

# UFI Global Exhibition Barometer

 **ufi** The Global Association of the Exhibition Industry

**24<sup>th</sup> Edition**

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



Global



Southern Africa



United Kingdom



Central & South America



Mexico



Indonesia



Australia



India



Japan



Macau



Russia



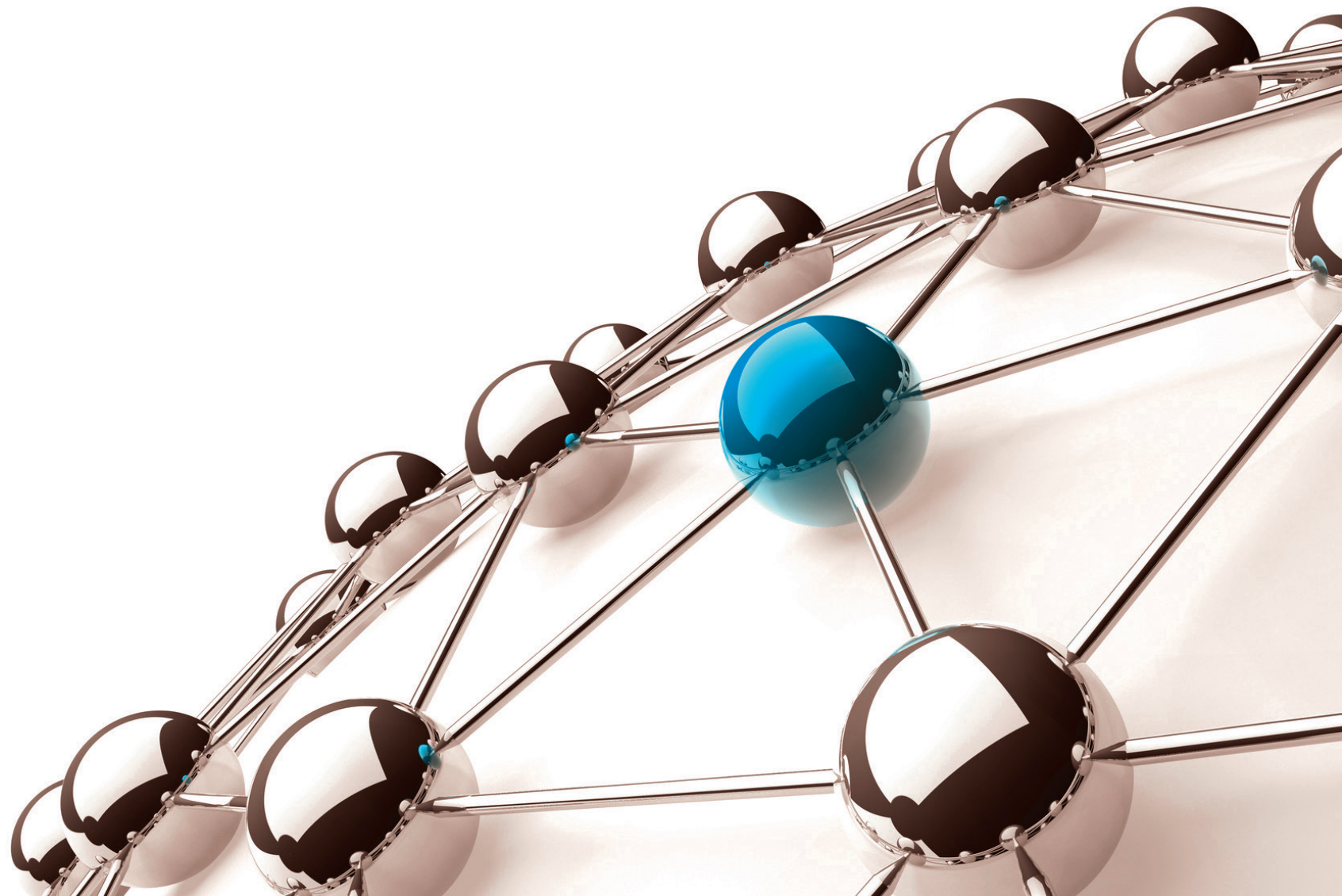
US



Thailand



Brazil



## Global Reports



Analysing the global exhibition industry with global comparisons.

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

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

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

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

## Regional Reports



Regular market overviews on UFI's chapter regions.

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

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

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

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

## Topical Reports



Focused reports on challenges and developments within the exhibition industry.

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

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

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

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[www.ufi.org/research](http://www.ufi.org/research)

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## Results by region

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## Detailed results for selected countries or zones

North America: Mexico, US	25
Central and South America: Argentina, Brazil, Columbia, other countries in South America	29
Europe: Germany, Italy, Russia, UK, other countries in Europe	37
Africa: South Africa	47
Middle East: UAE, other countries in the Middle East	49
Asia - Pacific: Australia, China, India, Indonesia, Japan, Macau, Thailand, other countries in Asia - Pacific	53

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Answers per country/region	70
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Welcome to the 24th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, concluded in January 2020. It represents up-to-date information on the development and outlook of the global exhibition industry as well as on 22 specific countries and zones.

UFI began assessing the impact of the global economic conditions on the exhibition industry twice a year in 2009. Since then, it has regularly grown in size and scope, as numerous industry associations around the world have joined the project.

These associations are 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, AFIDA (Asociación Internacional de Ferias de América) in Central and South America, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs), SISO (Society of Independent Show Organizers) for the UK, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

## Important remarks

It should be noted that the number of replies to the current survey (438 from 70 countries/regions - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 22 countries or zones where a significant number of answers were obtained.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at [research@ufi.org](mailto:research@ufi.org).

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

The 24th Barometer surveyed the evolution of participants' gross turnover expectations for the second half of 2019 and the two halves of 2020 and compared to their turnover during the same period in the previous year (regardless of possible biennial effects).

The following chart presents, at regional level, the percentage of companies declaring an increase in their turnover. It combines these results with those of previous surveys since 2008 and it does not take into account the “unknown” or “not applicable” answers.

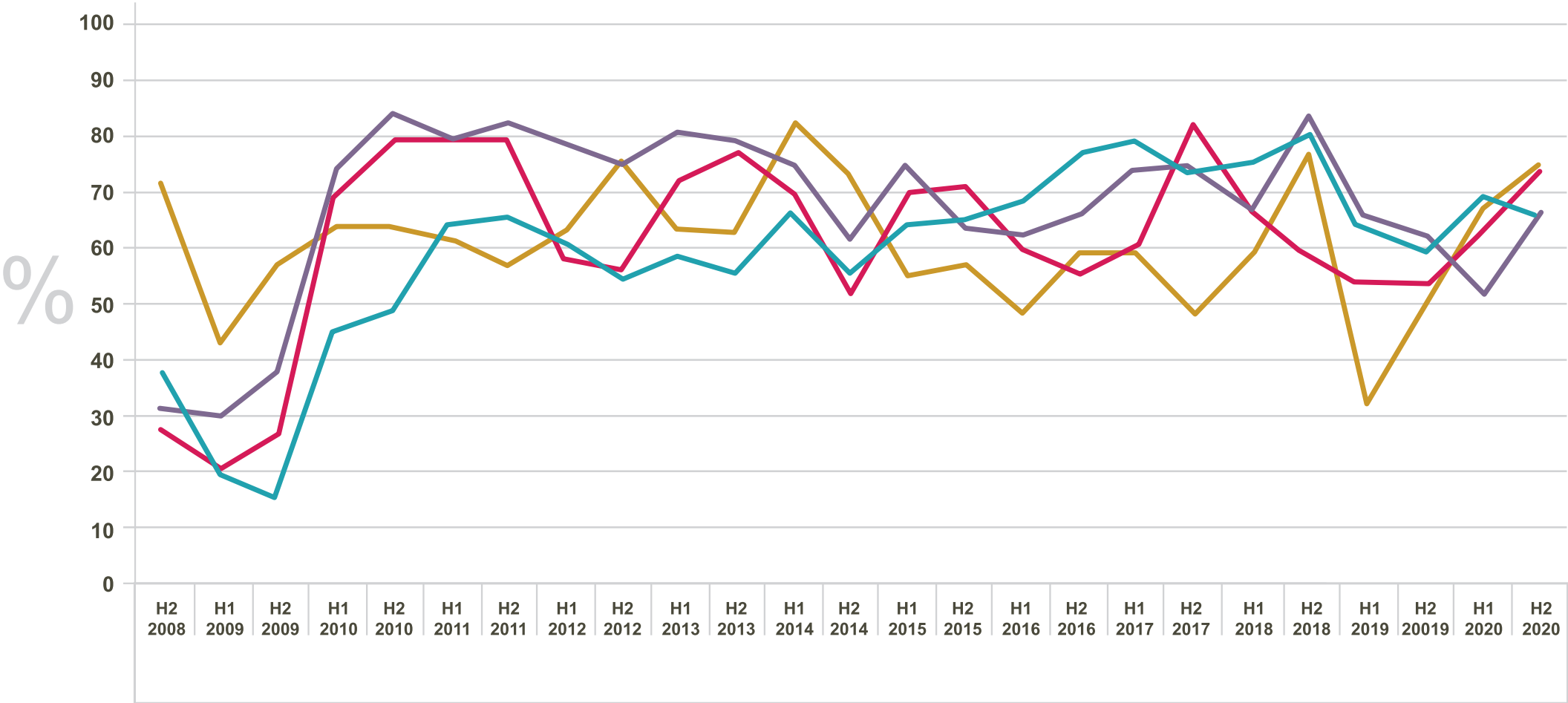
In all regions, a majority of the companies, who could assess their turnover, expect Gross Turnover increases. However, the detailed charts included in the second part of this report, which also identify the “unknown” answers, highlight a strong level of uncertainty in many countries, especially in Asia/Pacific and Latin America.

## As a result:

- **Eight of the selected countries have, for the three periods surveyed, a majority of companies declaring turnover increases: Australia, Brazil, Germany, India, Indonesia, Russia, UAE and USA**
- **Significant levels of uncertainty over the period are recorded in Argentina, China, Macau, Japan, Mexico and the UK.**

# % of companies declaring an increase in turnover when compared to their projections for the same period the year before (regardless of possible biennial effects)

Americas Europe Middle East - Africa Asia - Pacific



The 24th Global Barometer survey questioned the evolution of operating profits for 2019 compared to the previous year.

The following chart combines these results with those of previous surveys, which track the development of operating profits since 2009. It highlights the results of companies declaring an increase of more than 10% and those declaring a stable result (between -10% and +10%). The charts included in the second part of this report (“Detailed results for selected countries or zones”) detail these results, adding the percentage of companies with reductions in profits or losses.

The results show that:

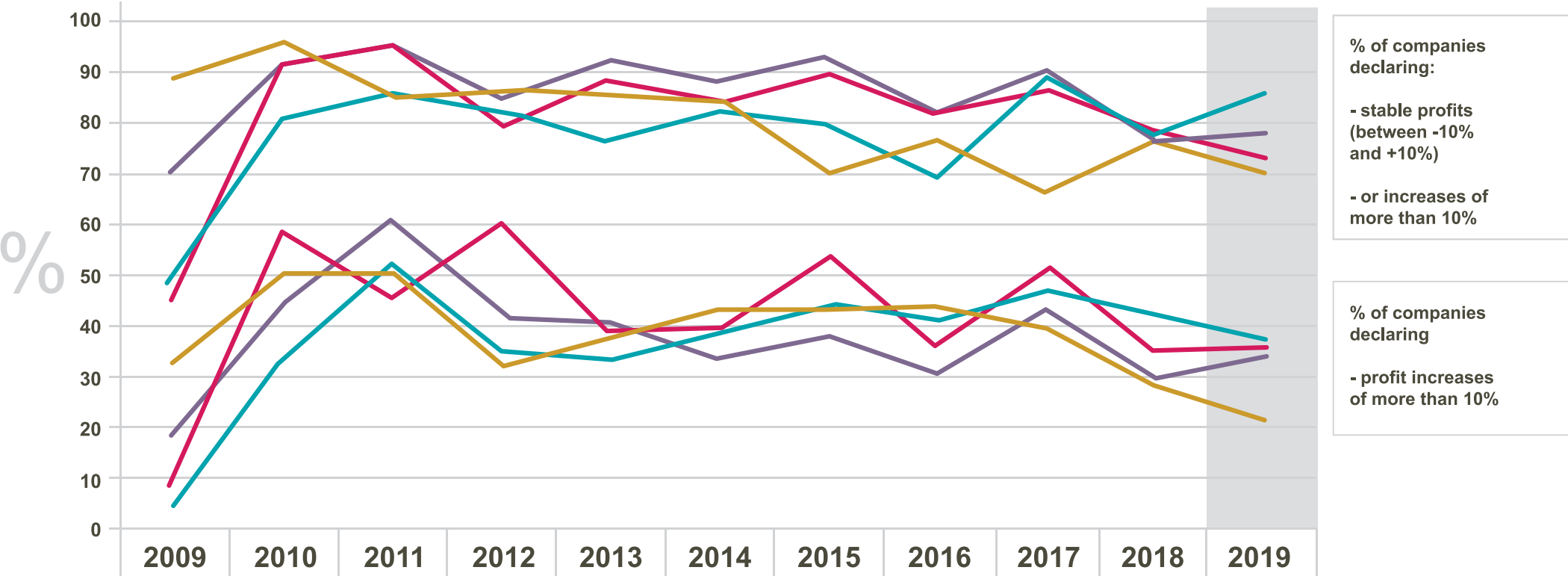
**In each of the four regions, at least 70% of companies maintained a good level of performance in 2019 compared to 2018.**

**The highest proportions of companies declaring an increase of more than 10% of their operating profits observed in the USA (62%), Brazil (50%), Germany (42%), Thailand (42%) and India (41%).**

**On the opposite side, the lowest proportions are in Indonesia (29%), Russia (29%), Australia (28%), South Africa (24%), UAE (11%), Macau (0%) and the UK (0%).**

# Operating Profits compared to the previous year

Americas Europe Middle East - Africa Asia - Pacific



**% of companies declaring:**

- stable profits (between -10% and +10%)
- or increases of more than 10%

**% of companies declaring**

- profit increases of more than 10%



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

As in previous surveys, around the 80% of all answers relate to the following 4 issues:

- **“State of the economy in home market” (26% in the current survey, up 2% compared to 6 months ago);**
- **“Competition from within the industry” (20% in the current survey, up to 1% compared to 6 months ago);**
- **“Global economic developments” (19% in the current survey, same compared to 6 months ago);**
- **“Internal challenges” (16% in the current survey, down 1% compared to 6 months ago), where “Human resources” are named as the most important aspect.**

“Impact of digitisation” (“Responding to customer digitisation needs”, “New digital products” or “Internal processes”), “Competition with other media” (“Internet”, “Social media”, “Virtual trade shows” or “Other”) and “Regulatory / Stakeholders issues” (“Sustainability”, “Health & safety” or “Other”) keep similar levels to the last survey.

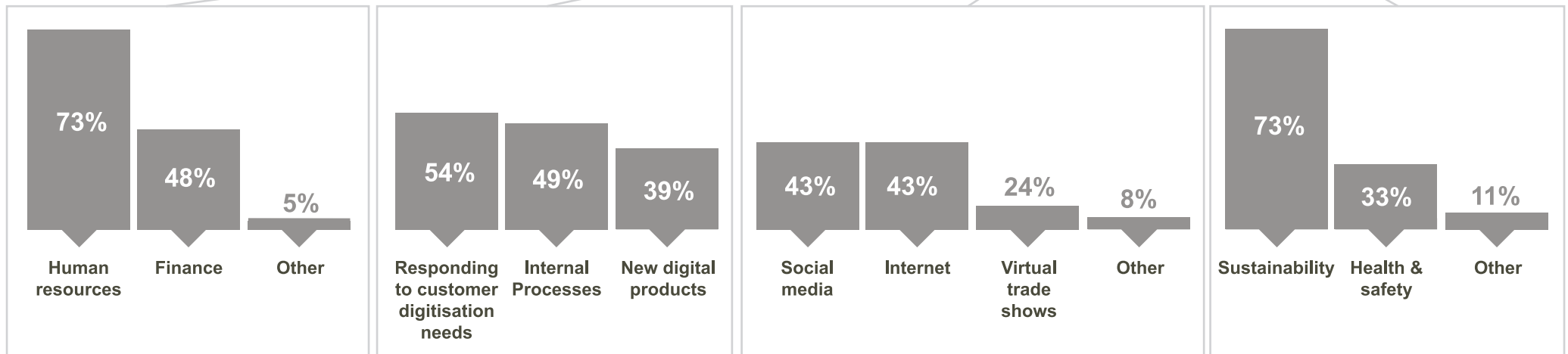
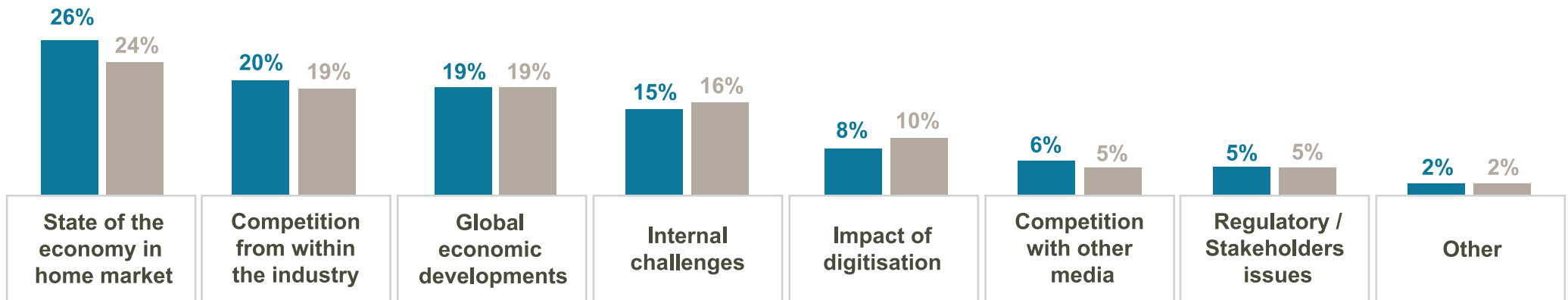
The following pages show the consolidated global results, including further insights. They also detail those results by region and by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”). The results show some differences:

- **“Internal Challenges” in Asia/Pacific, and “Global economic developments” in the Americas rank as the second most important issue, before “Competition from within the industry”.**
- **“Internal challenges” is the most important issue for venues.**

# Top Issues: Global Results

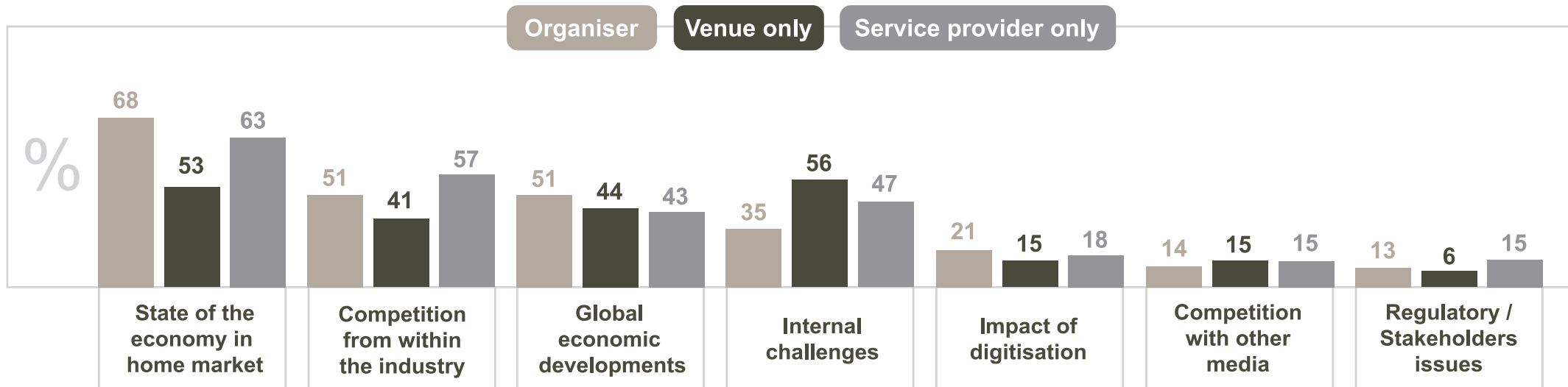
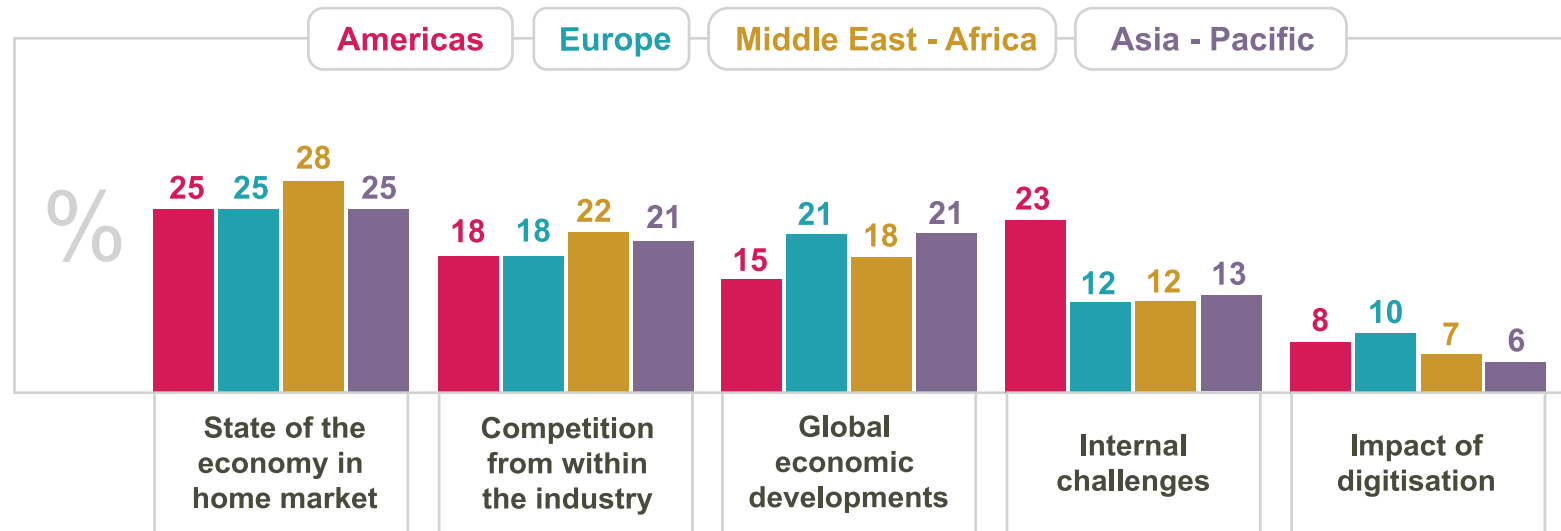
Results from current survey – January 2020

Results from last survey - July 2019



(multiple answers possible)

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



The business model for exhibitions is evolving, with the development of features such as conference stages on and near the show floor, open meeting spaces (places where participants can meet without prior arrangement), catering/designated food spaces, or off main site events.

The 24th Global Barometer survey questioned companies in order to assess the levels of implementation of these features, and the share of available space used for them.

The global and regional results are presented in the next five pages, whereas several detailed results are provided in the country profiles section of the report. These questions were primarily targeting exhibition organisers and not all survey respondents answered them. Still, the number of answers received (more than 200 for both) represents a good sample of global and regional results (see footnote).

**Results indicate a major use of “conference stages on and near the show floor” (3.6 out of a scale of 5), followed by “open meeting spaces” (2.9) and “catering/designated food spaces” (2.8). “Off main site events” are, in comparison, less often implemented (2.0).**

Among all the zones where the level of answers was considered sufficient, implementation rates significantly higher than the global average were identified:

- For “conference stages on and near the show floor”: in USA (4.3), Germany (4.0) and UAE (4.0)
- For “open meeting spaces”: UAE (3.9), Japan (3.3), Thailand (3.3), USA (3.3) and UK (3.3)
- For “catering/designated food spaces”: India (3.5), Italy (3.5) and Russia (3.4)
- For “Off main site events”: UAE (4.0) and China (2.5).

**Results also indicate that these features occupy on average less than 10% of the total space of the exhibitions. This is the case for:**

- **91% of companies for “catering/designated food spaces”**
- **88% for “off main site events”**
- **80% for “open meeting spaces”**
- **62% for “conference stages on and near the show floor”.**

Among all the zones where the level of answers was considered sufficient, the following countries appear to allocate more than 10% of their total event space to the respective features:

- for “conference stages on and near the show floor”: China (64% of companies), UAE (63%) and Australia (55%)
- for “open meeting spaces”: Thailand (63% of companies) and Japan (33%)
- for “catering/designated food spaces”: Thailand (33%), Italy (20%) and Australia (15%)
- for “off main site events”: Thailand (40%)

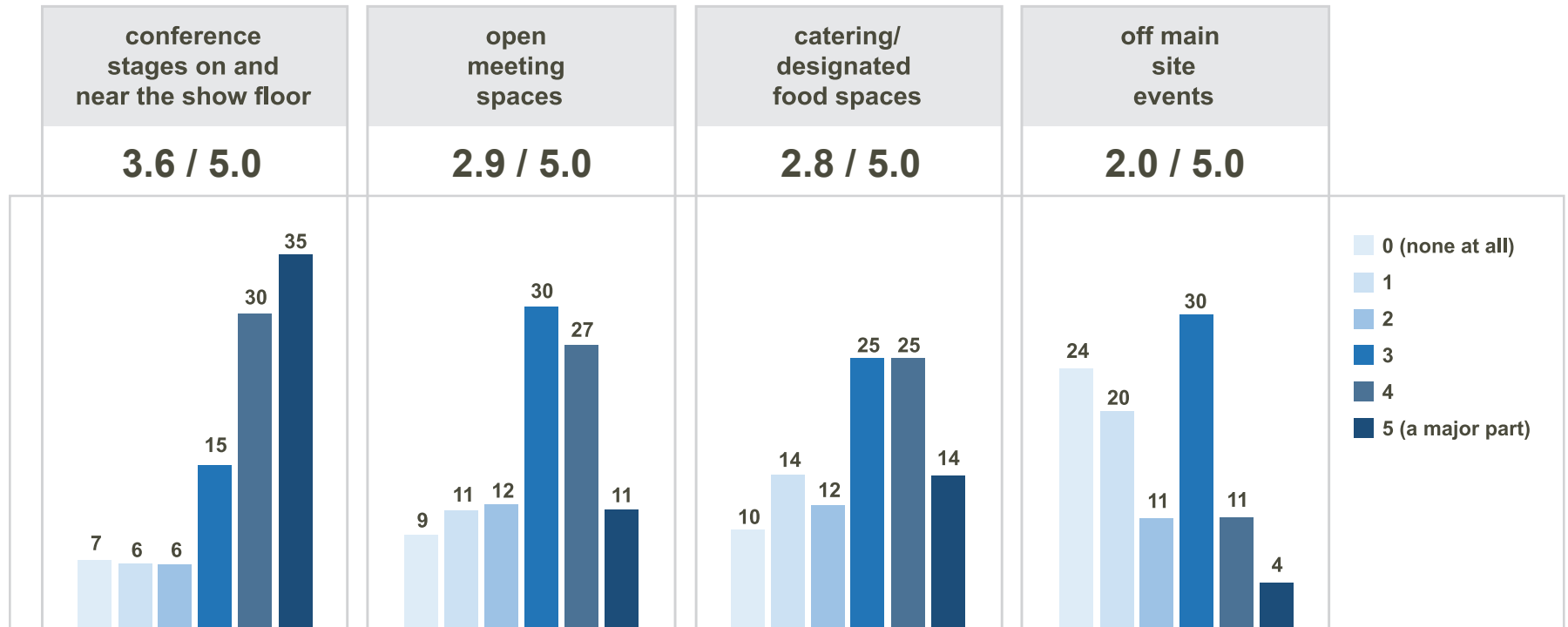
**Footnote:** Results were not considered representative for a few countries where regional results are shown instead (see respective pages).

# Evolution of the Business Model for Exhibitions

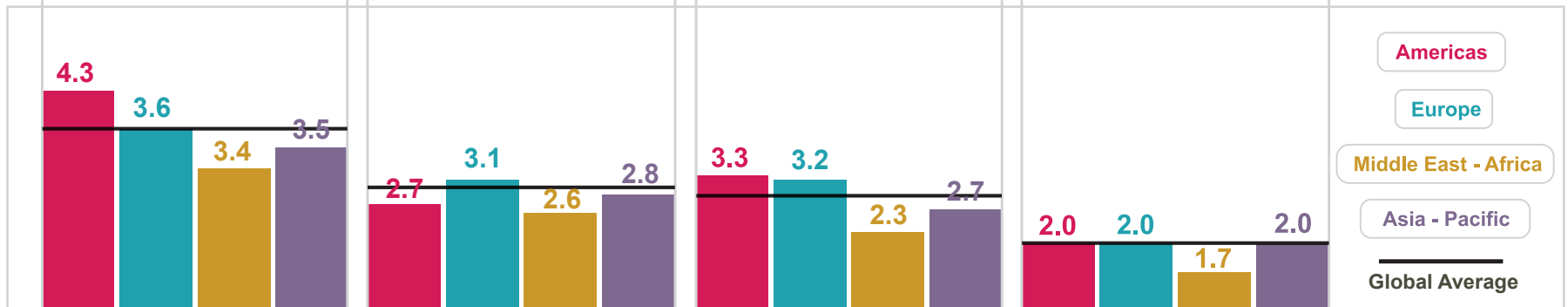
To what degree have you added the following elements to your shows

Global

%



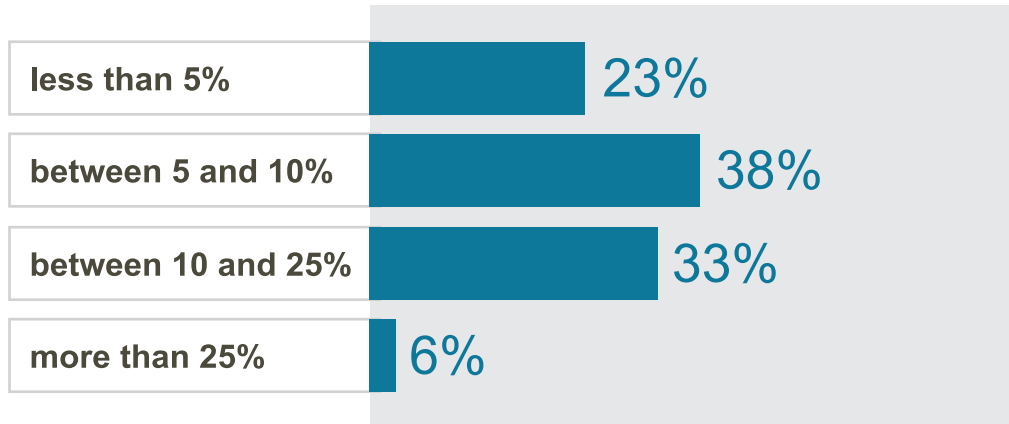
By Region



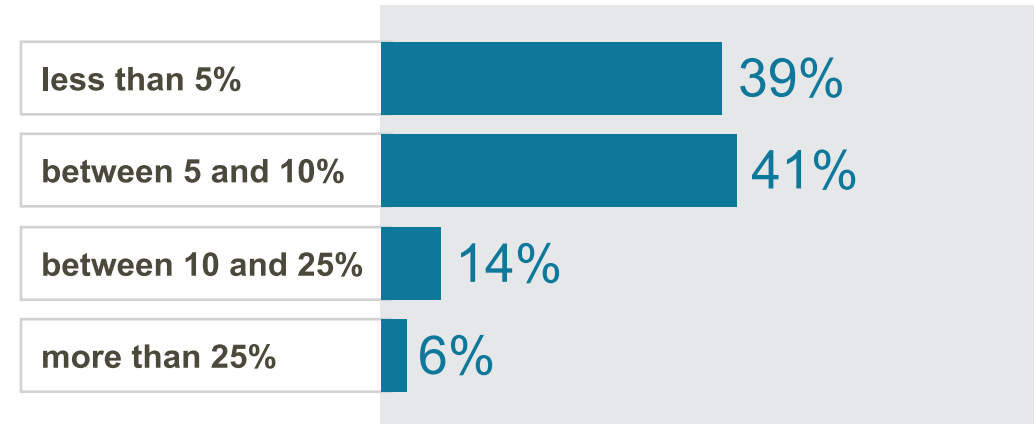
What share of your total space available is used for the respective purposes during your exhibitions?

Global

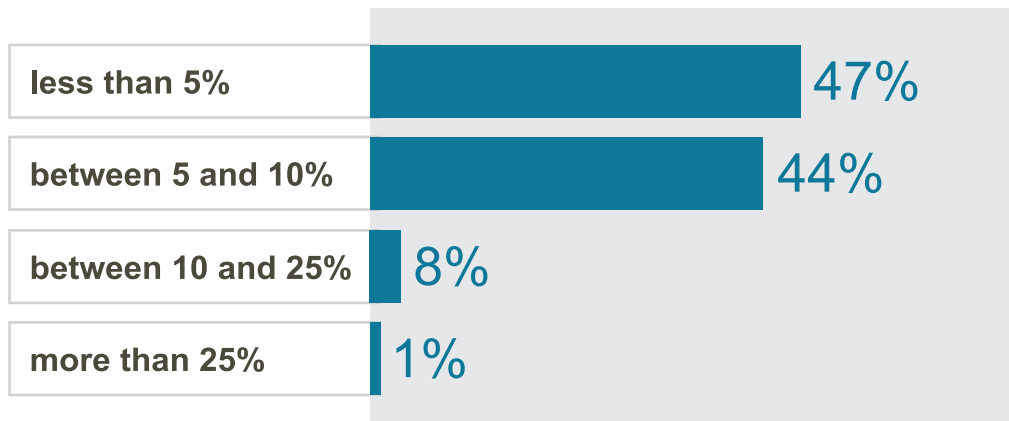
## Conference stages on and near the show floor



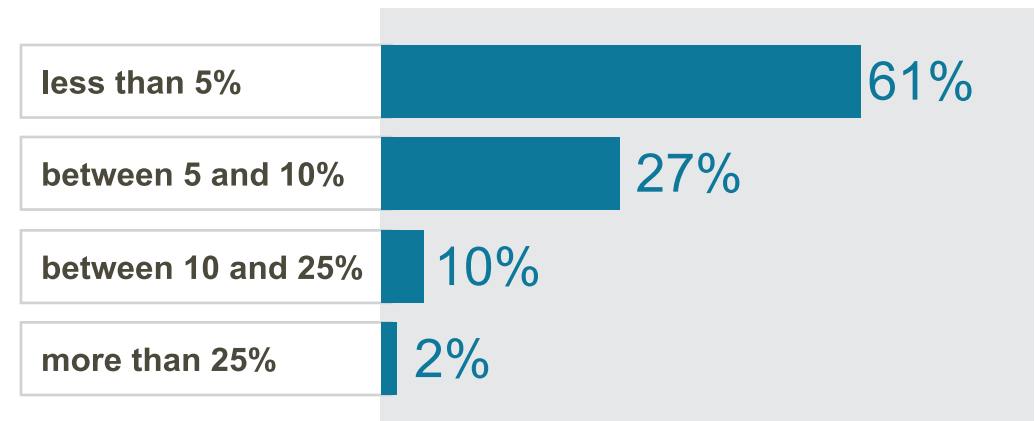
## Open meeting spaces



## Catering / designated food spaces



## Off main site events

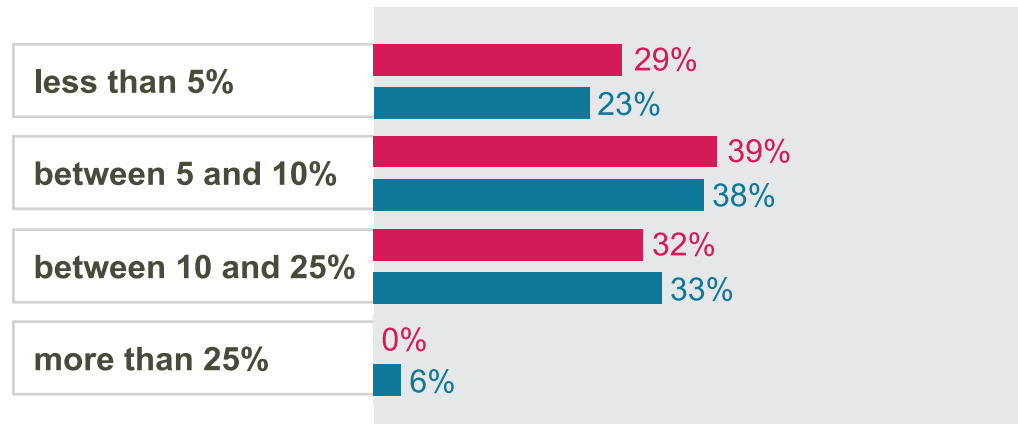


What share of your total space available is used for the respective purposes during your exhibitions?

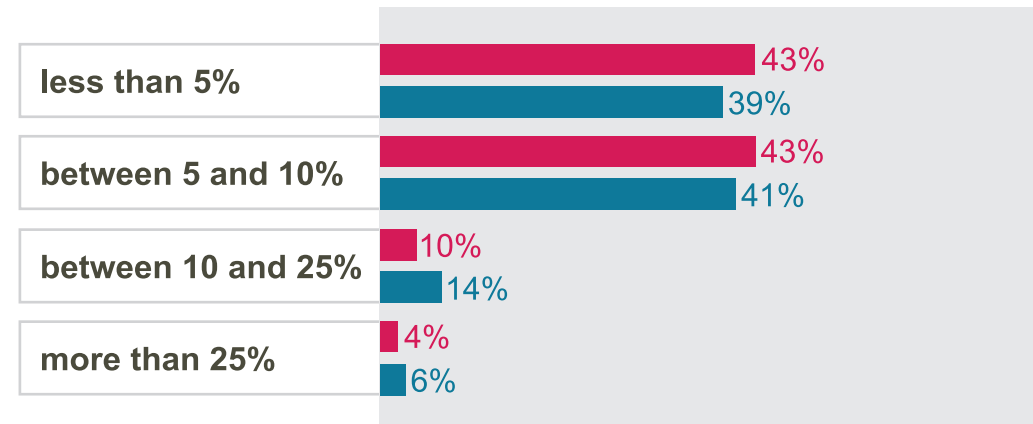
Americas

Global

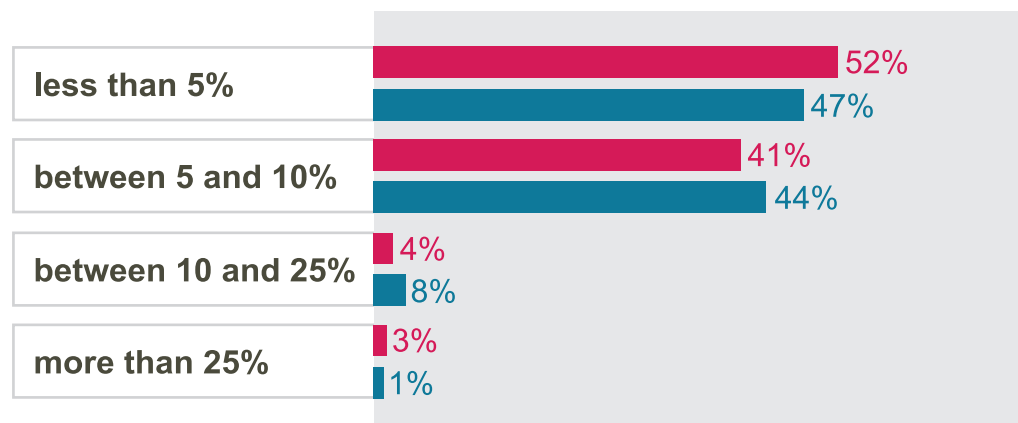
## Conference stages on and near the show floor



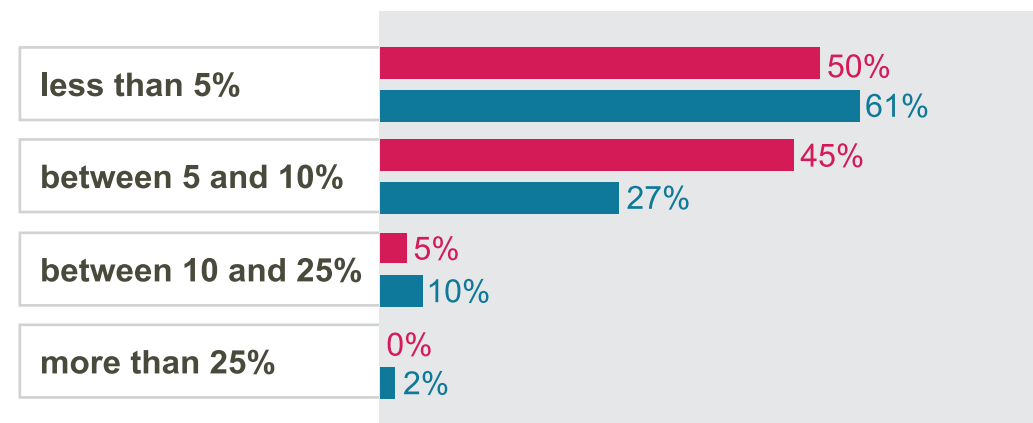
## Open meeting spaces



## Catering / designated food spaces



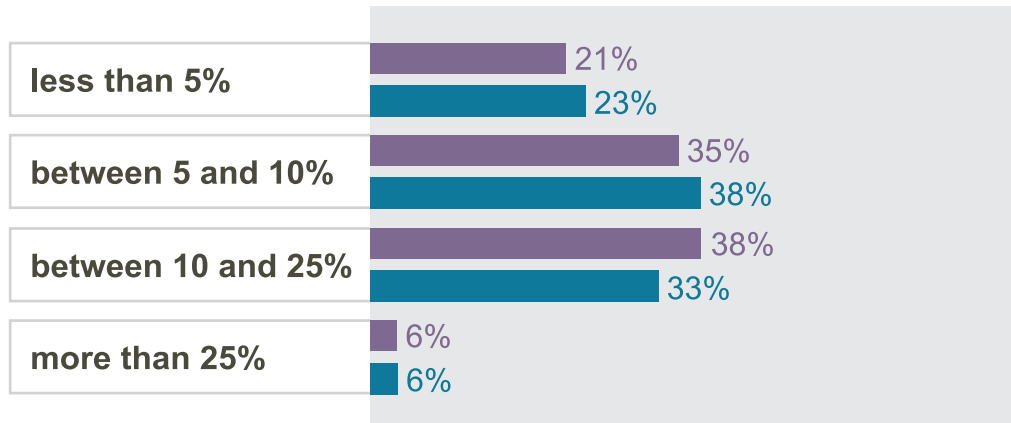
## Off main site events



What share of your total space available is used for the respective purposes during your exhibitions?

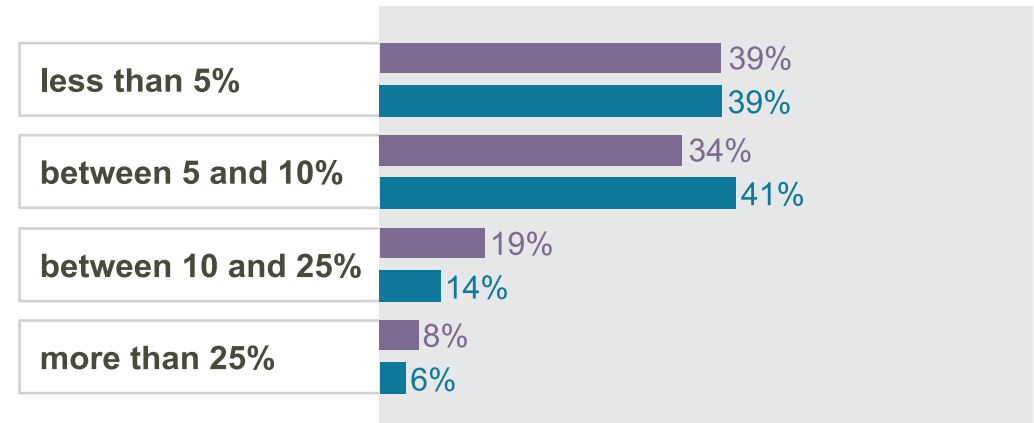
Asia - Pacific

## Conference stages on and near the show floor

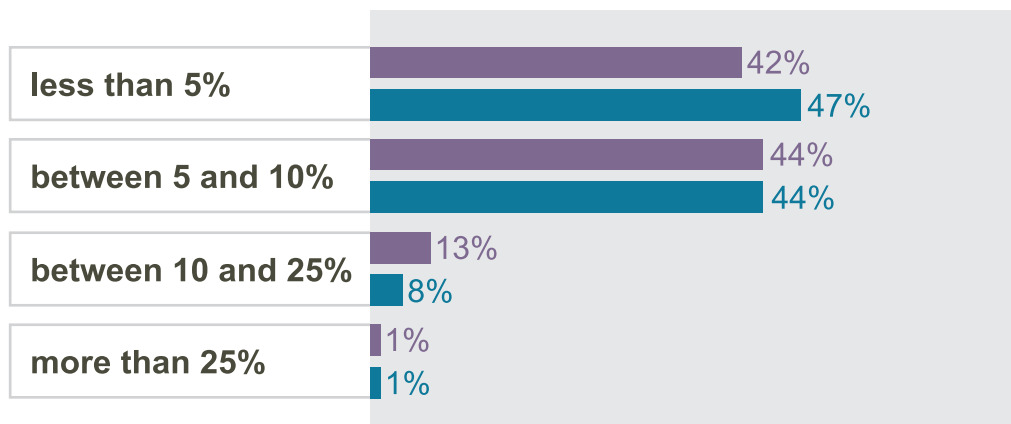


## Open meeting spaces

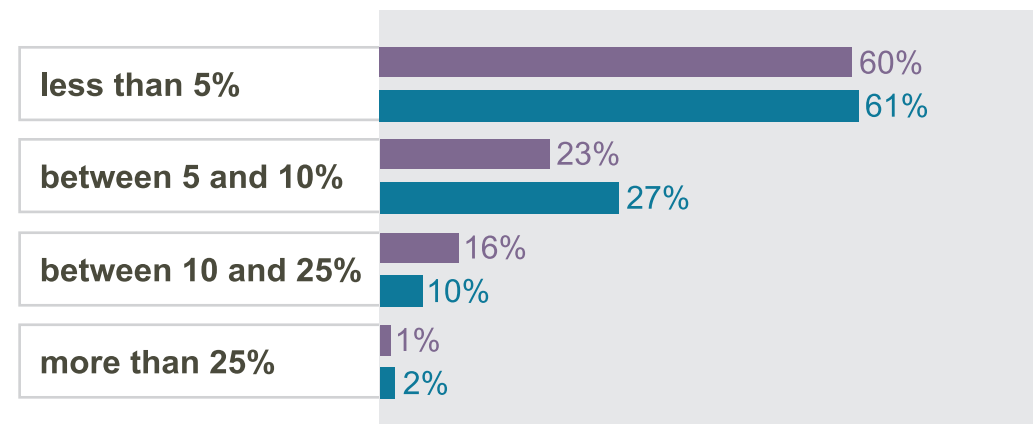
Global



## Catering / designated food spaces



## Off main site events



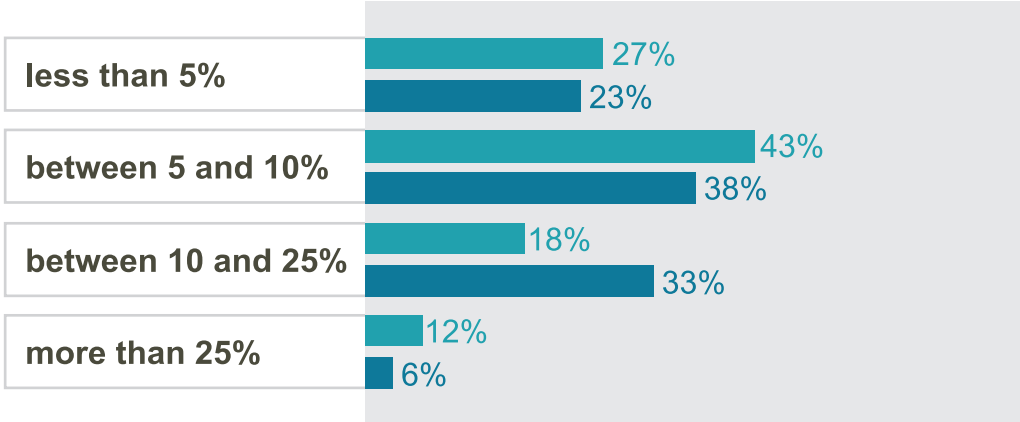


What share of your total space available is used for the respective purposes during your exhibitions?

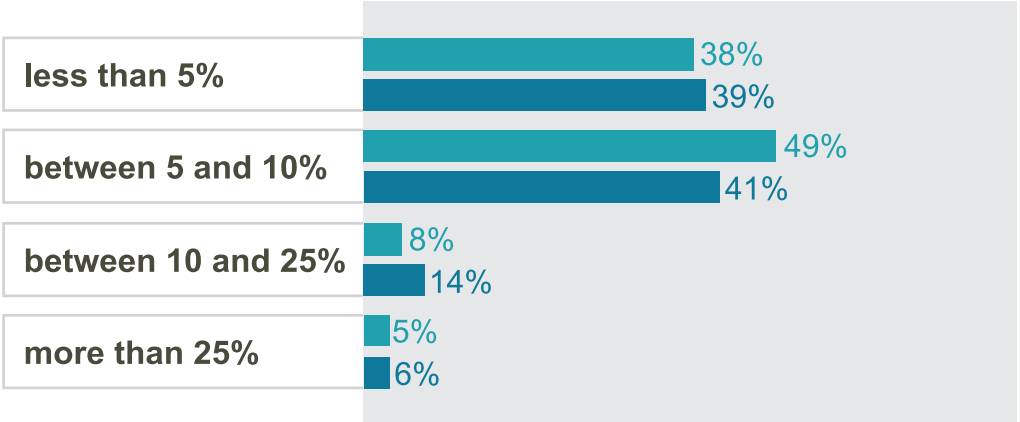
Europe

Global

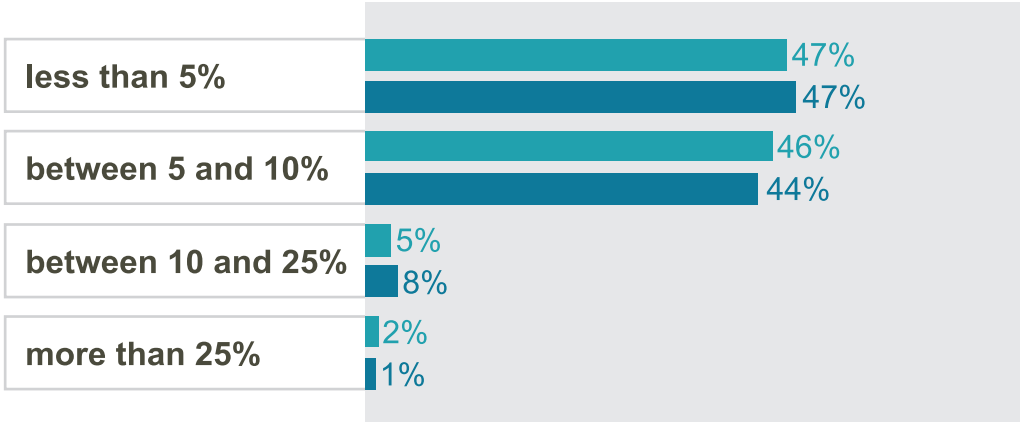
### Conference stages on and near the show floor



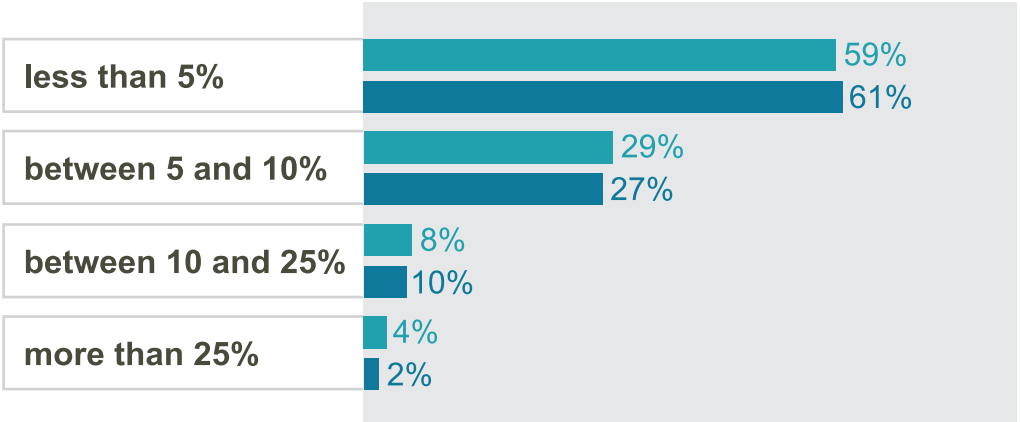
### Open meeting spaces



### Catering / designated food spaces



### Off main site events

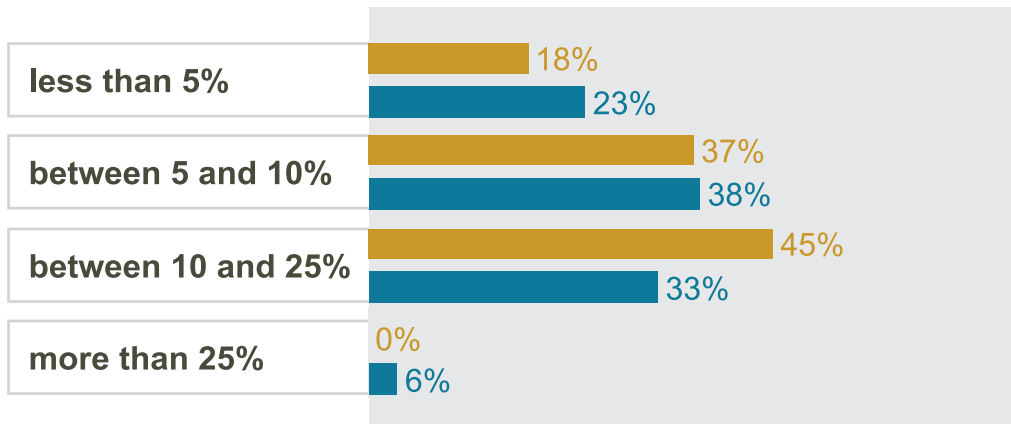


What share of your total space available is used for the respective purposes during your exhibitions?

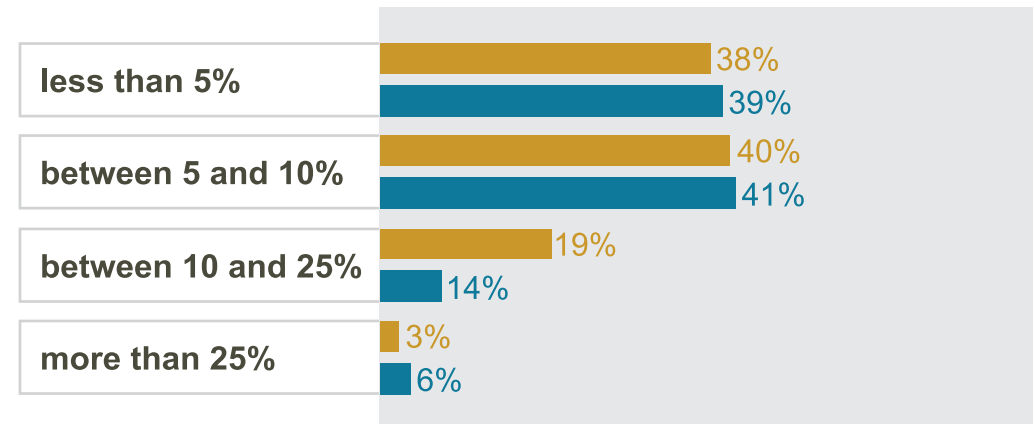
Middle East - Africa

Global

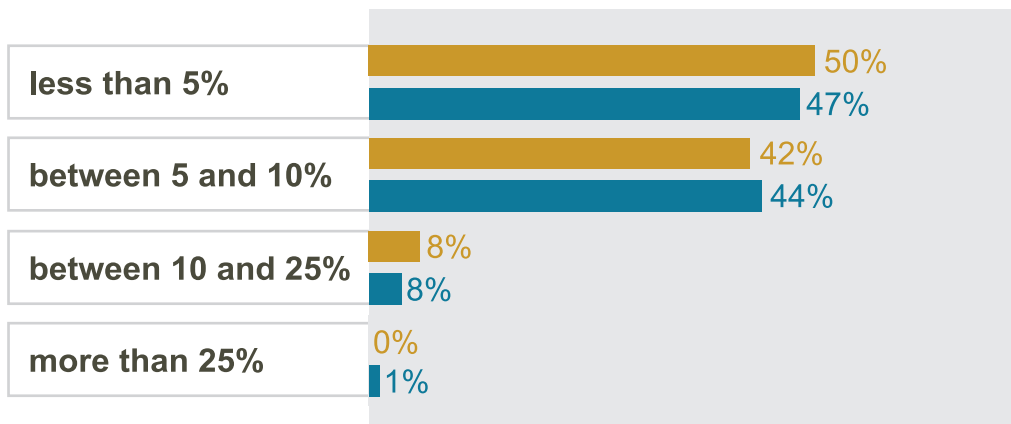
## Conference stages on and near the show floor



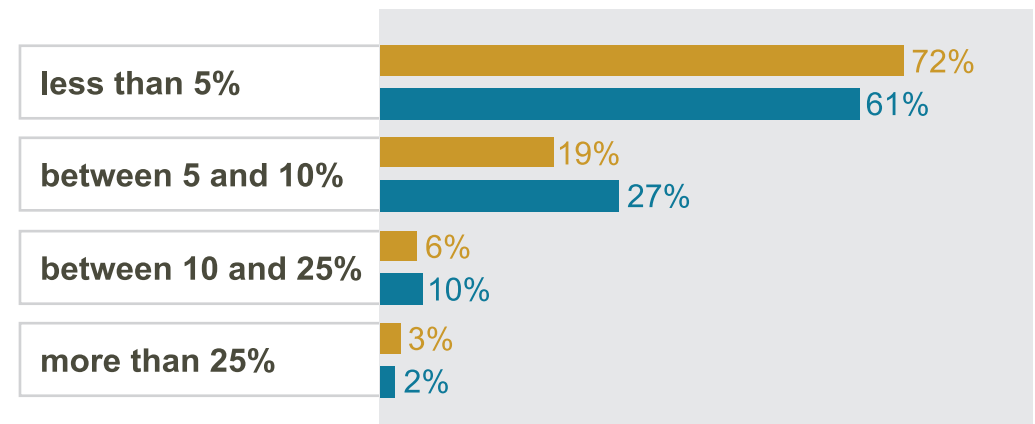
## Open meeting spaces



## Catering / designated food spaces



## Off main site events



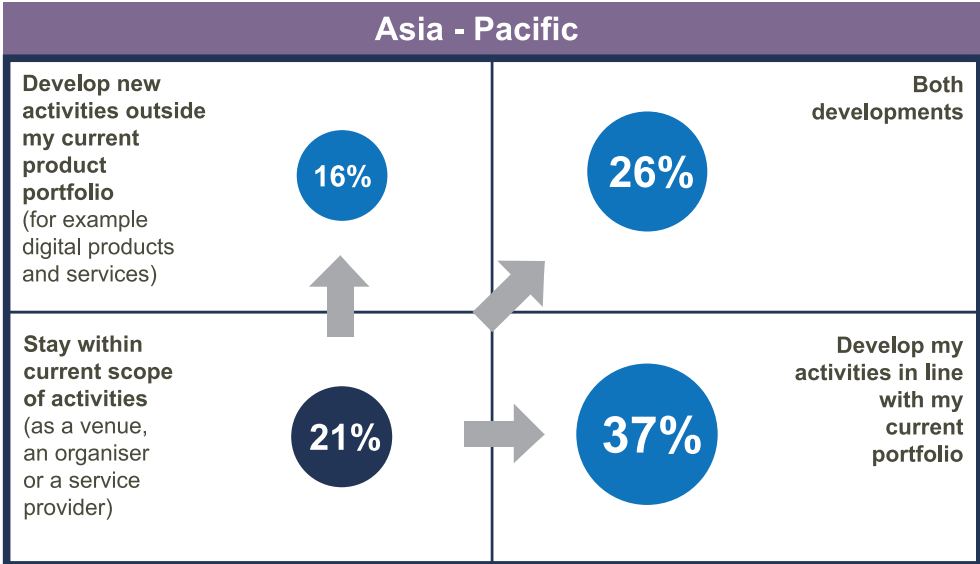
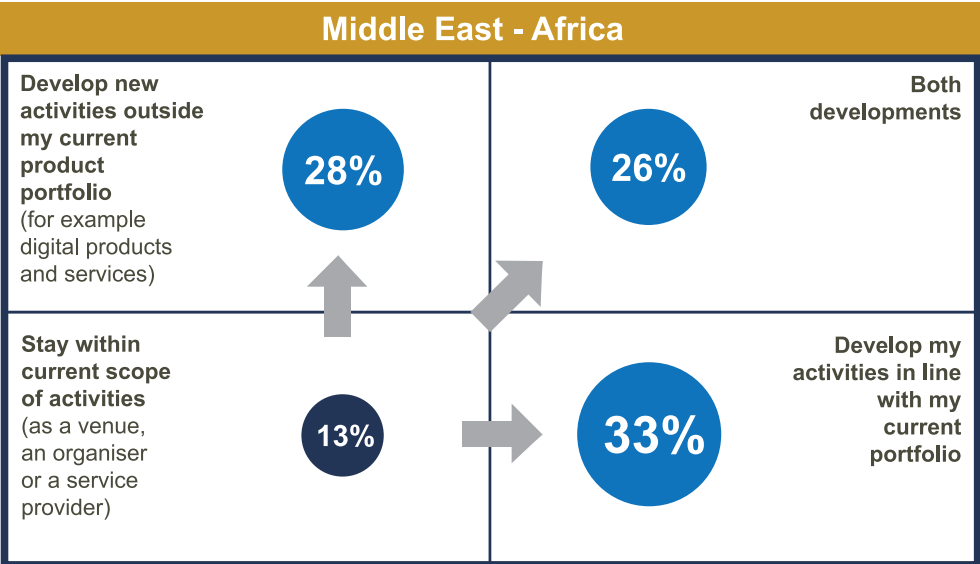
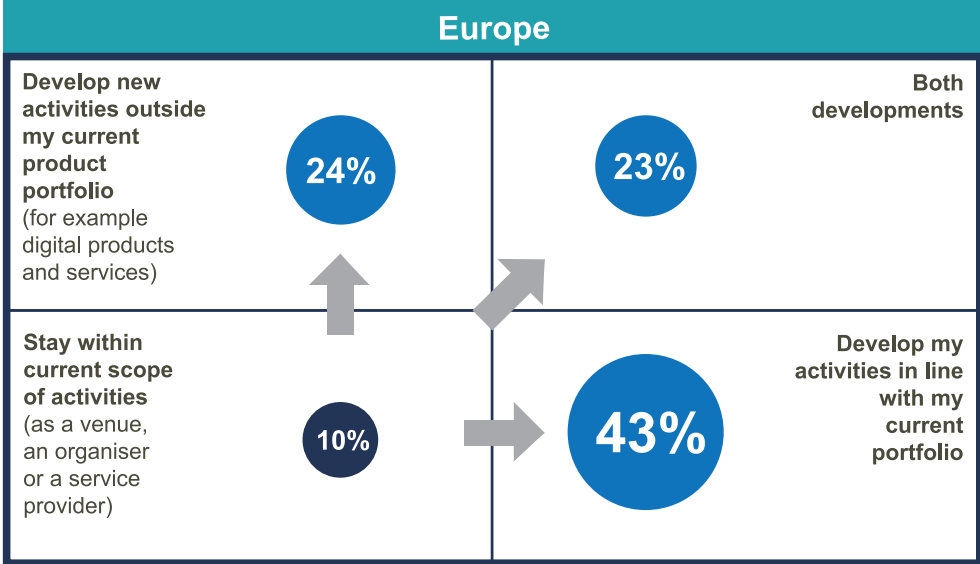
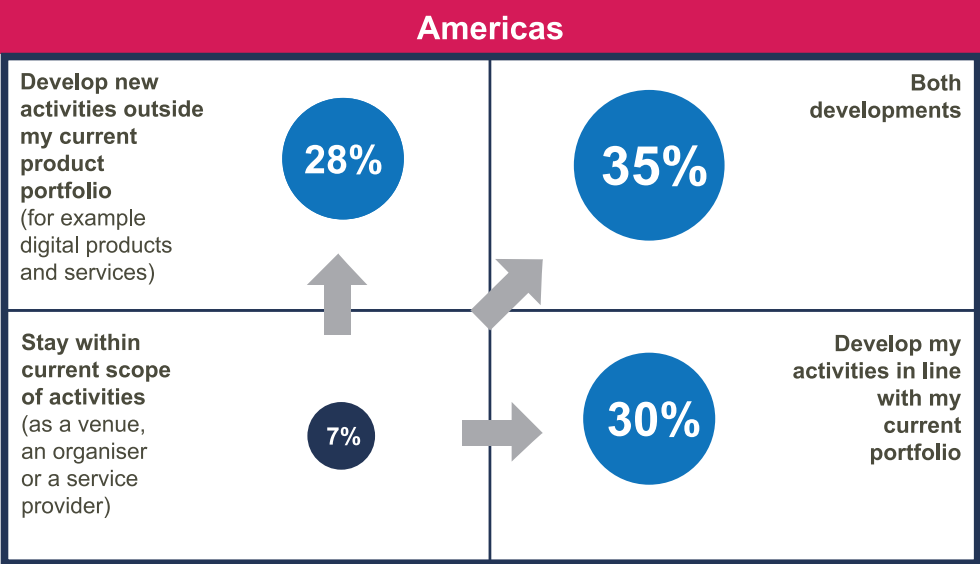
Companies were asked to share their current priorities in terms of strategy in two specific areas: their range of activities and their geographical exposure.

In all regions, a large majority of companies intend to develop new activities, in either the classic range of exhibition industry activities (venue/organiser/services), or outside of the current product portfolios, or in both: 79% in Asia/Pacific, 87% in the Middle East & Africa, 90% in Europe and 93% in the Americas.

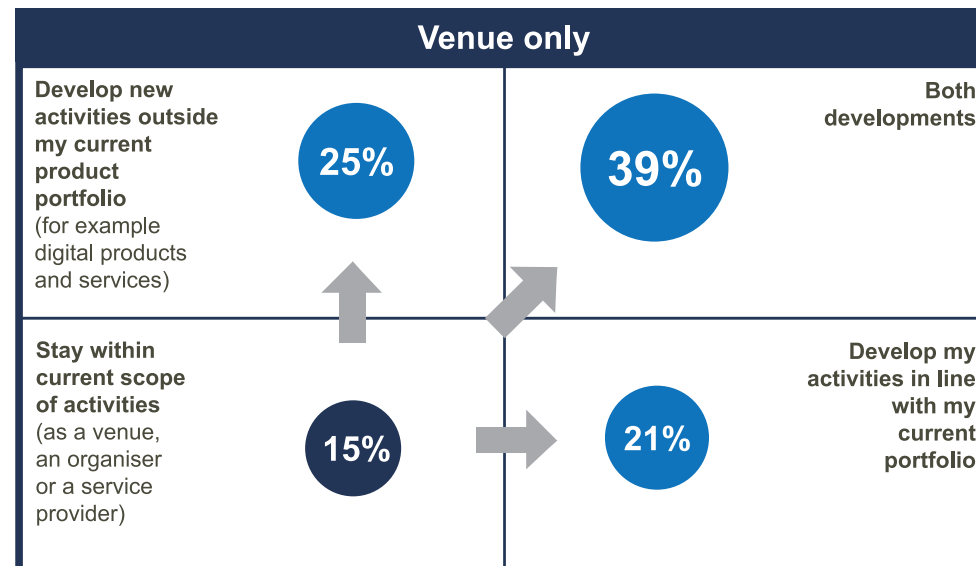
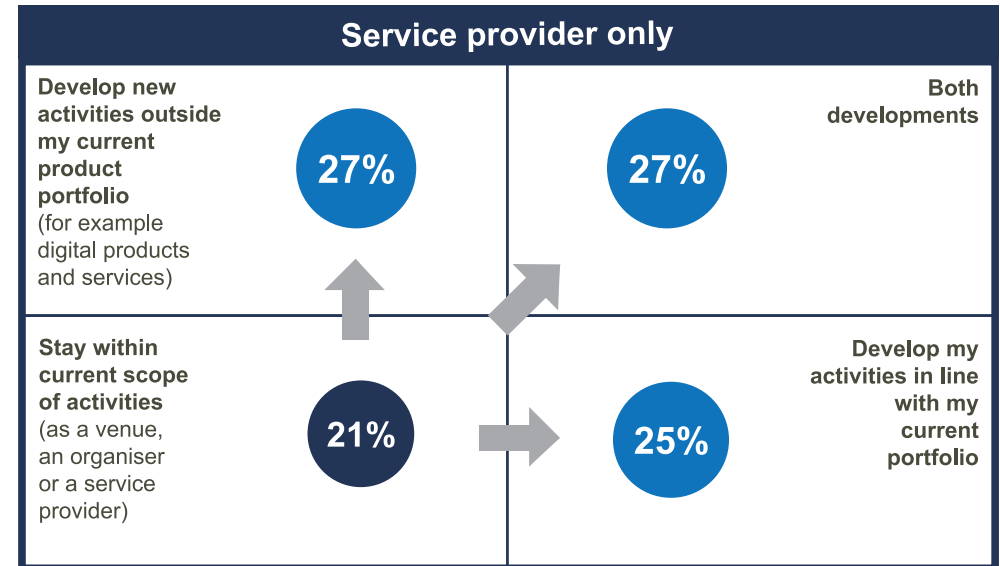
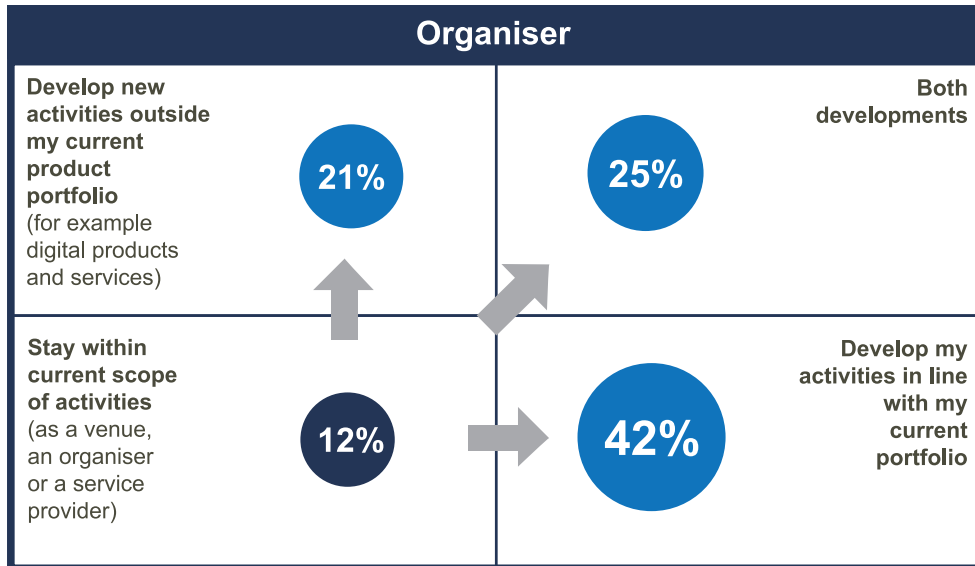
In terms of geographical expansion, 36% of companies on average declare an intention to develop operations in new countries, and this is the case for a majority of companies in 7 of the 22 markets analysed: Germany (73%), the UK (73%), South Africa (64%), “other countries of Middle East” (56%), Brazil (50%), Italy (50%) and USA (50%).

These results are also detailed in the following pages for the main segments of “company type” (“Organiser”, “Venue only” and “Service Provider only”).

# Current strategic priorities related to the range of activities: by region



# Current strategic priorities related to the range of activities: by type of activity

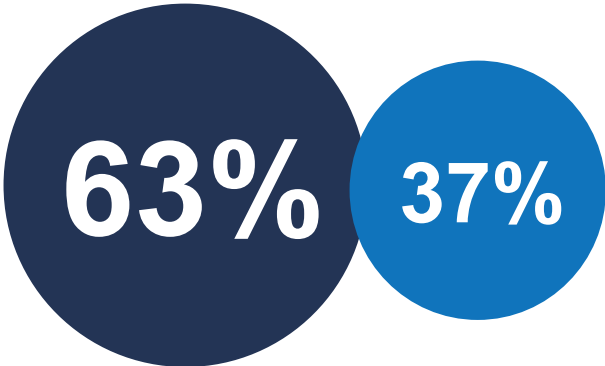


# Current strategic priorities related to geographic exposure: by region

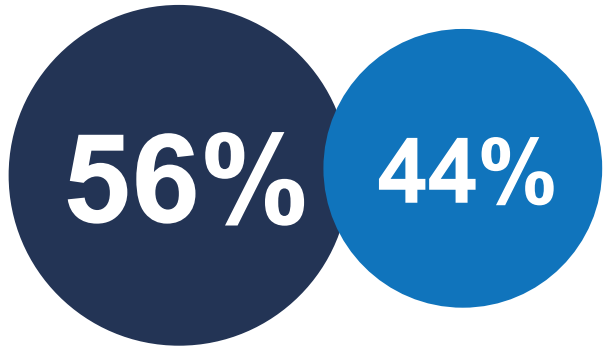
Stay in the same countries as those in which I currently operate

Operate in new countries

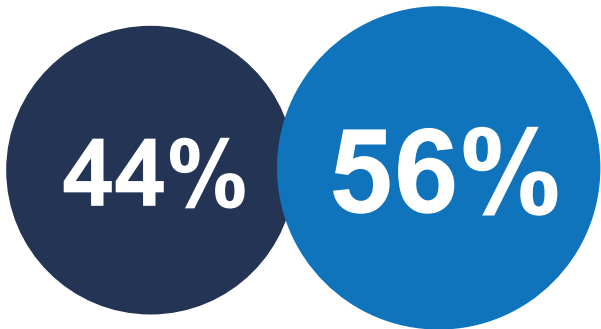
## Americas



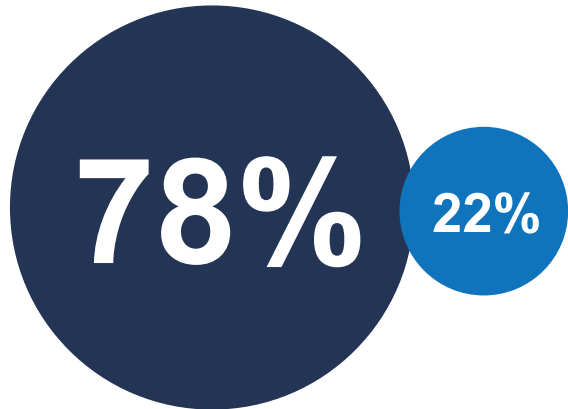
## Europe



## Middle East - Africa



## Asia - Pacific

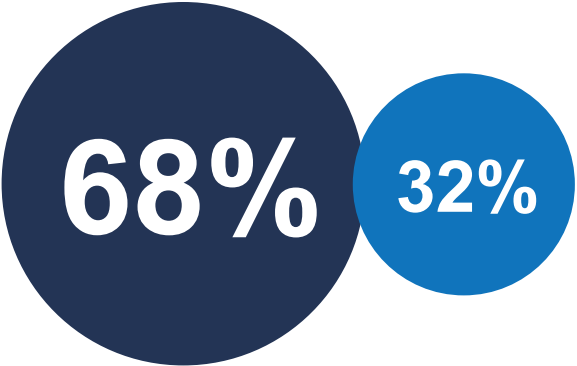


# Current strategic priorities related to geographic exposure: by type of activity

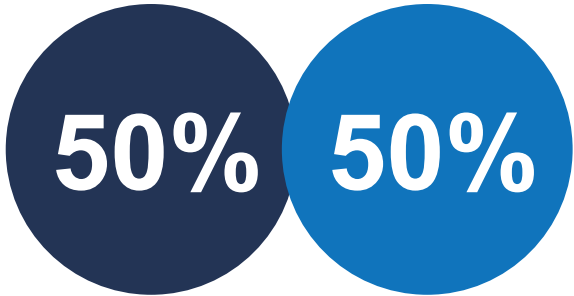
Stay in the same countries as those in which I currently operate

Operate in new countries

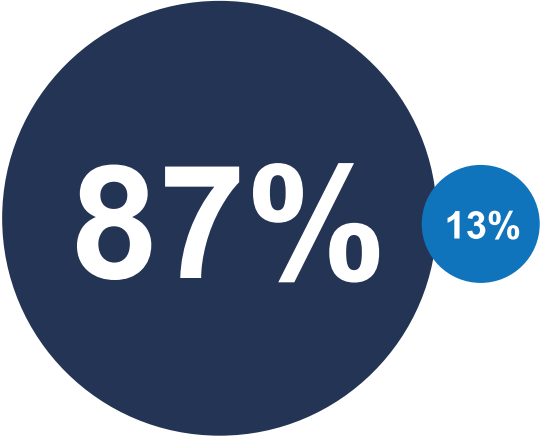
## Organiser



## Service provider only



## Venue only



# Part 2: Detailed results for 22 selected countries or zones

## North America:

Mexico  
US

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## Central and South America:

Argentina  
Brazil  
Columbia  
Other Countries in Central and South America

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## Europe:

Germany  
Italy  
Russia  
United Kingdom  
Other countries in Europe

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## Africa:

South Africa

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## Middle East:

UAE  
Other Countries in the Middle East

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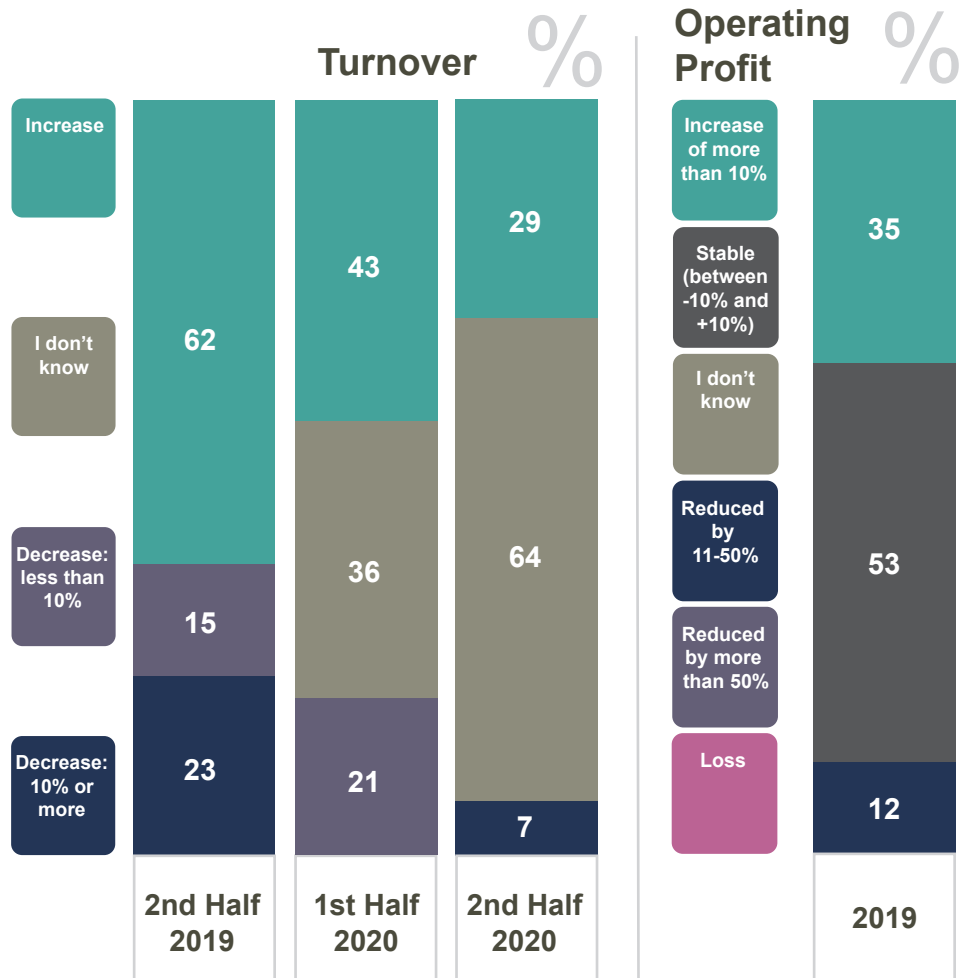
## Asia - Pacific:

Australia  
China  
India  
Indonesia  
Japan  
Macau  
Thailand  
Other countries in Asia - Pacific

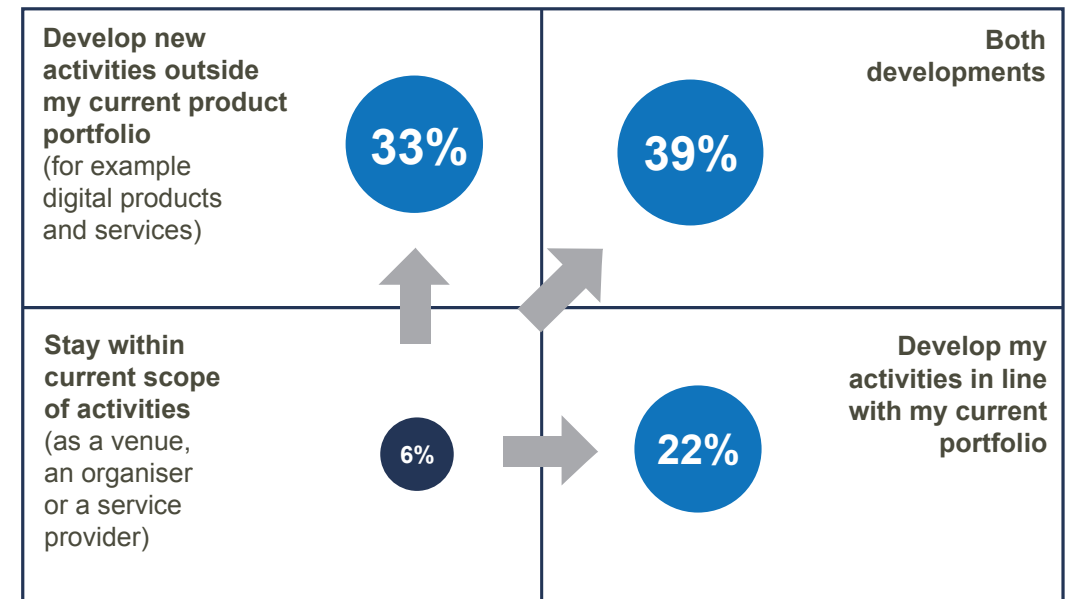




## Financial expectations of Mexican exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure



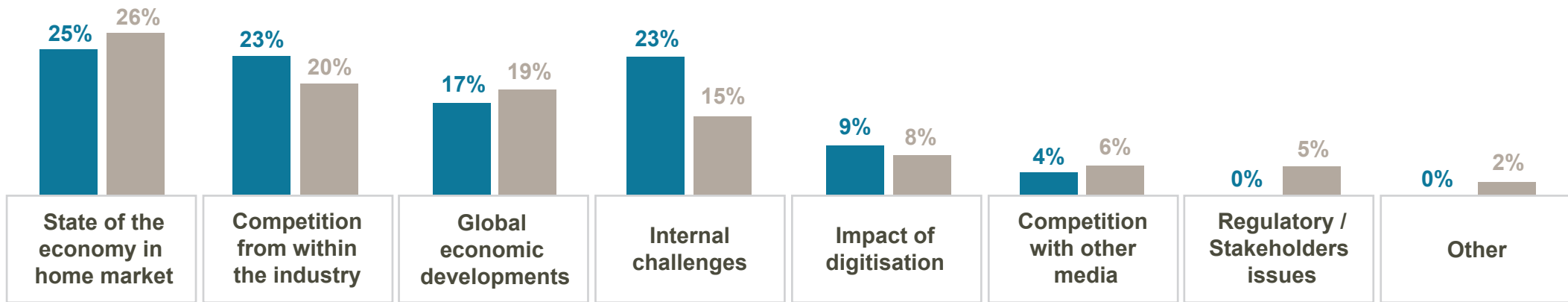
# Detailed results for Mexico



## Most important business issues in the exhibition industry in Mexico and globally

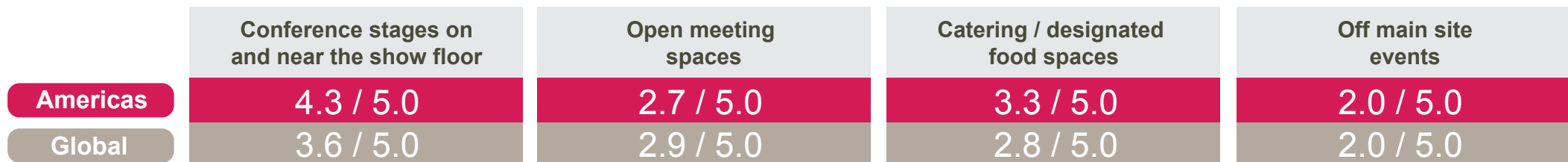
Mexico

Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

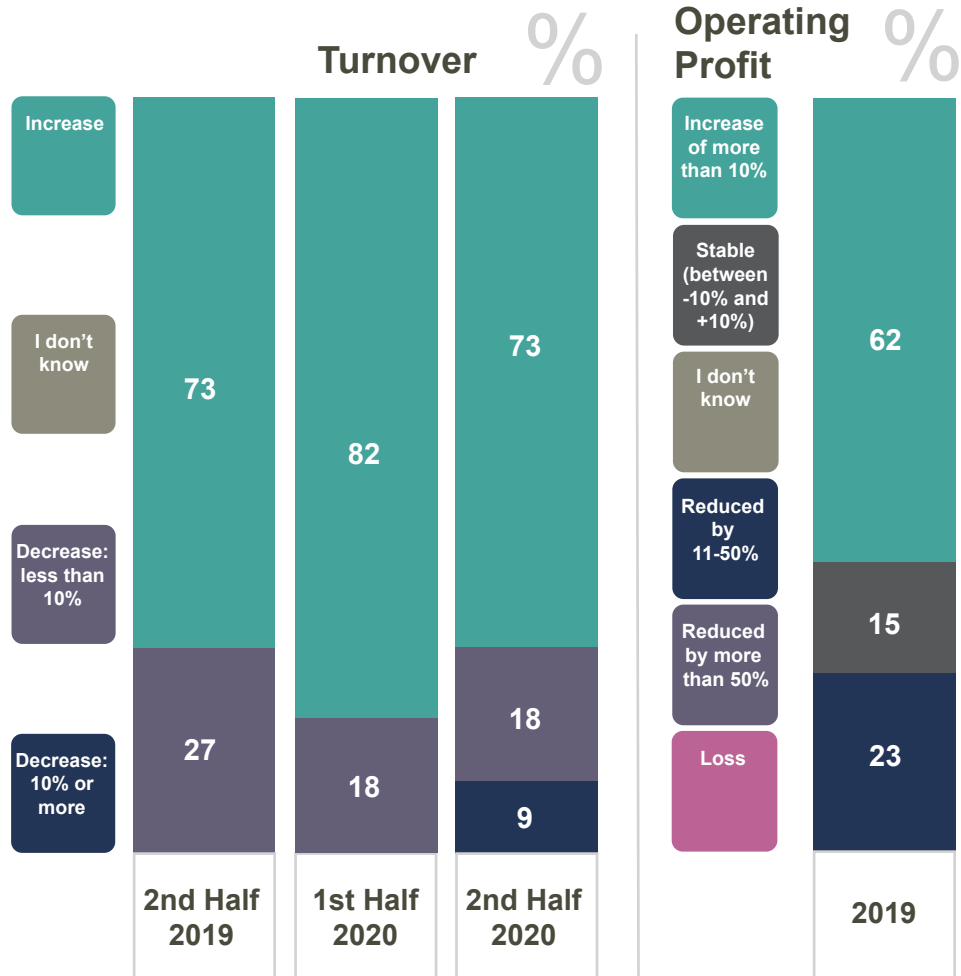


What share of your total space available is used for the respective purposes during your exhibitions?

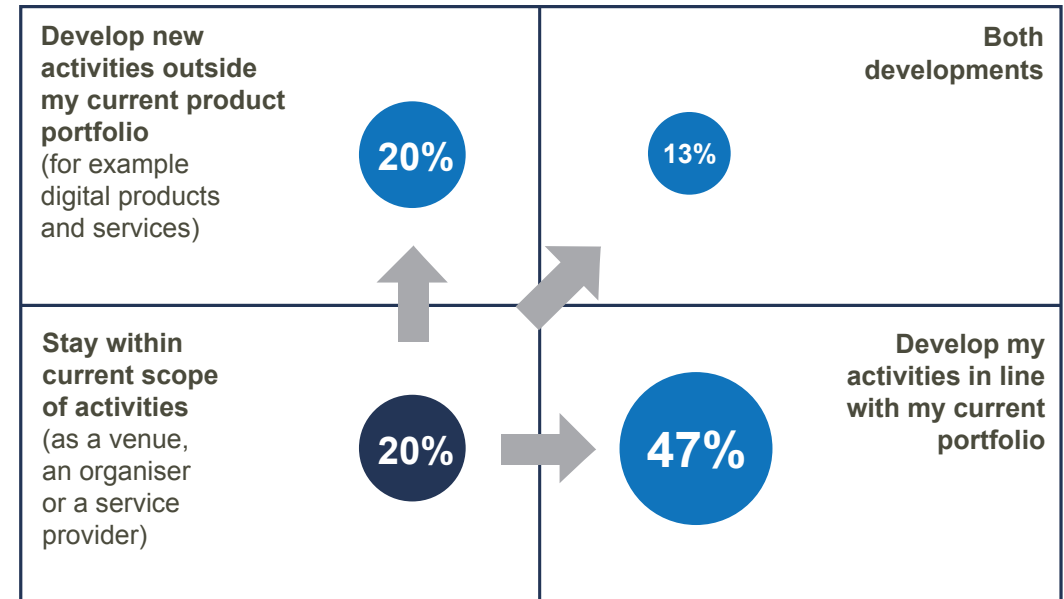




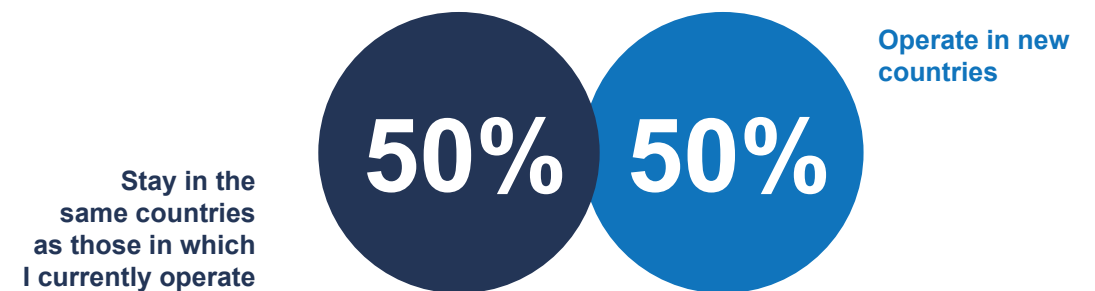
## Financial expectations of US exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



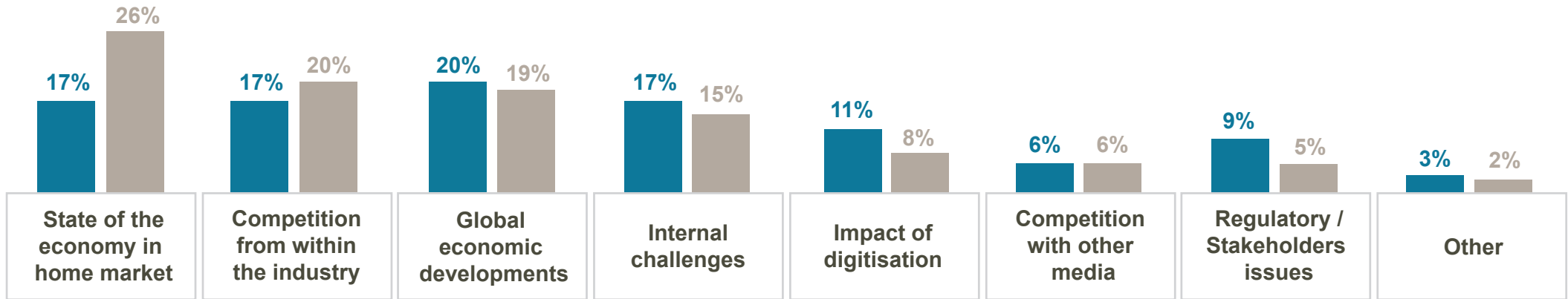
## Current strategic priorities related to geographic exposure





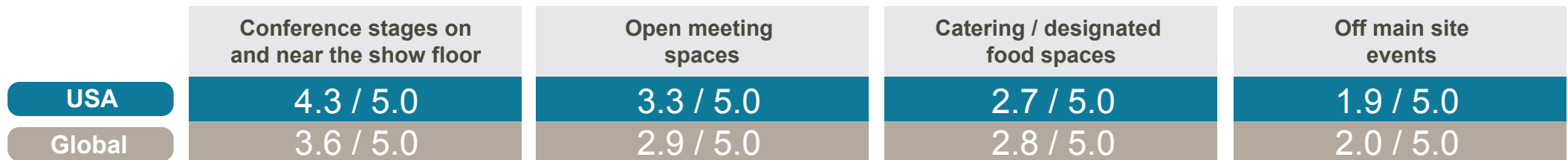
## Most important business issues in the exhibition industry in the US and globally

**USA** Global

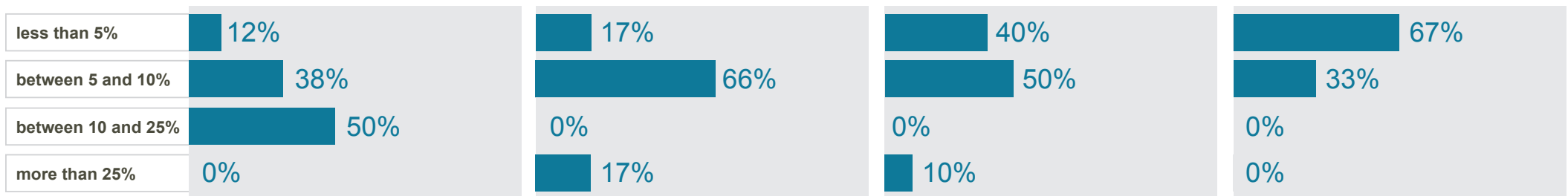


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

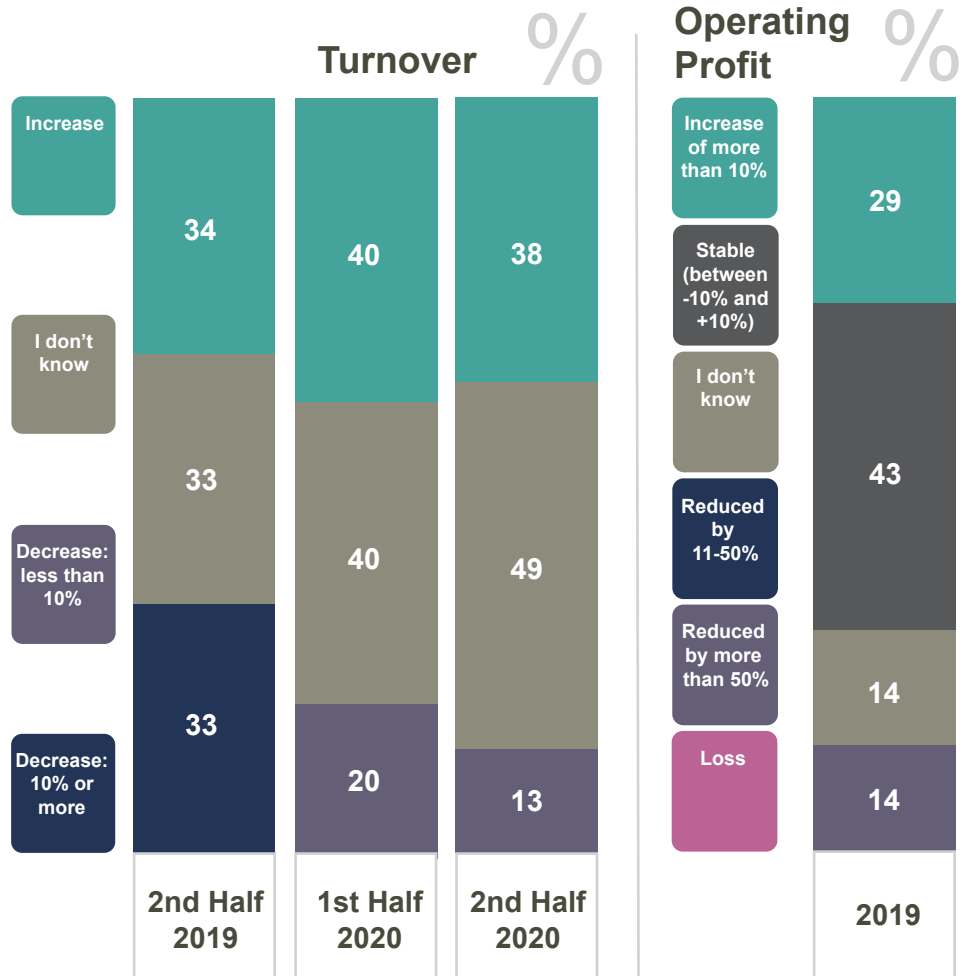


What share of your total space available is used for the respective purposes during your exhibitions?

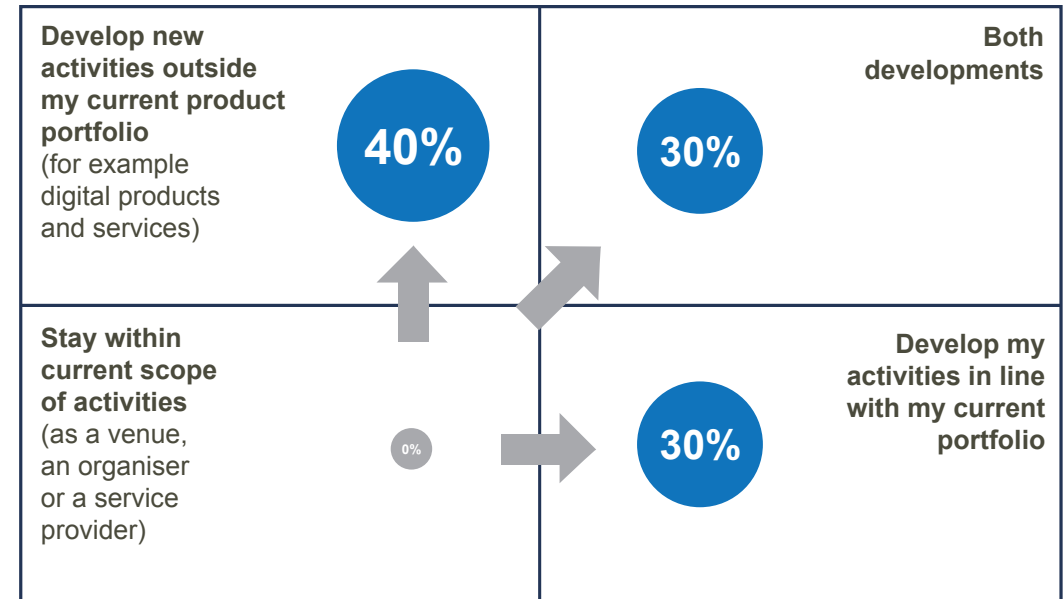




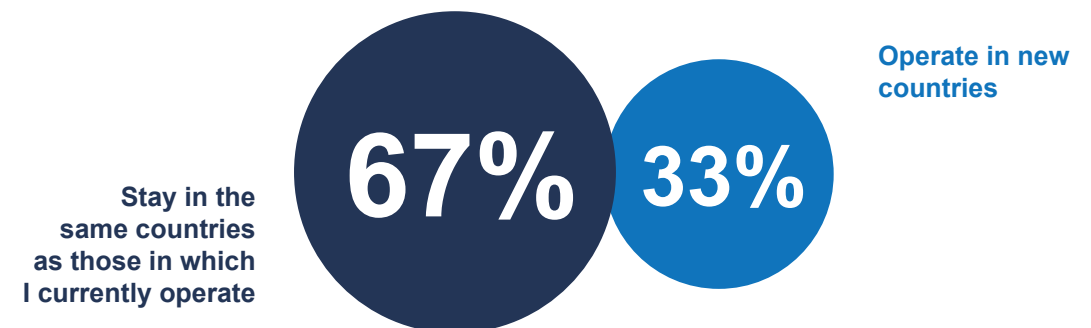
## Financial expectations of Argentinian exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

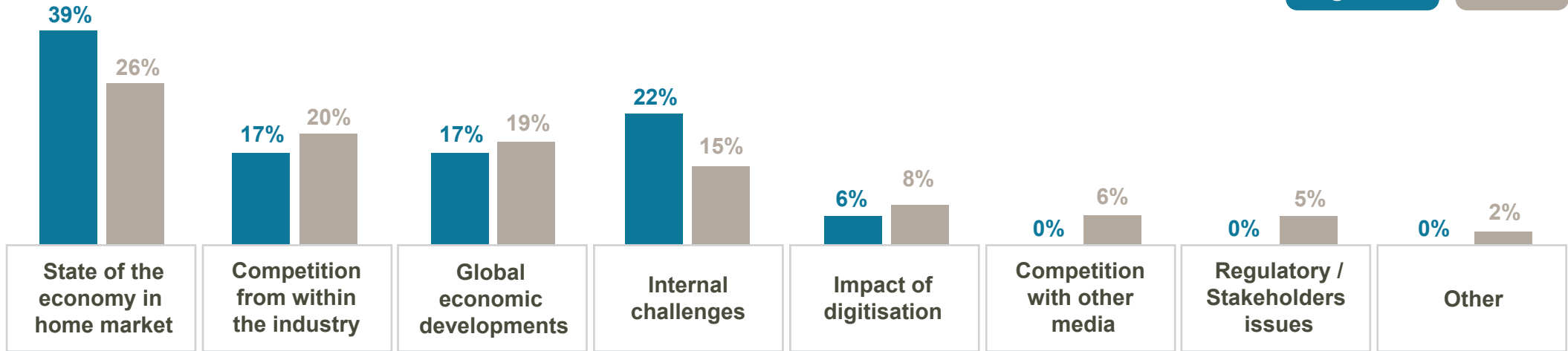


# Detailed results for Argentina



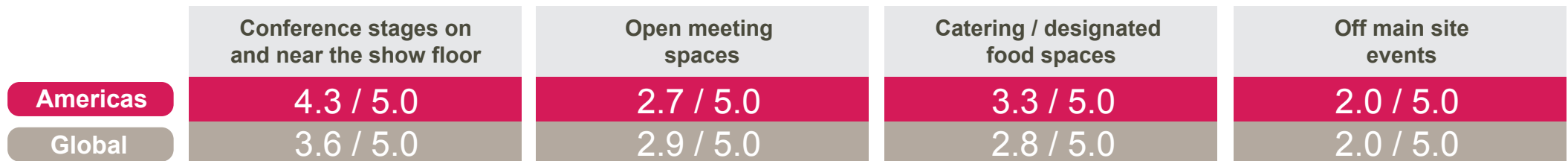
## Most important business issues in the exhibition industry in Argentina and globally

Argentina Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



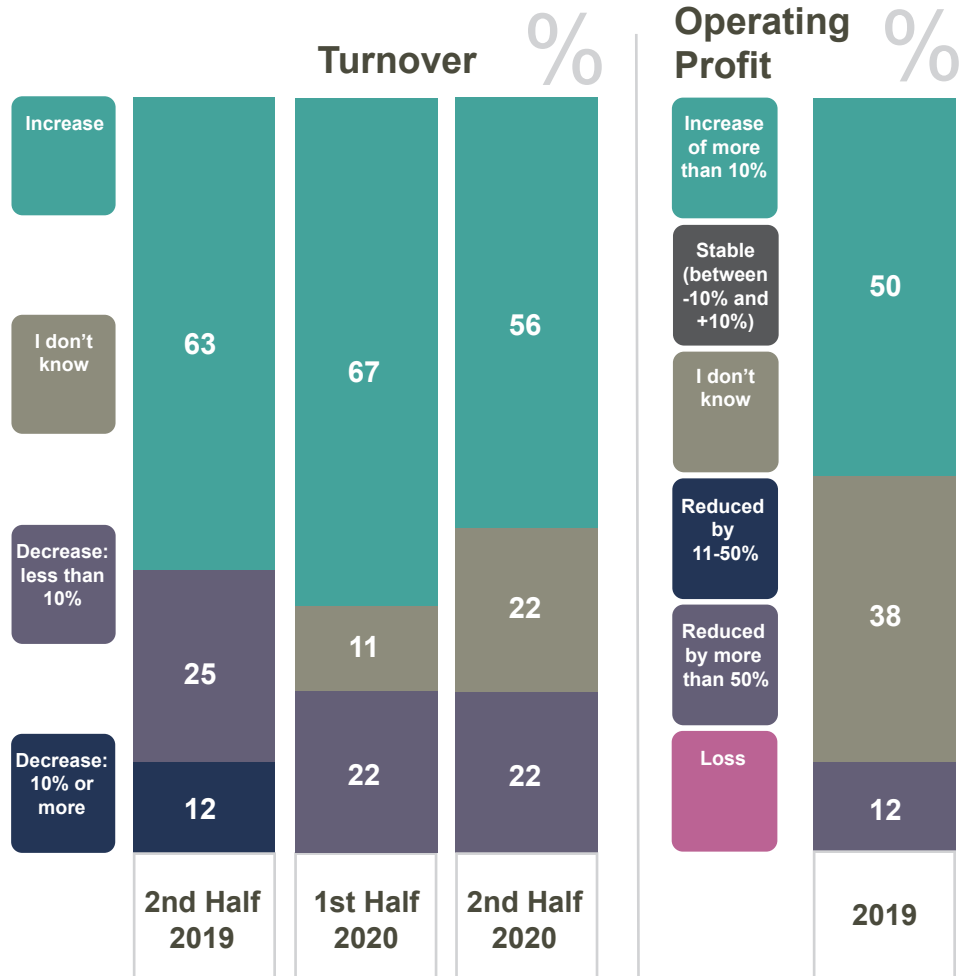
What share of your total space available is used for the respective purposes during your exhibitions?



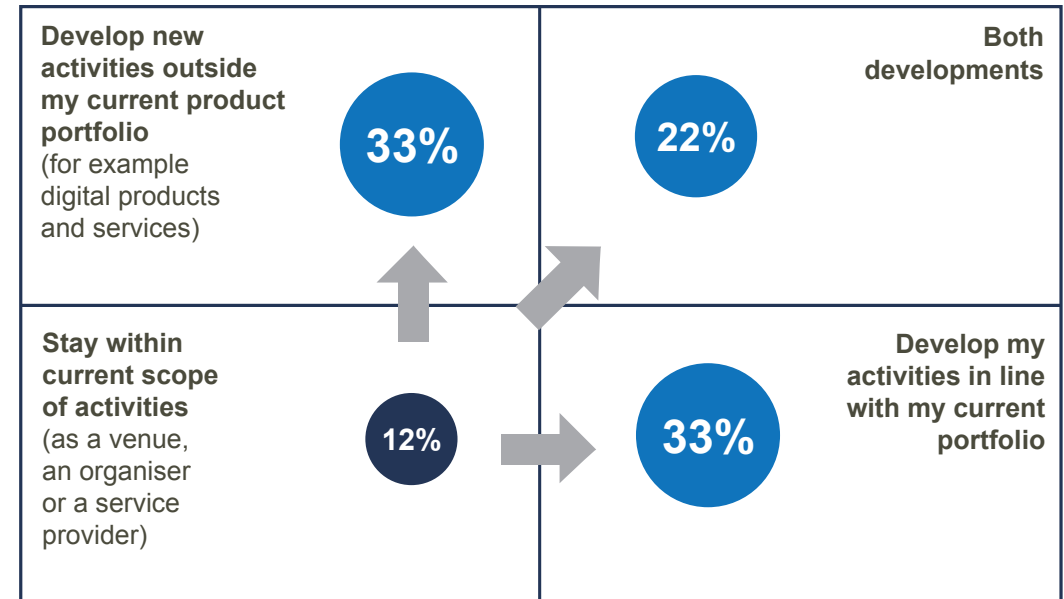
# Detailed results for Brazil



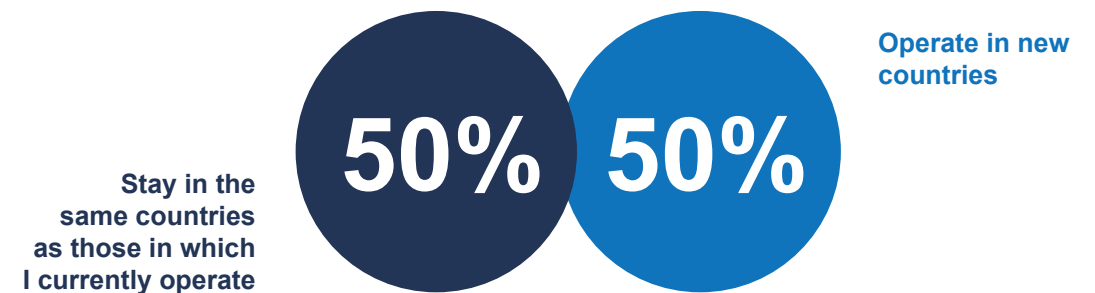
## Financial expectations of Brazilian exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

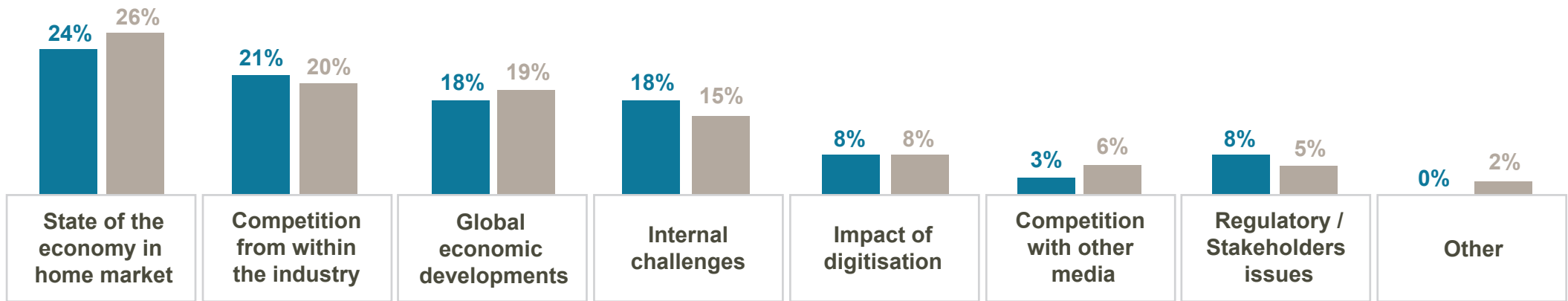


# Detailed results for Brazil



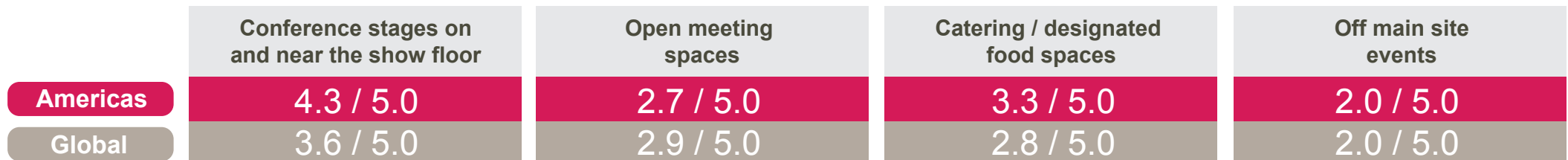
## Most important business issues in the exhibition industry in Brazil and globally

**Brazil** Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



What share of your total space available is used for the respective purposes during your exhibitions?

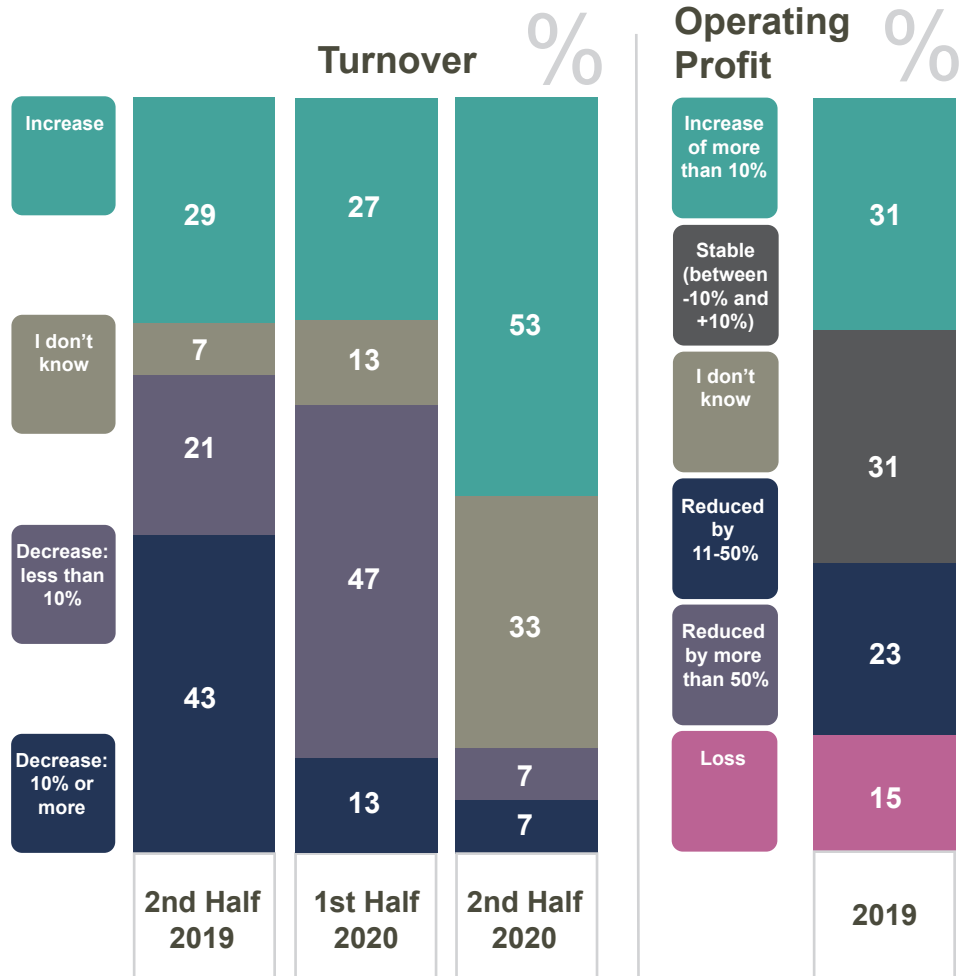




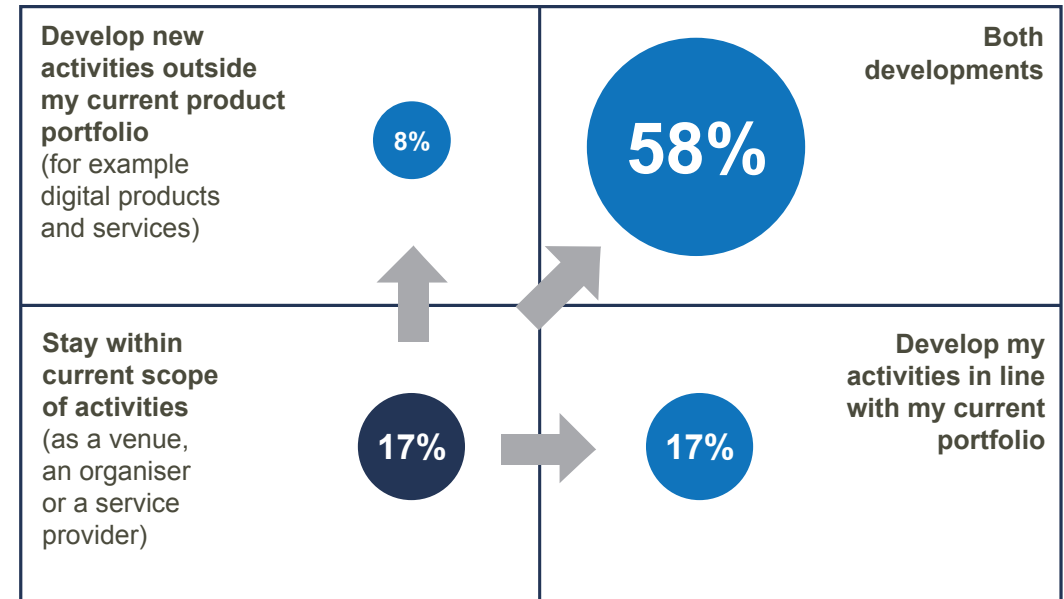
# Detailed results for Colombia



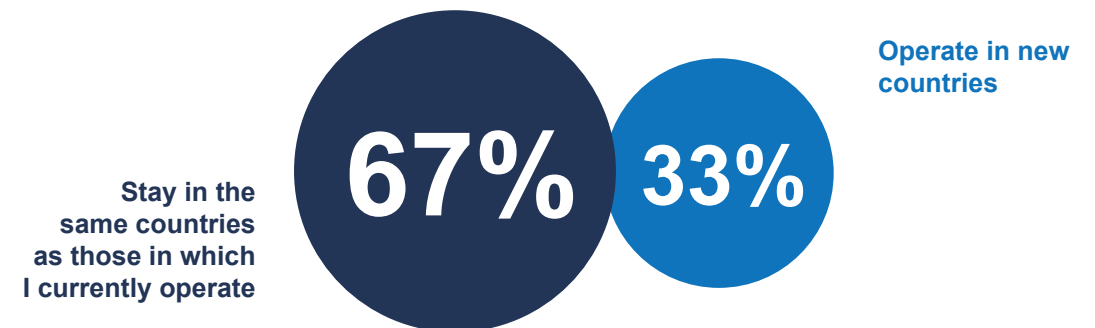
## Financial expectations of Colombian exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

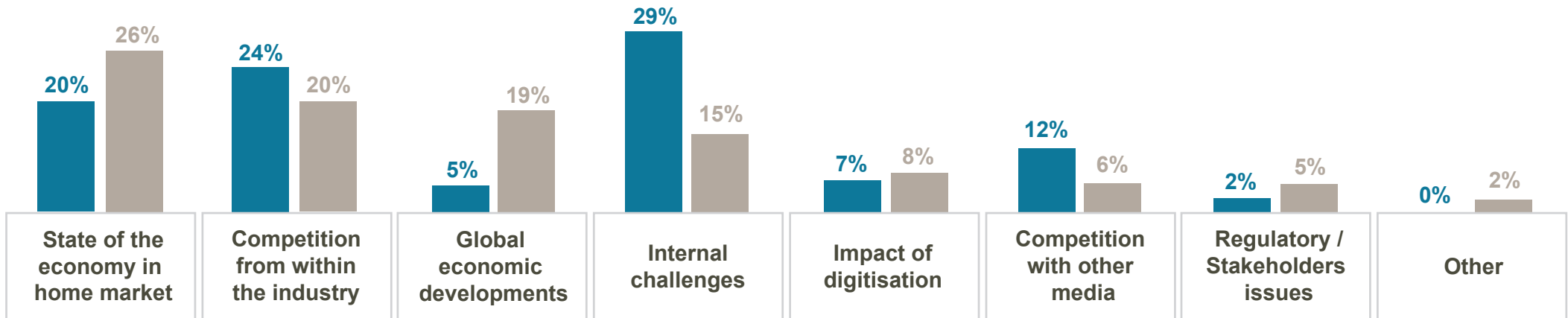


# Detailed results for Columbia



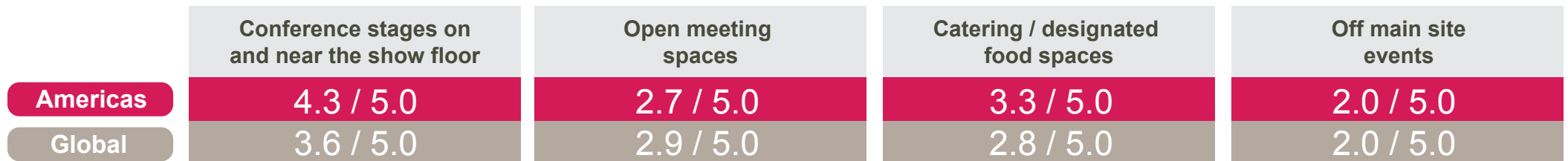
## Most important business issues in the exhibition industry in Columbia and globally

Columbia Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

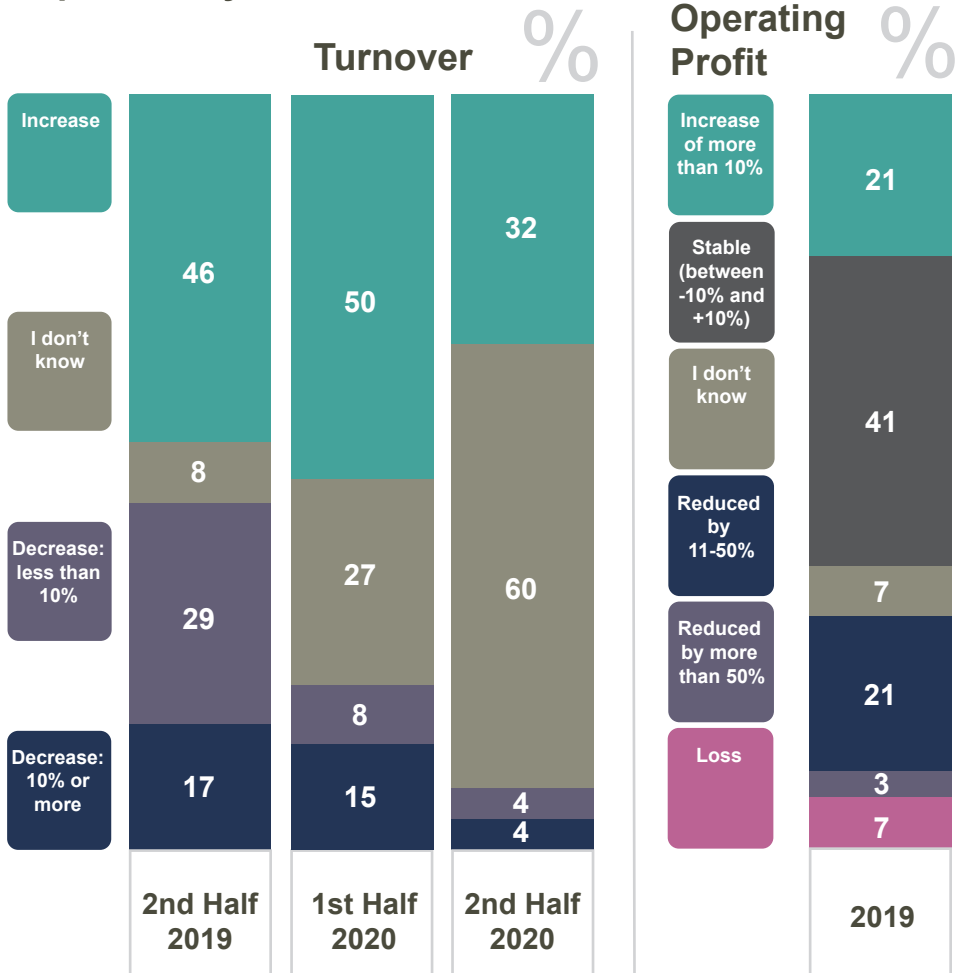


What share of your total space available is used for the respective purposes during your exhibitions?

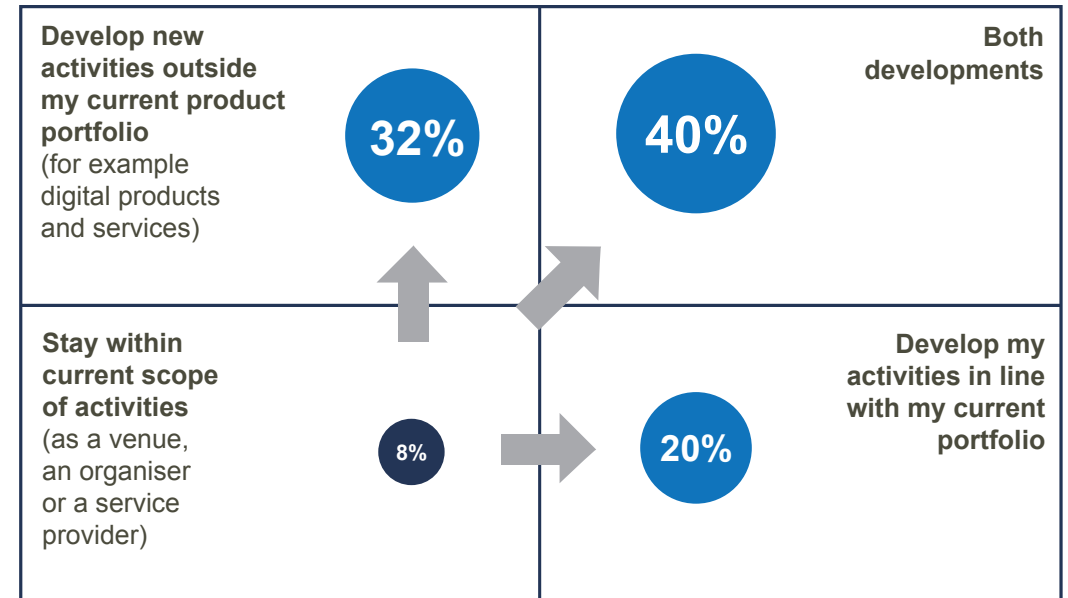


# Detailed results for other countries in Central and South America

## Financial expectations of Other Countries in Central and South America exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



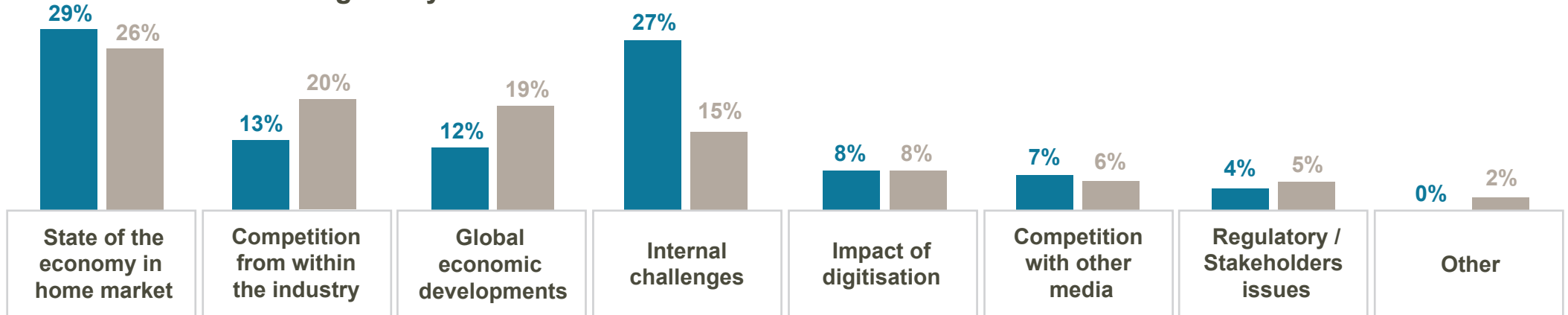
## Current strategic priorities related to geographic exposure



# Detailed results for other countries in Central and South America

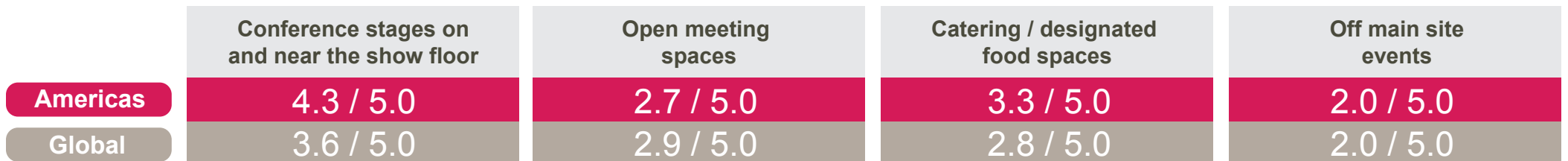
## Most important business issues in the exhibition industry in Other Countries in Central and South America and globally

Others in CSA Global

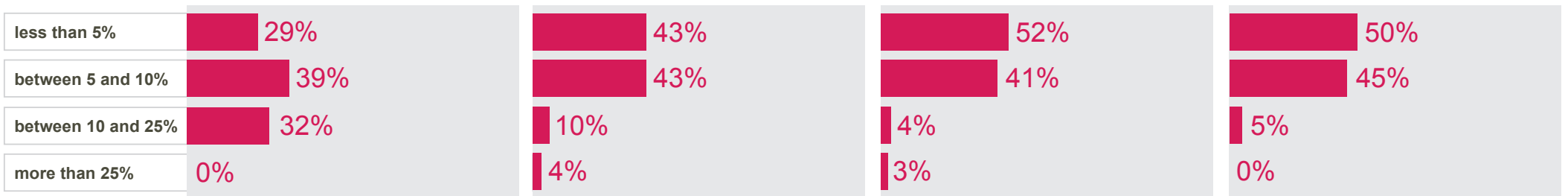


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



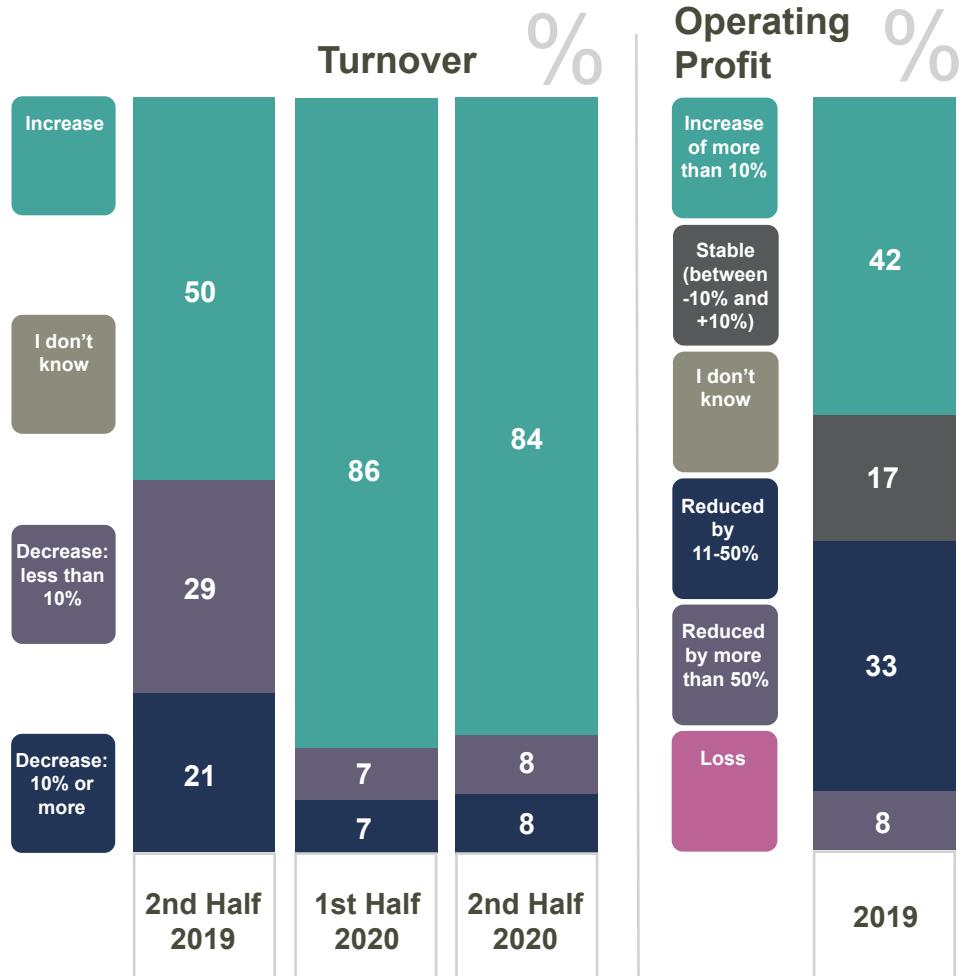
What share of your total space available is used for the respective purposes during your exhibitions?



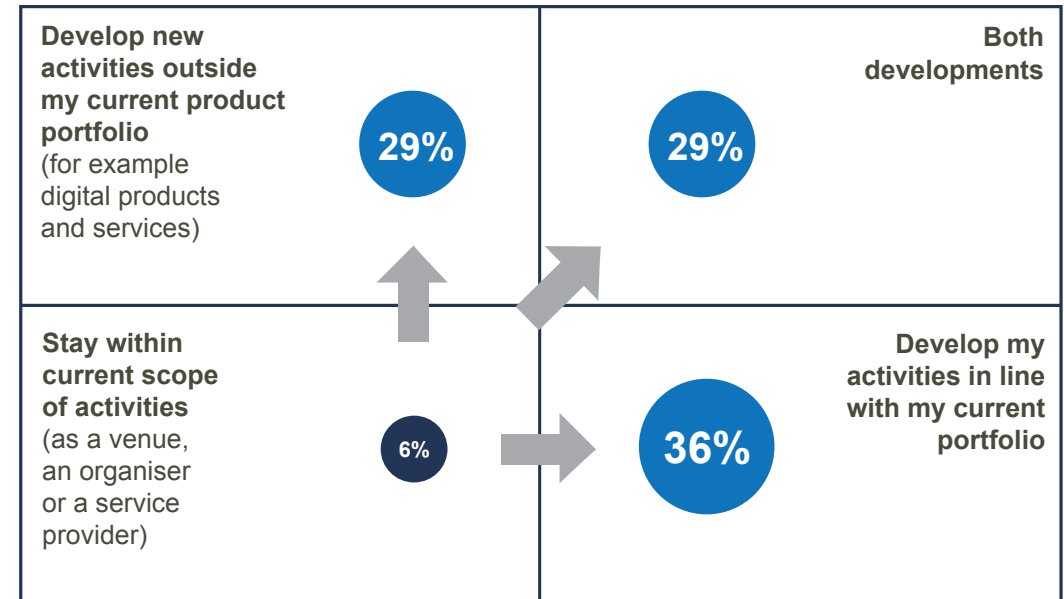
# Detailed results for Germany



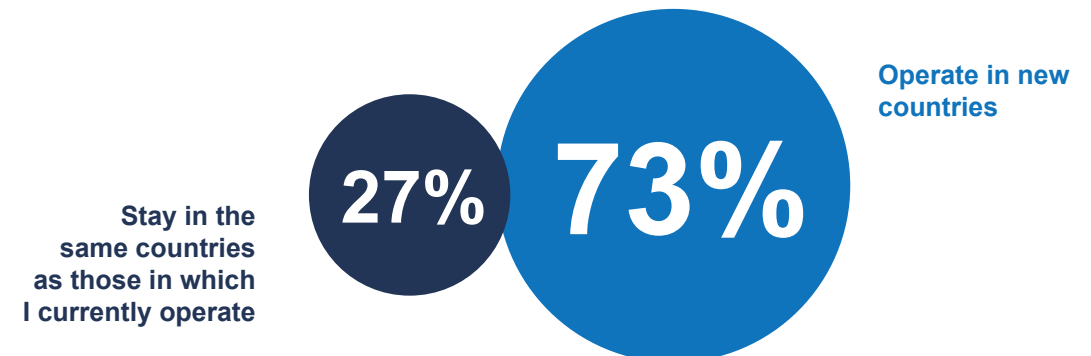
## Financial expectations of German exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure



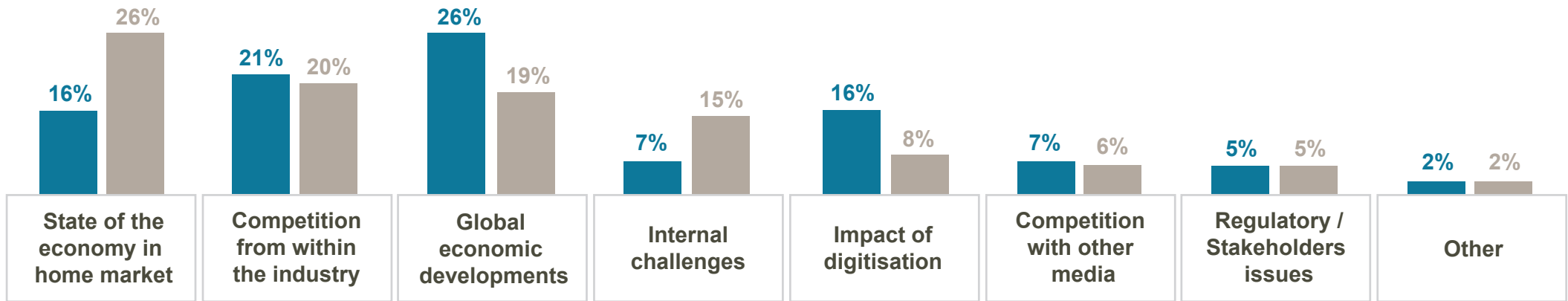
# Detailed results for Germany



## Most important business issues in the exhibition industry in Germany and globally

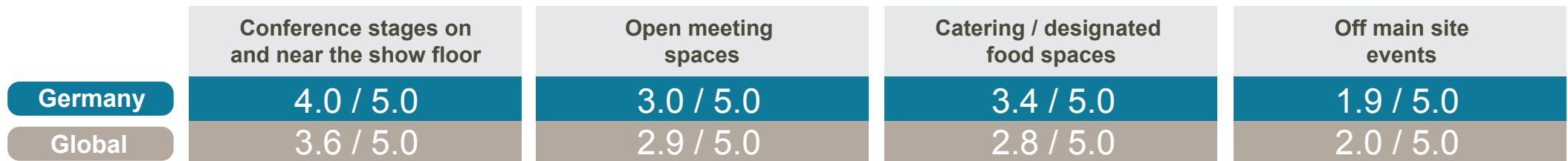
Germany

Global

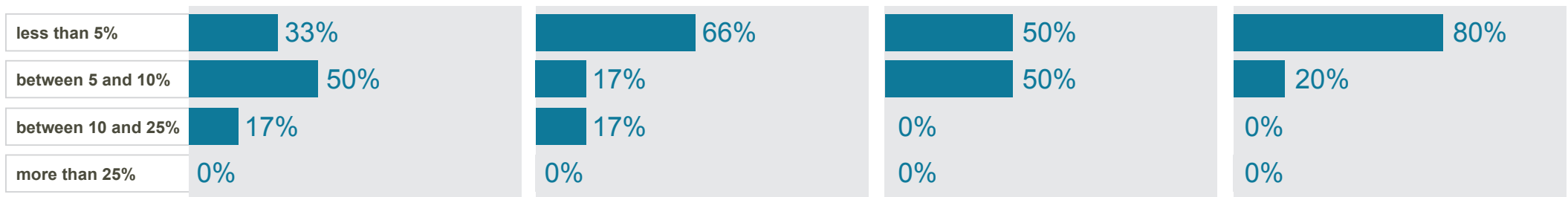


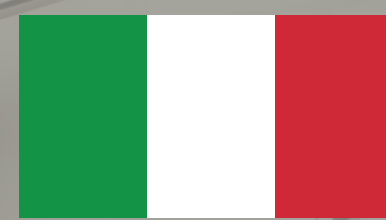
## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

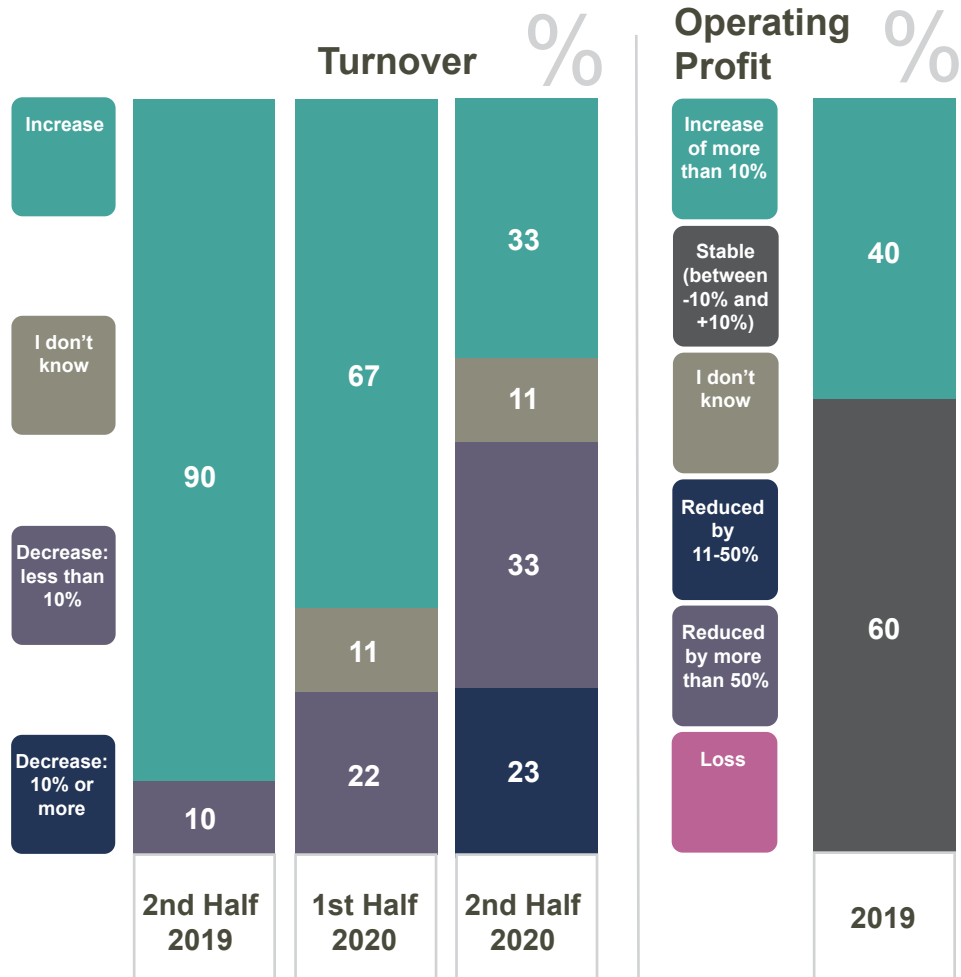


What share of your total space available is used for the respective purposes during your exhibitions?

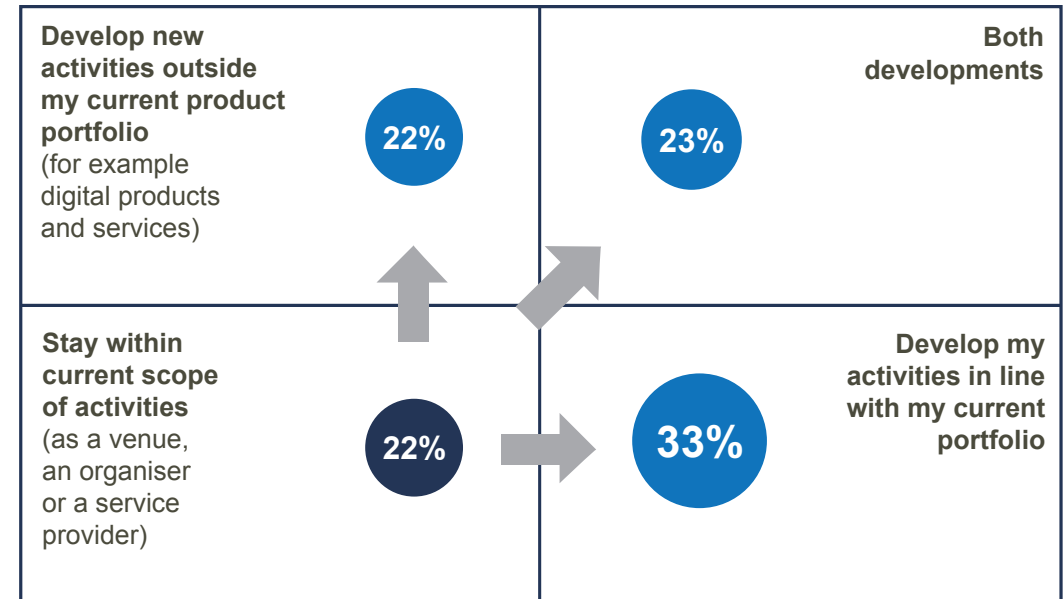




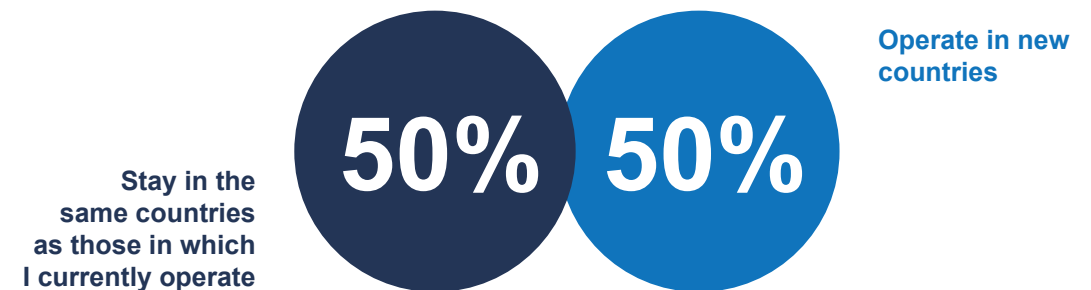
## Financial expectations of Italian exhibition companies compared to previous years

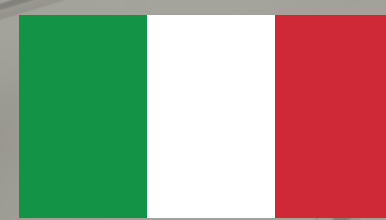


## Current strategic priorities related to the range of activities



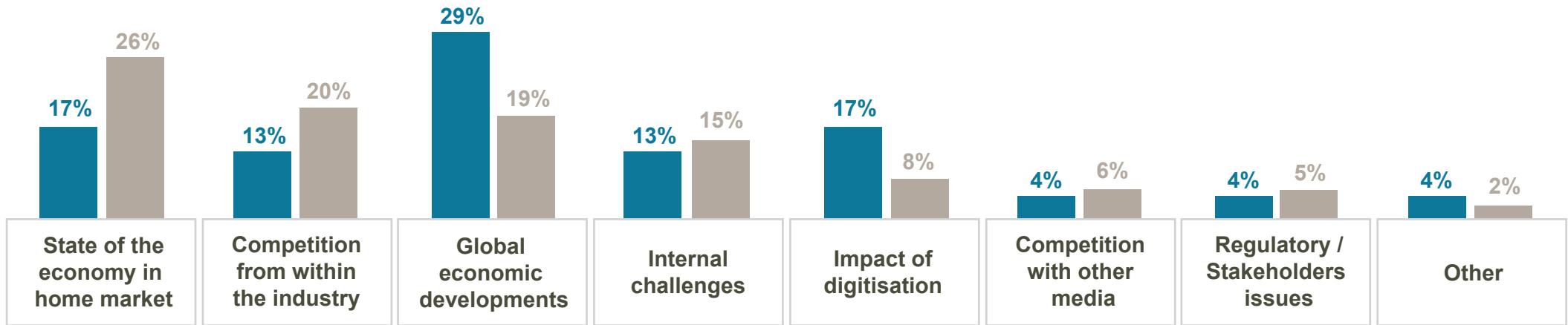
## Current strategic priorities related to geographic exposure





## Most important business issues in the exhibition industry in Italy and globally

Italy Global

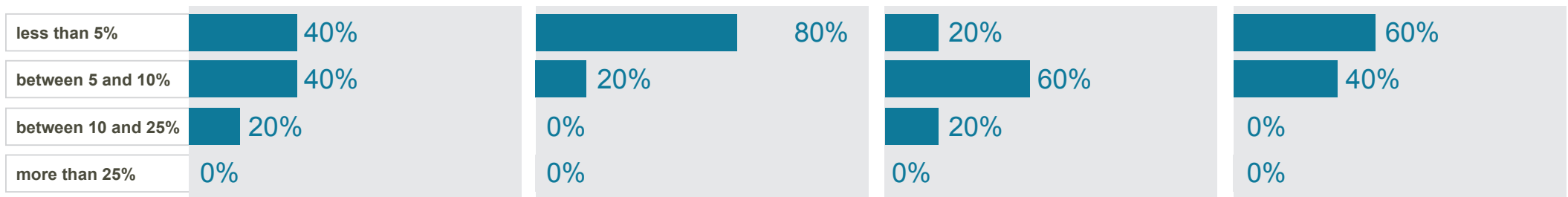


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

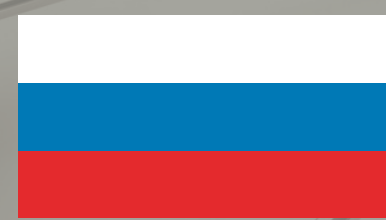
	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Italy	3.0 / 5.0	2.3 / 5.0	3.5 / 5.0	1.8 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?



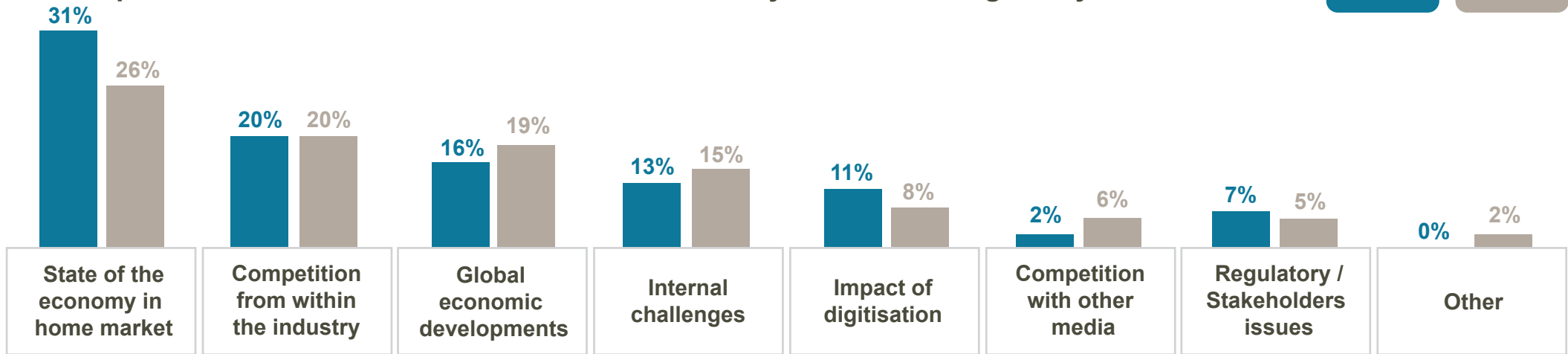






## Most important business issues in the exhibition industry in Russia and globally

Russia Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

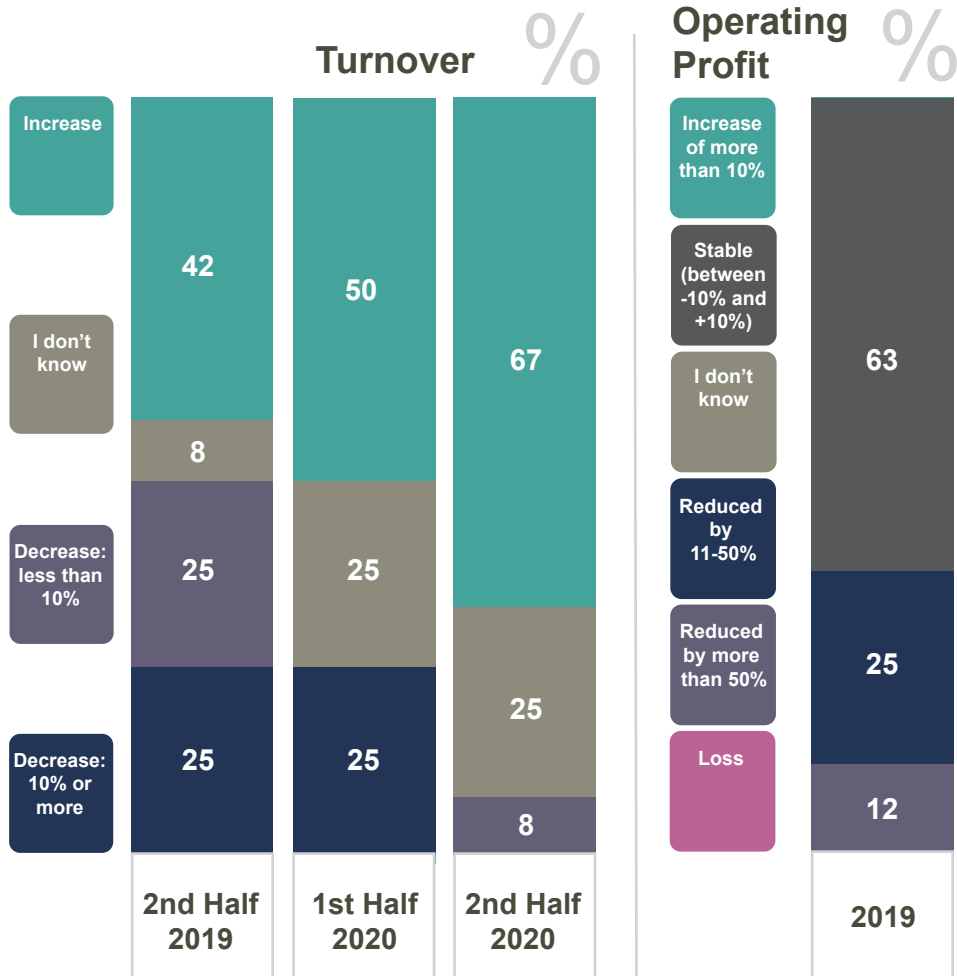
	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Russia	3.7 / 5.0	3.0 / 5.0	3.4 / 5.0	1.9 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?

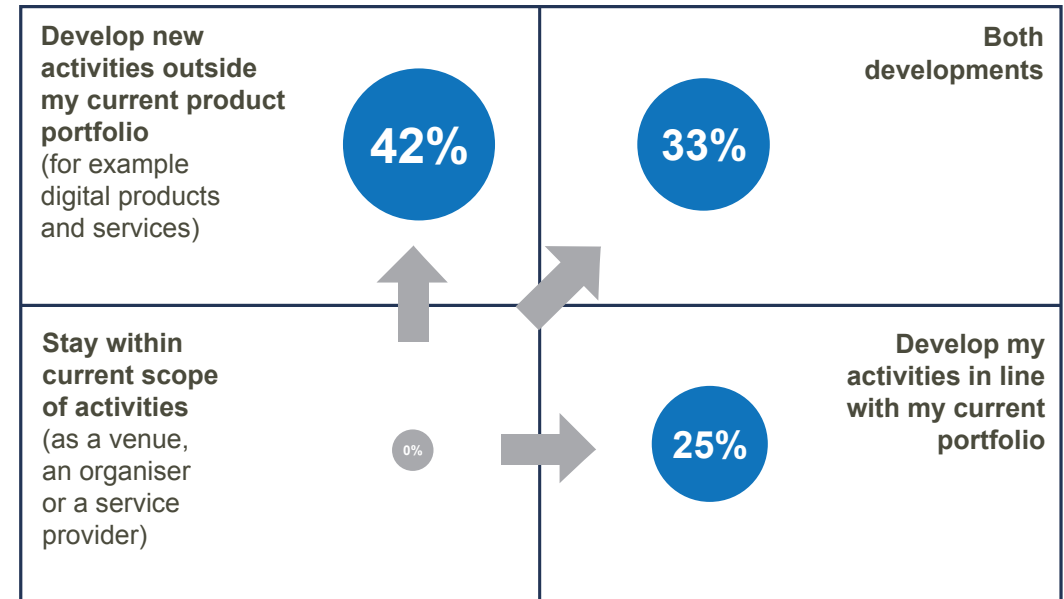




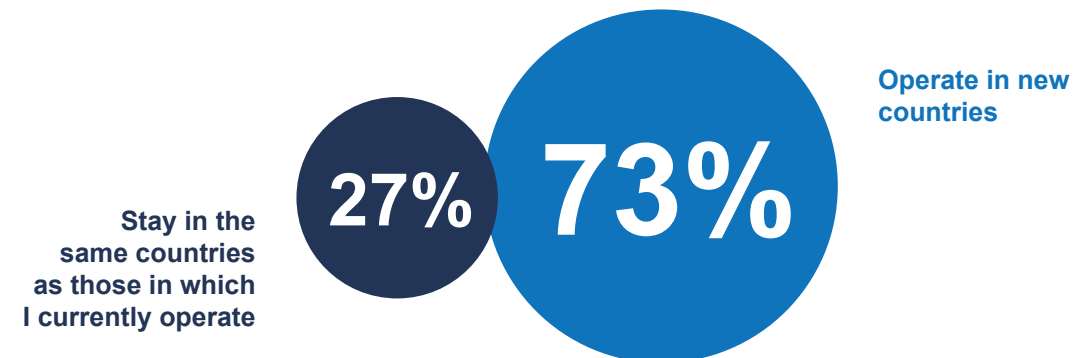
## Financial expectations of UK exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



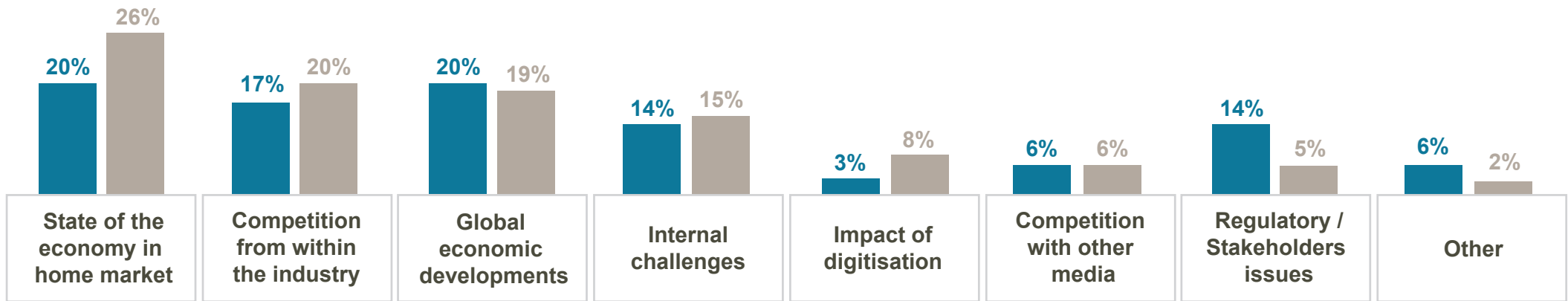
## Current strategic priorities related to geographic exposure





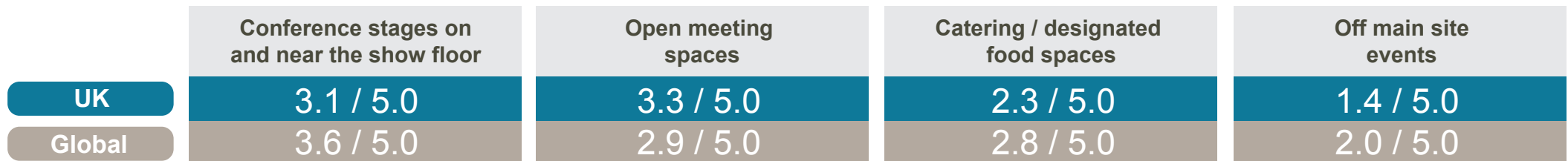
## Most important business issues in the exhibition industry in the UK and globally

**UK** Global

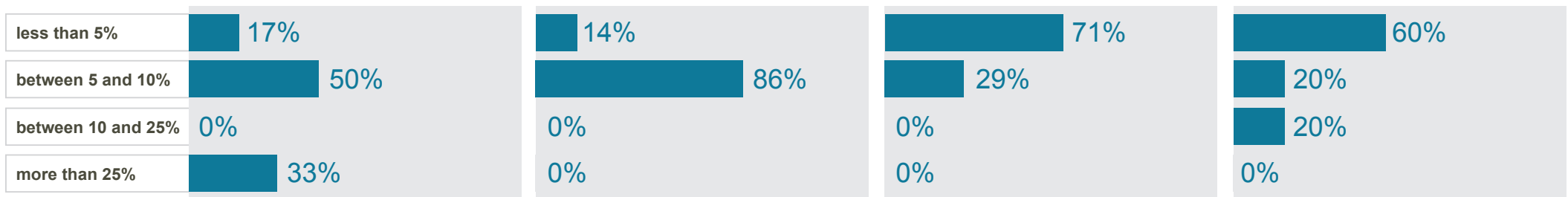


## Evolution of the business model for exhibitions

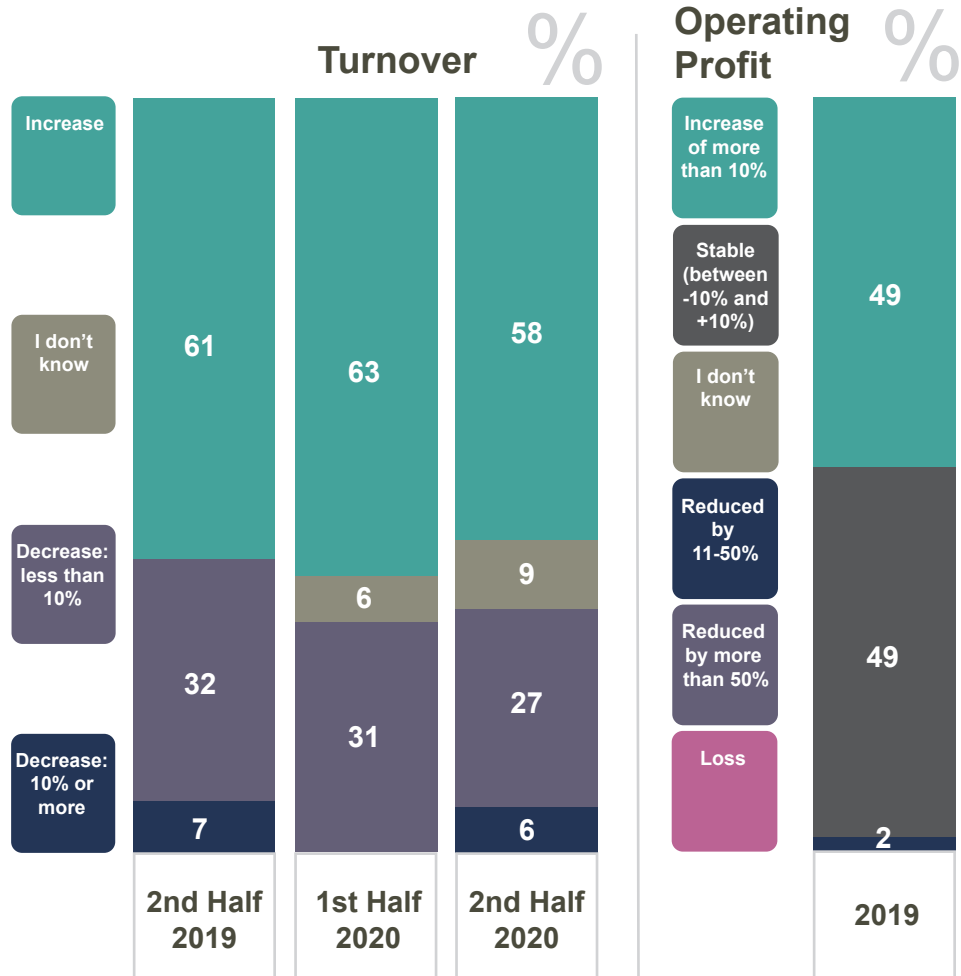
To what degree have you added the following elements to your shows?



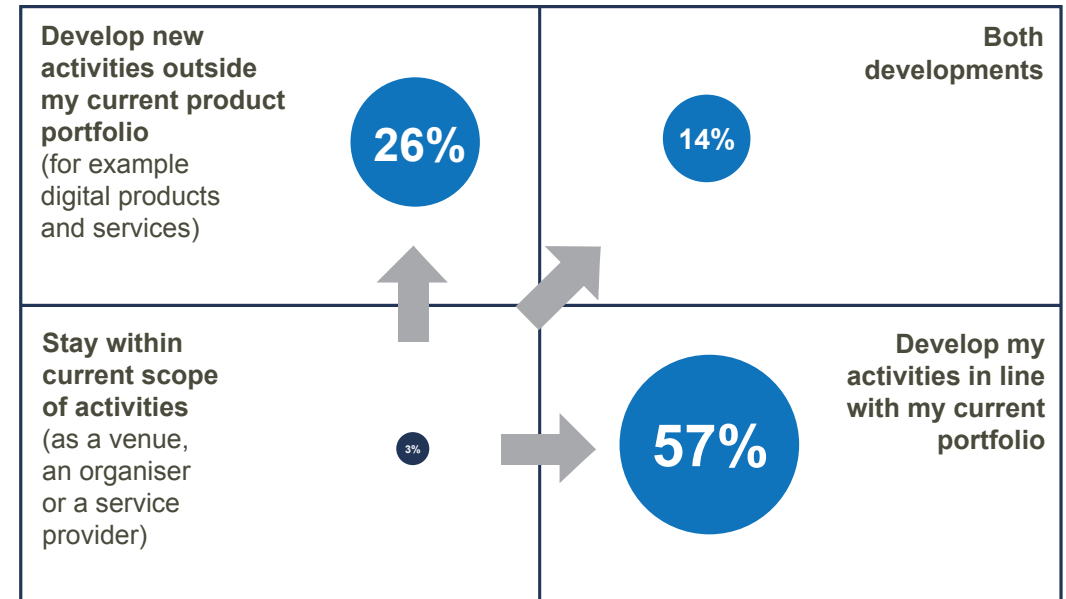
What share of your total space available is used for the respective purposes during your exhibitions?



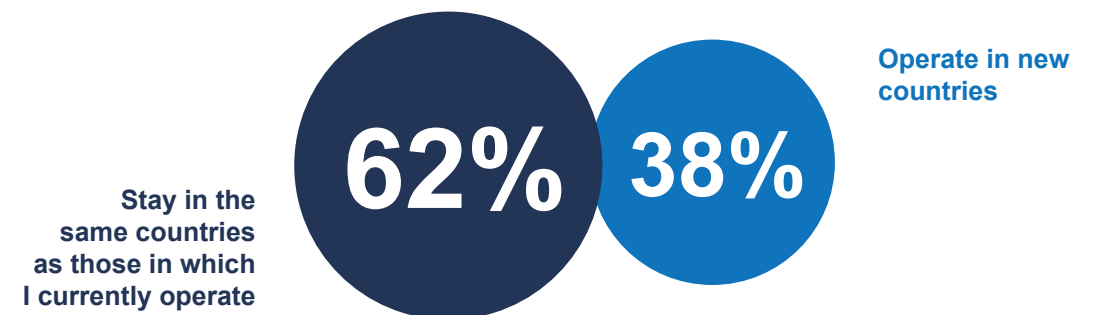
## Financial expectations of Other Countries in Europe exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

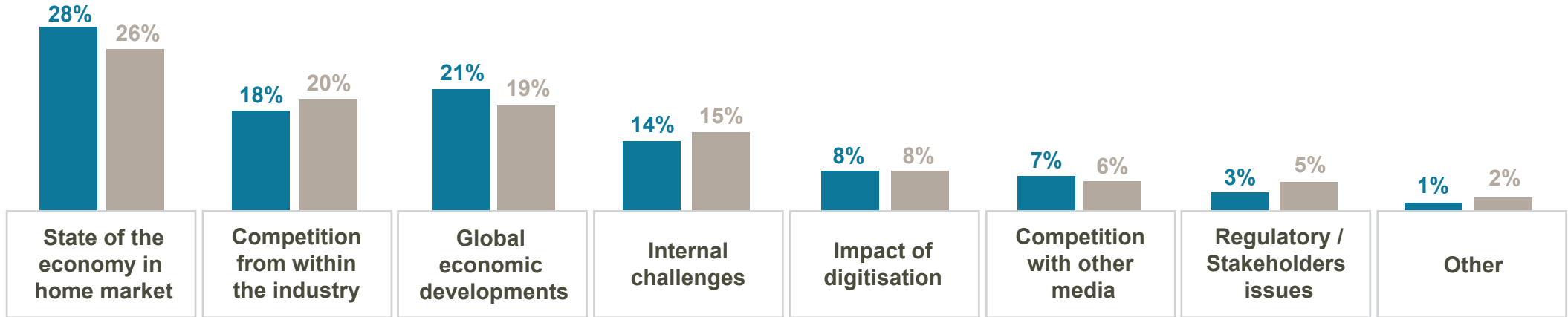


# Detailed results for other countries in Europe

## Most important business issues in the exhibition industry in Other Countries in Europe and globally

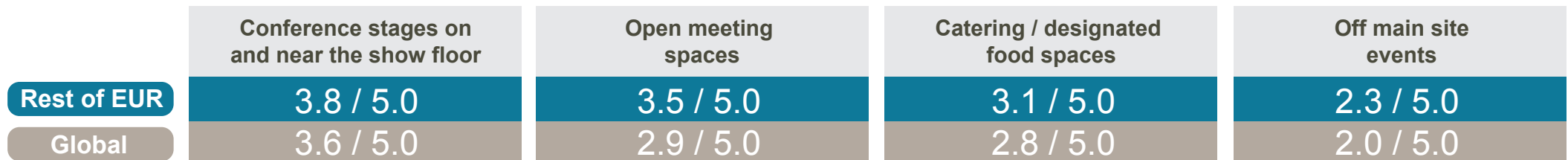
Rest of EUR

Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



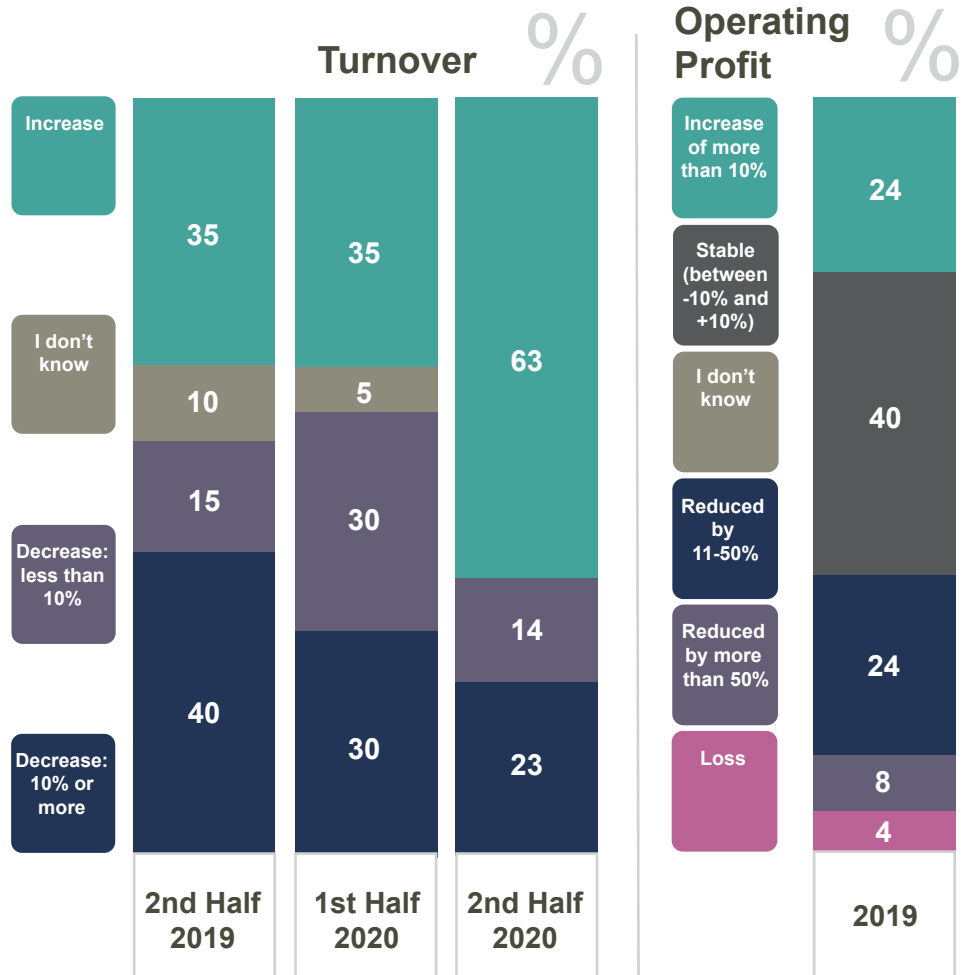
What share of your total space available is used for the respective purposes during your exhibitions?



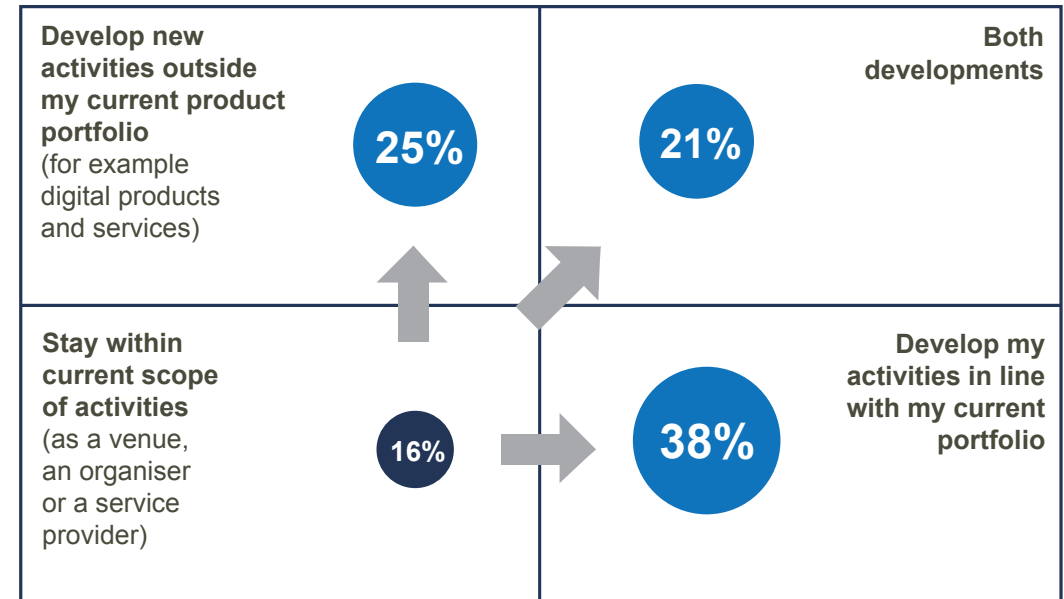
# Detailed results for South Africa



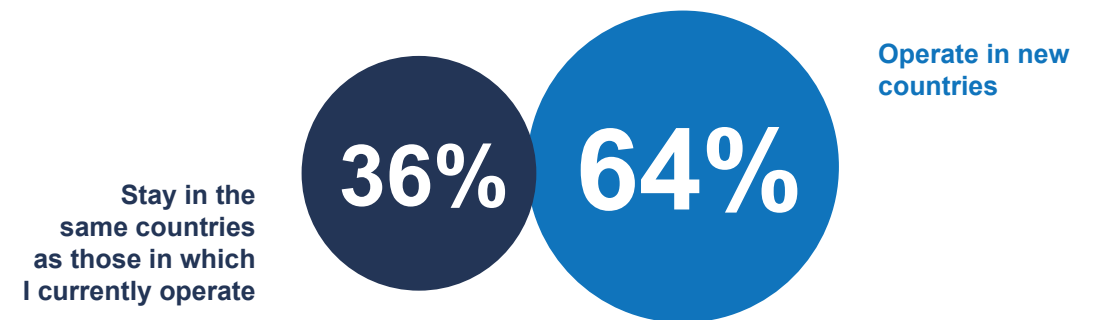
## Financial expectations of South African exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

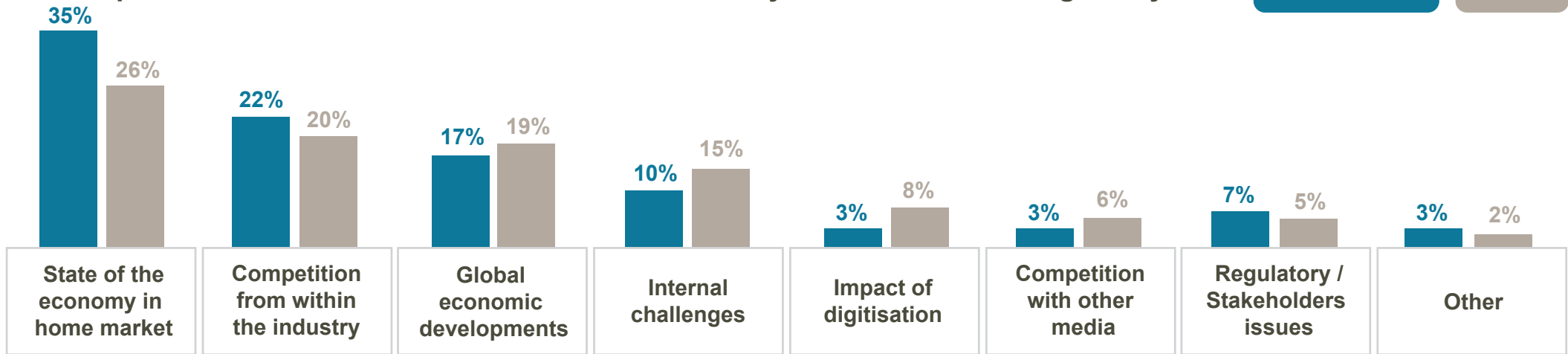


# Detailed results for South Africa



## Most important business issues in the exhibition industry in South Africa and globally

South Africa Global

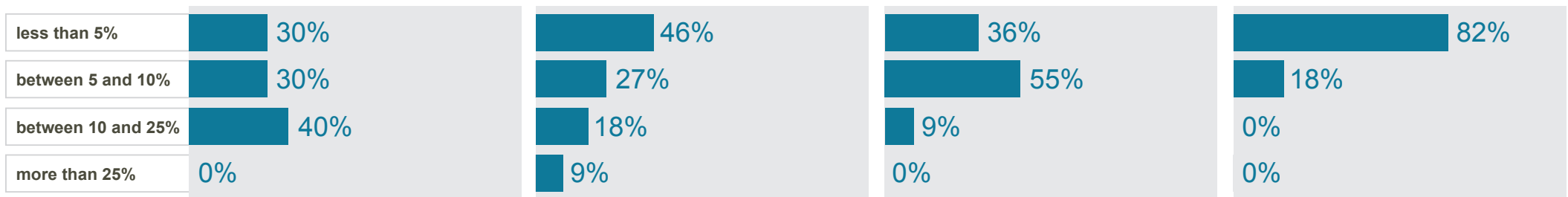


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
S Africa	1.9 / 5.0	1.8 / 5.0	2.1 / 5.0	1.2 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?

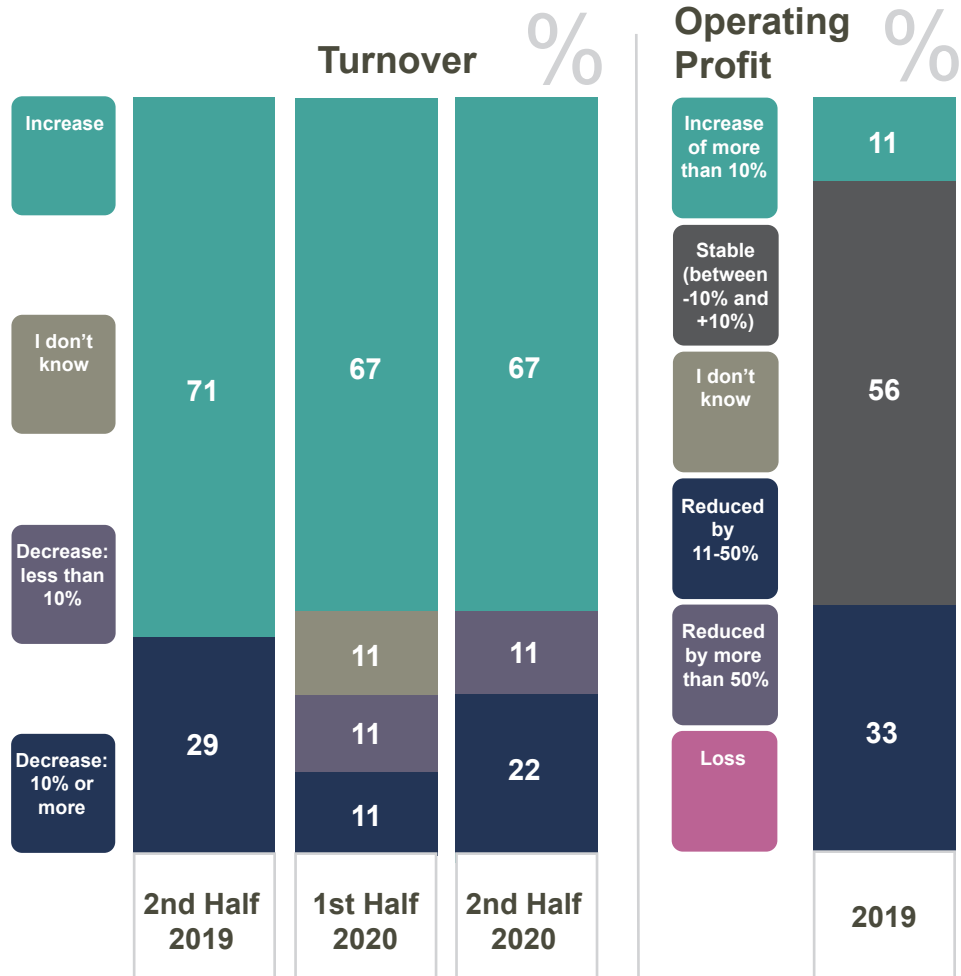




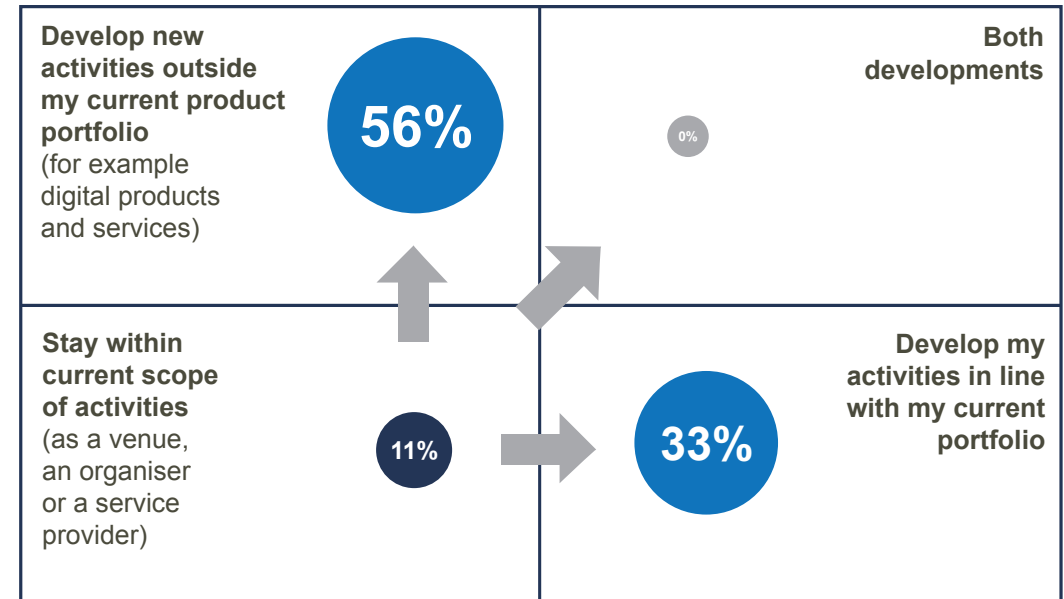
# Detailed results for United Arab Emirates



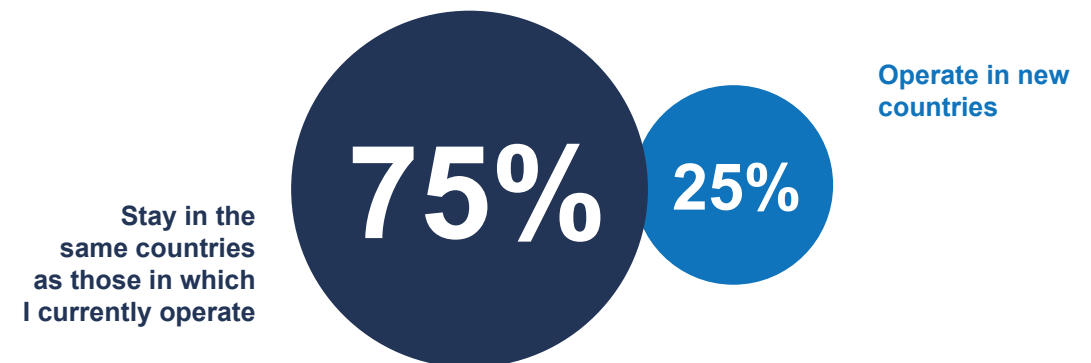
## Financial expectations of United Arab Emirates exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

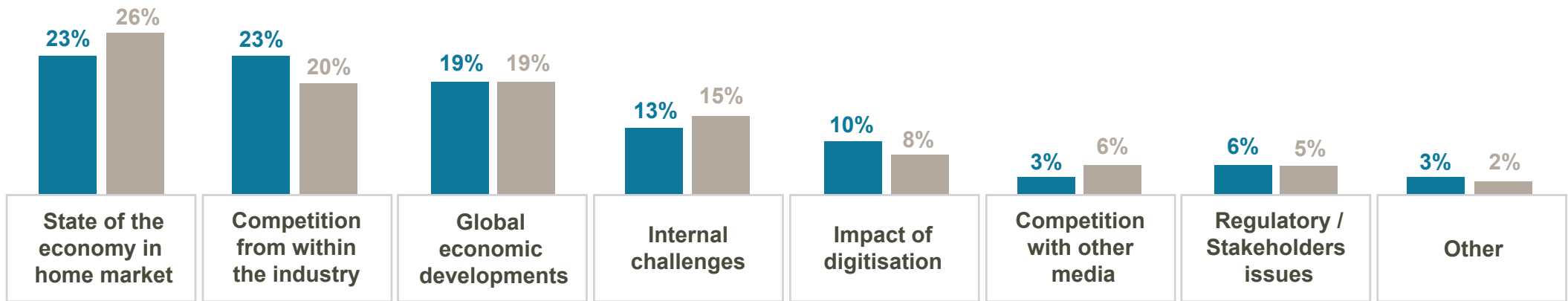


# Detailed results for United Arab Emirates



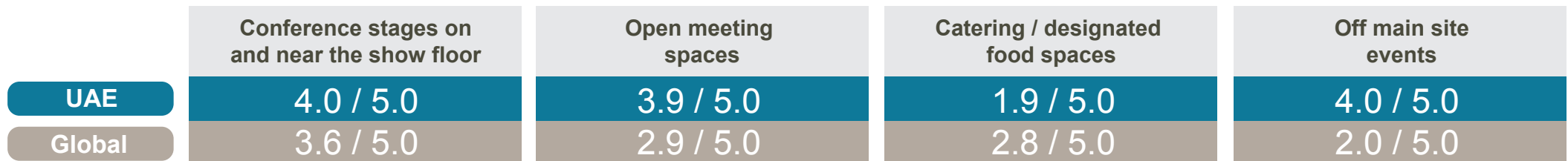
## Most important business issues in the exhibition industry in United Arab Emirates and globally

UAE
Global

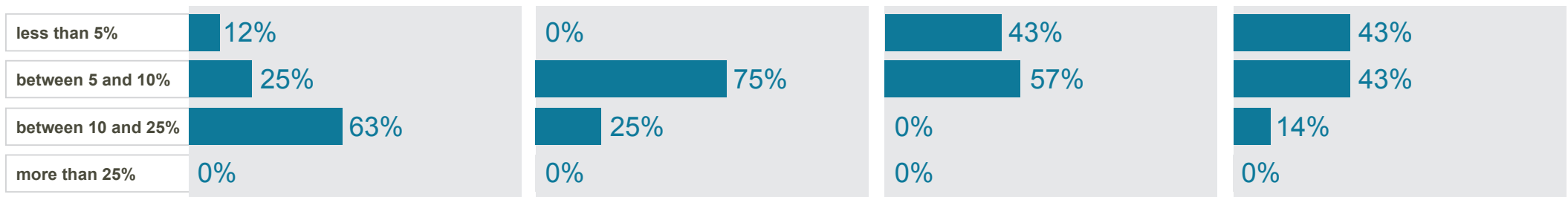


## Evolution of the business model for exhibitions

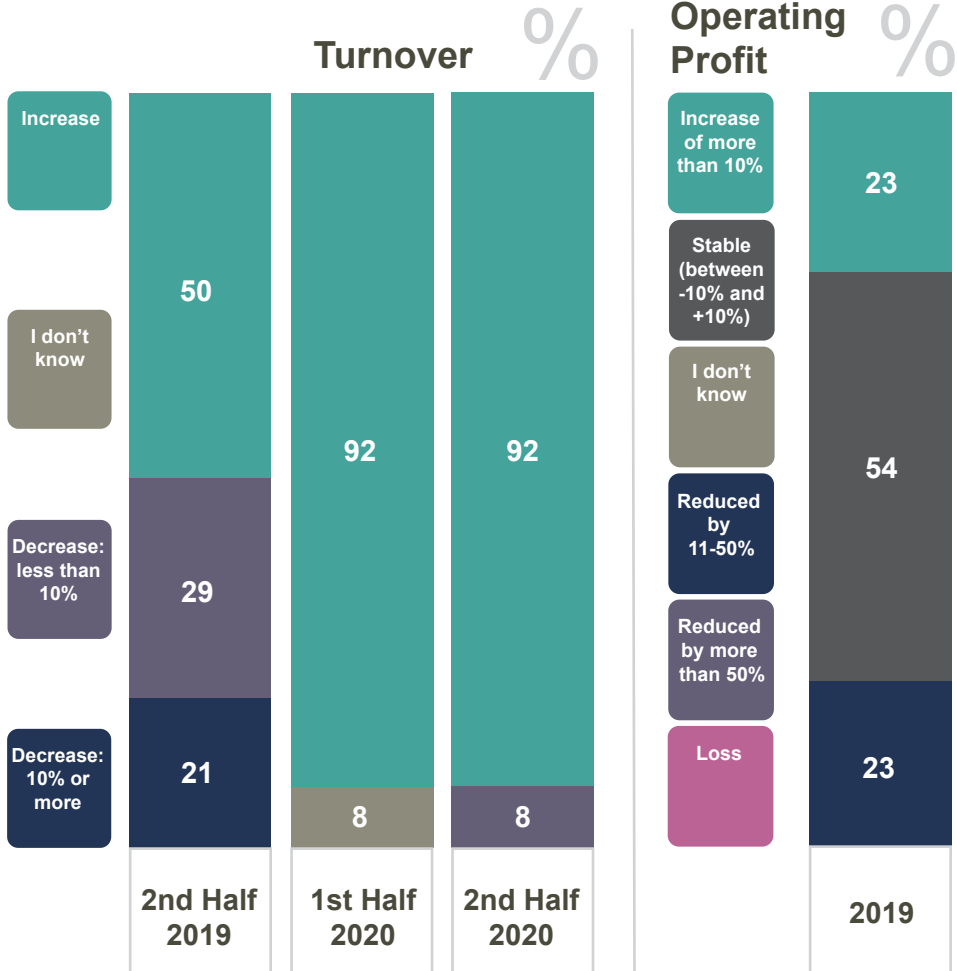
To what degree have you added the following elements to your shows?



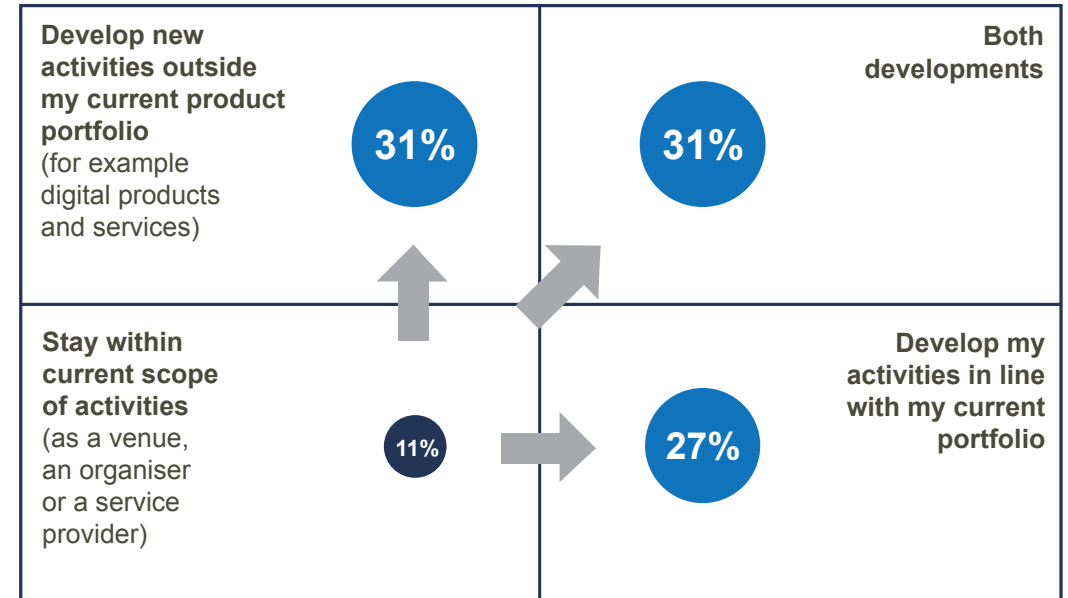
What share of your total space available is used for the respective purposes during your exhibitions?



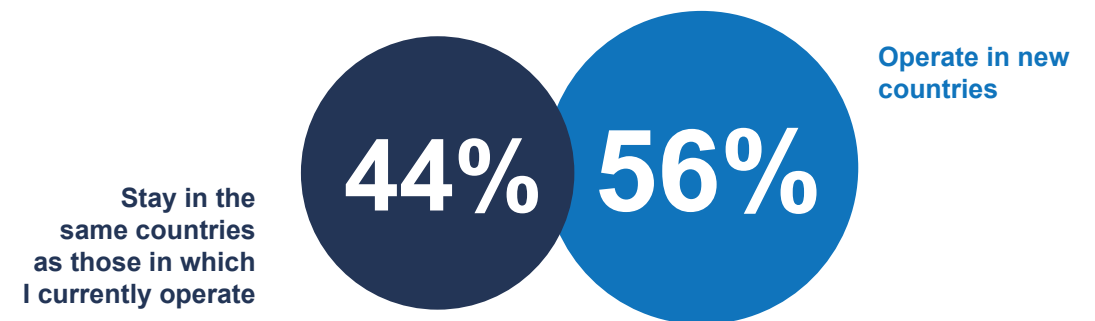
## Financial expectations of Other Countries in the Middle East exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

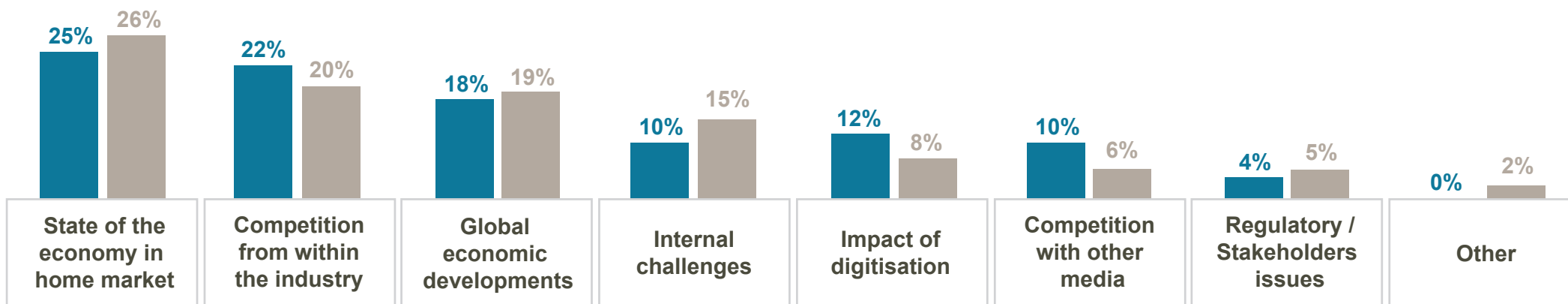


# Detailed results for other countries in the Middle East

## Most important business issues in the exhibition industry Other Countries in the Middle East and globally

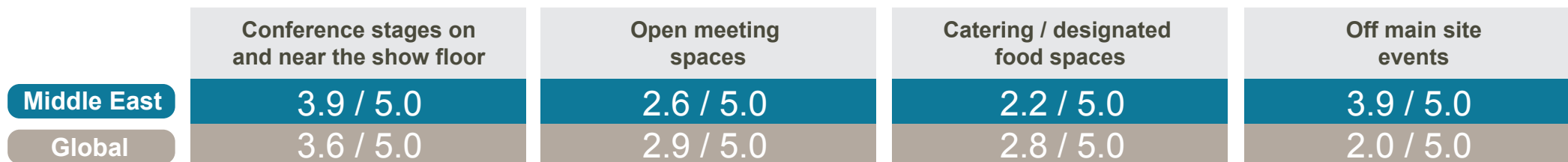
Middle East

Global

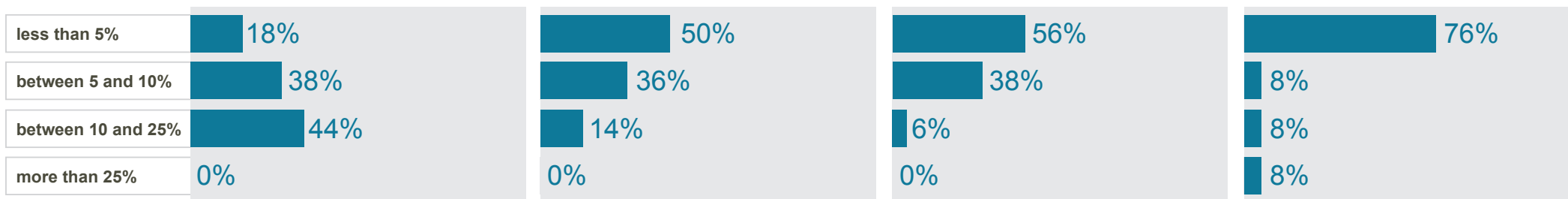


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



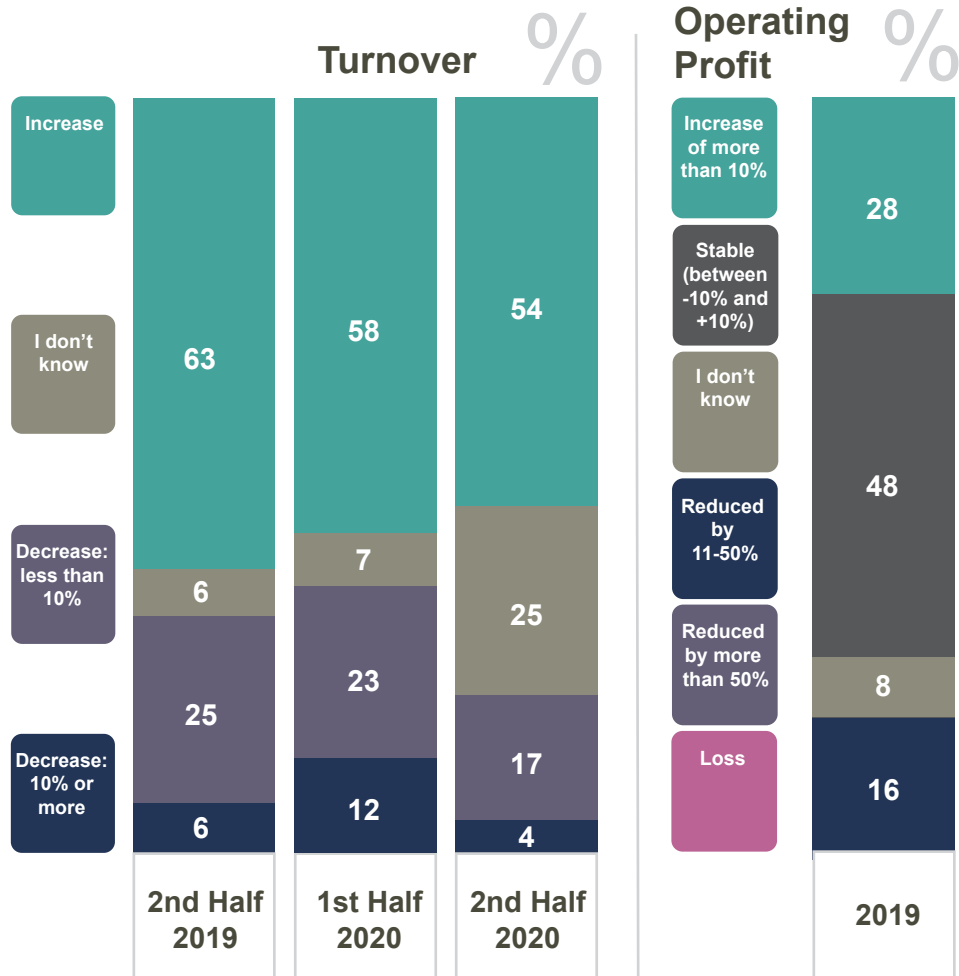
What share of your total space available is used for the respective purposes during your exhibitions?



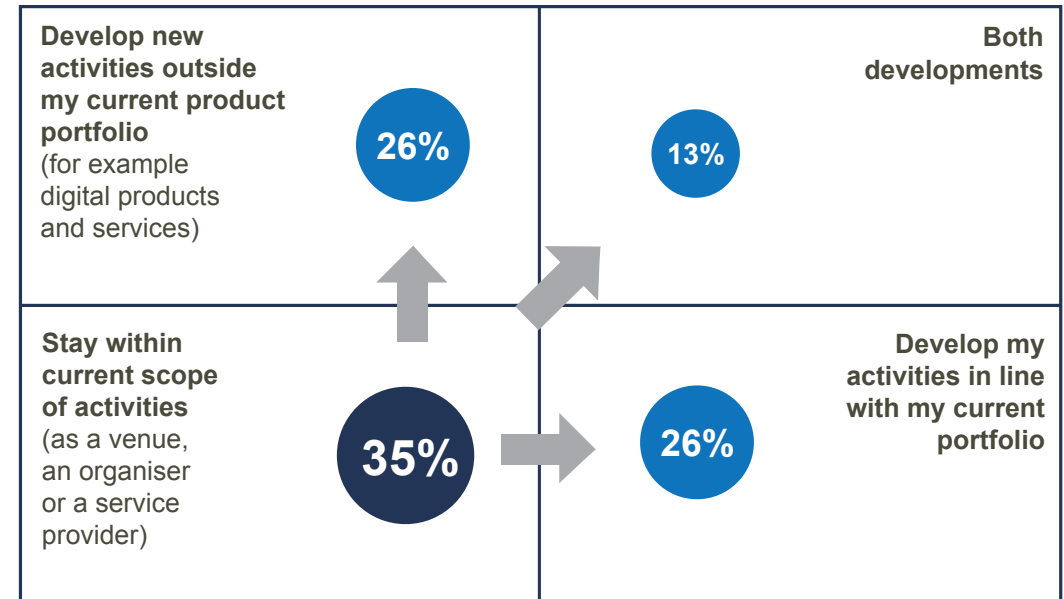
# Detailed results for Australia



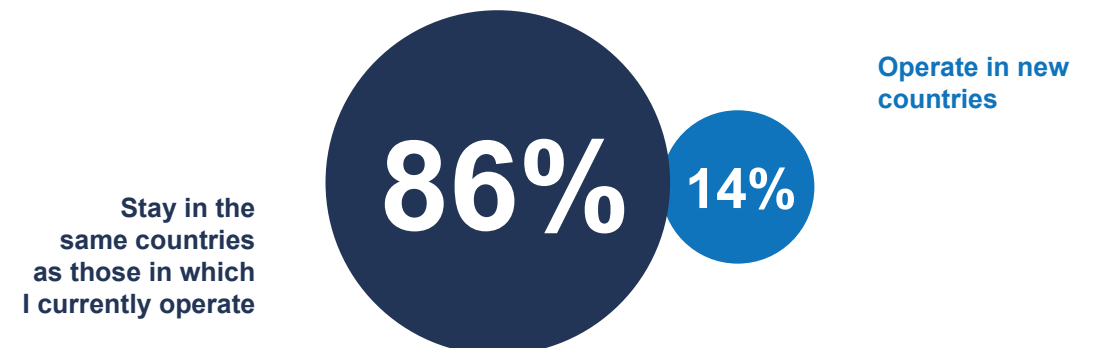
## Financial expectations of Australian exhibition companies compared to previous years



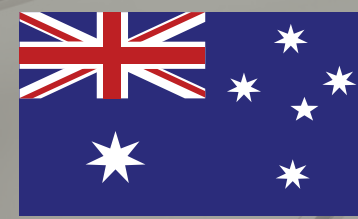
## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

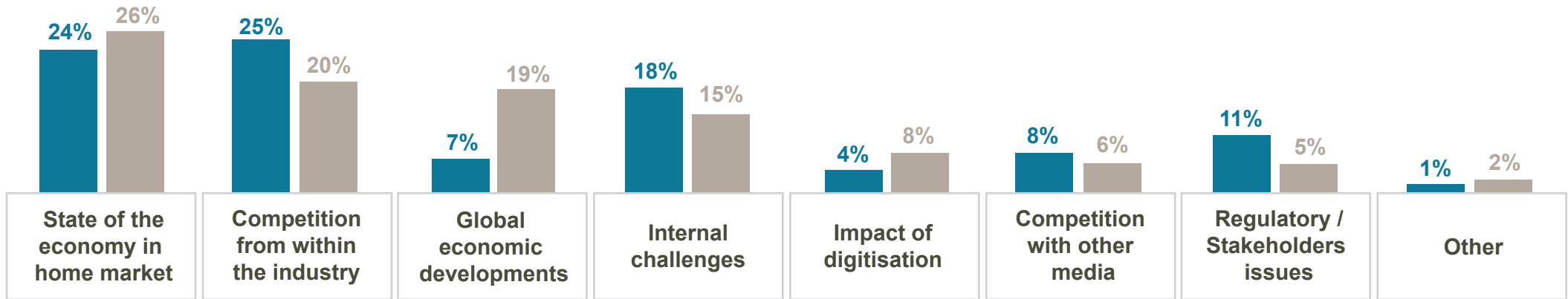


# Detailed results for Australia



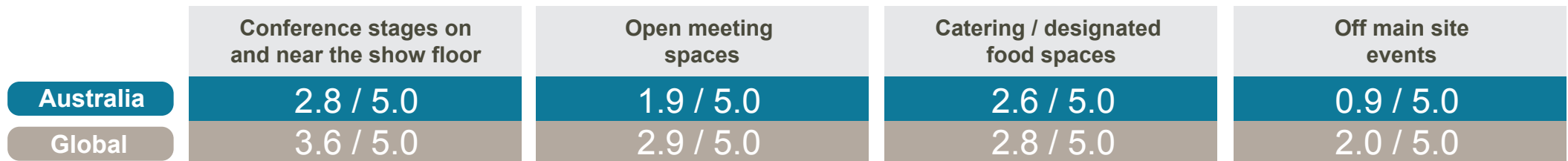
## Most important business issues in the exhibition industry in Australia and globally

Australia Global

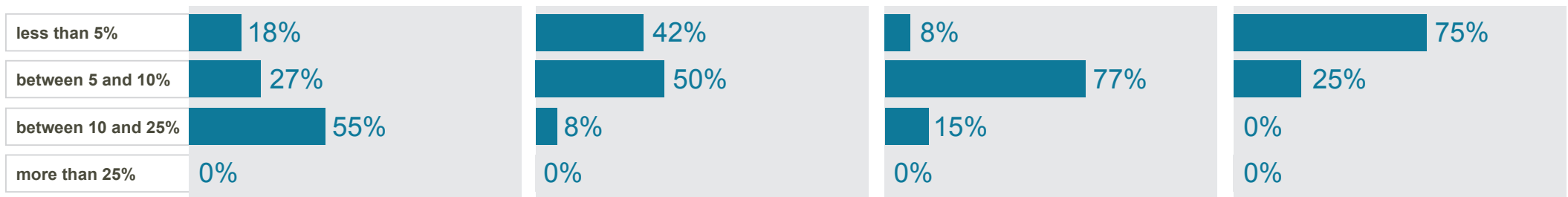


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

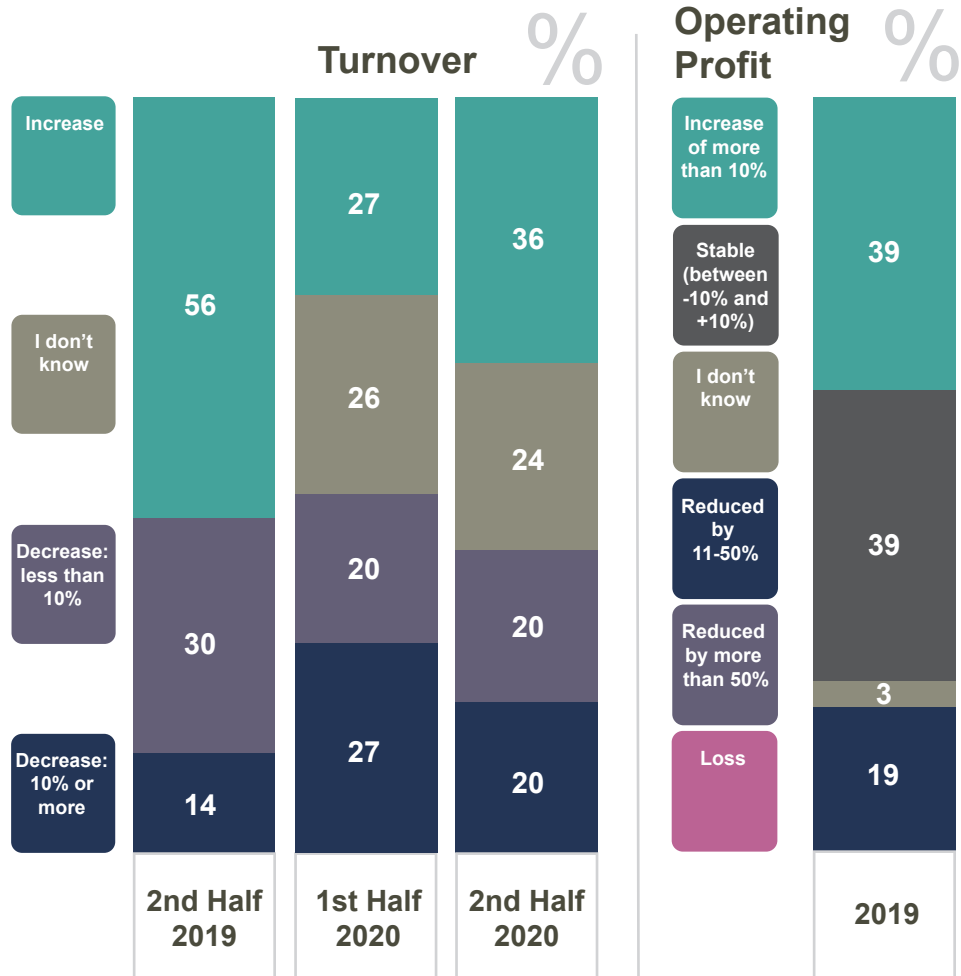


What share of your total space available is used for the respective purposes during your exhibitions?

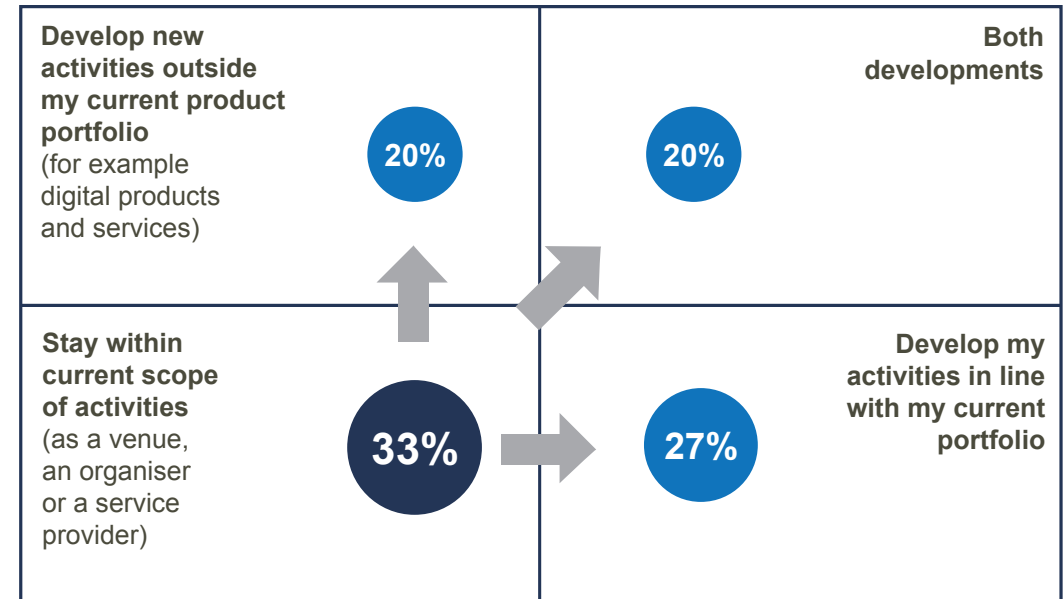




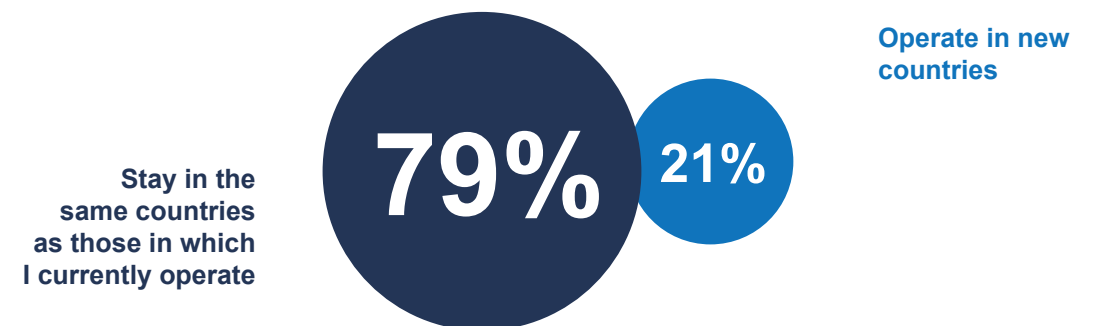
## Financial expectations of Chinese exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



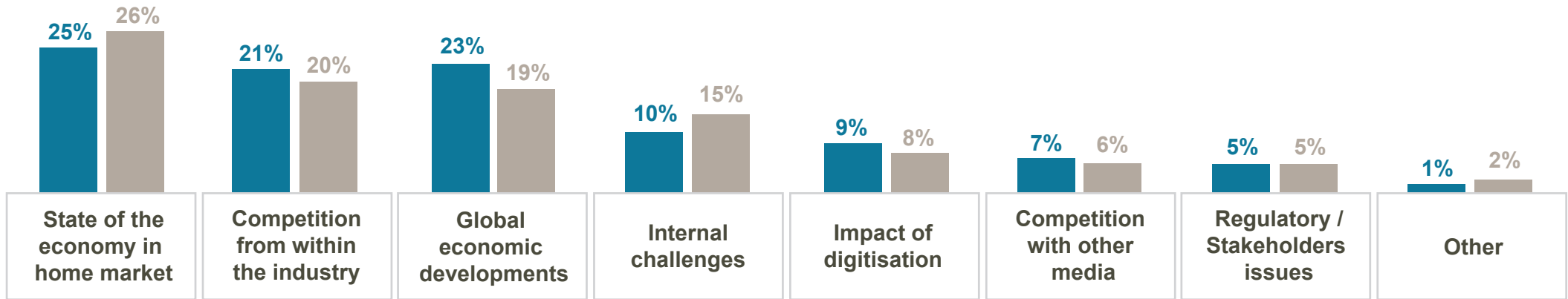
## Current strategic priorities related to geographic exposure





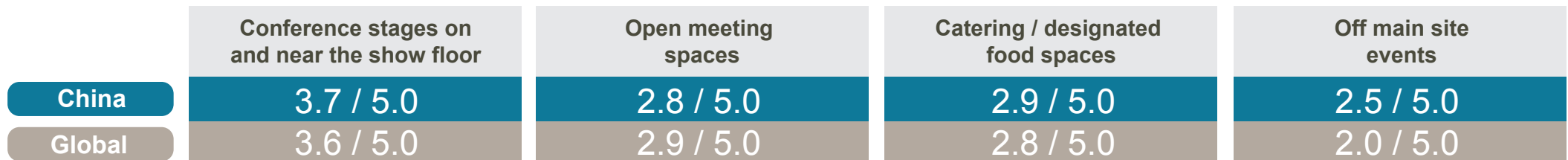
## Most important business issues in the exhibition industry in China and globally

China Global

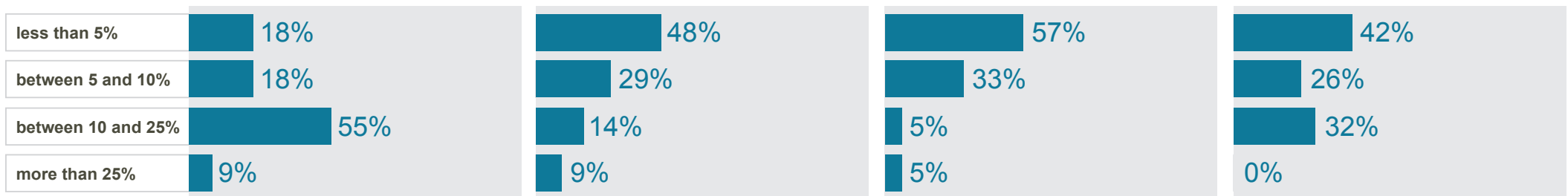


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



What share of your total space available is used for the respective purposes during your exhibitions?

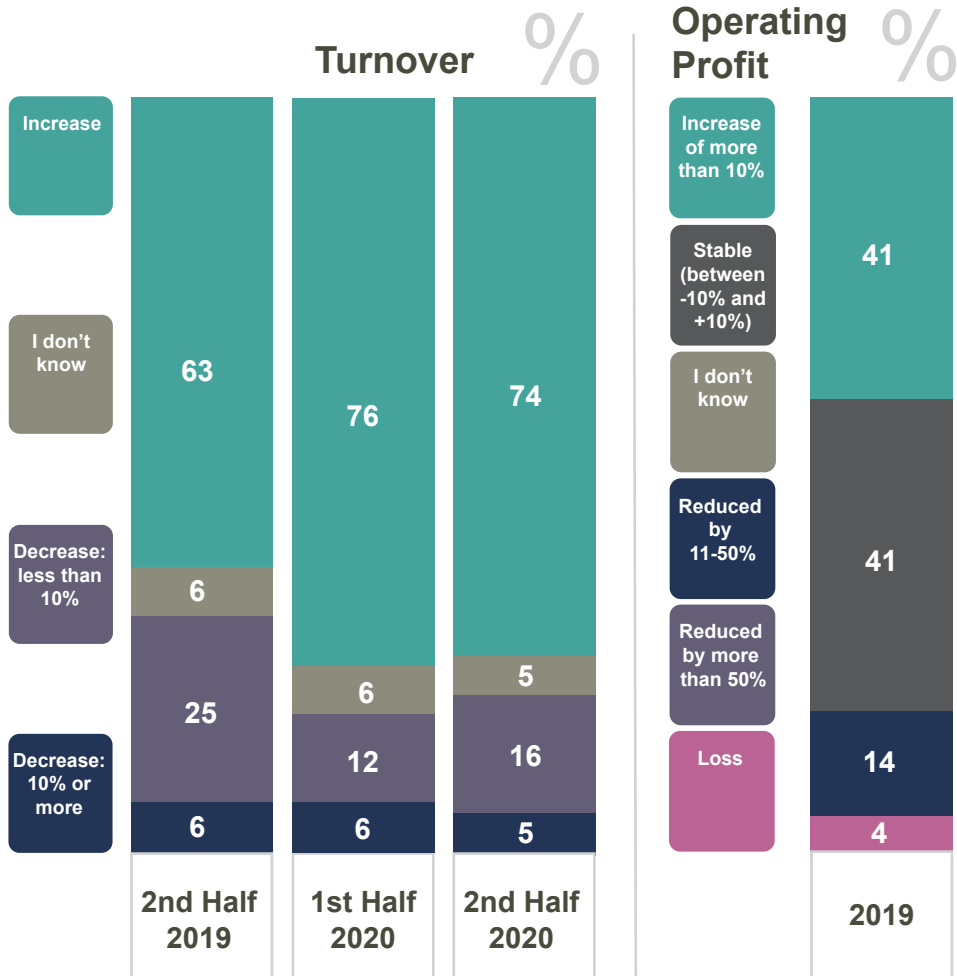




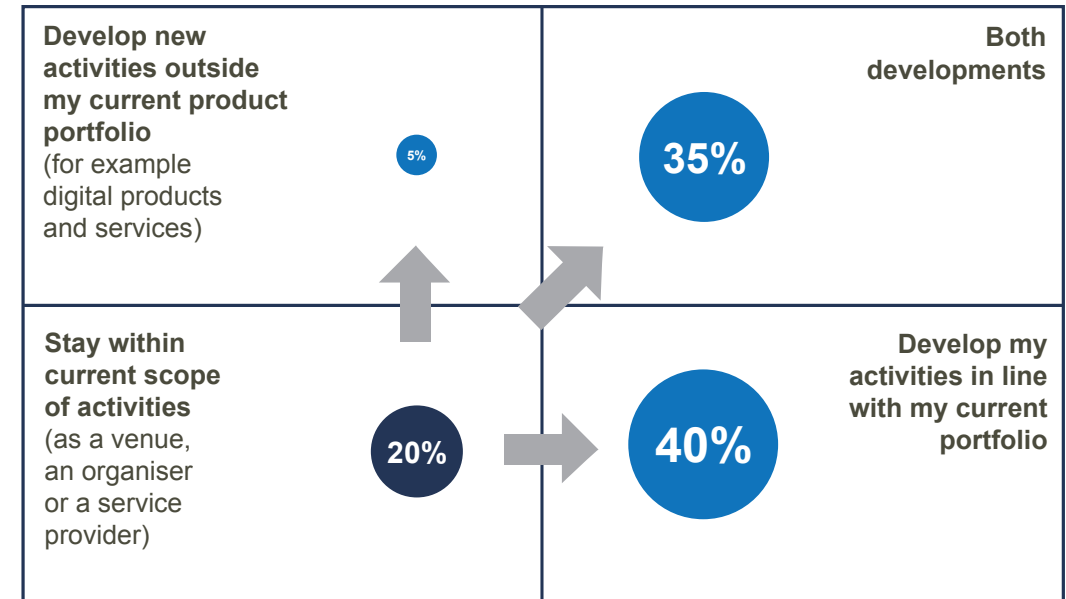
# Detailed results for India



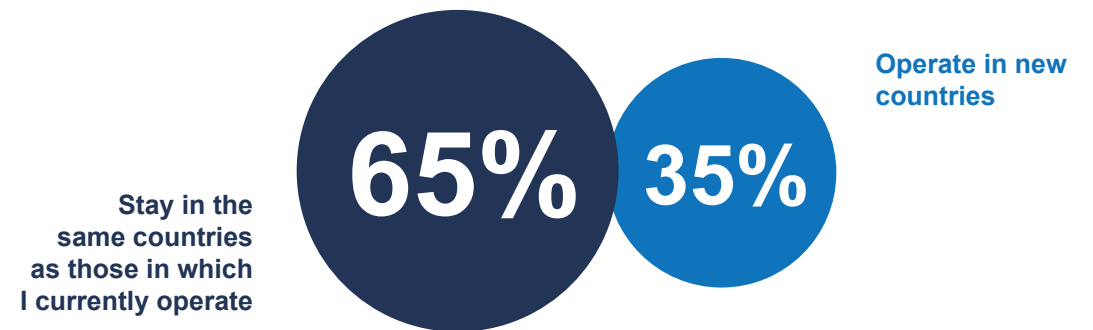
## Financial expectations of Indian exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



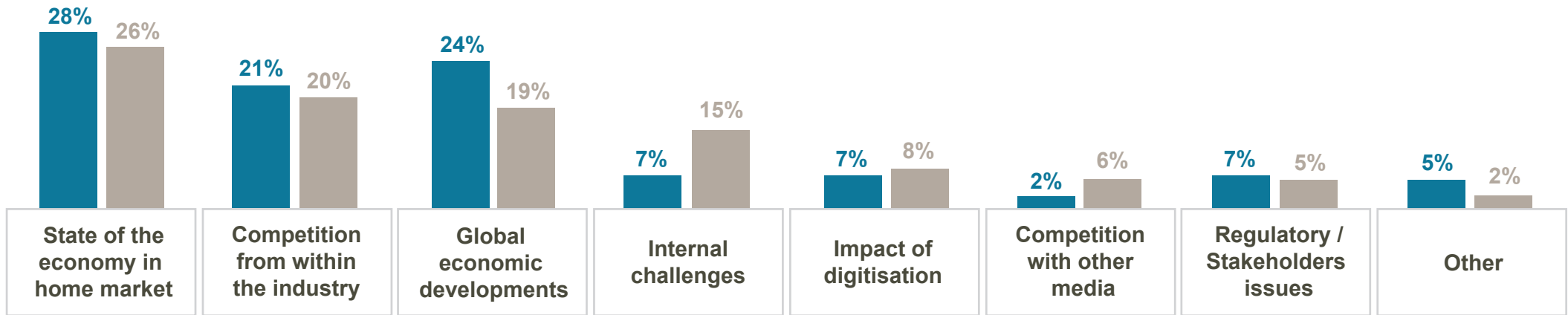
## Current strategic priorities related to geographic exposure





## Most important business issues in the exhibition industry in India and globally

India Global



## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

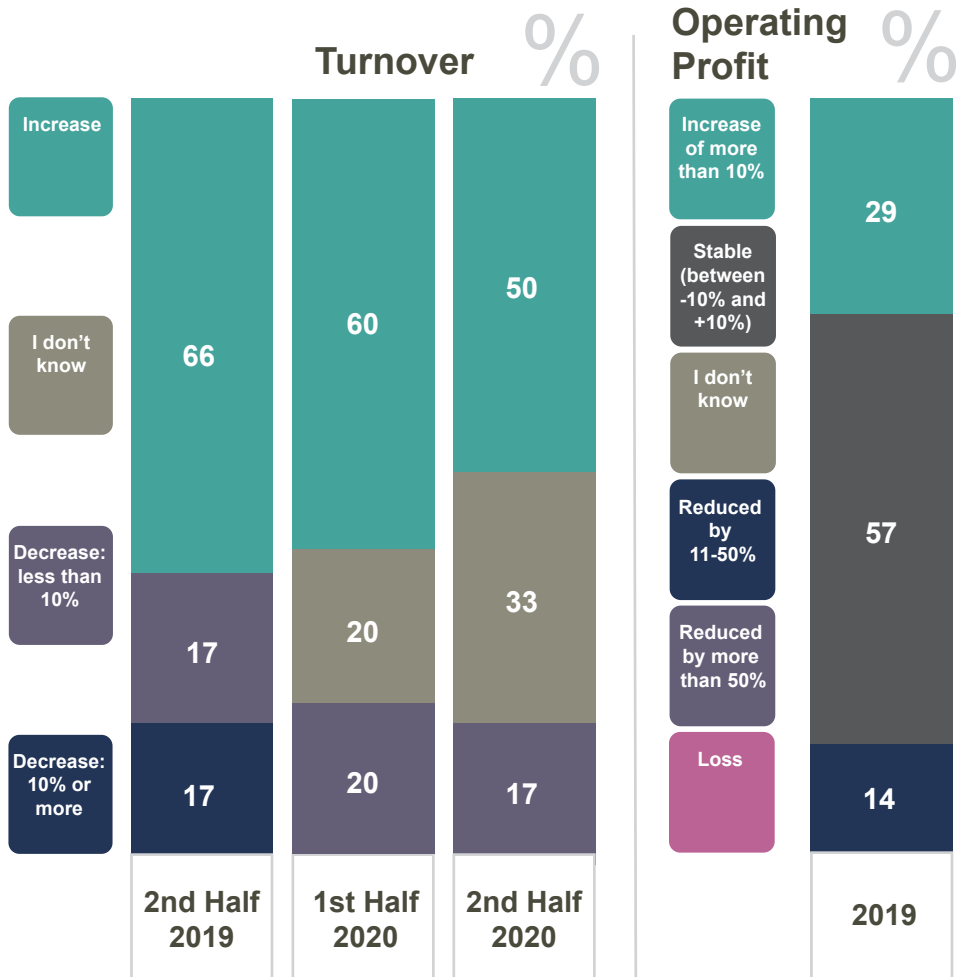
	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
India	2.8 / 5.0	2.8 / 5.0	3.5 / 5.0	2.2 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?

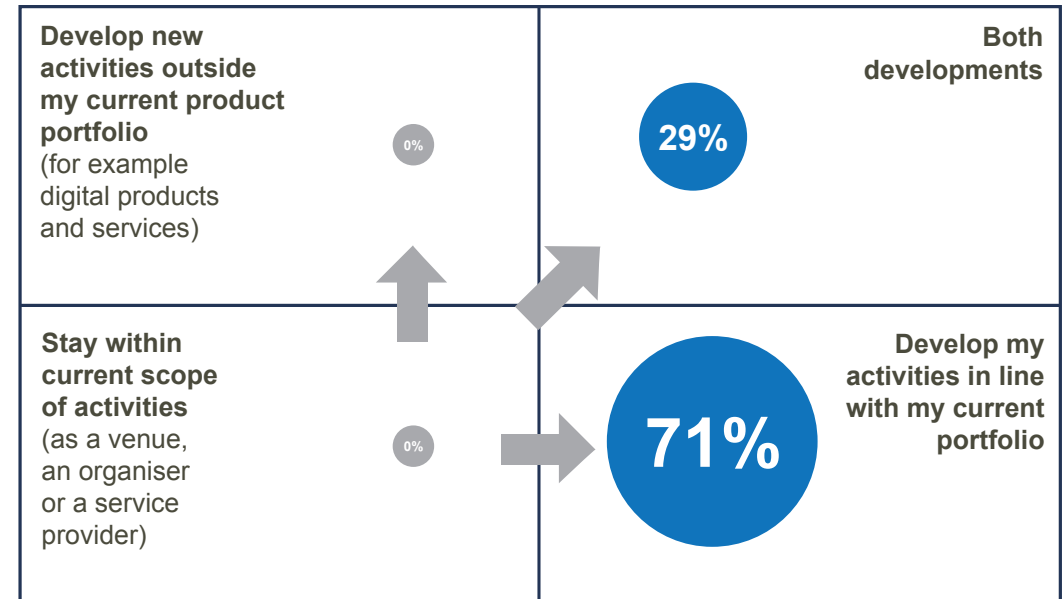




## Financial expectations of Indonesian exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure



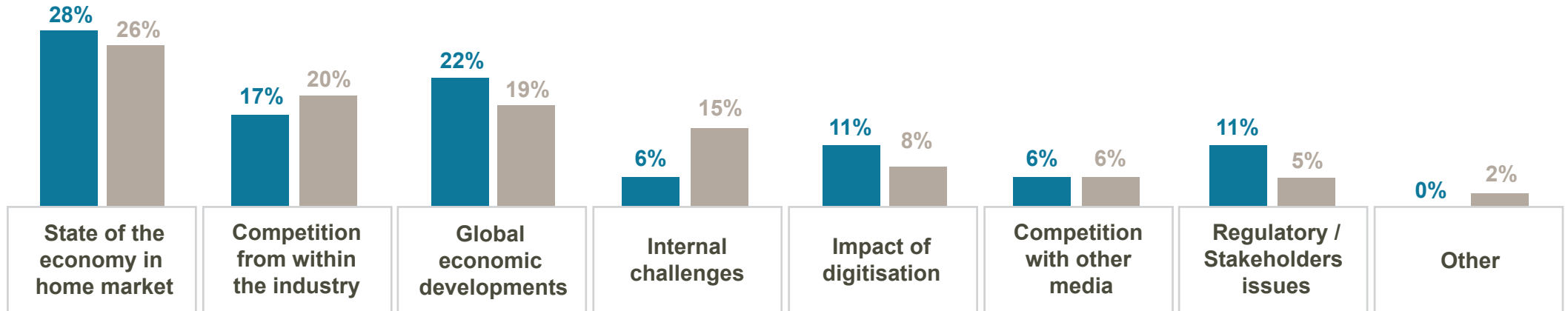
# Detailed results for Indonesia



## Most important business issues in the exhibition industry in Indonesia and globally

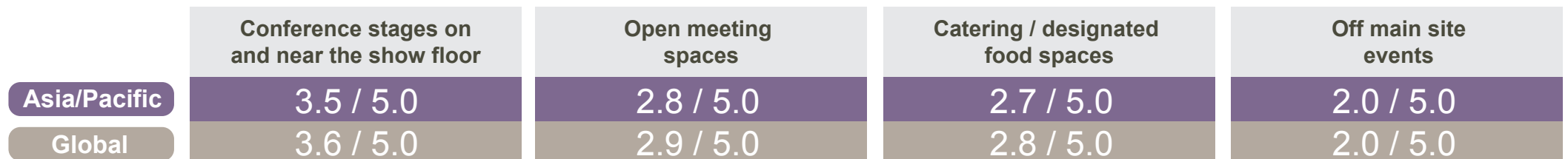
Indonesia

Global



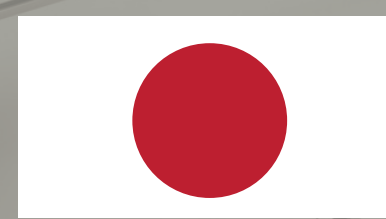
## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

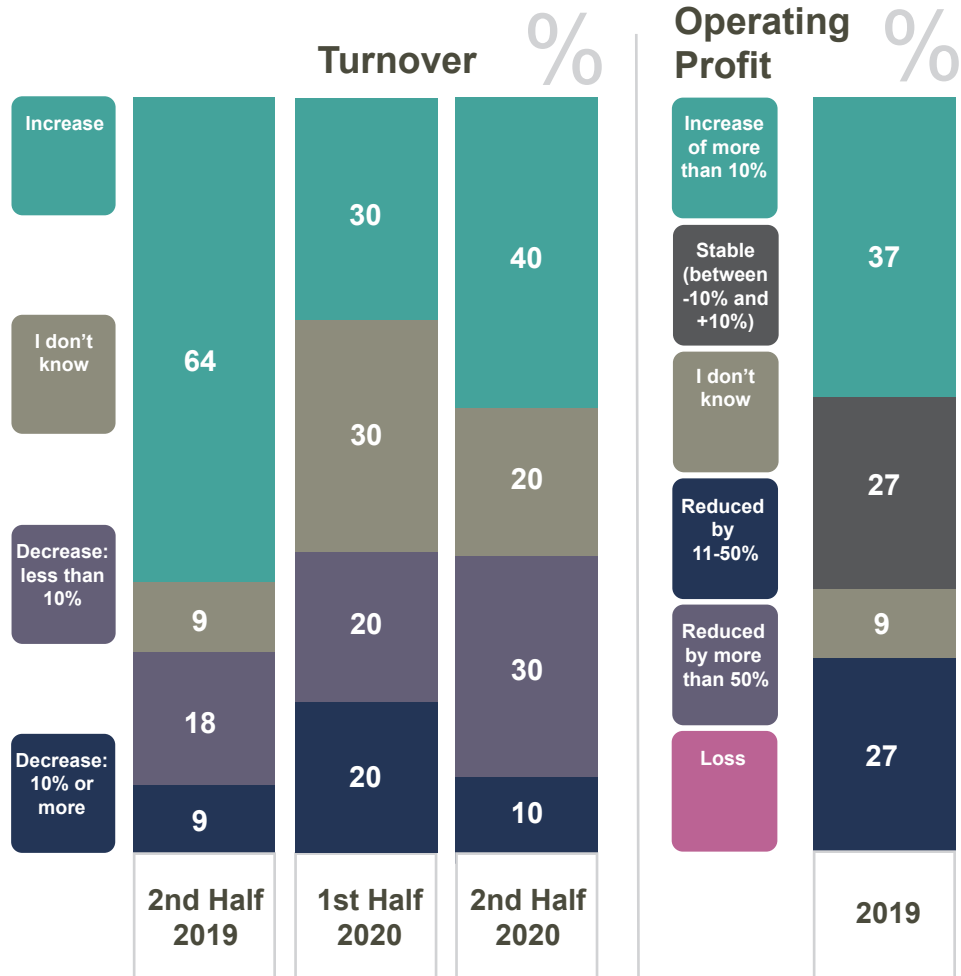


What share of your total space available is used for the respective purposes during your exhibitions?

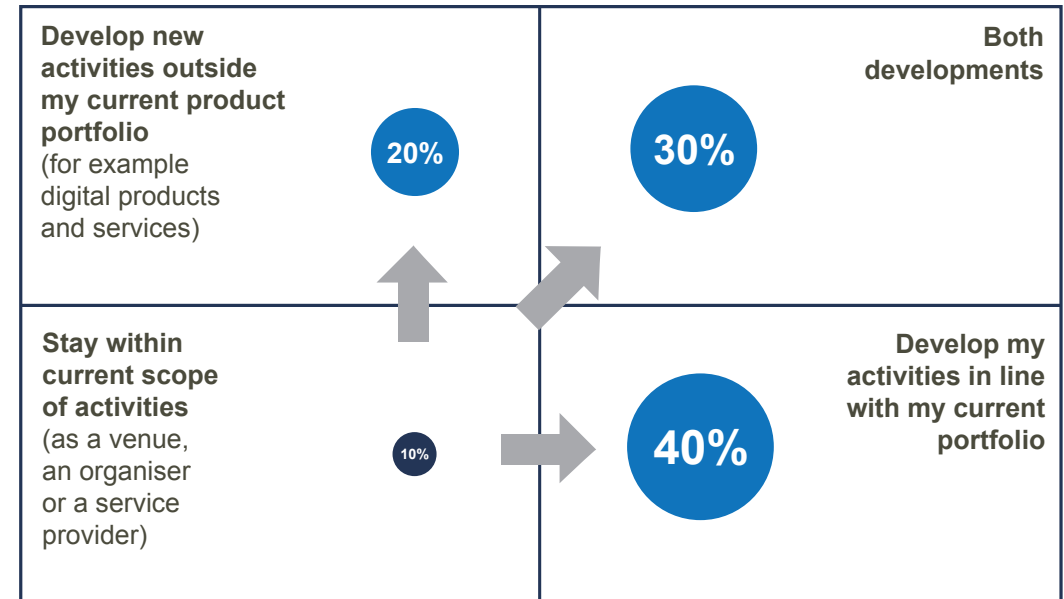




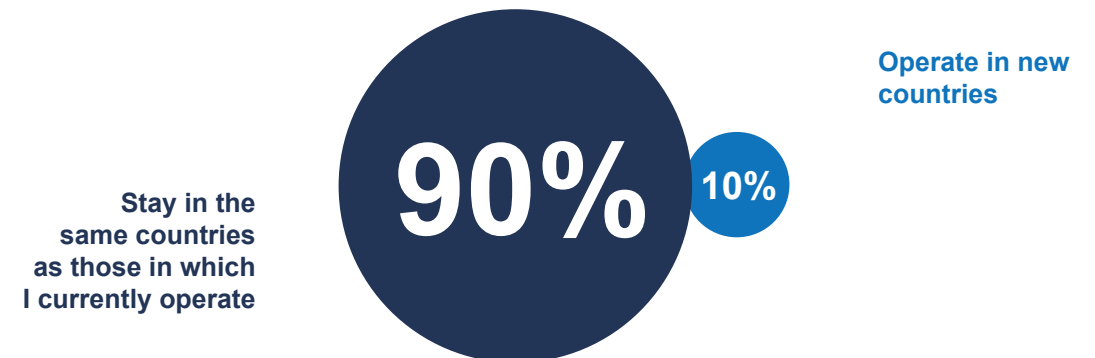
## Financial expectations of Japanese exhibition companies compared to previous years

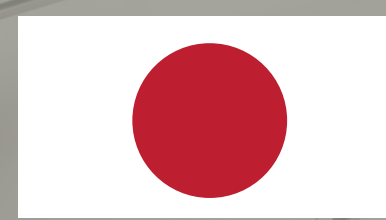


## Current strategic priorities related to the range of activities



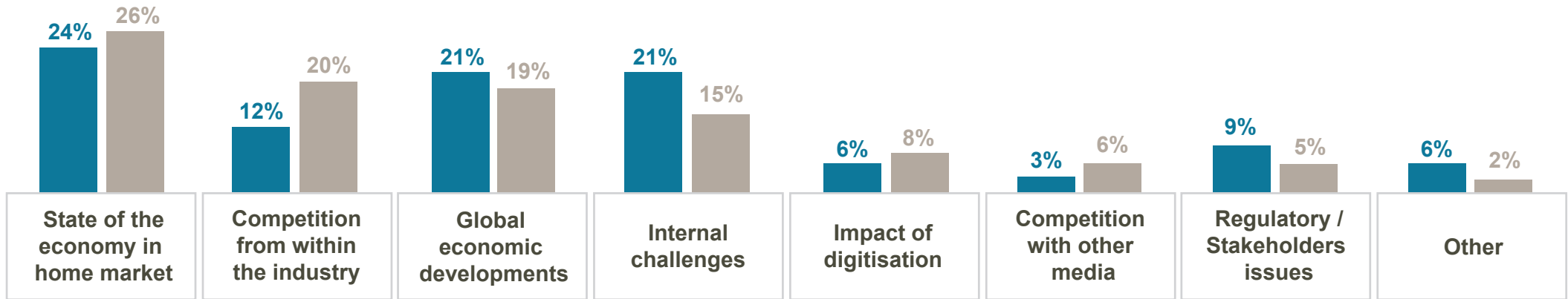
## Current strategic priorities related to geographic exposure





## Most important business issues in the exhibition industry in Japan and globally

Japan Global

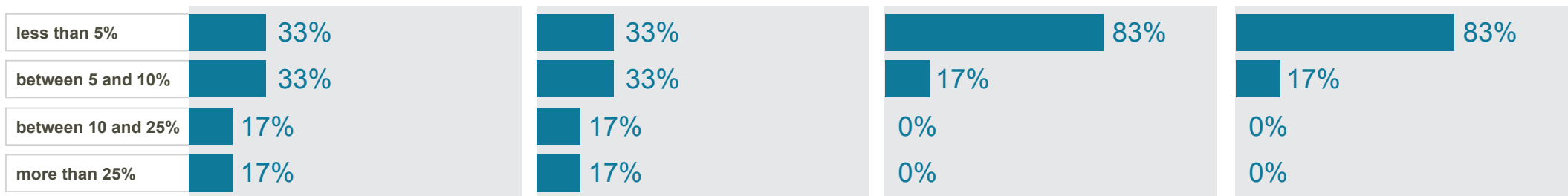


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

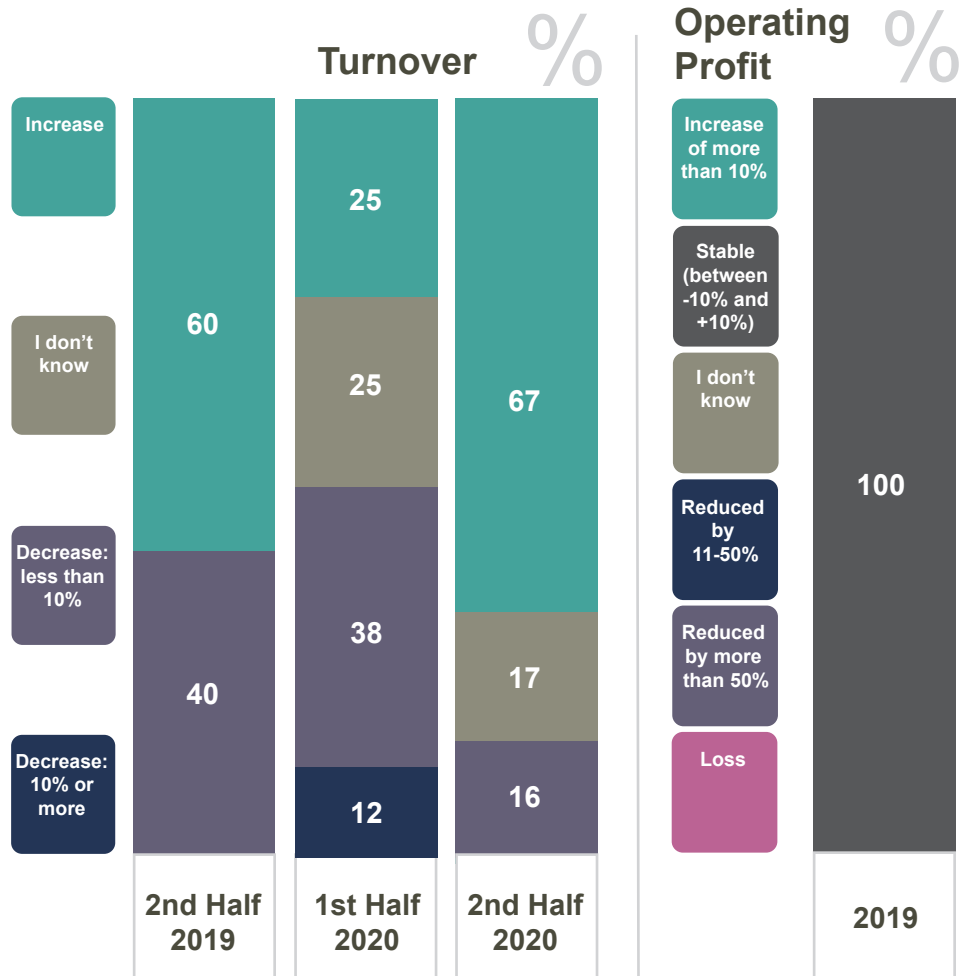
	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Japan	3.8 / 5.0	3.3 / 5.0	1.9 / 5.0	1.9 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?

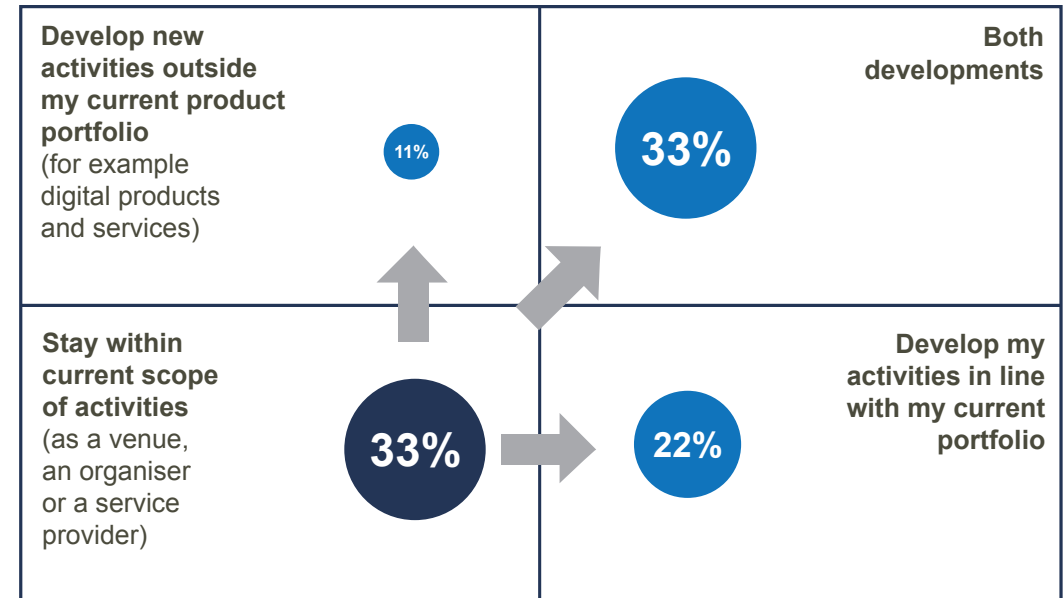




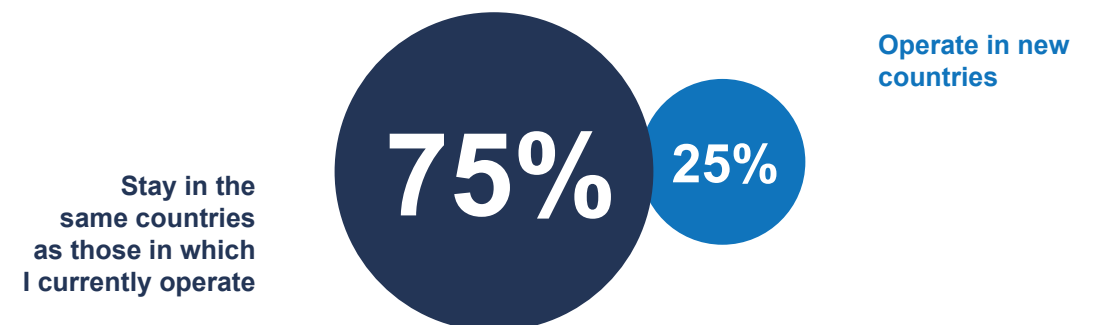
## Financial expectations of Macau exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



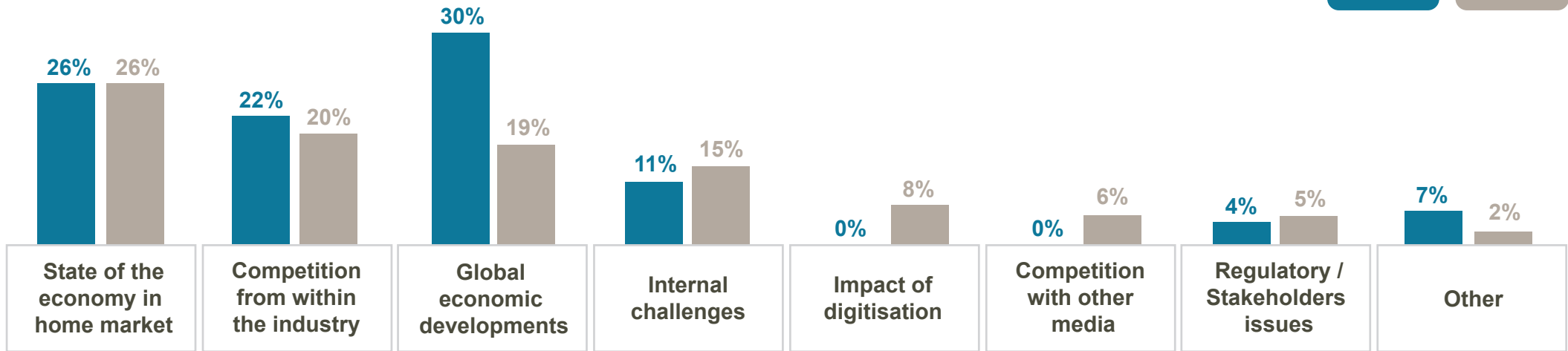
## Current strategic priorities related to geographic exposure





## Most important business issues in the exhibition industry in Macau and globally

Macau Global

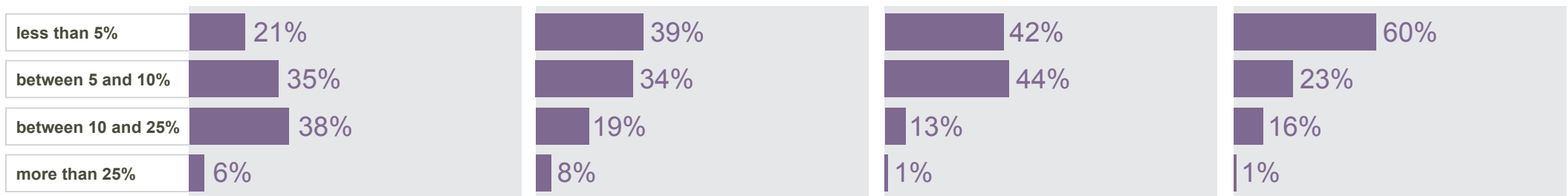


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Asia/Pacific	3.5 / 5.0	2.8 / 5.0	2.7 / 5.0	2.0 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

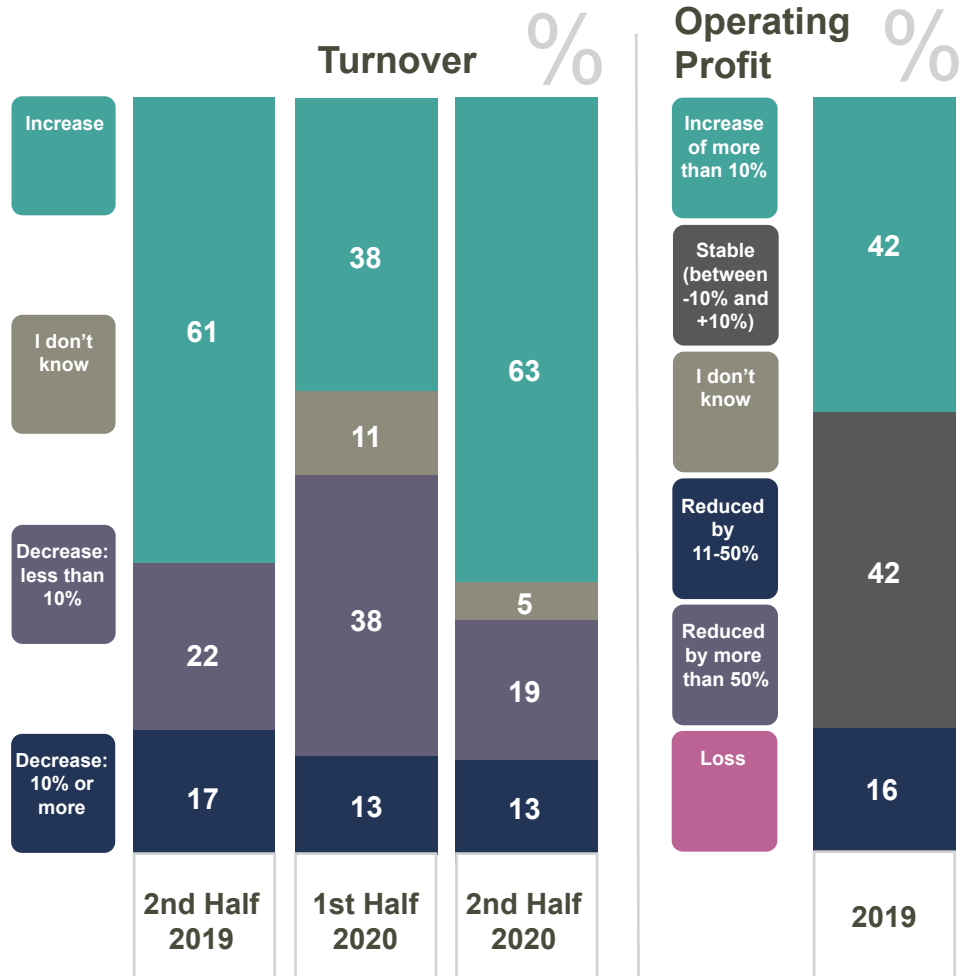
What share of your total space available is used for the respective purposes during your exhibitions?



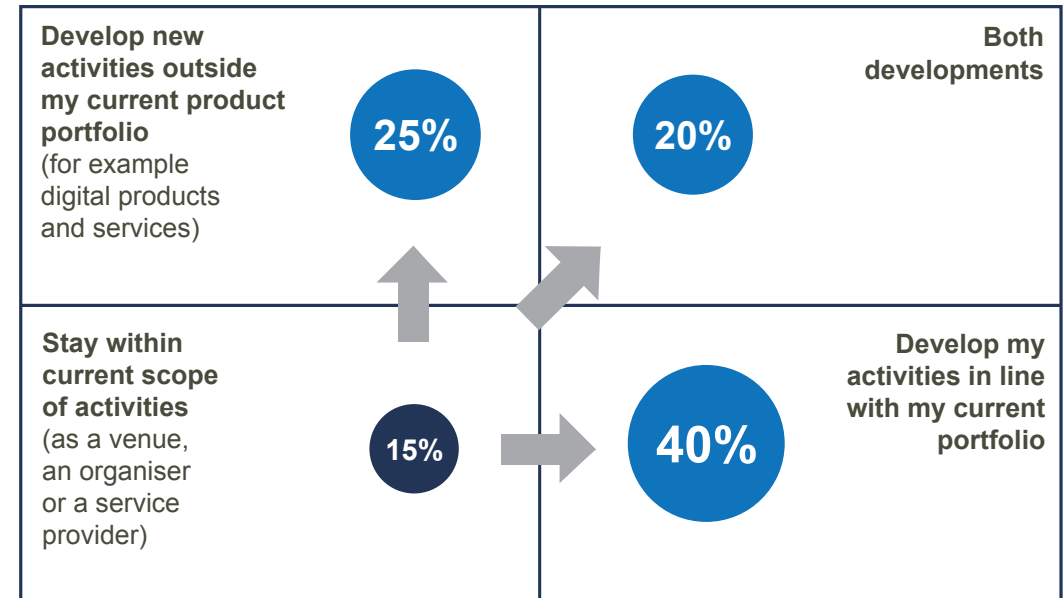




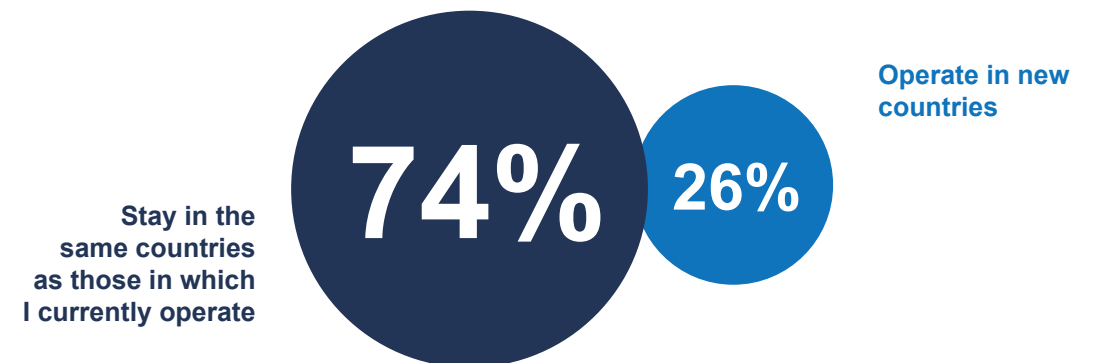
## Financial expectations of Thailand exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure



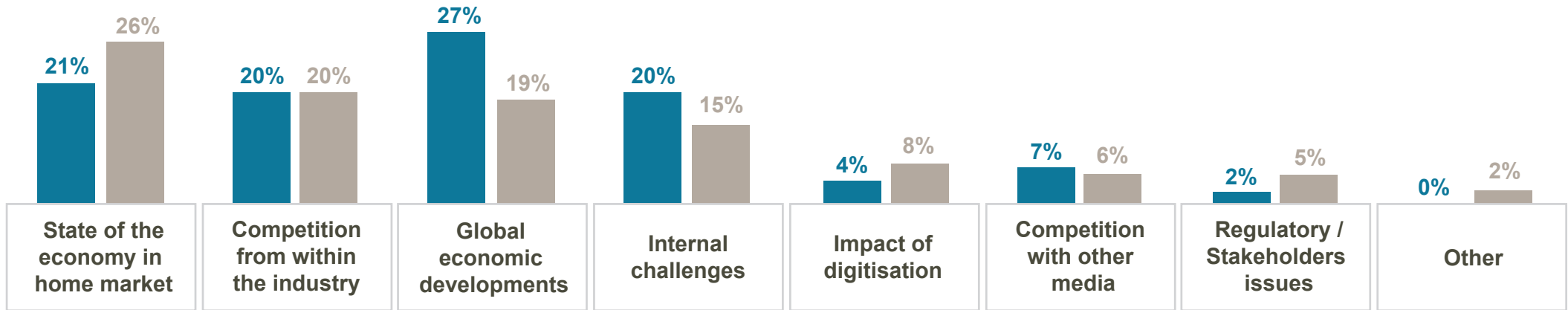
# Detailed results for Thailand



## Most important business issues in the exhibition industry in Thailand and globally

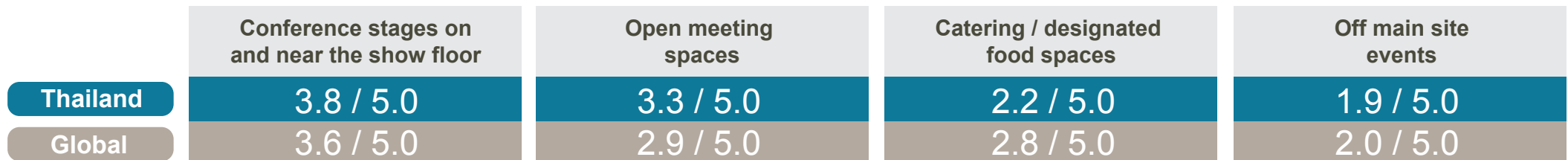
Thailand

Global

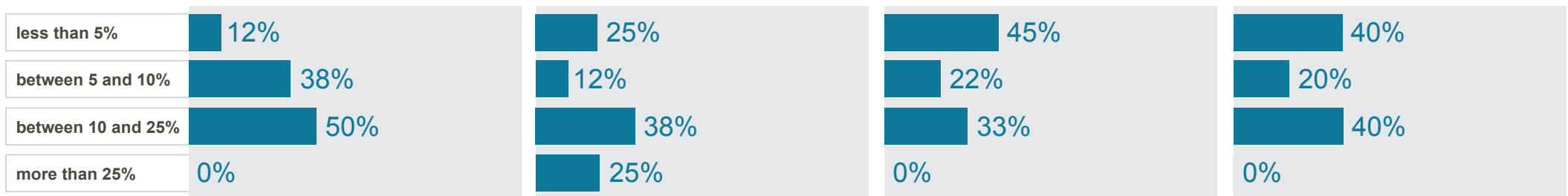


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

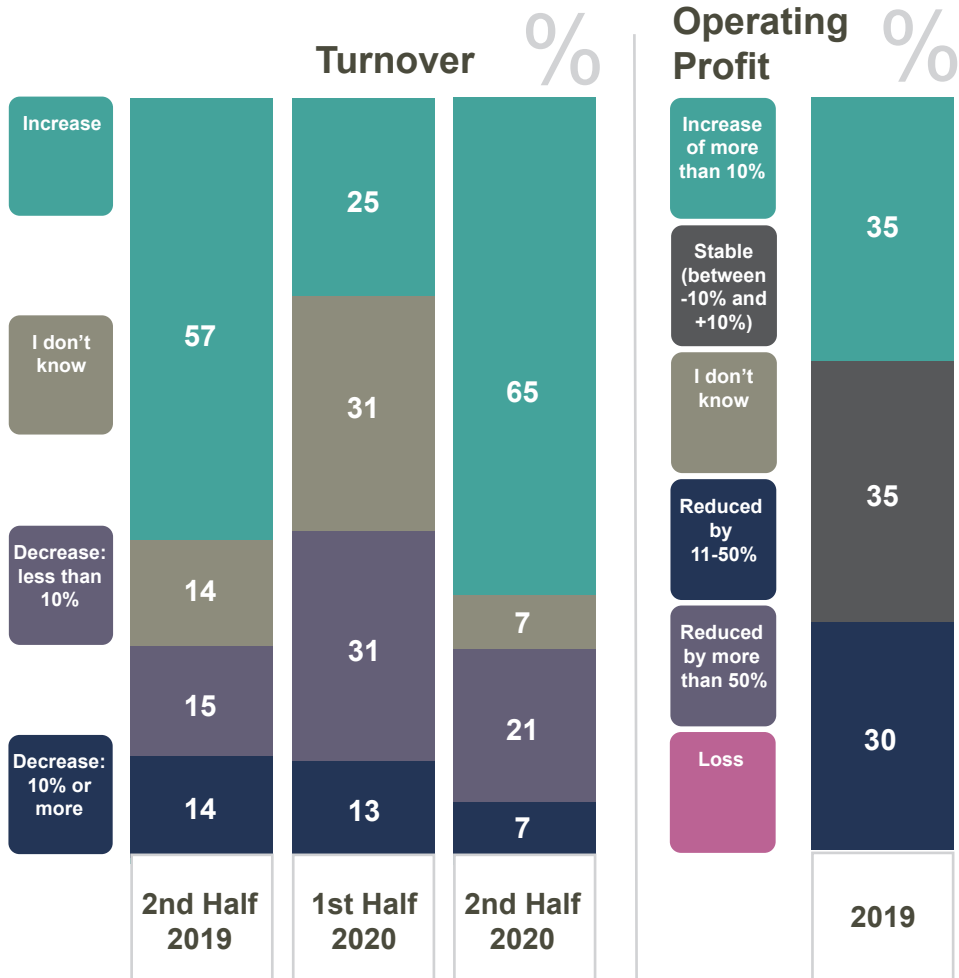


What share of your total space available is used for the respective purposes during your exhibitions?

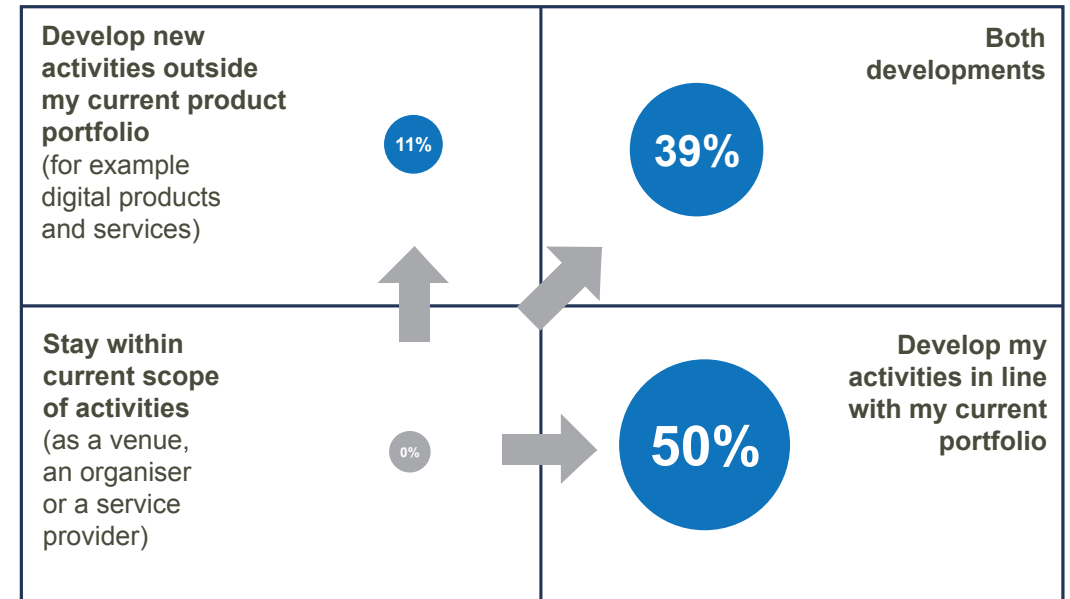


# Detailed results for other countries in Asia - Pacific

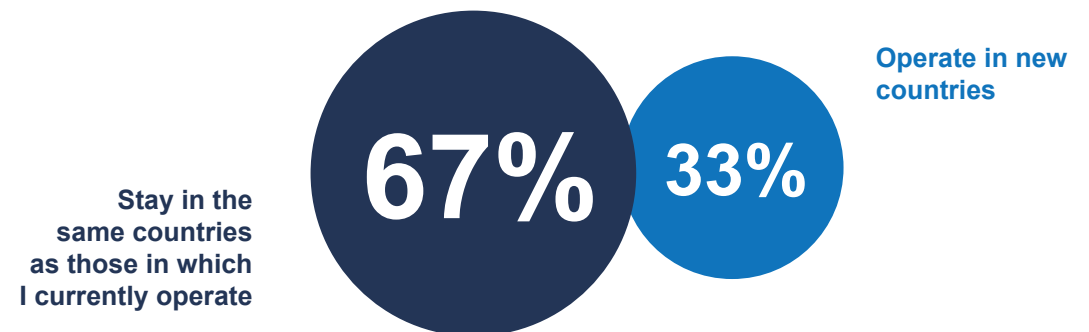
## Financial expectations of other countries in Asia - Pacific exhibition companies compared to previous years



## Current strategic priorities related to the range of activities



## Current strategic priorities related to geographic exposure

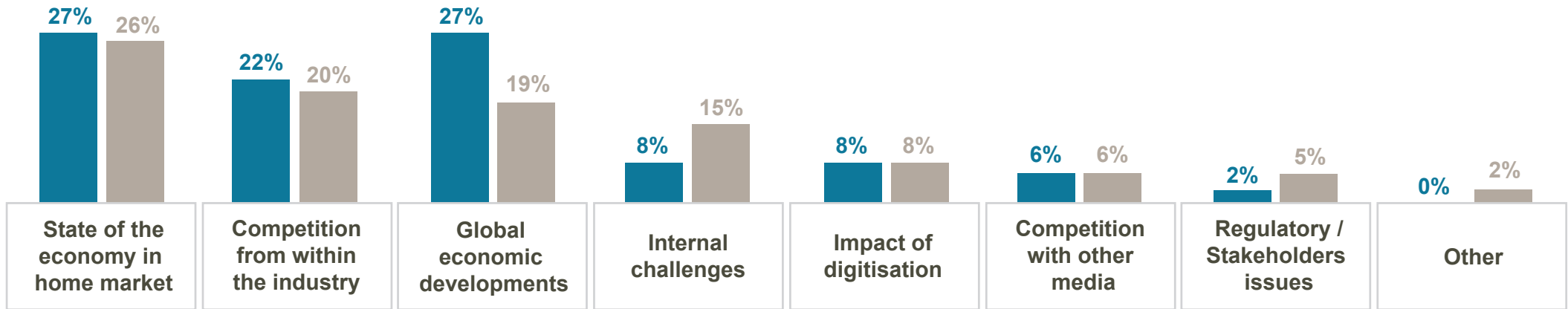


# Detailed results for other countries in Asia - Pacific

## Most important business issues in the exhibition industry in other countries in Asia - Pacific and globally

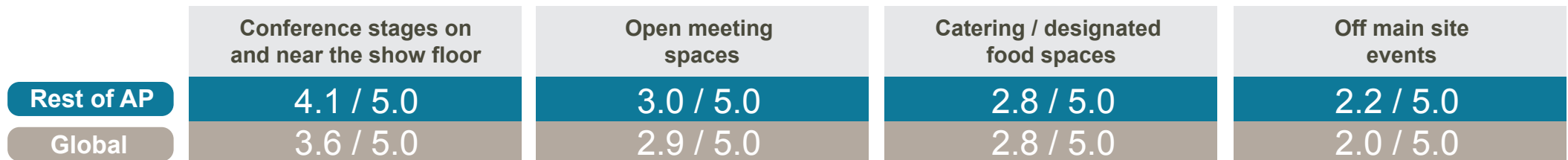
Rest of AP

Global

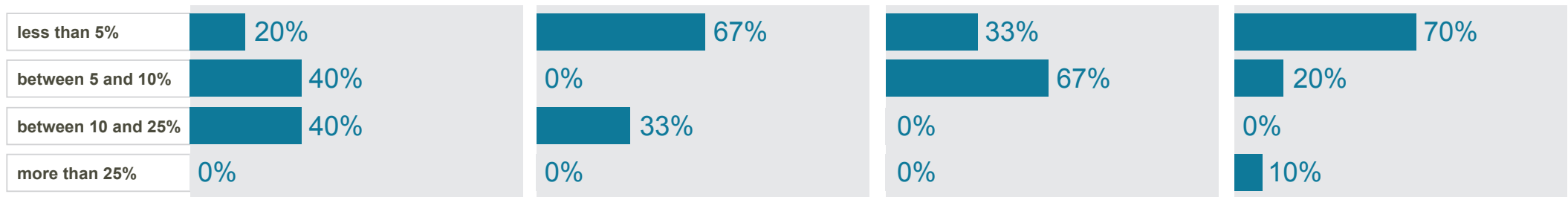


## Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



What share of your total space available is used for the respective purposes during your exhibitions?



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. **This 24th survey was concluded in early January 2020, which means that the current “Wuhan virus” issue was not yet known.**

The survey was answered by a record number of 438 companies from 70 countries / regions. The results are detailed for 22 geographical zones, including 18 major countries and regions markets.

The survey results reveal a positive outlook in terms of **operating profit**, with at least 70% of companies in each of the four regions maintaining a good level of performance in 2019 compared to 2018. In terms of gross turnover, a majority of companies from all regions also expect increases. However, strong levels of uncertainty can be noticed in many countries, especially in Asia/Pacific and Latin America.

When asked about the **most important issues for their business** in the coming year, companies remain concerned about the following 4 topics: “State of the economy in home market” (26% in the current survey, up 2% compared to 6 months ago), “Competition from within the industry” (20% in the current survey, up to 1% compared to 6 months ago), “Global economic developments” (19% in the current survey, same compared to 6 months ago) and “Internal challenges” (16% in the current survey, down 1% compared to 6 months ago).

In terms of **strategy**, in all regions, a large majority of companies intend to develop new activities, in either the classic range of exhibition industry activities (venue/organiser/services), or outside of the current product portfolios, or in both. In terms of geographical expansion, on average

globally, more than one company out of three declares an intention to develop operations in new countries.

Finally, the survey tackled the evolution of the business model for exhibitions and the levels of implementation of specific features; results indicate a major use of “conference stages on and near the show floor” (3.6 out of a scale of 5), followed by “open meeting spaces” (2.9) and “catering/ designated food spaces” (2.8). “Off main site events” are, in comparisons, less often implemented (2.0). Results also indicate that these features occupy on average less than 10% of the total space of the exhibitions.

**THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!**

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

# Appendix: Number of survey replies per country

## Total = 438 (in 70 countries/regions)

<b>North America</b>	<b>40</b>	Europe	<b>102</b>	<b>Middle East</b>	<b>27</b>
Canada	4	Albania	1	Algeria	1
Mexico	21	Austria	1	Bahrain	1
USA	15	Belgium	2	Iraq	1
		Croatia	1	Jordan	1
<b>Central &amp; South America</b>	<b>77</b>	Czech Republic	1	Kuwait	2
Argentina	10	France	2	Lebanon	2
Bolivia	5	Georgia	1	Oman	1
Brazil	13	Germany	17	Qatar	3
Chile	6	Greece	4	Saudi Arabia	5
Colombia	15	Hungary	2	United Arab Emirates	10
Costa Rica	2	Italy	12		
Ecuador	6	Poland	3	<b>Asia / Pacific</b>	<b>162</b>
El Salvador	3	Portugal	3	Australia	27
Guatemala	2	Romania	1	Azerbaijan	2
Honduras	2	Russia	22	China	35
Panama	4	Serbia	1	India	26
Paraguay	1	Slovenia	1	Indonesia	10
Peru	4	Spain	2	Japan	14
Uruguay	4	Sweden	3	Kazakhstan	1
		The Netherlands	4	Macau	10
<b>Africa</b>	<b>29</b>	Turkey	4	Malaysia	2
Egypt	2	Ukraine	1	New Zealand	1
Morocco	1	United Kingdom	13	Pakistan	2
Rwanda	1			Philippines	1
South Africa	25			Singapore	4
				South Korea	4
				Thailand	21
				Vietnam	3



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