in the exhibition industry

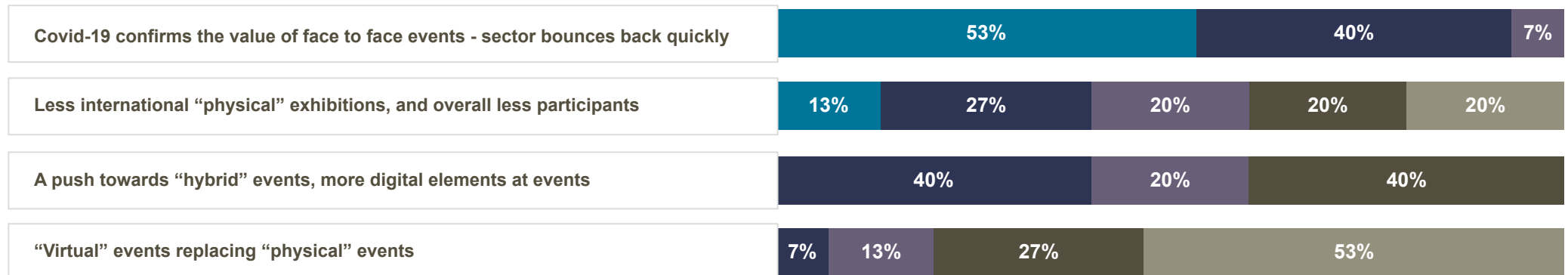
Australia

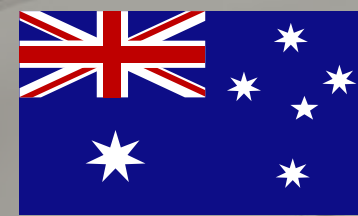
Global



Format of exhibitions in the coming years

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

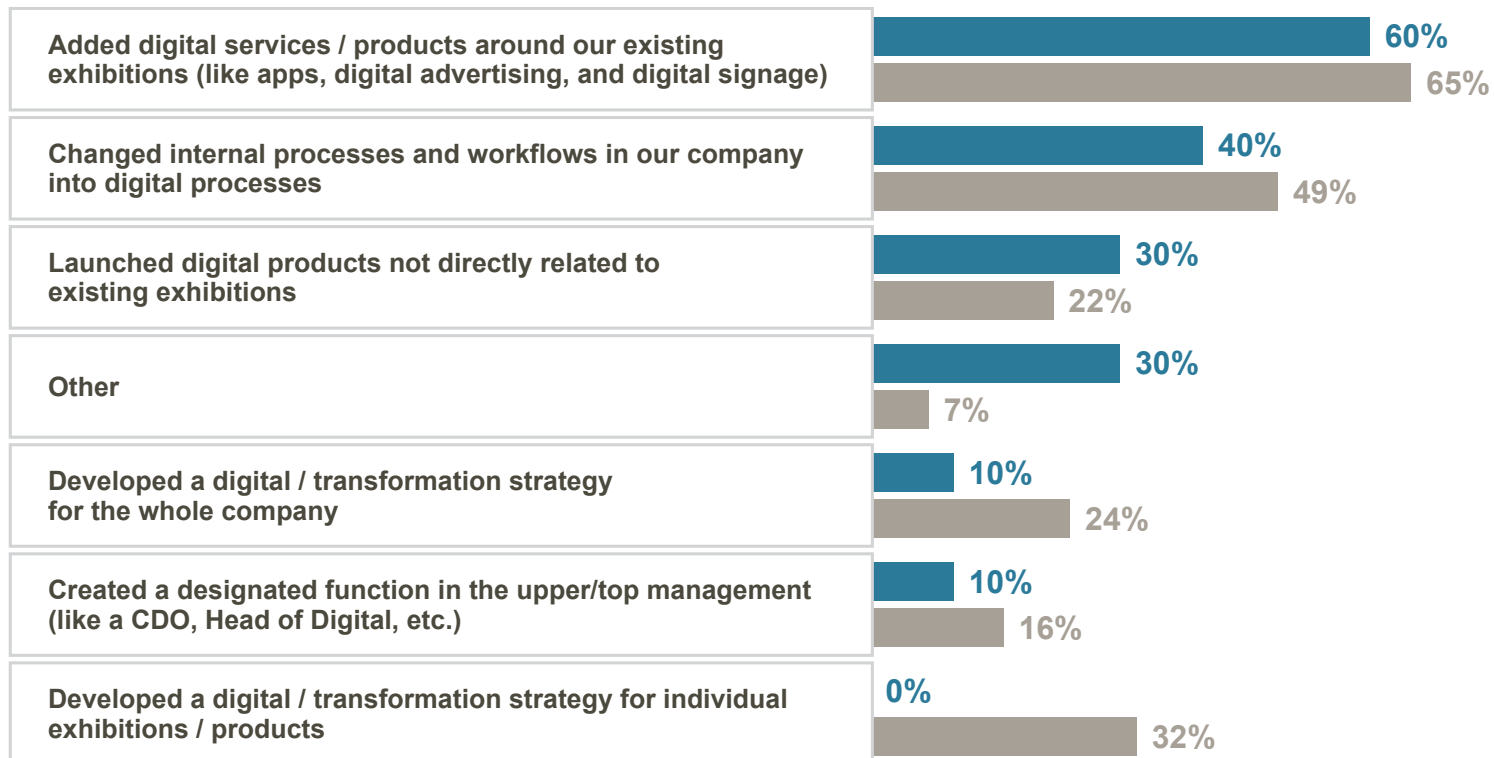


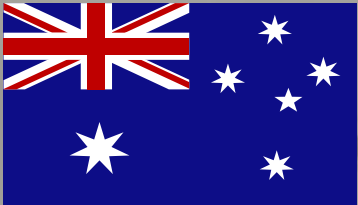


Digitisation: implementation in Australia and globally

Australia

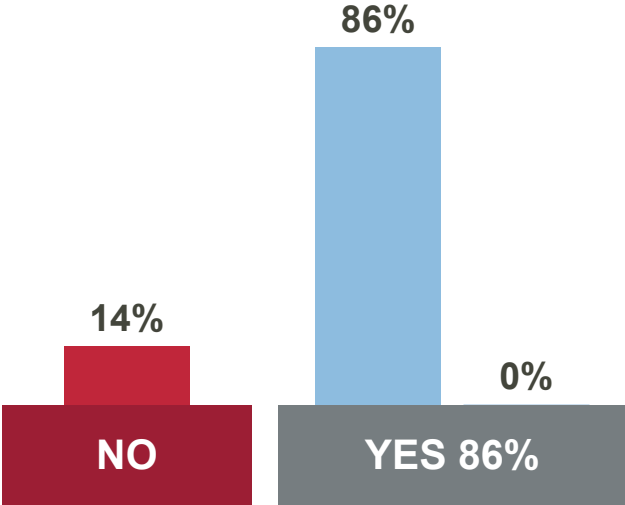
Global





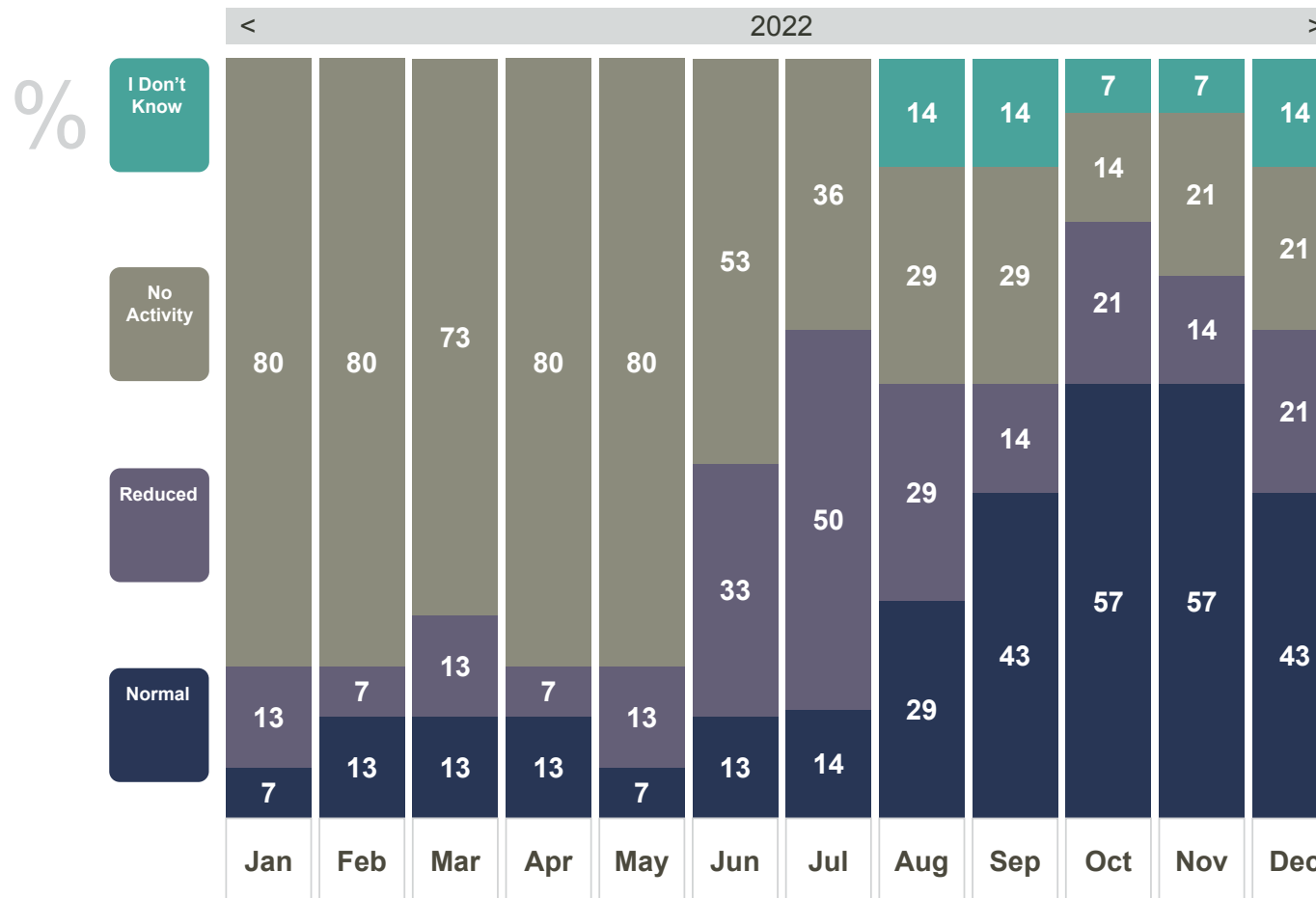
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



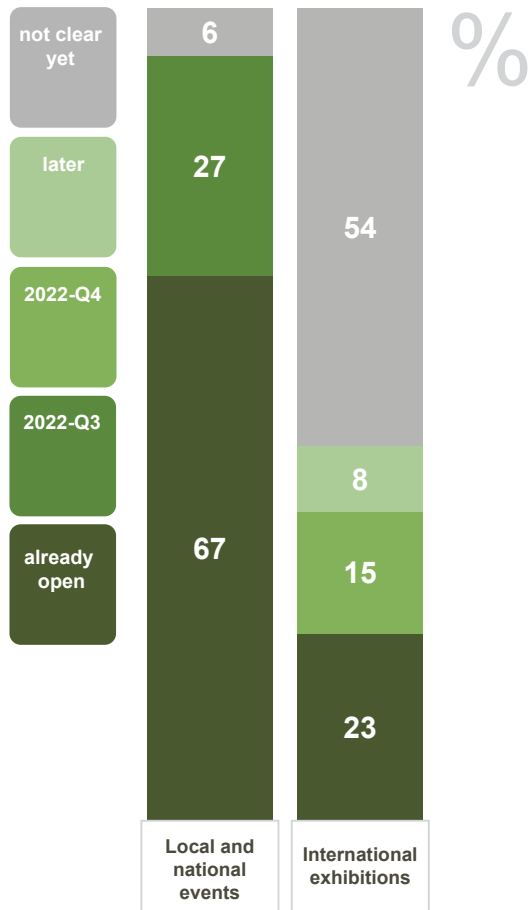


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

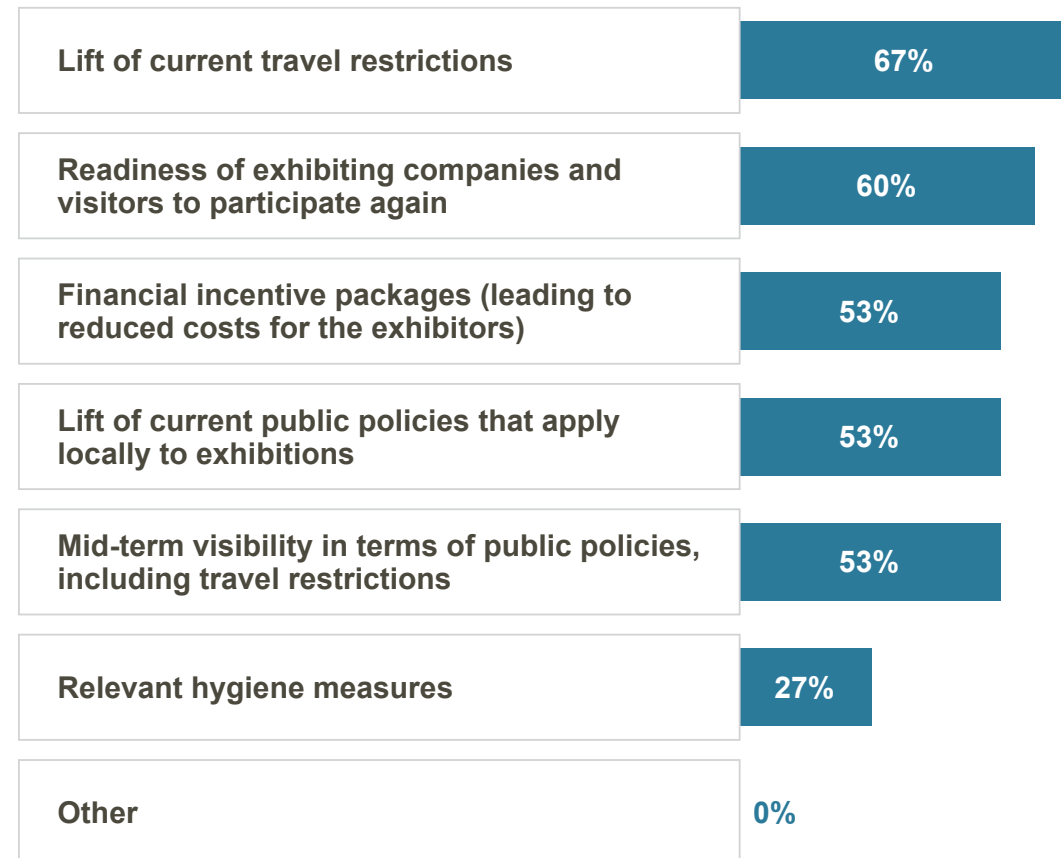




When do you believe exhibitions will open again in your city?

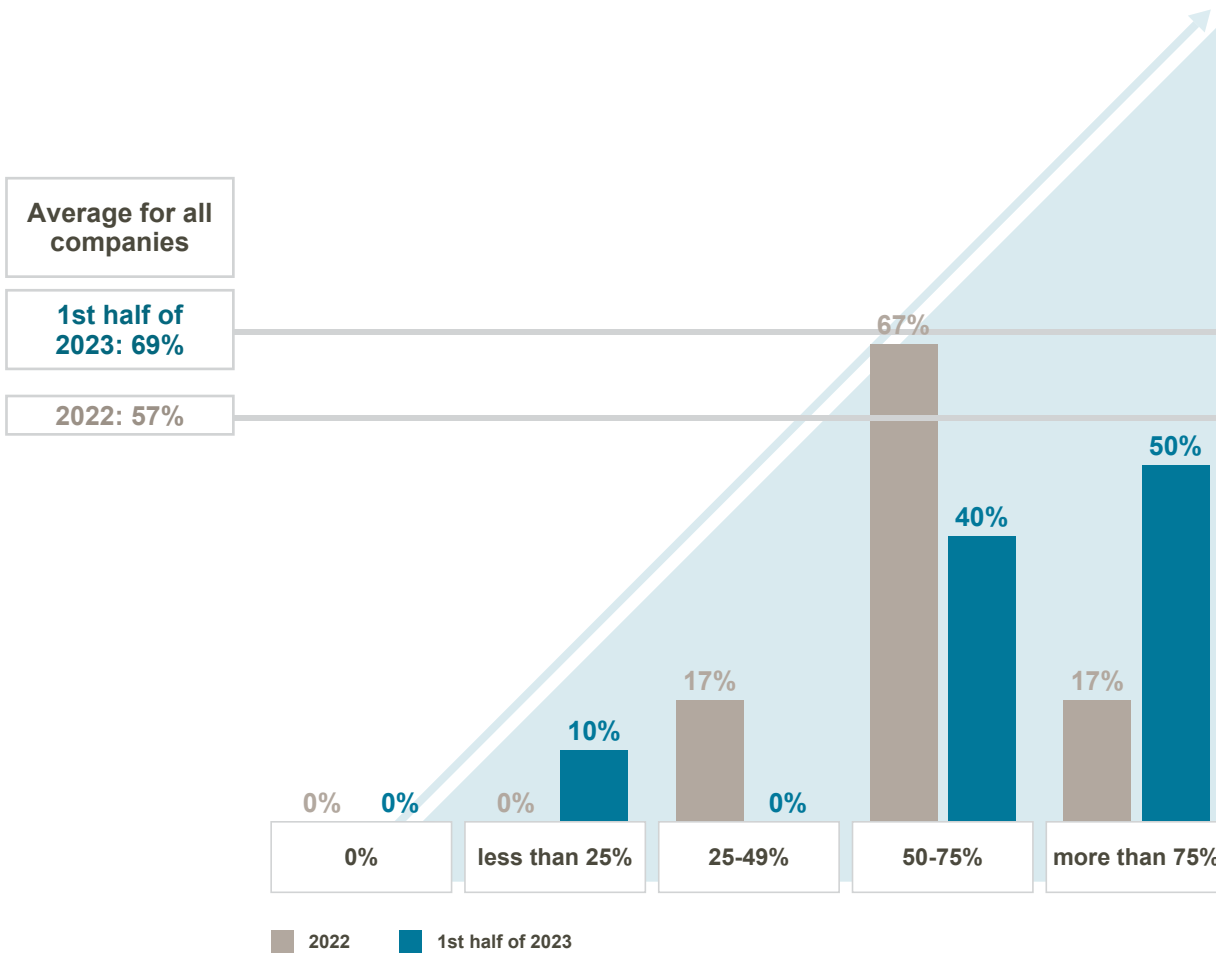


What do you believe would most help the “bounce back” of exhibitions?

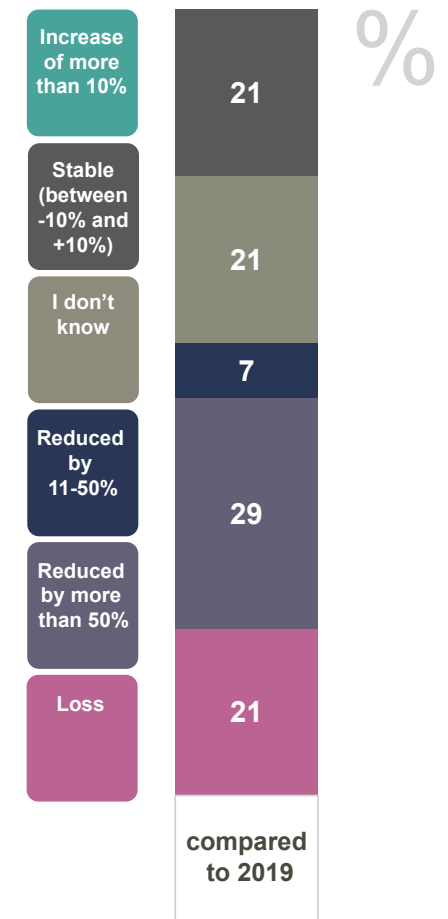




Revenue compared to 2019



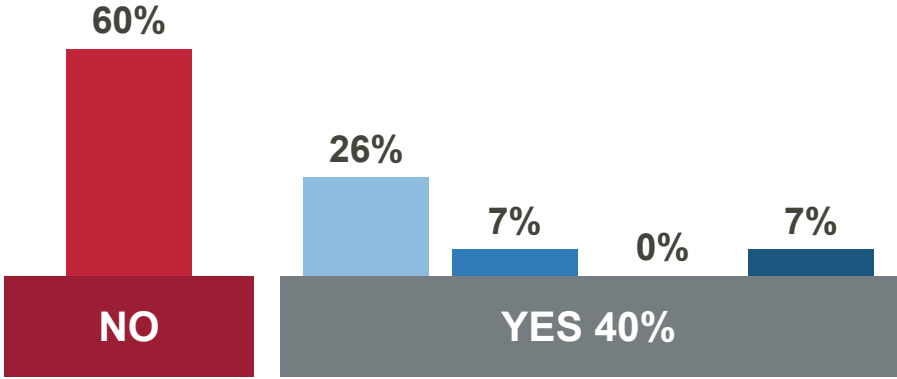
Operating Profits 2021





Did your company benefit from public financial support?

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

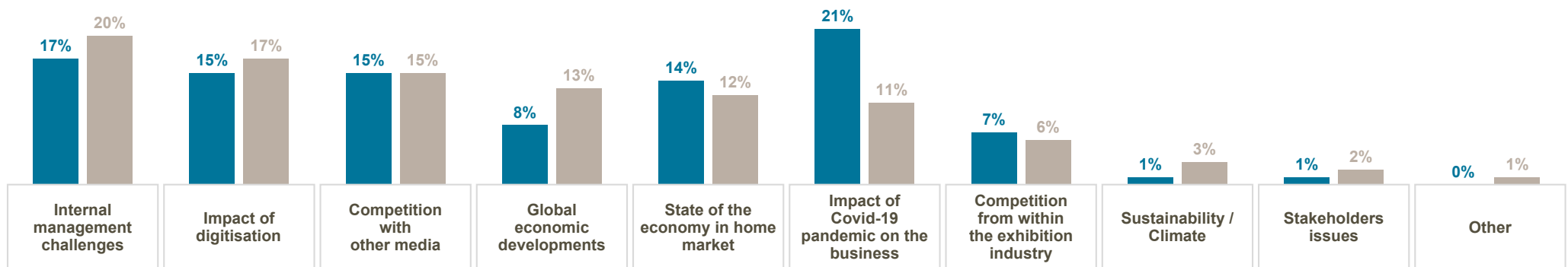




Most important business issues in the exhibition industry

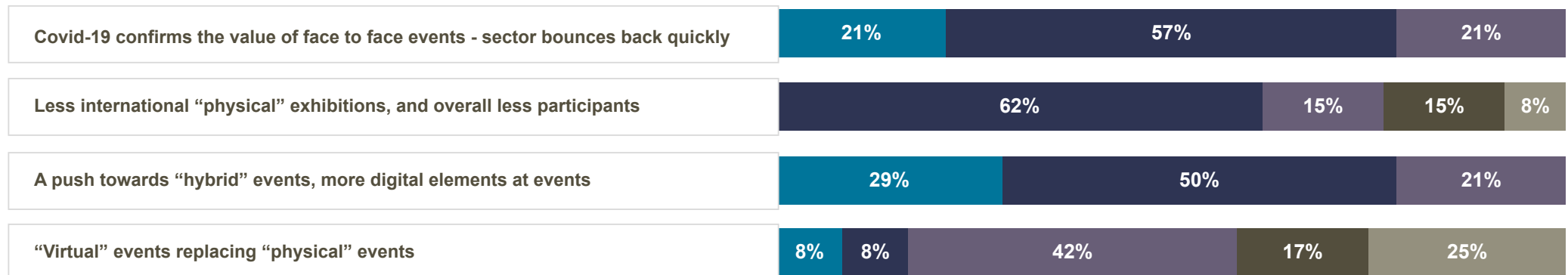
China

Global



Format of exhibitions in the coming years

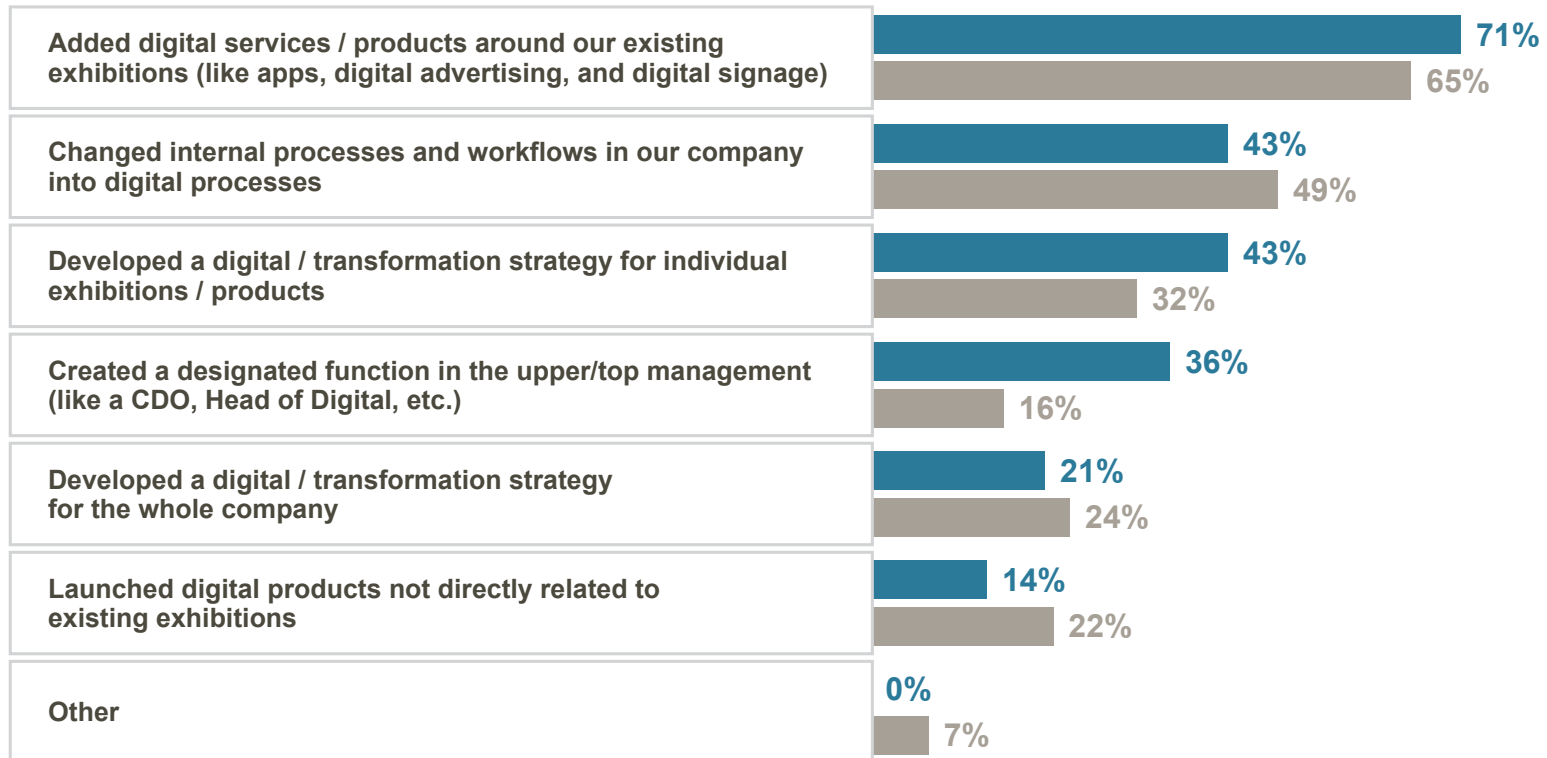
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not





Digitisation: implementation in China and globally

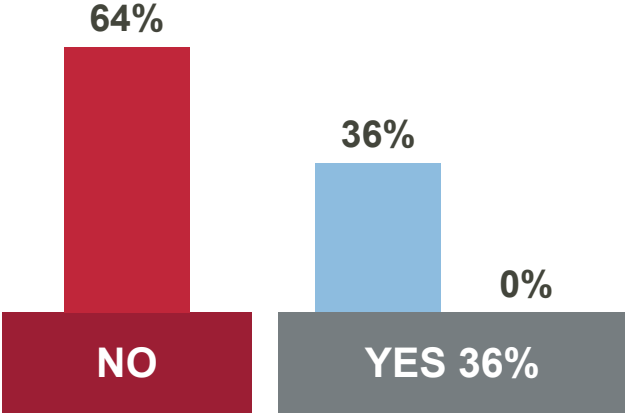
China
Global

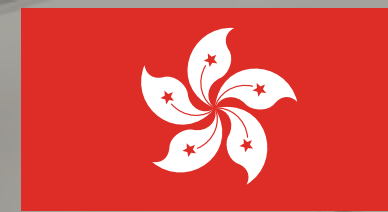




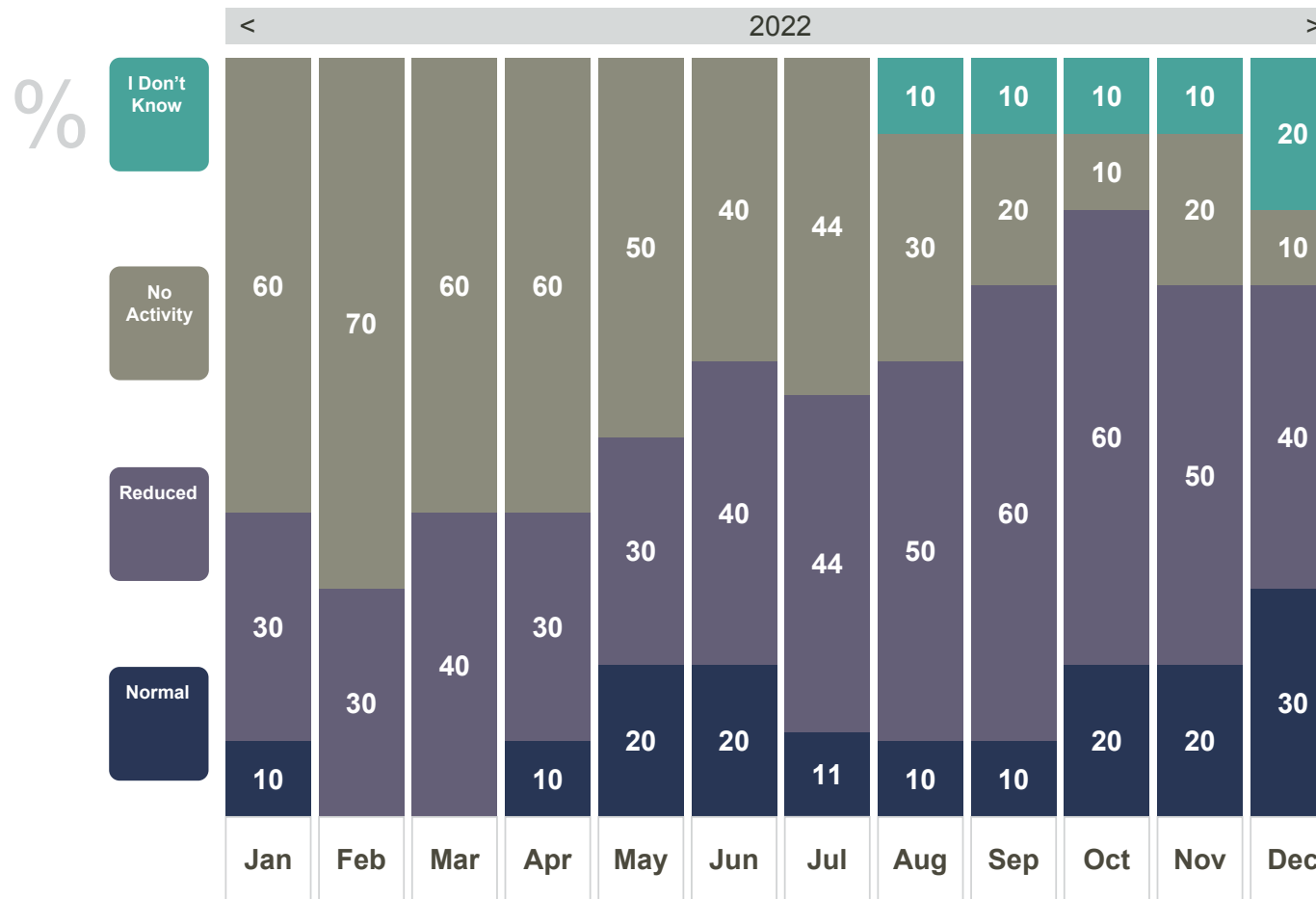
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

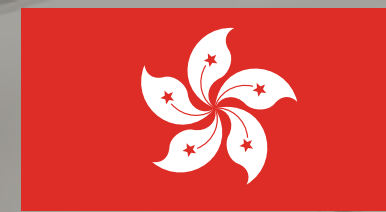
- No
- Yes, and it proves difficult to find the right people
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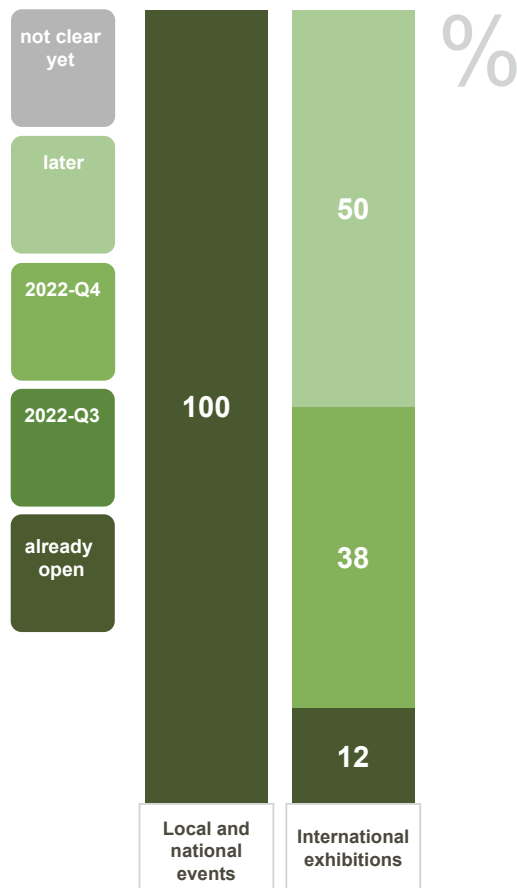


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

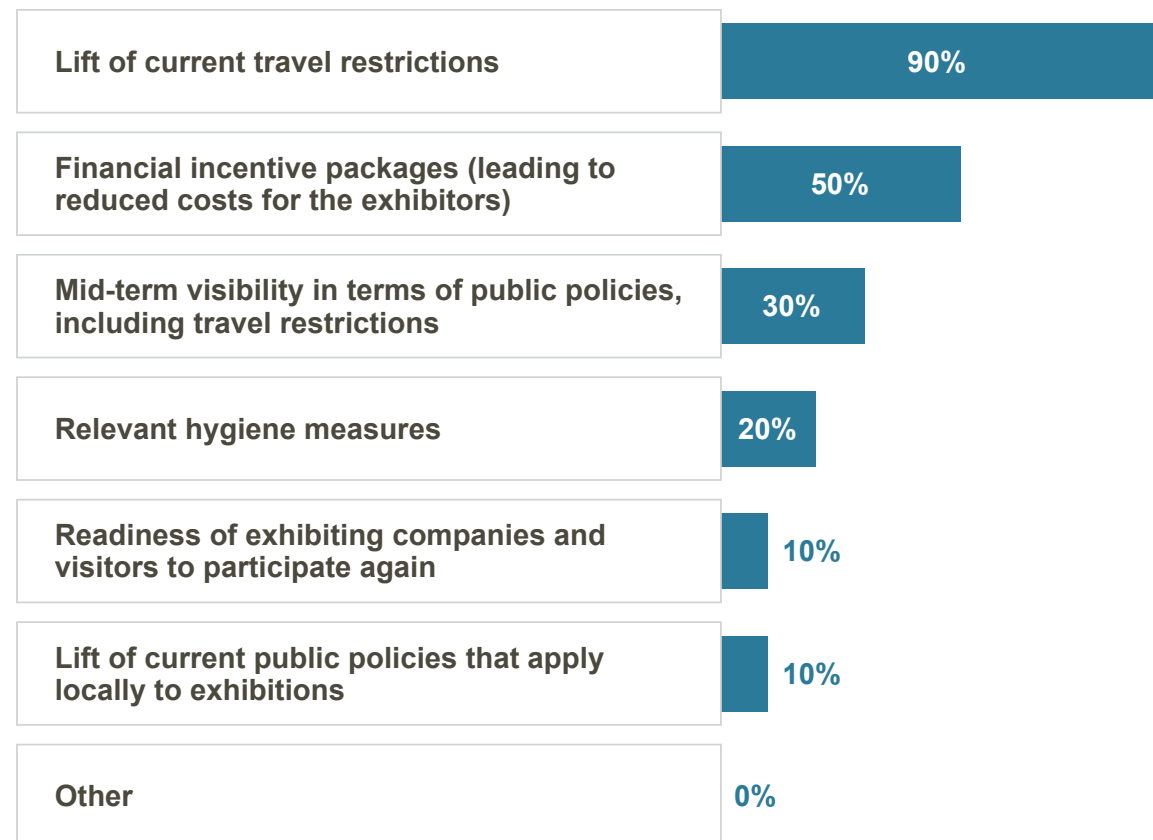


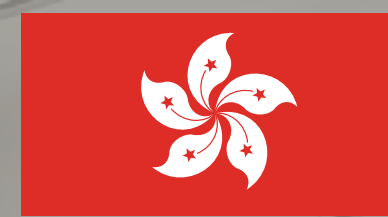


When do you believe exhibitions will open again in your city?

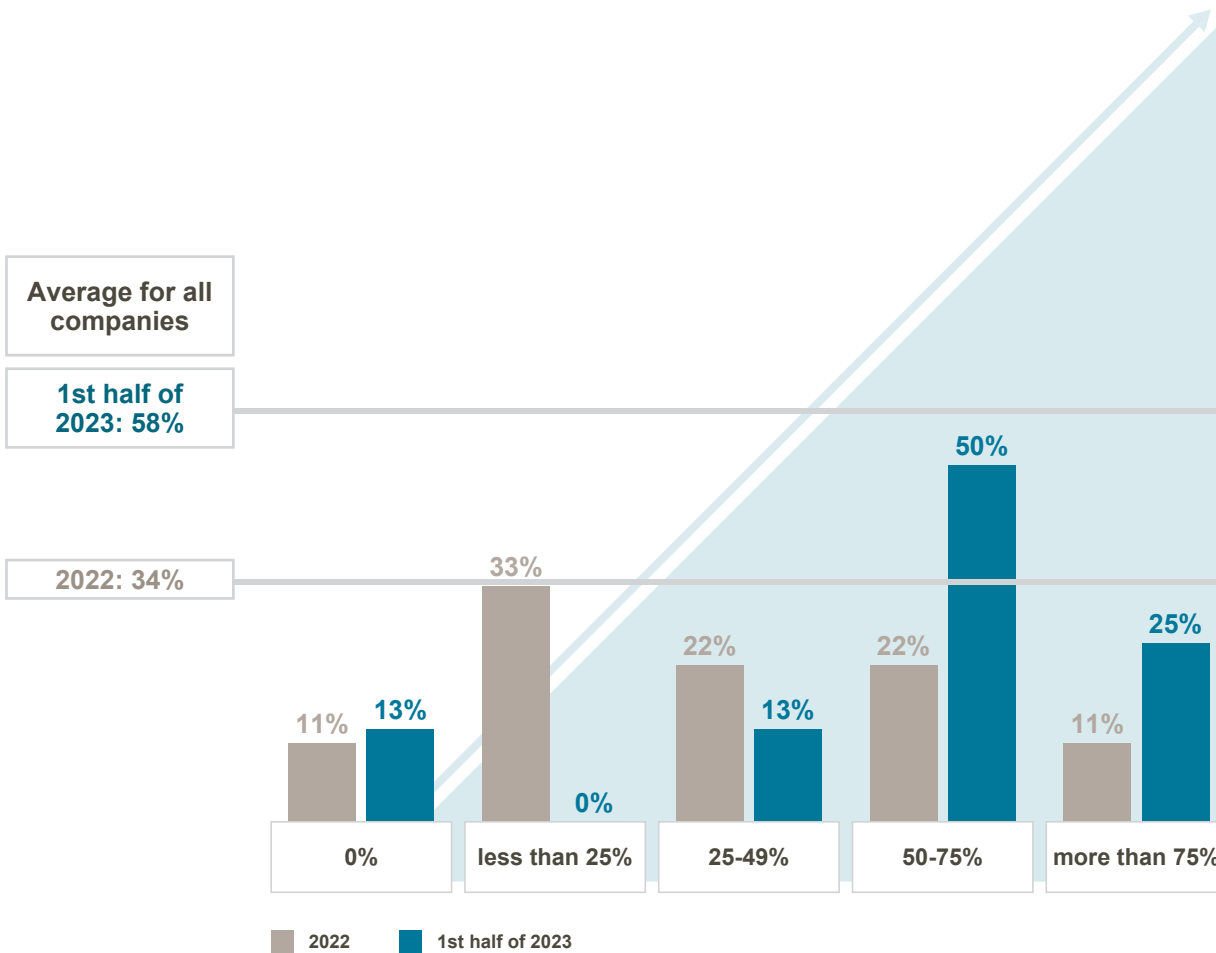


What do you believe would most help the “bounce back” of exhibitions?

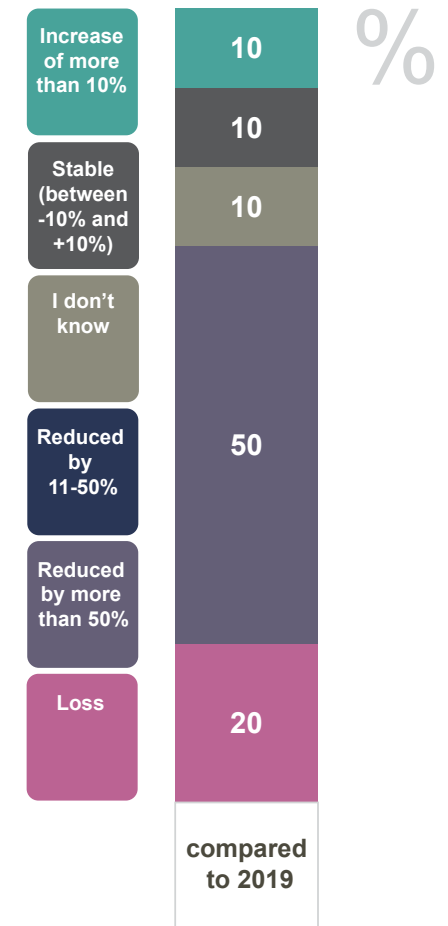


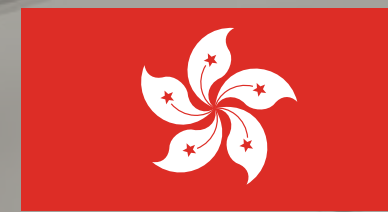


Revenue compared to 2019



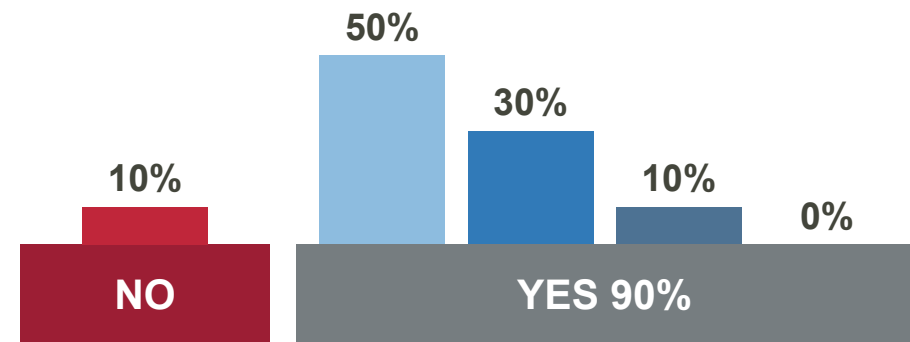
Operating Profits 2021

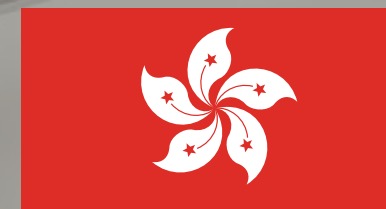




Did your company benefit from public financial support?

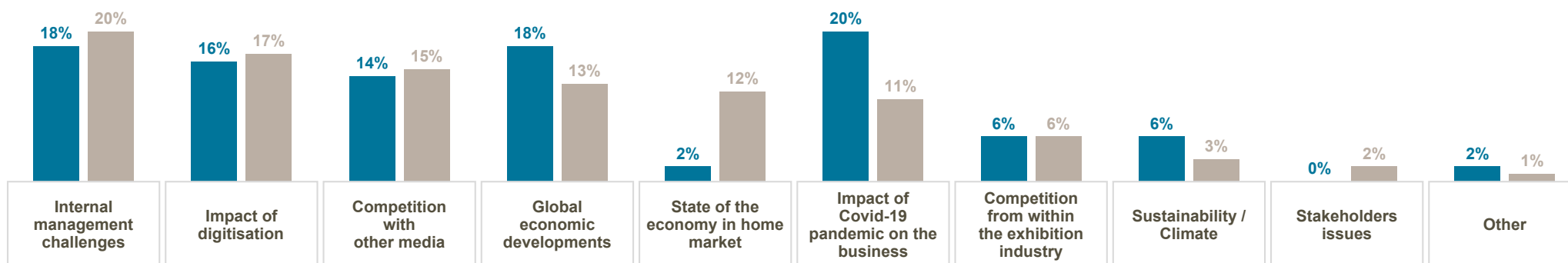
- No
- Yes, for less than 10% of our overall costs
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- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





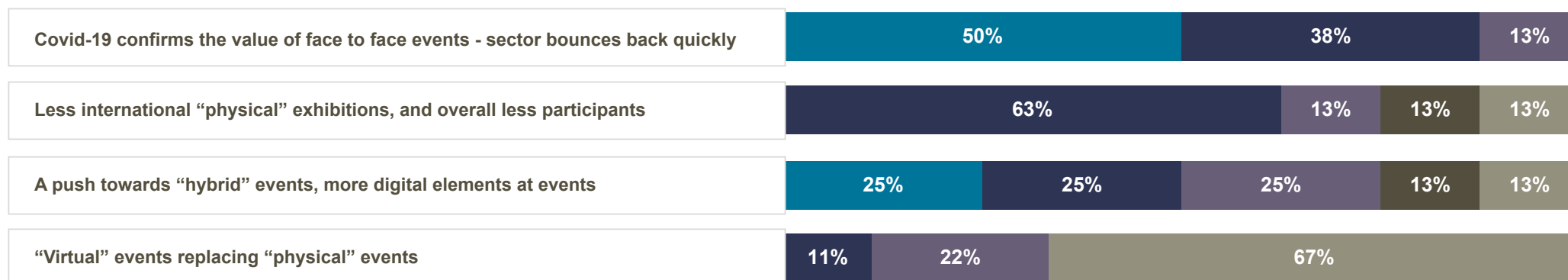
Most important business issues in the exhibition industry

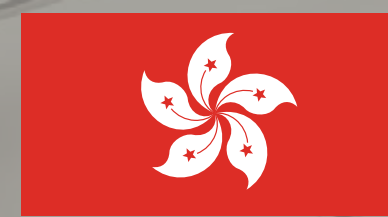
Hong Kong Global



Format of exhibitions in the coming years

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

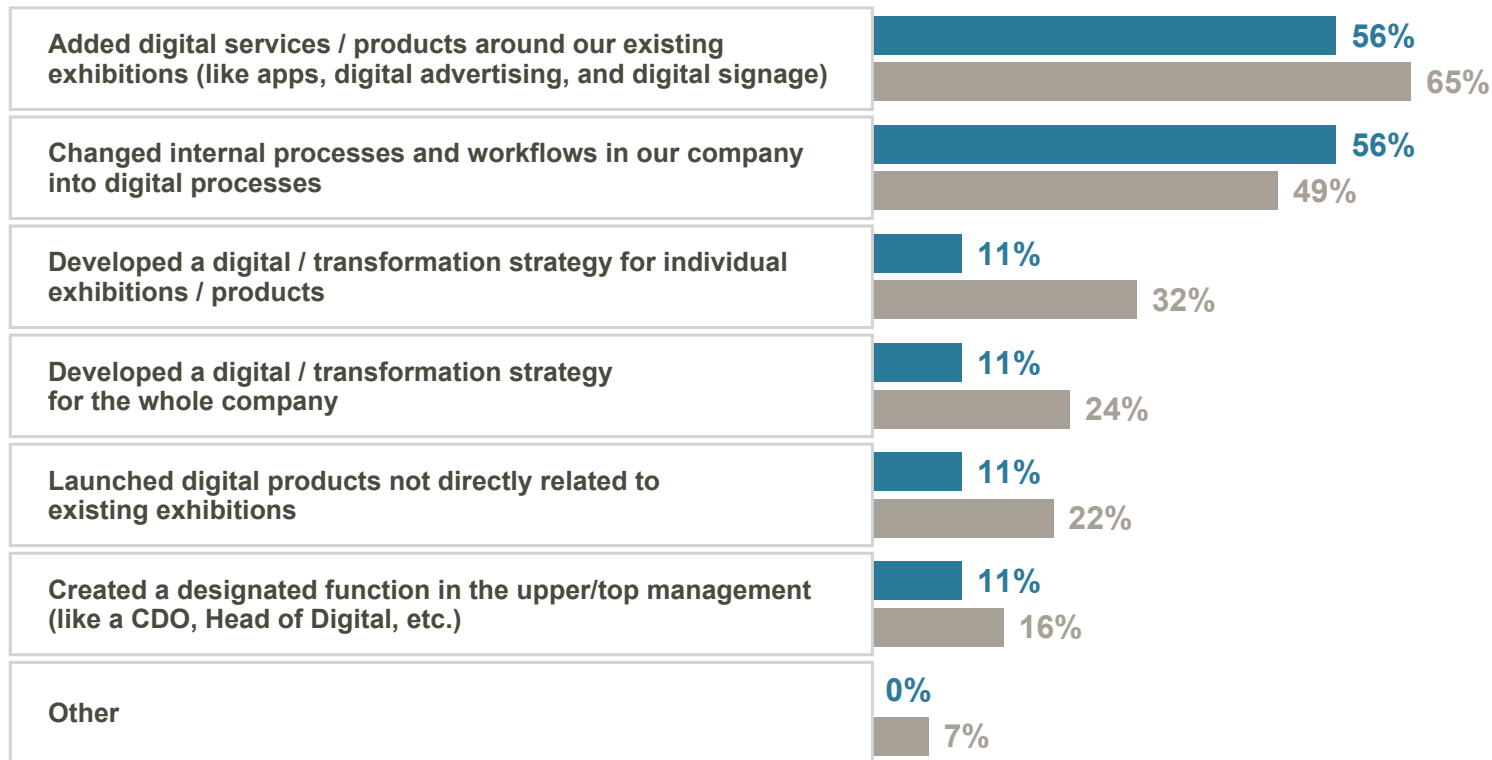


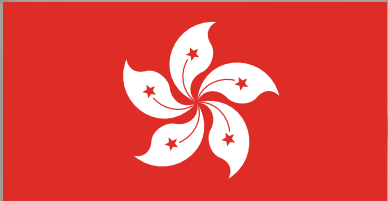


Digitisation: implementation in Hong Kong and globally

Hong Kong

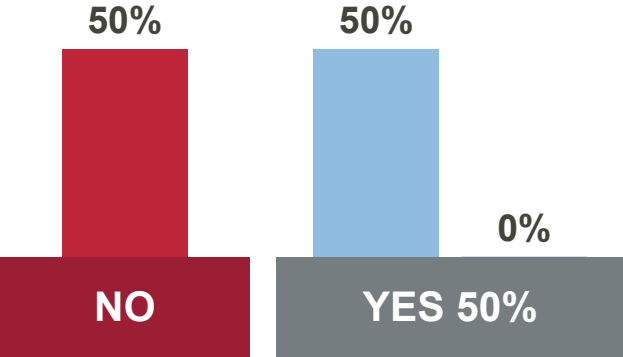
Global





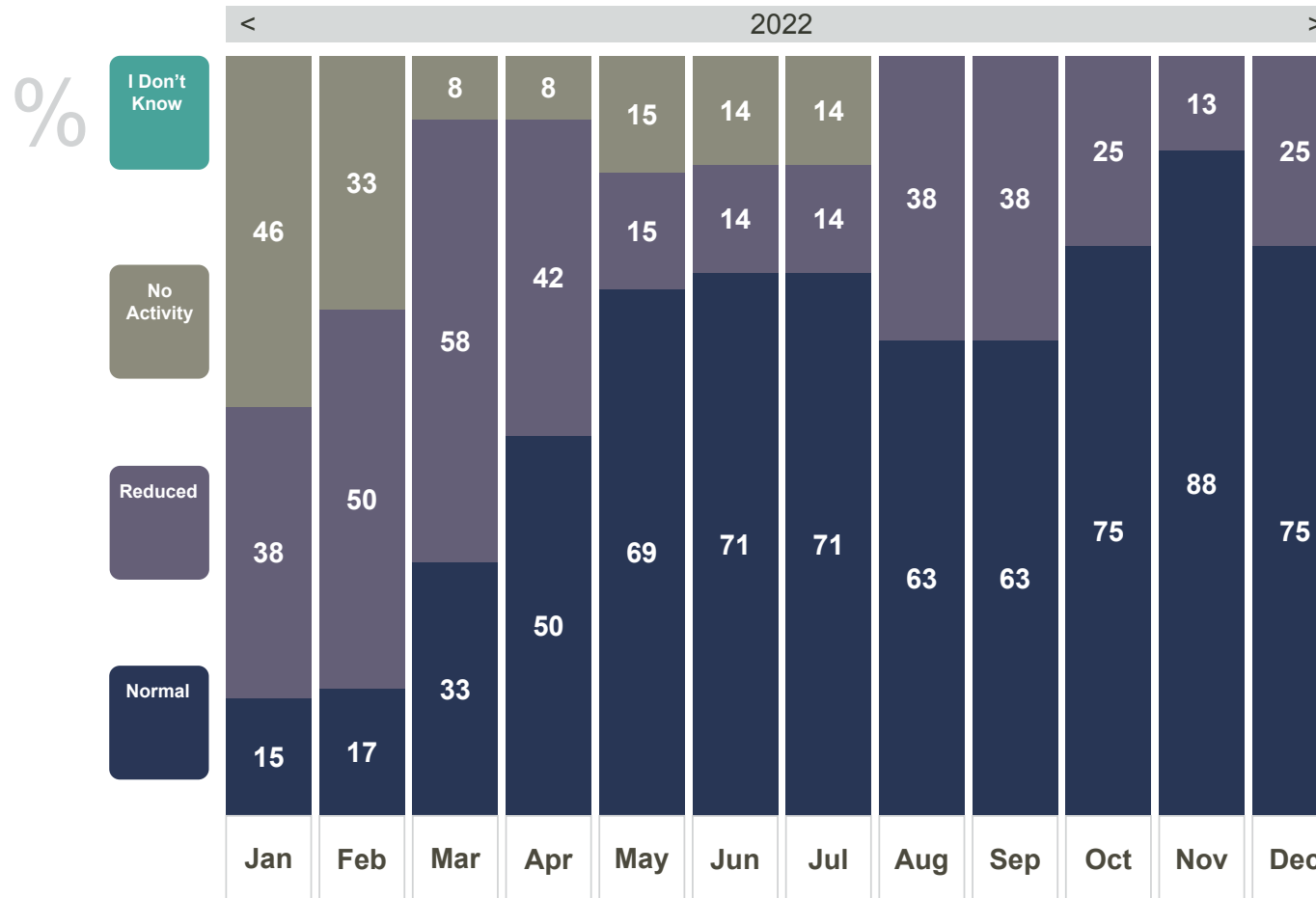
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



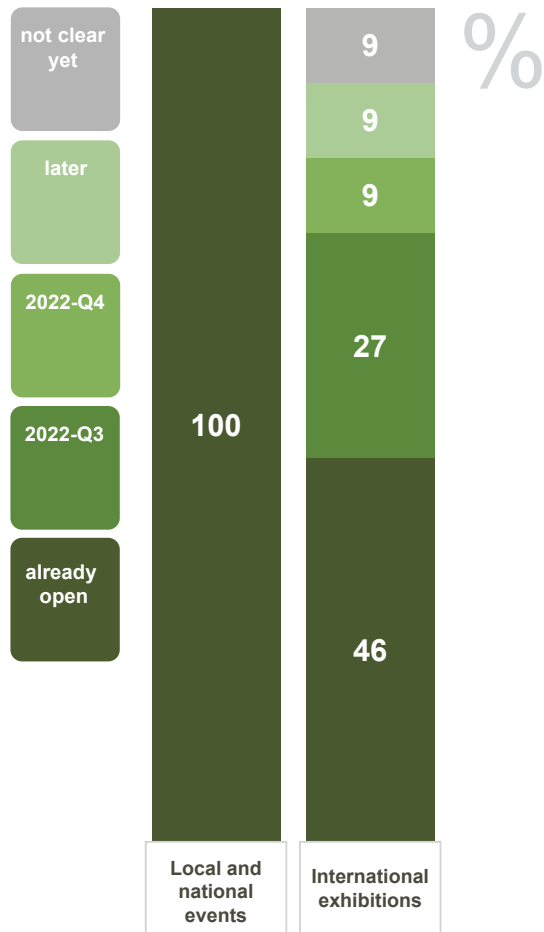


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

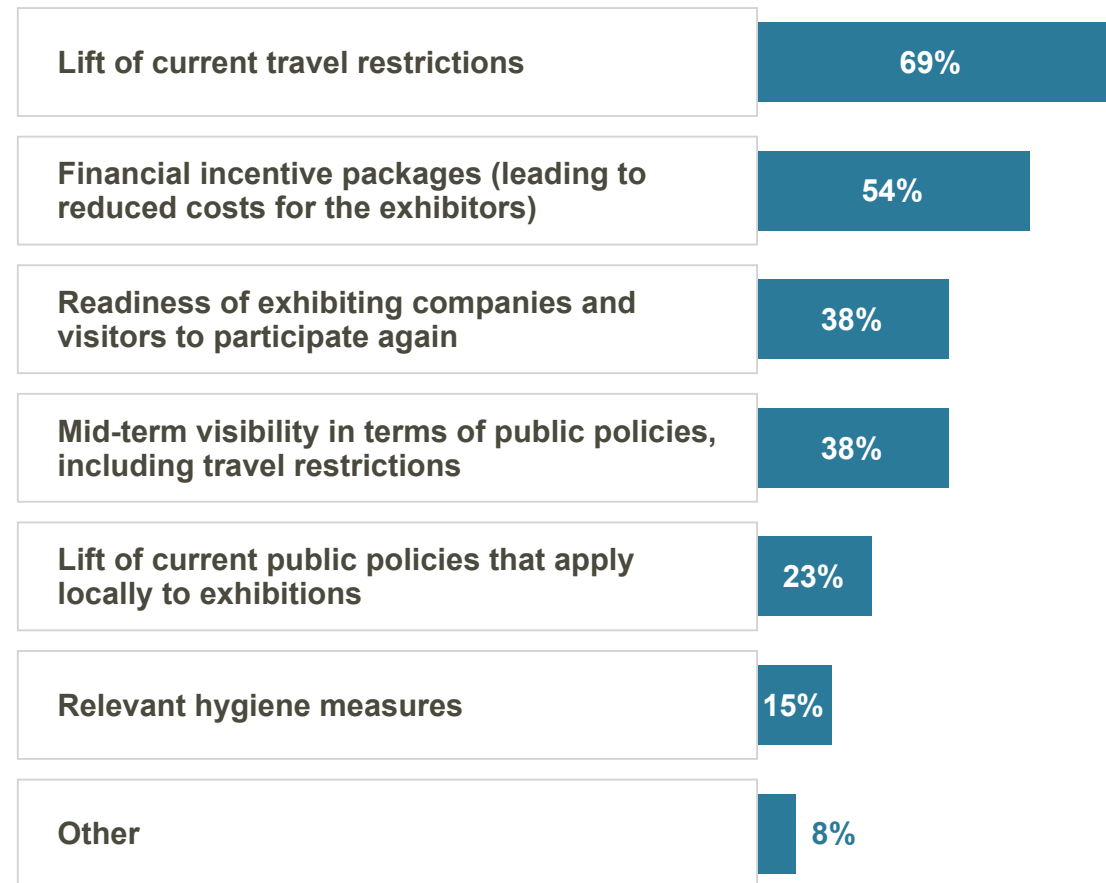




When do you believe exhibitions will open again in your city?

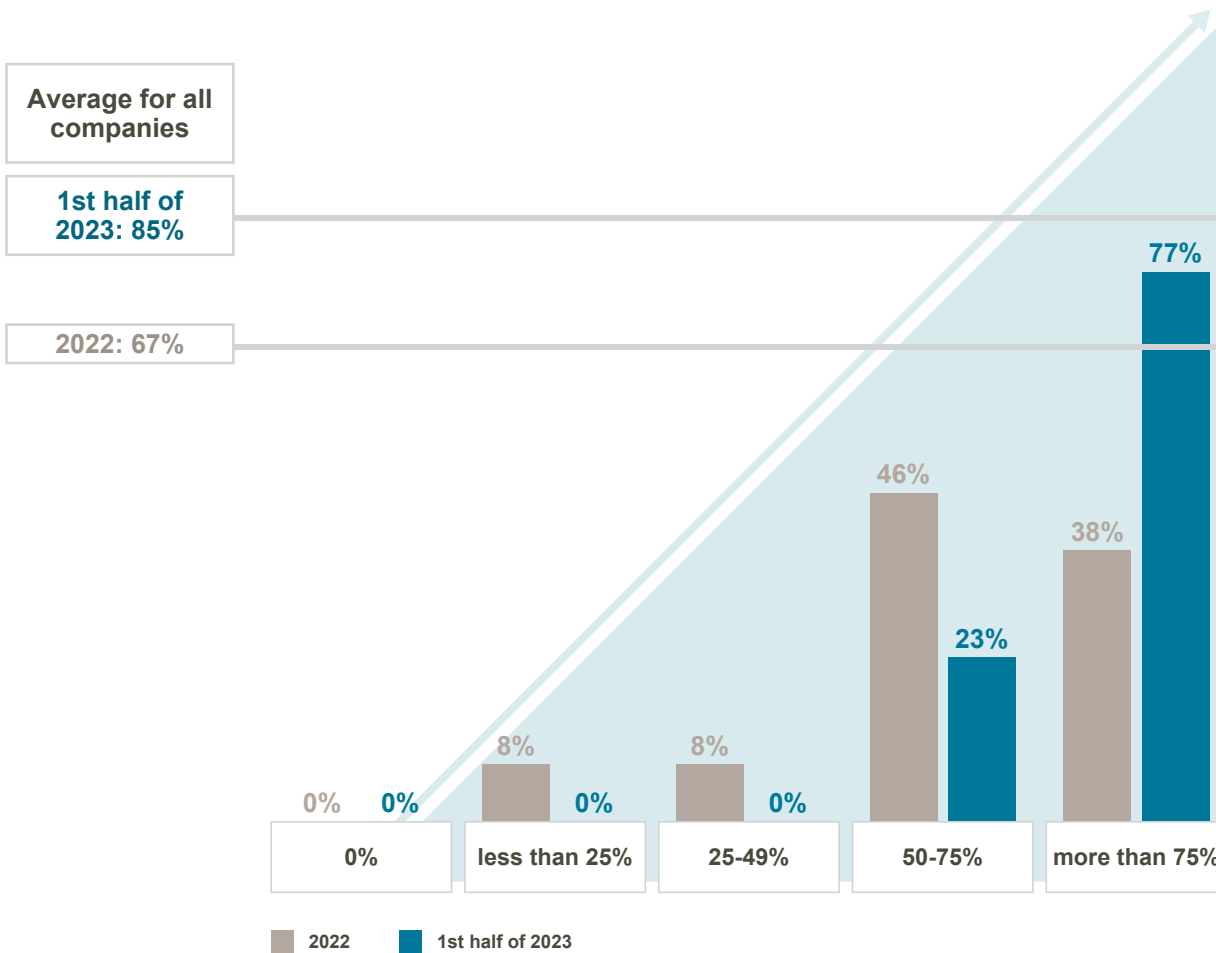


What do you believe would most help the “bounce back” of exhibitions?

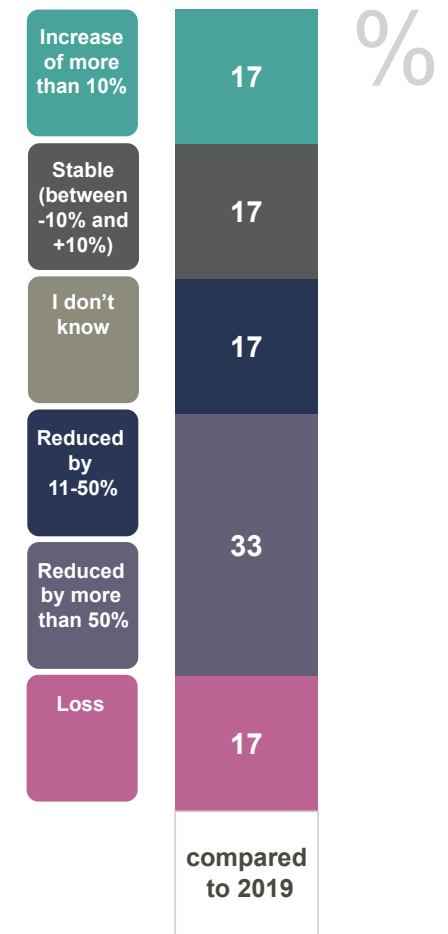




Revenue compared to 2019



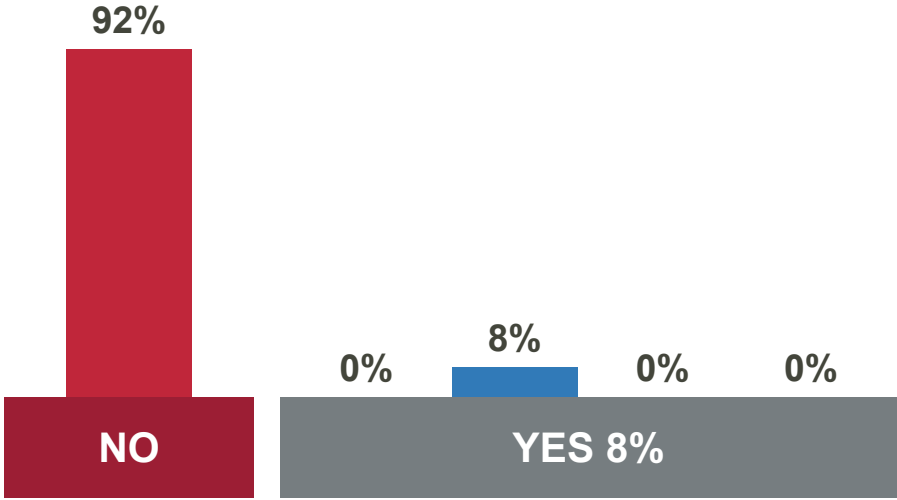
Operating Profits 2021





Did your company benefit from public financial support?

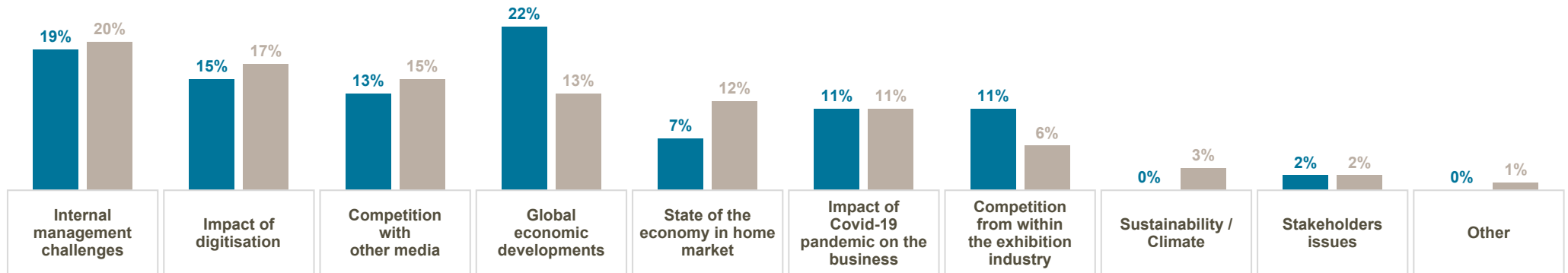
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





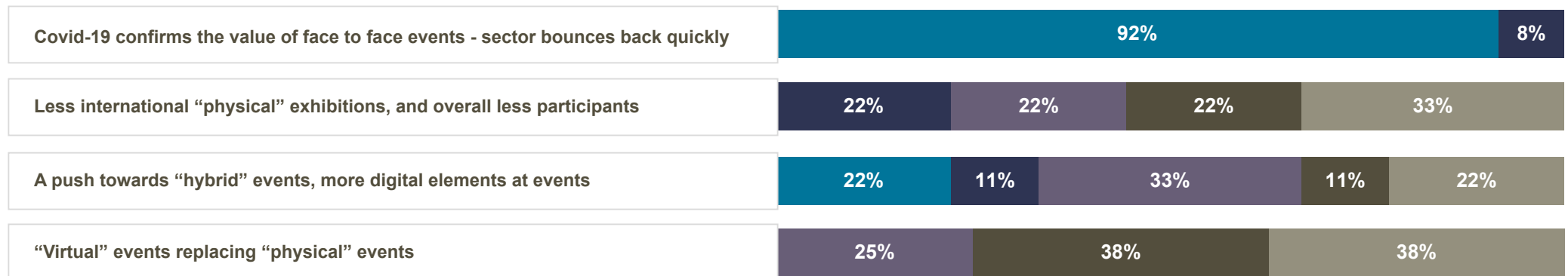
Most important business issues in the exhibition industry

India Global



Format of exhibitions in the coming years

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





Digitisation: implementation in India and globally

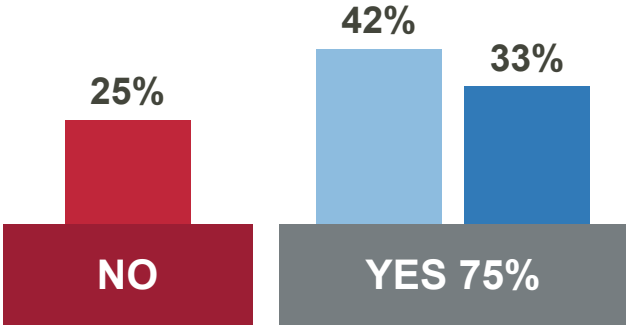
India Global

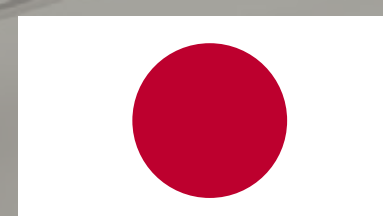




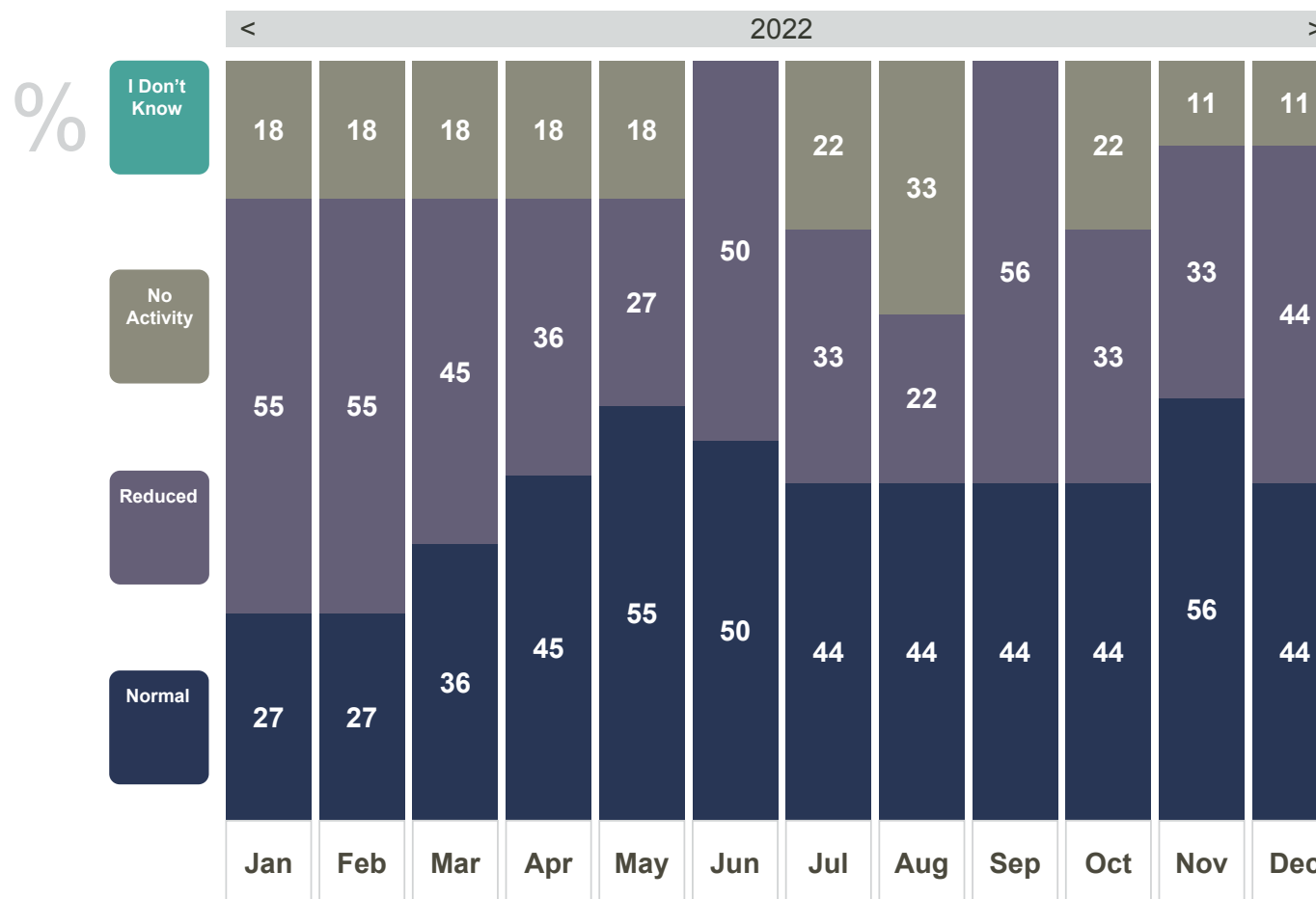
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

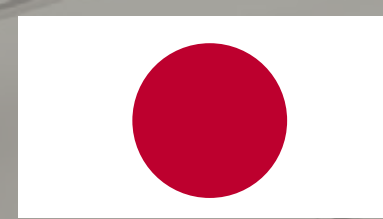
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



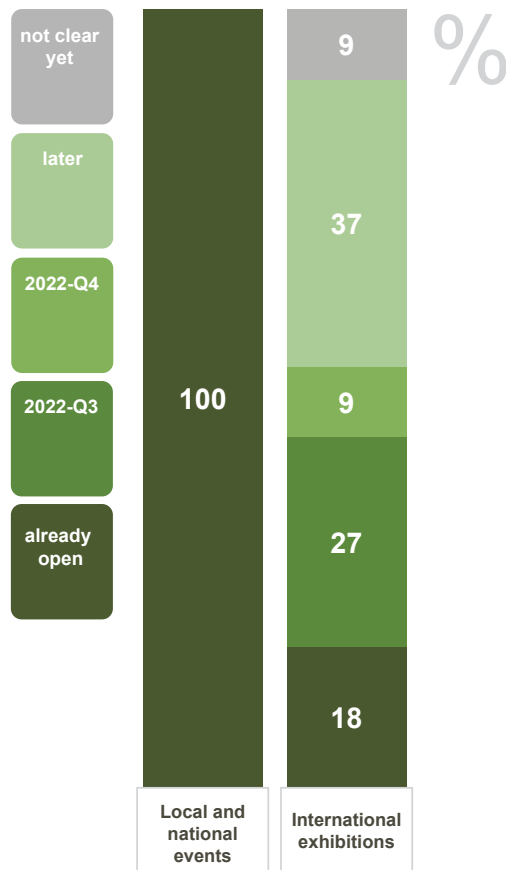


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

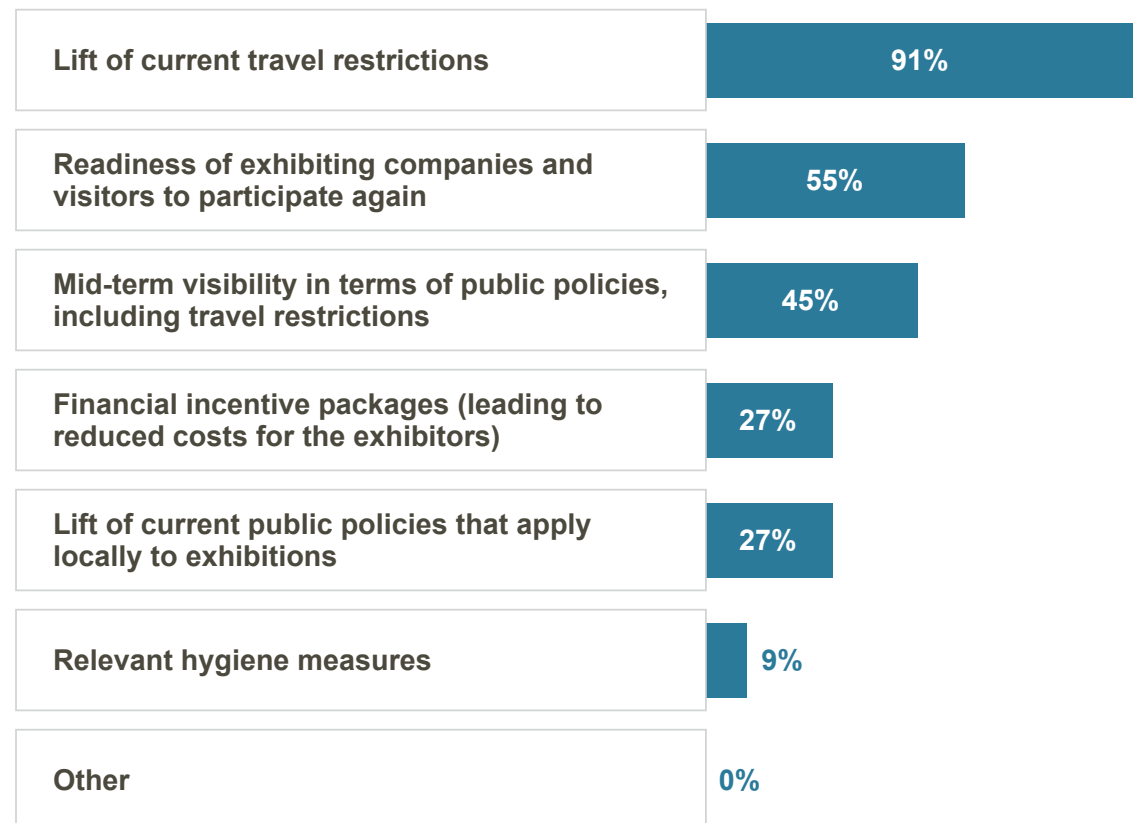




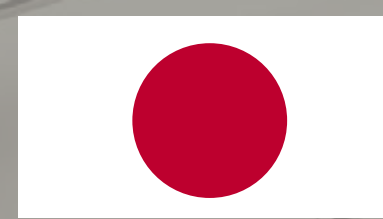
When do you believe exhibitions will open again in your city?



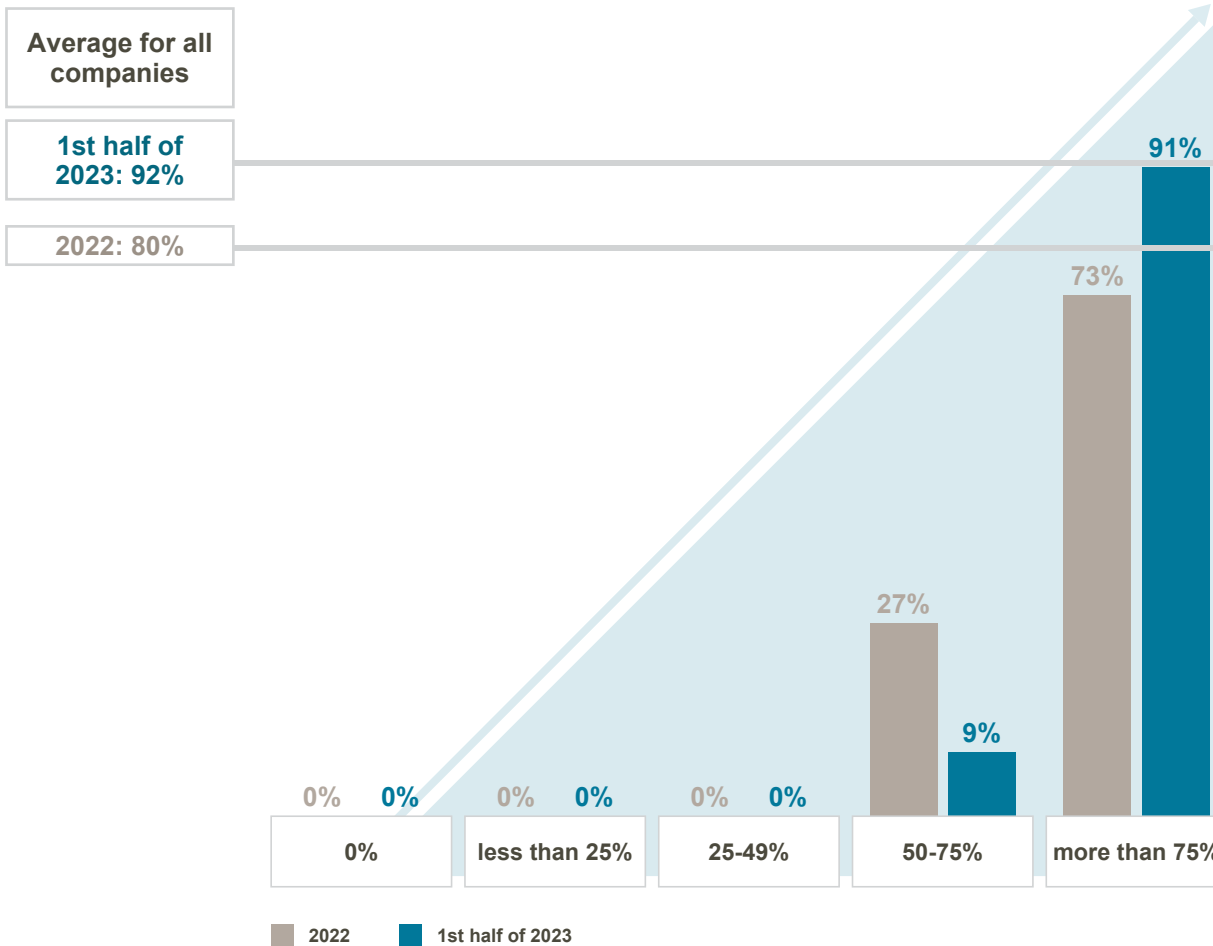
What do you believe would most help the “bounce back” of exhibitions?



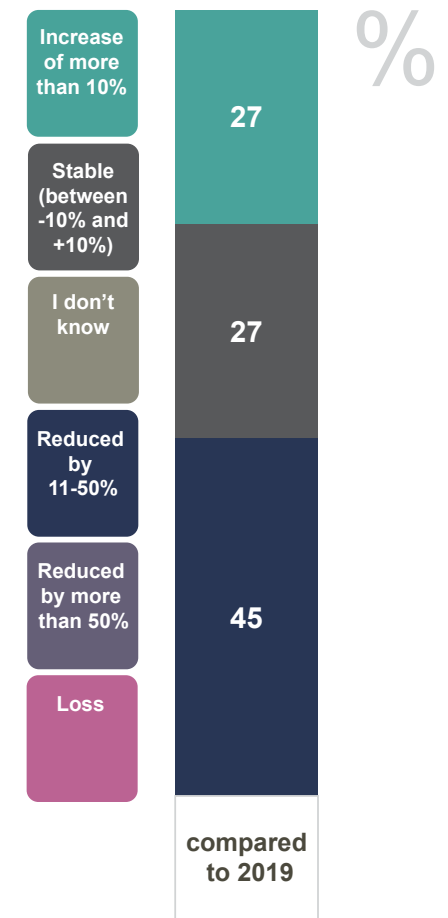
Detailed results for Japan

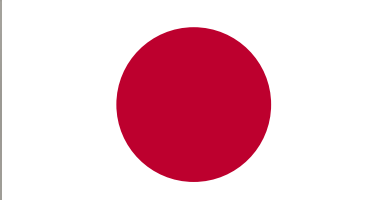


Revenue compared to 2019



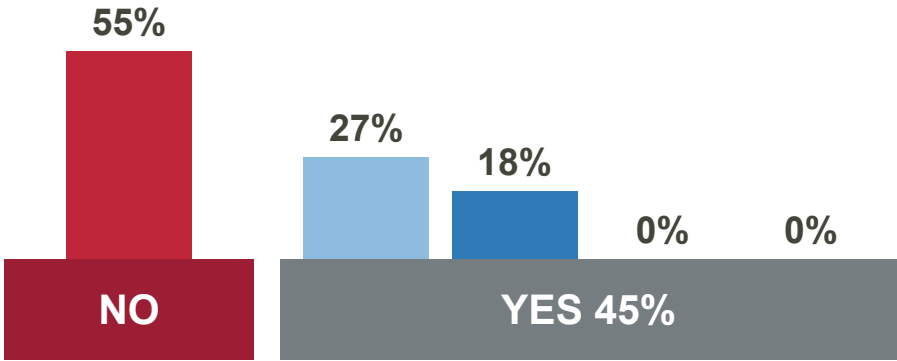
Operating Profits 2021

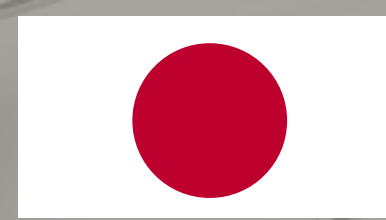




Did your company benefit from public financial support?

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

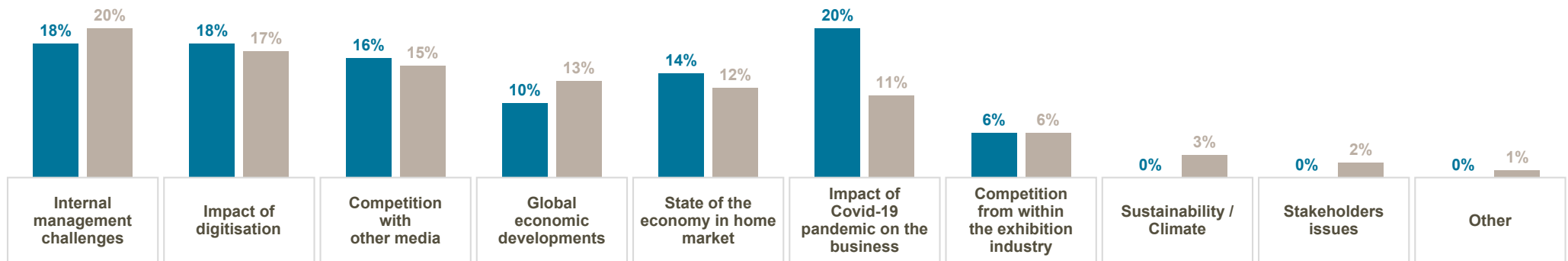




Most important business issues in the exhibition industry

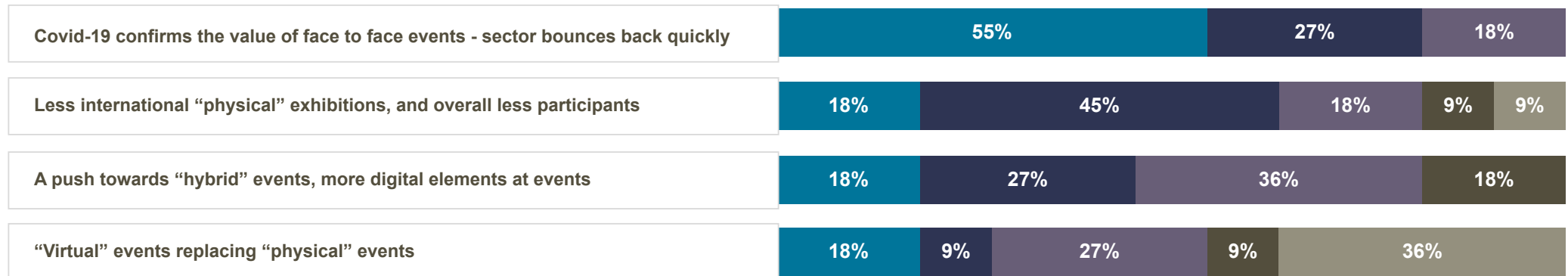
Japan

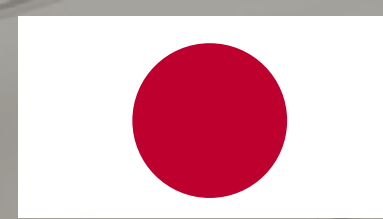
Global



Format of exhibitions in the coming years

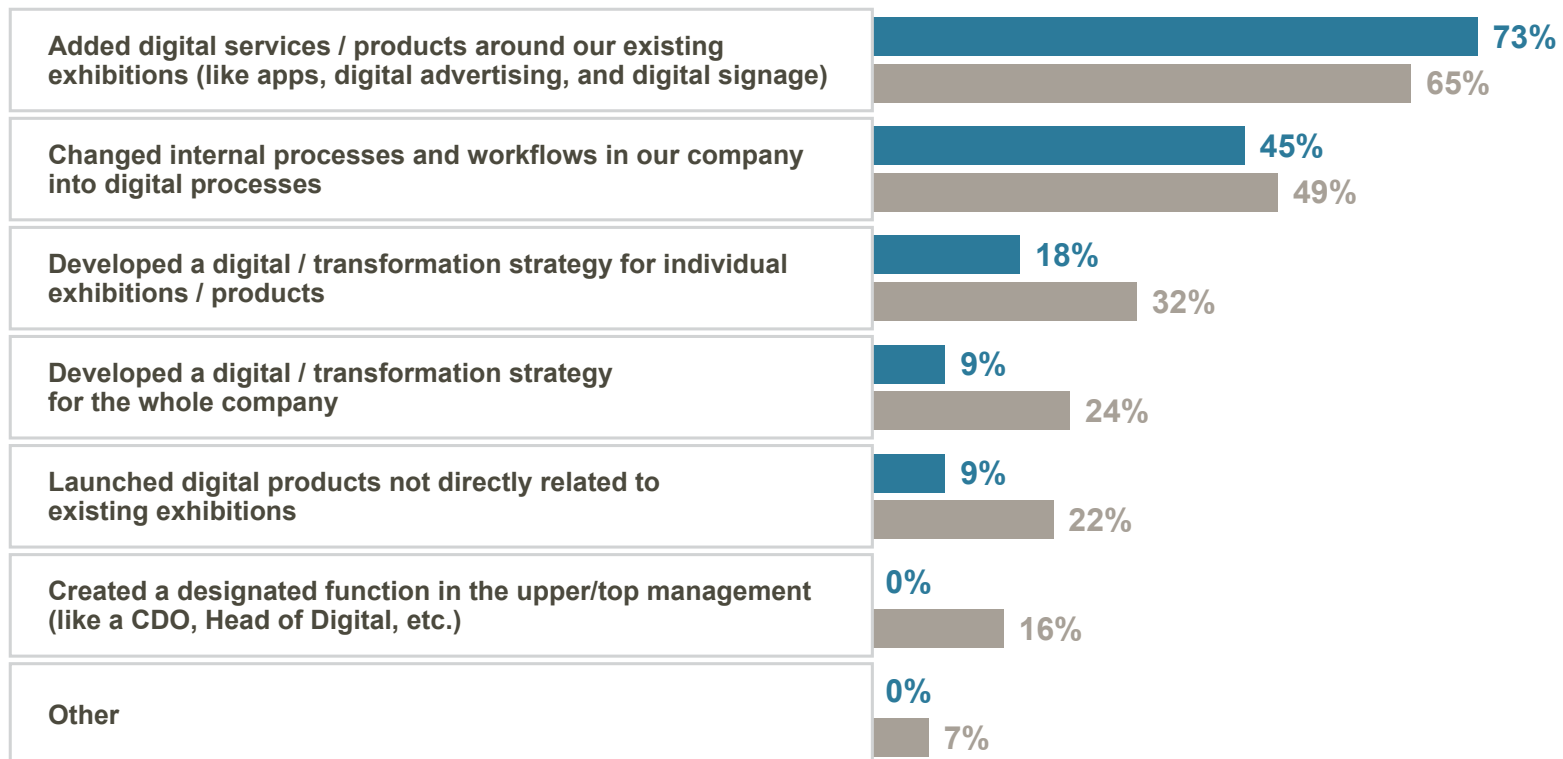
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not

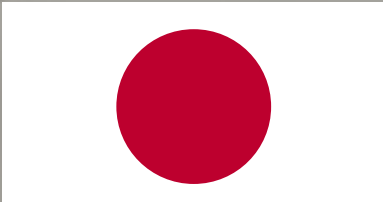




Digitisation: implementation in Japan and globally

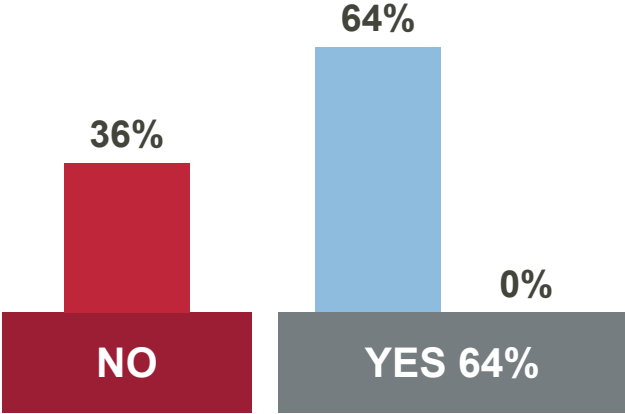
Japan
Global

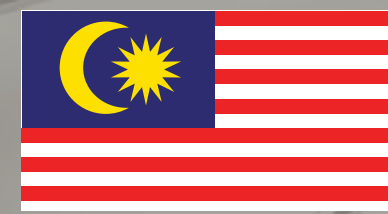




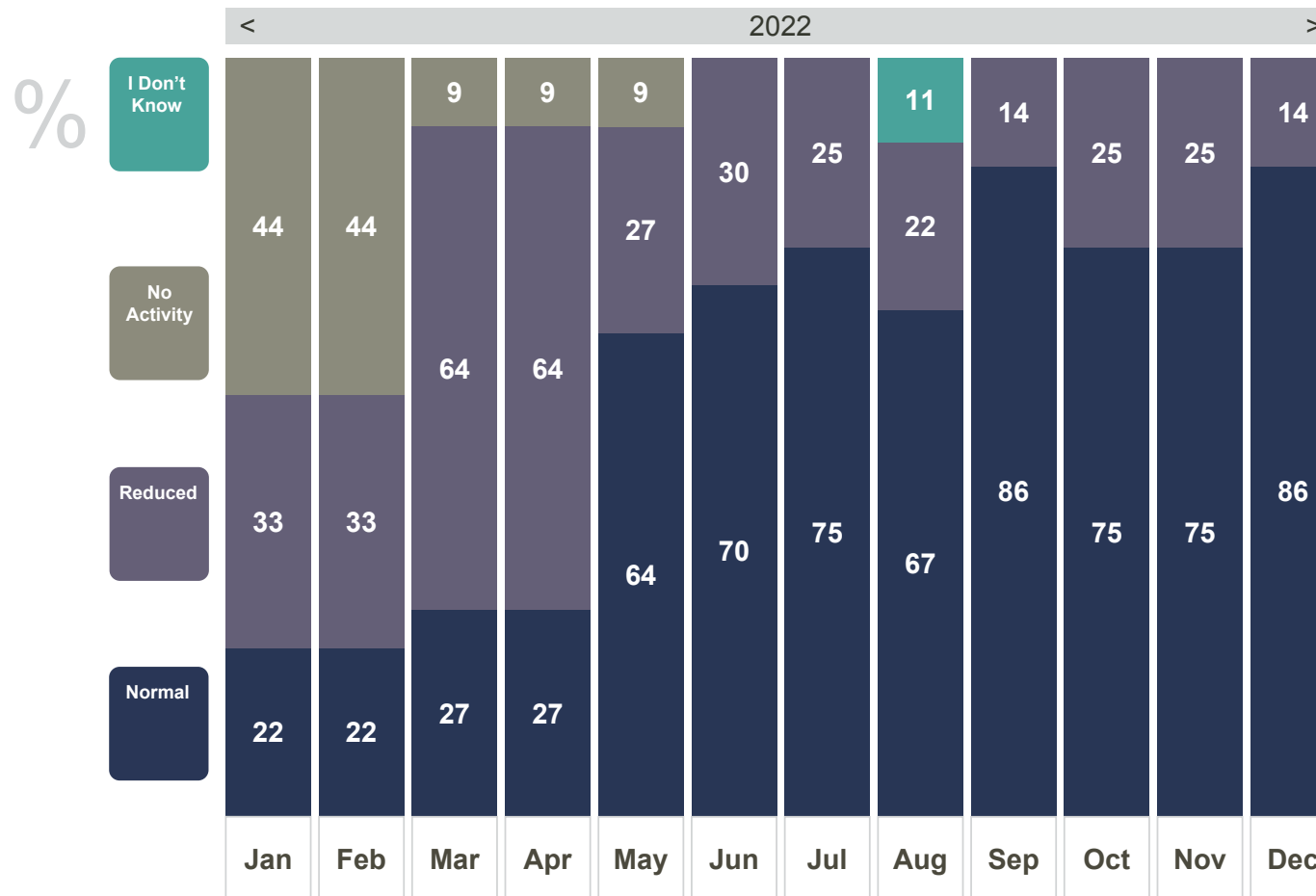
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

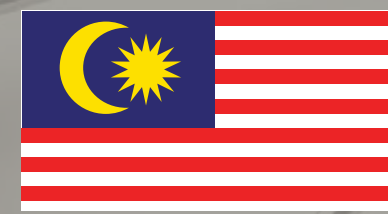
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



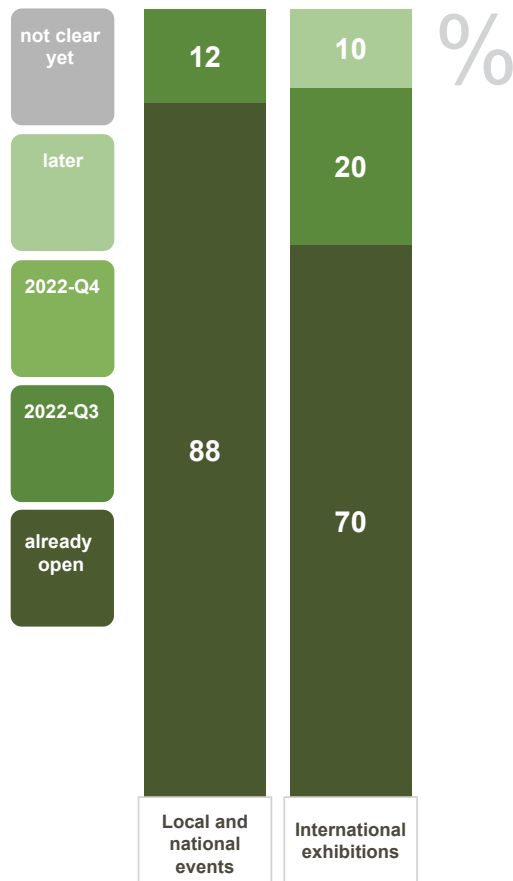


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

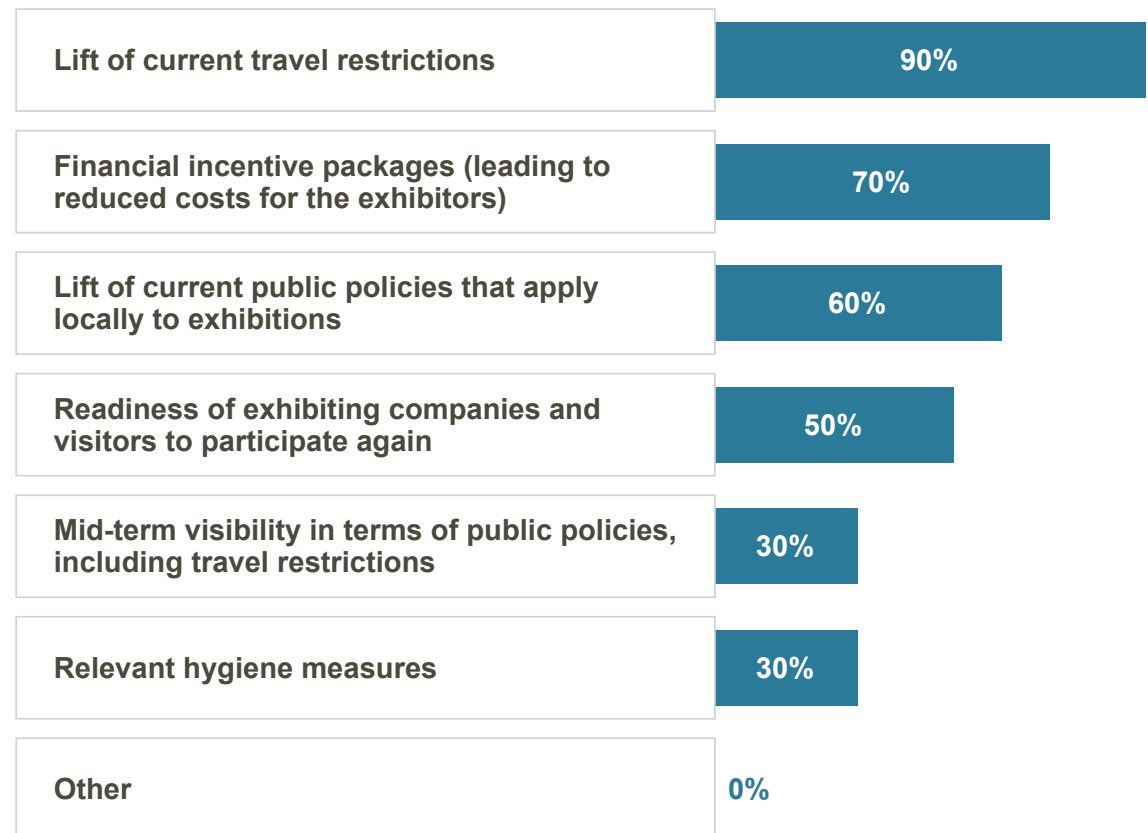




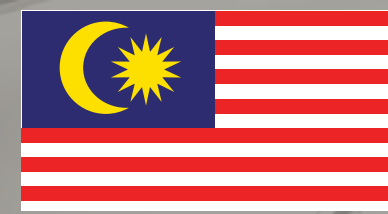
When do you believe exhibitions will open again in your city?



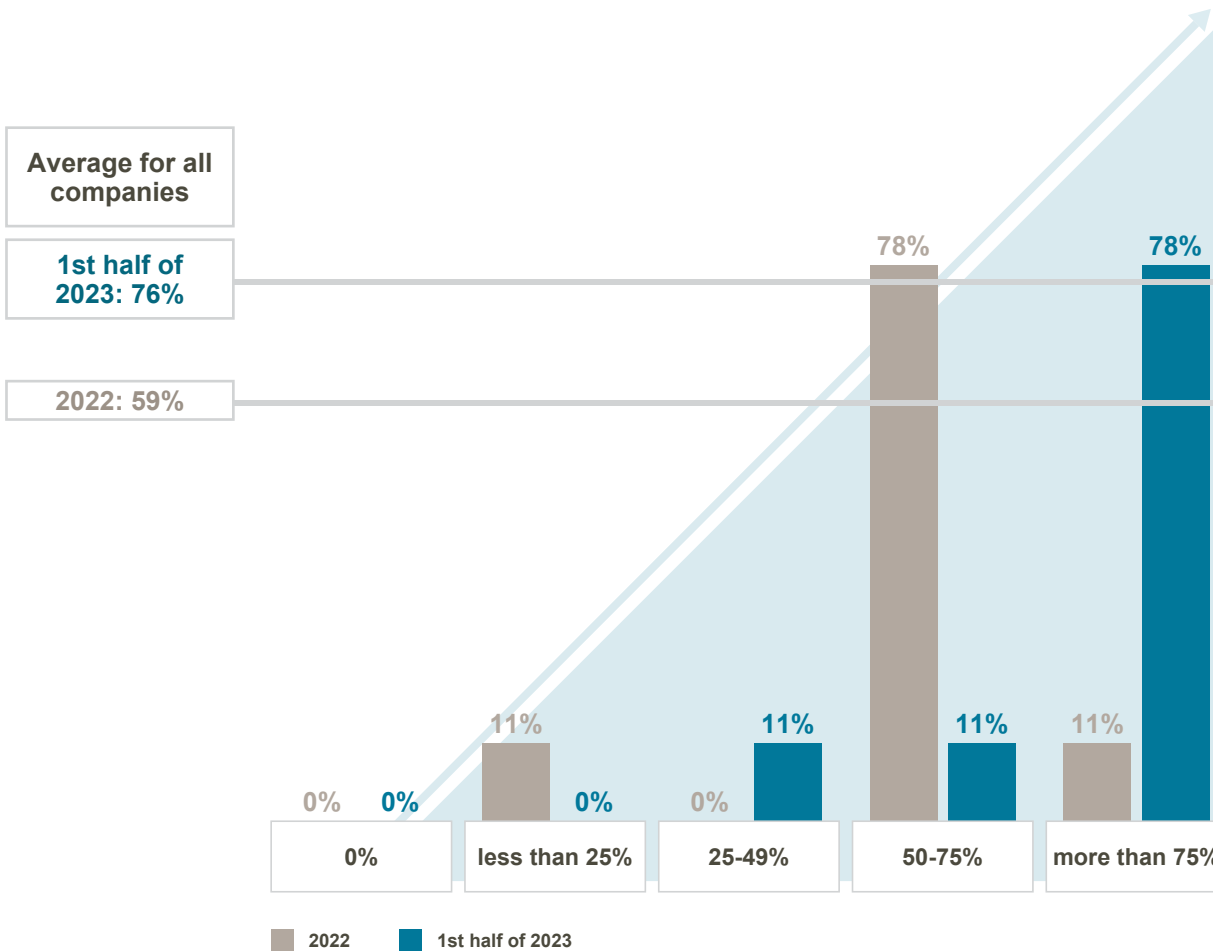
What do you believe would most help the “bounce back” of exhibitions?



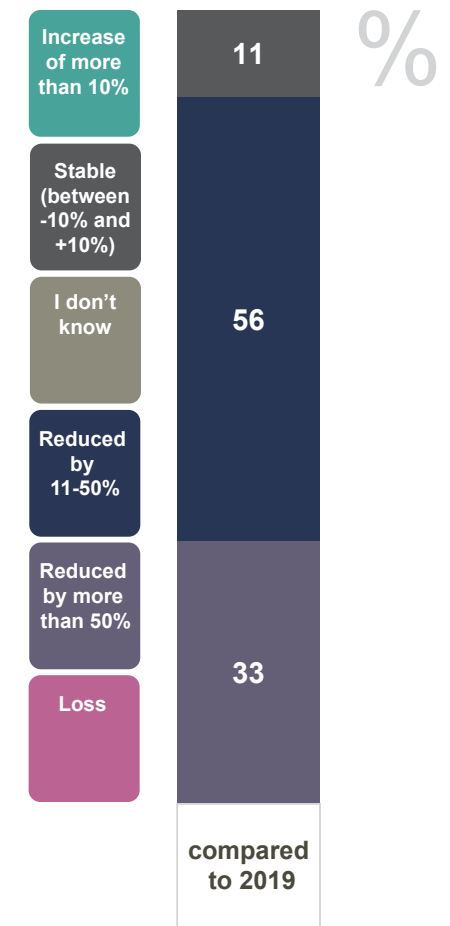
Detailed results for Malaysia

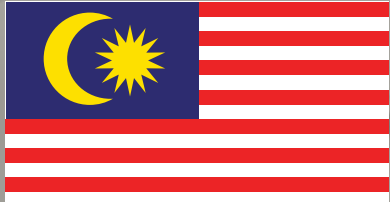


Revenue compared to 2019



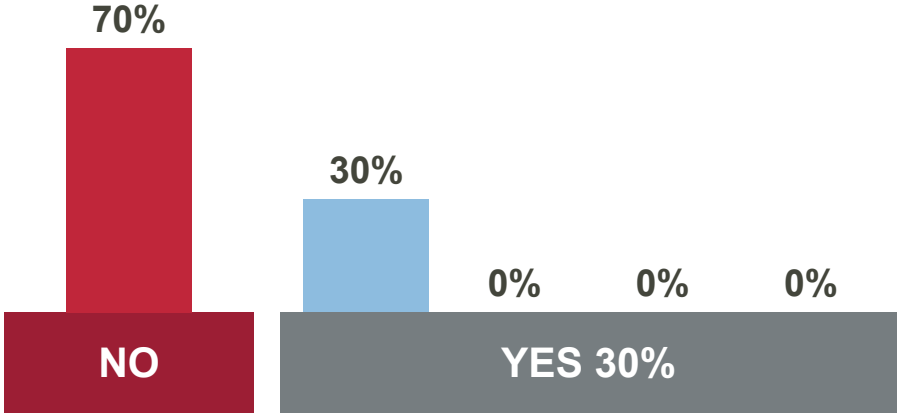
Operating Profits 2021

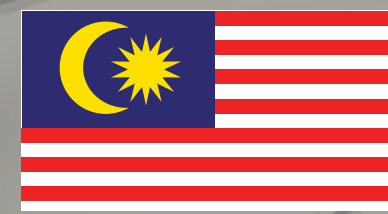




Did your company benefit from public financial support?

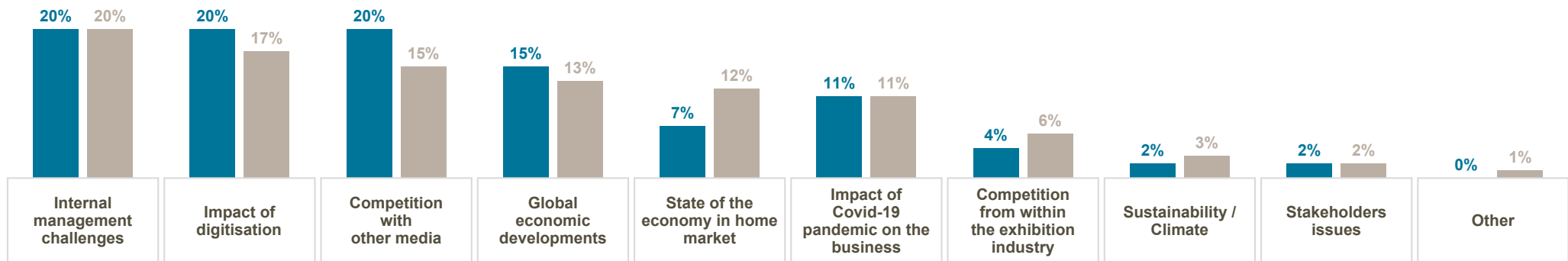
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





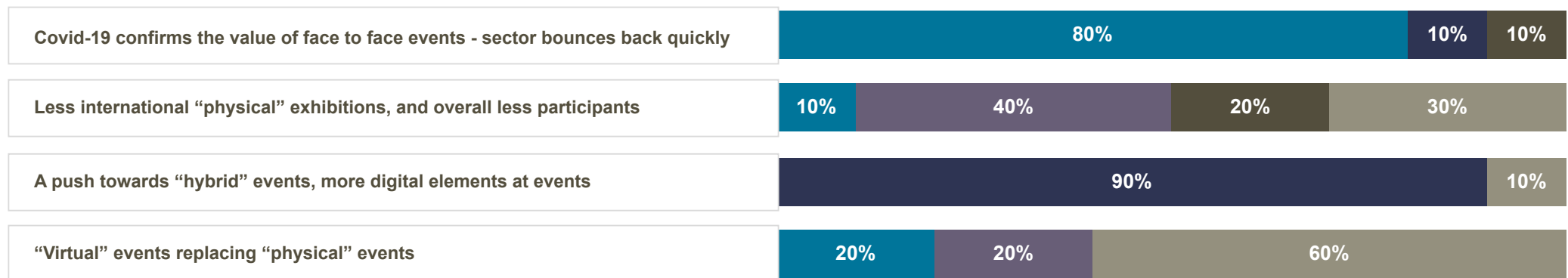
Most important business issues in the exhibition industry

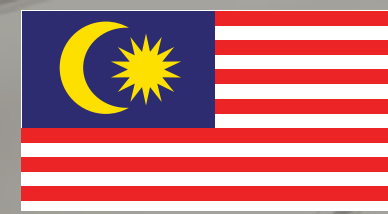
Malaysia Global



Format of exhibitions in the coming years

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

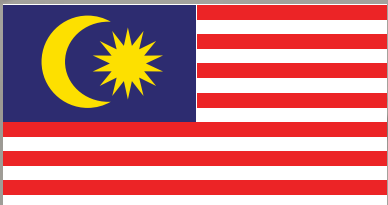




Digitisation: implementation in Malaysia and globally

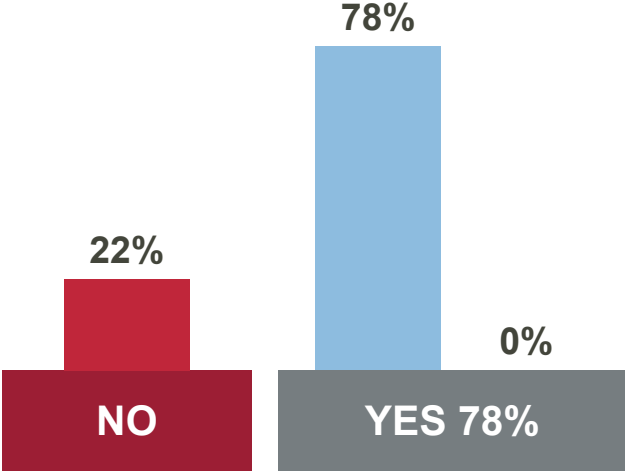
Malaysia Global





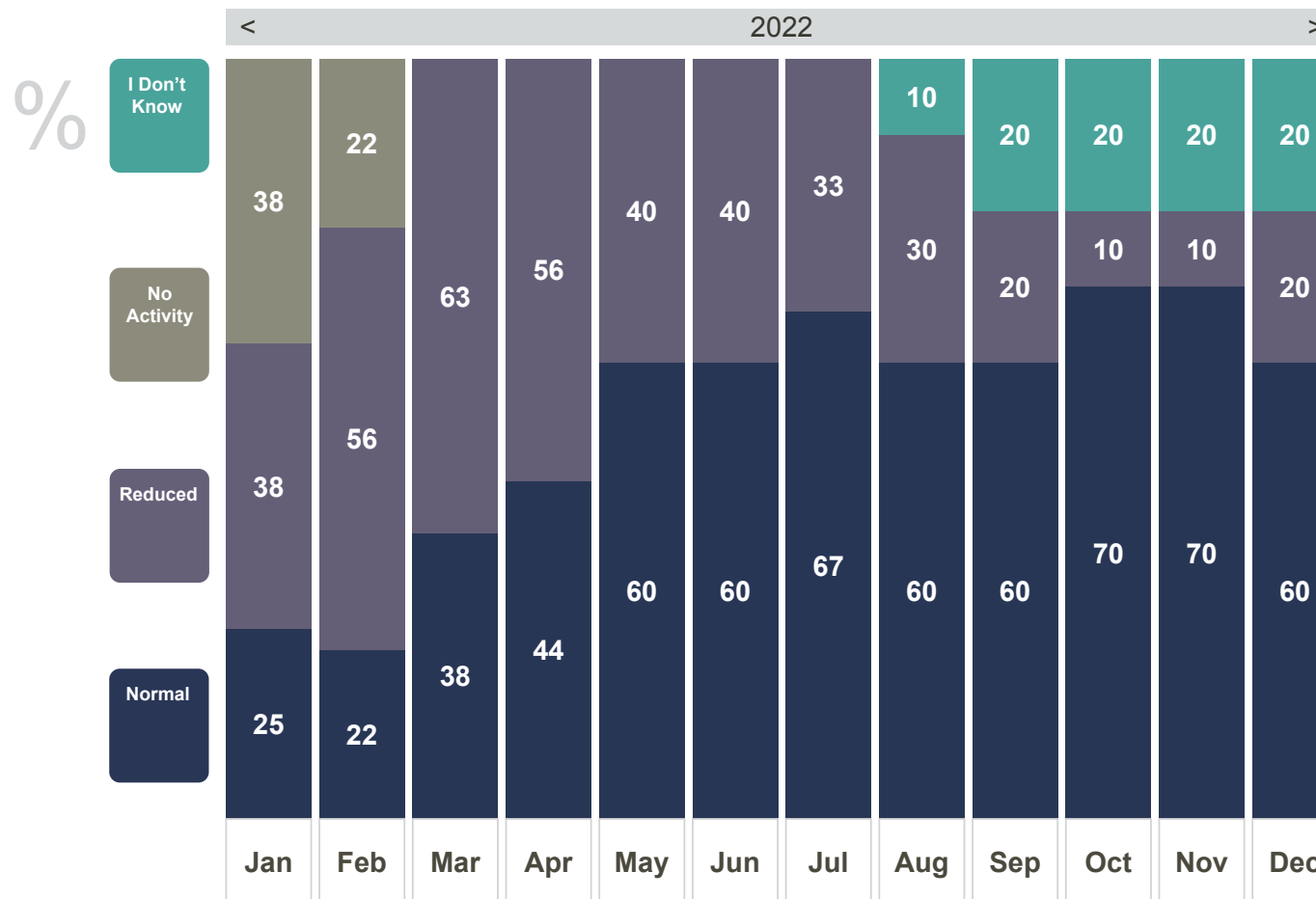
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



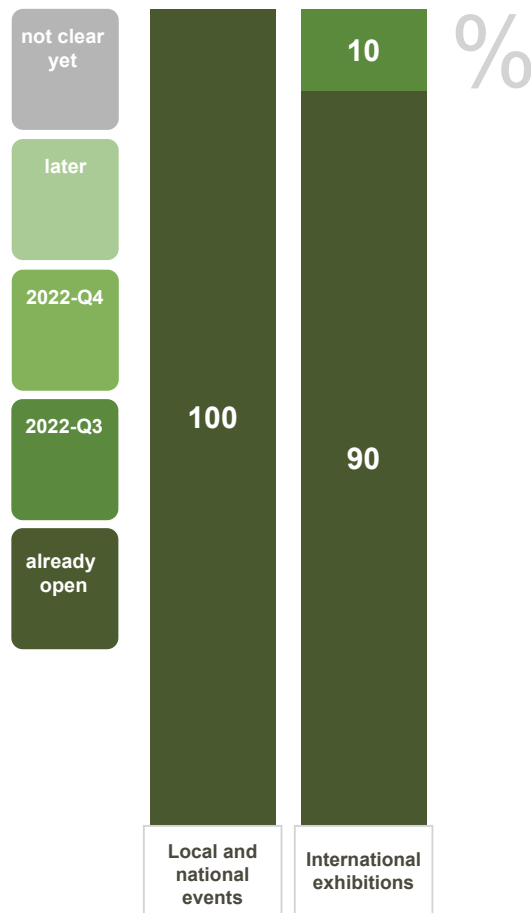


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

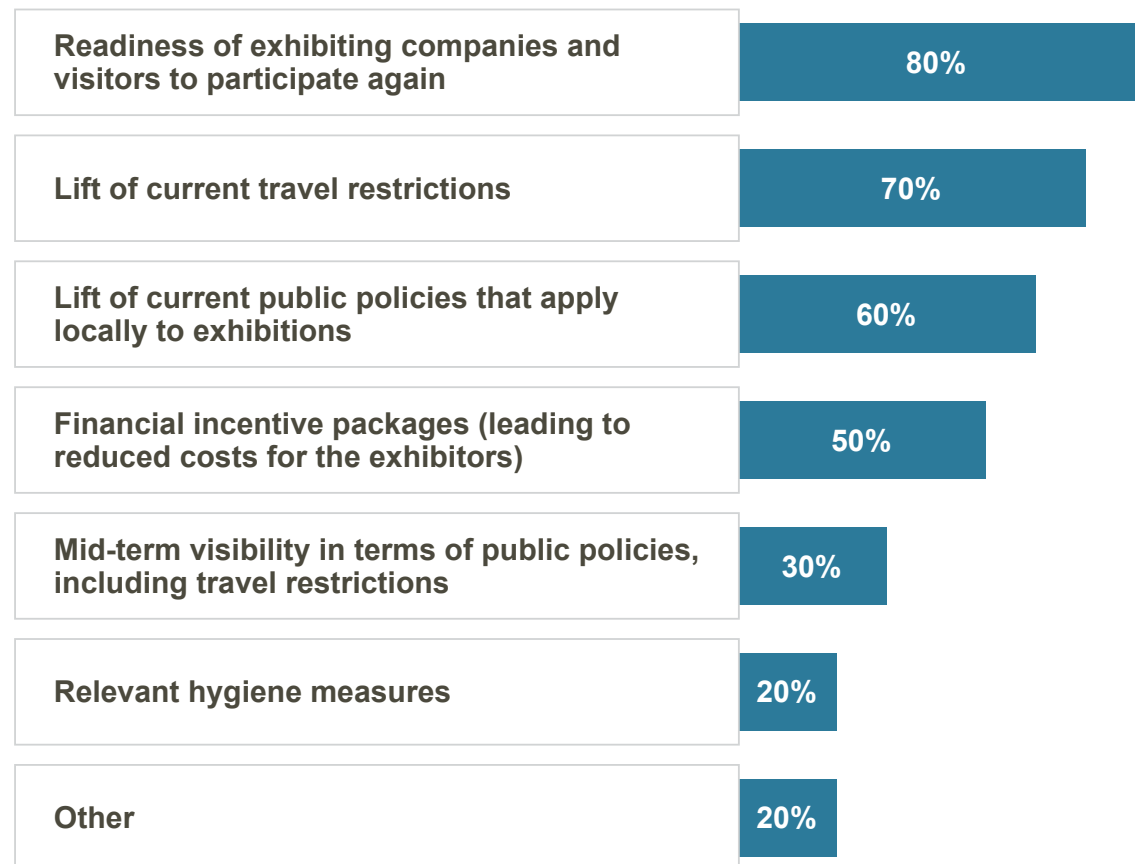




When do you believe exhibitions will open again in your city?



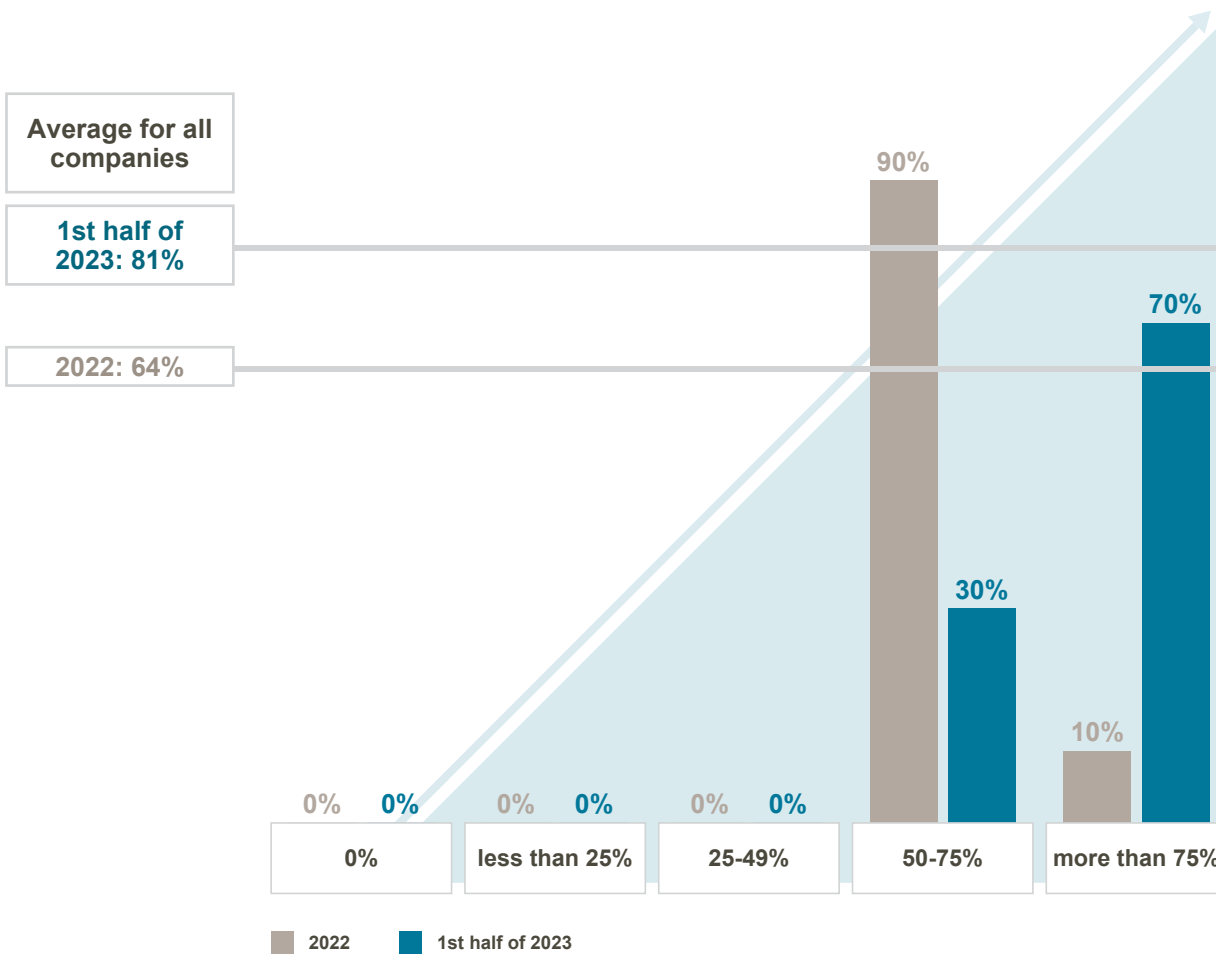
What do you believe would most help the “bounce back” of exhibitions?



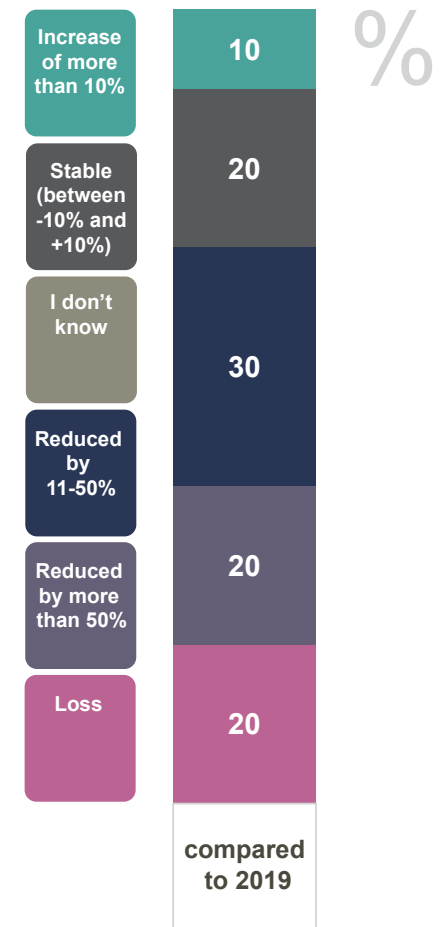
Detailed results for Singapore



Revenue compared to 2019



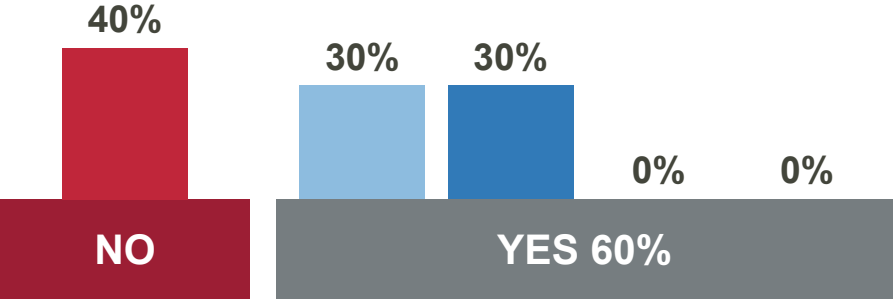
Operating Profits 2021





Did your company benefit from public financial support?

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



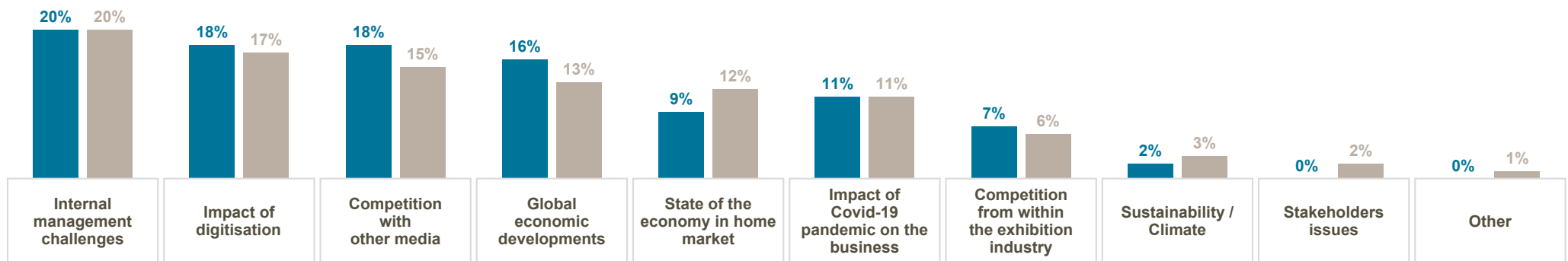
Detailed results for Singapore



Most important business issues in the exhibition industry

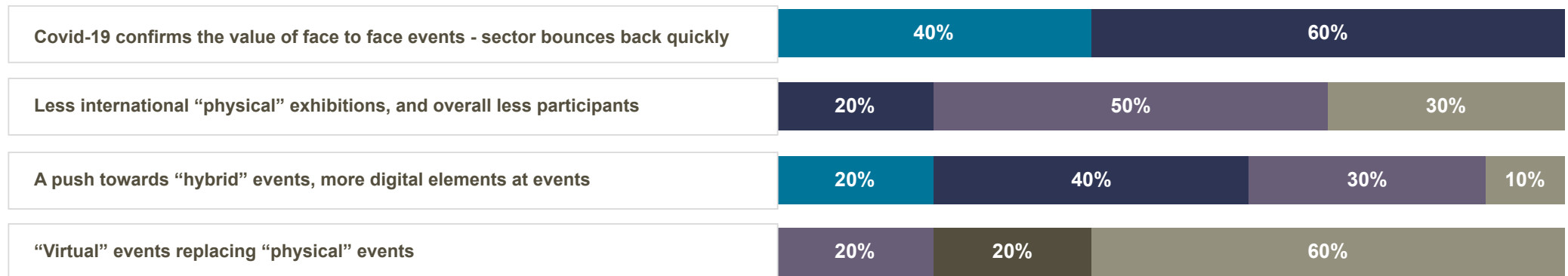
Singapore

Global



Format of exhibitions in the coming years

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

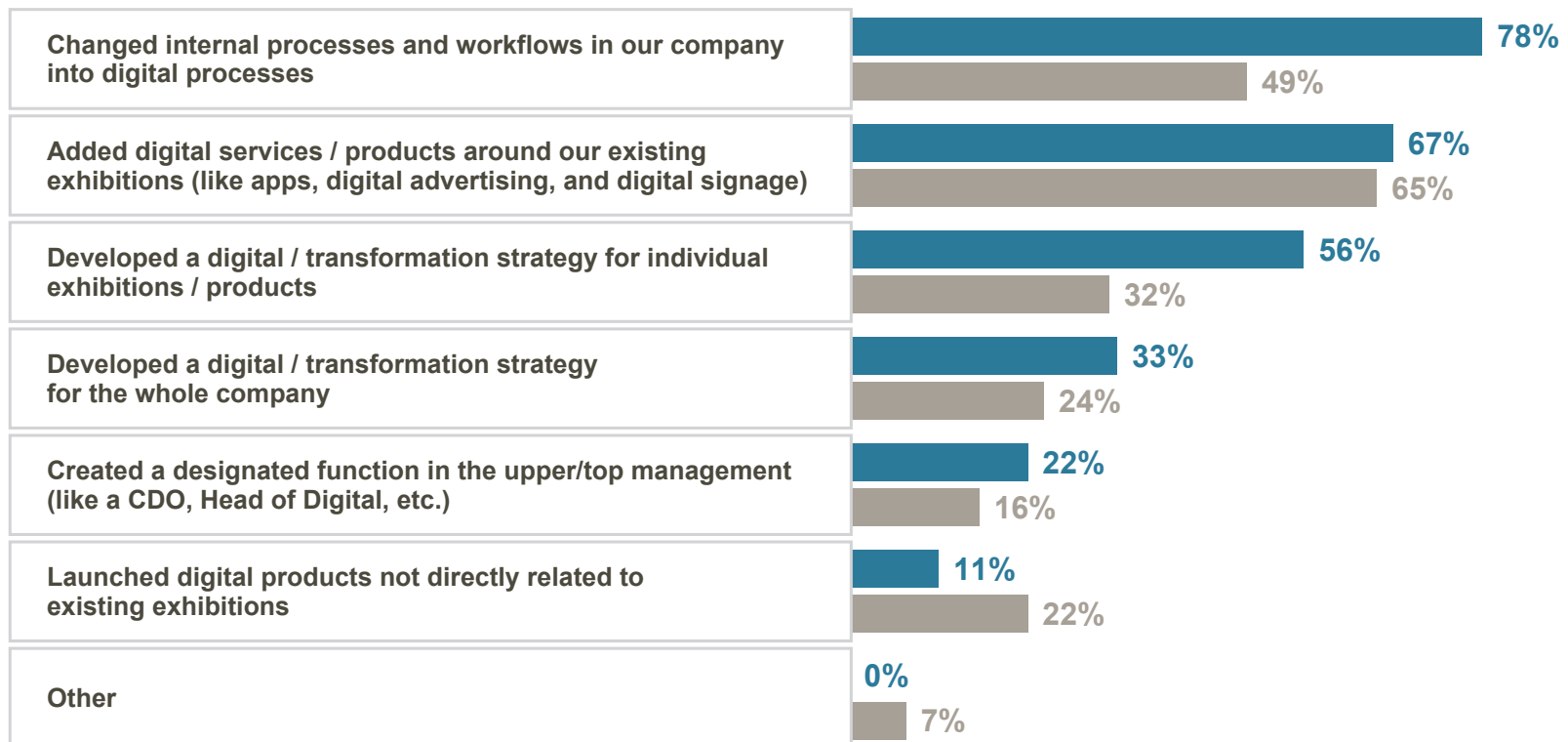




Digitisation: implementation in Singapore and globally

Singapore

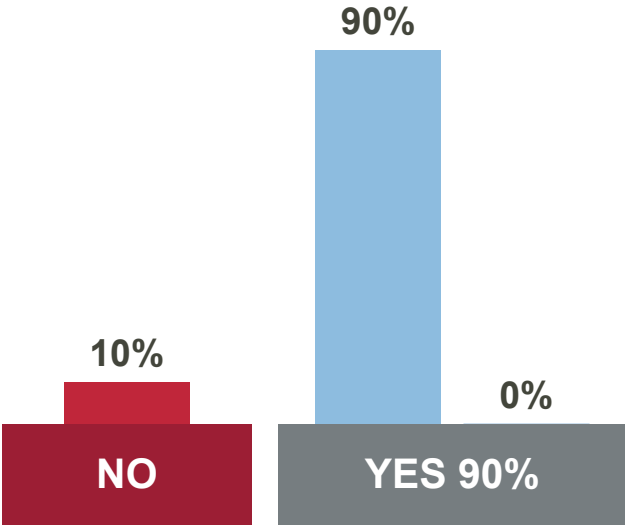
Global





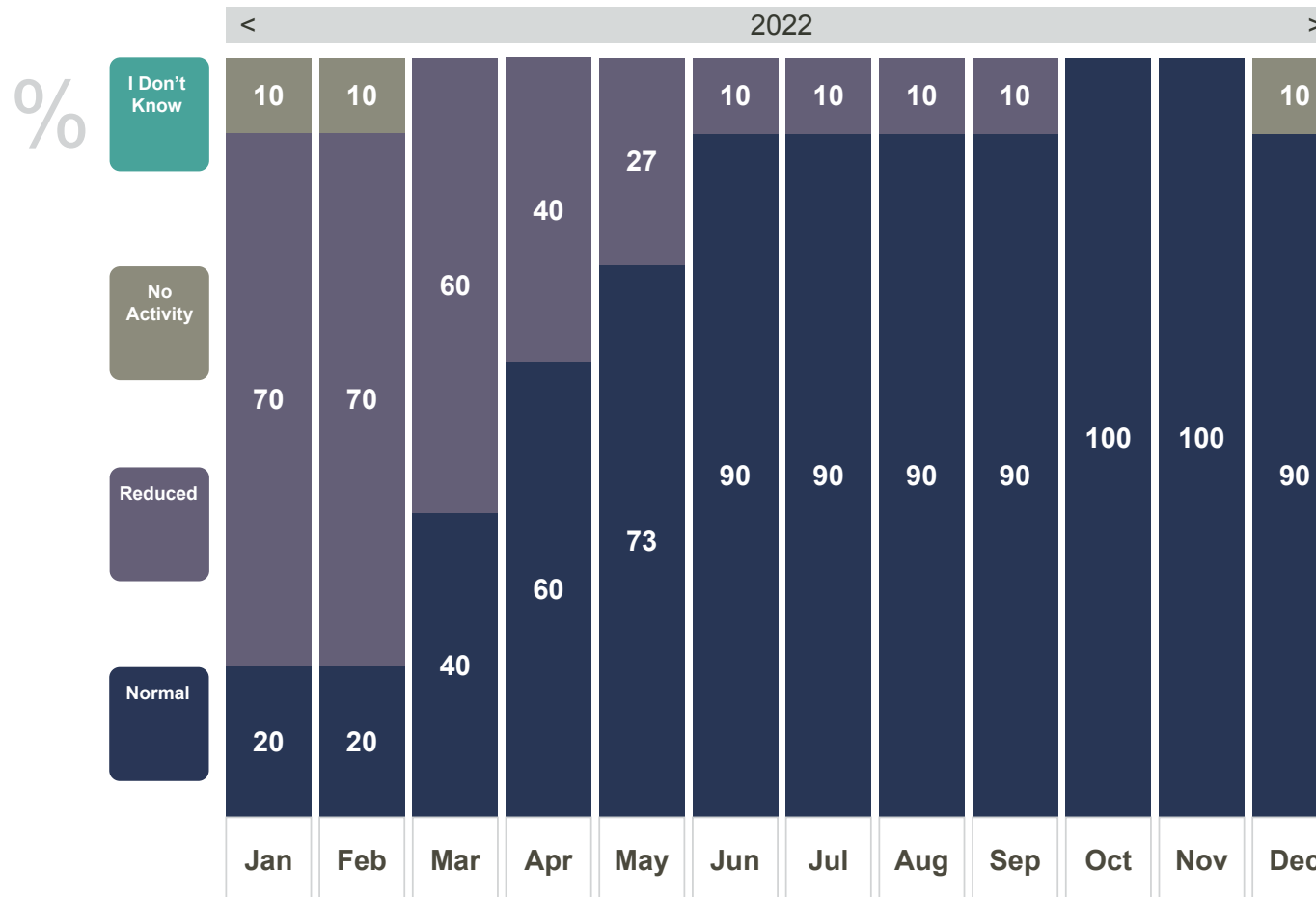
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

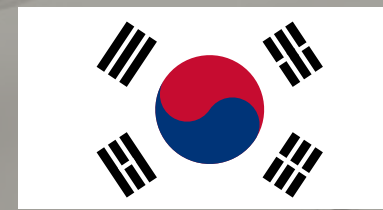
- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



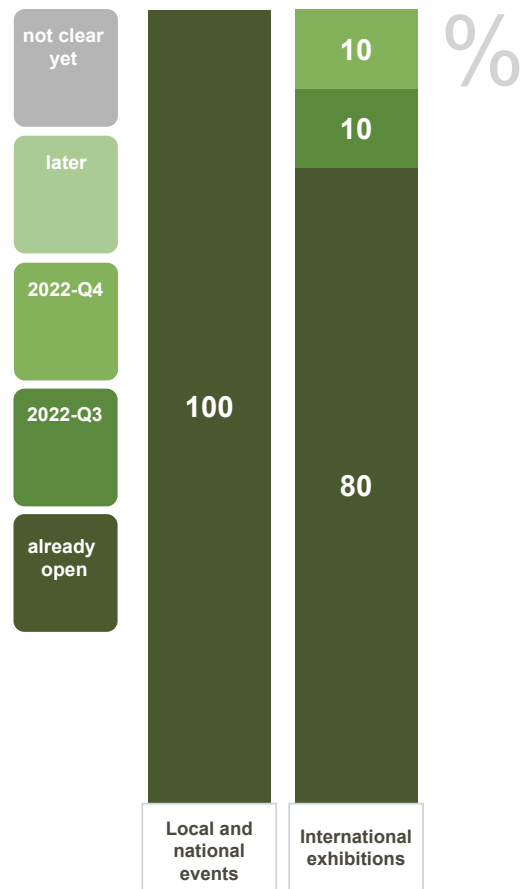


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

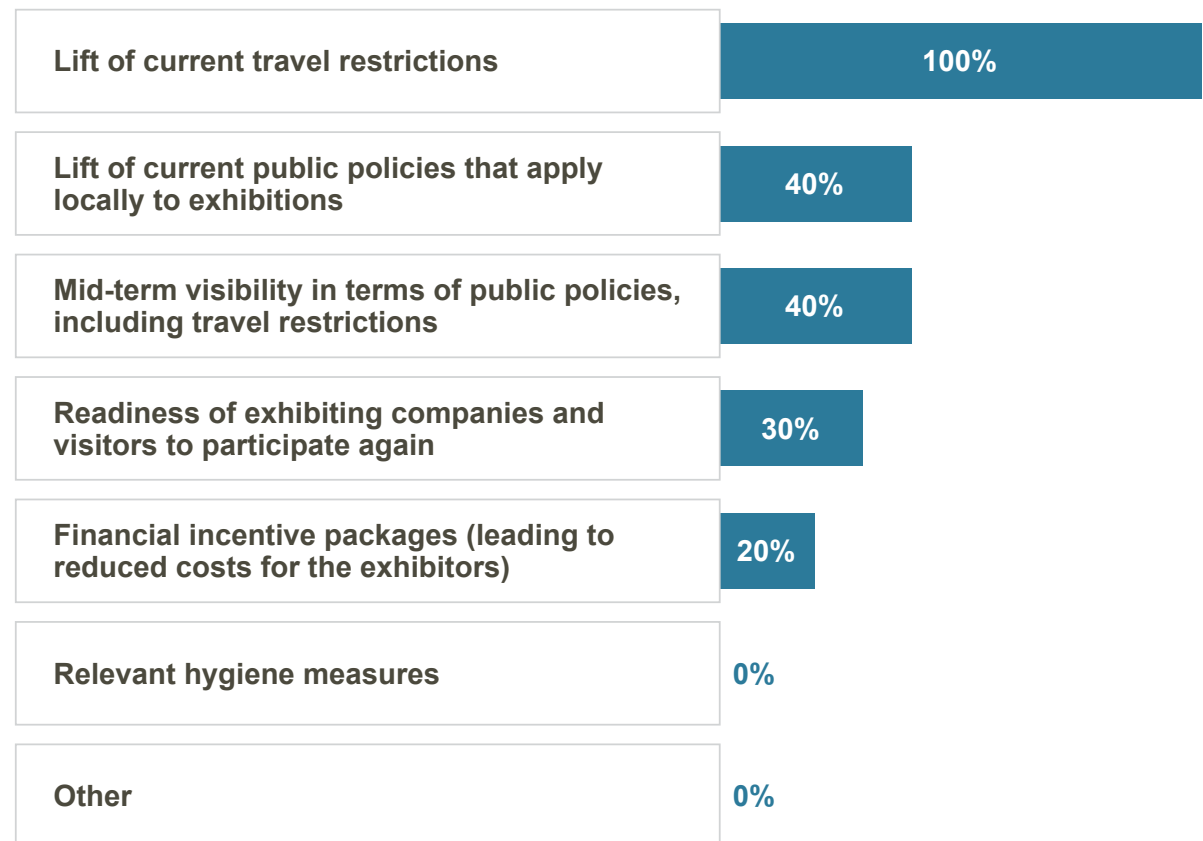




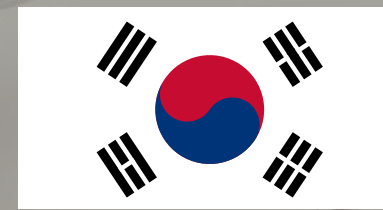
When do you believe exhibitions will open again in your city?



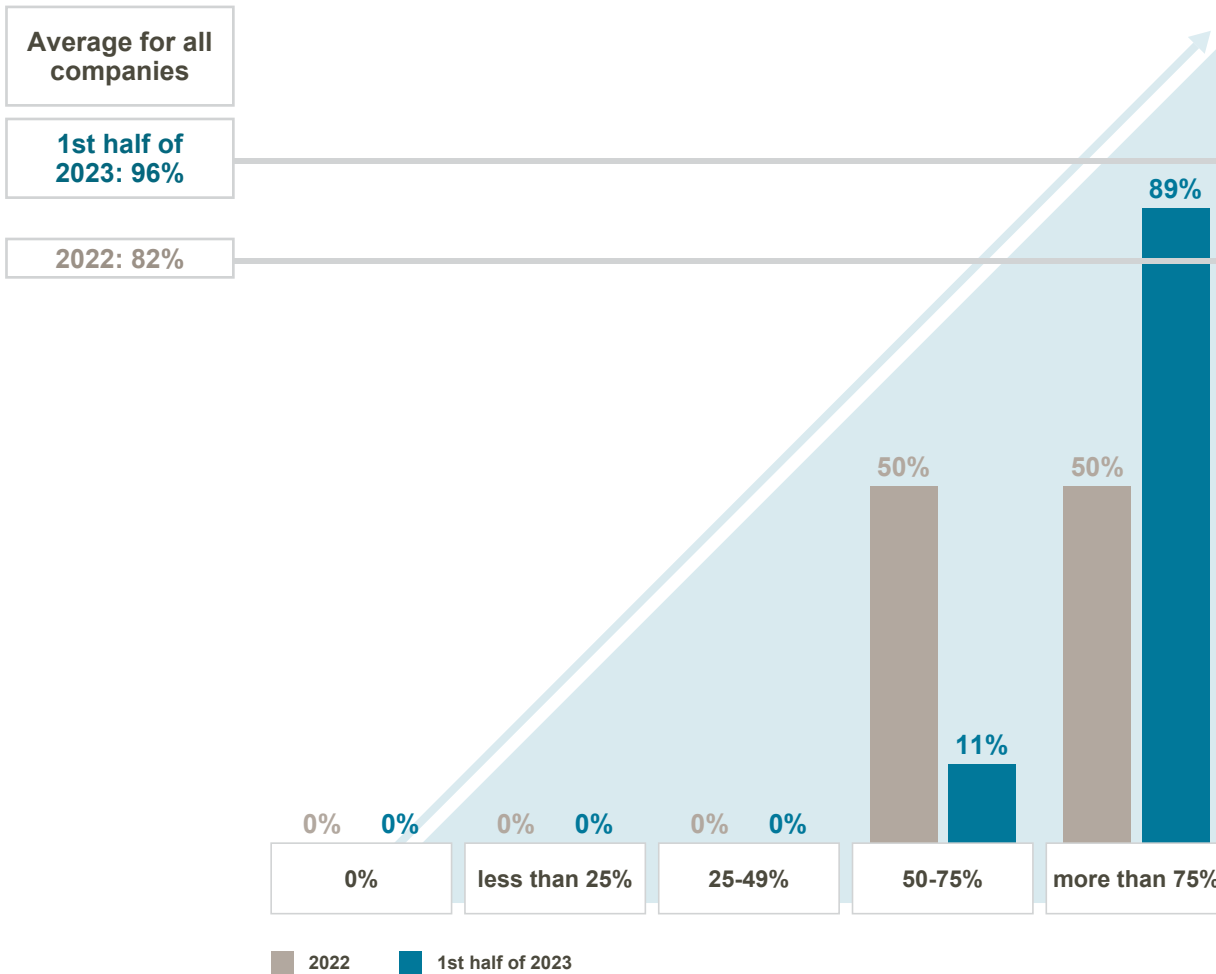
What do you believe would most help the “bounce back” of exhibitions?



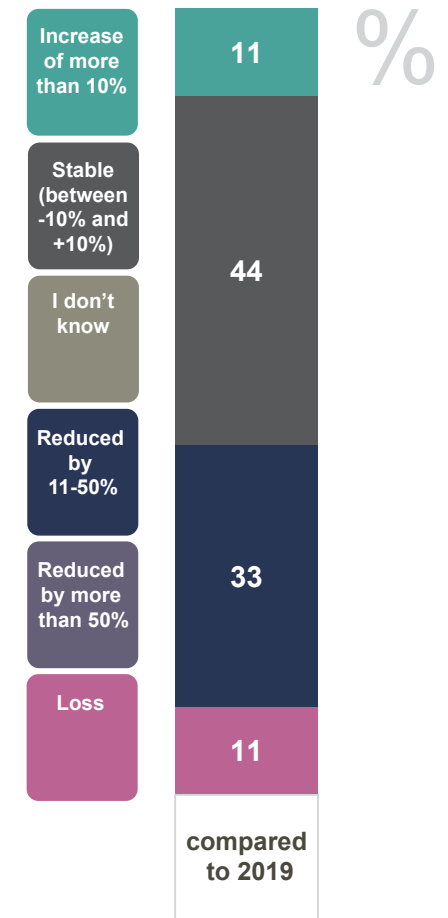
Detailed results for South Korea



Revenue compared to 2019

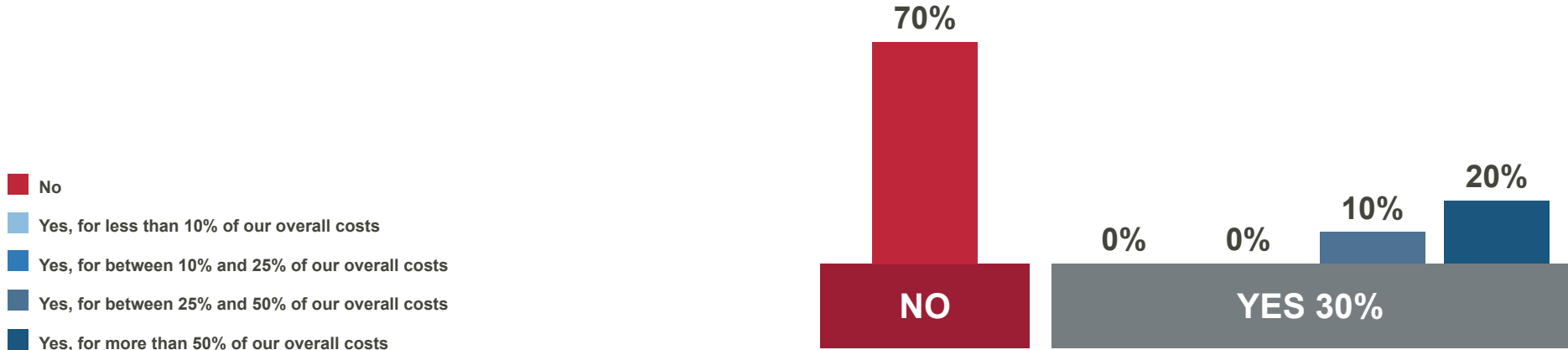


Operating Profits 2021

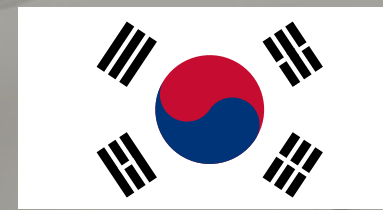




Did your company benefit from public financial support?

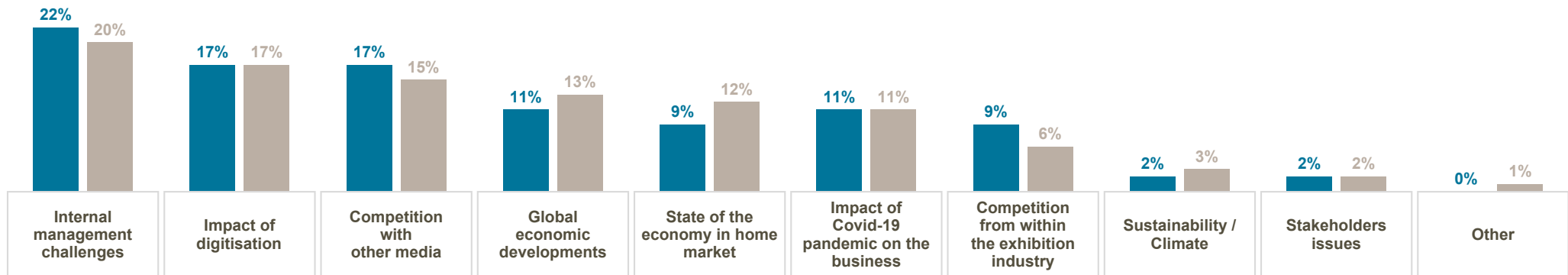


Detailed results for South Korea



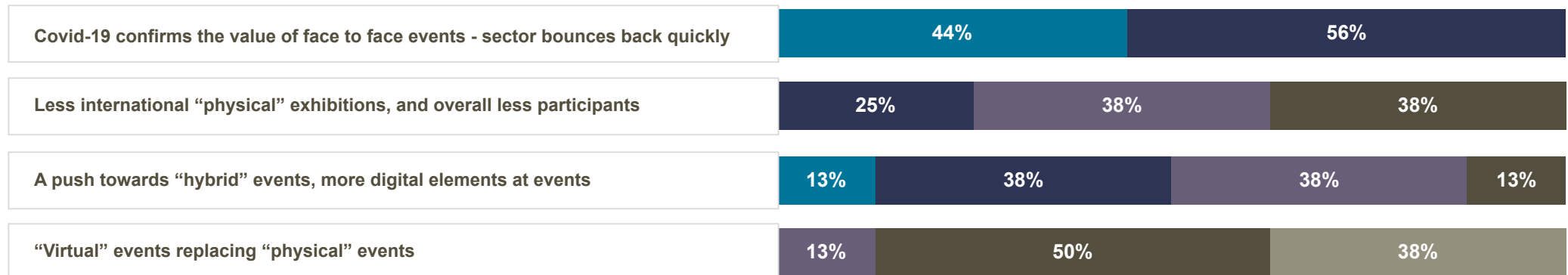
Most important business issues in the exhibition industry

South Korea Global



Format of exhibitions in the coming years

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

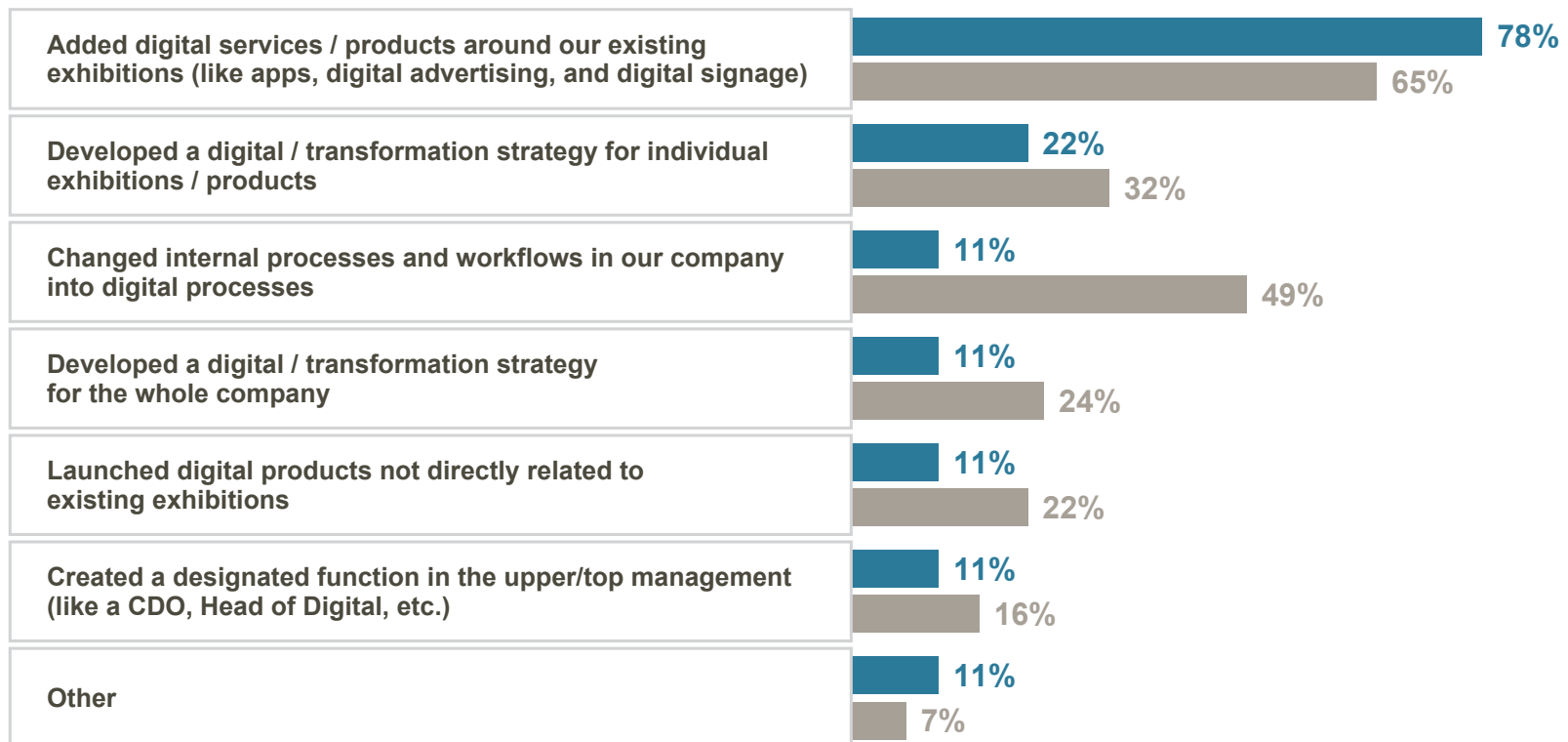




Digitisation: implementation in South Korea and globally

South Korea

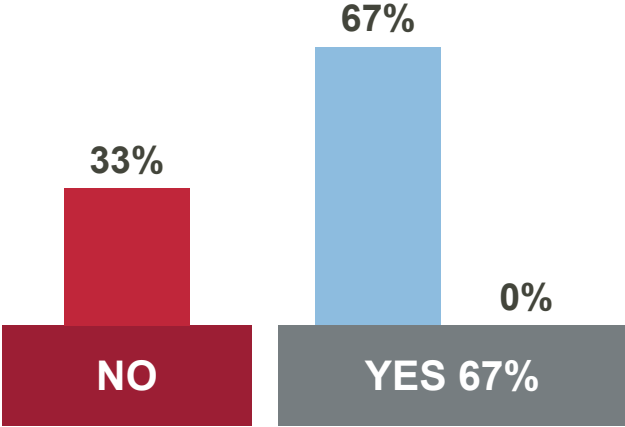
Global





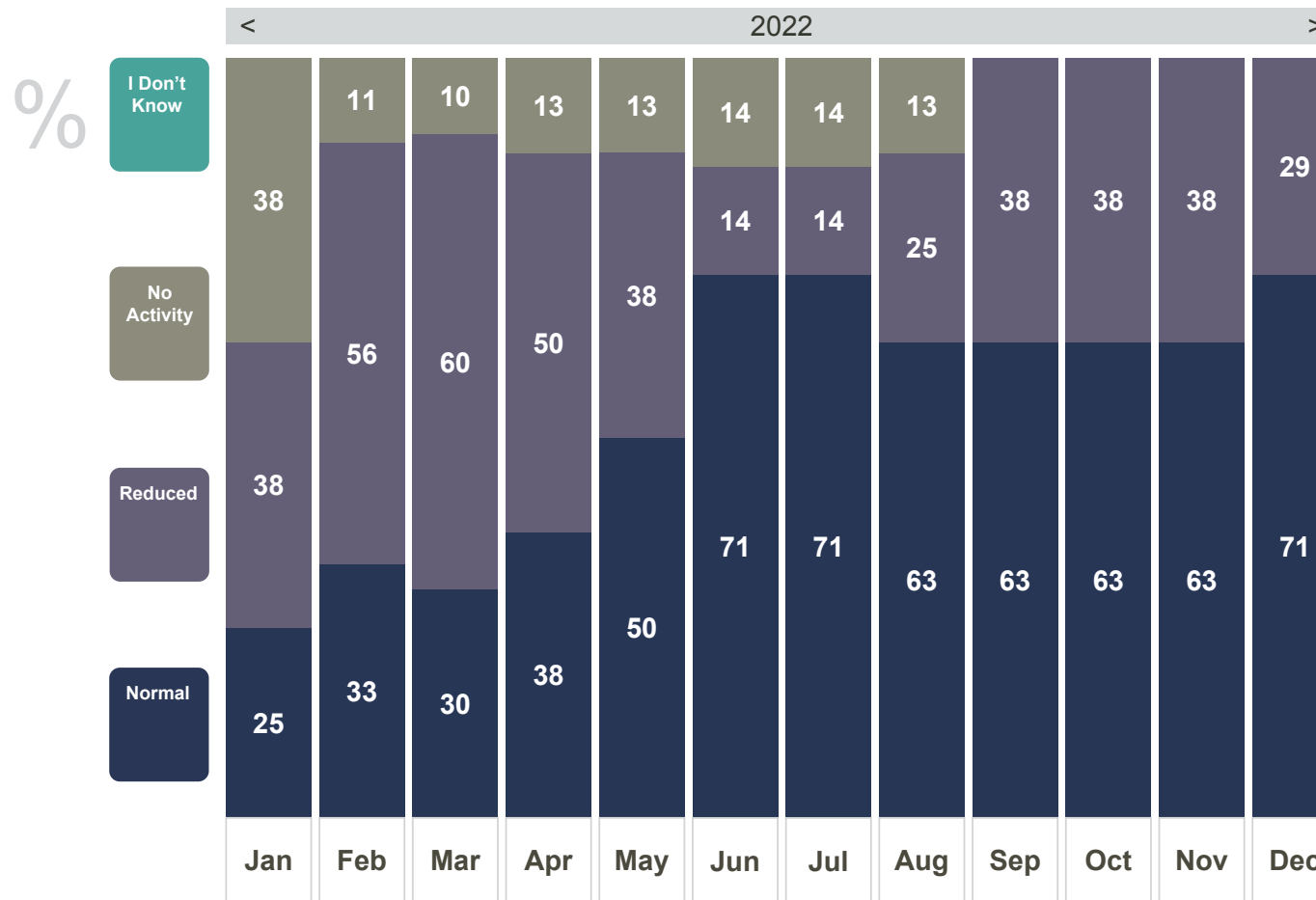
HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



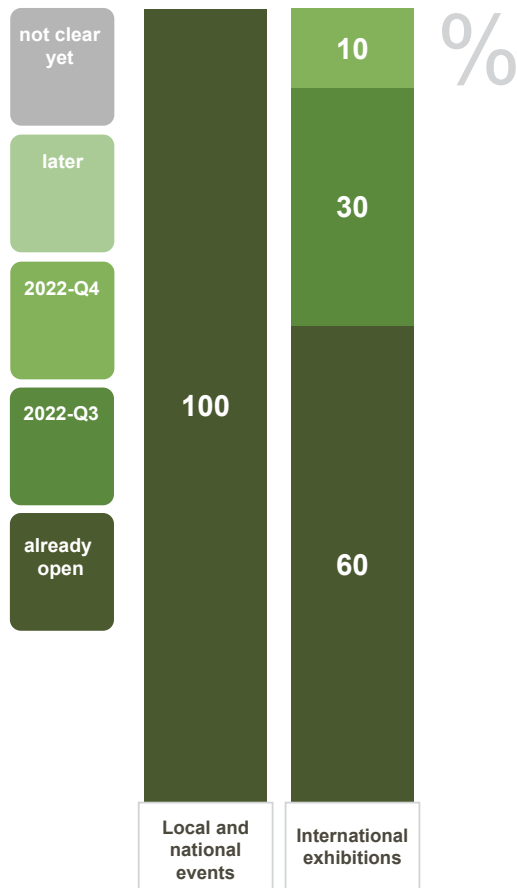


Situation of the industry operations in the 1st half of 2022, and current predictions for the 2nd half of 2022

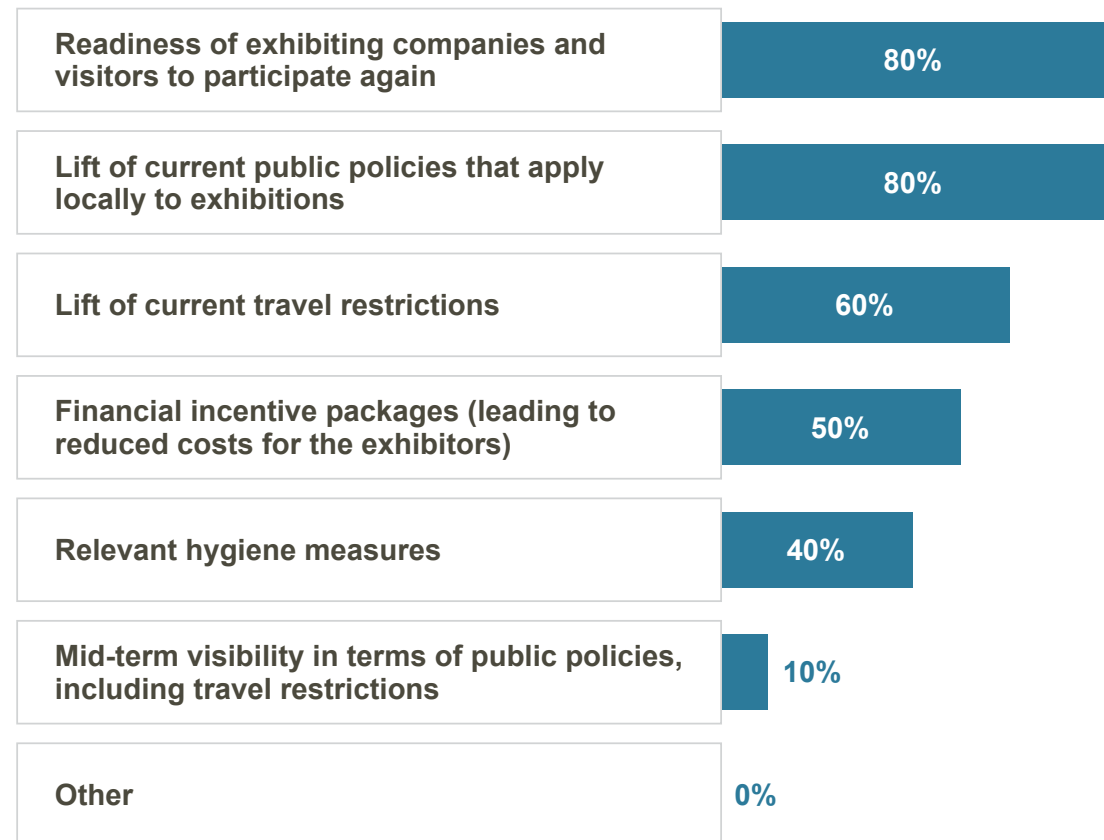




When do you believe exhibitions will open again in your city?

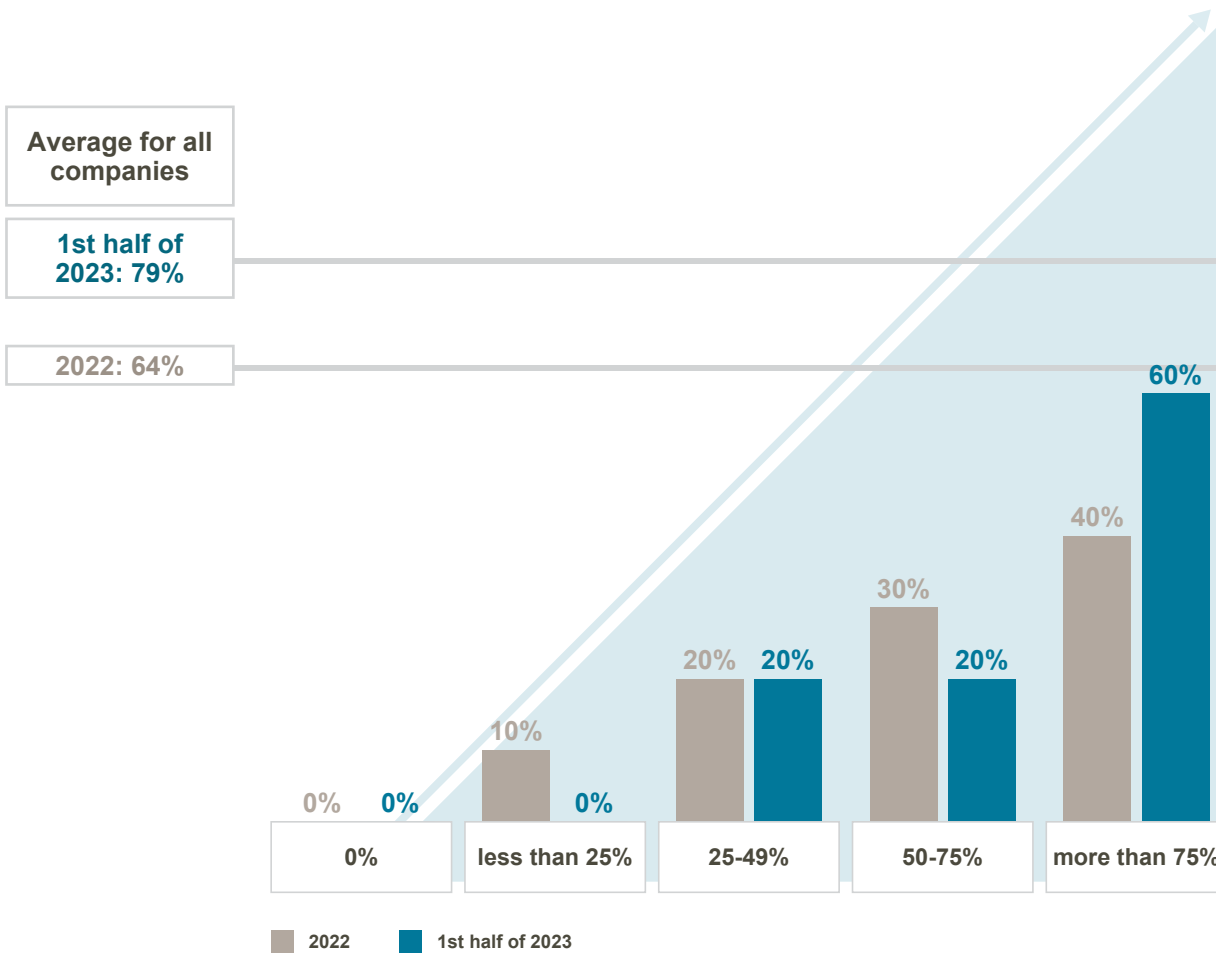


What do you believe would most help the “bounce back” of exhibitions?

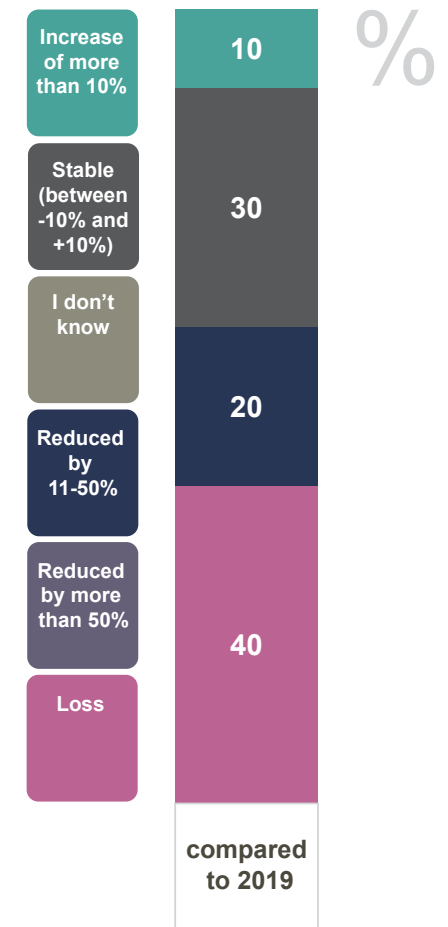




Revenue compared to 2019



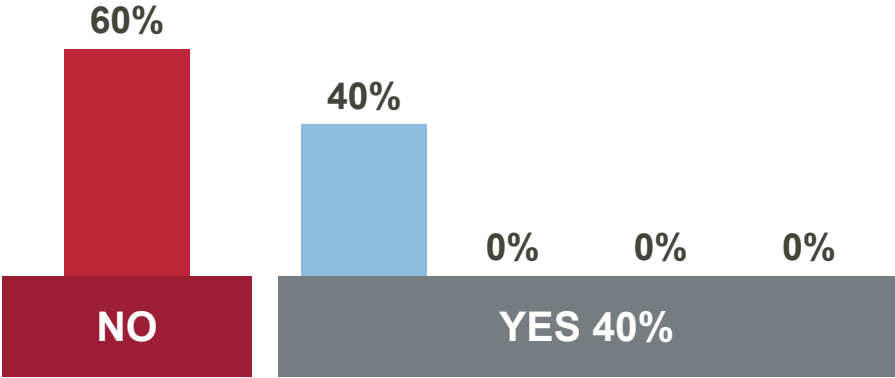
Operating Profits 2021



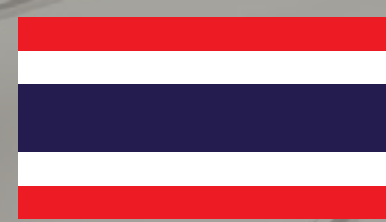


Did your company benefit from public financial support?

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



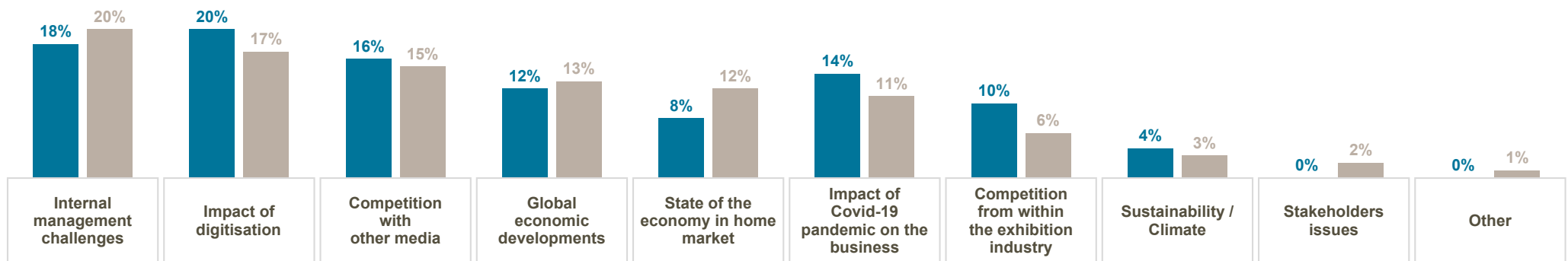
Detailed results for Thailand



Most important business issues in the exhibition industry

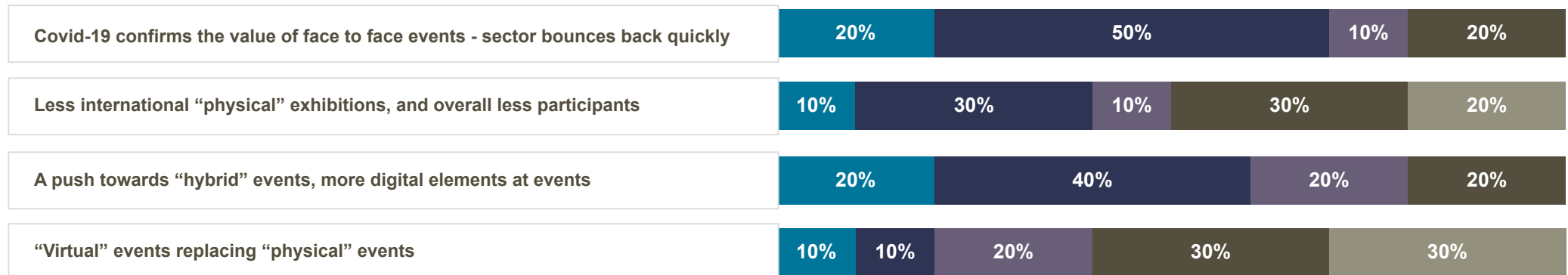
Thailand

Global



Format of exhibitions in the coming years

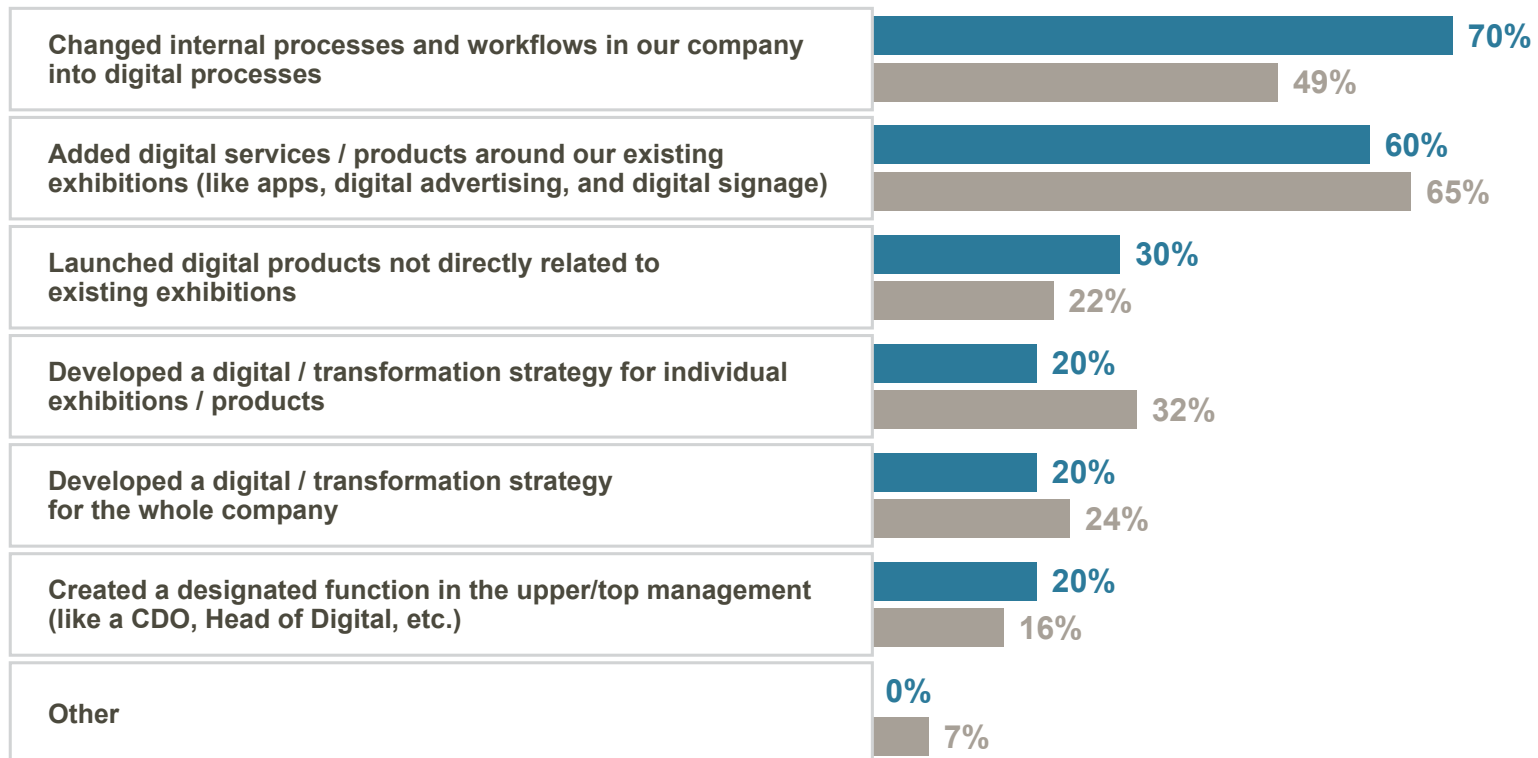
Yes, for sure | Most probably | Not sure | Not sure at all | Definitely not





Digitisation: implementation in Thailand and globally

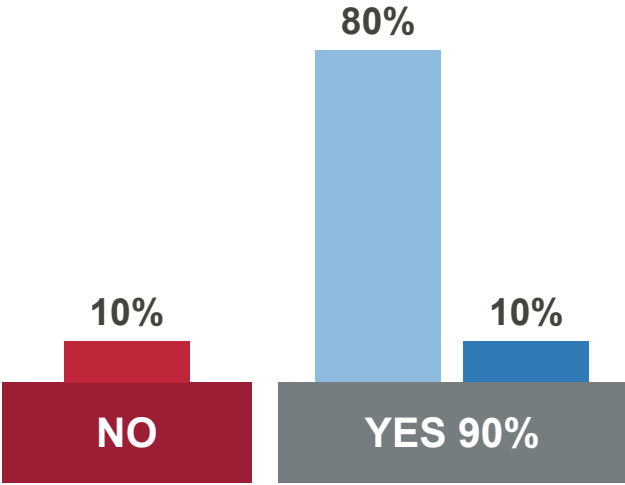
Thailand Global





HR: Recruitment of additional staff following the restart of activities after the COVID-19 pandemic

- No
- Yes, and it proves difficult to find the right people
- Yes, and it's easy to find the right people



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. This 29th survey was concluded in June 2022 and includes data from 366 companies in 57 countries and regions. The report delivers outlooks and analysis for 23 focus countries and regions. In addition, it analyses 5 aggregated regional zones.

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

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

When asked what elements would best support the "bounce-back" of exhibitions, six in ten companies selected "Lifting of current travel restrictions" and "Readiness of exhibiting companies and visitors to participate again". "Financial incentive packages (leading to reduced costs for the exhibitors)" and "Lift of current public policies that apply locally to exhibitions" are the next two most influential key drivers, mentioned selected by four in ten and three in ten companies respectively.

Globally, and on average, companies have seen a significant increase in their 2022 turnover, which now represents 73% of 2019 levels. They also project this to increase to 87%, taken like-for-like for the first half of 2023.

In terms of operating profit for 2022, 10% of companies globally are expecting a loss, and 15% are expecting a reduction of more than 50%, compared to 2019 levels.

Several regions include countries with a higher-than-average proportion of companies foreseeing a loss in 2022

Overall, 73% of companies received no public financial support, and for the majority of those that did, financial public aid represented less than 10% of their overall costs.

The latest results show significant variations from the previous edition of the Barometer, released in the February 2022. In particular, the "Impact of the COVID-19 pandemic on the business" has dropped from being the most pressing issue, to the sixth-most pressing (from 19% down to 11%).

Currently, the most pressing business issue is "Internal management challenges" (20% of respondents, compared to 19% in the previous edition). There has also been a shift in the second- and third-most pressing issues, with "Impact of digitisation" (17% of respondents, compared to 16% in the previous edition) moving from third to second, and "Competition with other media" (15%, compared to 14% in the previous edition), moving from fourth to third.

Within "Internal management challenges", 64% of respondents selected "Human resources" issues, 45% selected "Business model adjustments", and 39% selected "Finance".

In relation to future exhibition formats, the global results indicate that: 87% of respondents (up from 80% in the previous edition, and 78% in the edition prior to that) agree that “COVID-19 confirms the value of face-to-face events”, and anticipate the sector to bounce back quickly (with 51% stating “Yes, for sure” and 36% stating “Most probably”).

- 31% (compared to 44% and 46% previously) believe there will be “Less international ‘physical’ exhibitions and, overall, less participants” (with 4% stating “Yes, for sure”, 27% stating “Most probably” and 26% remaining unsure).
- 61% (compared to 73% and 76% previously) believe there is “A push towards hybrid events, more digital elements at events” (with 19% stating “Yes, for sure”, 42% stating “Most probably” and 20% remaining unsure).
- 6% (compared to 10% and 14% previously) agree that “Virtual events are replacing physical events”, while 16% are unsure and 57% stating “Definitely not”.

Overall, 65% of respondents have added digital services/products (such as apps, digital advertising and digital signage) to their existing exhibition offerings. This is especially the case in Asia-Pacific (71%).

The 29th Barometer surveyed companies’ need to recruit additional staff following the restart of activities after COVID-19, and sought to gain insight into their most successful approaches.

Globally, 69% of companies are currently in the process of recruiting more staff, and 90% are facing difficulties with sourcing appropriate candidates.

In all regions, most companies are currently recruiting more staff, while at the national level, China is the only country where most companies are not recruiting.

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

Appendix: Number of survey replies per country

Total = 366 (in 57 countries/regions)

North America	31	Europe	103	Middle East & Africa	49
Canada	1	Albania	1	Bahrain	1
Mexico	17	Belgium	3	Lebanon	1
USA	13	Bulgaria	1	Oman	3
		Croatia	1	Qatar	3
Central & South America	71	Czech Republic	1	Saudi Arabia	14
Argentina	11	Finland	2	South Africa	15
Bolivia	3	France	2	United Arab Emirates	12
Brazil	17	Georgia	1		
Chile	11	Germany	14	Asia-Pacific	112
Colombia	12	Greece	4	Australia	15
Costa Rica	1	Hungary	1	China	15
Ecuador	3	Italy	16	Hong Kong	10
Guatemala	4	Kazakhstan	1	India	13
Honduras	1	Netherlands	2	Indonesia	3
Panama	4	Poland	1	Japan	11
Peru	3	Portugal	1	Malaysia	10
Uruguay	1	Spain	12	Myanmar	1
		Sweden	4	Pakistan	2
		Switzerland	2	Philippines	1
		Turkey	21	Singapore	10
		United Kingdom	12	South Korea	10
				Thailand	10
				Vietnam	1

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