

UFI Global Exhibition Barometer

30th Edition

Report based on the results of a survey concluded in January 2023



Global



India



Southern Africa



Japan



United Kingdom



Macau



Spain



Malaysia



Peru



Saudi Arabia



Central & South America



Singapore



South Korea



US



Mexico



Greece



Argentina



Thailand



Indonesia



Brazil



Australia



France



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 – Report 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 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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The Las Vegas Convention and Visitors Authority (LVCVA) is charged with marketing Southern Nevada as the premier tourism and convention destination worldwide.

For a record 26 consecutive years, Las Vegas has been named the No. 1 trade show destination in North America by Trade Show News Network. In 2019, Las Vegas hosted more than 22,000 meetings, conventions and incentive programs, ranging in size from 10 to more than 150,000 attendees. Also known as the Greatest Arena on Earth, Las Vegas has evolved tremendously in recent years and continues to capture the world's imagination, because what happens in Vegas, only happens in Vegas.



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Welcome to the 30th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey that was conducted in December 2022. It represents up-to-date information on the status and outlook of the global exhibition industry as well as on 21 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 2 years to create an overall assessment of 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 367 companies participating from 56 countries and regions.

We wish to thank the following associations, whose participation made 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 & 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, SCEGA (Saudi Conventions & Exhibitions General Authority) in Saudi Arabia, SECB (Singapore Exhibition & Convention Bureau) in Singapore, SISO (Society of Independent Show Organizers) for the US, SOKEE (Greek Exhibition Industry Association) in Greece, TEA (Thai Exhibition Association) in Thailand, UBRAFE (União Brasileira dos Promotores Feiras) in Brazil and UNIMEV (French Meeting Industry Council) in France.

Important remarks

- The number of replies to the current survey (367 total from 56 countries and regions - see the 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 21 markets where a significant number of answers were obtained.
- Due to decimal rounding, the percentage values indicated in some charts may not exactly sum up to 100%. This applies in particular to the charts related to public financial support.

Questions related to this survey can be sent to research@ufi.org
This research is available online at www.ufi.org/research

The 30th Barometer surveyed participants' monthly operations starting from July 2022, qualifying their level of activity as "normal", "reduced" or "no activity". It also gauged their predicted level of activity for the period up until June 2023.

Companies were also asked what the overall status of operations in their cities was and what specific measures they considered to be most important for the full recovery of exhibitions.

The level of operations continues to improve globally: the proportion of companies declaring a "normal activity" gradually increased between January and December 2022 from 30% to 72% and it is expected to reach 80% in June 2023. The highest levels of "normal activity" for the first half of 2023 on average are expected in Brazil (98%), Turkey and the US (95%), the UK (90%), Italy and Thailand (88%), and Spain and UAE (85%). In China, only 29% expect a normal activity, and 40% a reduced one.

This overall very positive outlook is driven by the fact that exhibitions can now be held everywhere in the world, except in some places in China. In parallel, new hygiene measures are reported in several regions (in more than 20% of respondents in Malaysia, Saudi Arabia and Thailand). In China alone, as of December 2022, and combining all markets, 55% of respondents declared that exhibitions could be held (usually with hygiene measures), 17% reported that "only local events" were and 28% said that events were still not allowed.

When asked what specific measures could be implemented to support the ongoing recovery of exhibitions:

- 51% of respondents selected "Readiness of exhibiting companies and visitors to participate again", while 45% selected "Financial incentive packages".

- Detailed results indicate that several markets are also largely impacted by travel restrictions [that apply to foreign visitors] or public policies that apply locally to exhibitions: 74% of respondents in China, 62% in Germany and 38% in the US.
- One in five companies globally say that no specific measures are needed, but the proportion varies from none in several markets (Argentina, Chile, China and Mexico) to one company in two or more in the UK (50%), France (53%) and the UAE (58%).

Exhibition organizers participating in this edition of the Barometer were also asked to evaluate the "hosted buyers" packages, whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies.

Global results indicate that:

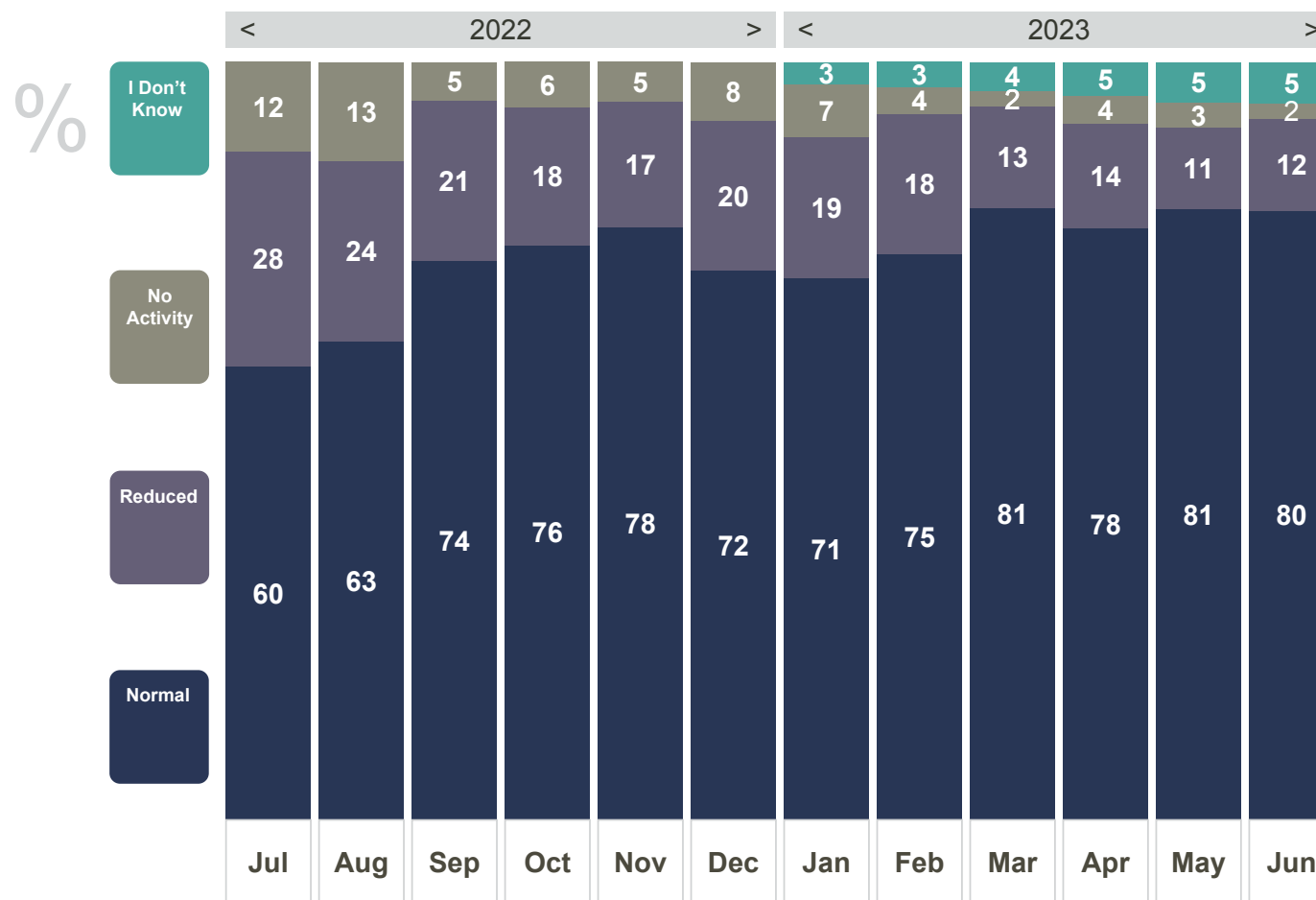
- Half of the respondents apply this concept.
- While one in four of those who use it report they are happy with the programmes, two-thirds declare having mixed results.

National results highlight contrasted situations:

- The concept appears to be largely implemented in Argentina, Italy, Turkey, the UK and Thailand but not so much in the US, Germany, South Africa or Australia.
- When it is implemented, the highest scores in terms of satisfaction are identified in Germany, Mexico, the UAE and the US while the lowest scores are in Australia, India, Saudi Arabia, South Africa and Thailand.

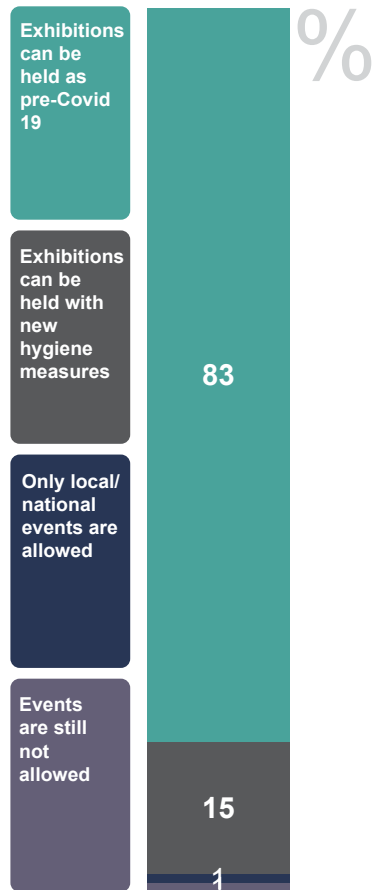


Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023

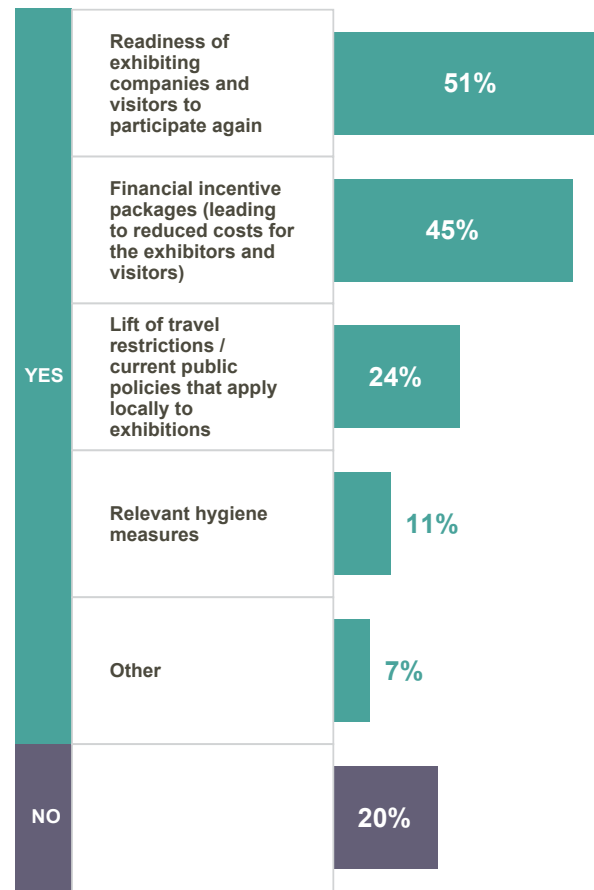




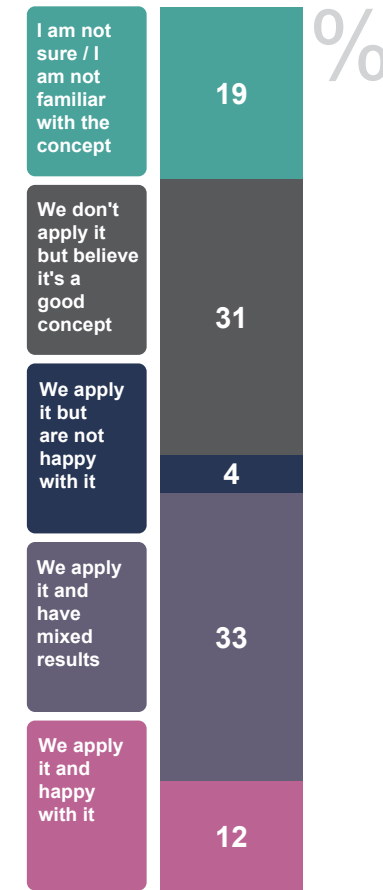
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



For organisers only (257 answers in total)

The 30th Barometer asked participants for their company's predicted gross turnover for 2022, and their expectations for 2023, compared to 2019. The survey also sought insights on the evolution of operating profits for 2022 and 2023, also compared to 2019.

The following charts present:

- Revenues from 2022, and projections for 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 and 2023 operating profits compared to those for 2019.

The “bounce back” of exhibitions has happened in 2022 and companies from most markets plan to deliver revenues close to their 2019 levels. Globally, on average and excluding China, the revenues for 2022 and 2023 represent 80% and 94% of 2019 levels.

Colombia, France, Saudi Arabia, Spain, and Turkey have performed well above this average in 2022 and the UK will join that group in 2023.

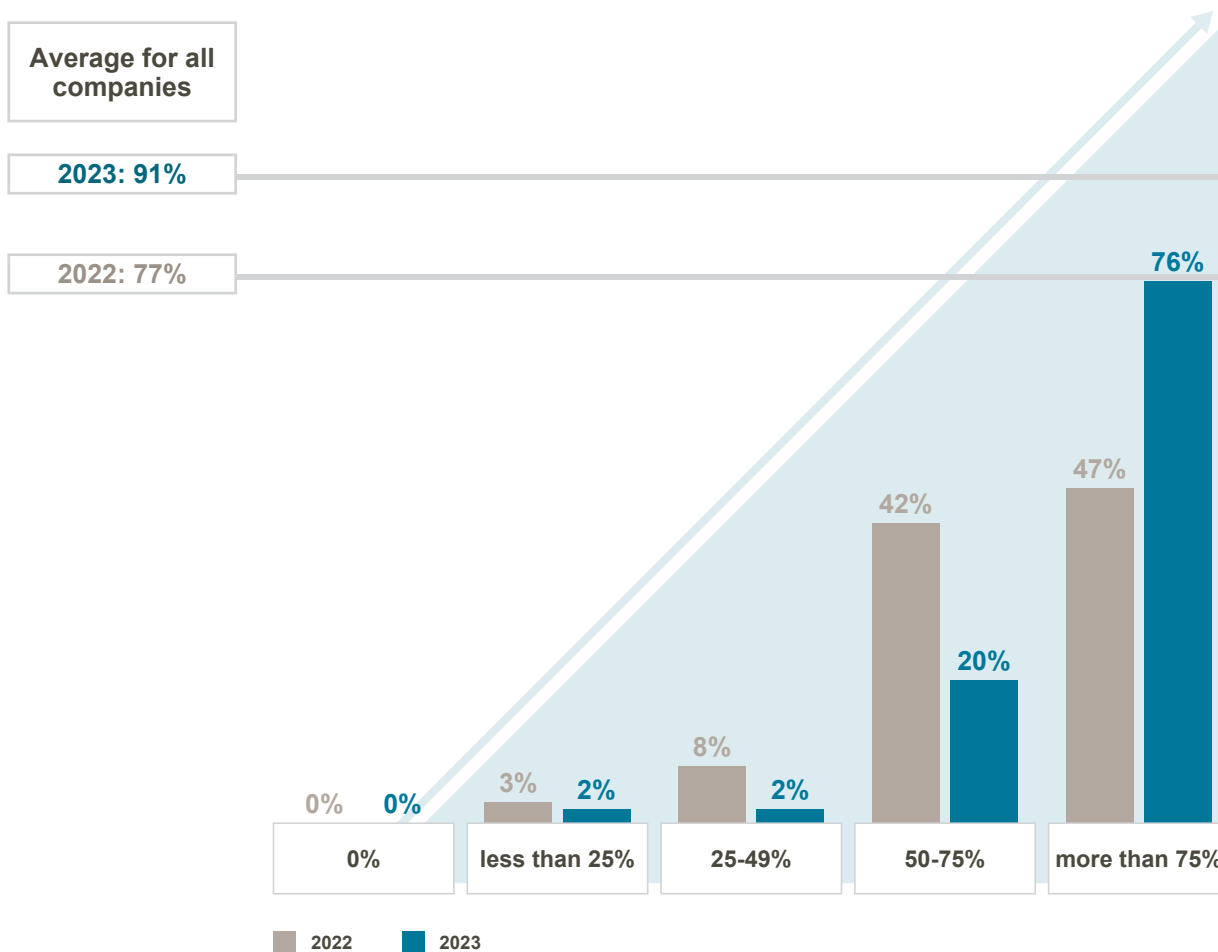
In terms of operating profit, around half of the companies are declaring an increase or stable level for 2022 compared to 2019 levels and increasing to 7 out of 10 for 2023.

The markets in all the countries analysed are above those levels in either 2022 or 2023, or both, except China, Germany, Italy, Thailand, and the US.

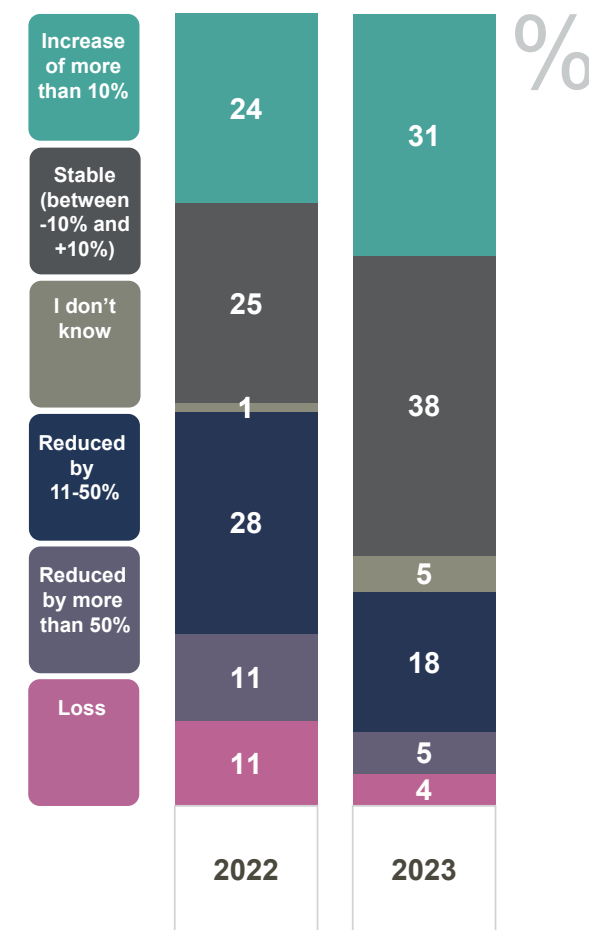
Globally, 4% of respondents expect a loss for 2023, compared to 11% for 2022. The highest proportion of companies expecting a loss in 2023 is declared in China (18%), Germany (17%) and Italy (11%).



Revenue compared to 2019



Operating Profits compared to 2019



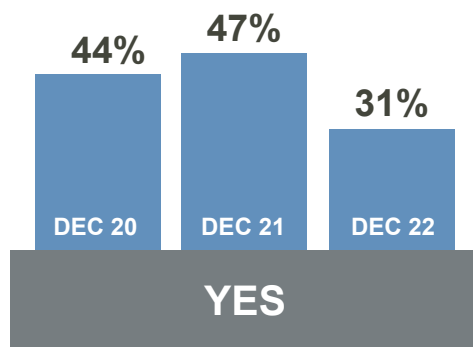
The 30th Barometer surveyed the impact of public financial support in response to the COVID-19 crisis in 2022. Overall, 69% of companies received no public financial support in 2022, but for the half of those that did, this aid represented less than 10% of their overall costs.

While the highest proportions of companies receiving public financial support are identified in Europe and Asia-Pacific, there are significant differences across all regional markets, and the percentages of companies declaring that they received “no public support” varies:

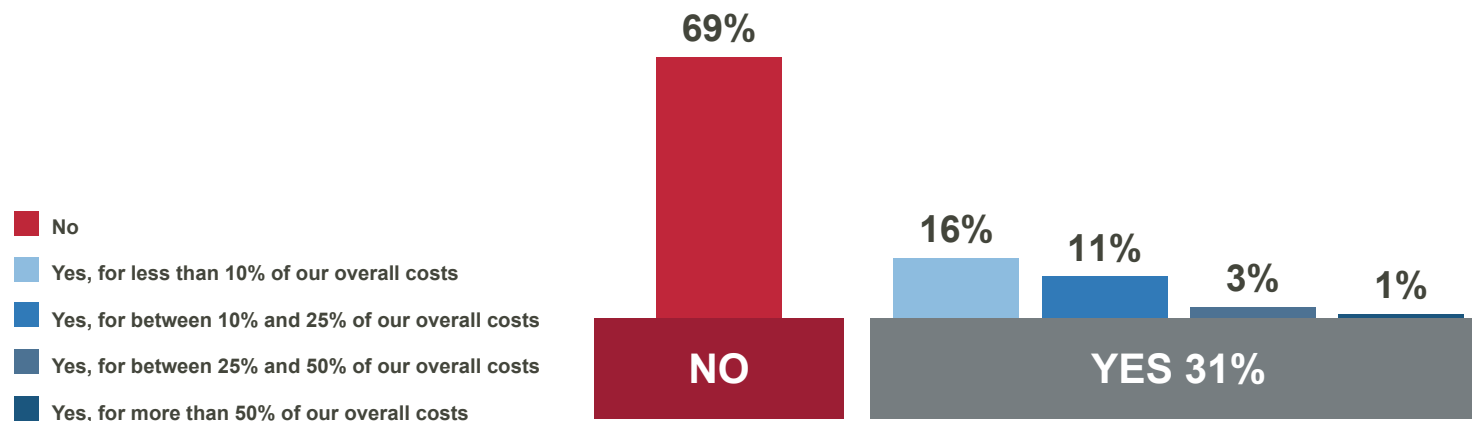
- from 69% in the US to 100% in Mexico, for North America
- from 53% in Brazil to 83% in Chile, for Central and South America
- from 12% in Greece to 86% in the UK, for Europe
- from 67% in Saudi Arabia to 91% in the UAE, for the Middle East and Africa
- from 19% in Malaysia to 100% in India, for Asia-Pacific.



Did your company benefit from public financial support?



In 2022



The 30th 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 into certain issues.

The following pages present the results and include an analysis of the trend of answers to this question over the last 7 years.

The latest results confirm that the “Impact of the COVID-19 pandemic on the business” is now the least pressing issue, globally speaking: only 5% of companies mark it as one of the most important (compared to 11% six months ago and 19% twelve months ago). In China, however, as of December 2022, it remains the most important one (with 18% of answers).

The most pressing business issue declared in this edition is “Internal management challenges” (20% of answers globally and the main one in all regions, and most markets). Within “Internal management challenges,” 67% of respondents selected “Human resources” issues, 44% selected “Business model adjustments”, and 31% selected “Finance”. For Germany, Italy, the UK and the US, however, “Global economic developments” has become the most pressing issue.

The “Impact of digitalisation” comes as the second most important issue globally (16% of answers), followed by “State of the economy in the home market” and “Global economic developments” (both 15%

of answers), and then “Competition with other media” comes next (14%, compared to 15% in the previous edition).

An analysis by industry segment (organiser, venue only and service provider) shows no differences with regard to the three most pressing issues, which remain “Internal management challenges”, “Impact of digitalisation” and “State of the economy in the home market”.

The analysis of the trend around top business issues over the 2015-2022 period identifies several important shifts:

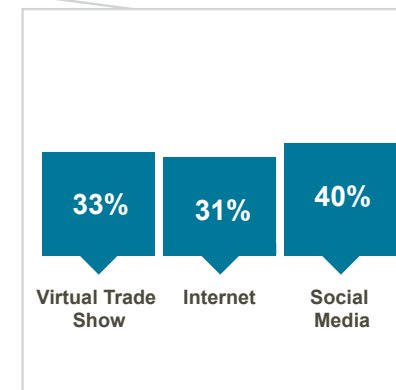
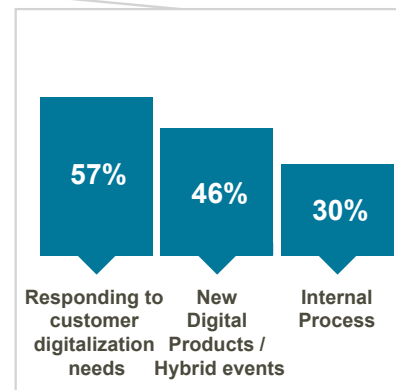
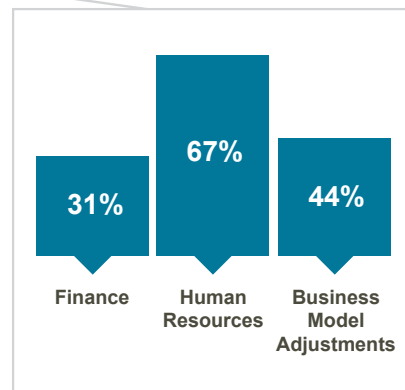
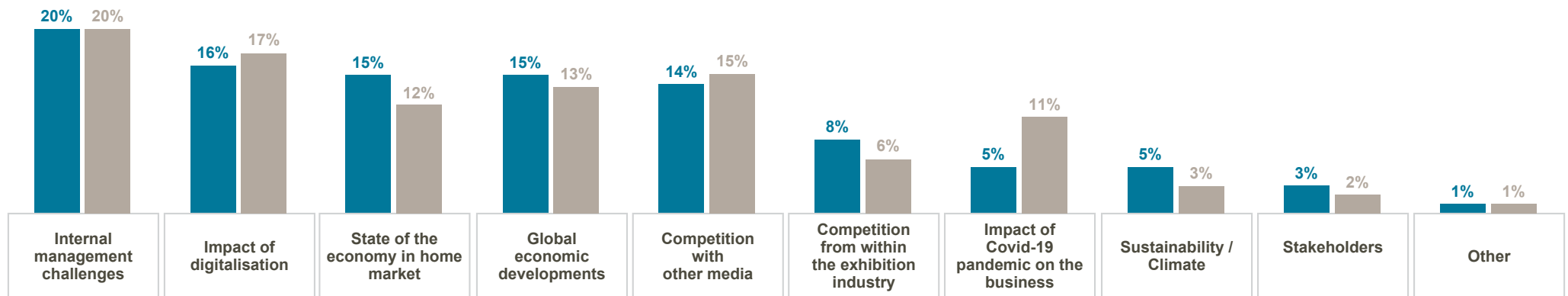
- “Impact of digitalisation/Competition with other media” now ranks as the leading issue, with 30% of answers (compared with 14% in 2015).
- “Global economic developments/State of the economy in the home market” have dropped from the top spot it held for years (44% of answers in 2015) to 22% in 2021 and 29% in 2022.
- “Internal management challenges” has increased from 14% in 2015 to 20% in 2022.

In parallel, “Sustainability/climate and other stakeholders’ issues” has doubled from 4% of answers in 2015 to 8% in 2022, while “Competition from within the exhibition industry” has dropped considerably, from 20% in 2015 to less than 8% in 2022.



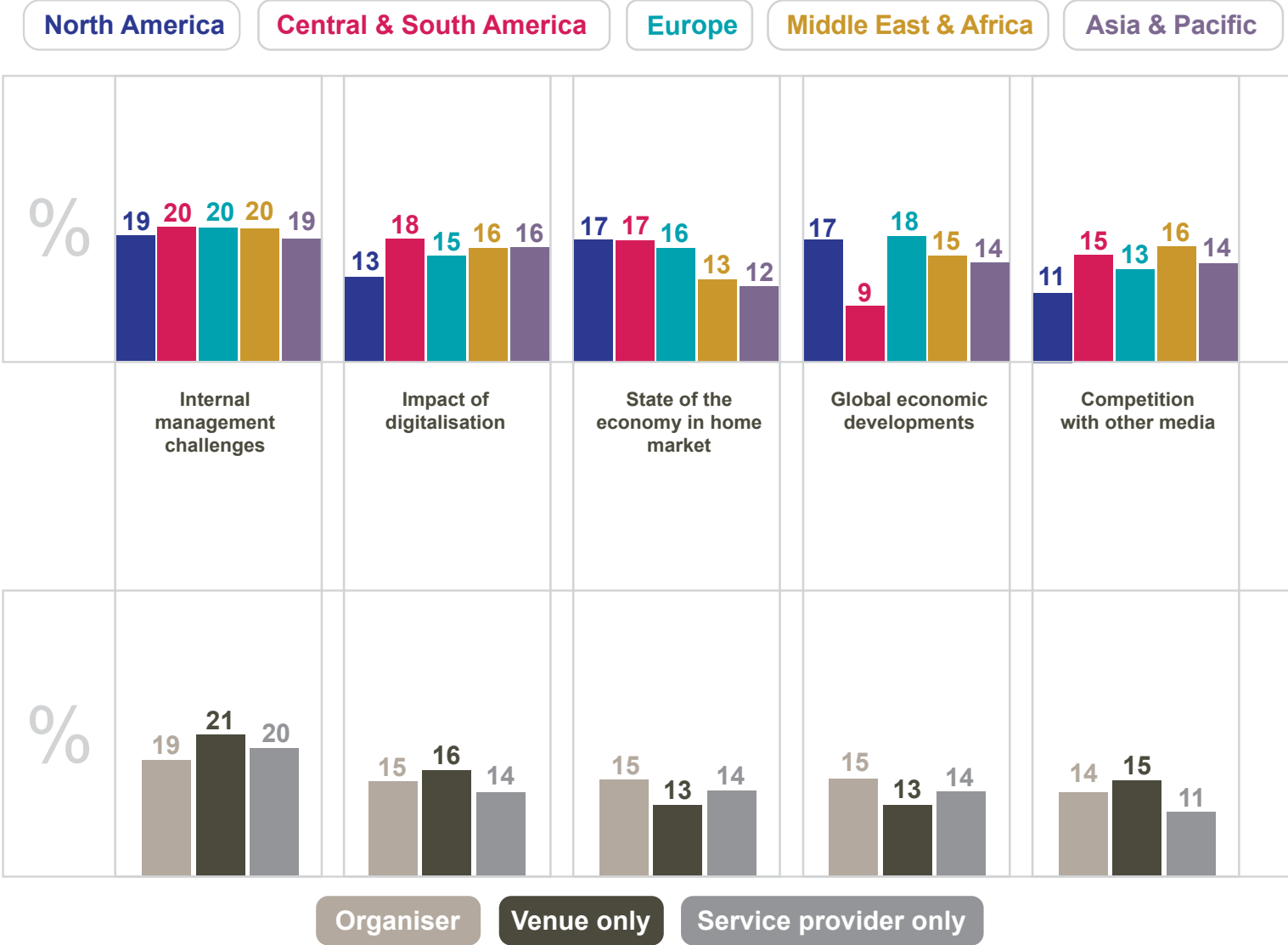
Results from current survey – December 2022

Results from previous survey – June 2022



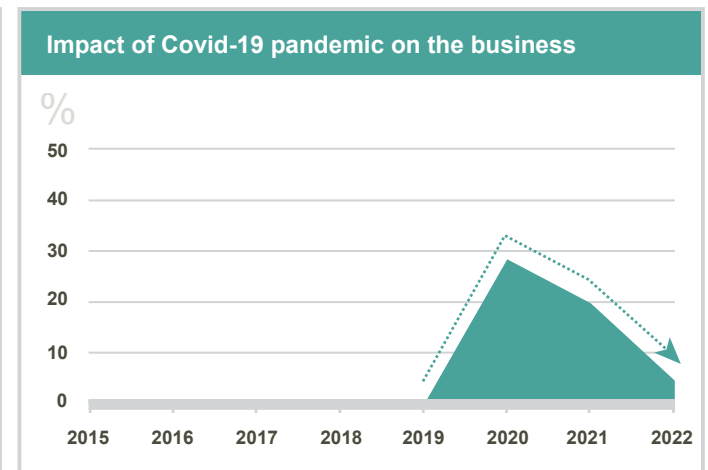
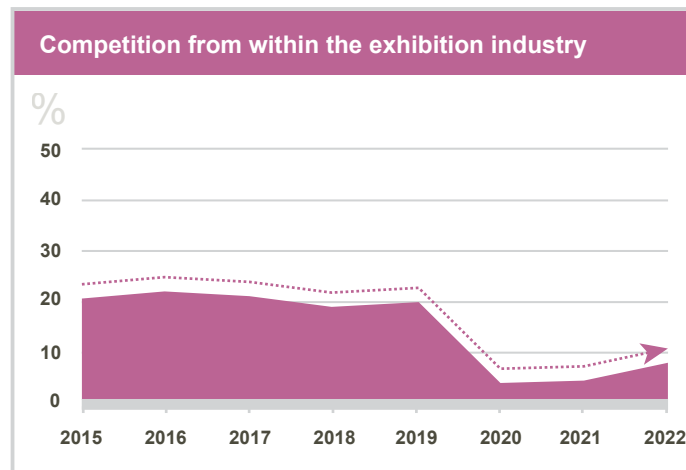
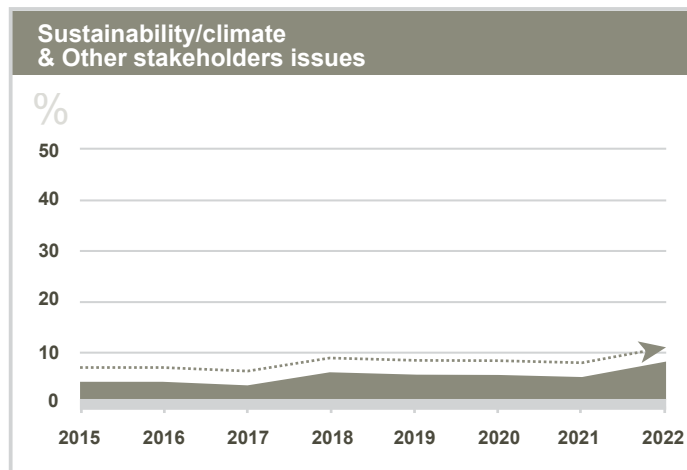
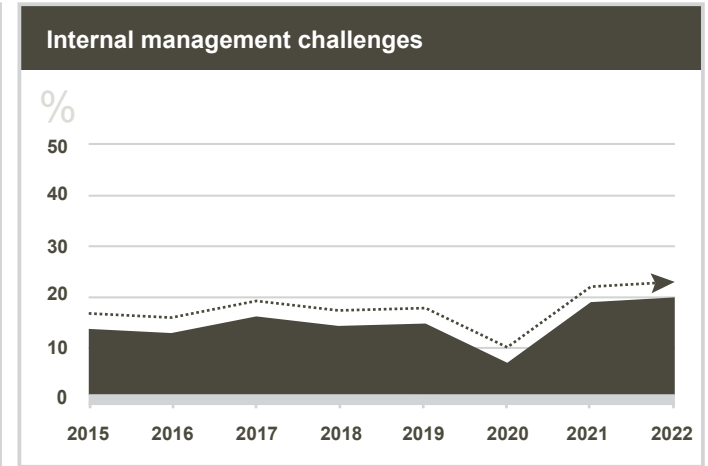
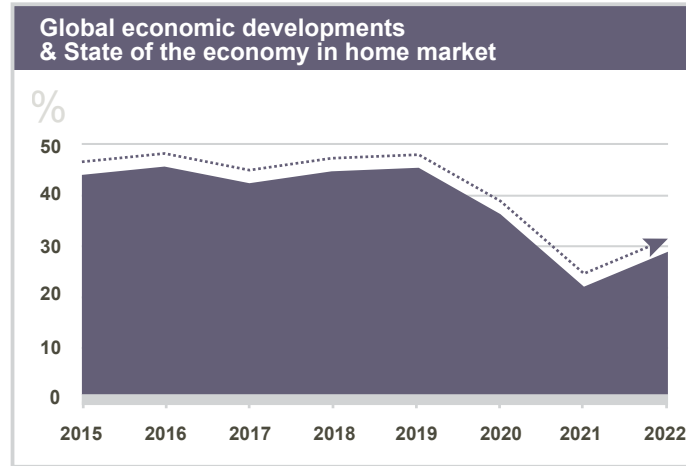
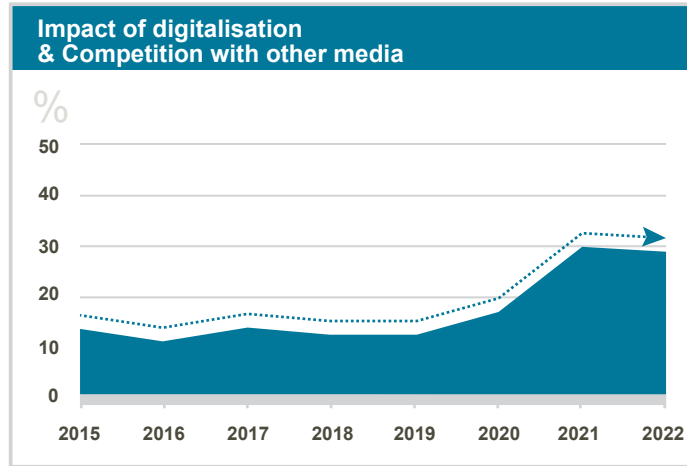
(multiple answers possible)

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





Most important business issues: 2015 - 2022 trends



The 30th 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 asked in previous editions of the Barometer, some useful comparisons can be drawn.

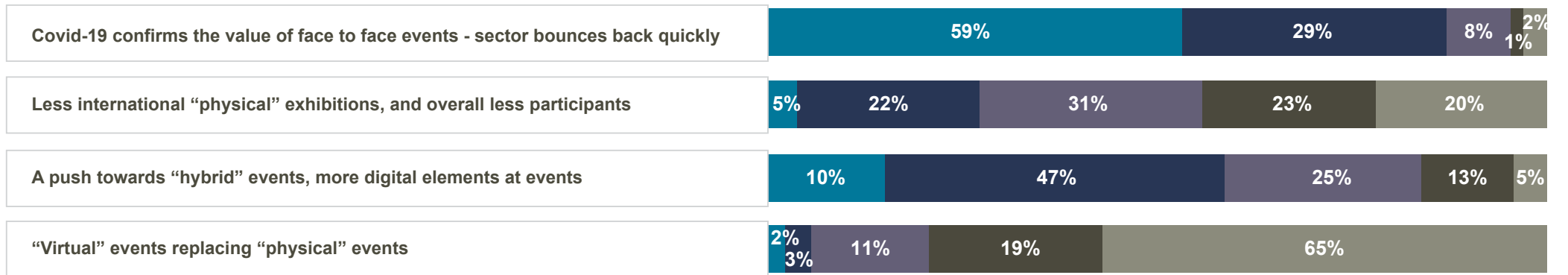
The global results indicate that:

- 88% of respondents (compared to 80% a year ago and 64% two years ago) agree that “COVID-19 confirms the value of face-to-face events” and anticipate the sector to bounce back quickly (with 59% stating “Yes, for sure” and 29% stating “Most probably”).
- 26% (compared to 44% and 63% previously) believe there will be “Less international ‘physical’ exhibitions and, overall, less participants” (with 5% stating “Yes, for sure”, 22% stating “Most probably” and 31% remaining unsure).
- 57% (compared to 73% and 80% previously) believe there is “A push towards hybrid events, more digital elements at events” (with 10% stating “Yes, for sure”, 47% stating “Most probably” and 25% remaining unsure).
- 5% (compared to 11% and 14% previously) agree that “Virtual events are replacing physical events”, while 11% are unsure and 84% state “Not sure at all” or “Definitely not”.



Format of exhibitions in the coming years

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



Part 2: Detailed results for 5 regions and 21 markets

North America:

Mexico
US

Central & South America:

Argentina
Brazil
Chile
Colombia

Europe:

France
Germany
Greece
Italy
Spain
Turkey
United Kingdom

Middle East & Africa:

Saudi Arabia
UAE
South Africa

Asia-Pacific:

Australia
China
India
Malaysia
Thailand

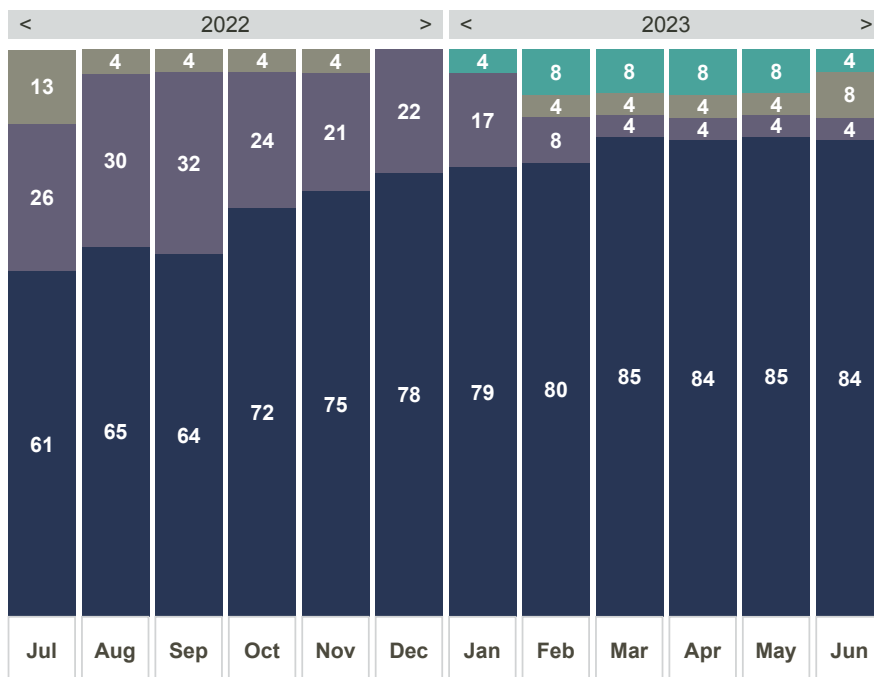
North America



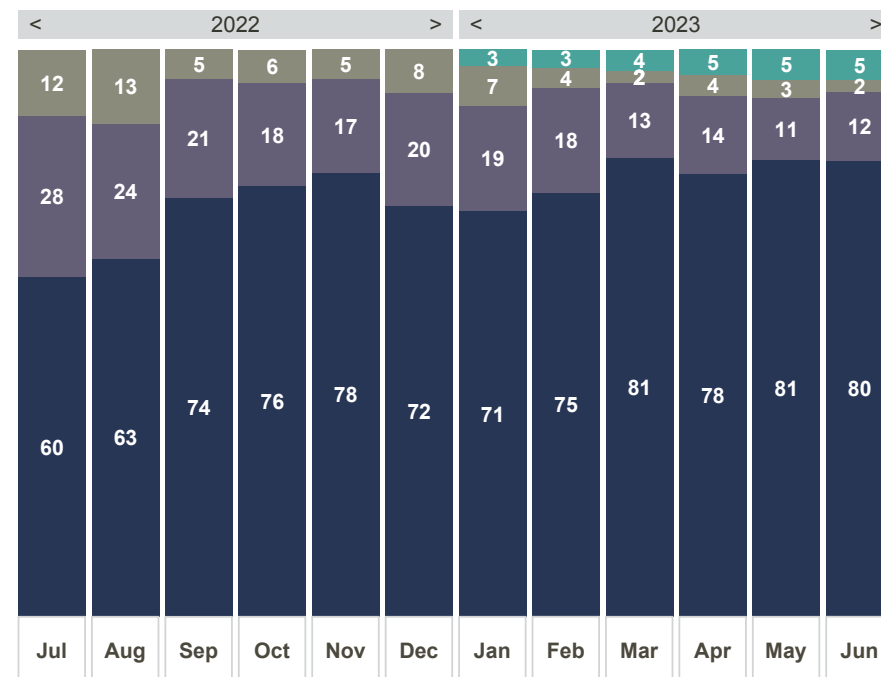
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023

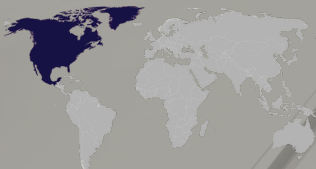


North America



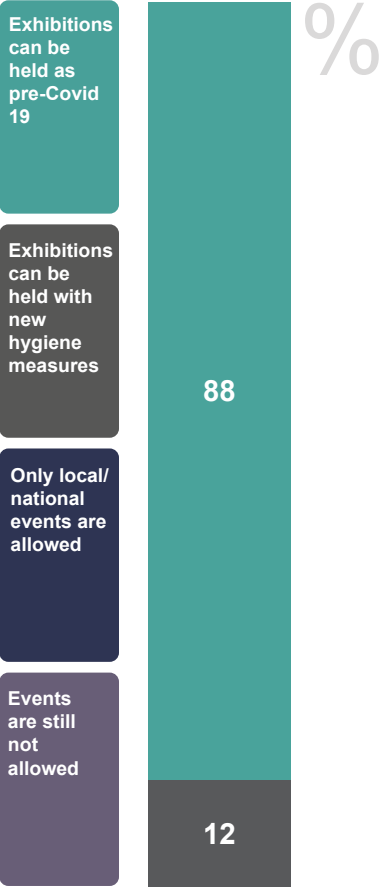
World



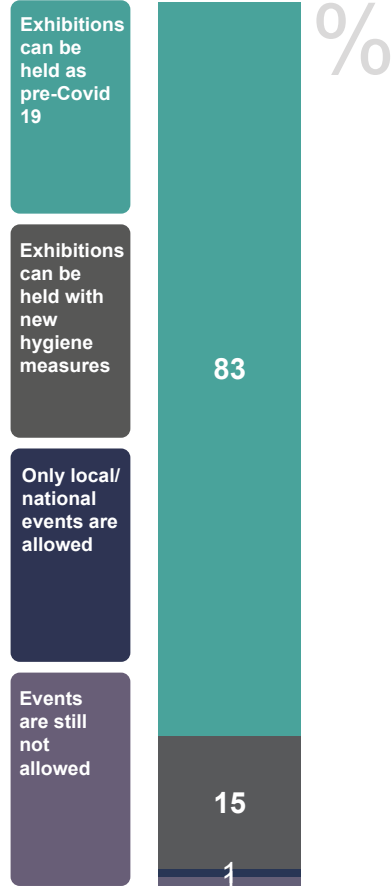


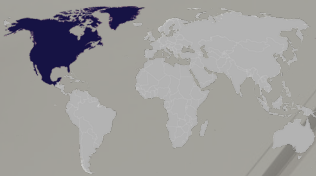
What is the overall status of operations in your city?

North America



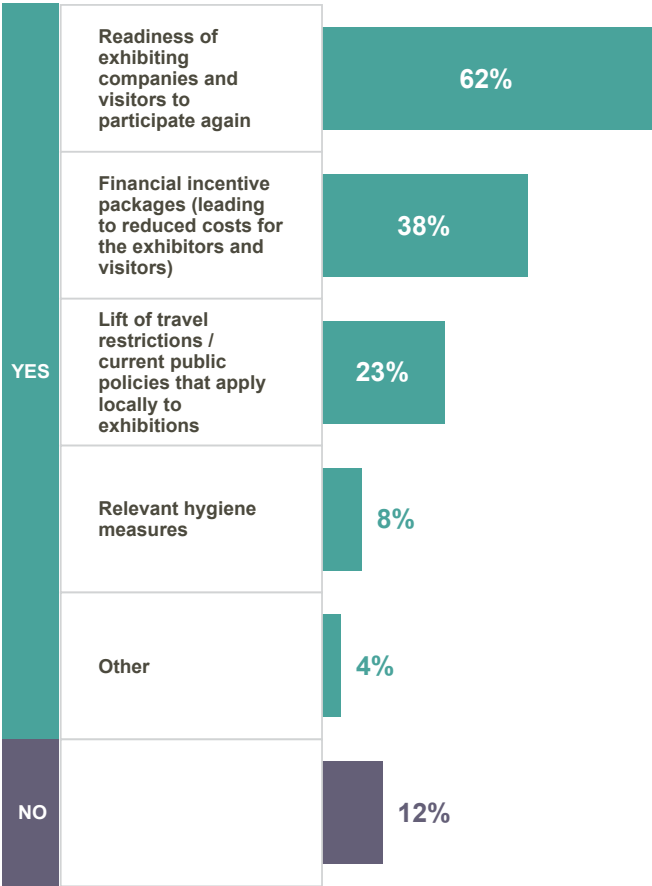
World



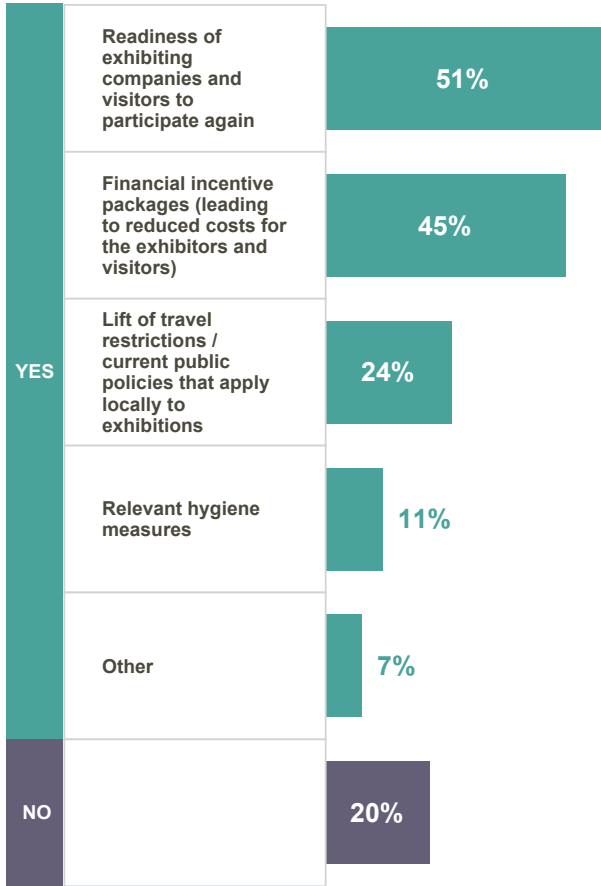


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

North America

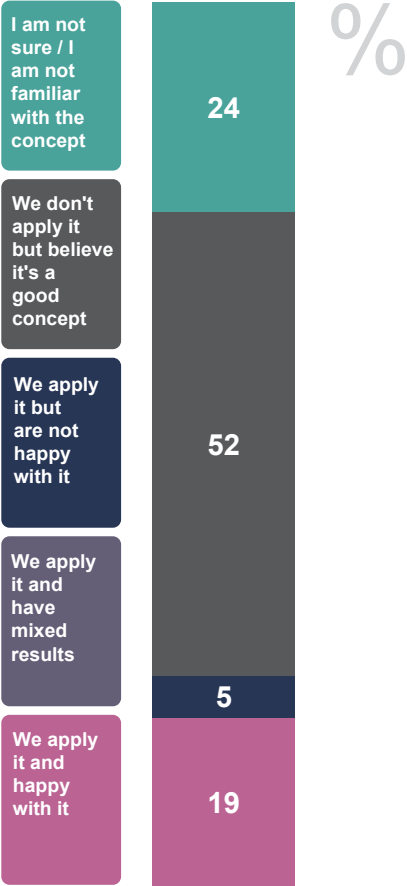


World



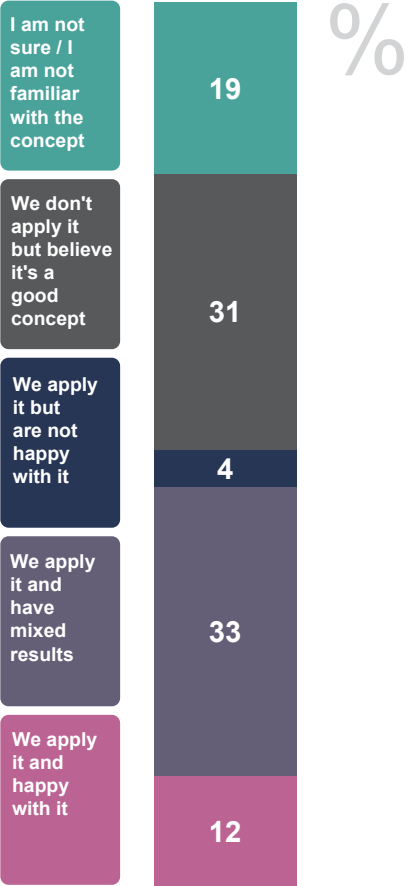
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

North America

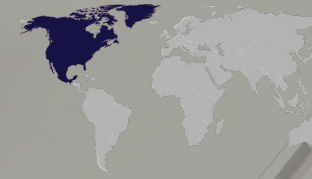


For organisers only (21 answers in total)

World

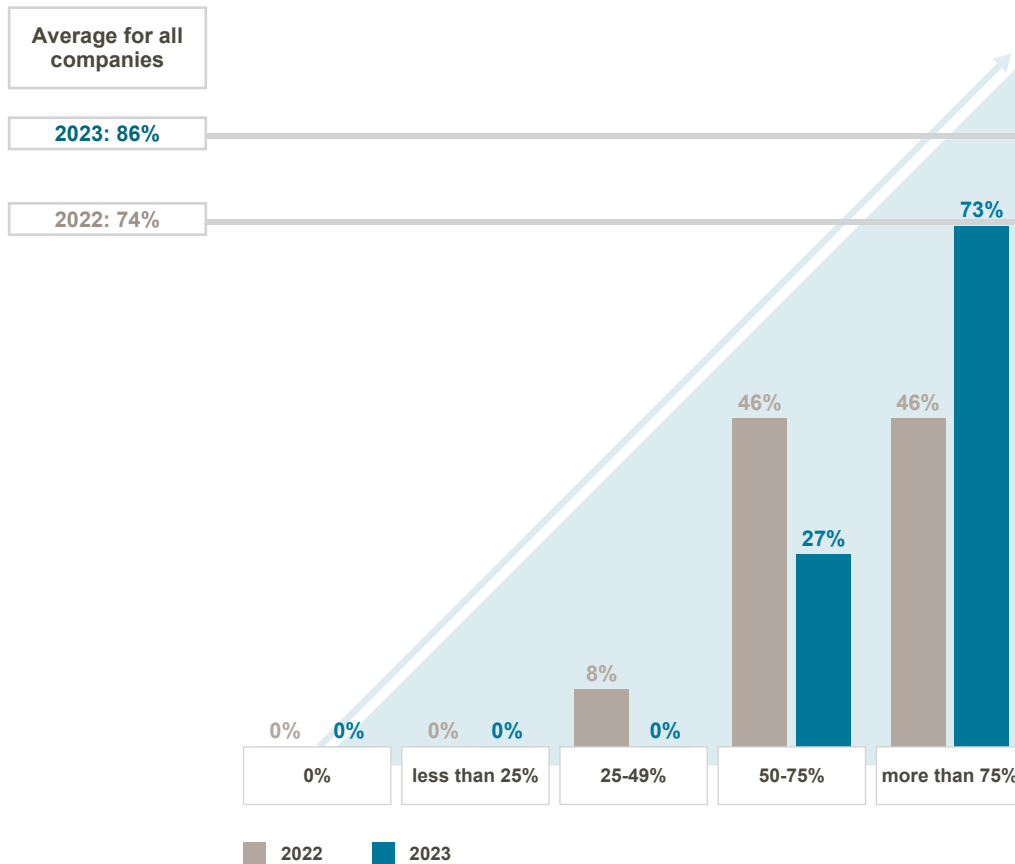


For organisers only (257 answers in total)

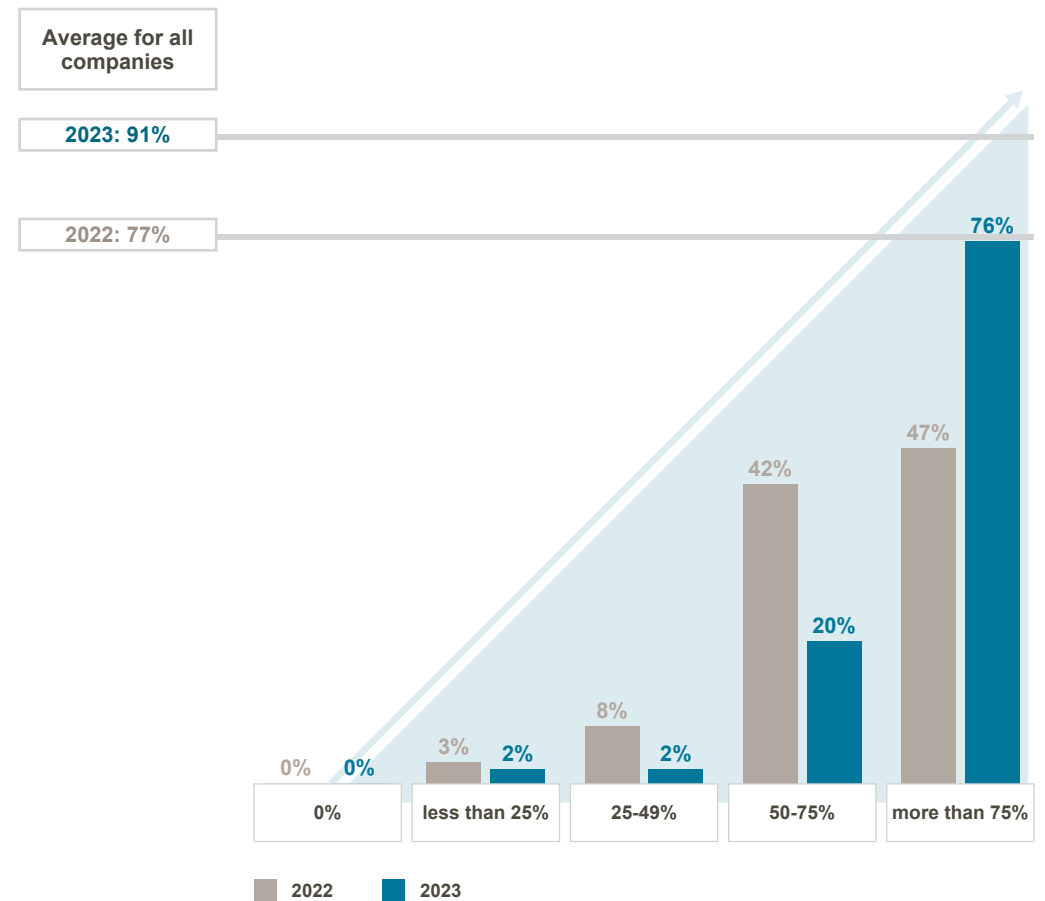


Revenue compared to 2019

North America



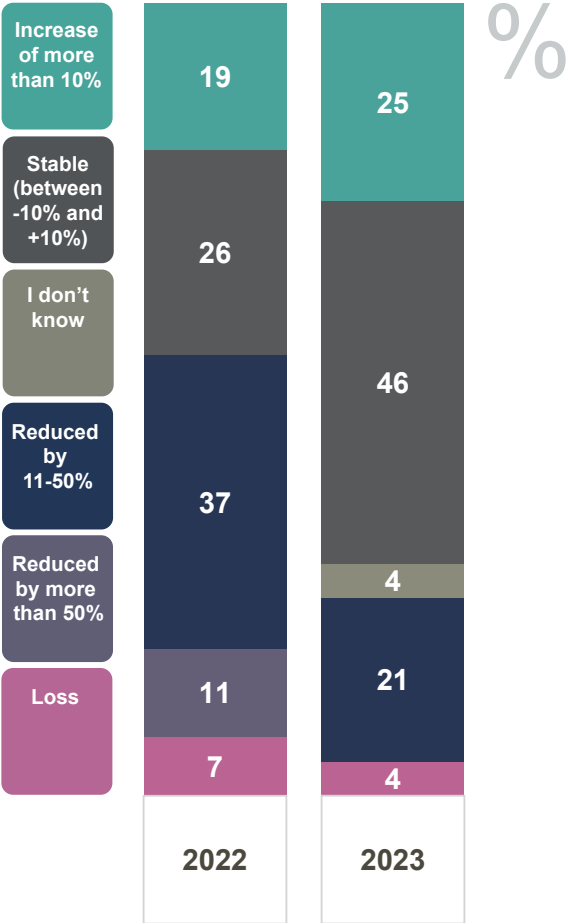
World



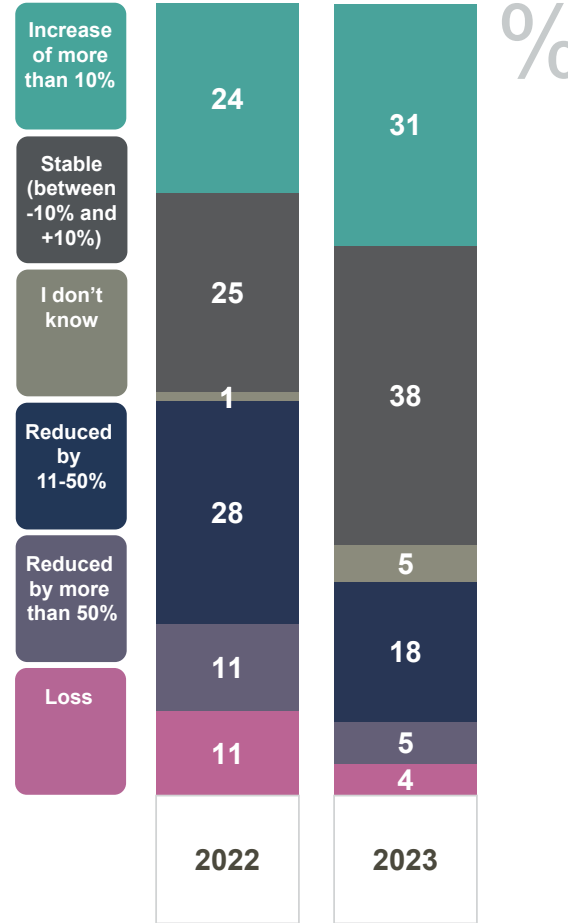
Operating Profits 2022 North America

Operating Profits compared to 2019

North America



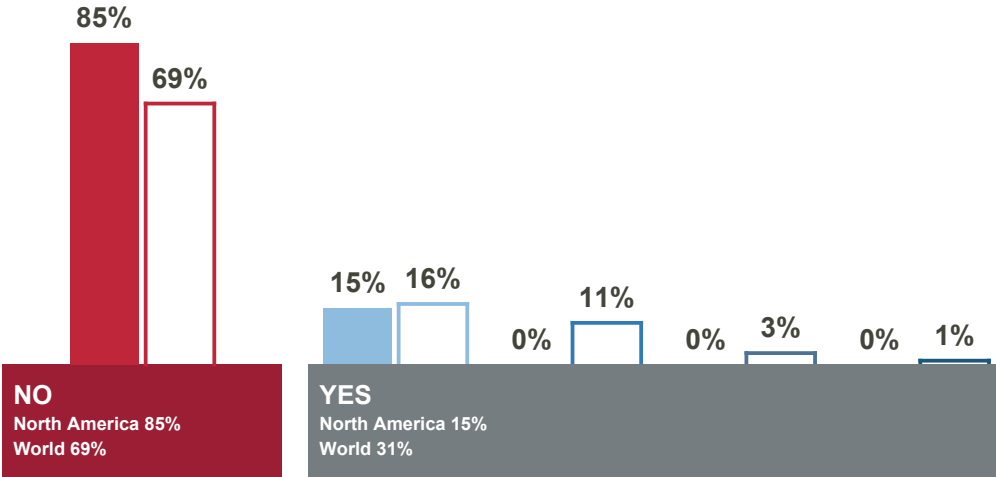
World



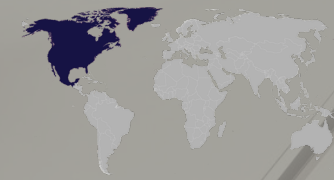
Did your company benefit from public financial support in 2022?

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

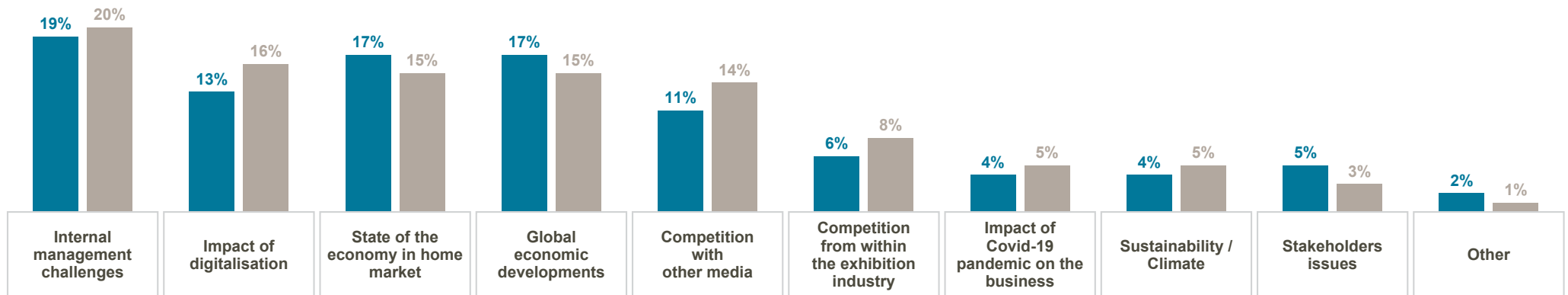


Most Important Business Issues - Format of Exhibitions - North America



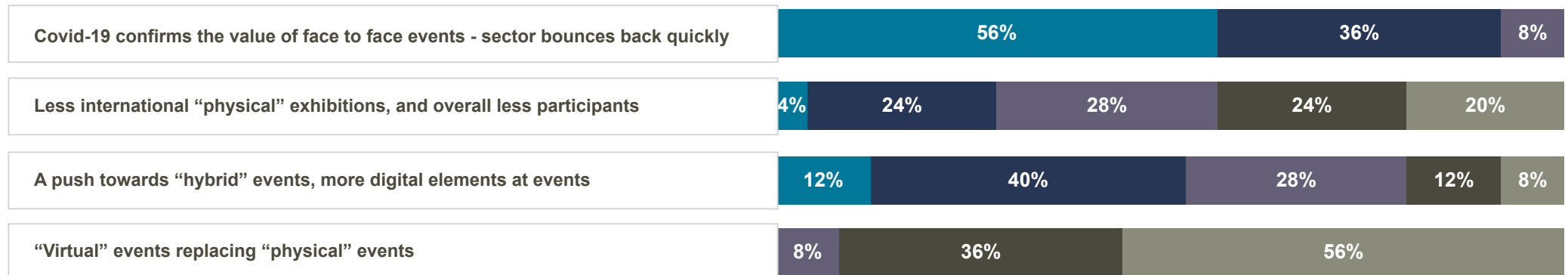
Most important business issues in the exhibition industry

North America Global



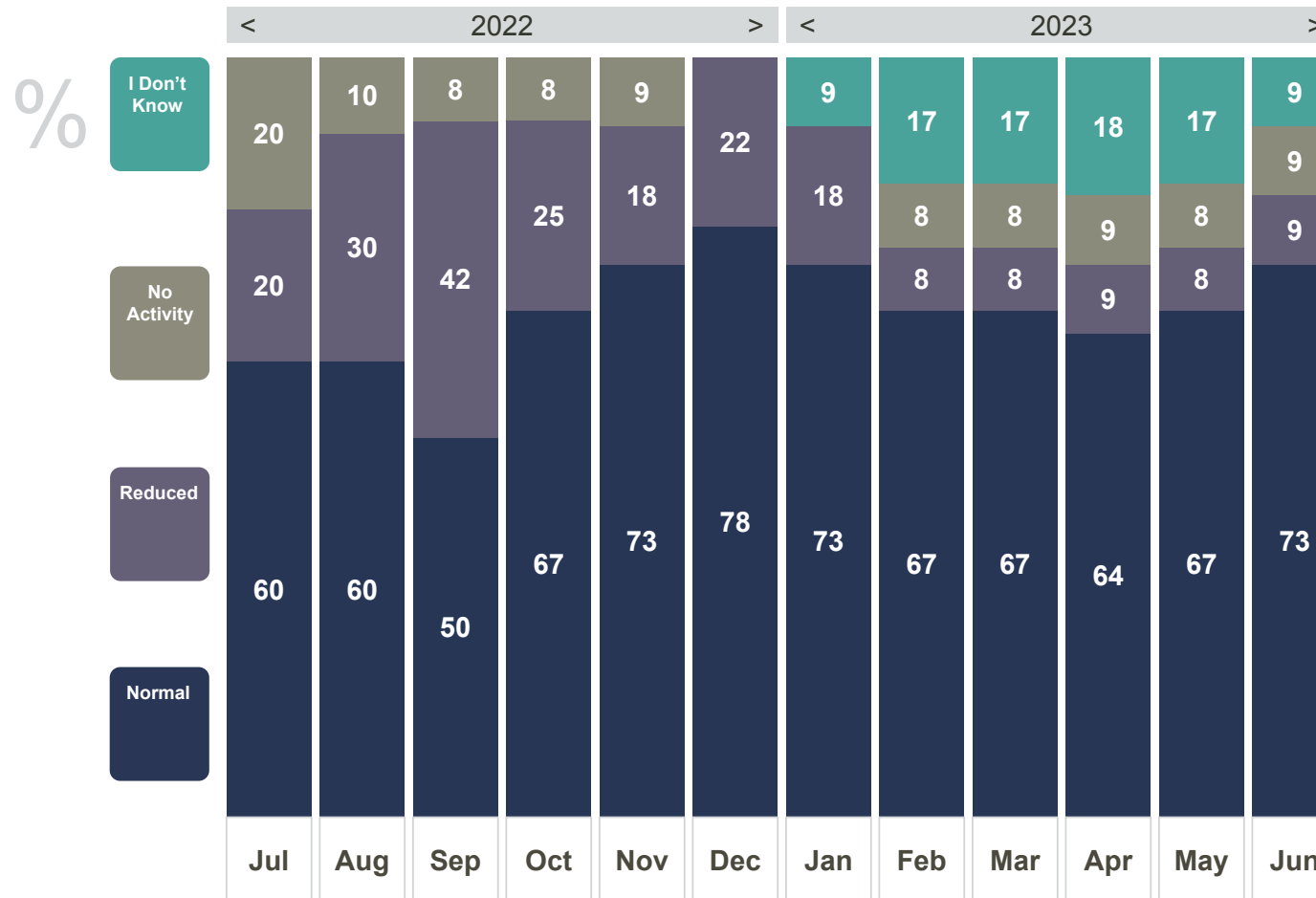
Format of exhibitions in the coming years

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





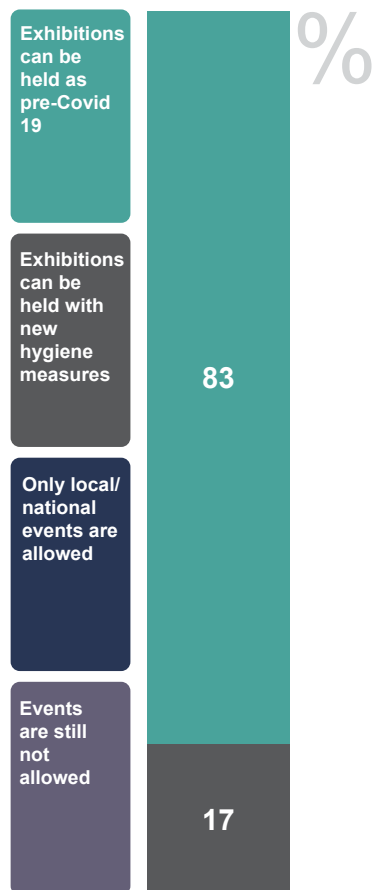
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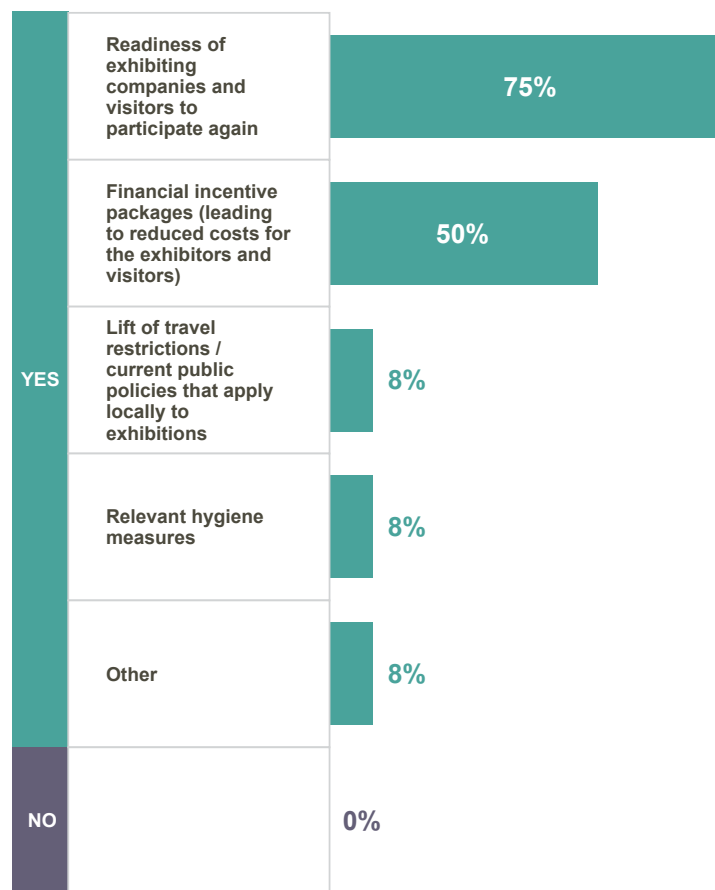
Detailed results for Mexico



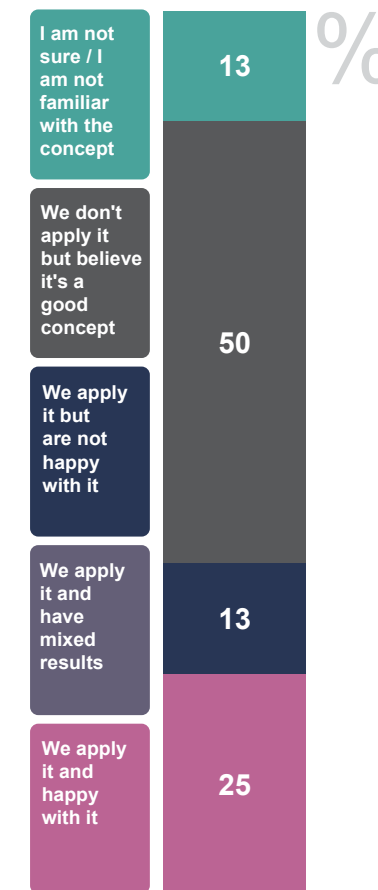
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



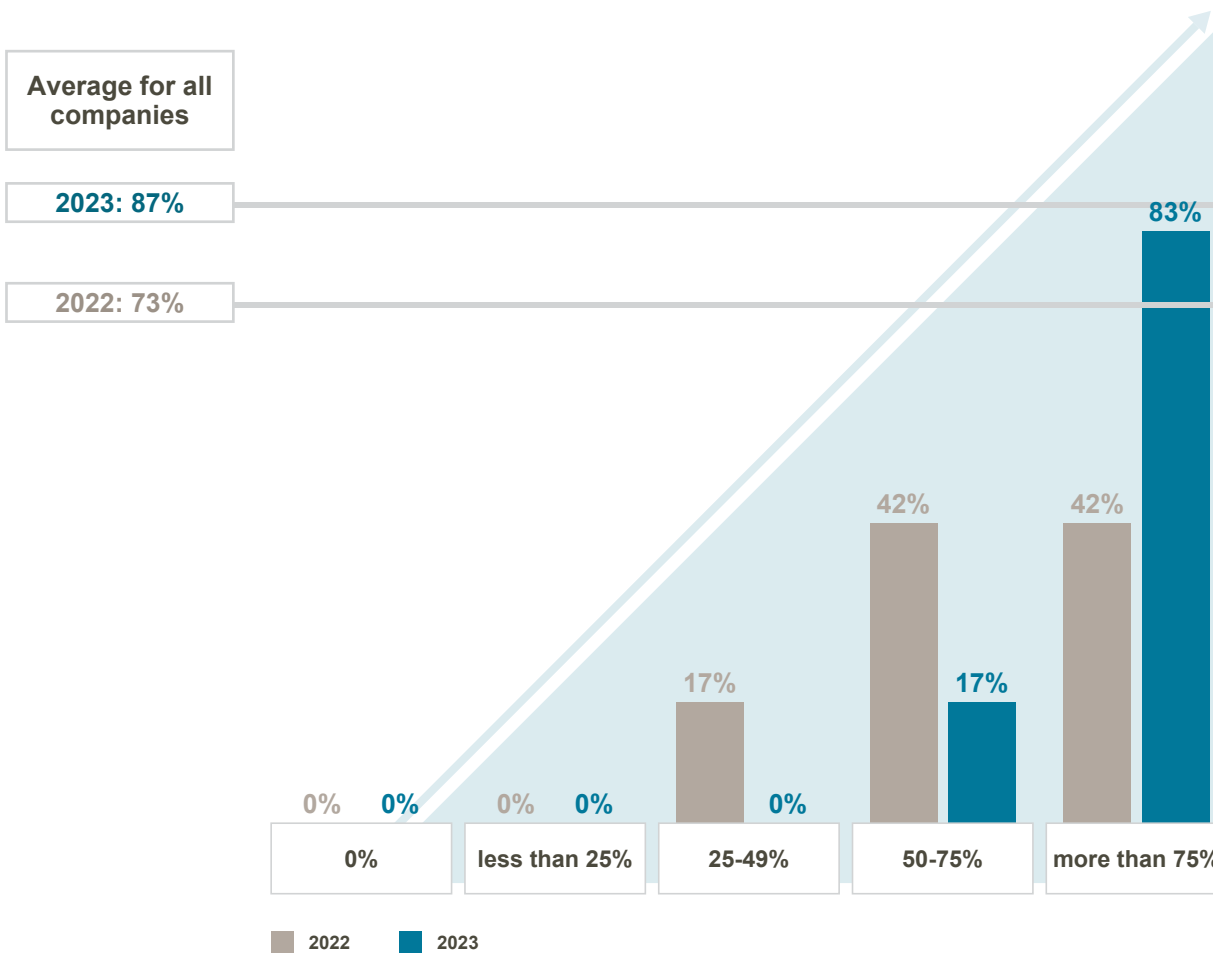
How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



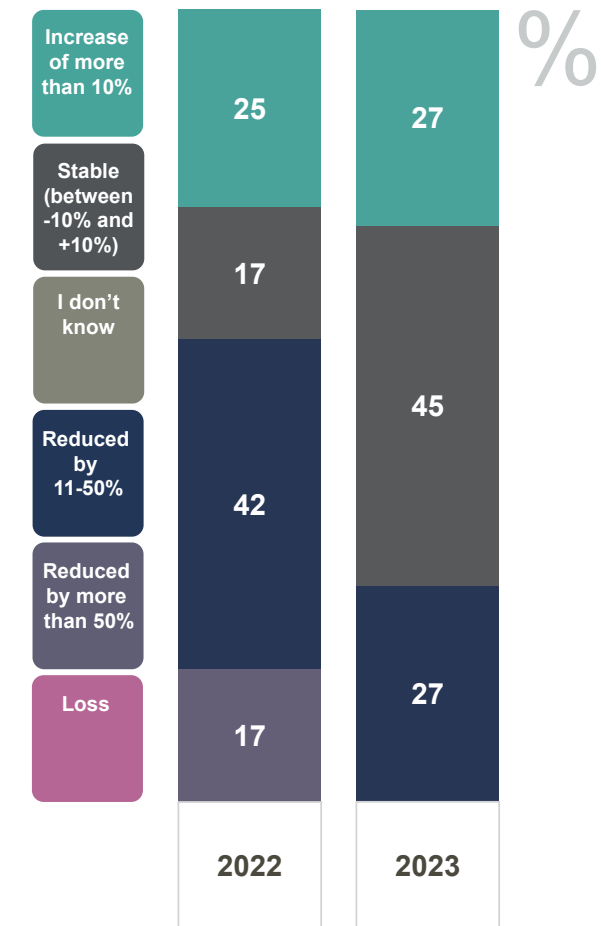
For organisers only (8 answers in total)



Revenue compared to 2019



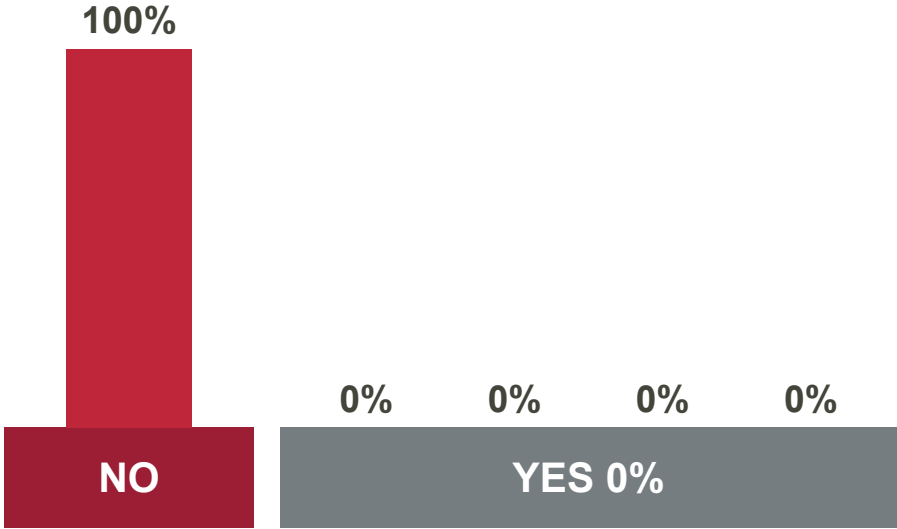
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

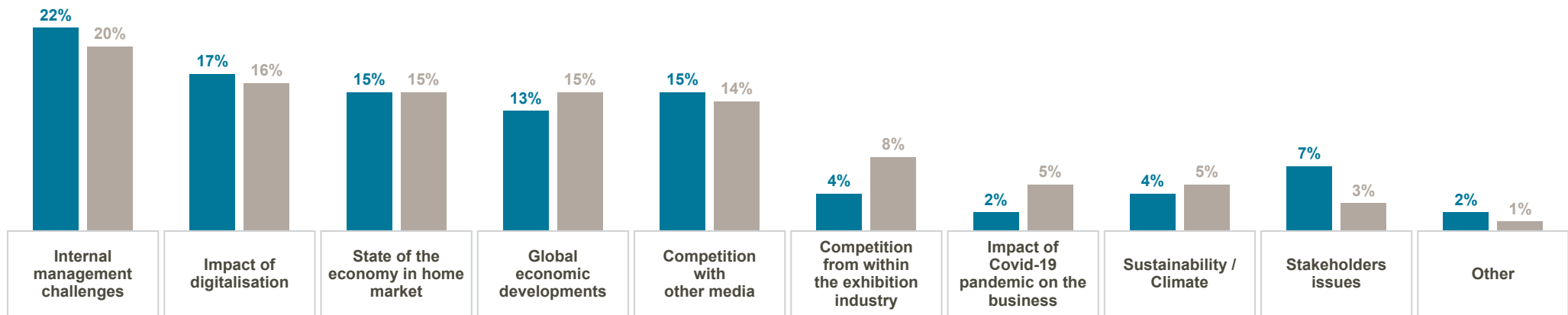


Detailed results for Mexico



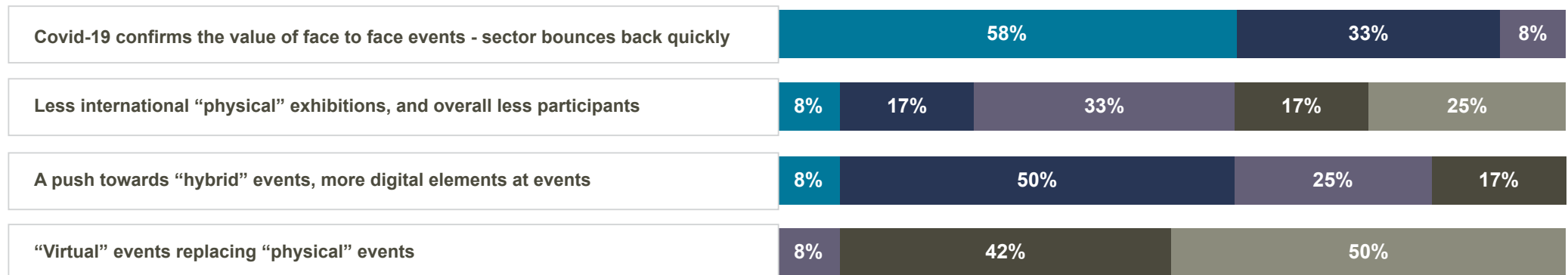
Most important business issues in the exhibition industry

Mexico Global



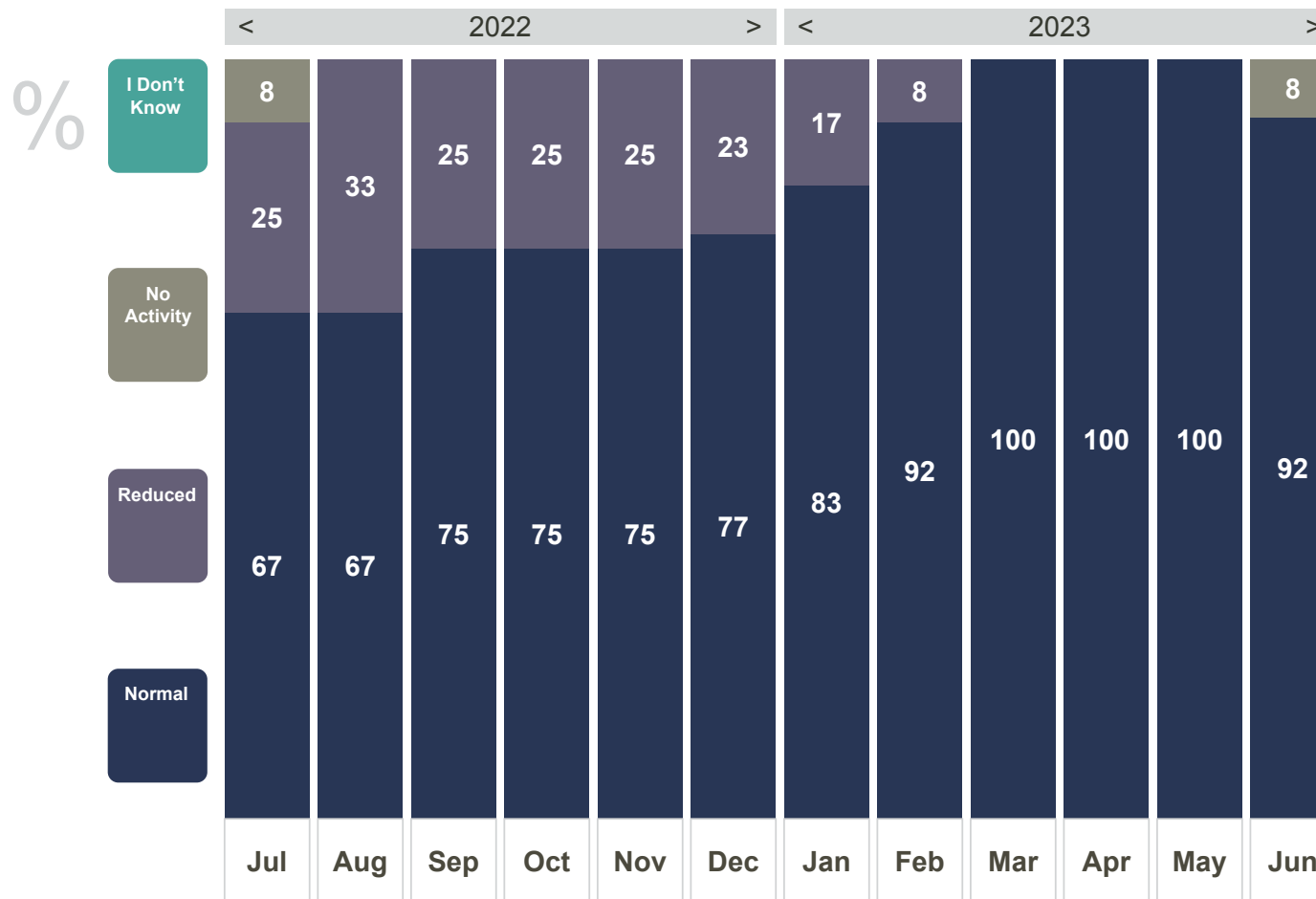
Format of exhibitions in the coming years

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





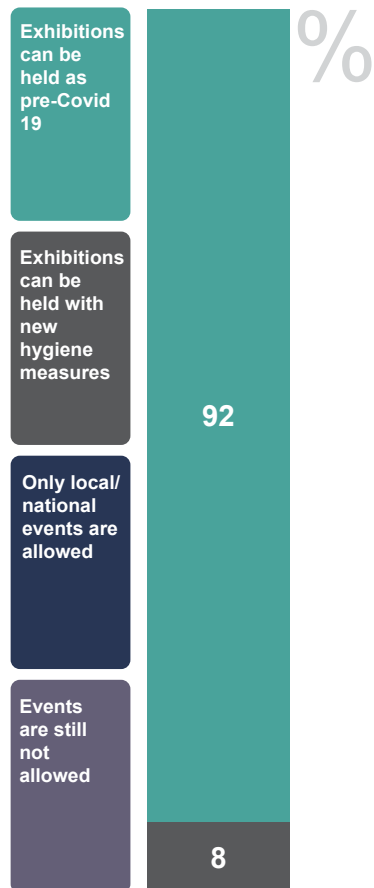
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



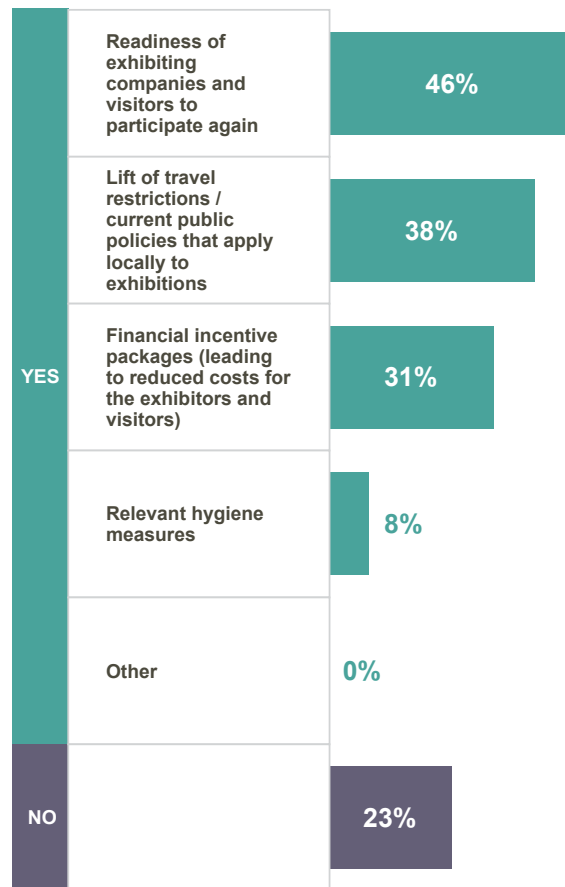
Detailed results for US



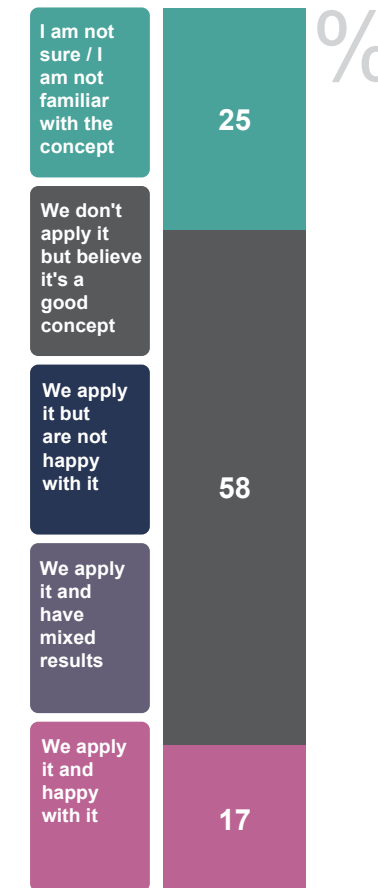
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



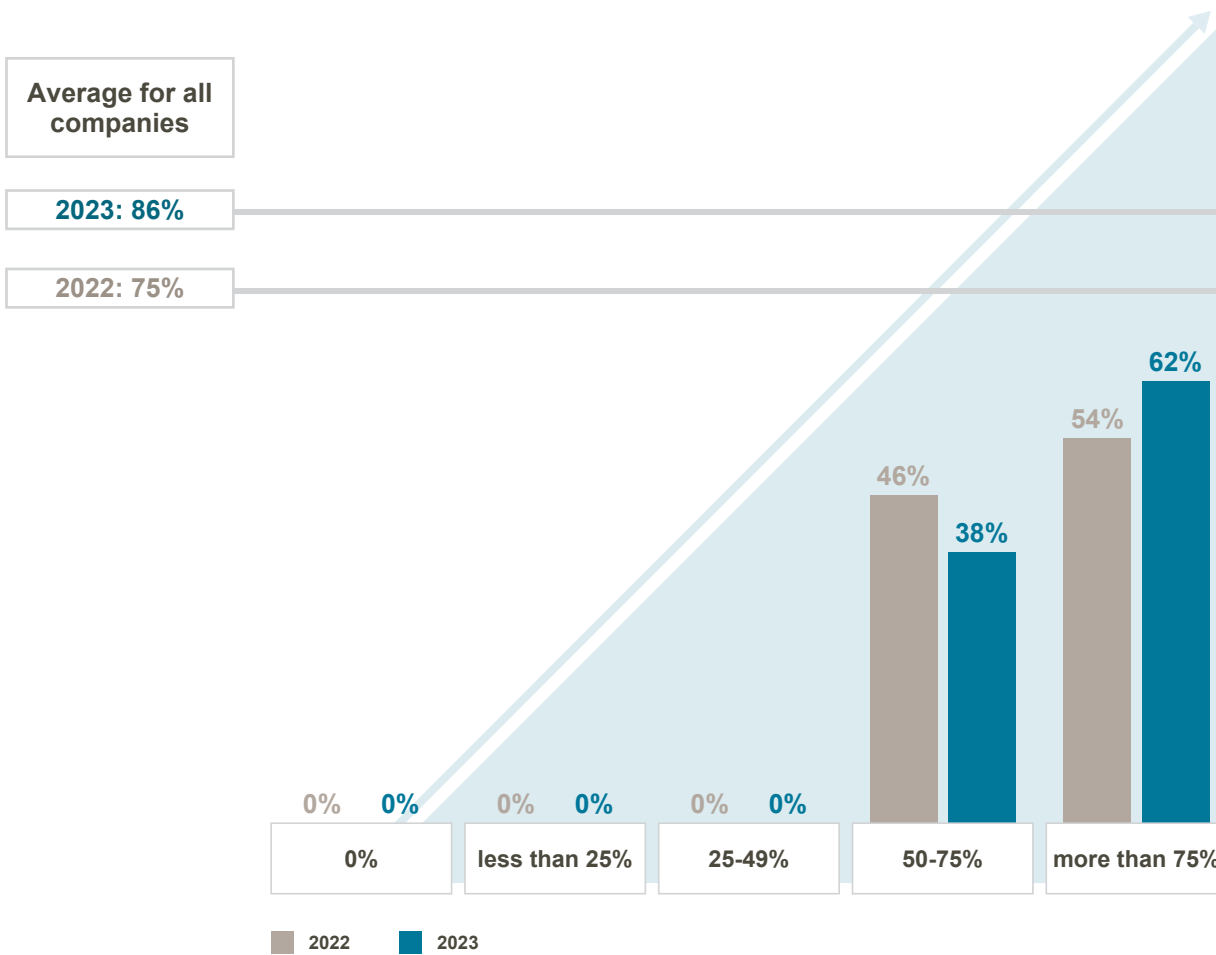
How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



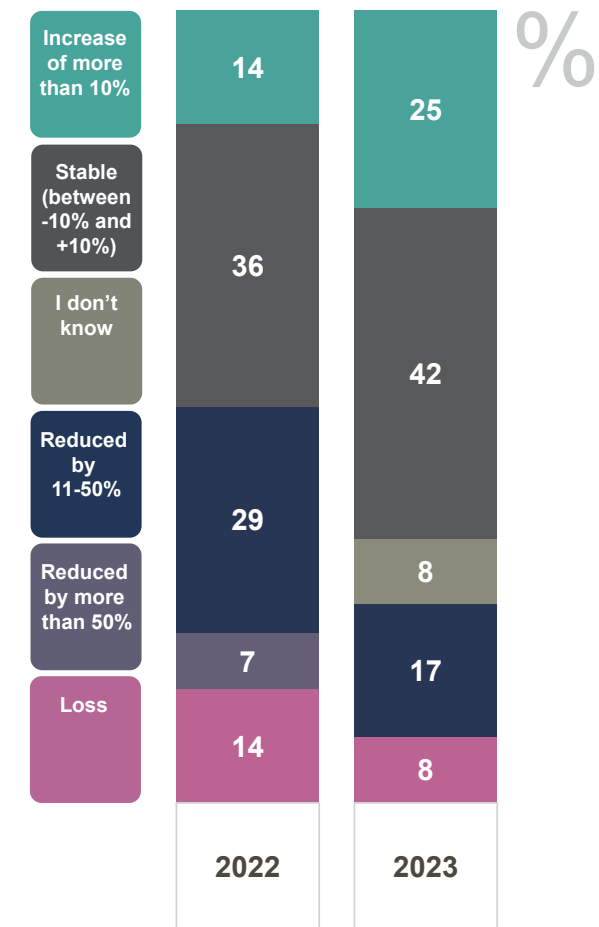
For organisers only (12 answers in total)



Revenue compared to 2019

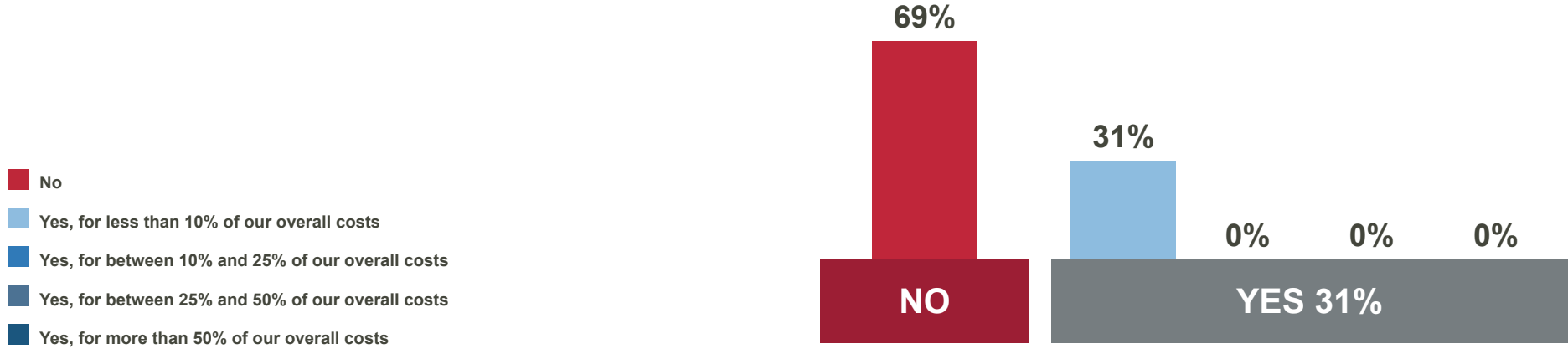


Operating Profits compared to 2019





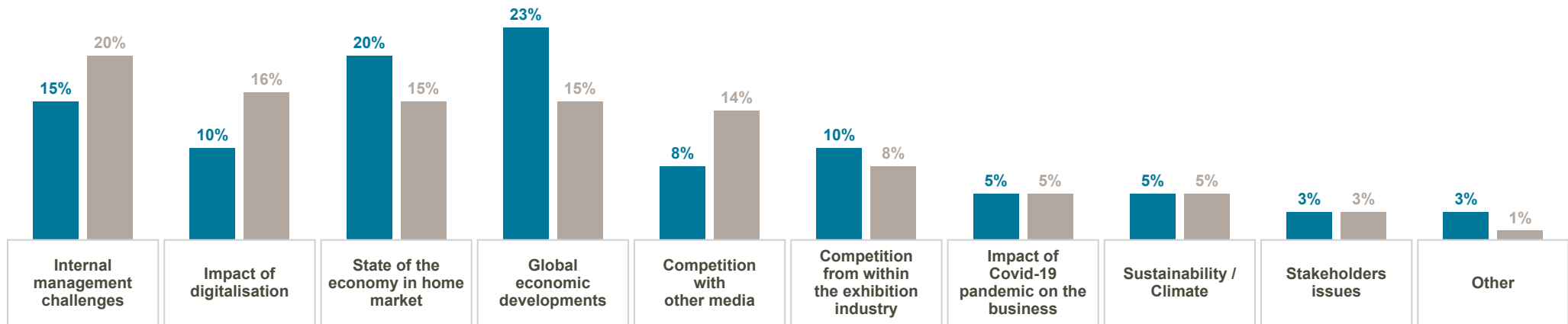
Did your company benefit from public financial support in 2022?





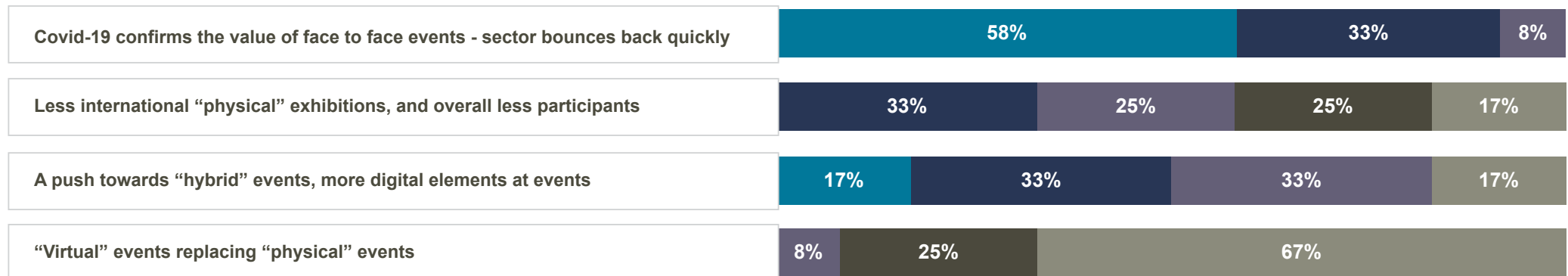
Most important business issues in the exhibition industry

USA
Global



Format of exhibitions in the coming years

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



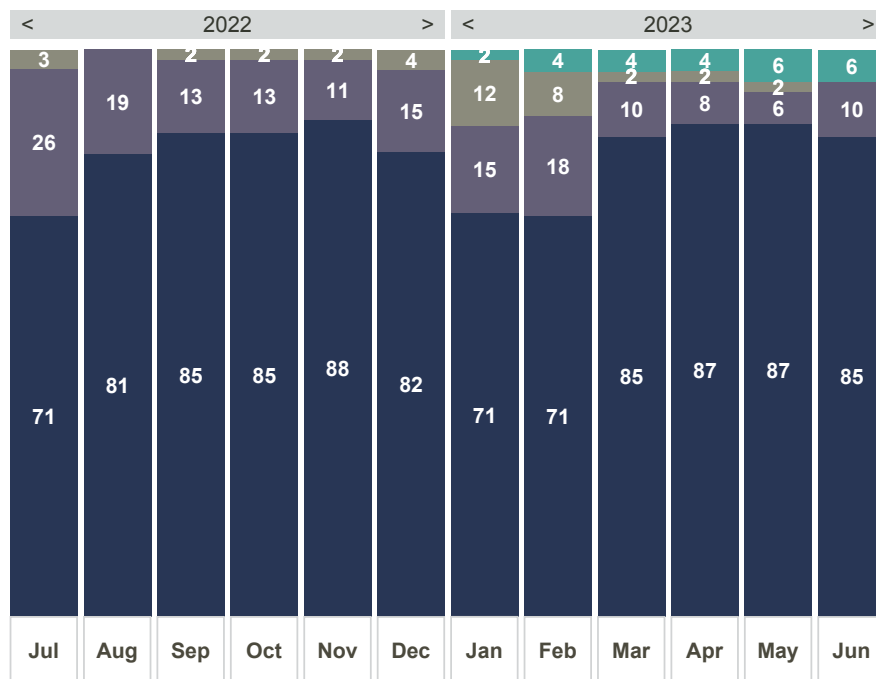
A network diagram consisting of several circular nodes connected by thin lines, set against a solid red background. The nodes are arranged in a roughly diagonal line from the top-left to the bottom-right, with some branching connections. The nodes have a metallic, reflective appearance with highlights and shadows.

Central & South America

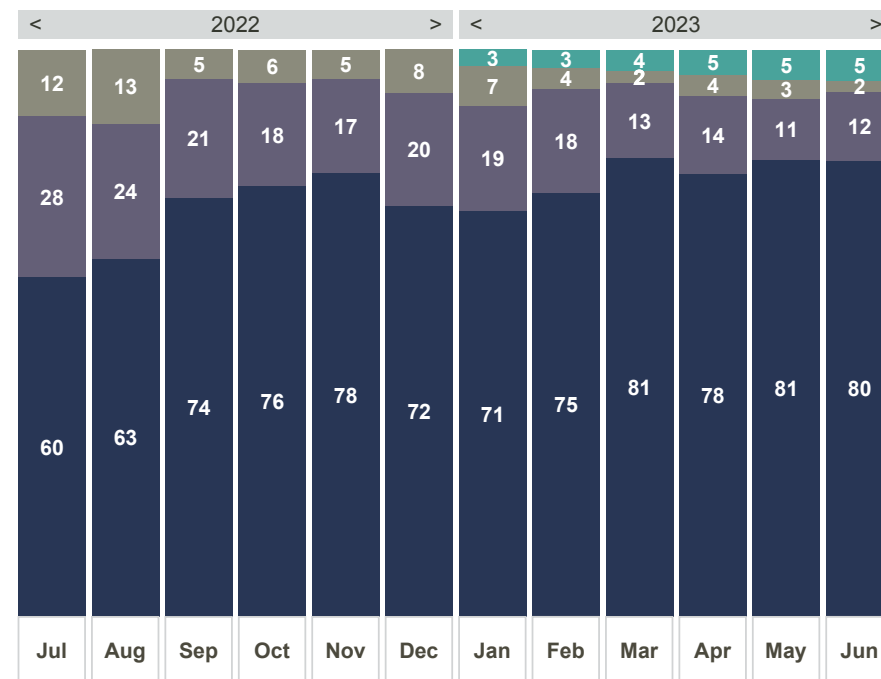
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



Central & South America



World



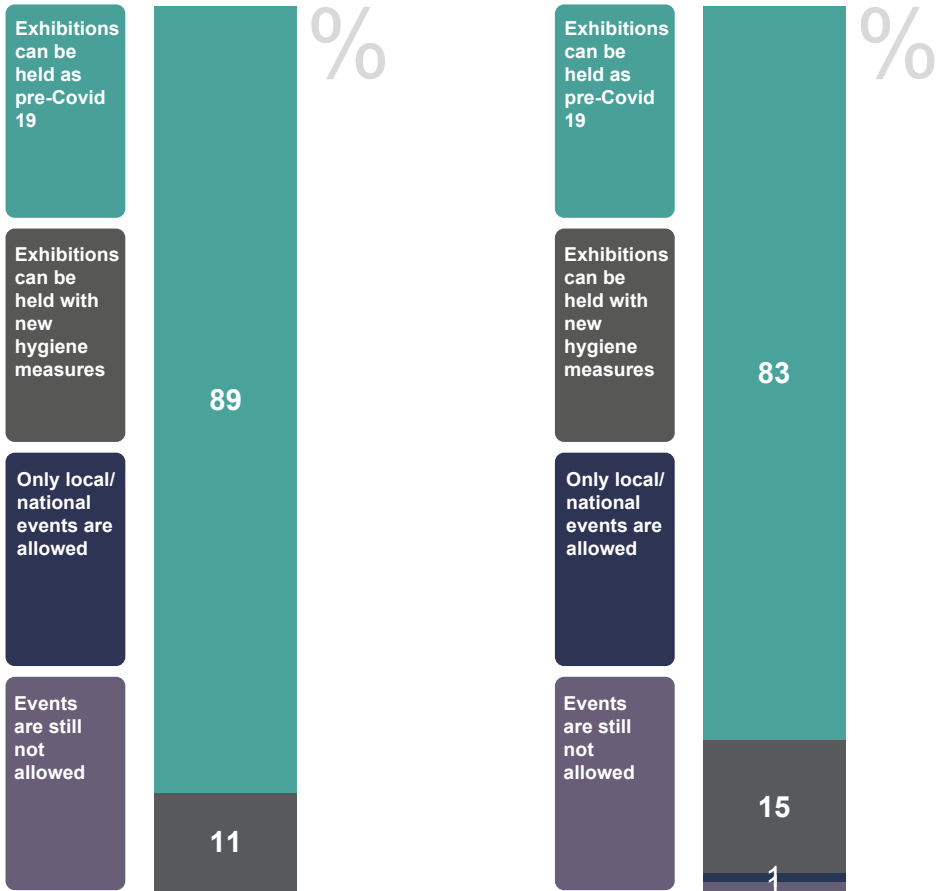
%



What is the overall status of operations in your city?

Central & South America

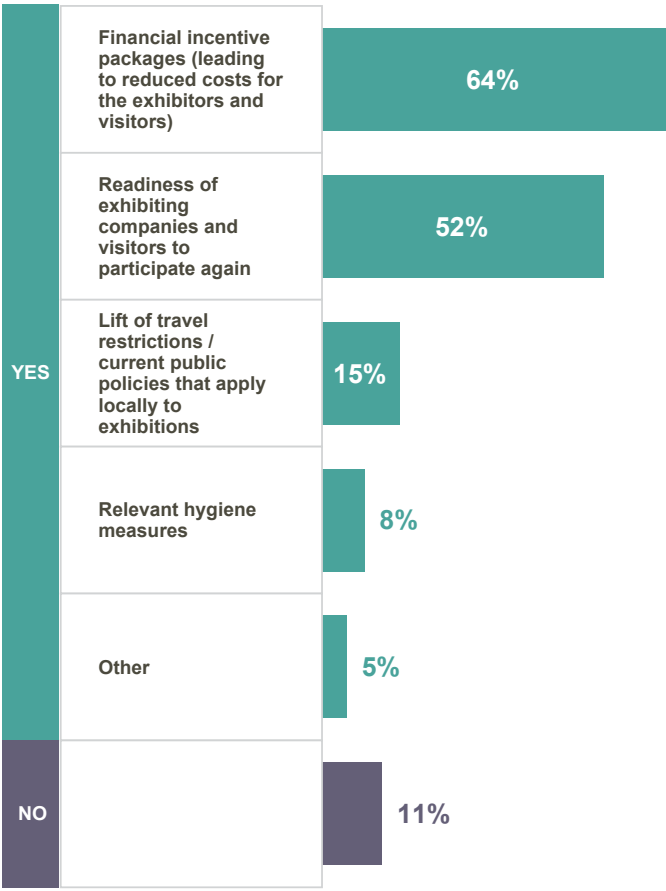
World



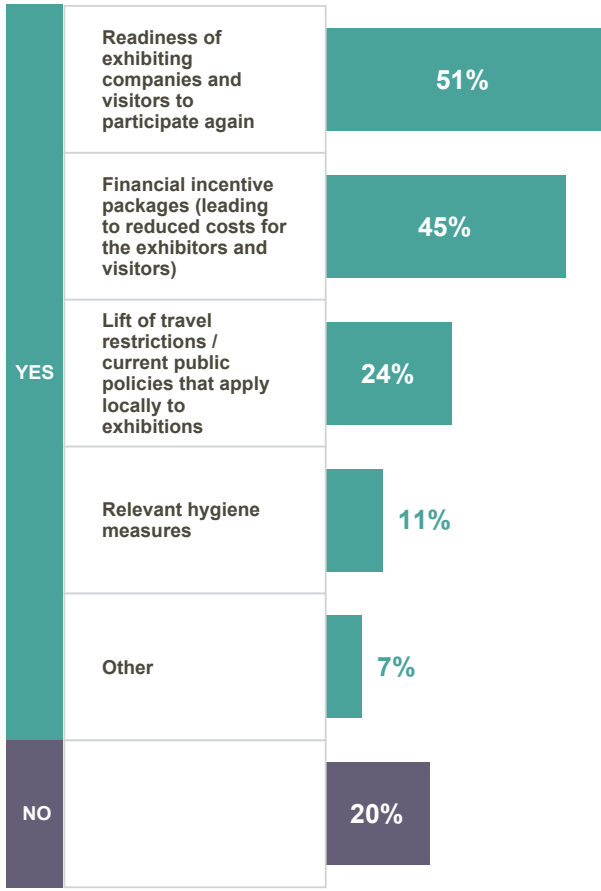


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

Central & South America

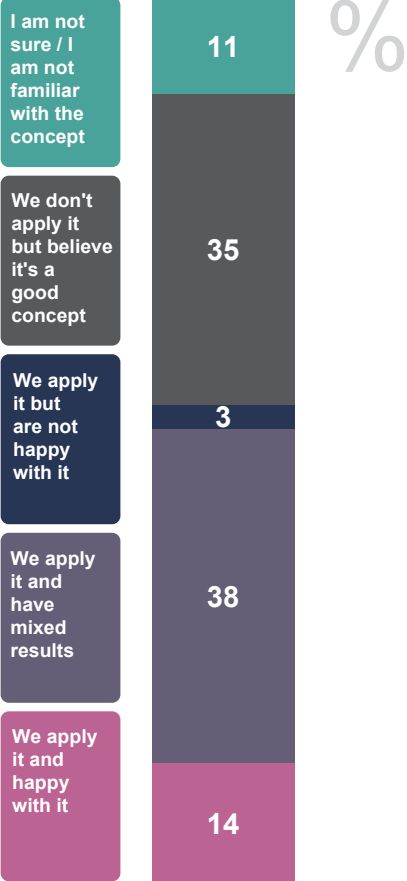


World



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

Central & South America



For organisers only (37 answers in total)

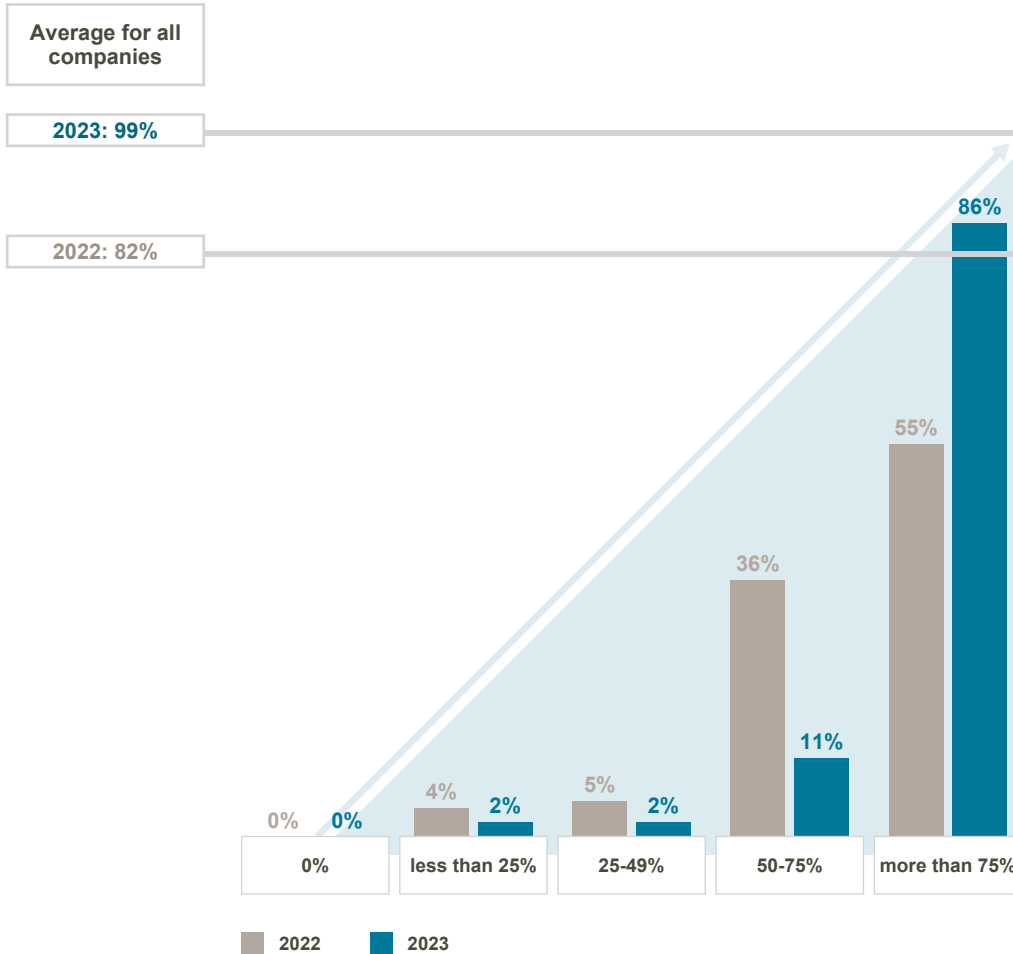
World



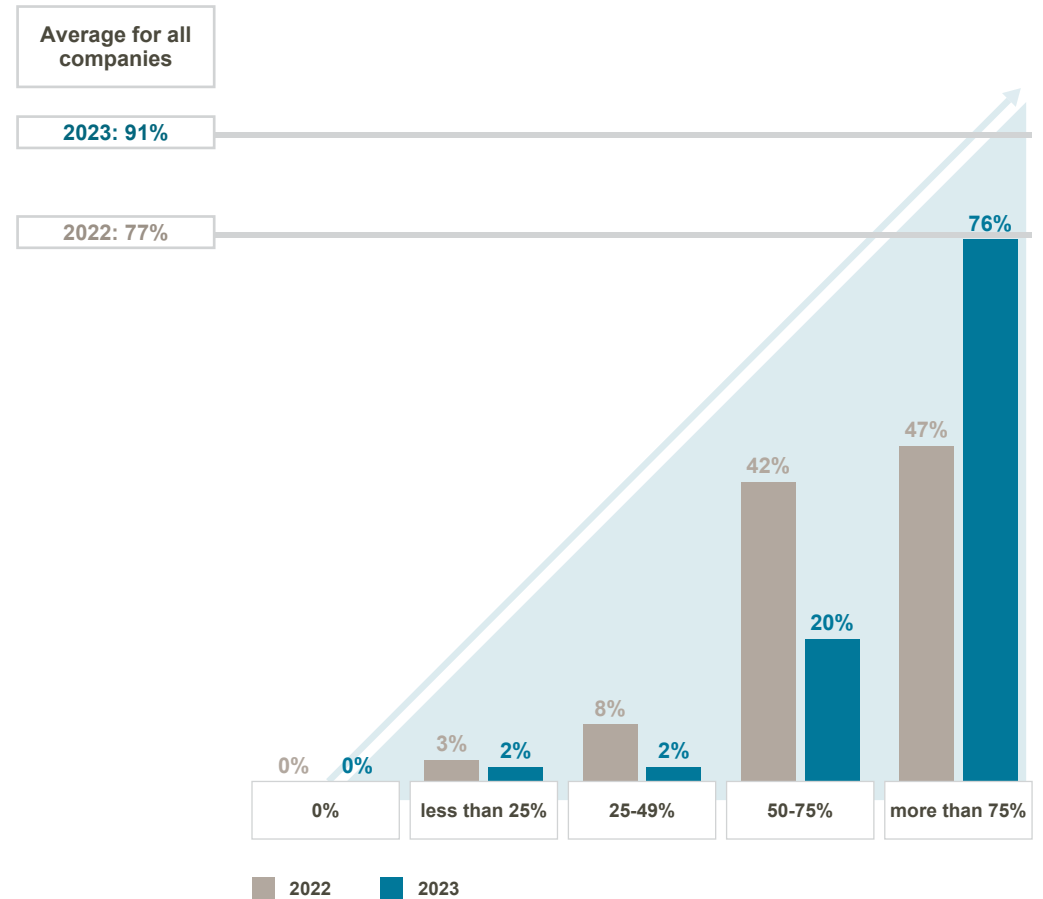
For organisers only (257 answers in total)

Revenue compared to 2019

Central & South America



World

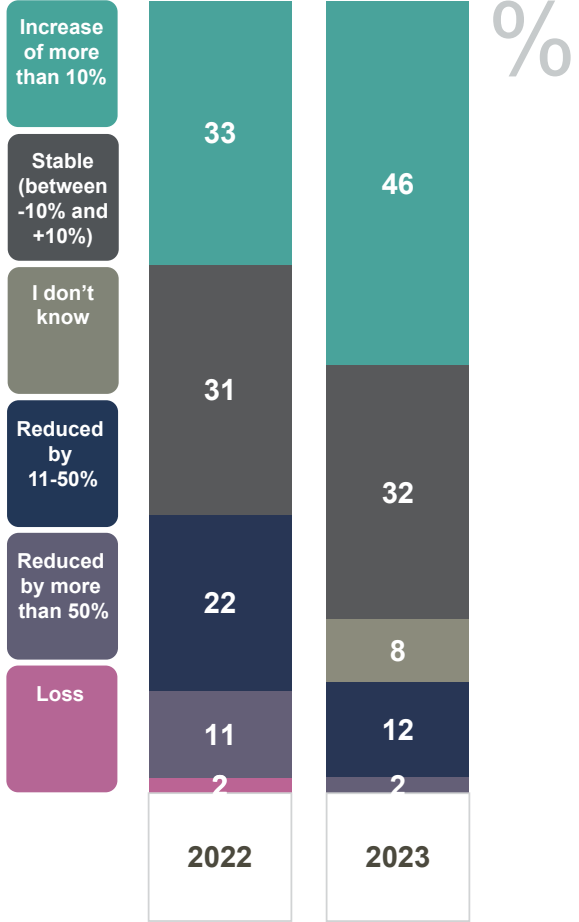


Operating Profits 2022 Central & South America

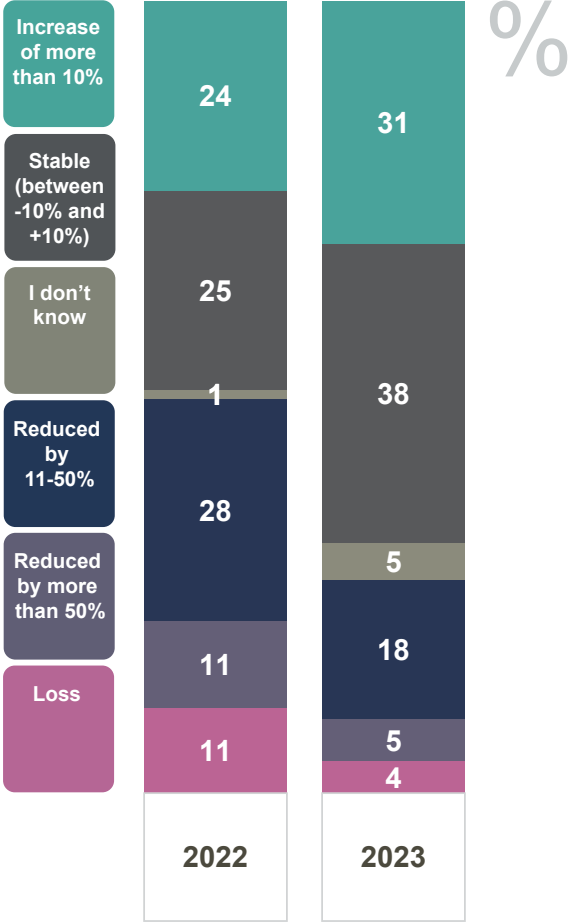


Operating Profits compared to 2019

Central & South America



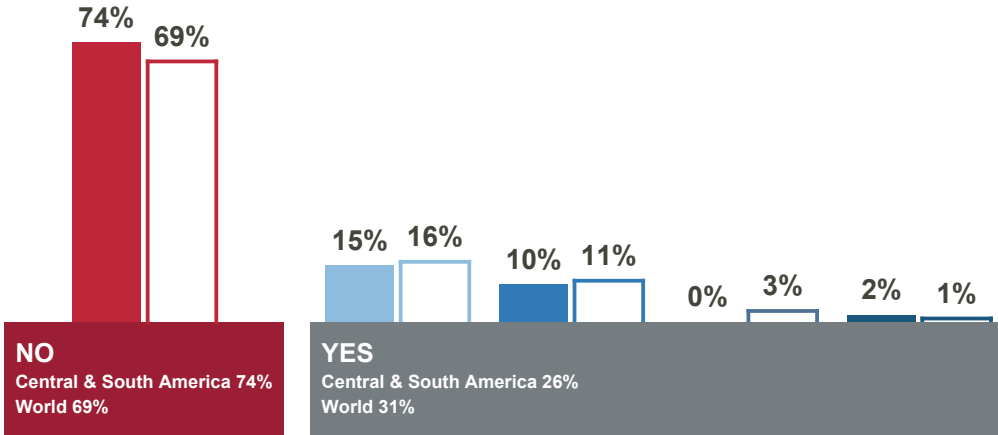
World



Did your company benefit from public financial support in 2022?

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

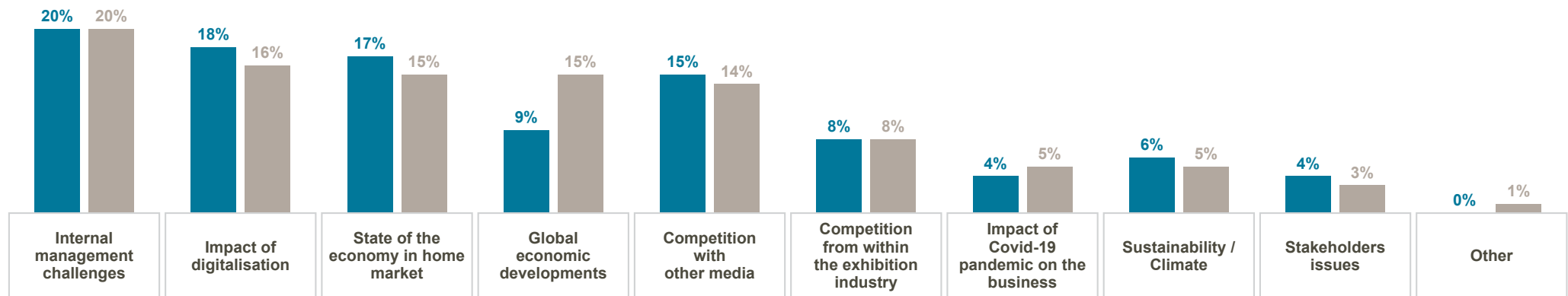


Most Important Business Issues - Format of Exhibitions - Central & South America

Most important business issues in the exhibition industry

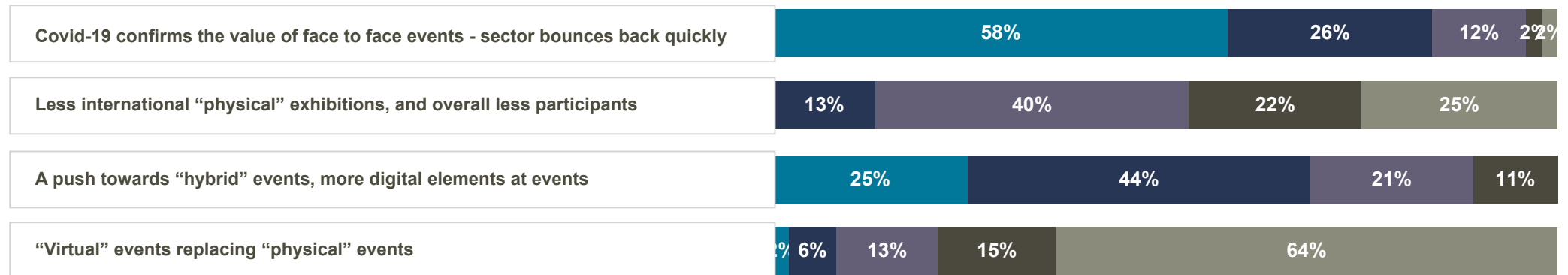
Central & South America

Global



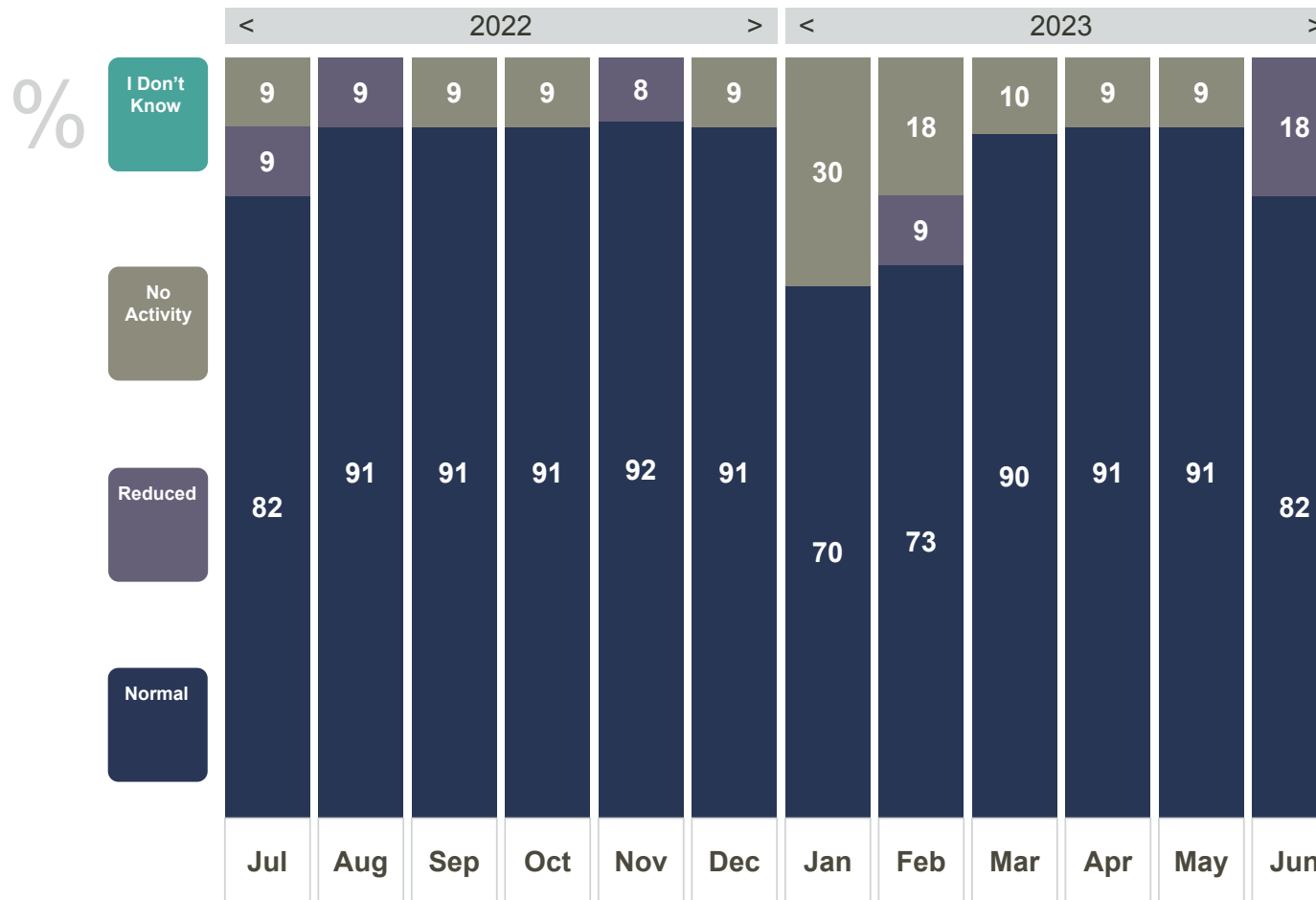
Format of exhibitions in the coming years

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





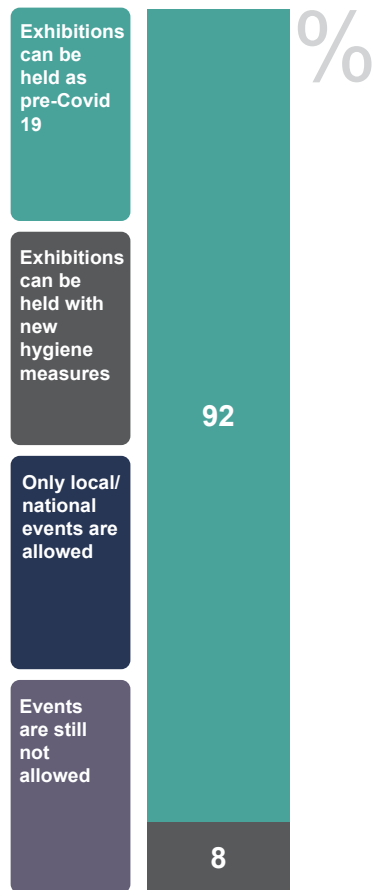
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



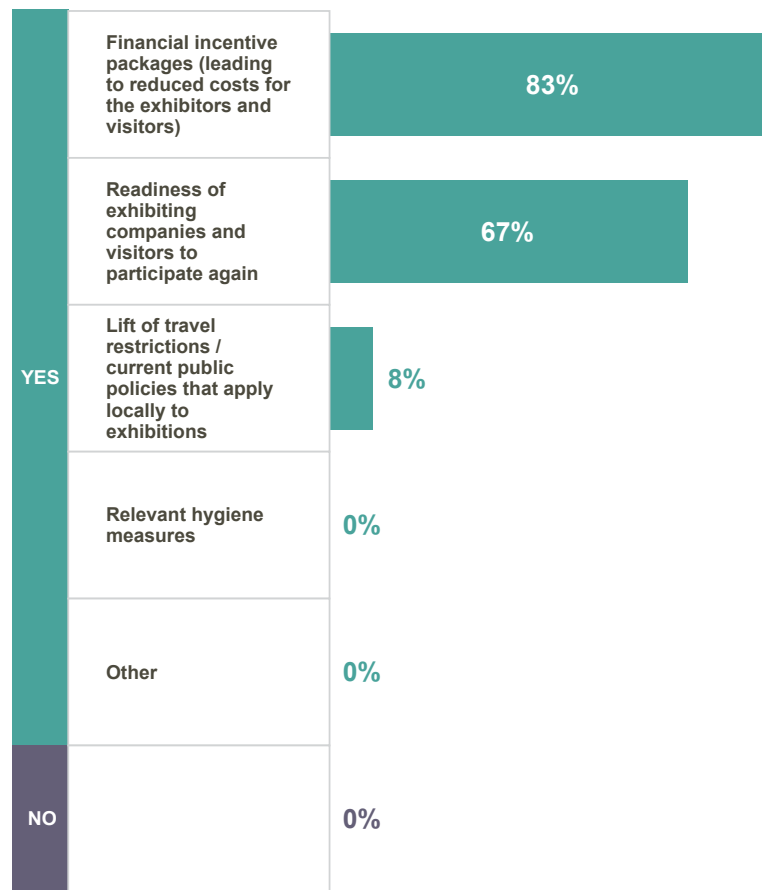
Detailed results for Argentina



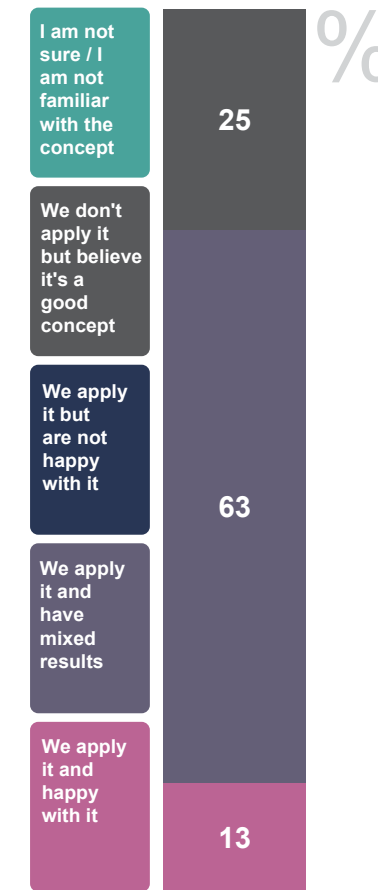
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

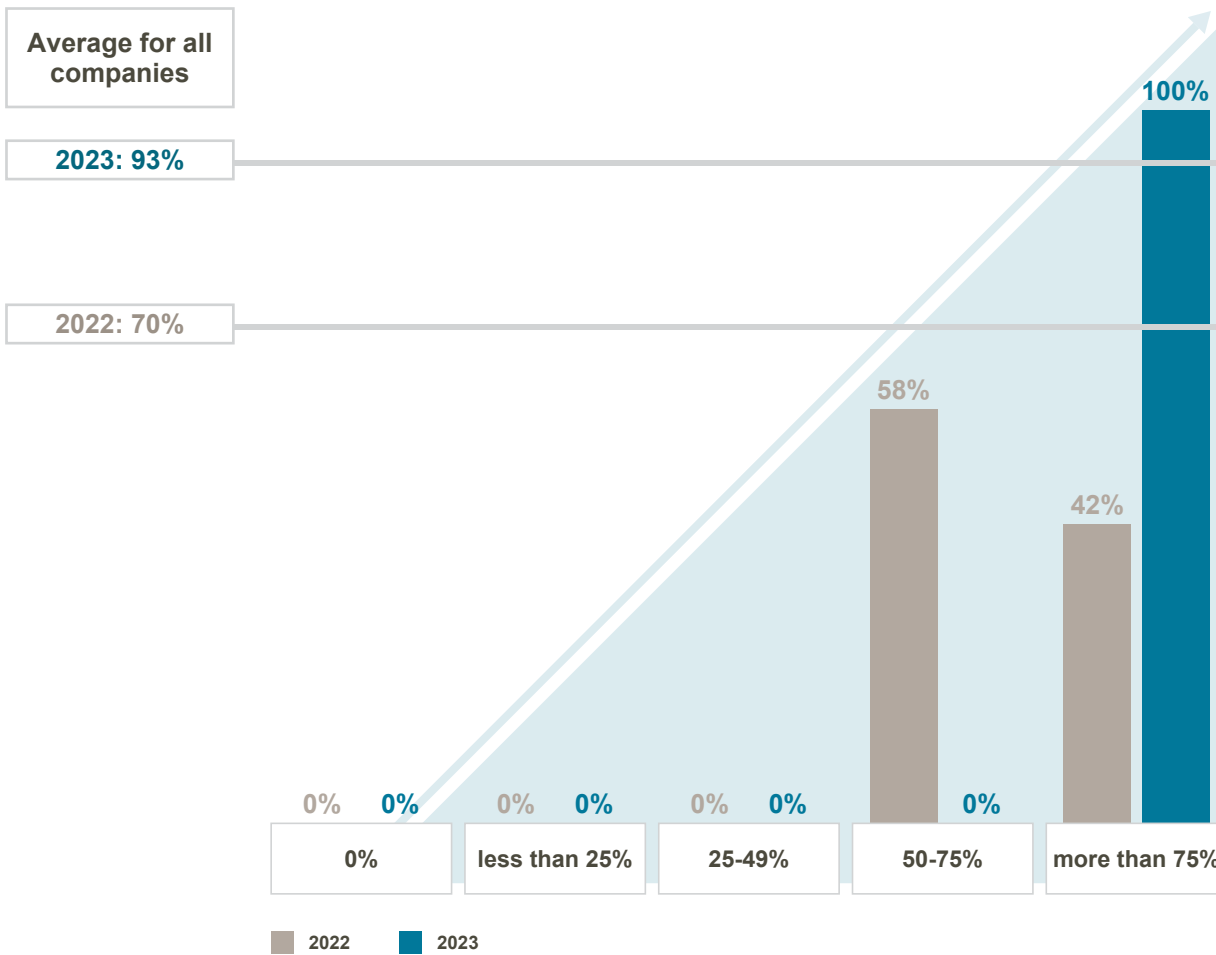


For organisers only (8 answers in total)

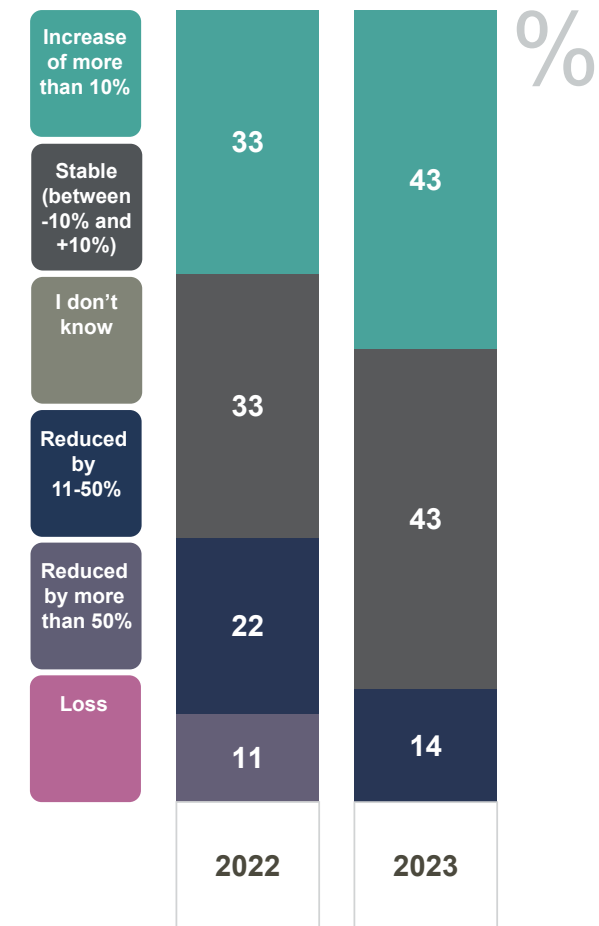
Detailed results for Argentina



Revenue compared to 2019

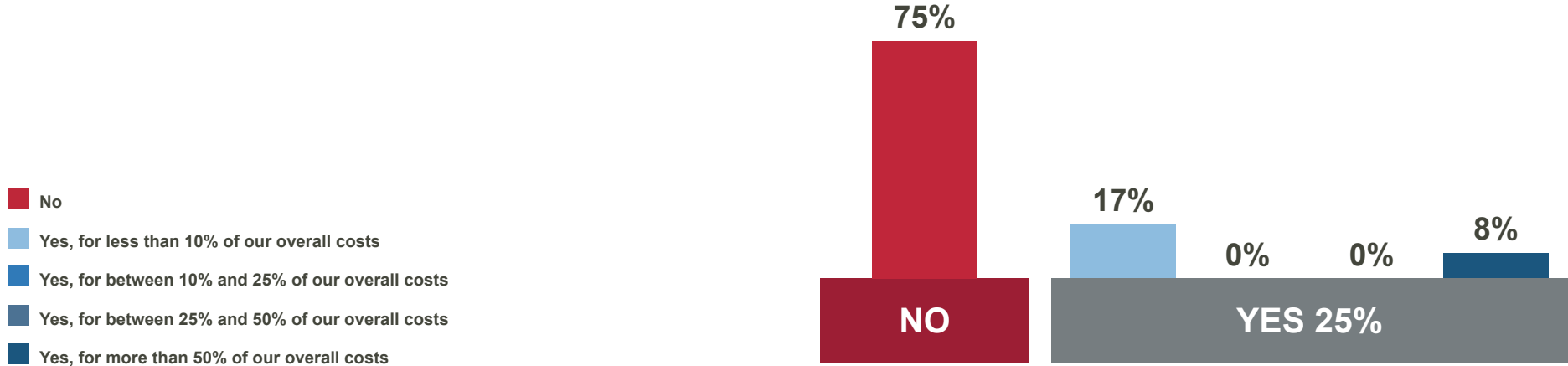


Operating Profits compared to 2019





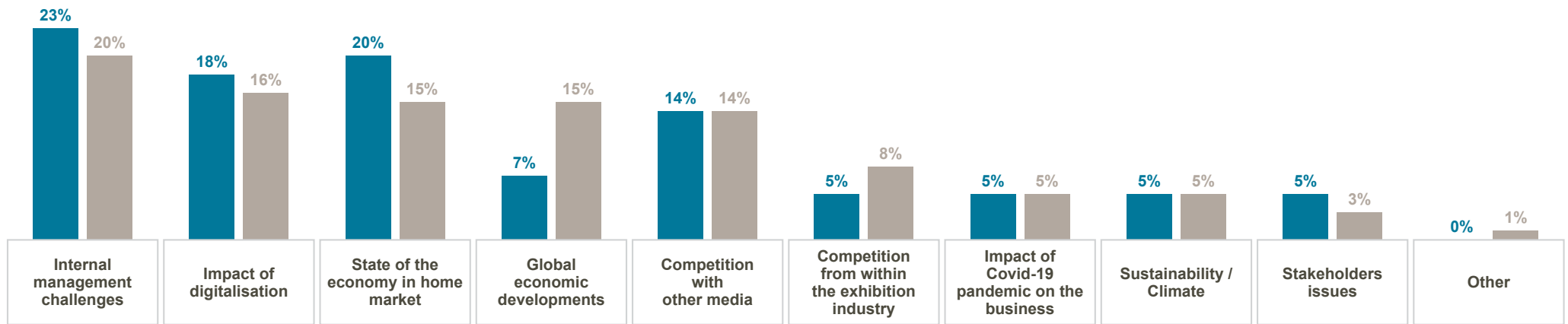
Did your company benefit from public financial support in 2022?





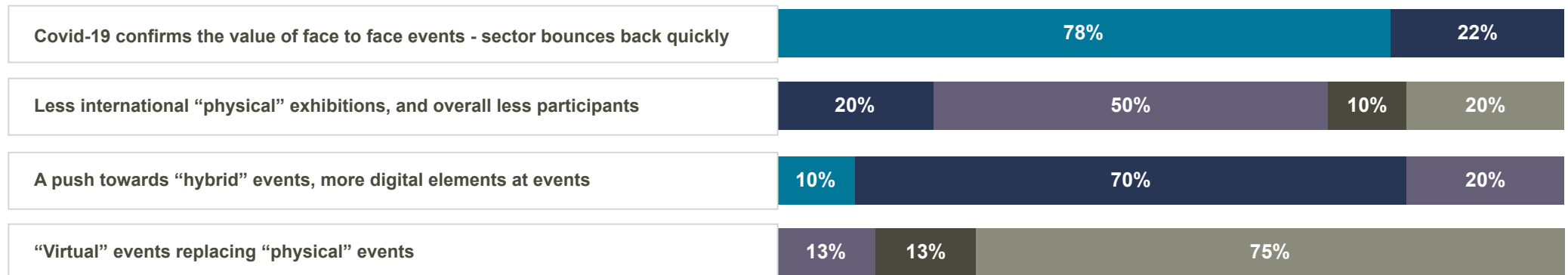
Most important business issues in the exhibition industry

Argentina
Global



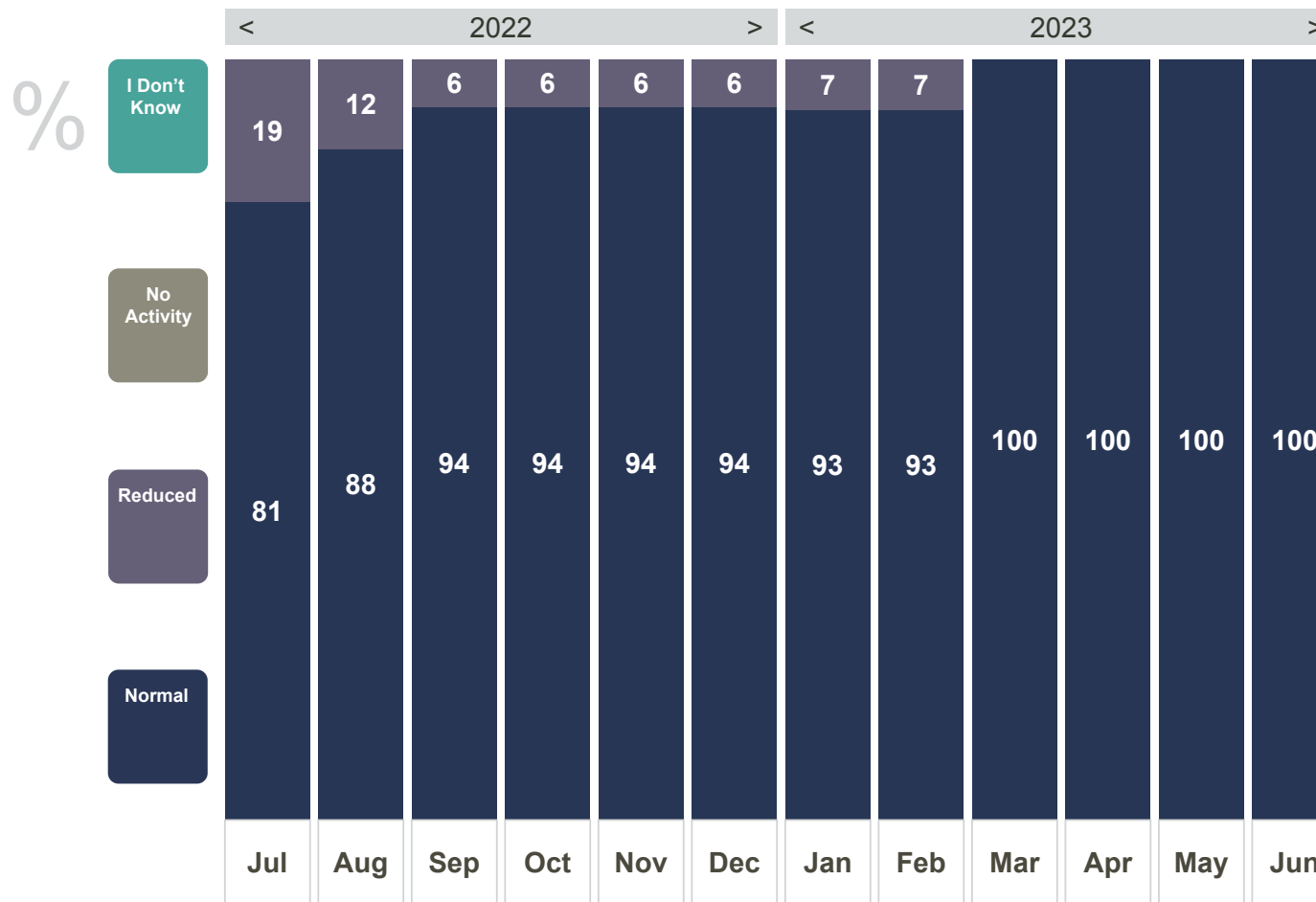
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



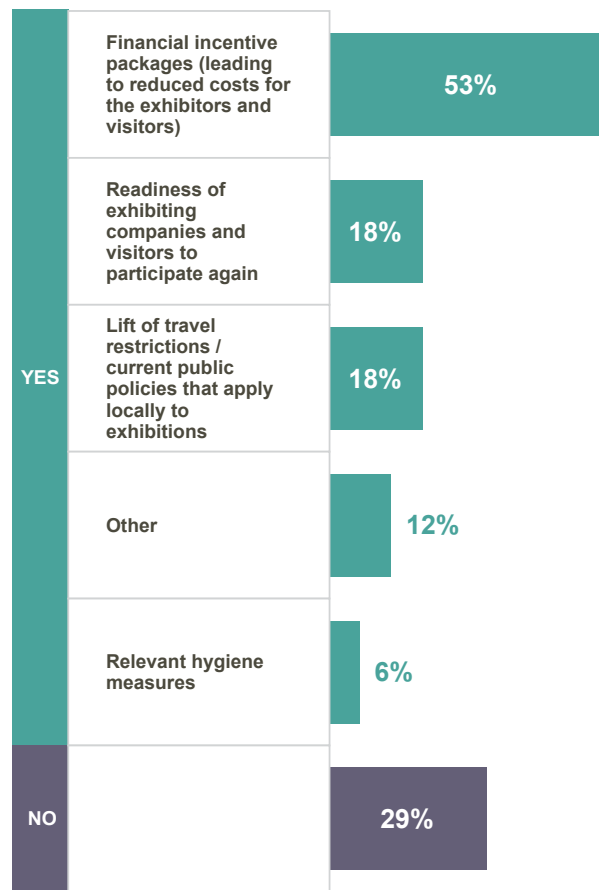
Detailed results for Brazil



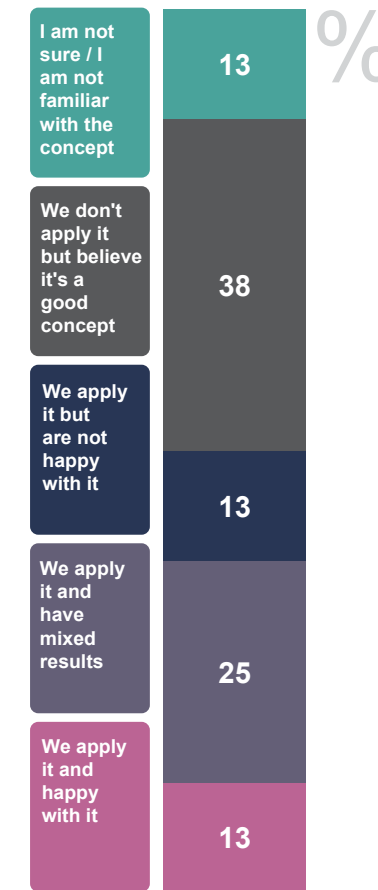
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



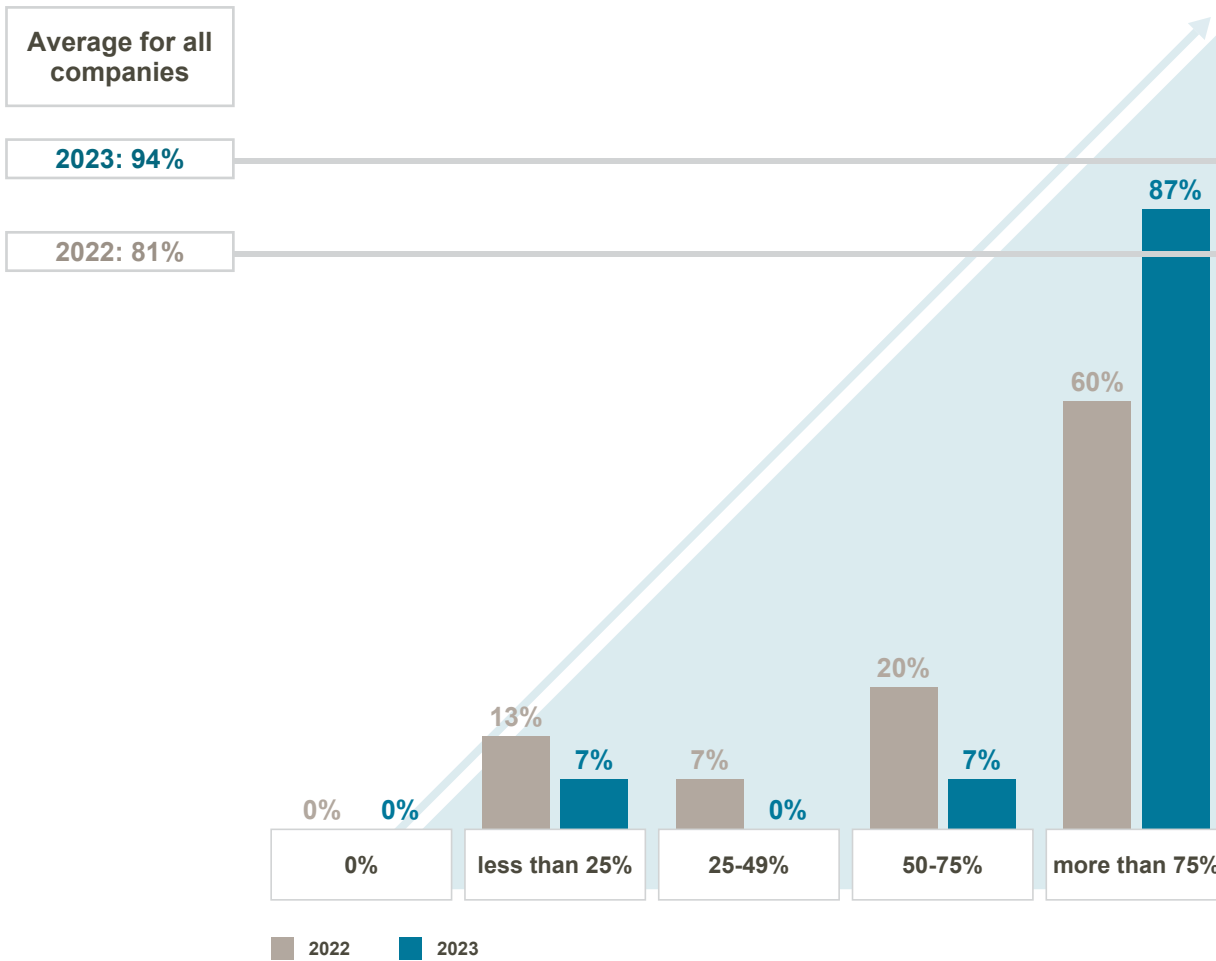
How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



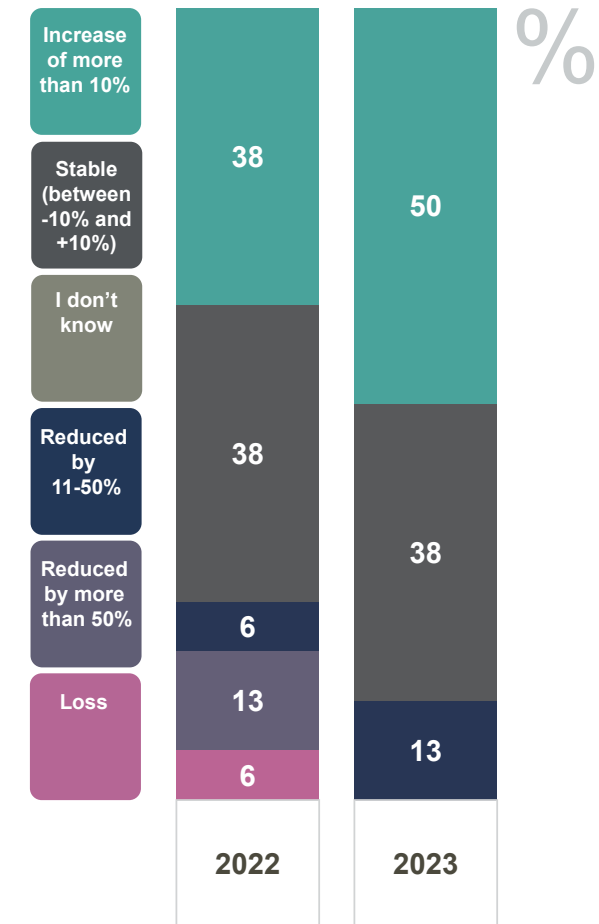
For organisers only (8 answers in total)



Revenue compared to 2019



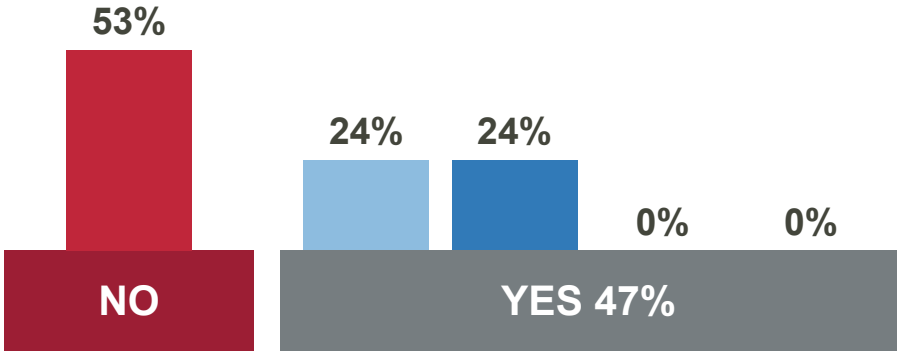
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

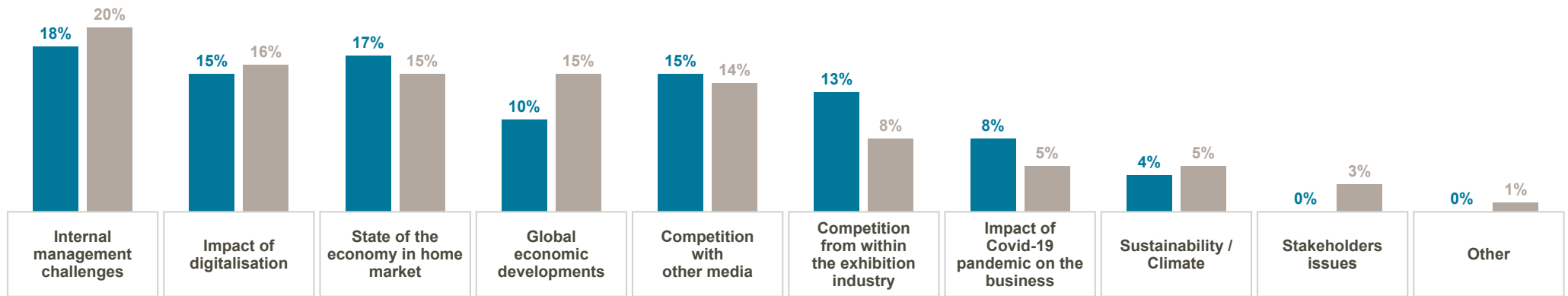
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





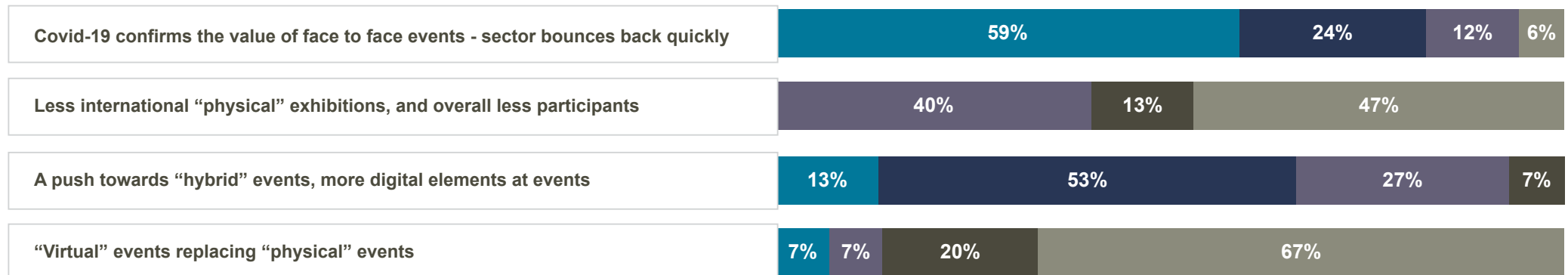
Most important business issues in the exhibition industry

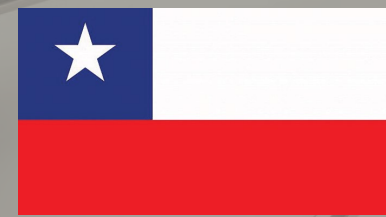
Brazil Global



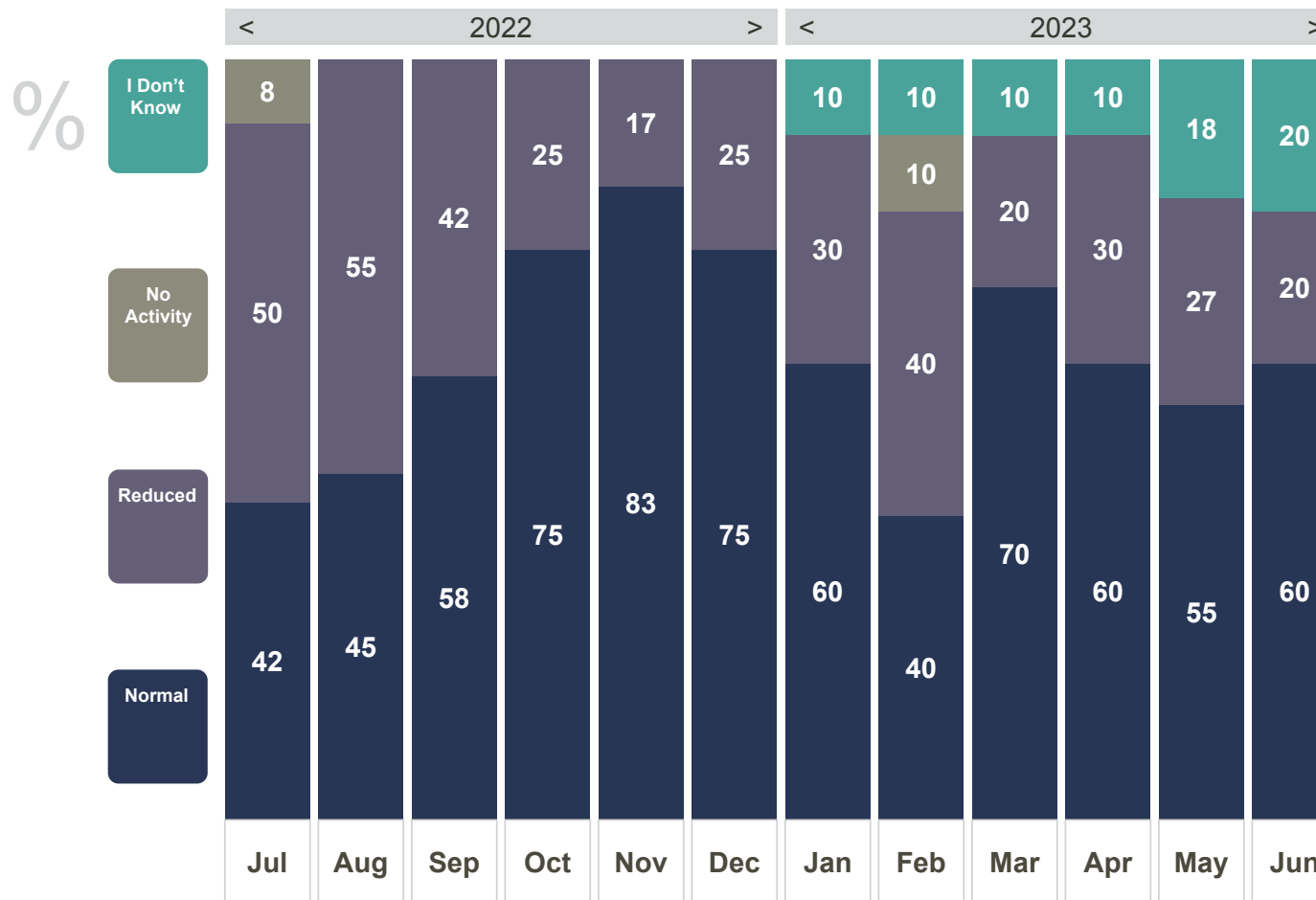
Format of exhibitions in the coming years

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

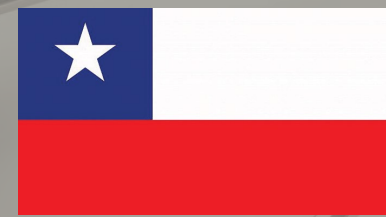




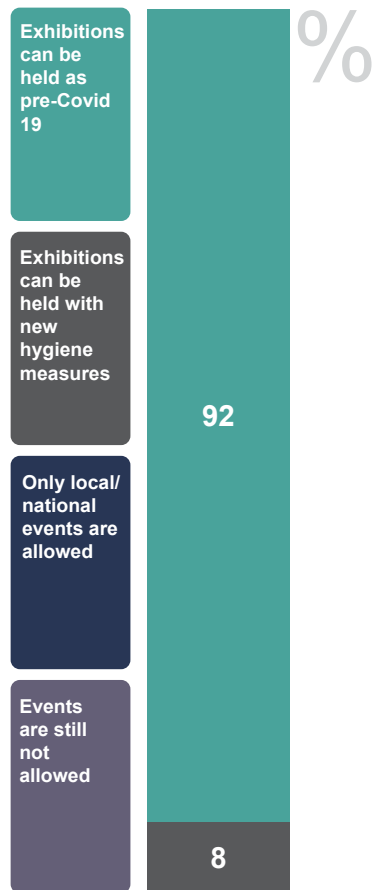
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



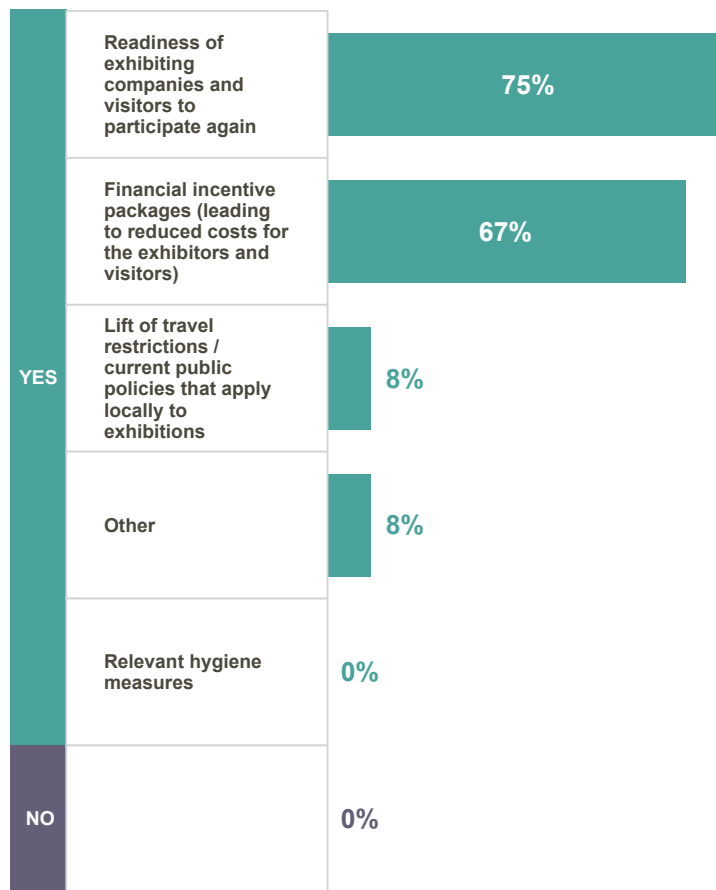
Detailed results for Chile



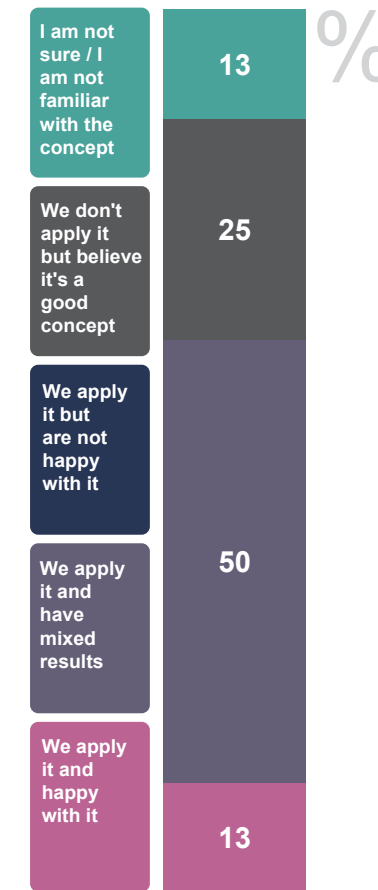
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

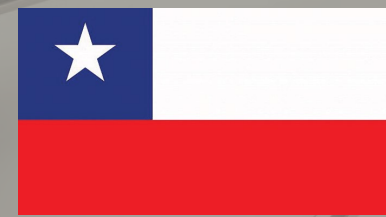


How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

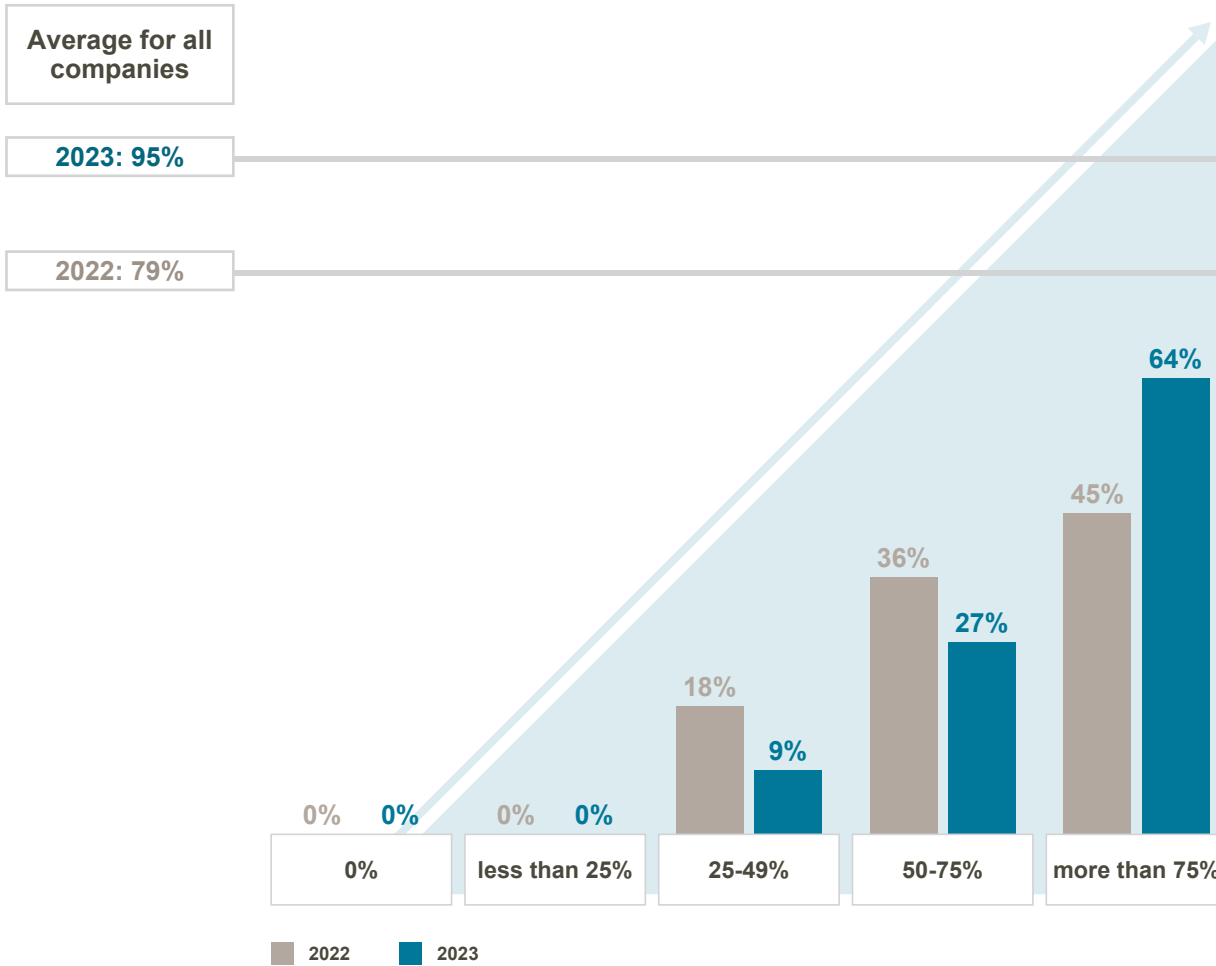


For organisers only (8 answers in total)

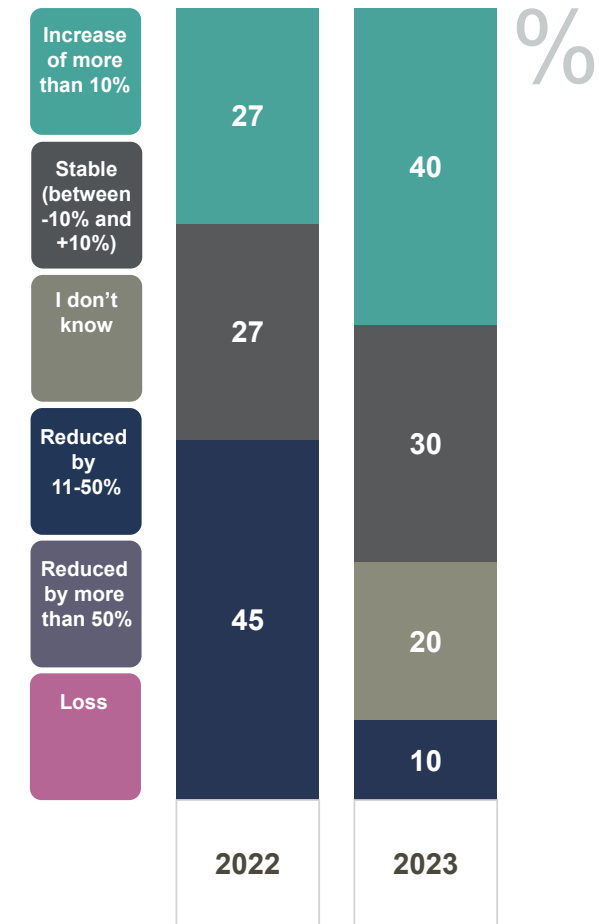
Detailed results for Chile

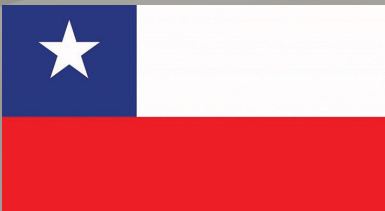


Revenue compared to 2019

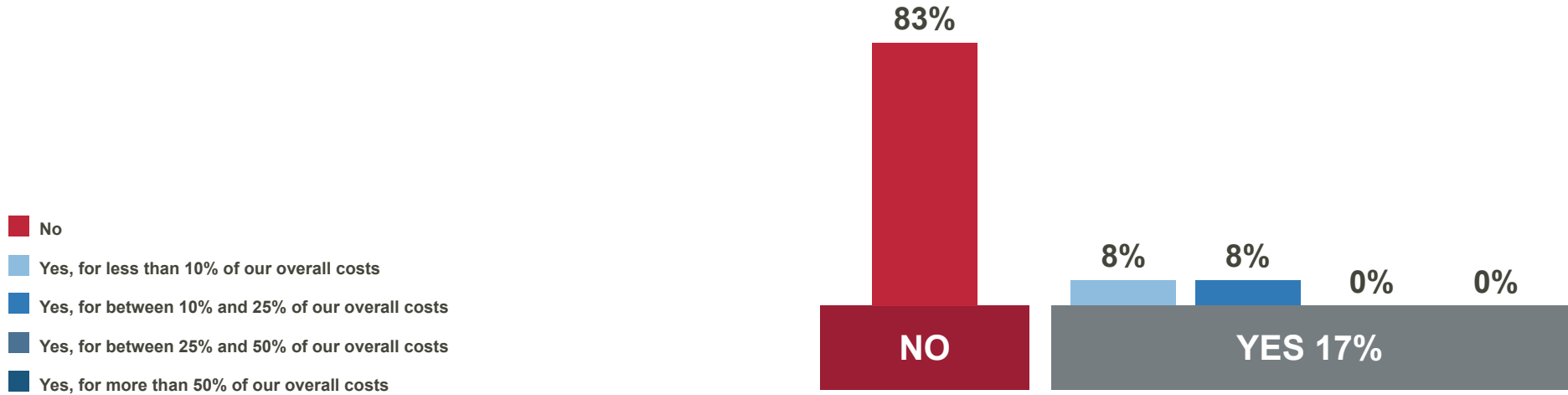


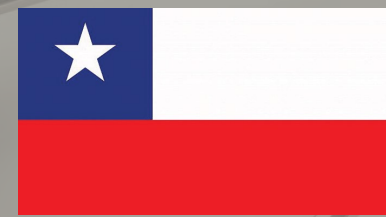
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

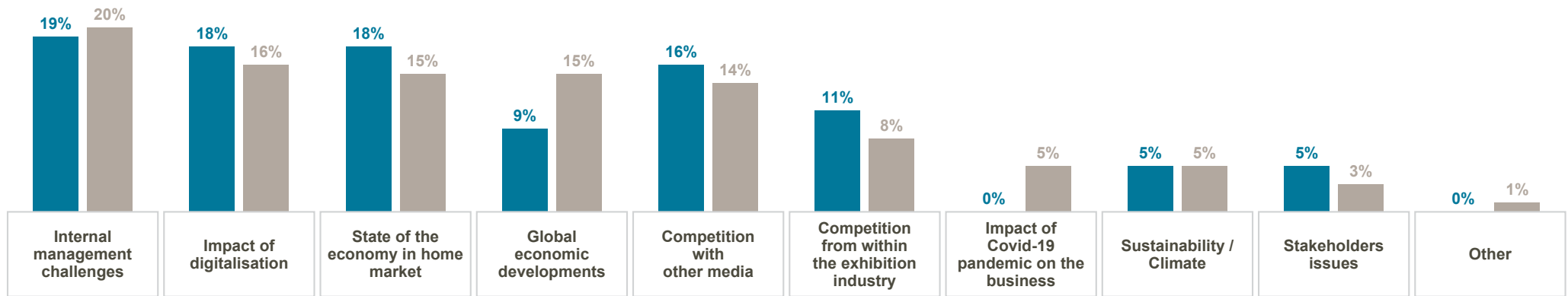




Most important business issues in the exhibition industry

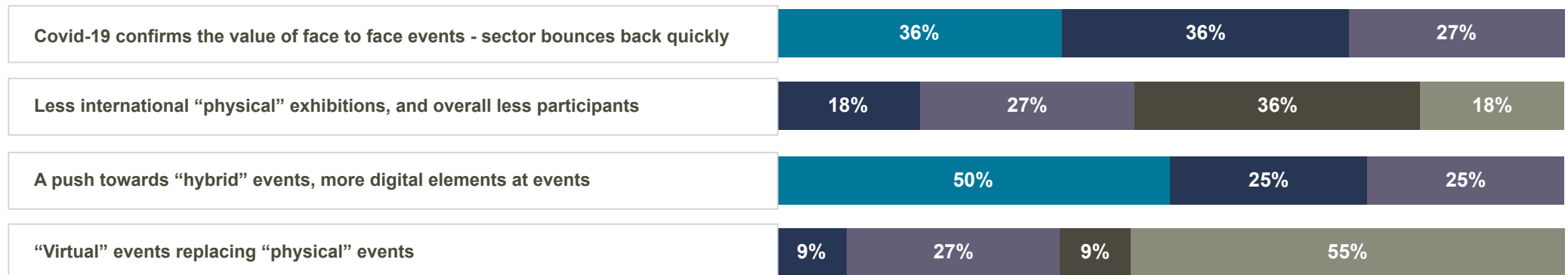
Chile

Global



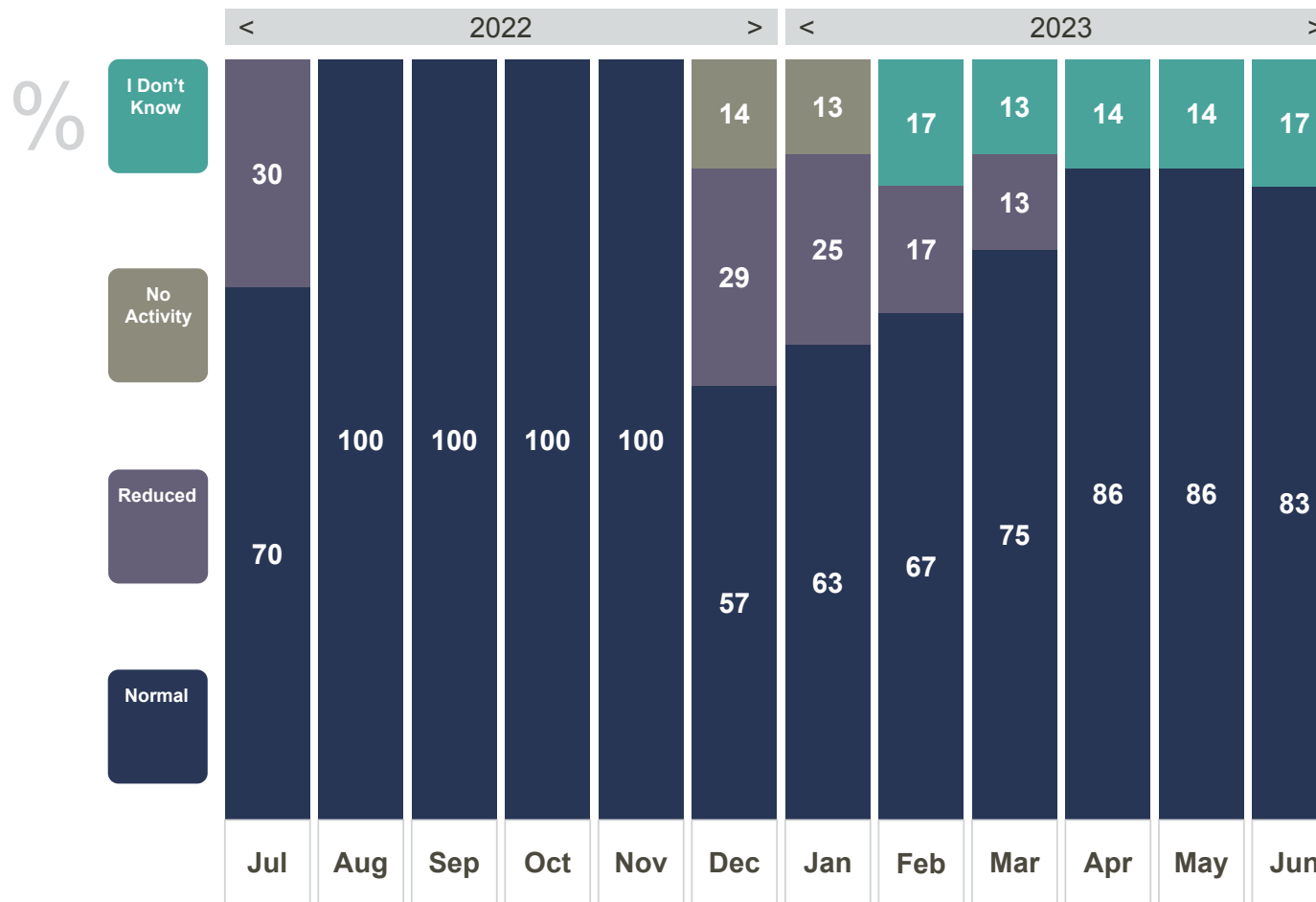
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



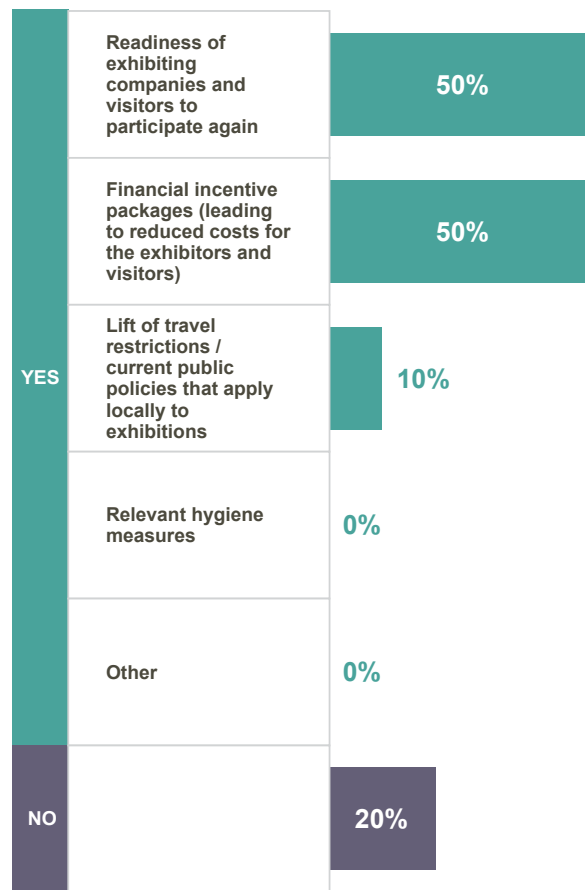
Detailed results for Colombia



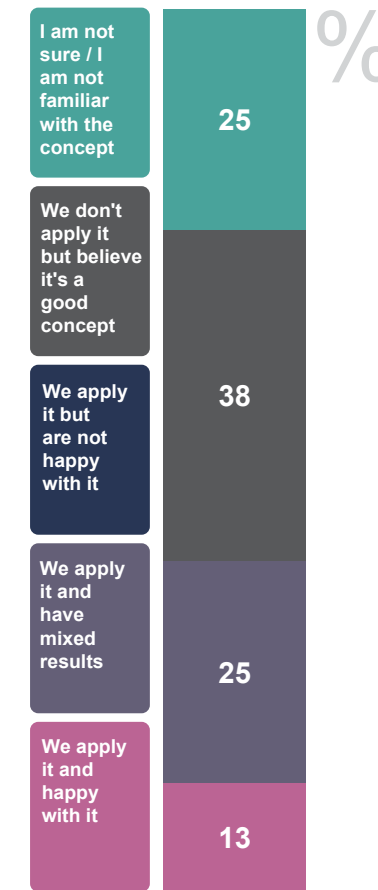
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

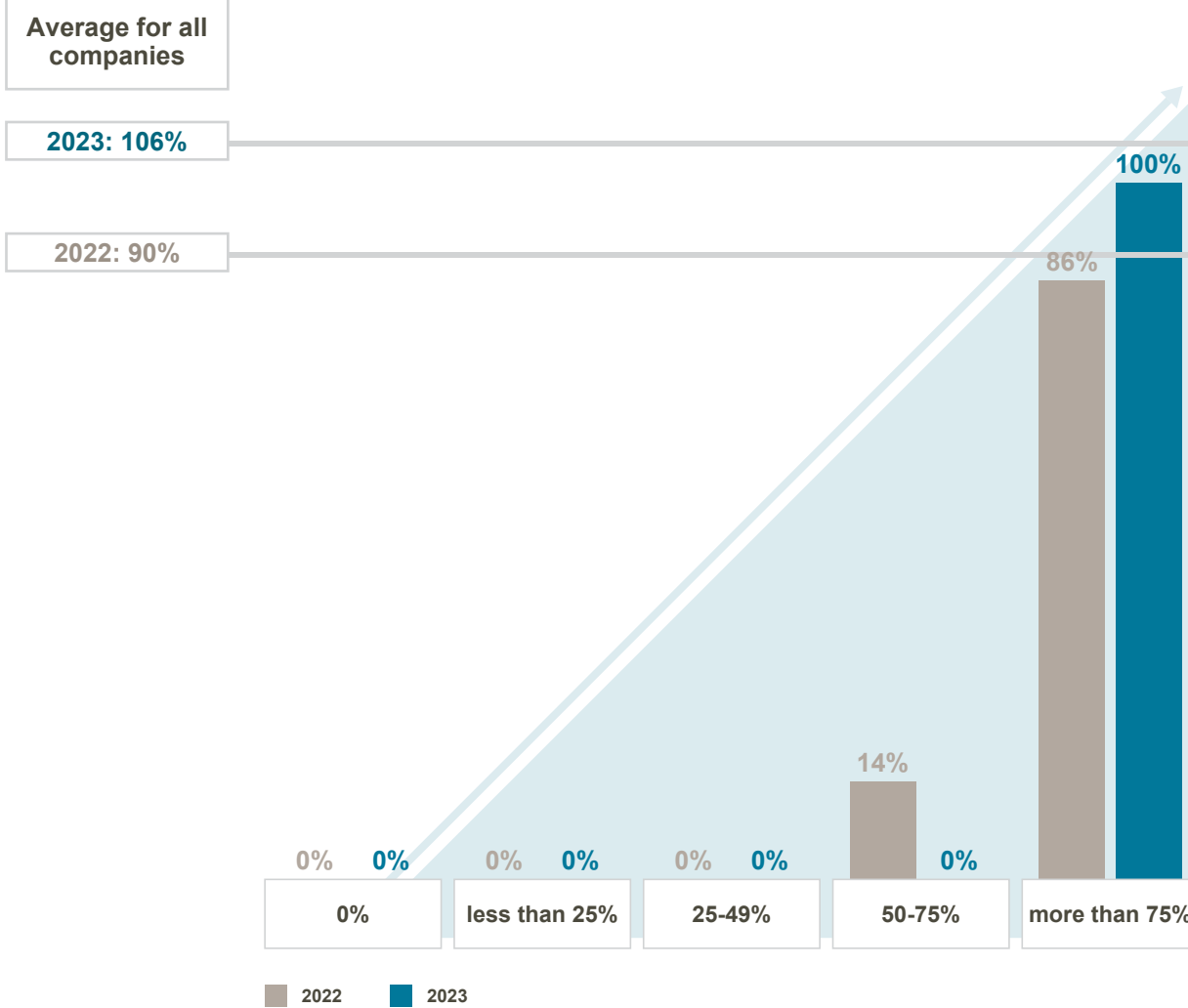


For organisers only (8 answers in total)

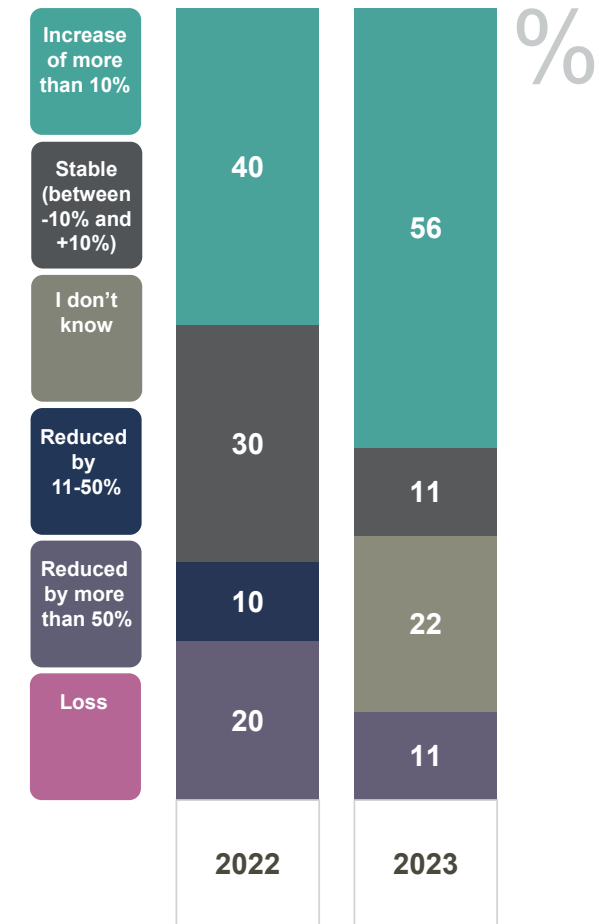
Detailed results for Colombia



Revenue compared to 2019



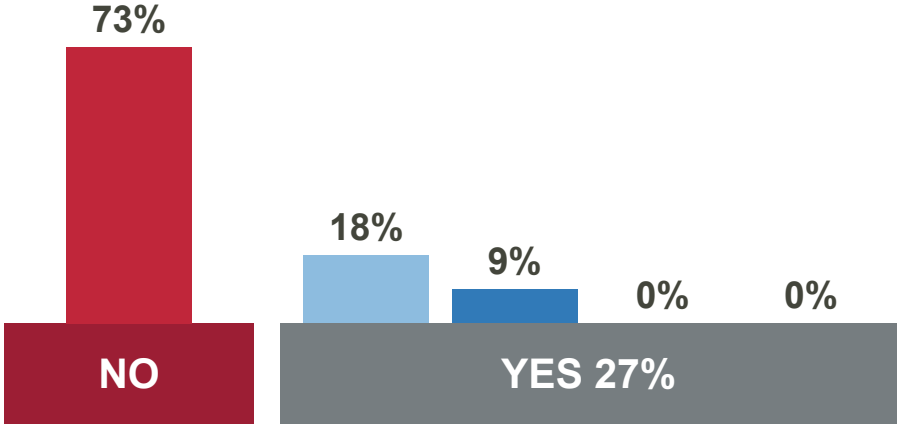
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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



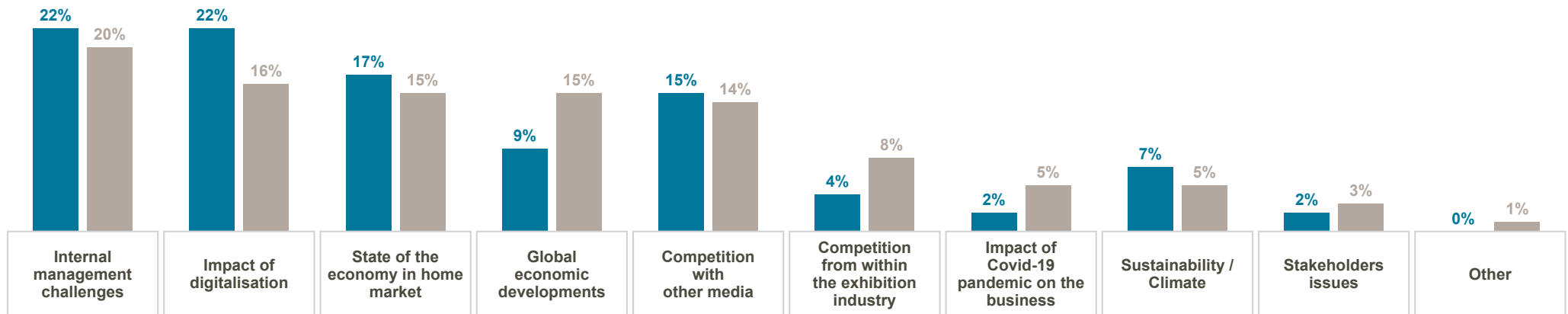
Detailed results for Colombia



Most important business issues in the exhibition industry

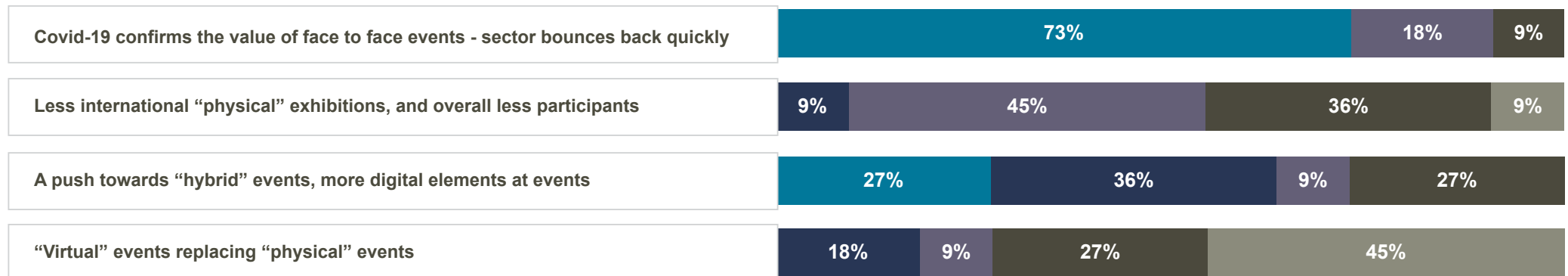
Colombia

Global



Format of exhibitions in the coming years

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



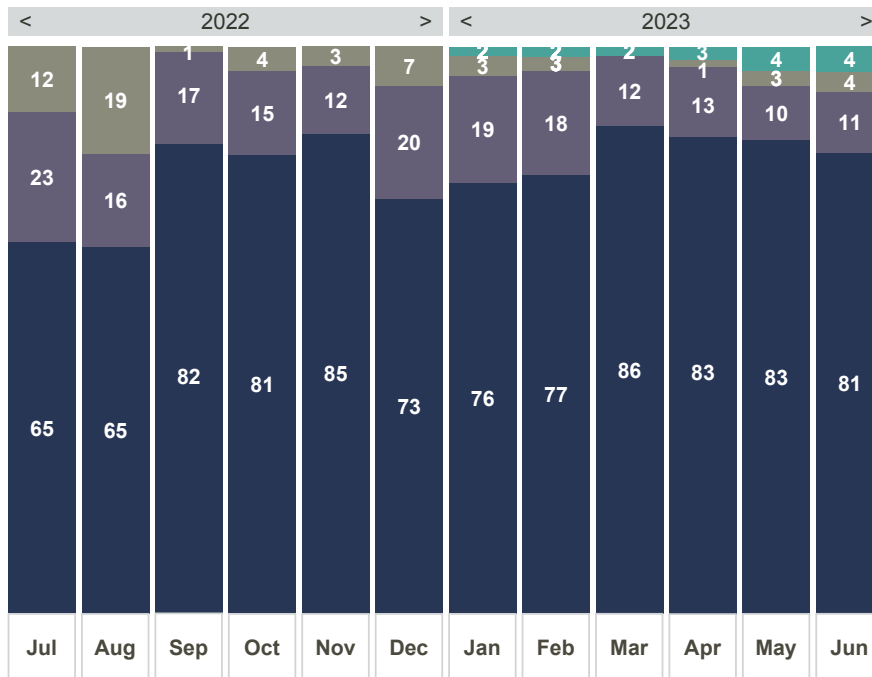
A network of interconnected nodes and lines on a teal background. The nodes are represented by semi-transparent spheres, and the lines are thin, light-colored rods connecting them. The network is dense and extends across the entire frame, creating a sense of connectivity and structure.

Europe

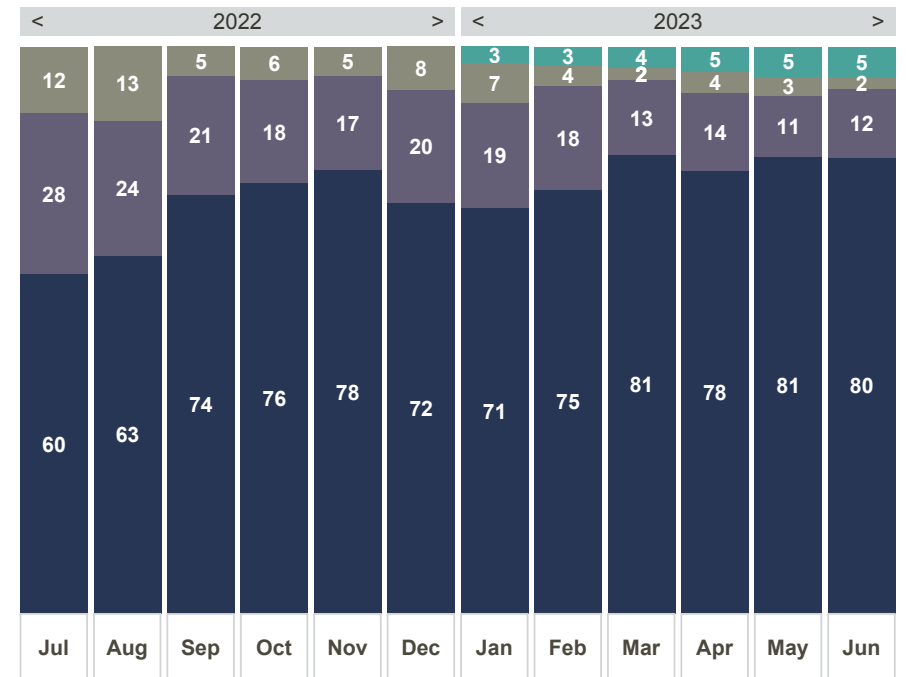
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



Europe



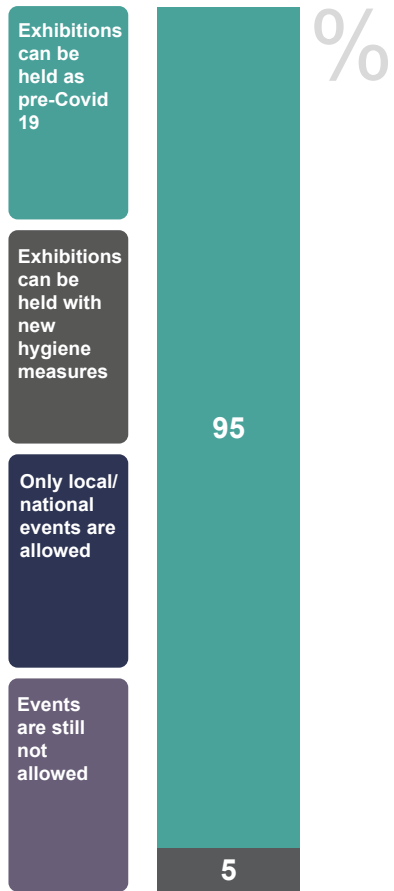
World



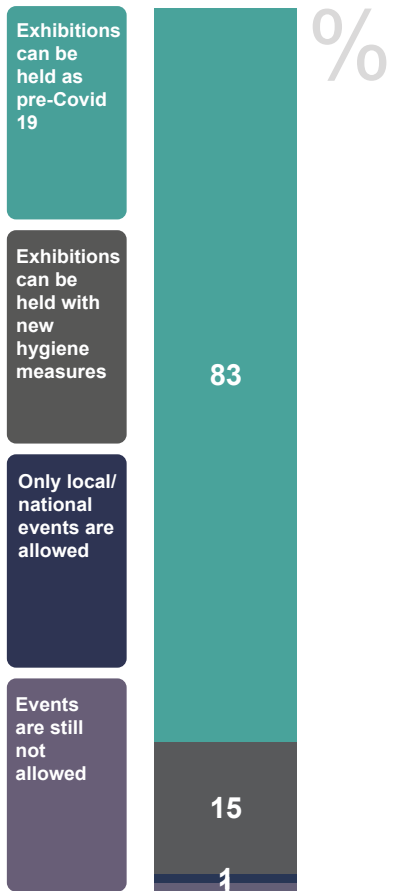


What is the overall status of operations in your city?

Europe

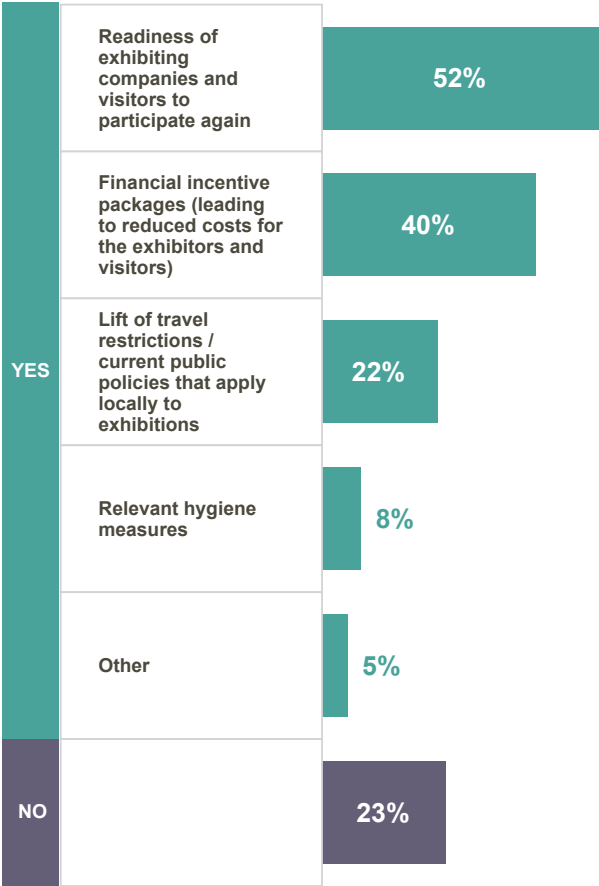


World

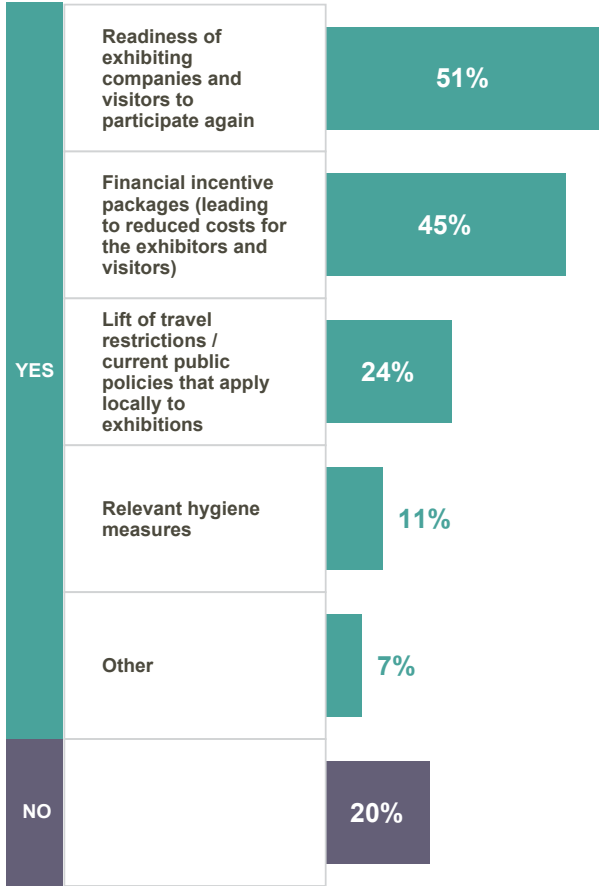


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

Europe

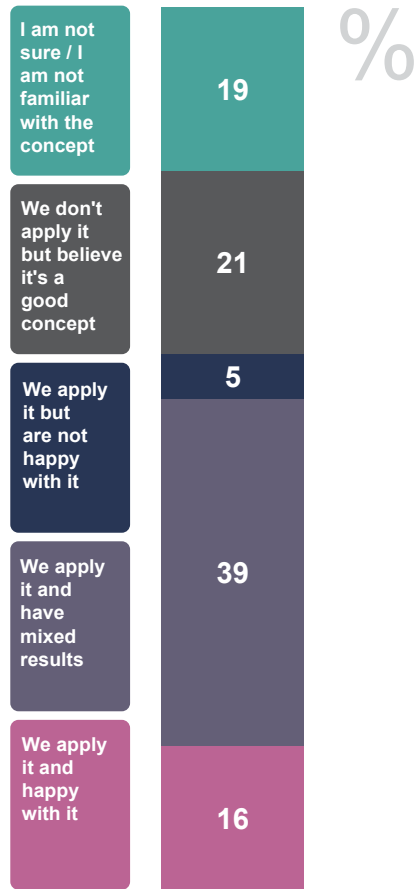


World



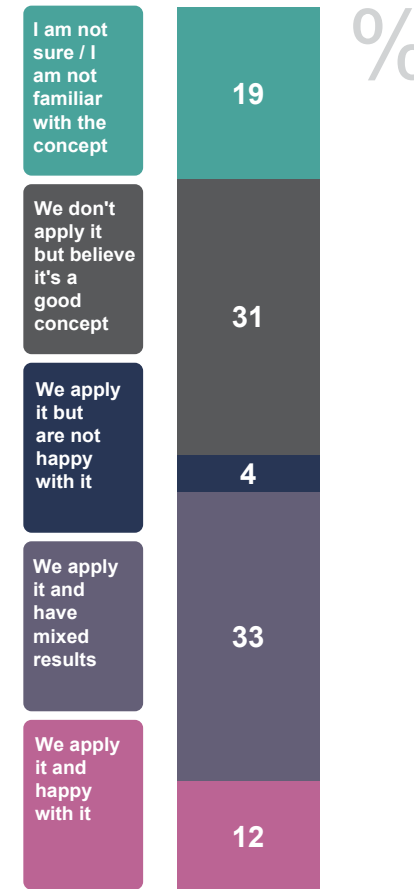
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

Europe



For organisers only (97 answers in total)

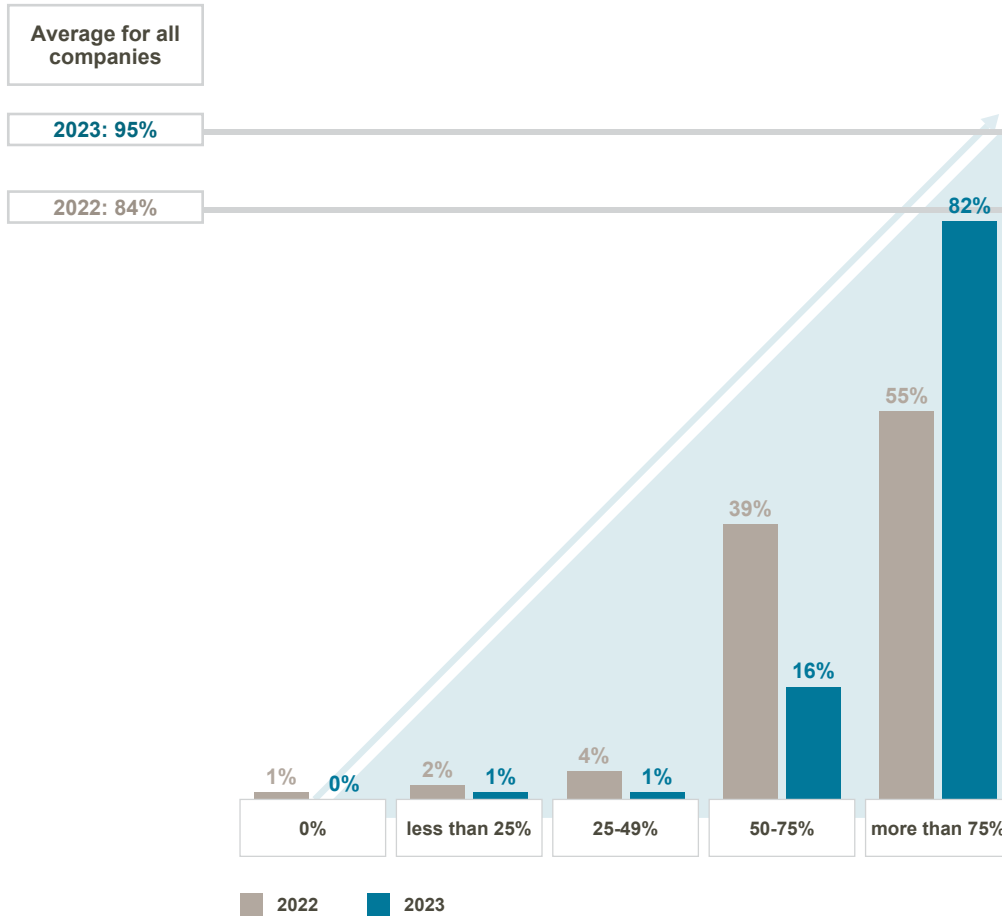
World



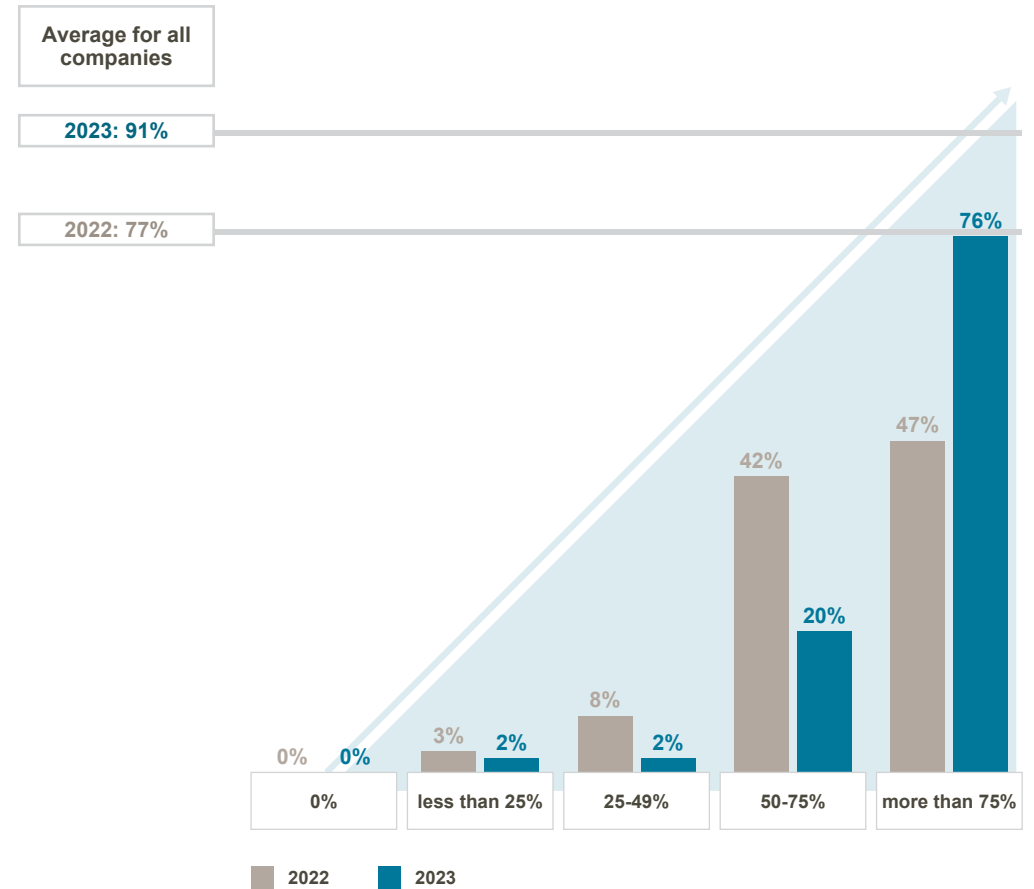
For organisers only (257 answers in total)

Revenue compared to 2019

Europe

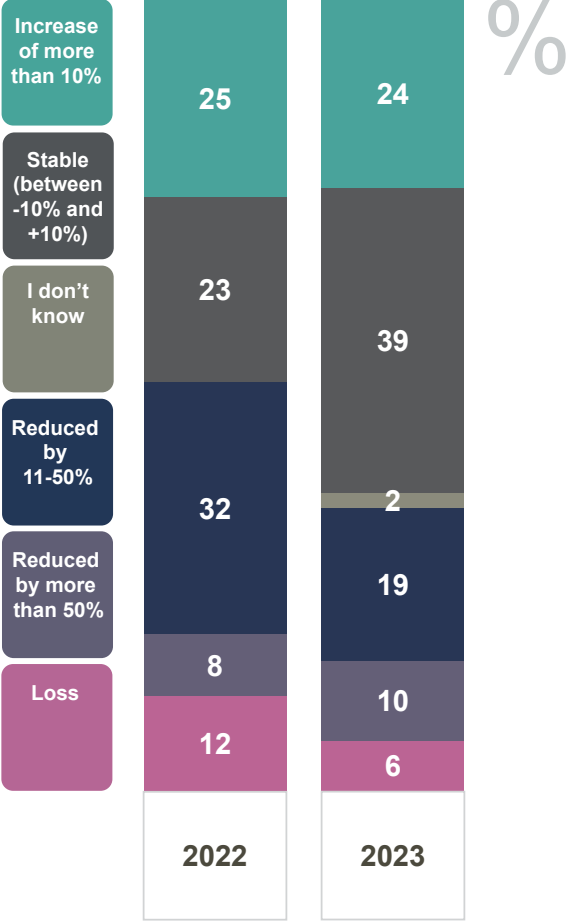


World

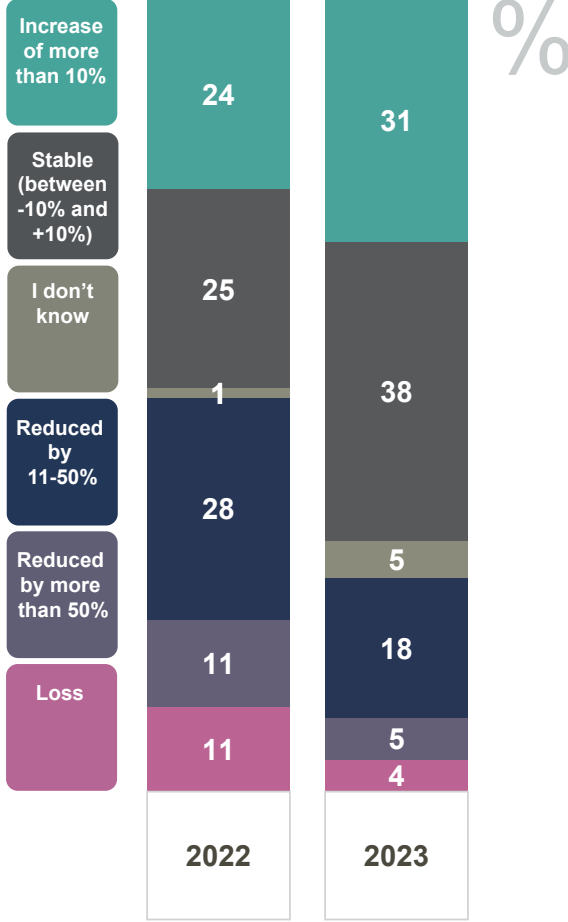


Operating Profits compared to 2019

Europe



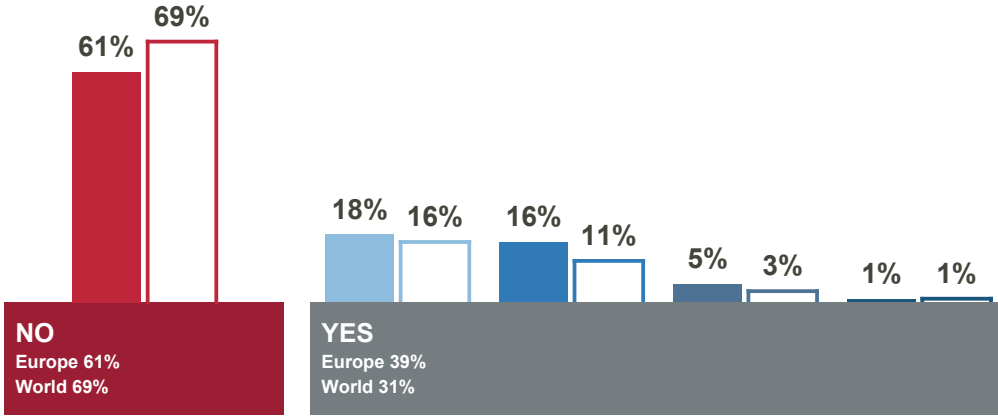
World



Did your company benefit from public financial support in 2022?

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

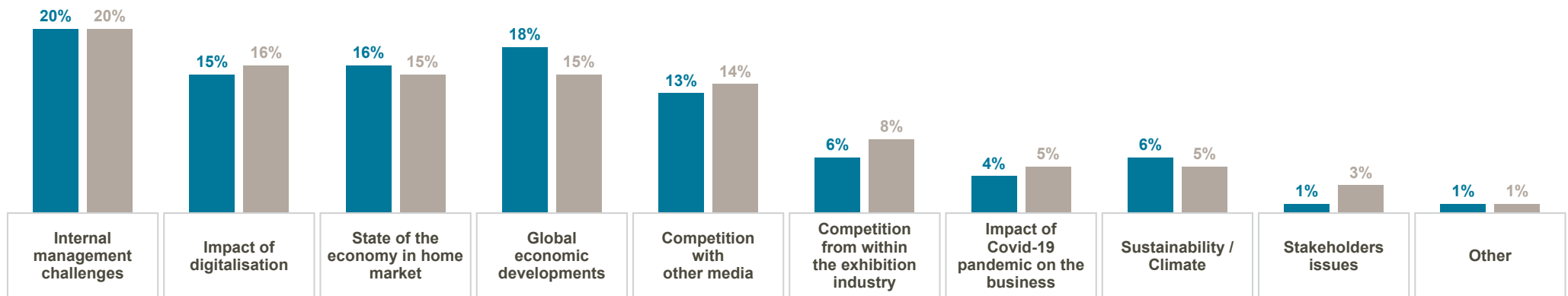


Most Important Business Issues - Format of Exhibitions - Europe

Most important business issues in the exhibition industry

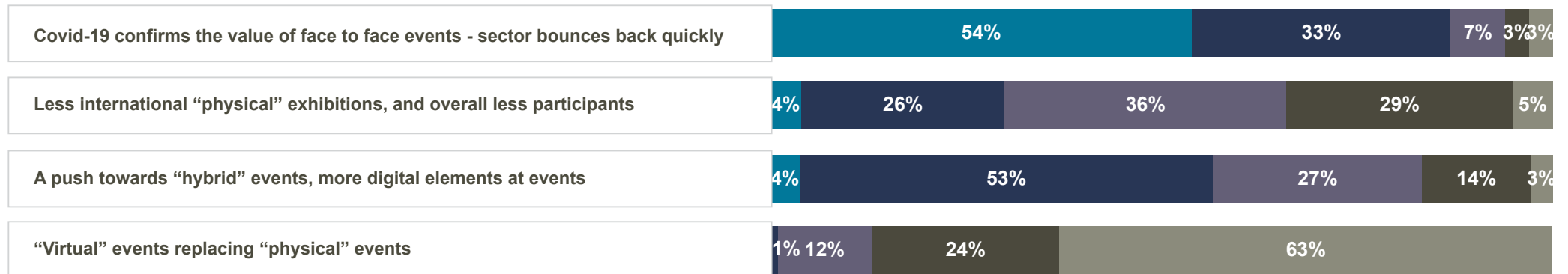
Europe

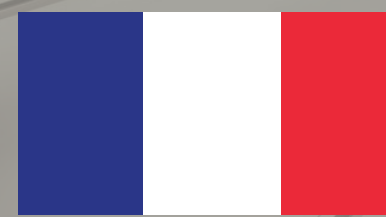
Global



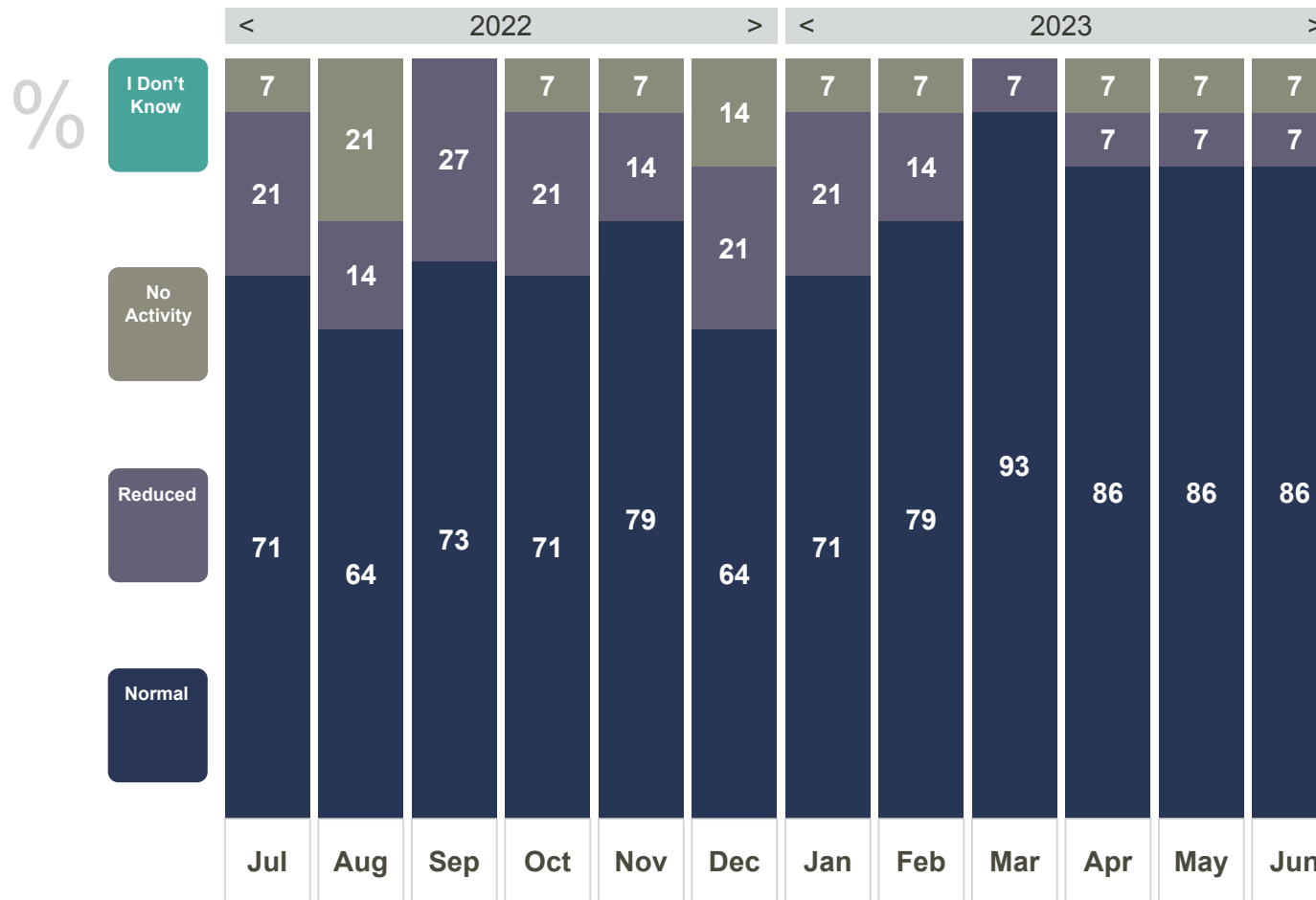
Format of exhibitions in the coming years

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

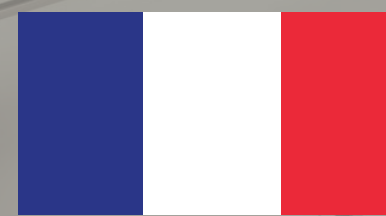




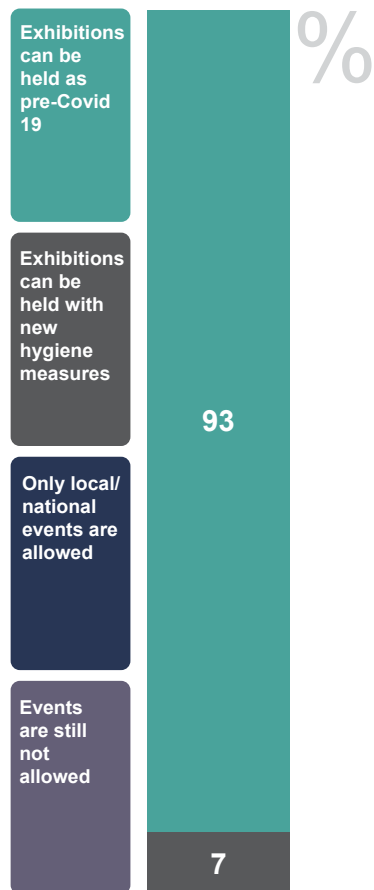
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



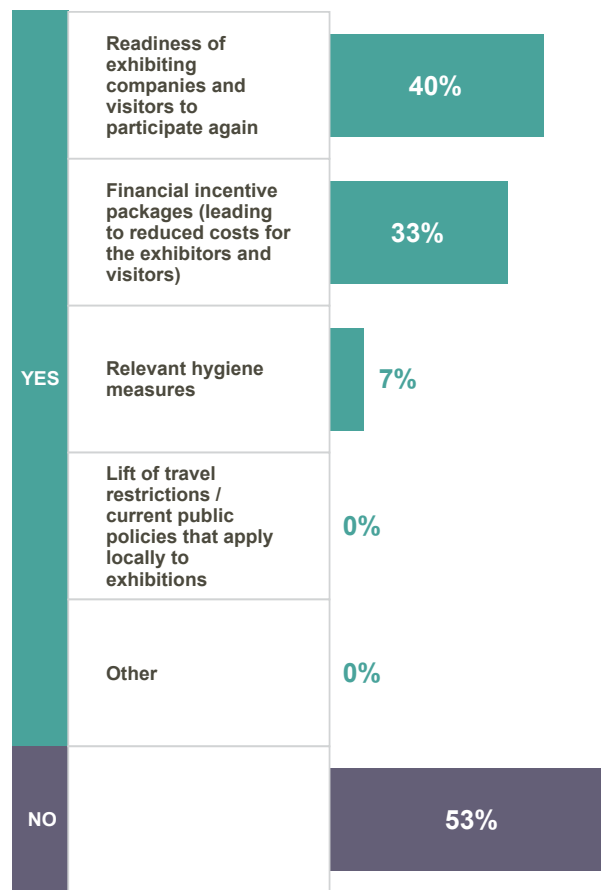
Detailed results for France



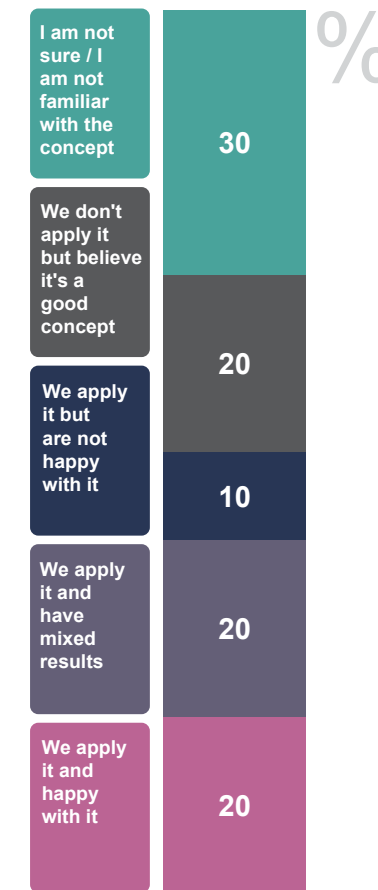
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

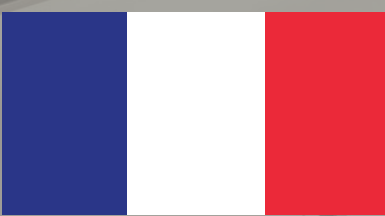


How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

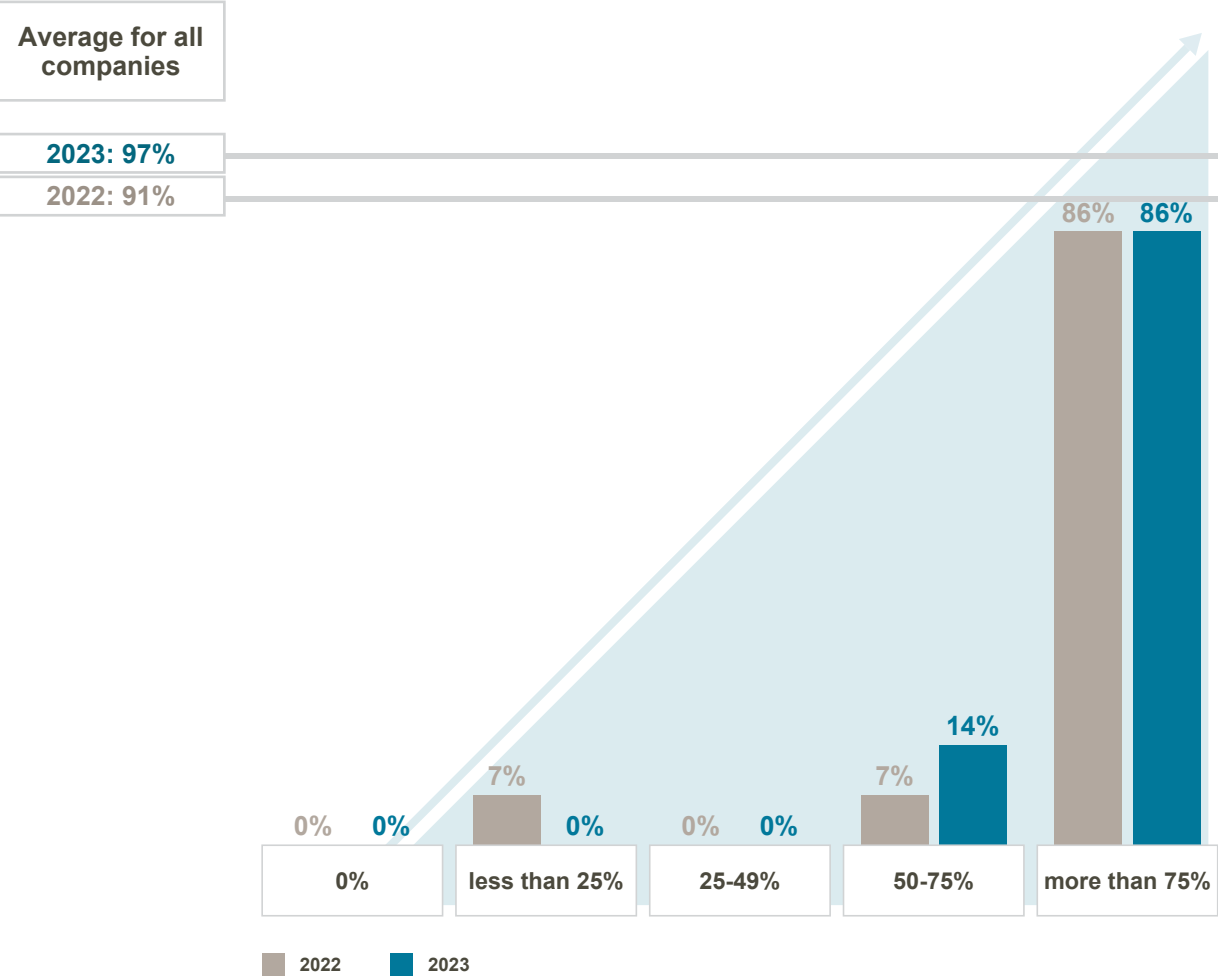


For organisers only (10 answers in total)

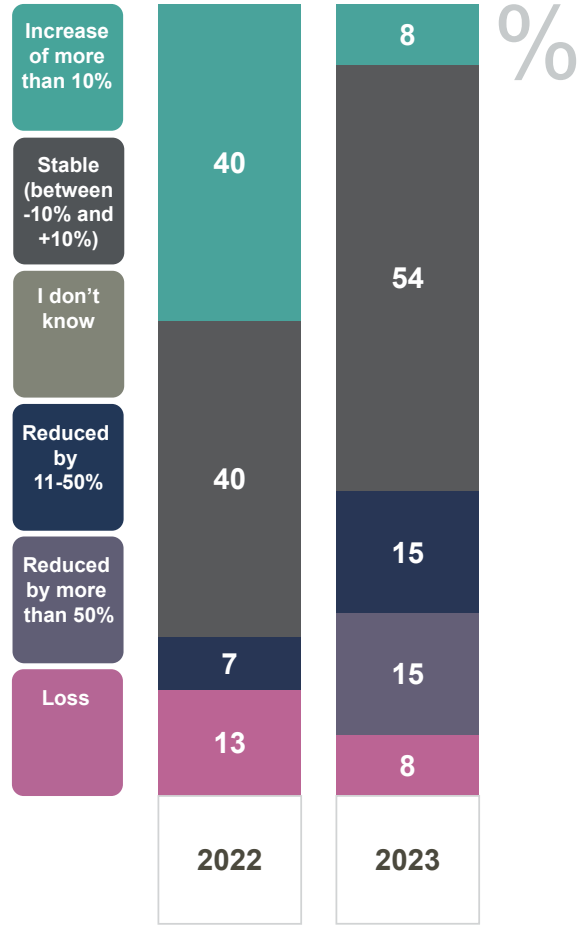
Detailed results for France

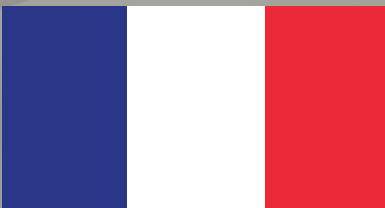


Revenue compared to 2019



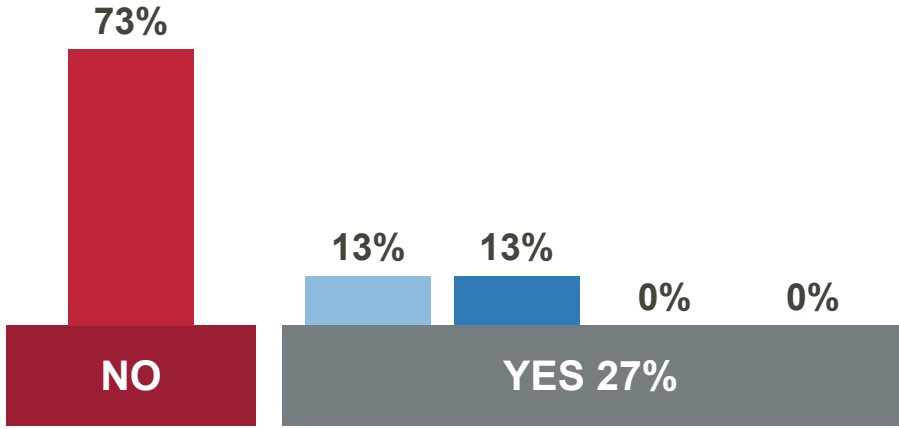
Operating Profits compared to 2019

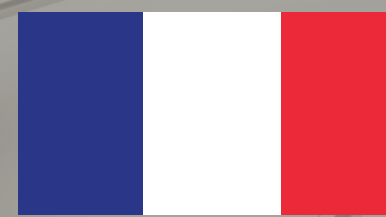




Did your company benefit from public financial support in 2022?

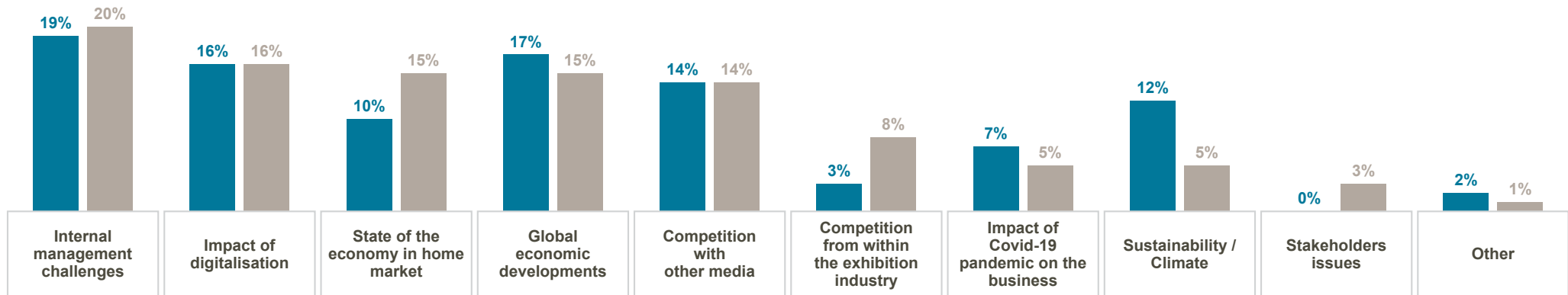
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





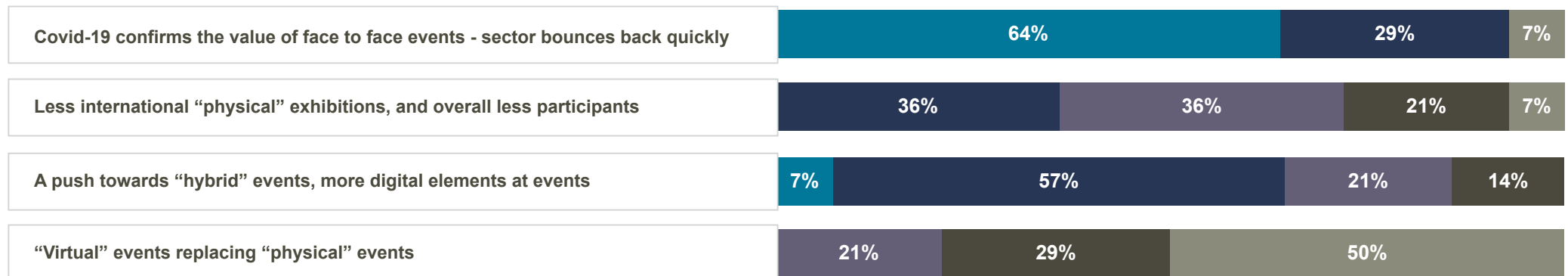
Most important business issues in the exhibition industry

France Global



Format of exhibitions in the coming years

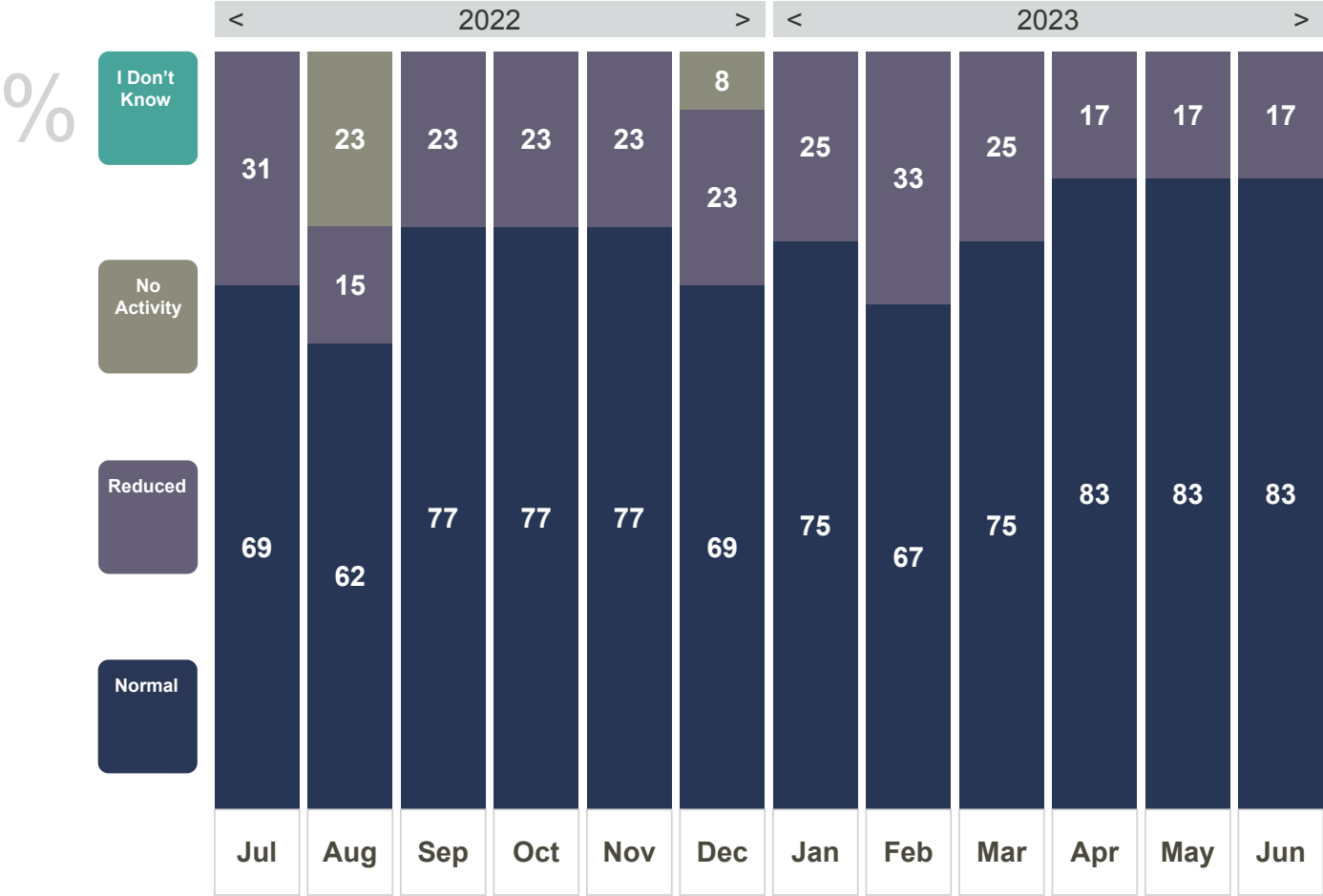
Yes, for sure Most probably Not sure Not sure at all Definitely not



Detailed results for Germany



Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



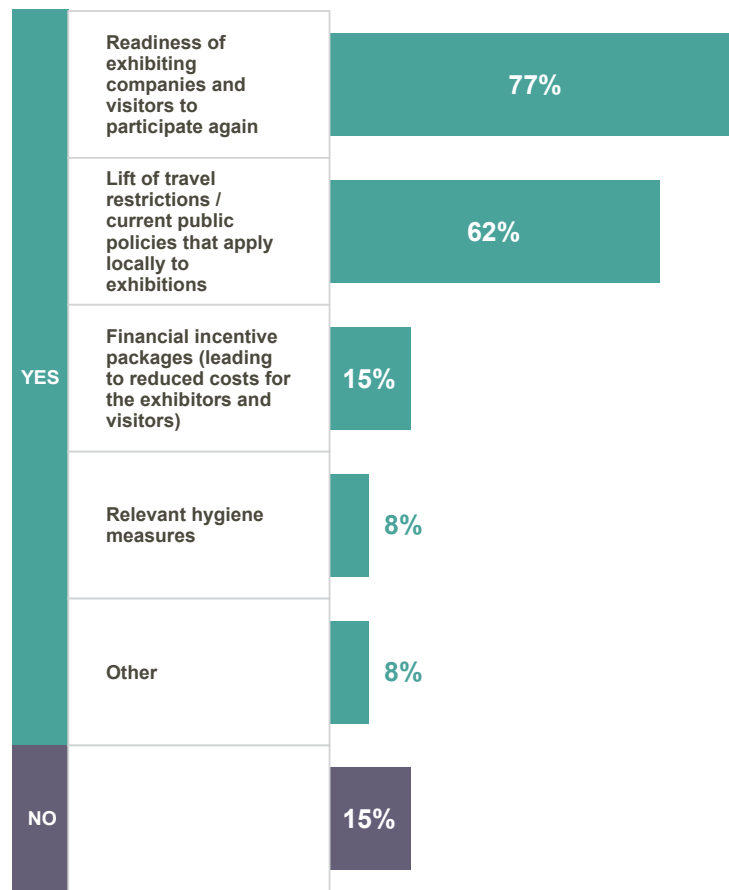
Detailed results for Germany



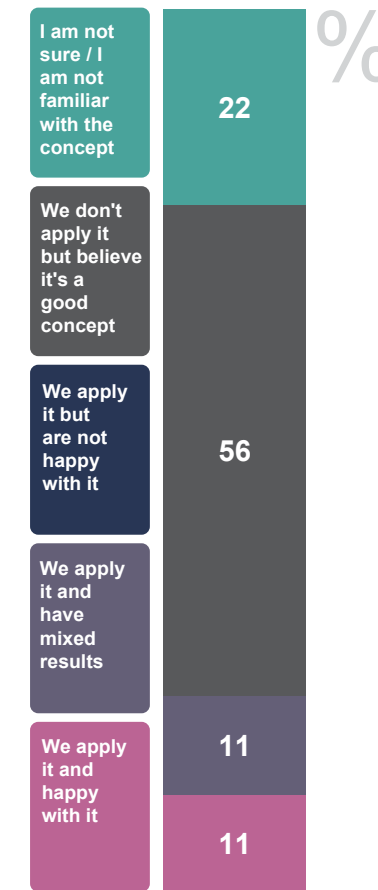
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



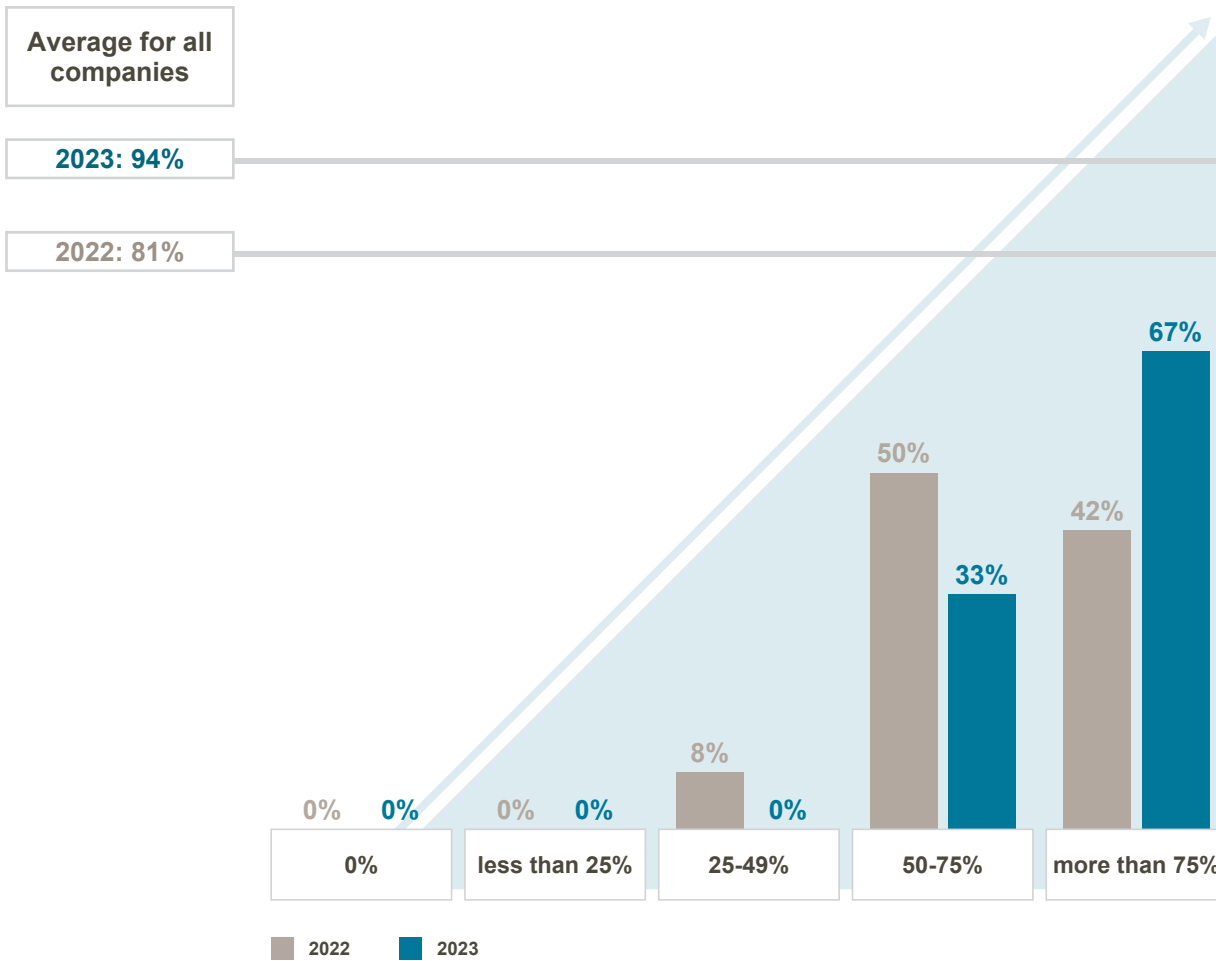
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



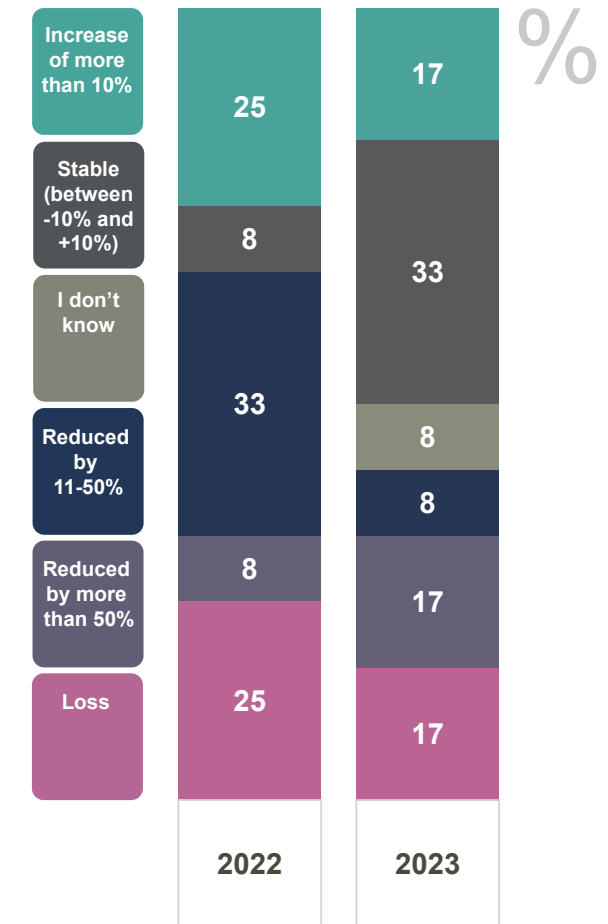
For organisers only (9 answers in total)



Revenue compared to 2019



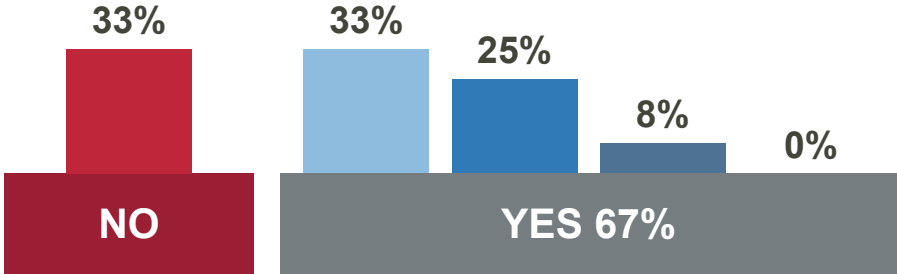
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

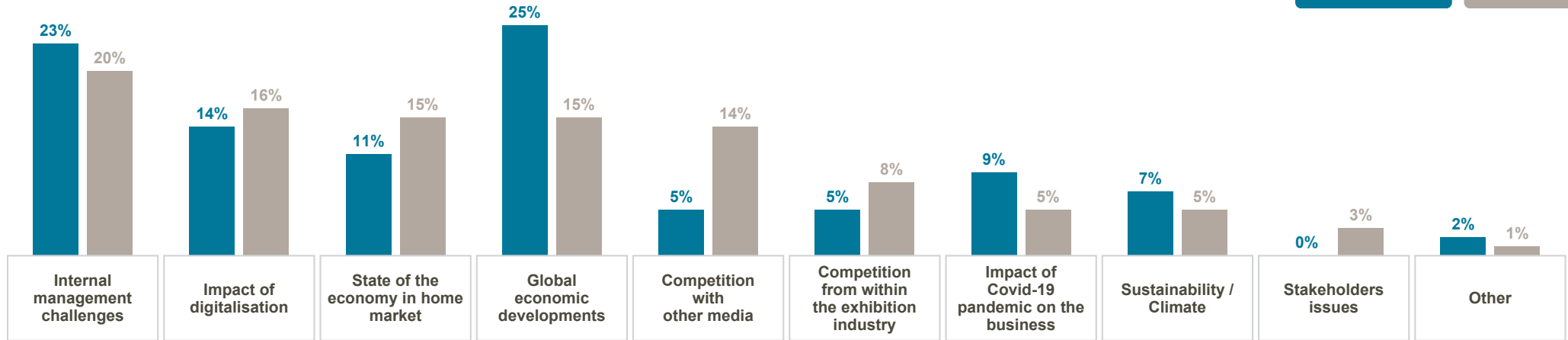




Most important business issues in the exhibition industry

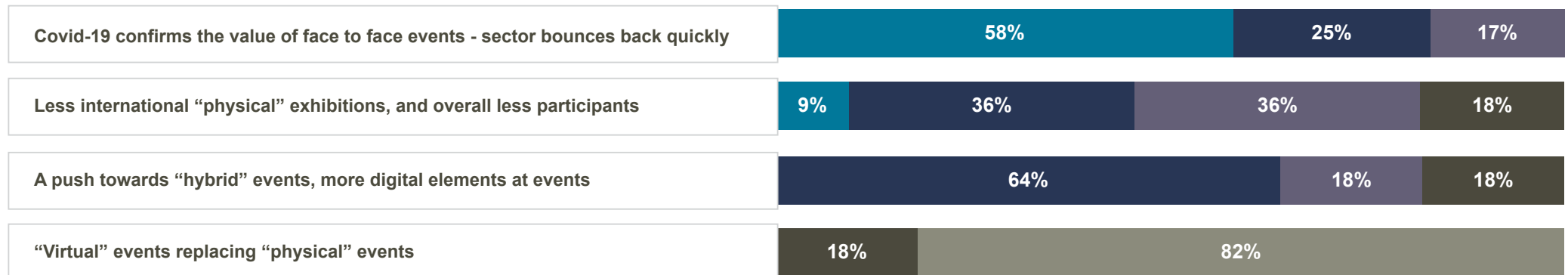
Germany

Global



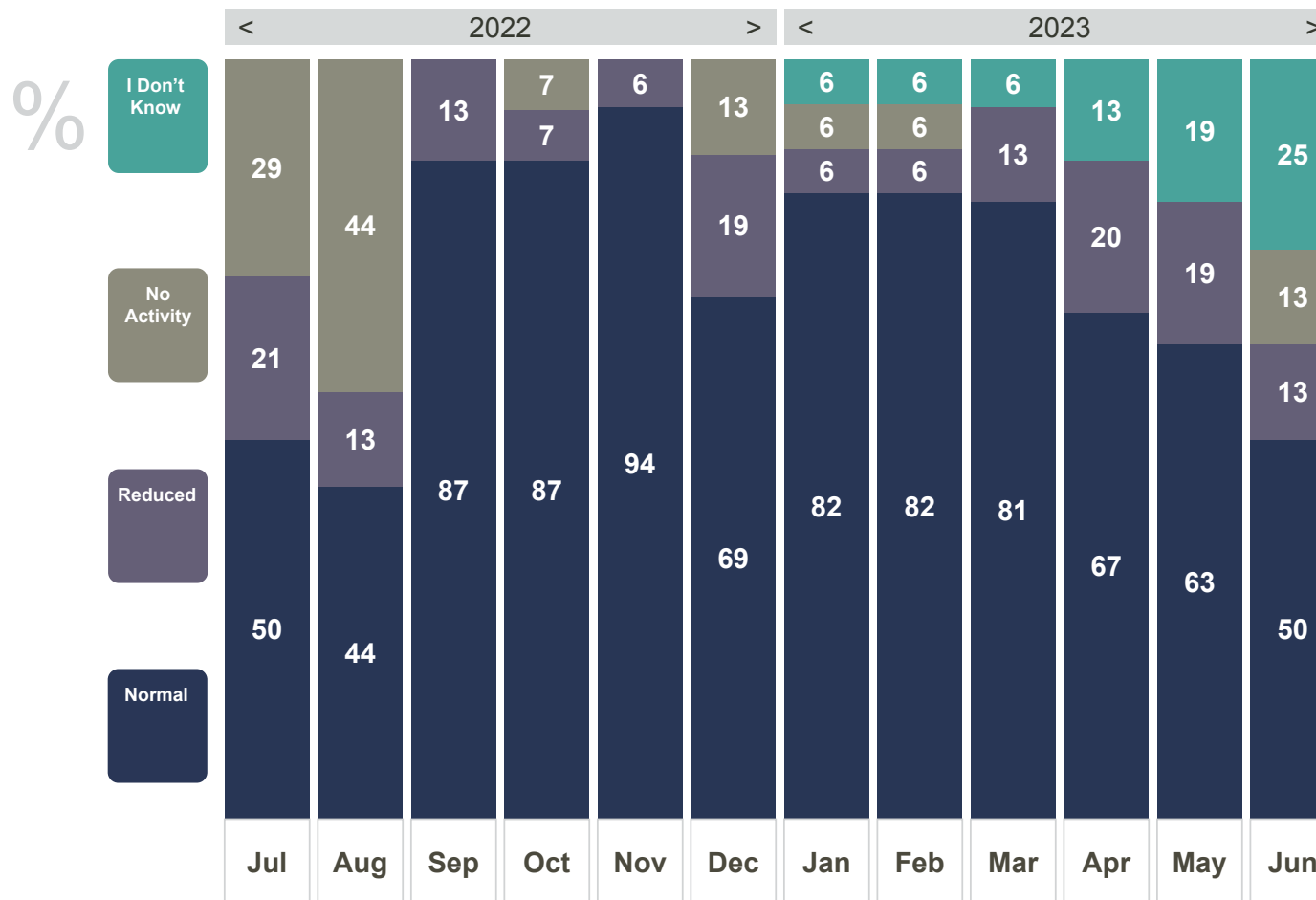
Format of exhibitions in the coming years

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





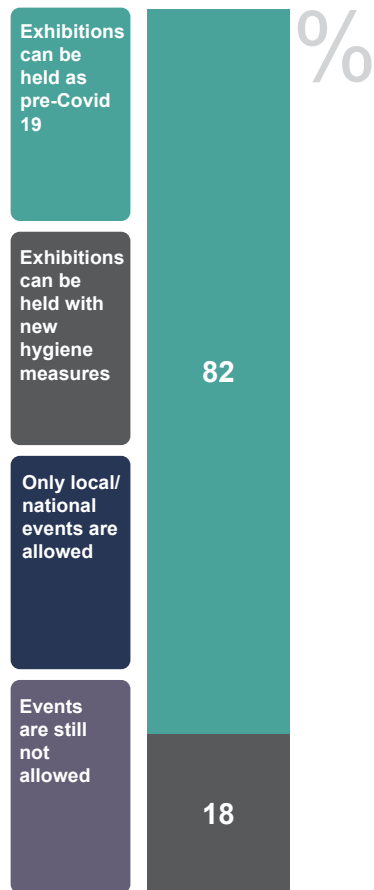
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



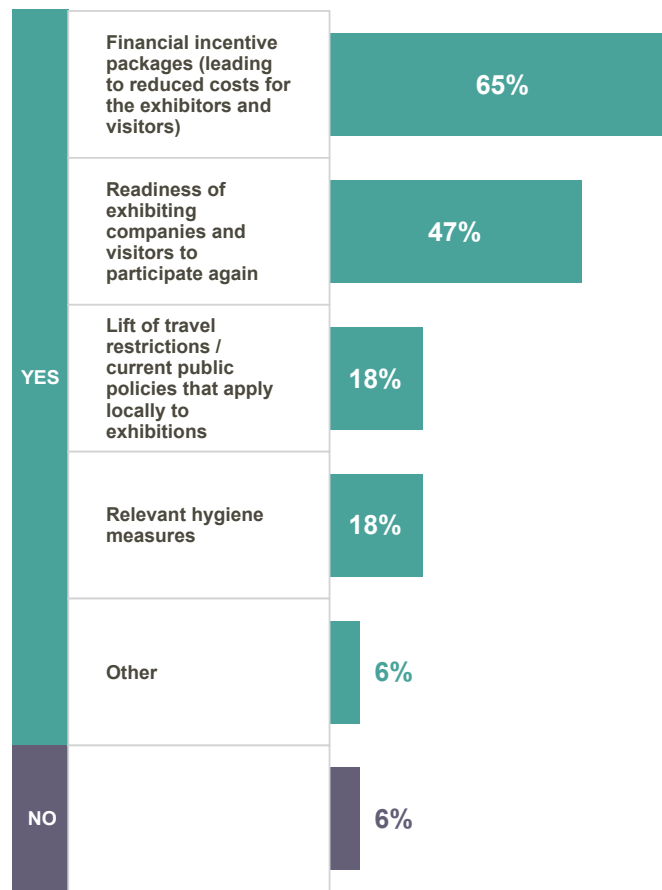
Detailed results for Greece



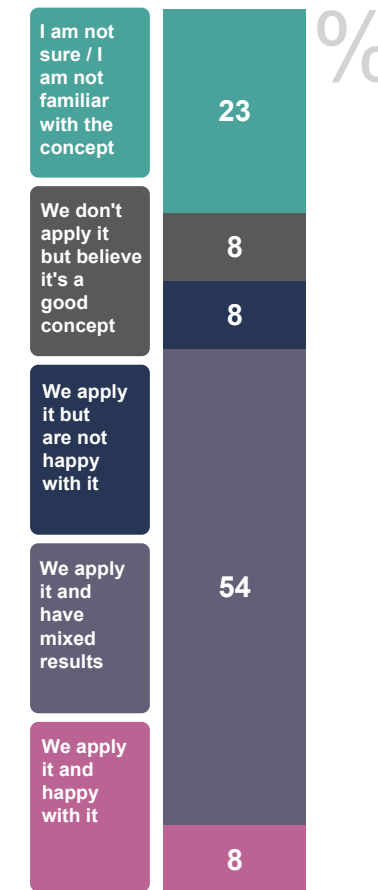
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

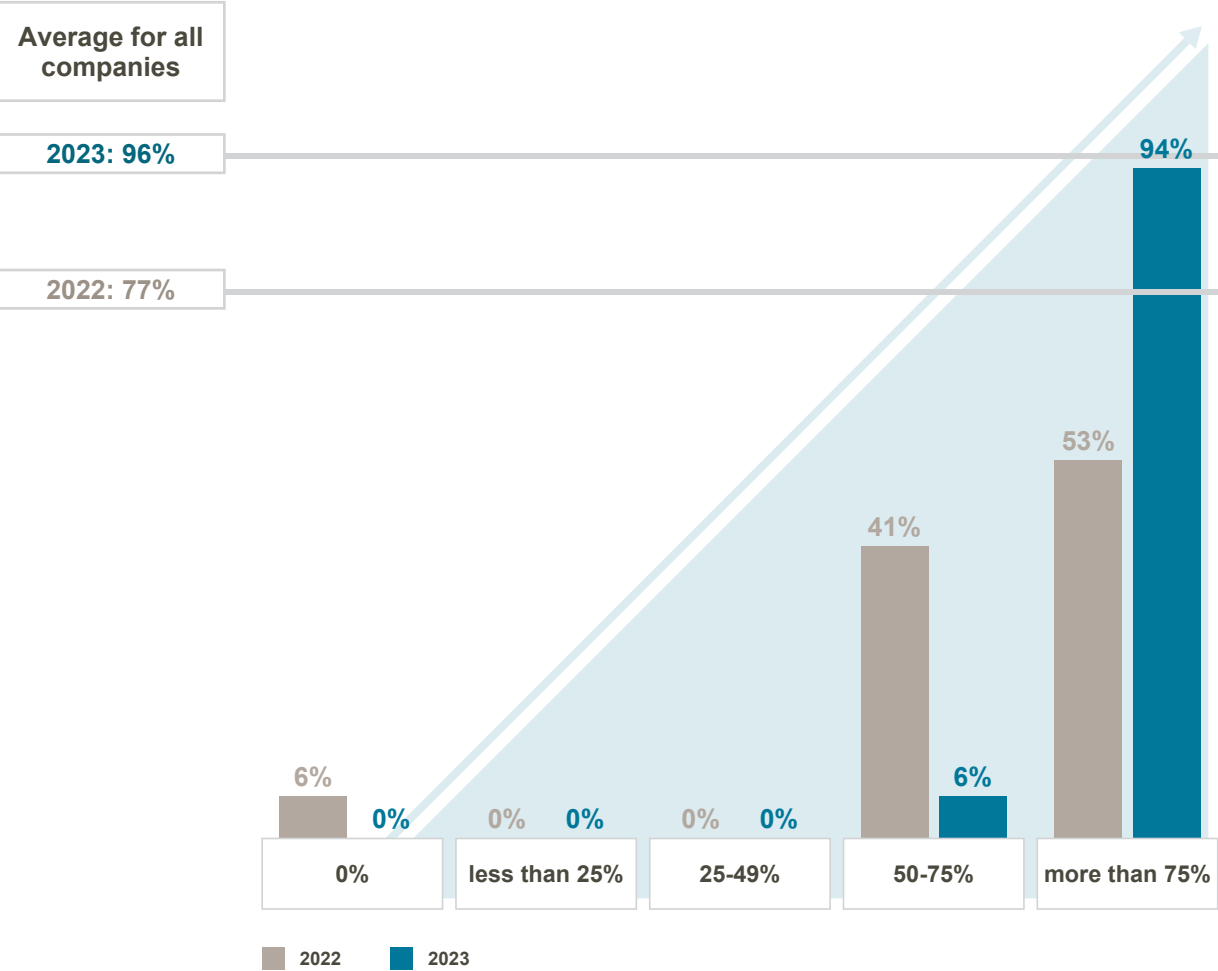


For organisers only (13 answers in total)

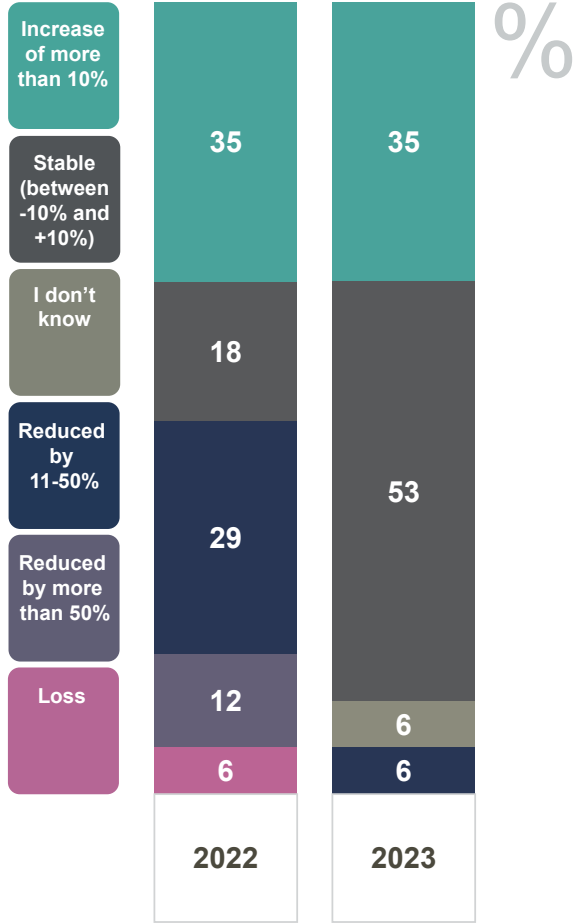
Detailed results for Greece



Revenue compared to 2019



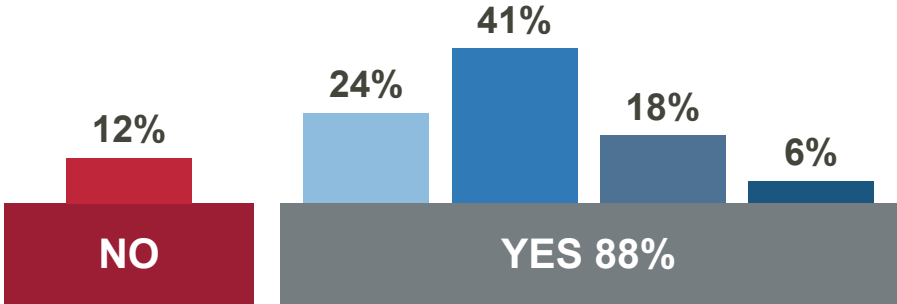
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

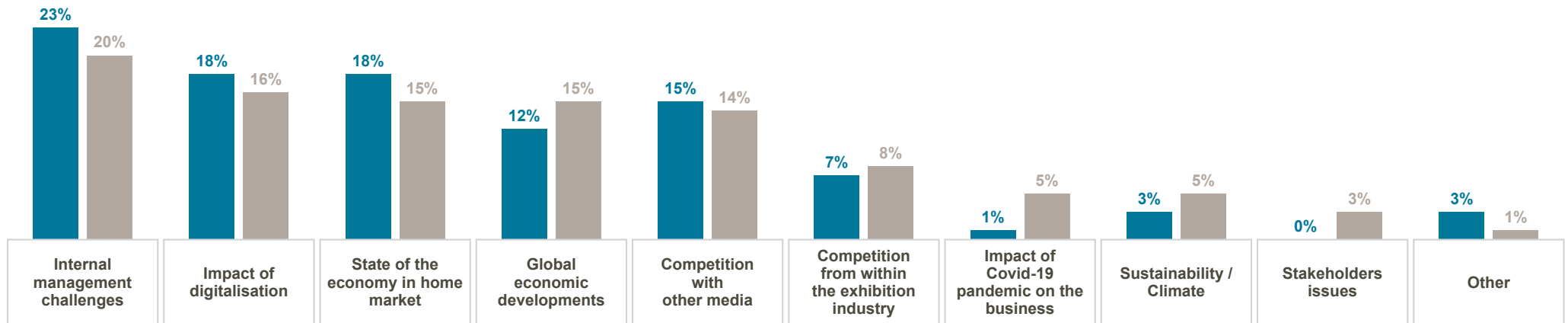


Detailed results for Greece



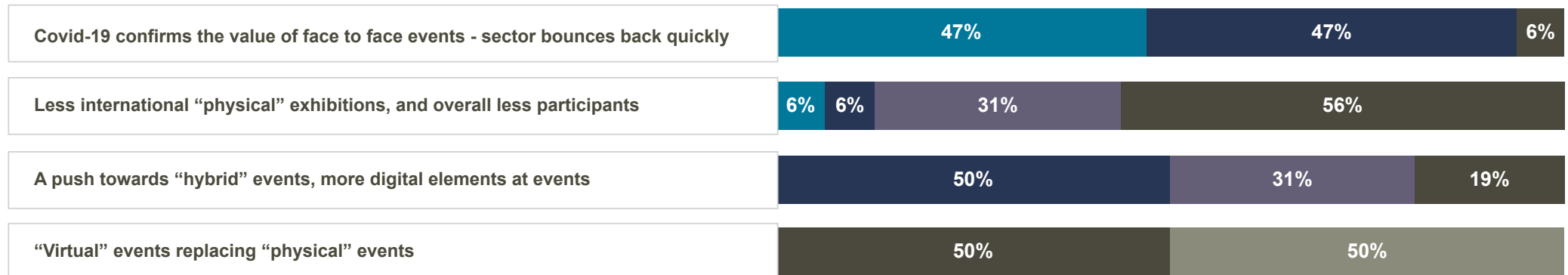
Most important business issues in the exhibition industry

Greece Global



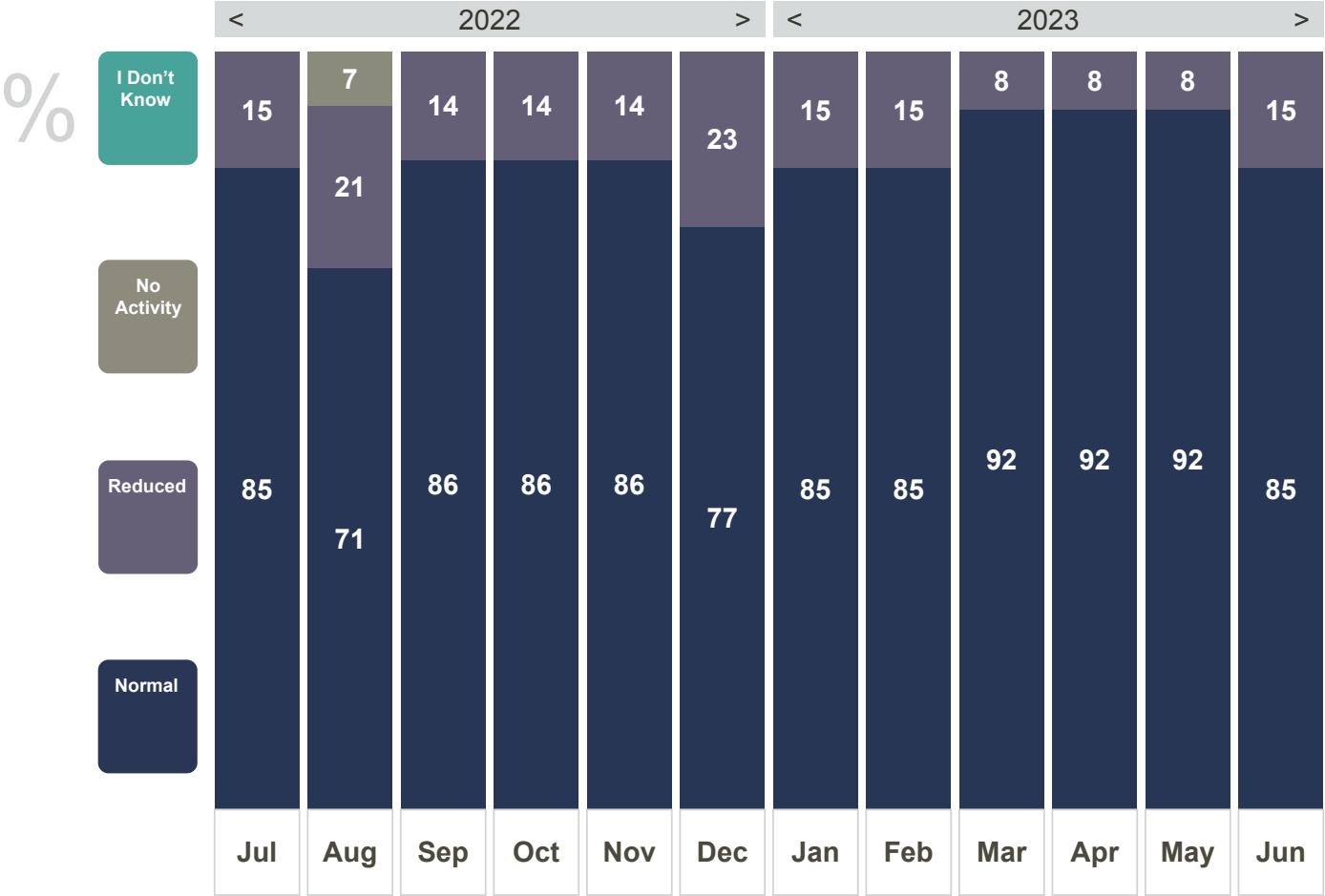
Format of exhibitions in the coming years

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

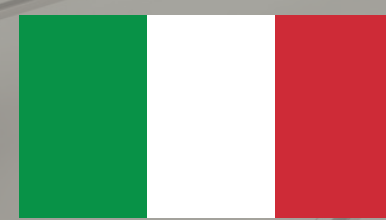




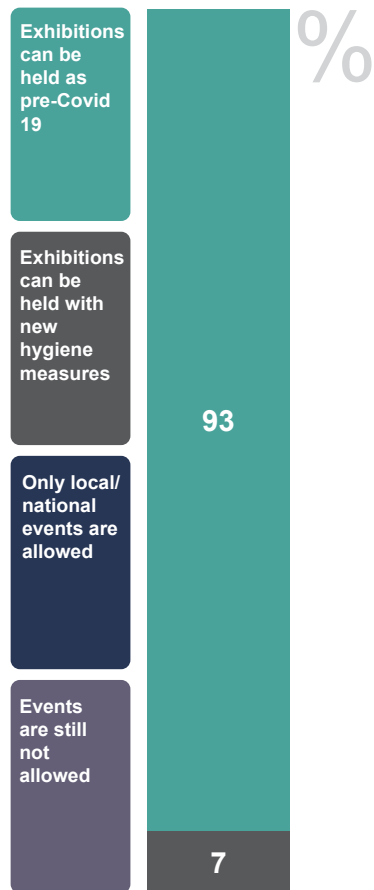
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



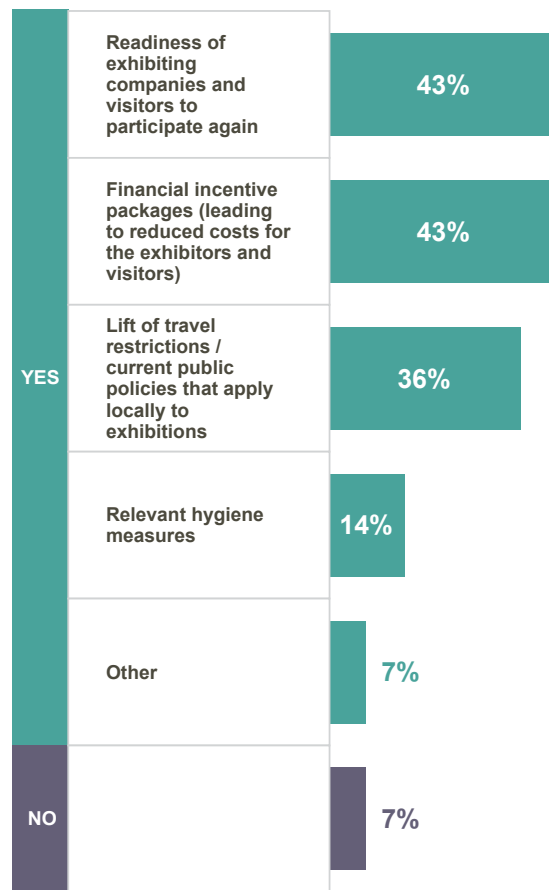
Detailed results for Italy



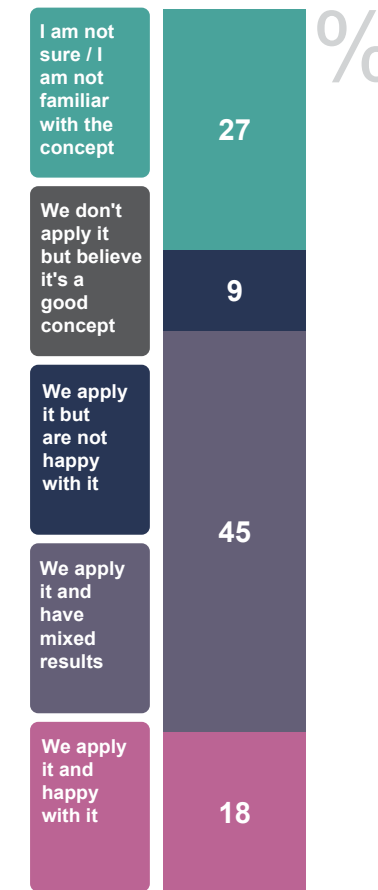
What is the overall status of operations in your city?



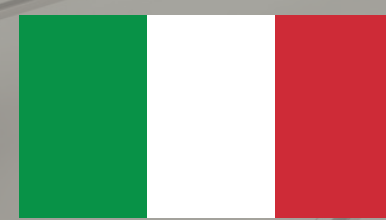
Do you believe specific measures need to be implemented to help the recovery of exhibitions?



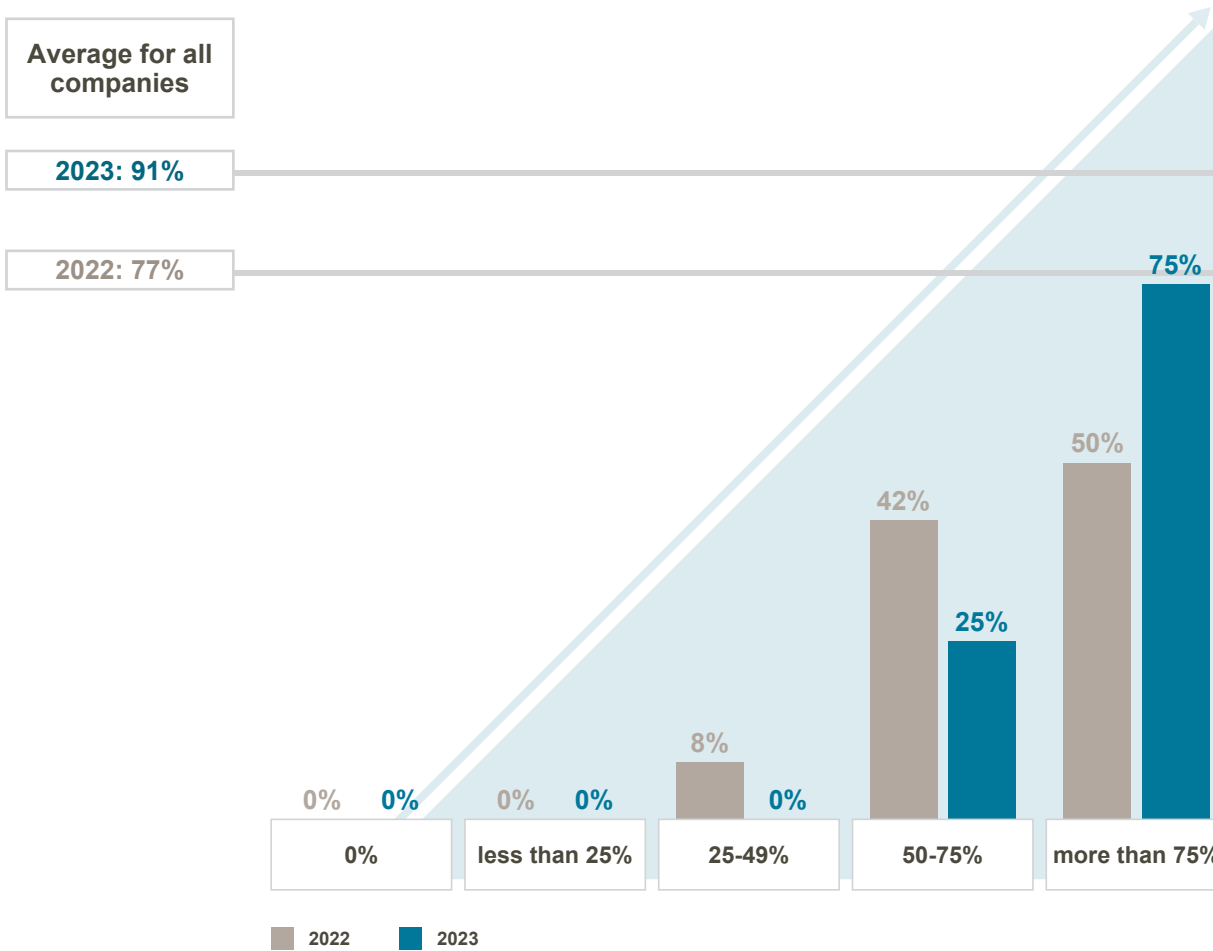
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



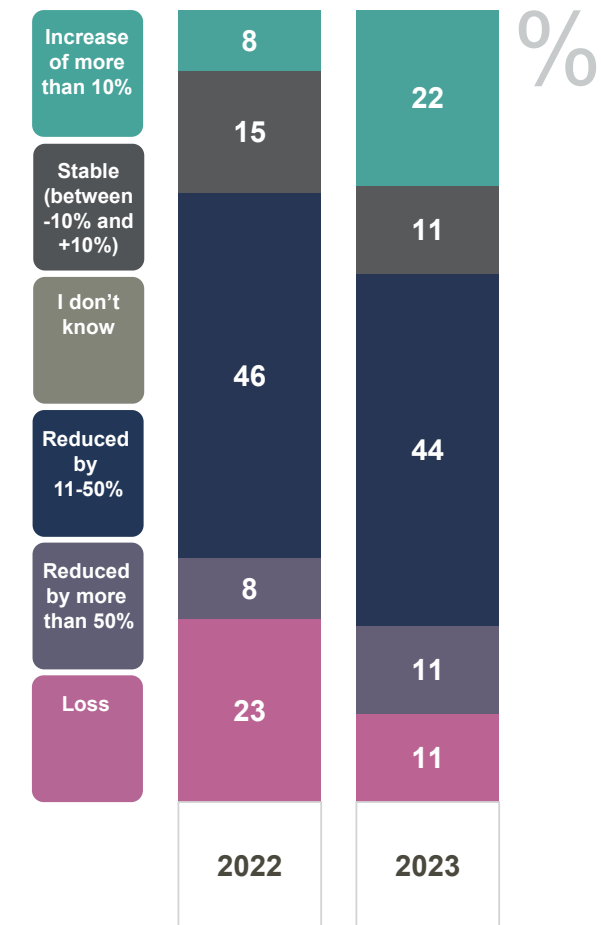
For organisers only (11 answers in total)



Revenue compared to 2019

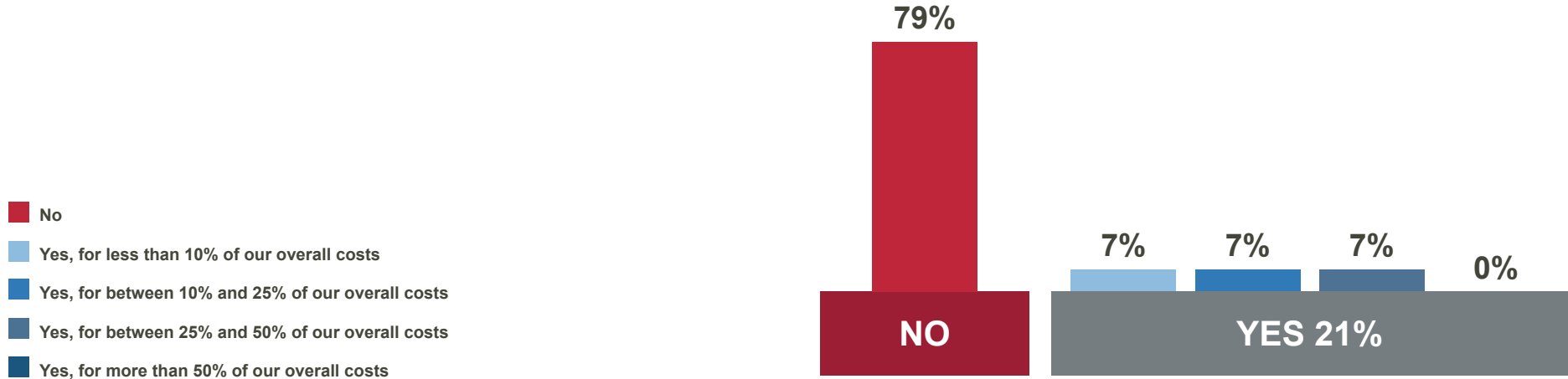


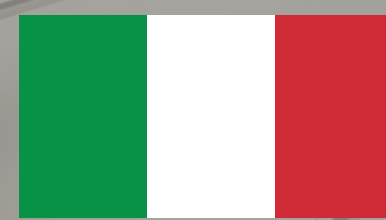
Operating Profits compared to 2019





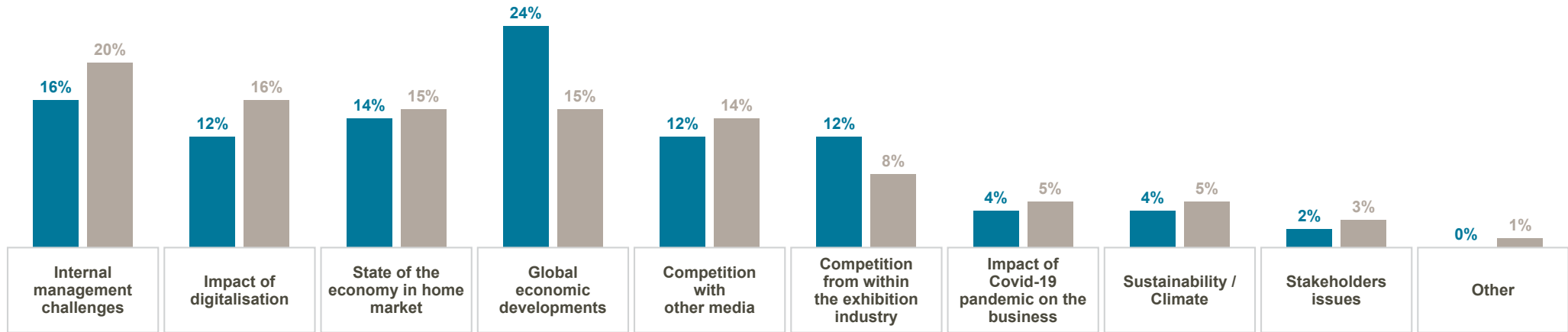
Did your company benefit from public financial support in 2022?





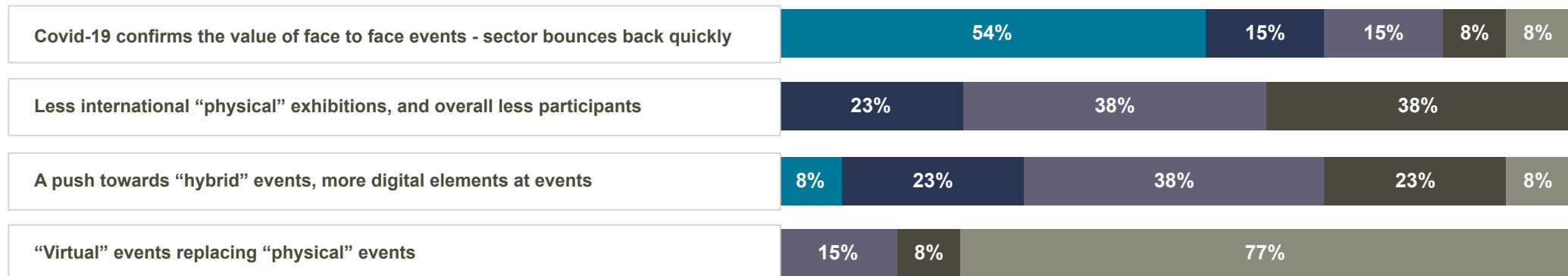
Most important business issues in the exhibition industry

Italy Global



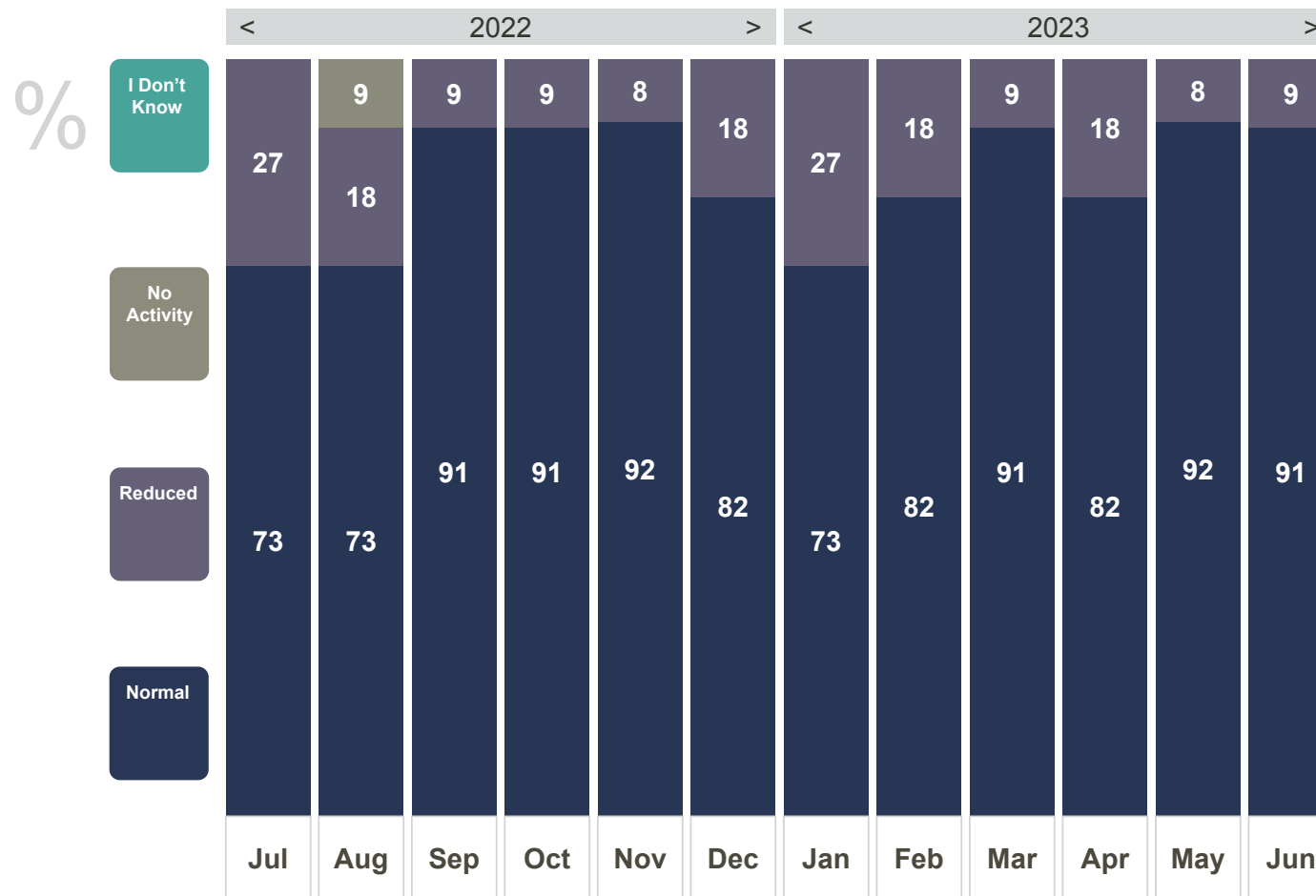
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



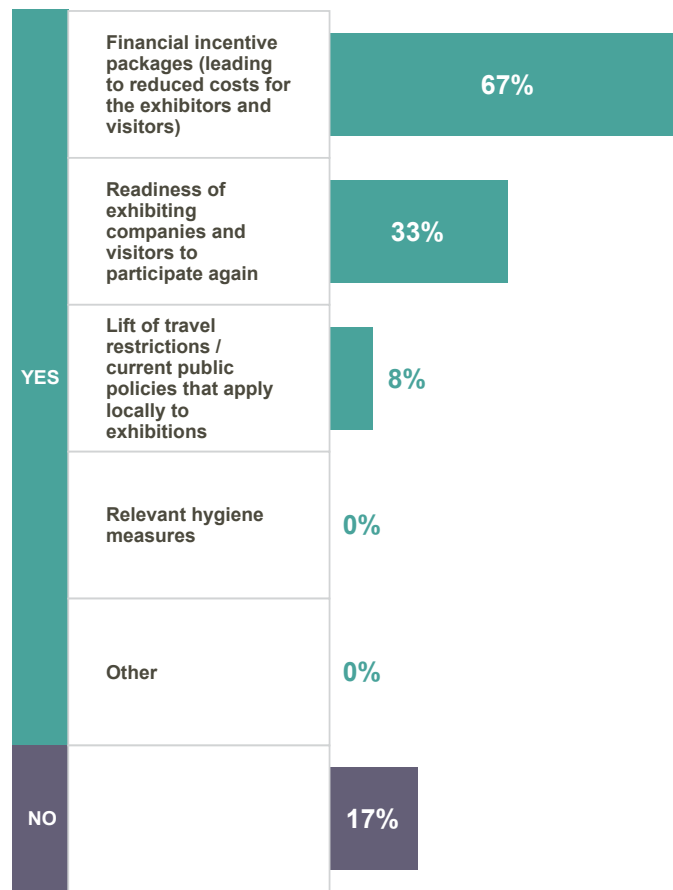
Detailed results for Spain



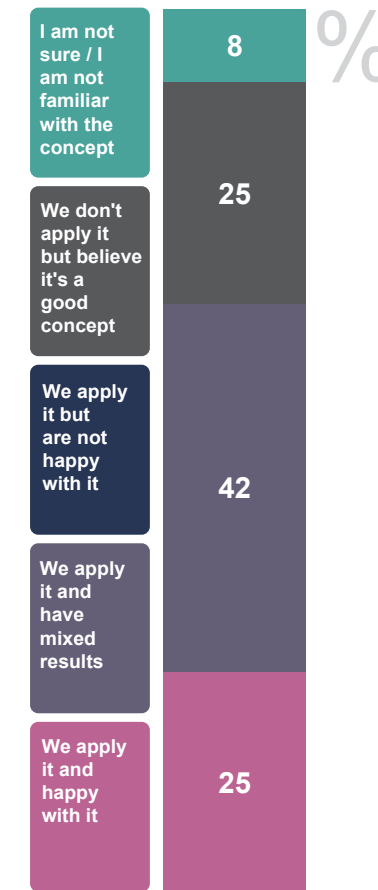
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



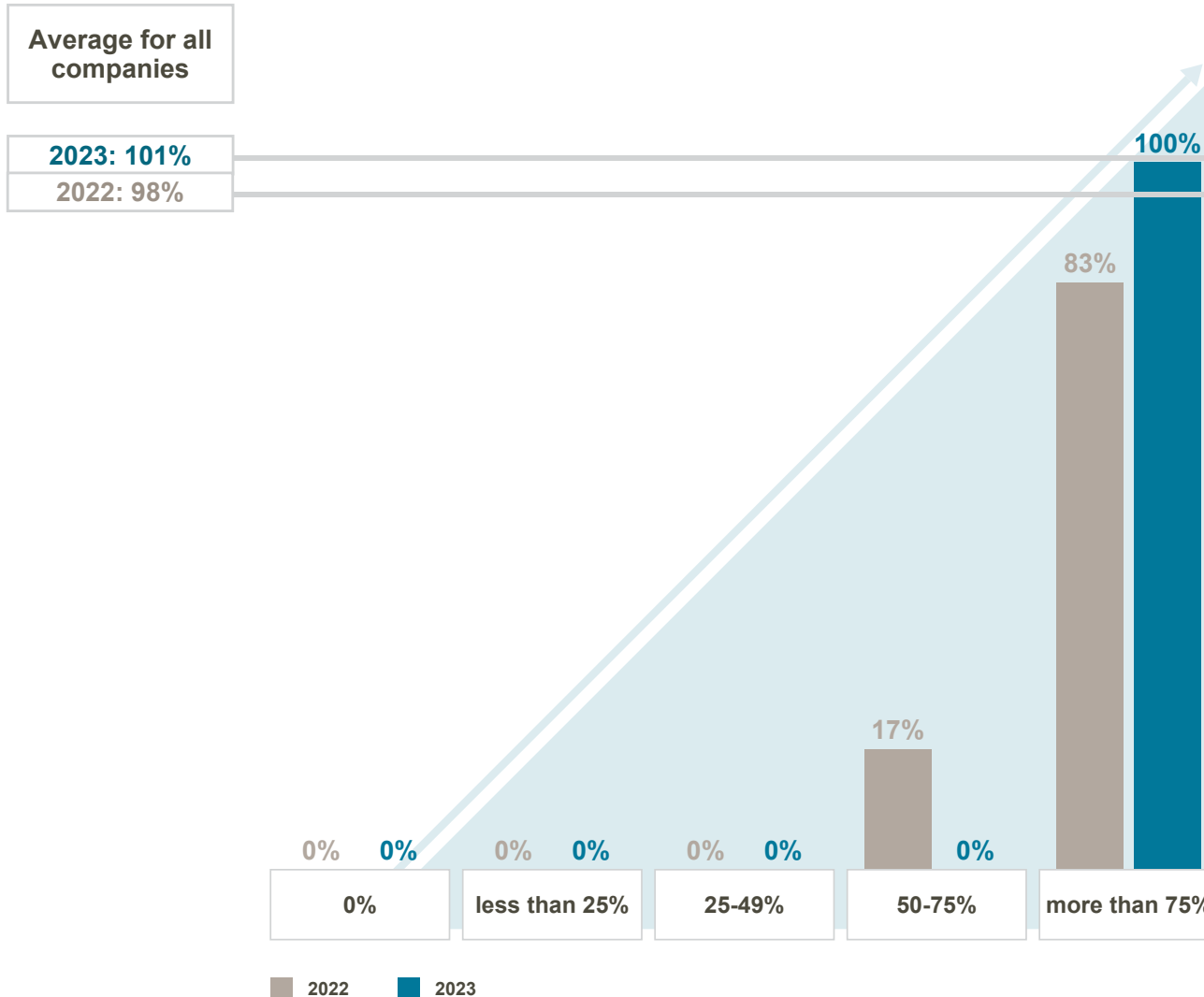
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



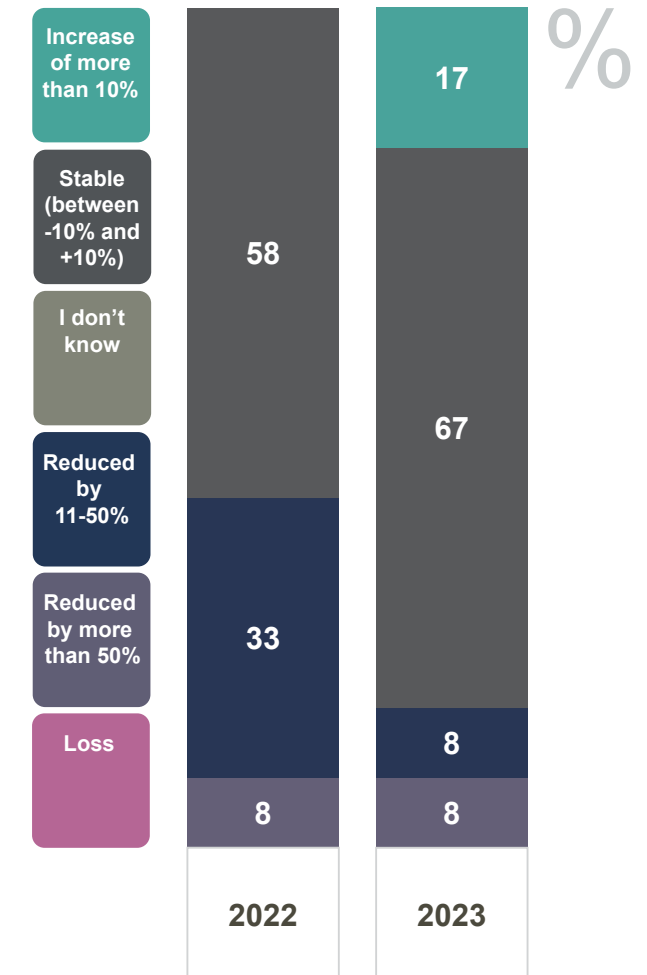
For organisers only (12 answers in total)



Revenue compared to 2019



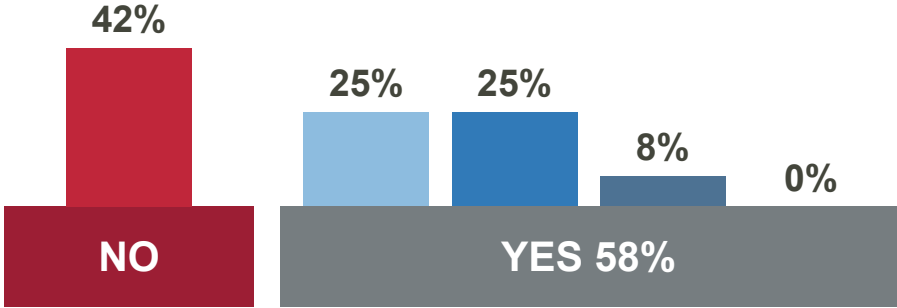
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

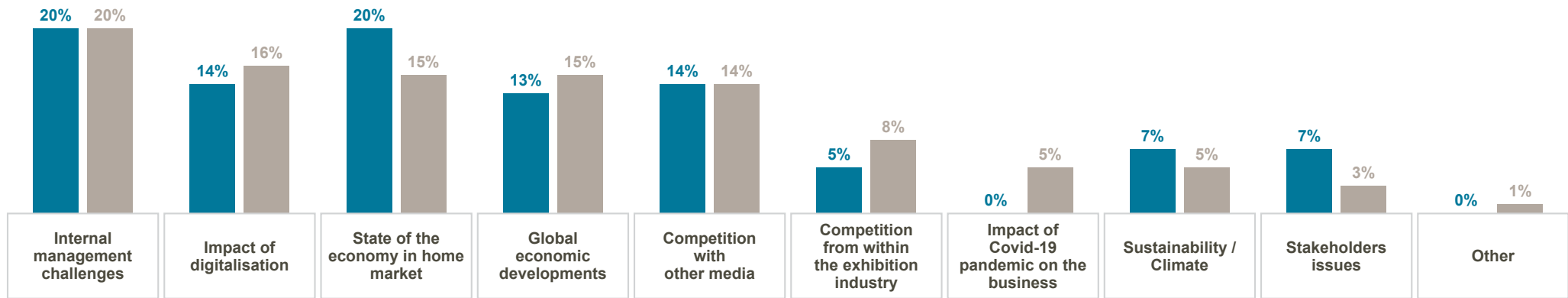
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





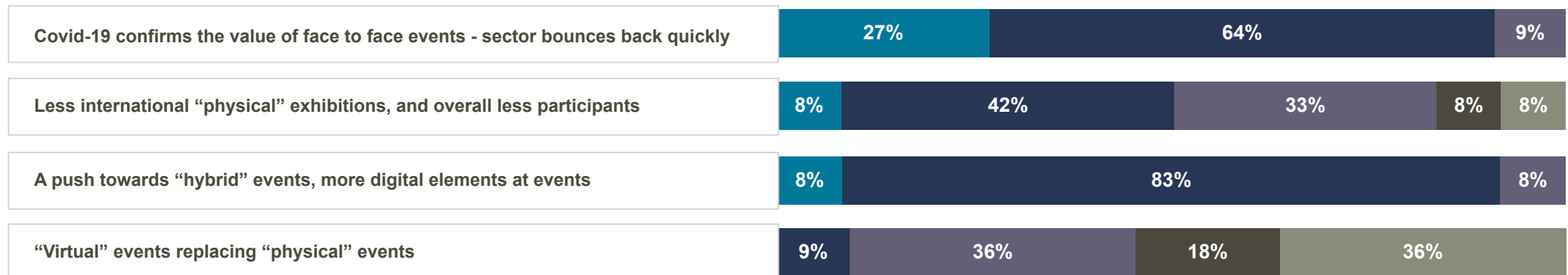
Most important business issues in the exhibition industry

Spain Global



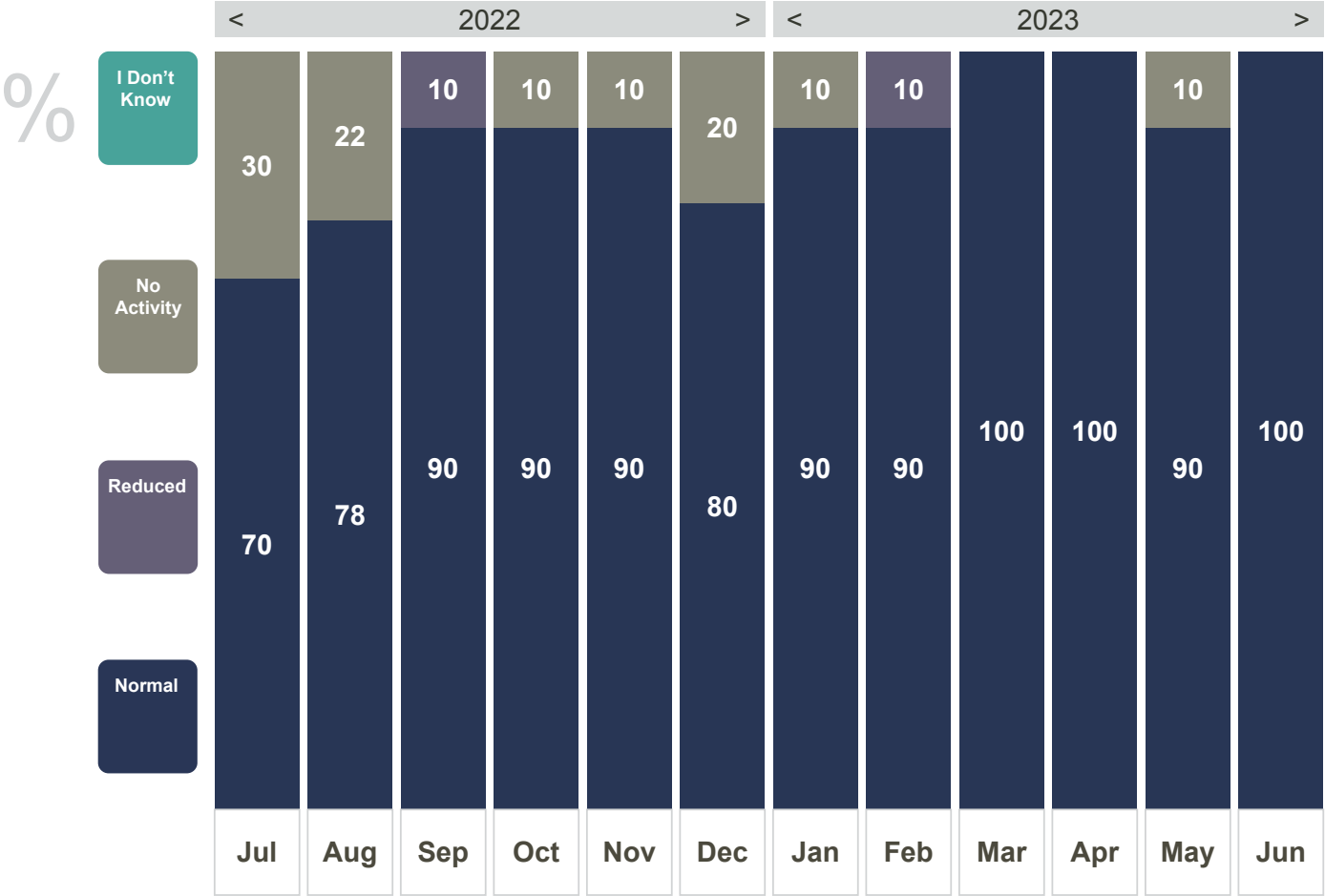
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



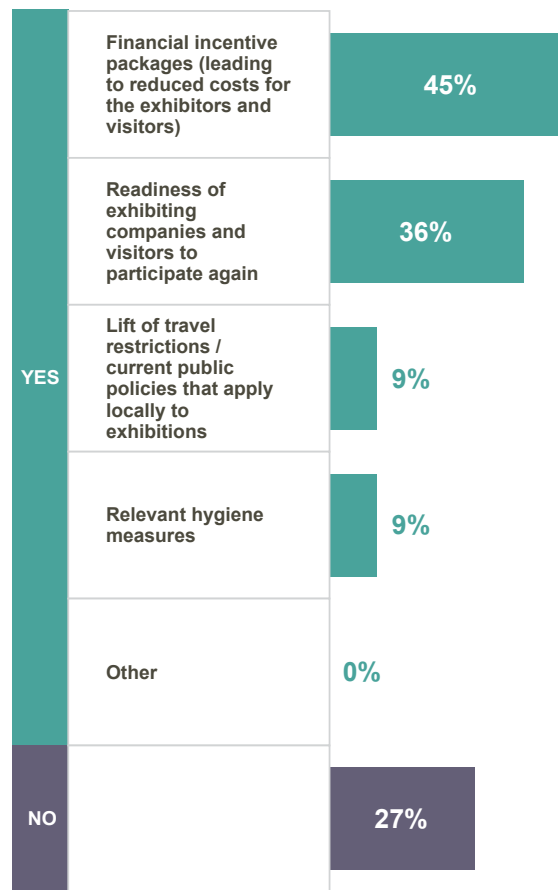
Detailed results for Turkey



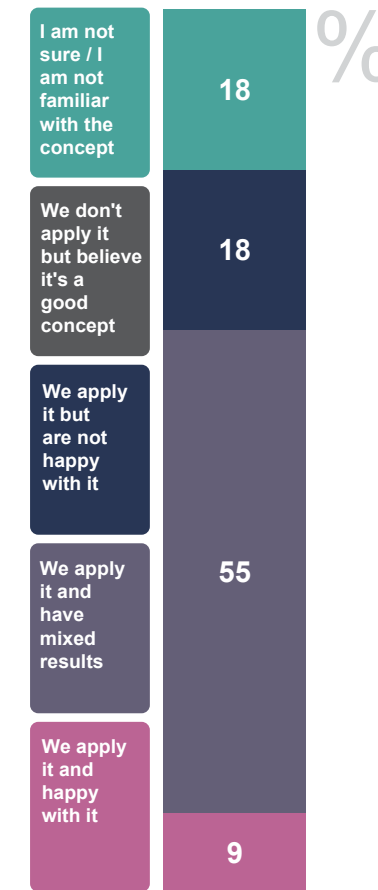
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



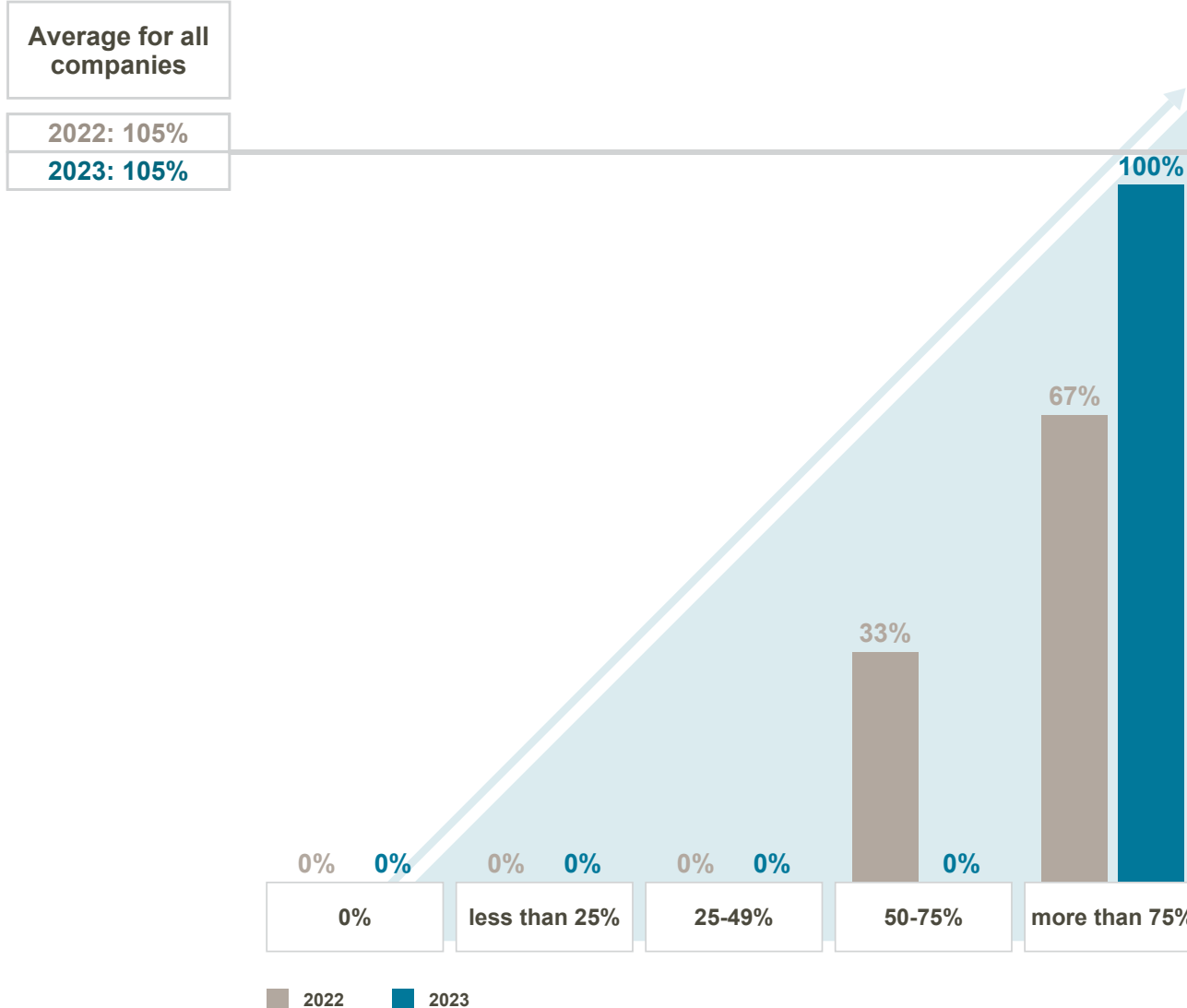
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



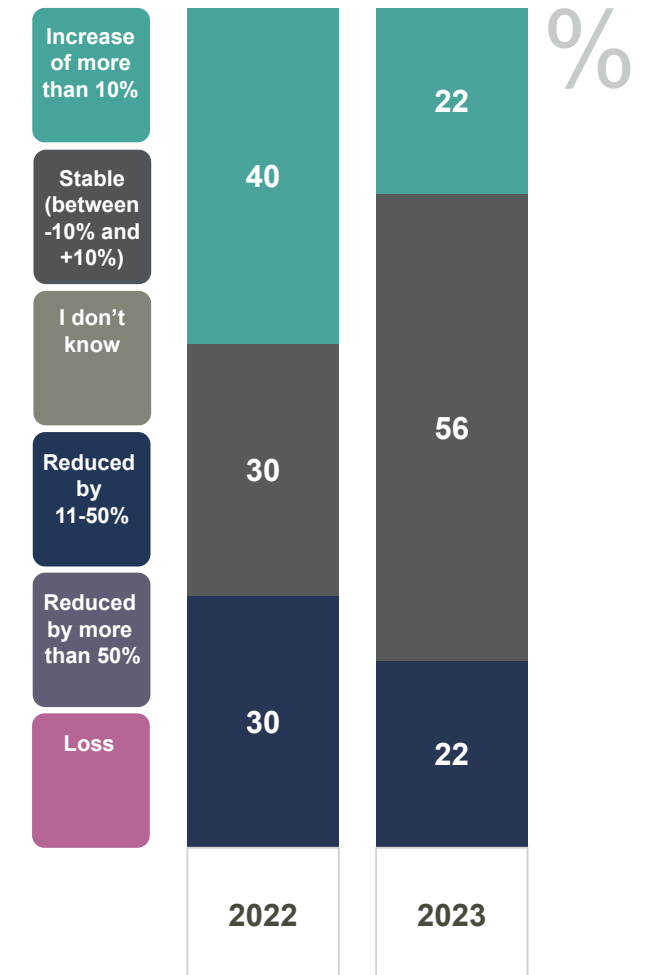
For organisers only (11 answers in total)



Revenue compared to 2019

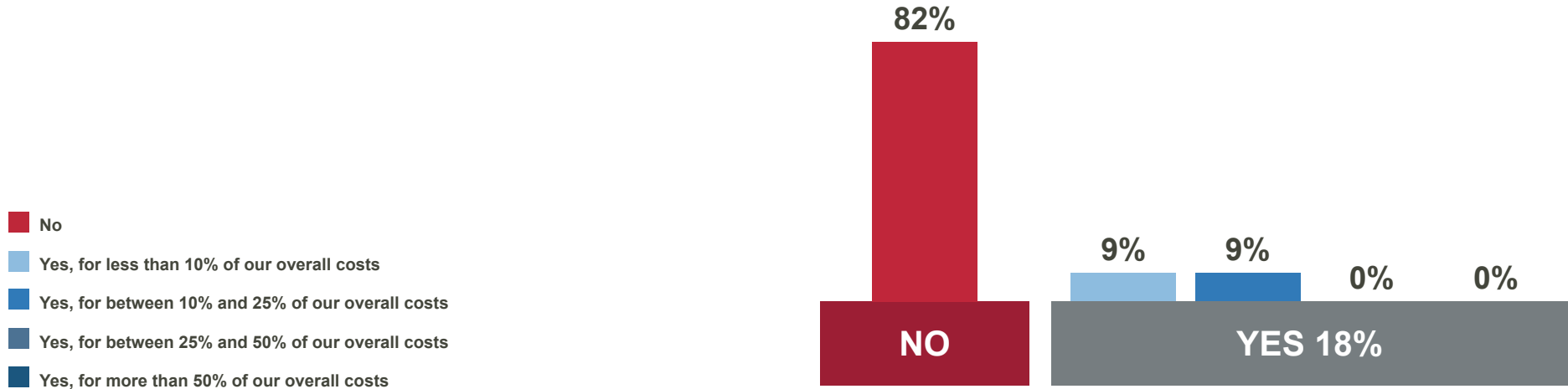


Operating Profits compared to 2019





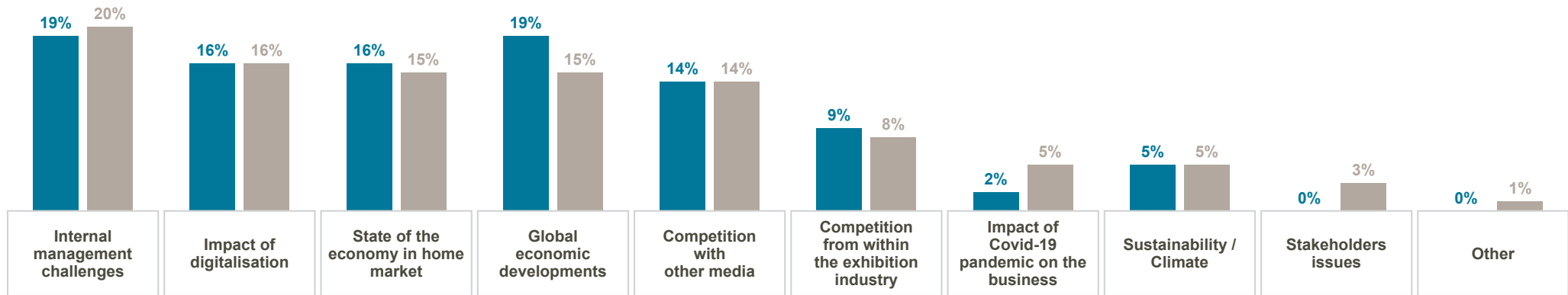
Did your company benefit from public financial support in 2022?





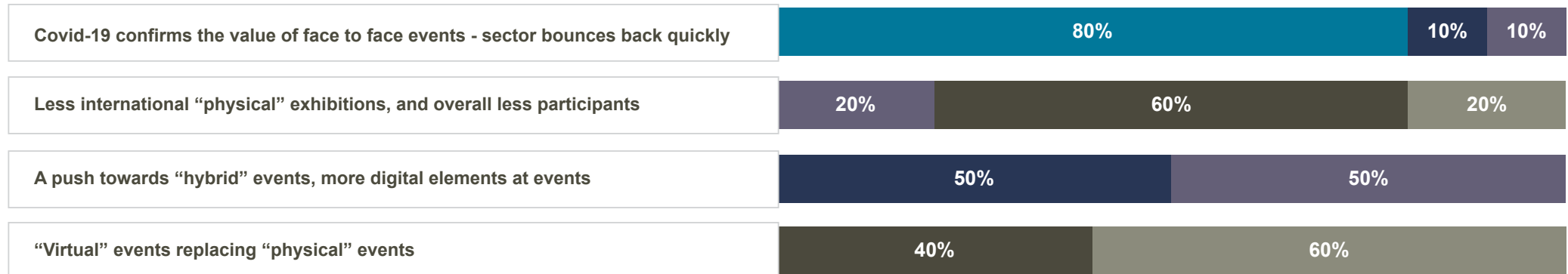
Most important business issues in the exhibition industry

Turkey Global



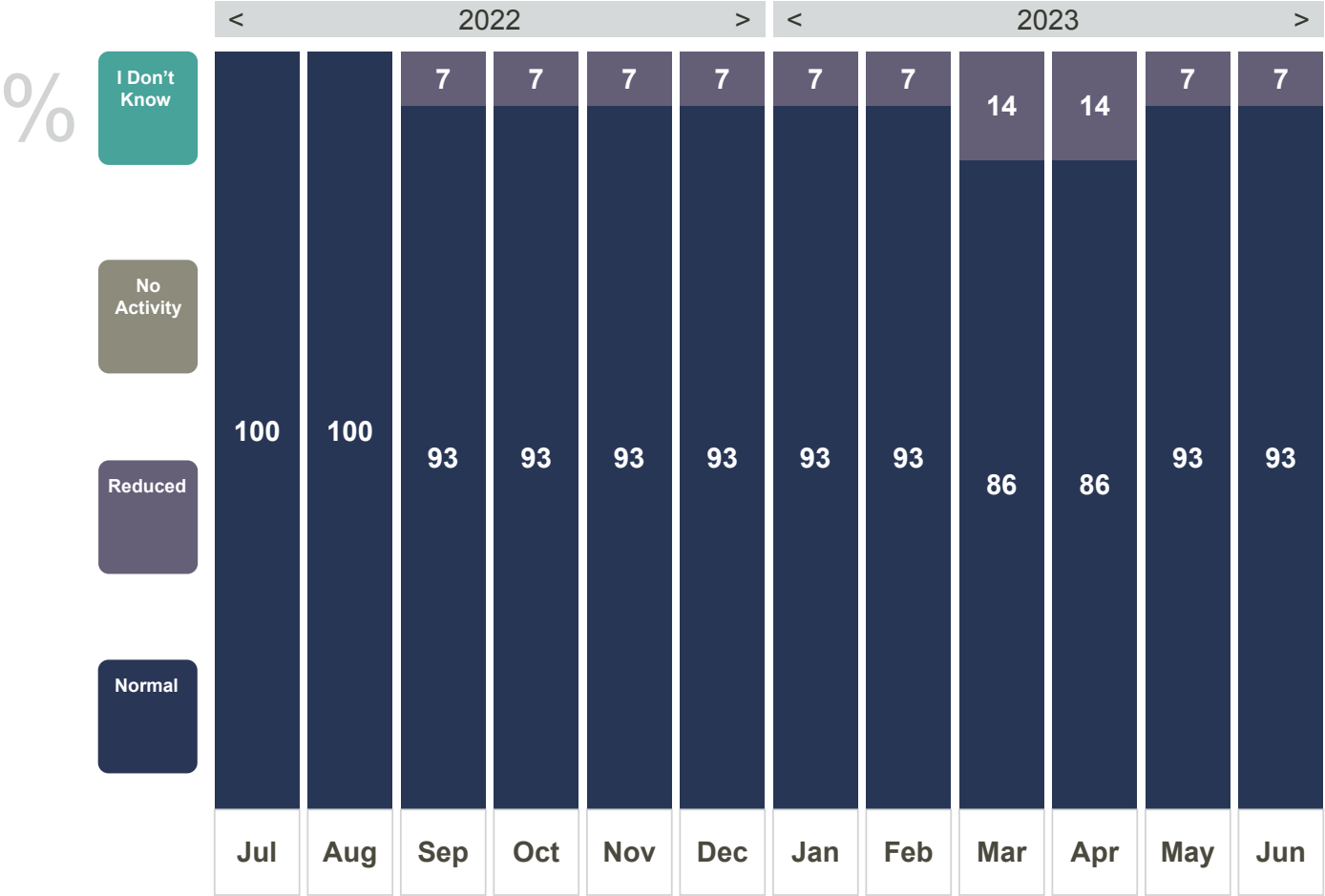
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023

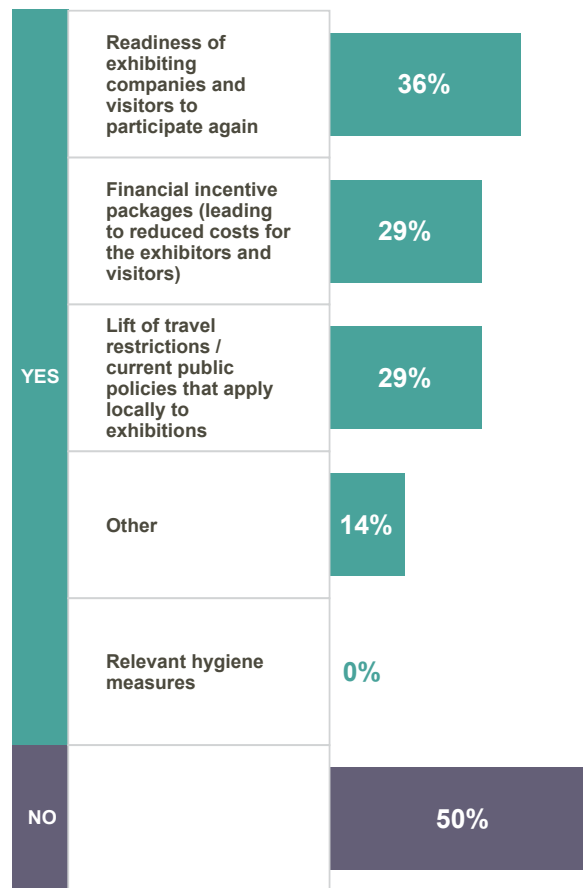




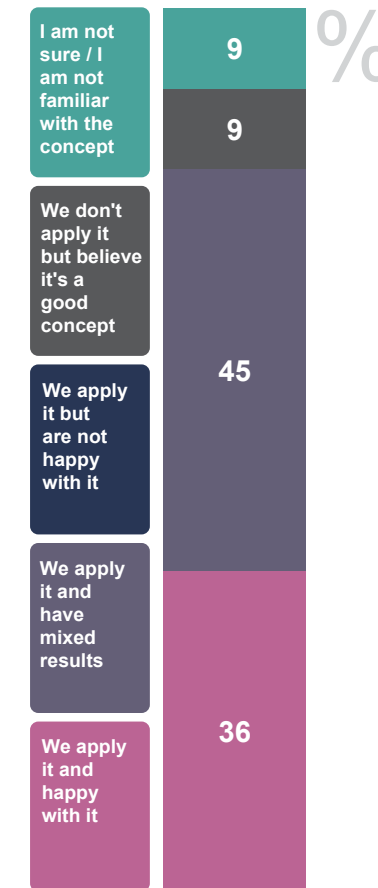
What is the overall status of operations in your city?

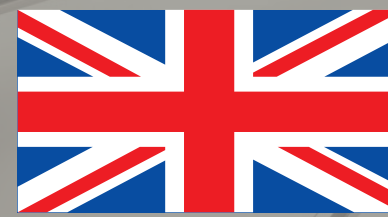


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

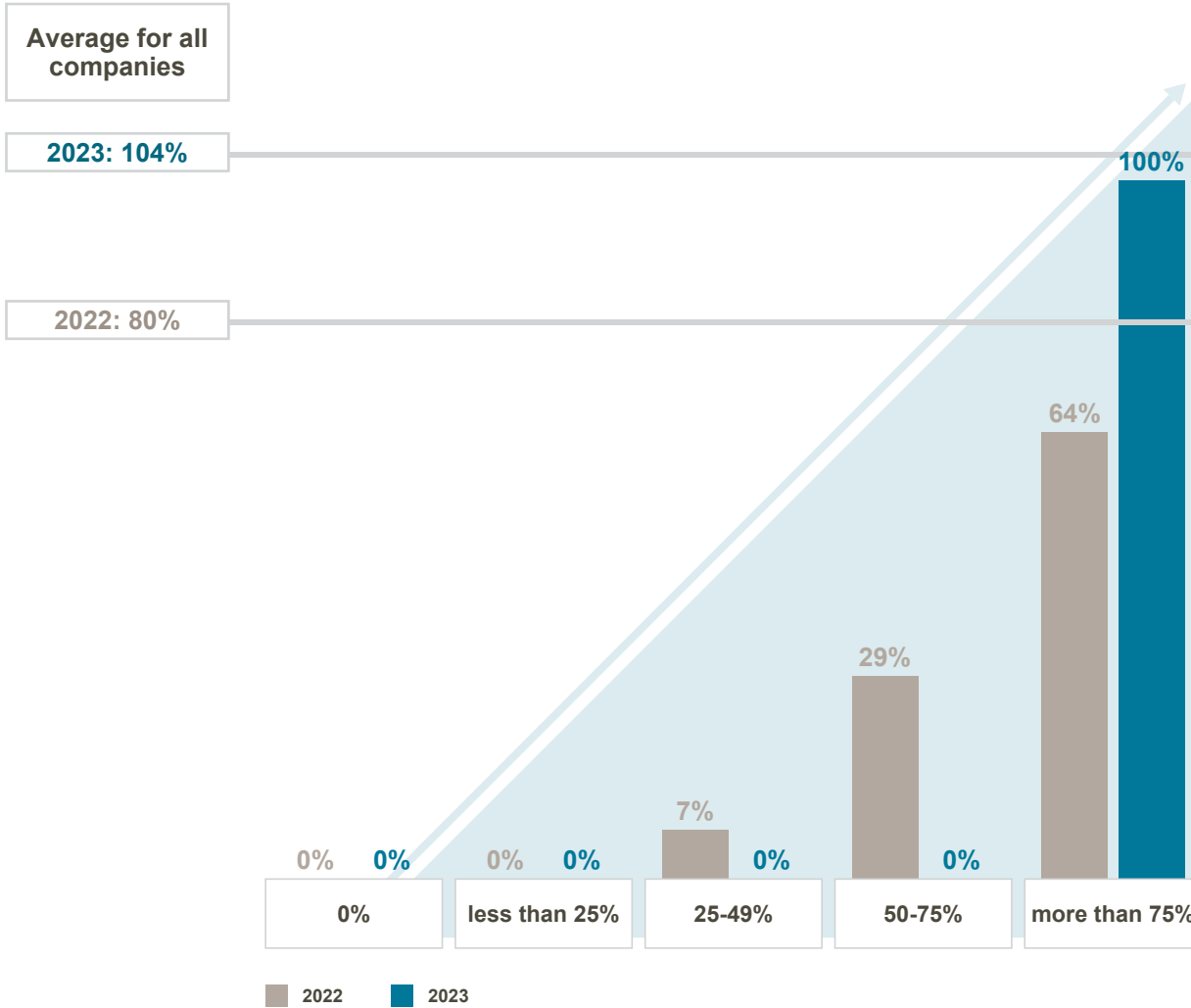


How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

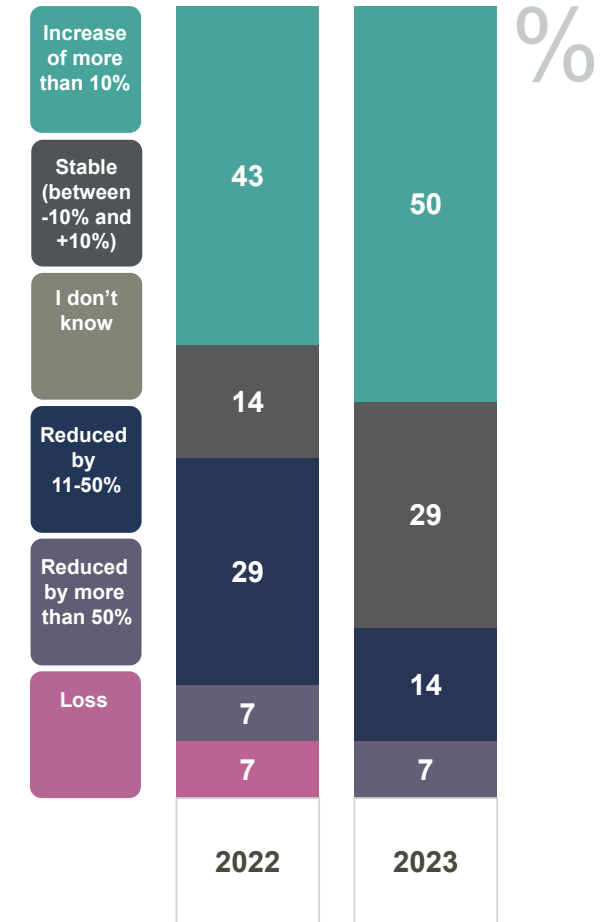




Revenue compared to 2019

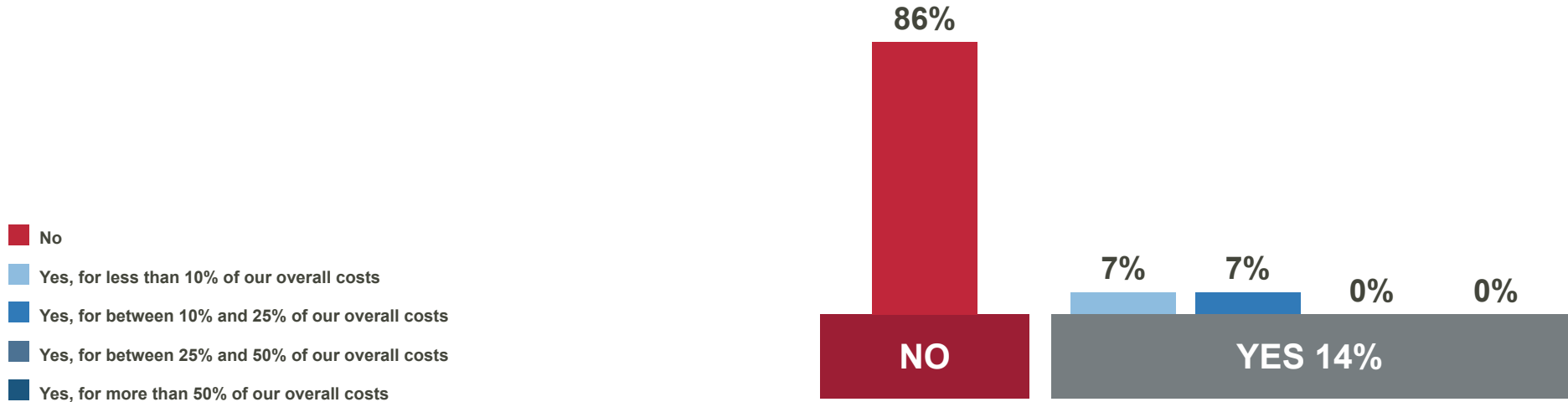


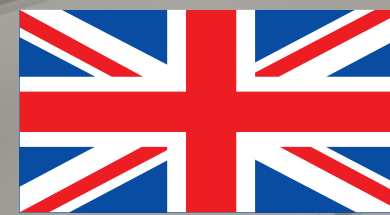
Operating Profits compared to 2019





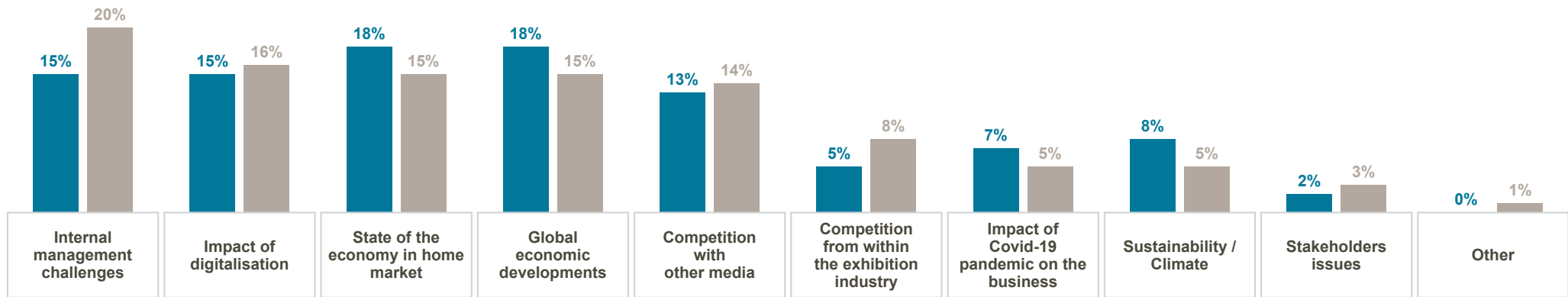
Did your company benefit from public financial support in 2022?





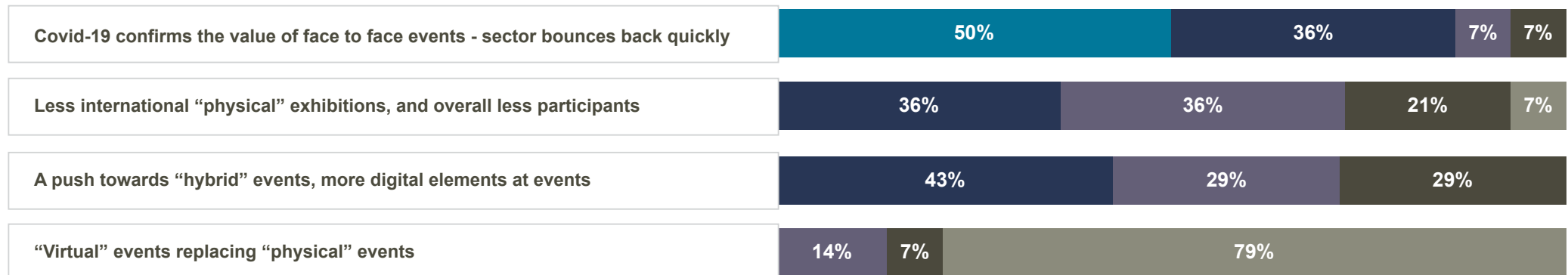
Most important business issues in the exhibition industry

UK Global



Format of exhibitions in the coming years

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



Middle East & Africa

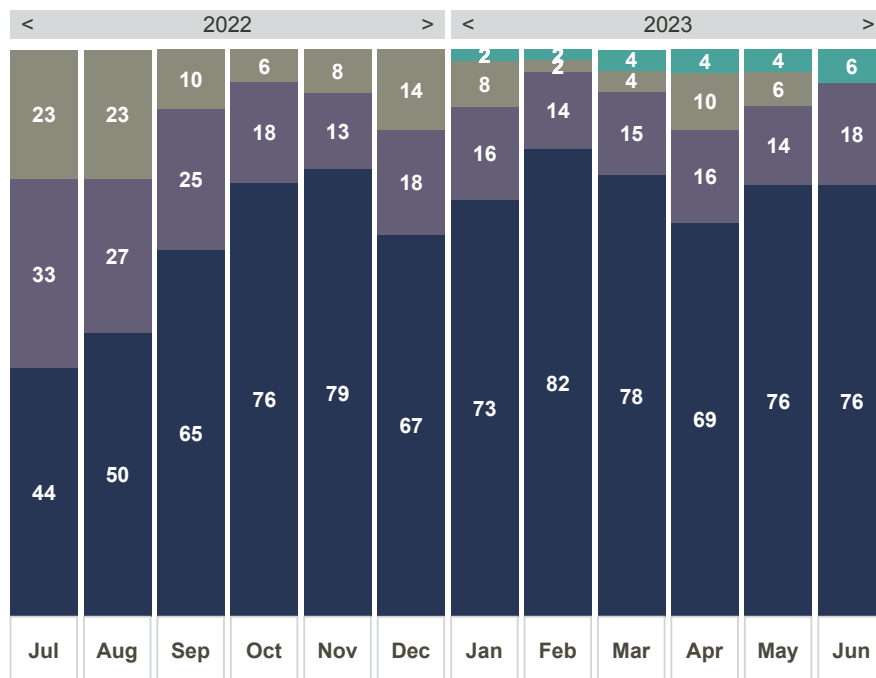




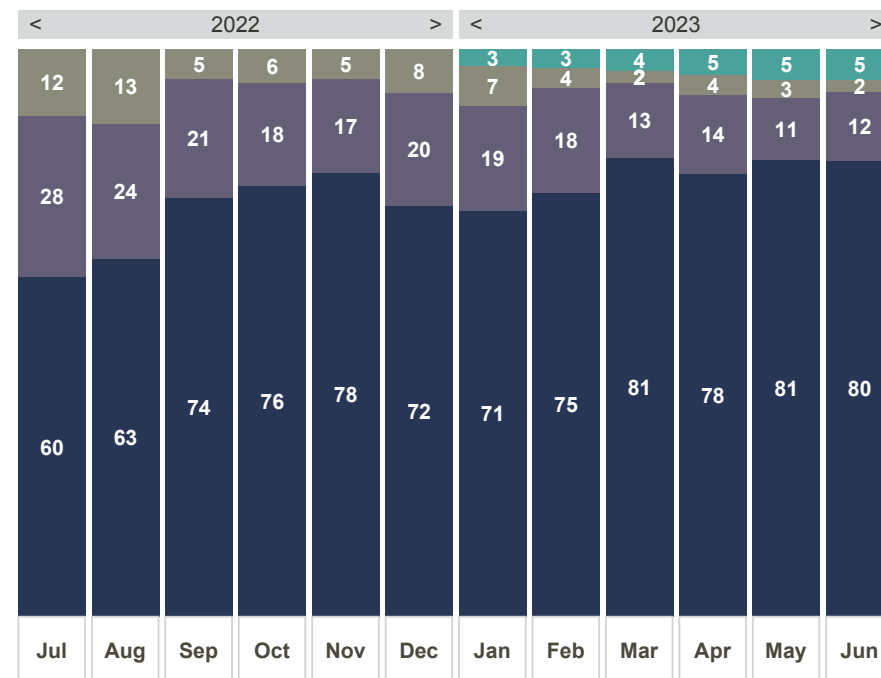
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



Middle East & Africa



World

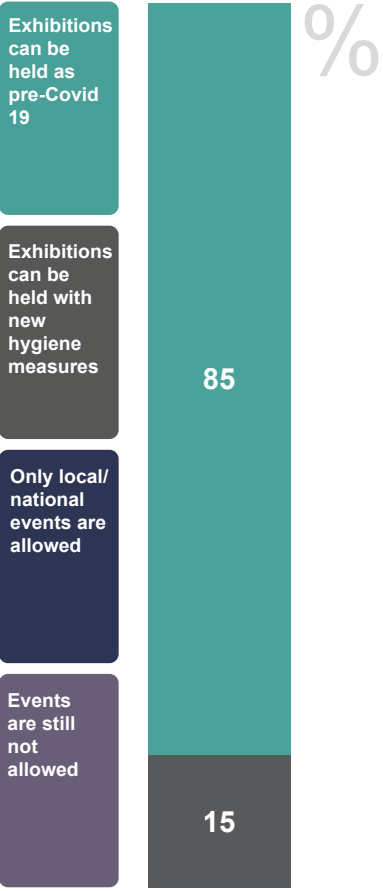


%

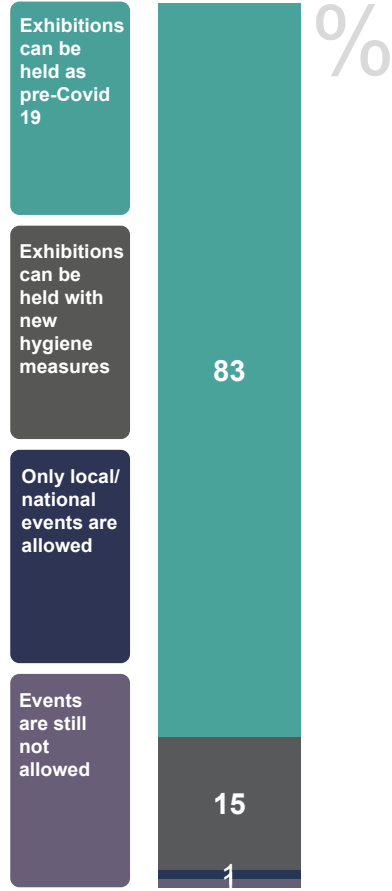


What is the overall status of operations in your city?

Middle East & Africa



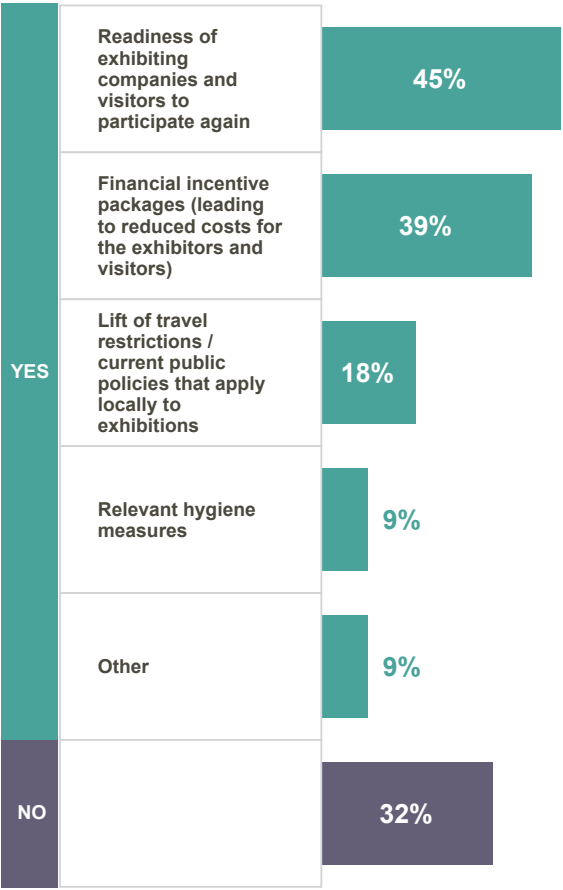
World



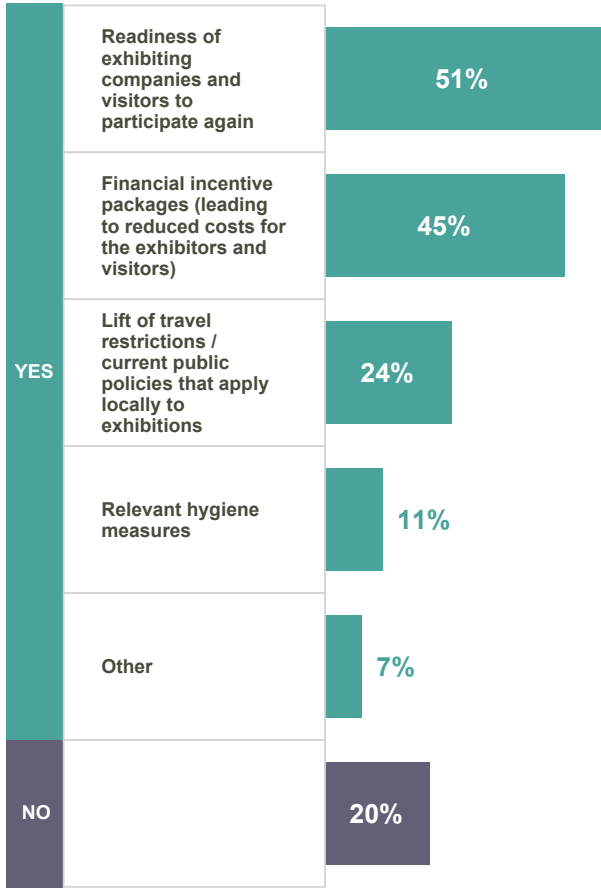


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

Middle East & Africa



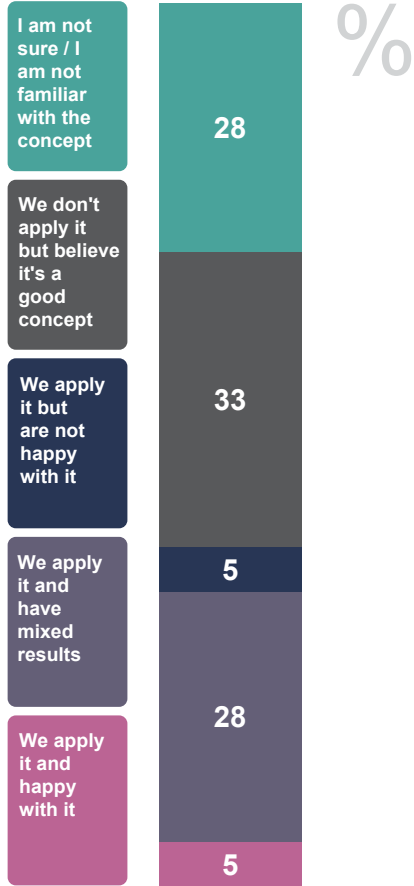
World





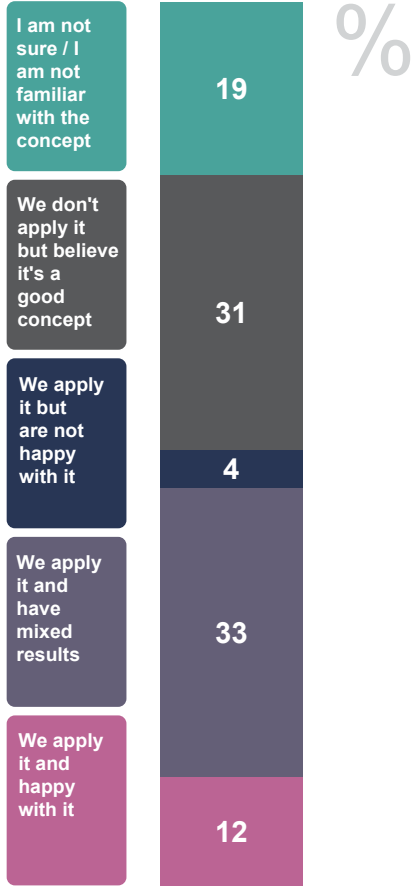
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

Middle East & Africa



For organisers only (39 answers in total)

World

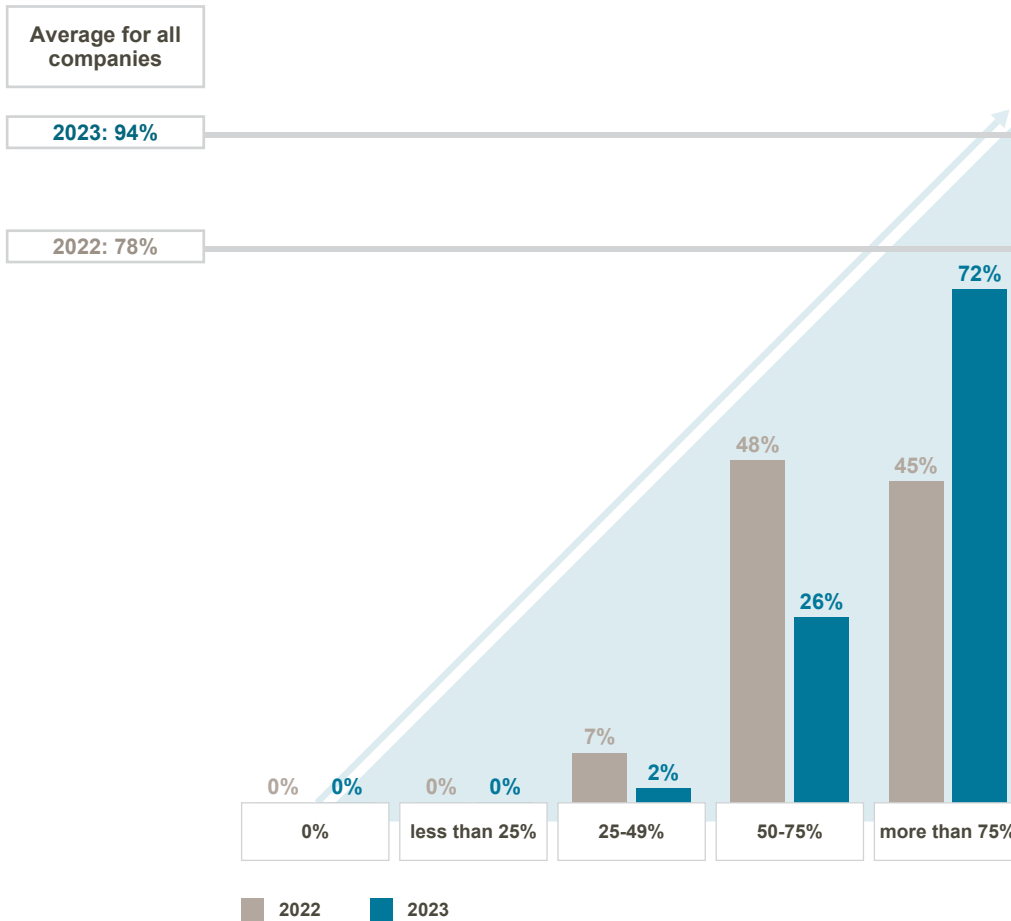


For organisers only (257 answers in total)

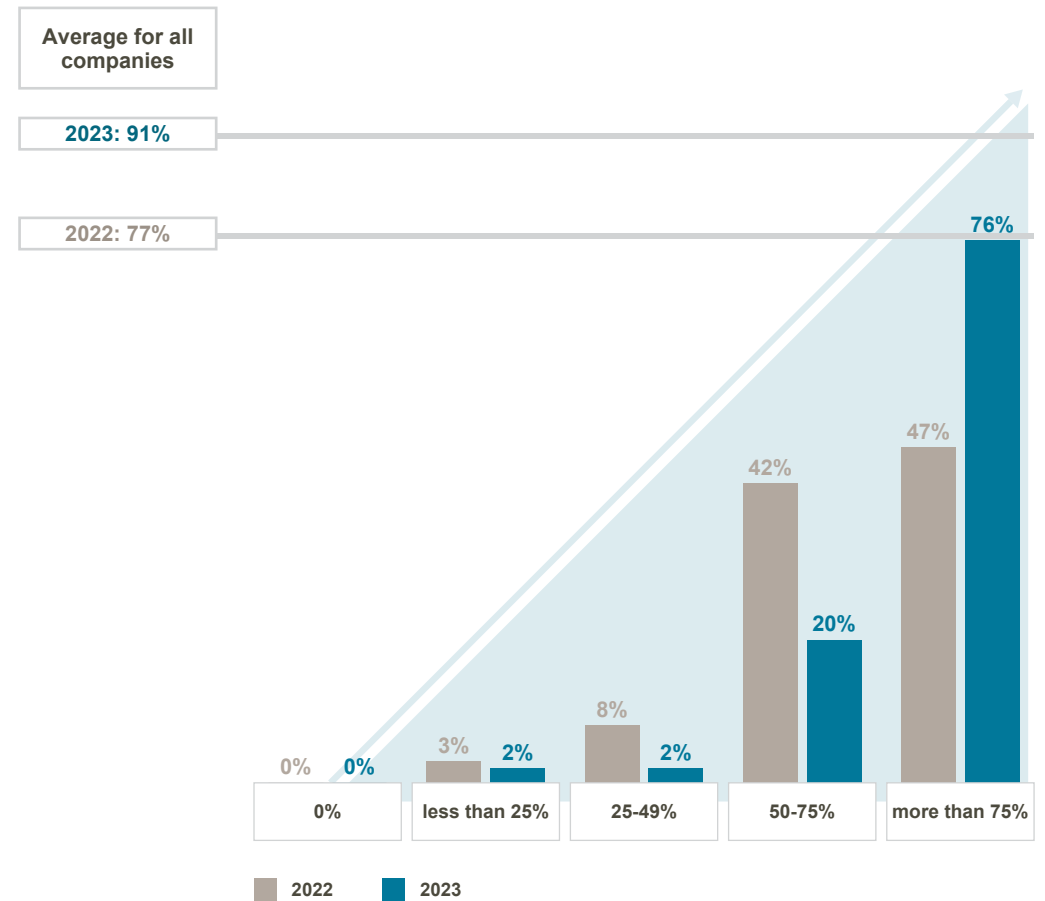


Revenue compared to 2019

Middle East & Africa



World

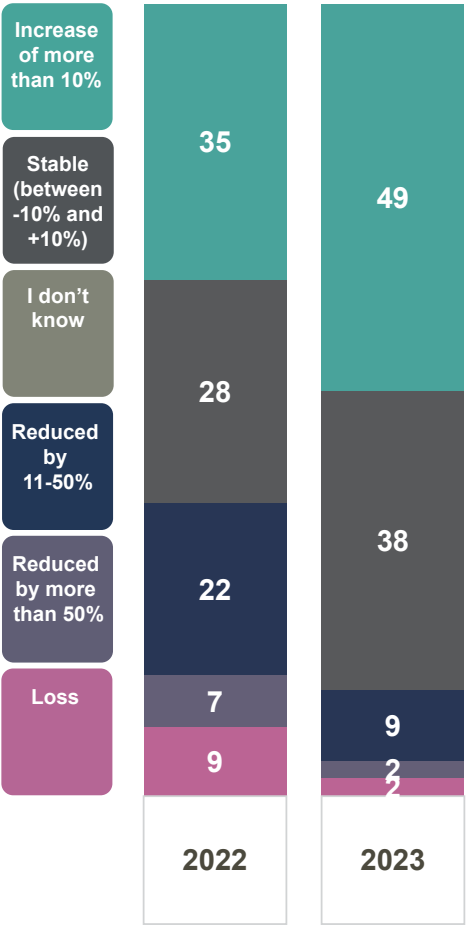


Operating Profits 2022 Middle East & Africa

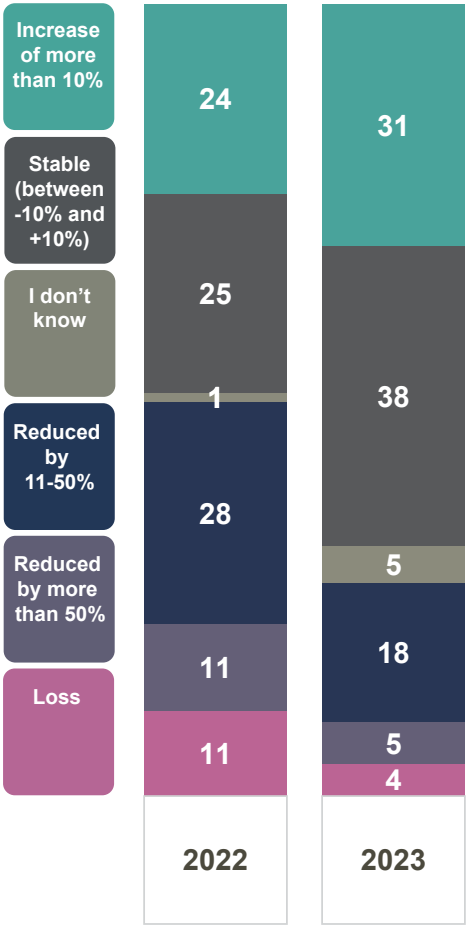


Operating Profits compared to 2019

Middle East & Africa



World

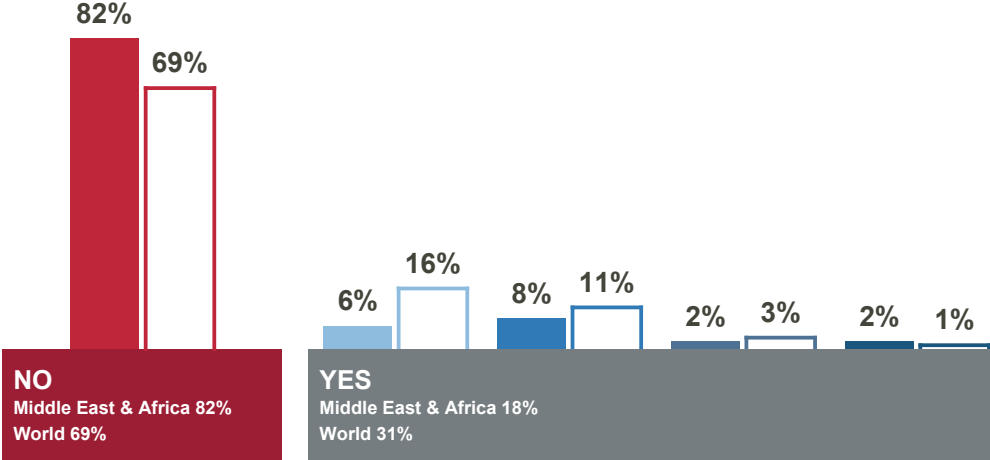




Did your company benefit from public financial support in 2022?

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

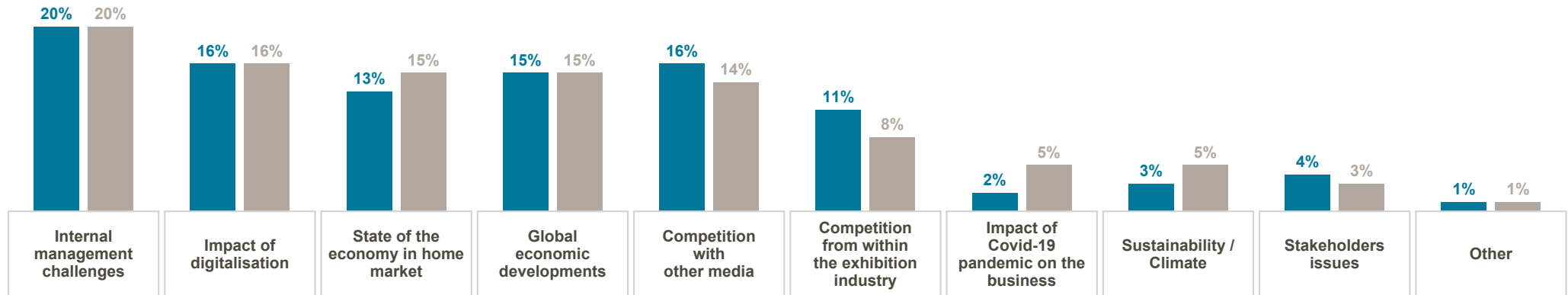


Most Important Business Issues - Format of Exhibitions - Middle East & Africa



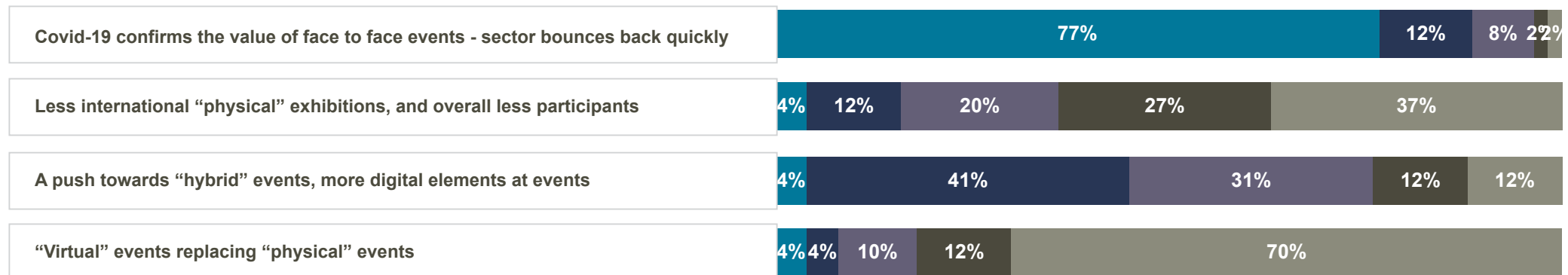
Most important business issues in the exhibition industry

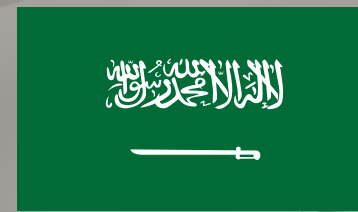
Middle East & Africa Global



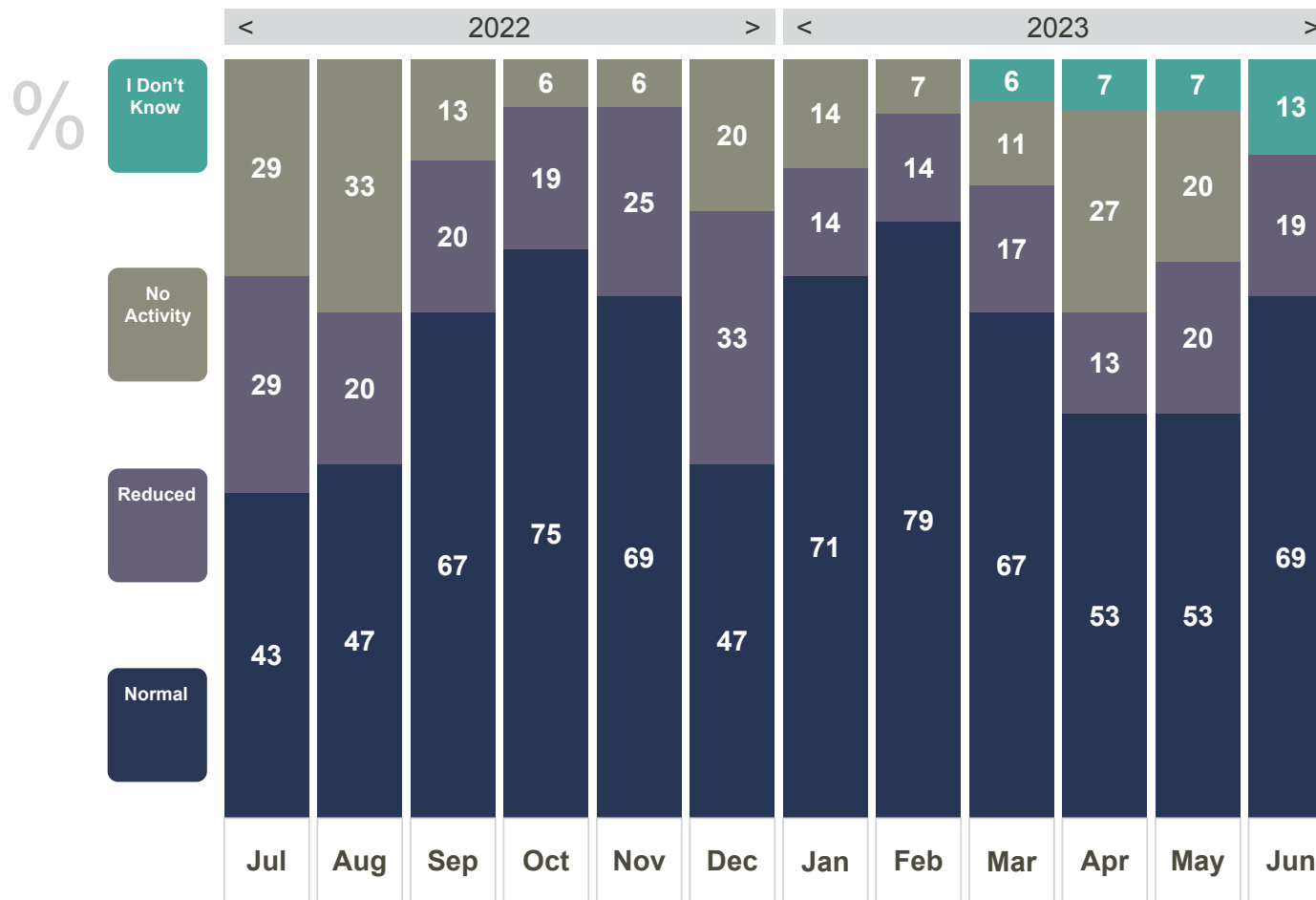
Format of exhibitions in the coming years

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

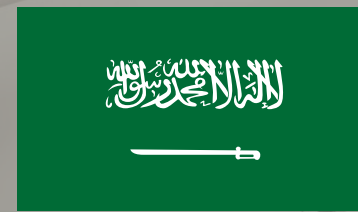




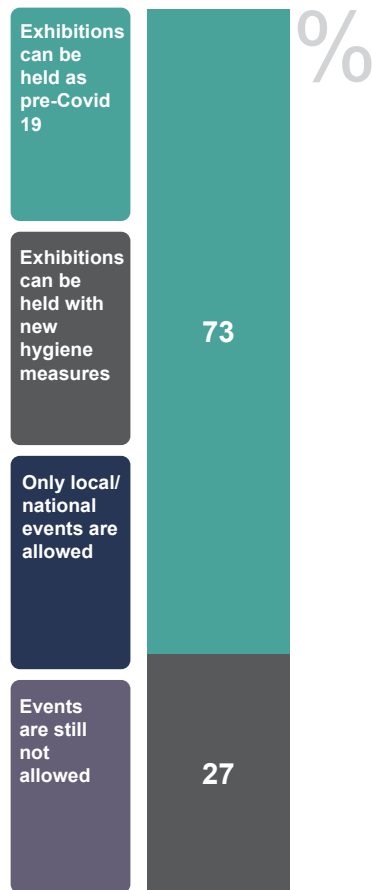
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



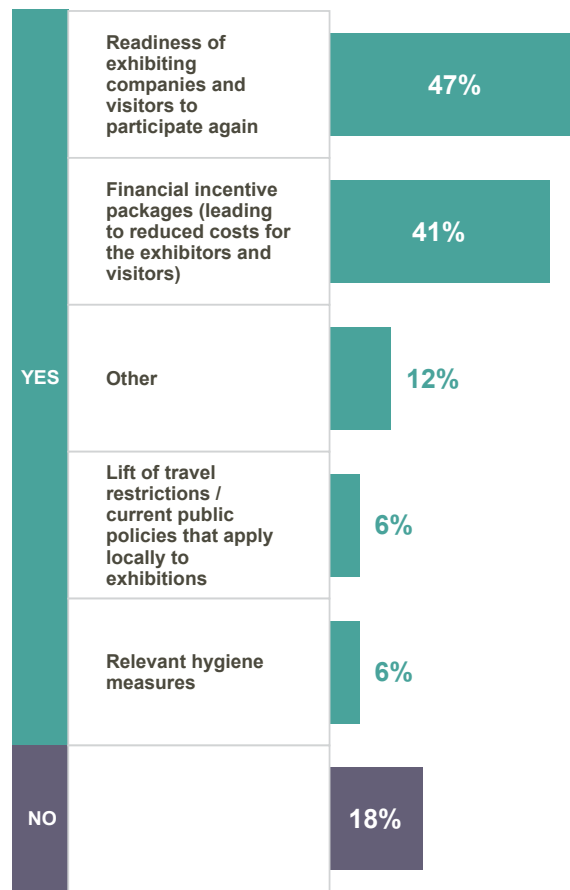
Detailed results for Saudi Arabia



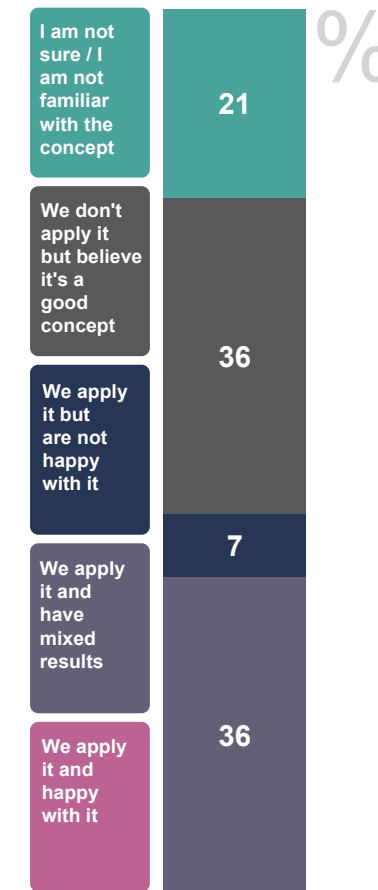
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

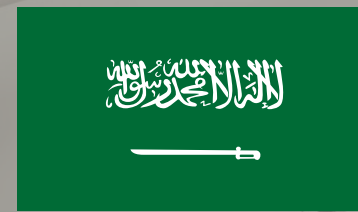


How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

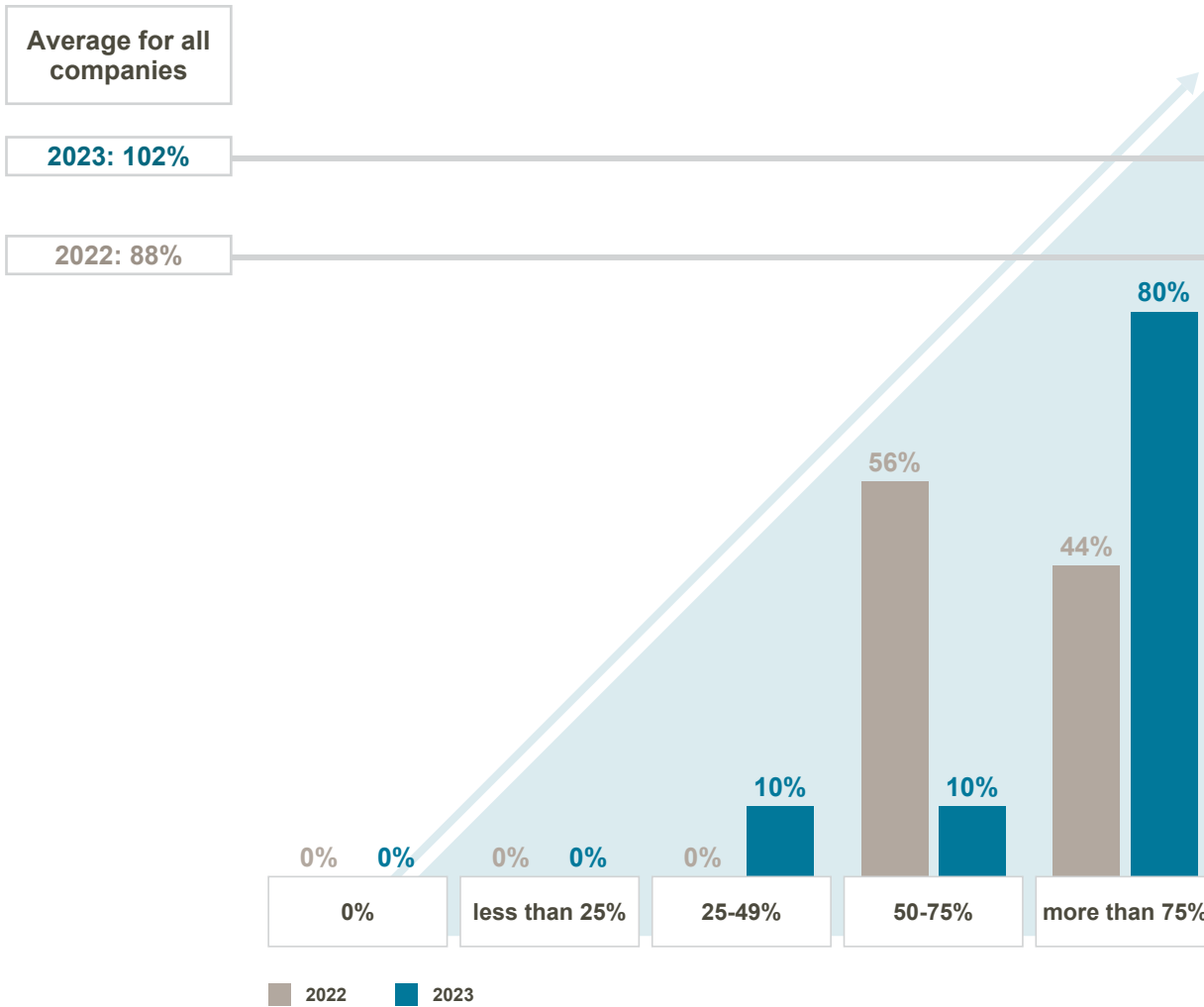


For organisers only (14 answers in total)

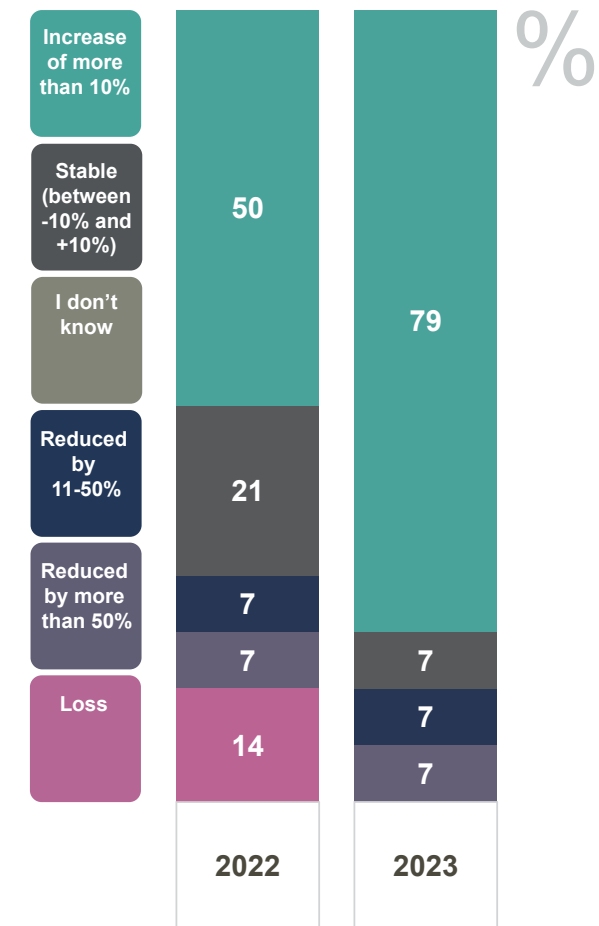
Detailed results for Saudi Arabia



Revenue compared to 2019

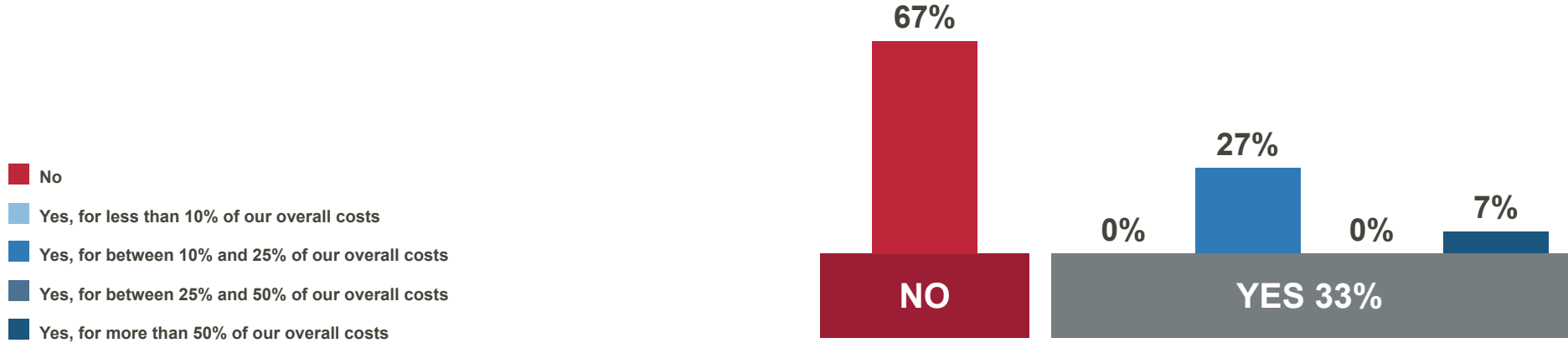


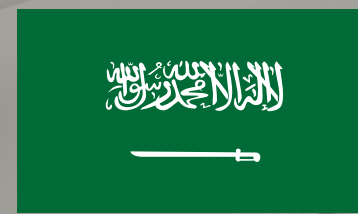
Operating Profits compared to 2019





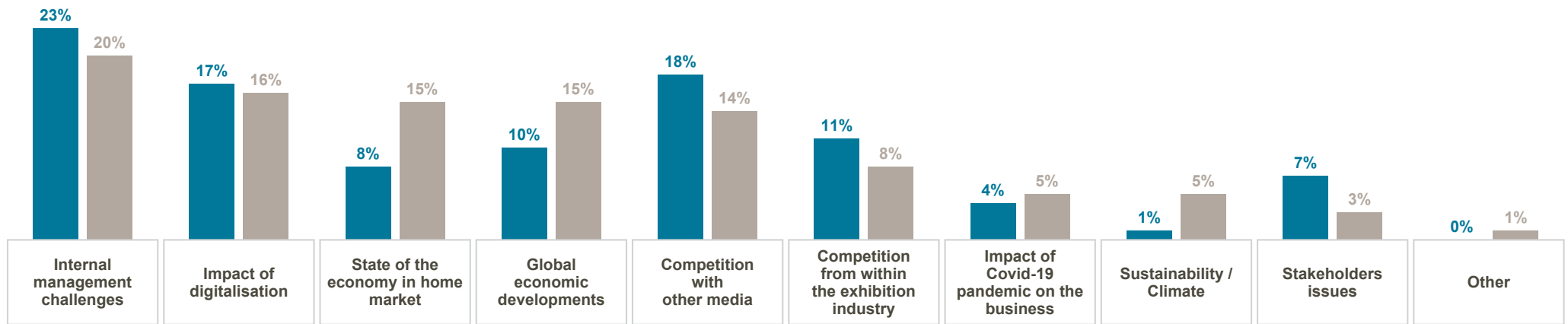
Did your company benefit from public financial support in 2022?





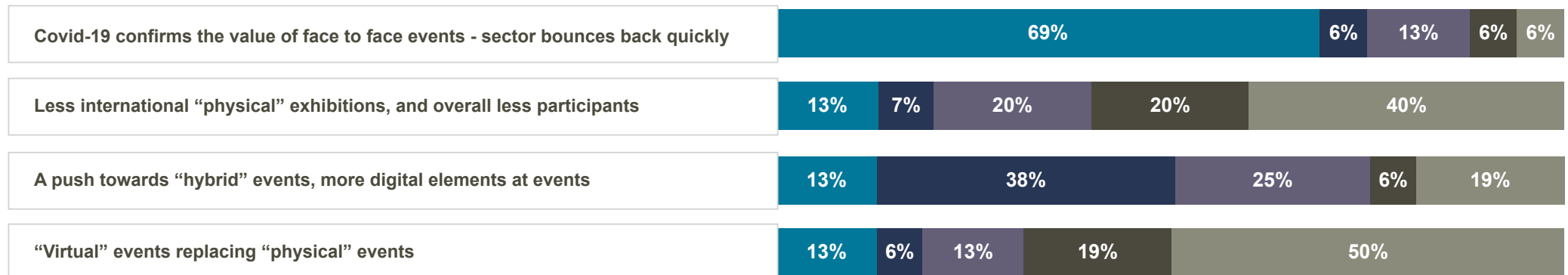
Most important business issues in the exhibition industry

Saudi Arabia Global



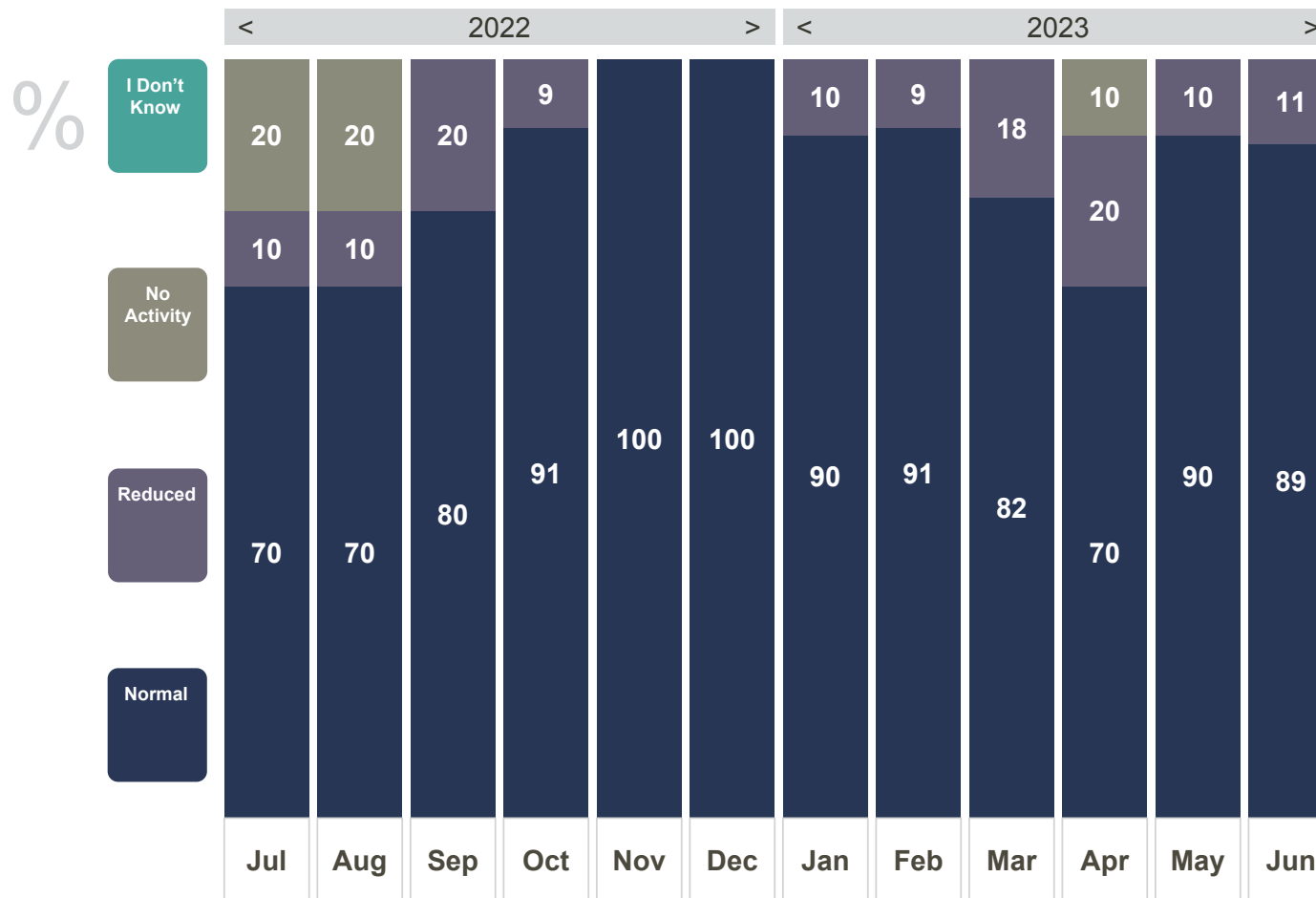
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



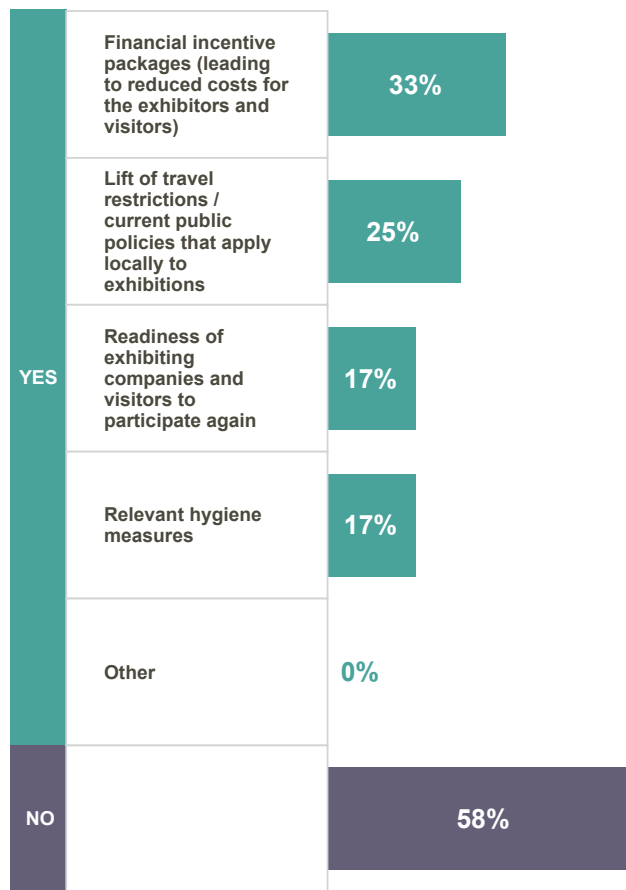
Detailed results for United Arab Emirates



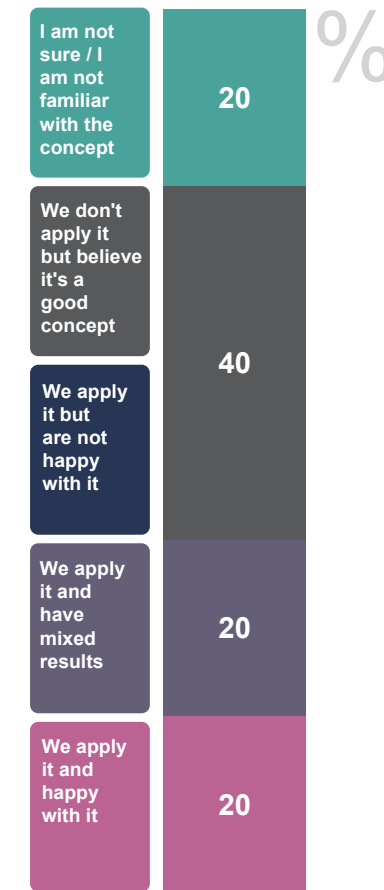
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

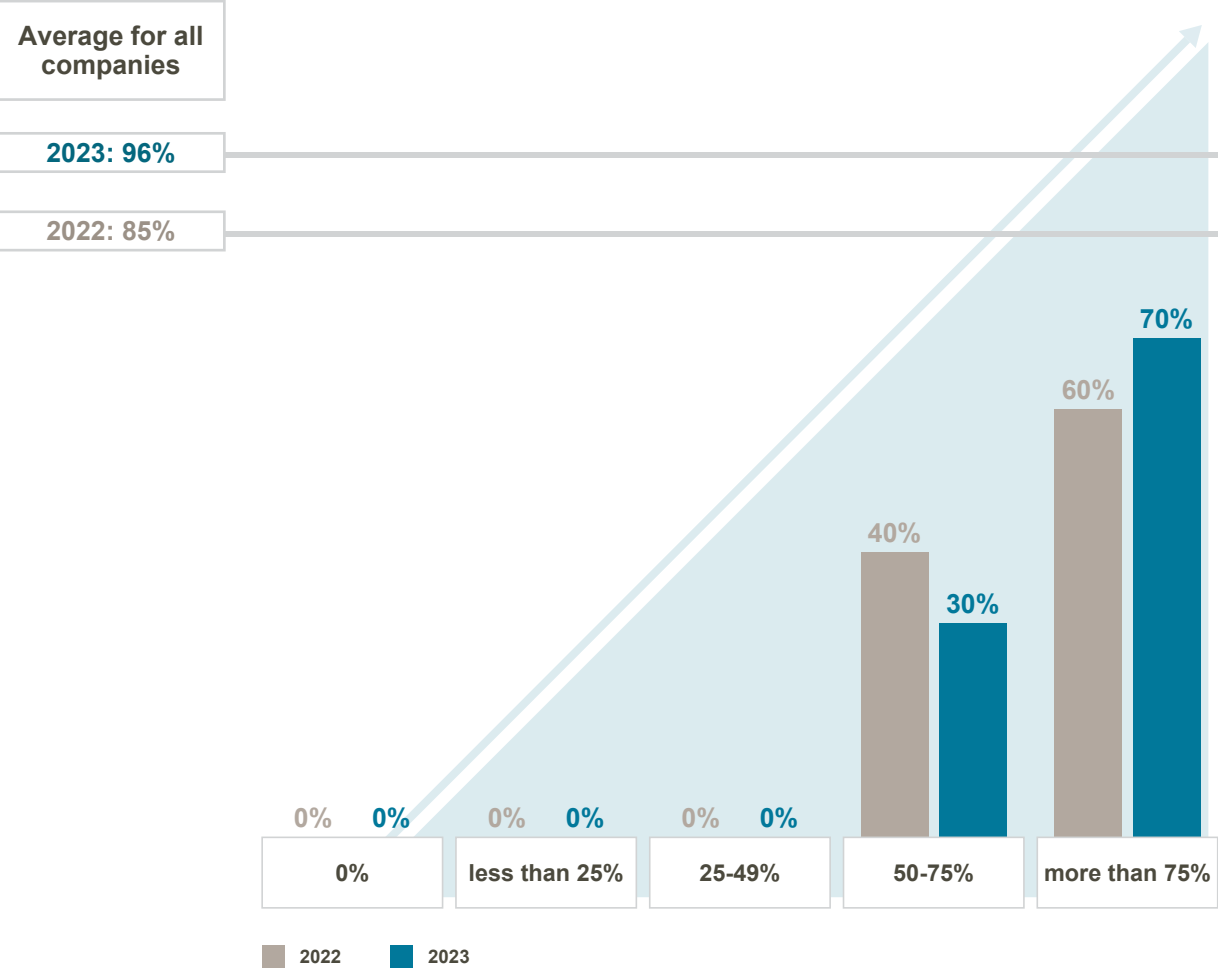


For organisers only (5 answers in total)

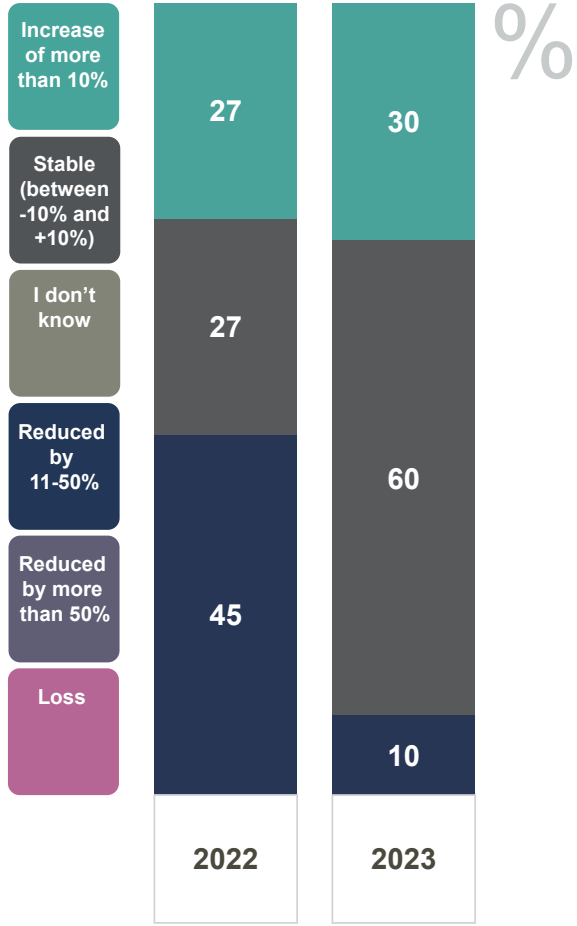
Detailed results for United Arab Emirates



Revenue compared to 2019



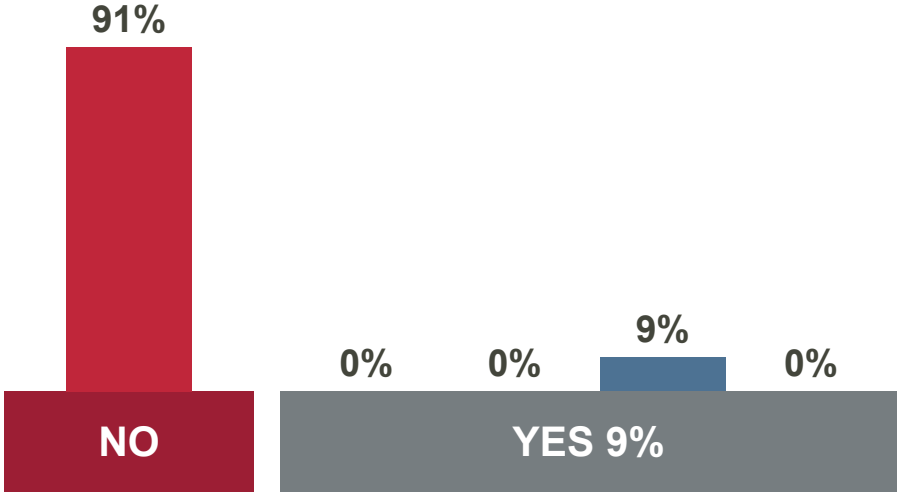
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

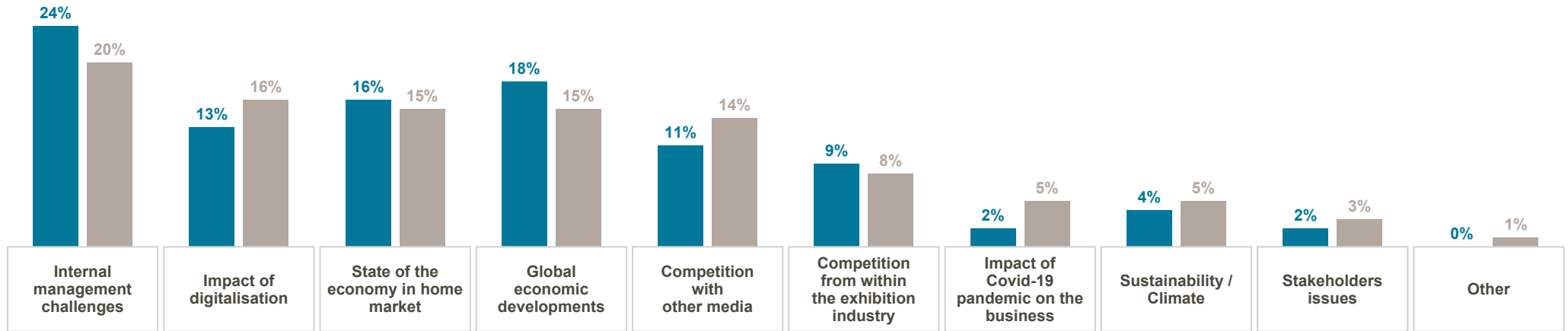


Detailed results for United Arab Emirates



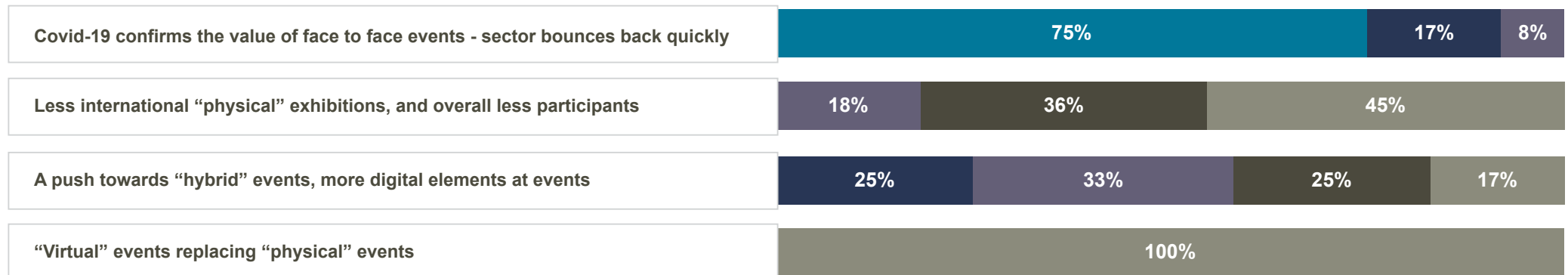
Most important business issues in the exhibition industry

United Arab Emirates Global



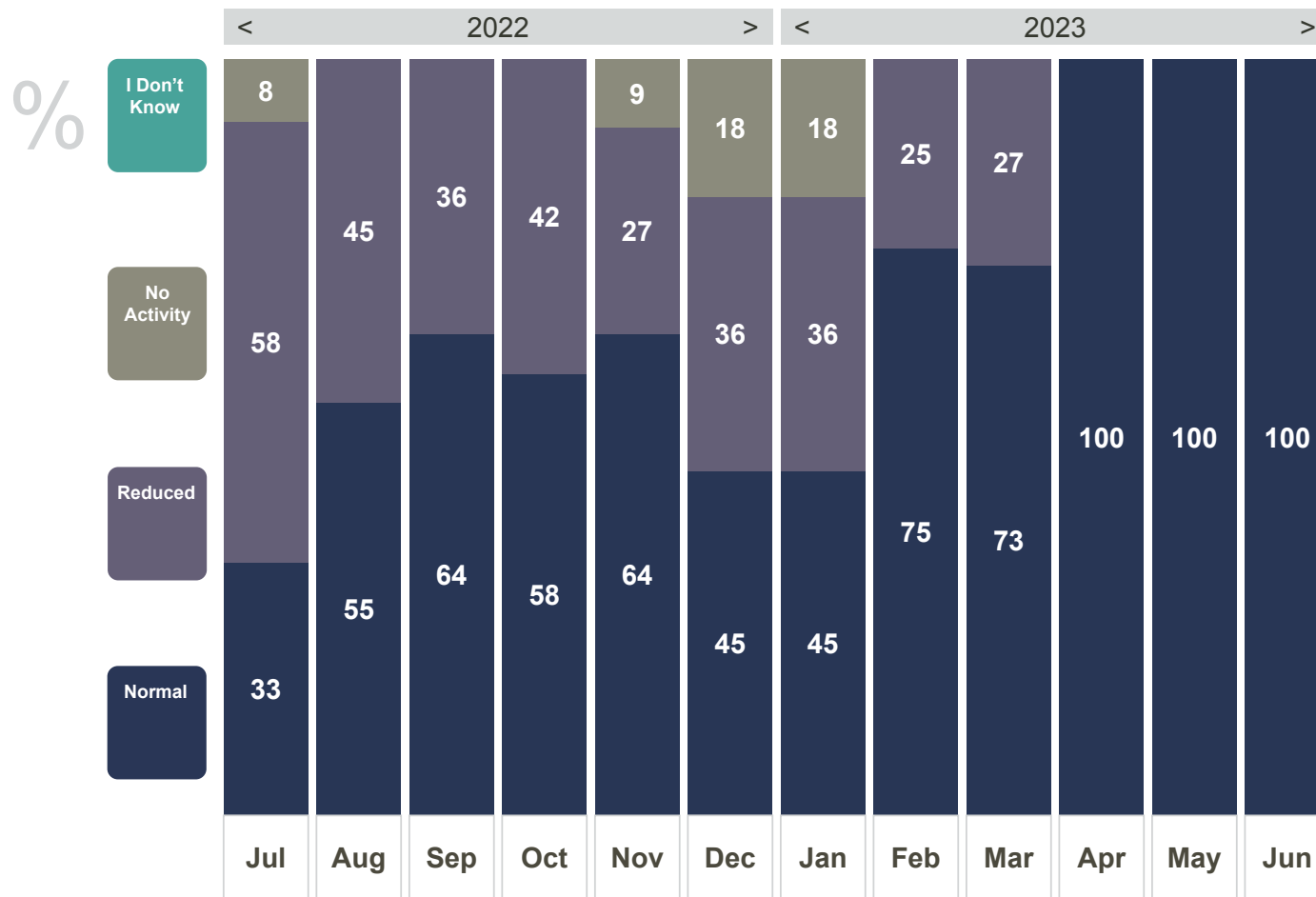
Format of exhibitions in the coming years

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





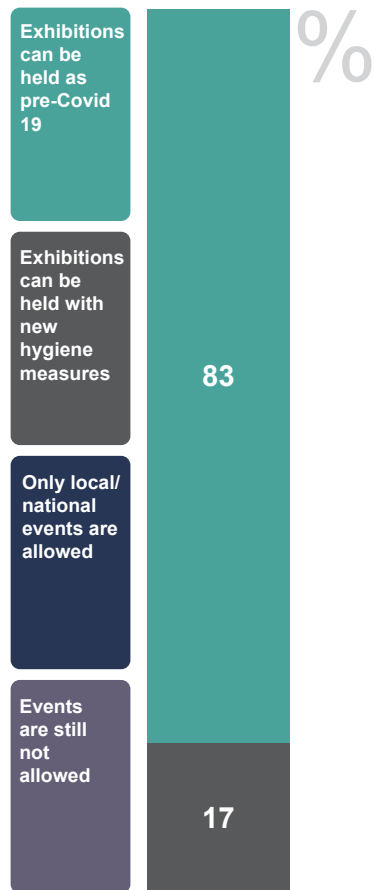
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



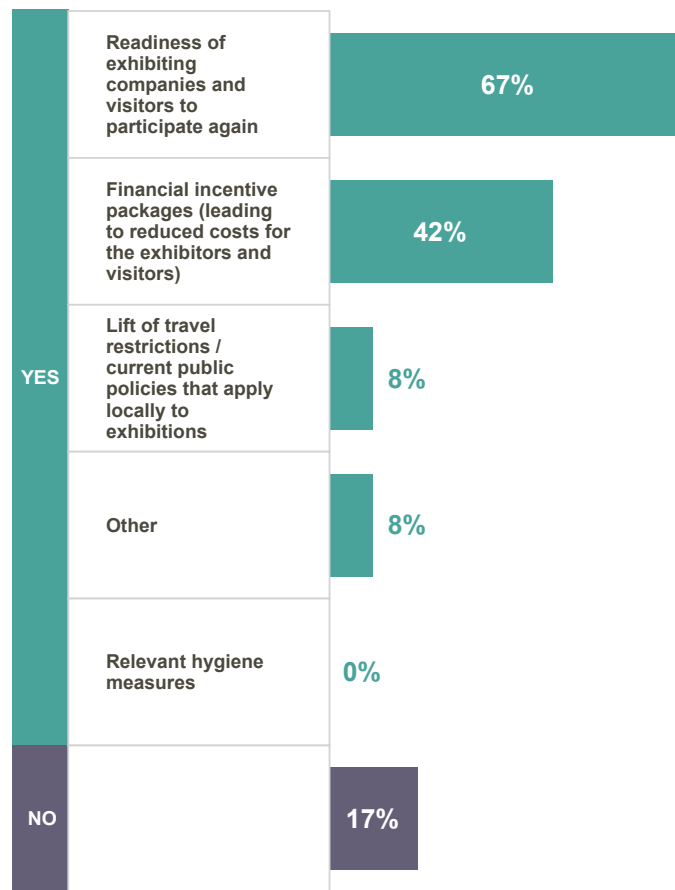
Detailed results for South Africa



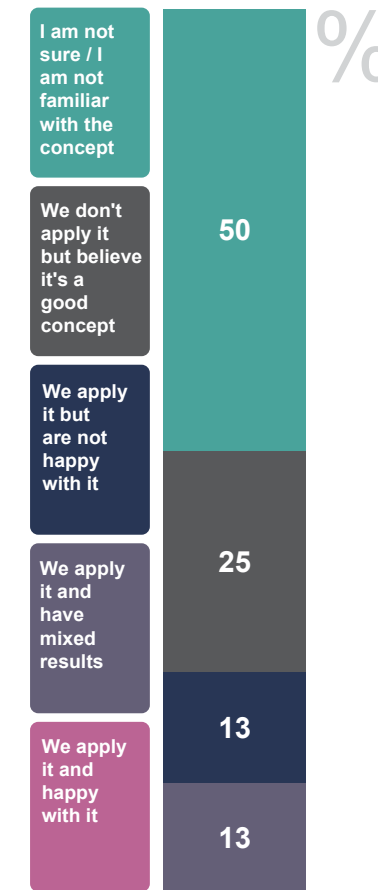
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



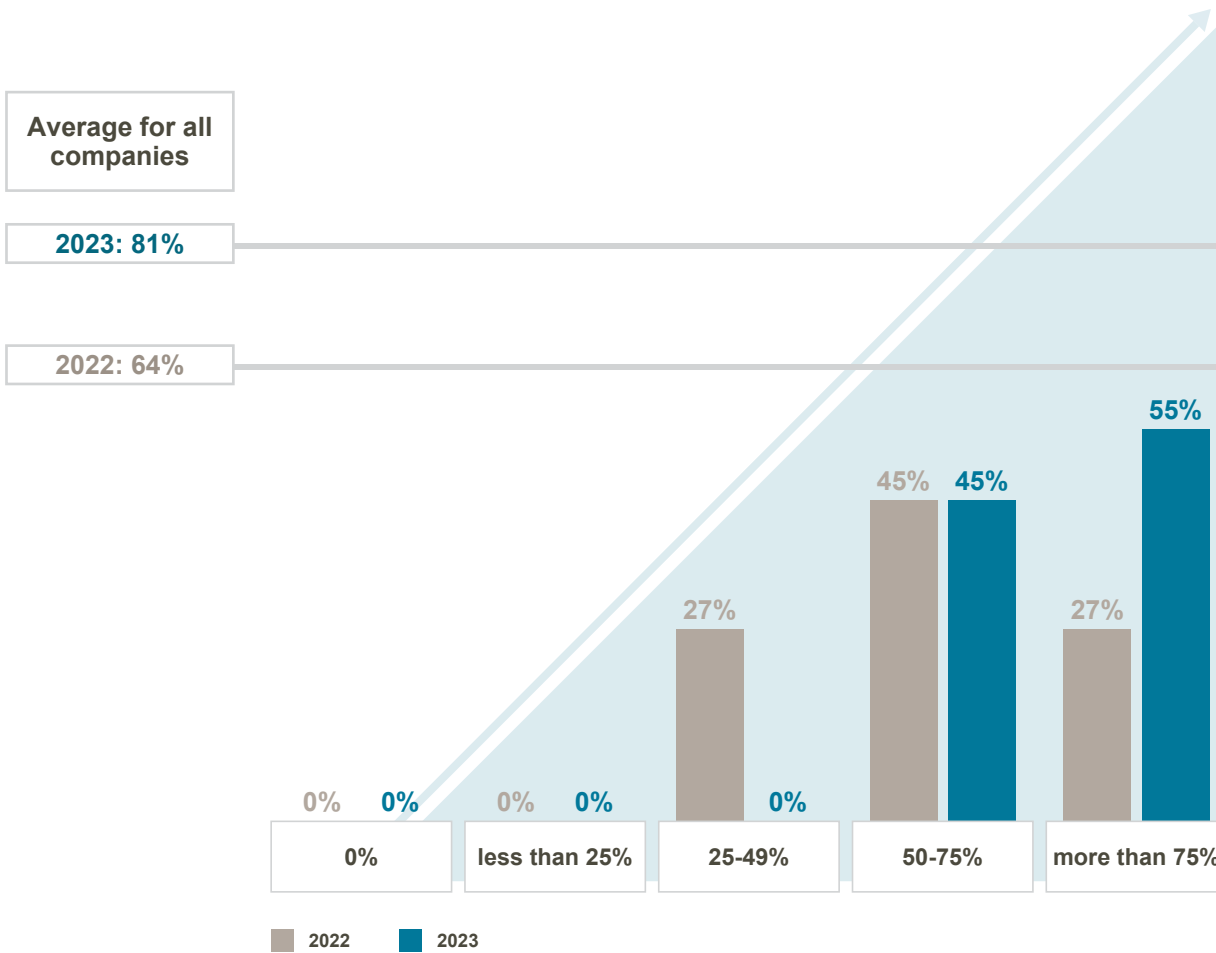
How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



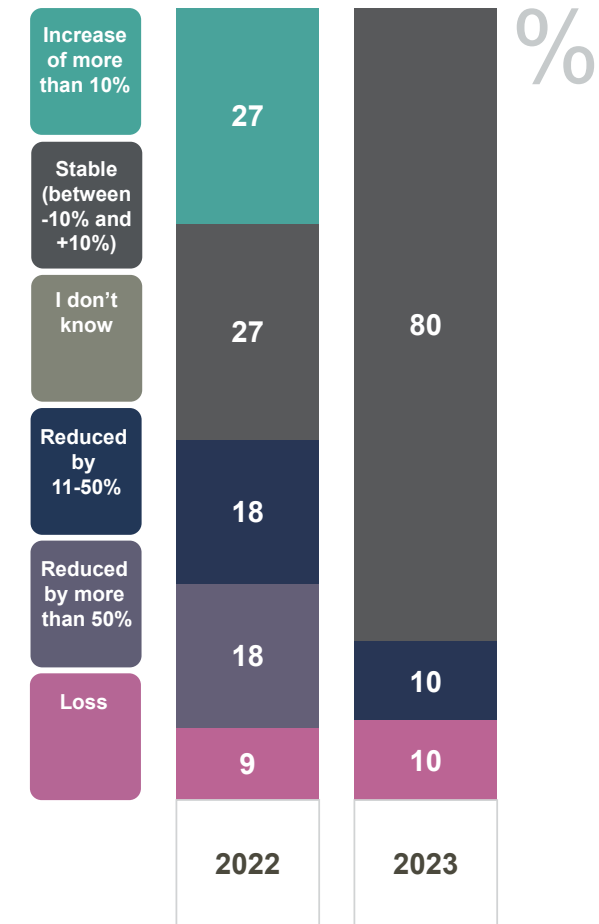
For organisers only (8 answers in total)



Revenue compared to 2019



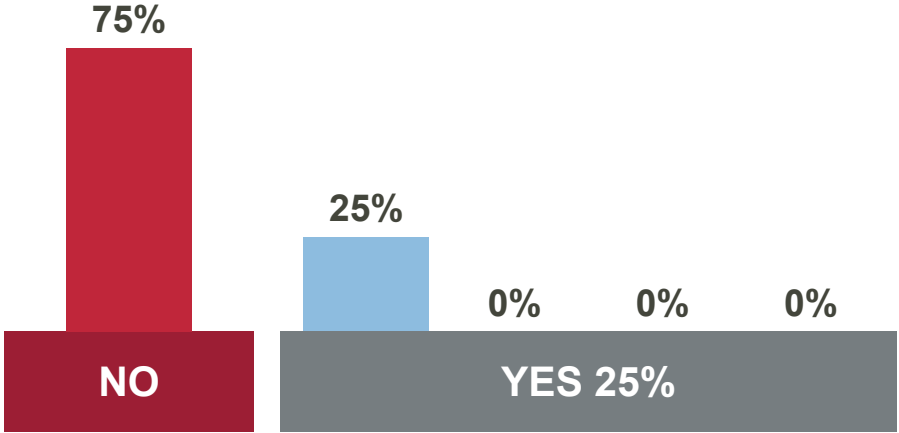
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

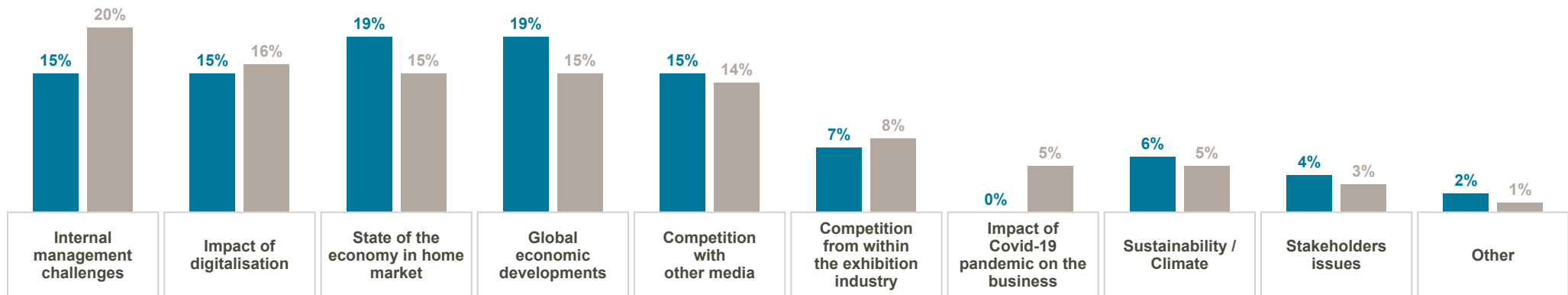
- No
- Yes, for less than 10% of our overall costs
- Yes, for between 10% and 25% of our overall costs
- Yes, for between 25% and 50% of our overall costs
- Yes, for more than 50% of our overall costs





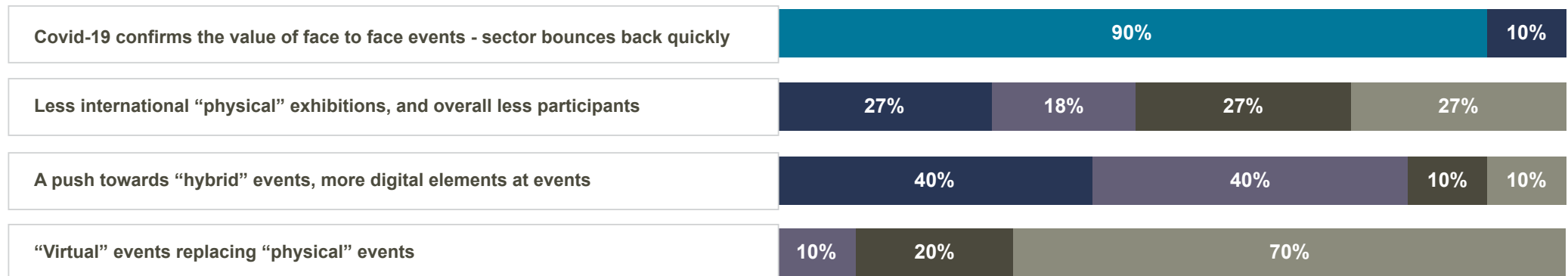
Most important business issues in the exhibition industry

South Africa Global



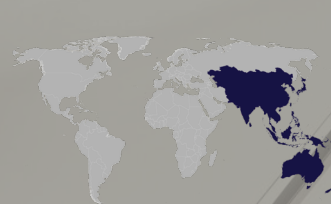
Format of exhibitions in the coming years

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



A network diagram consisting of several 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 highlights. The connections are thin, light-colored lines. The entire scene is set against a solid, light purple background.

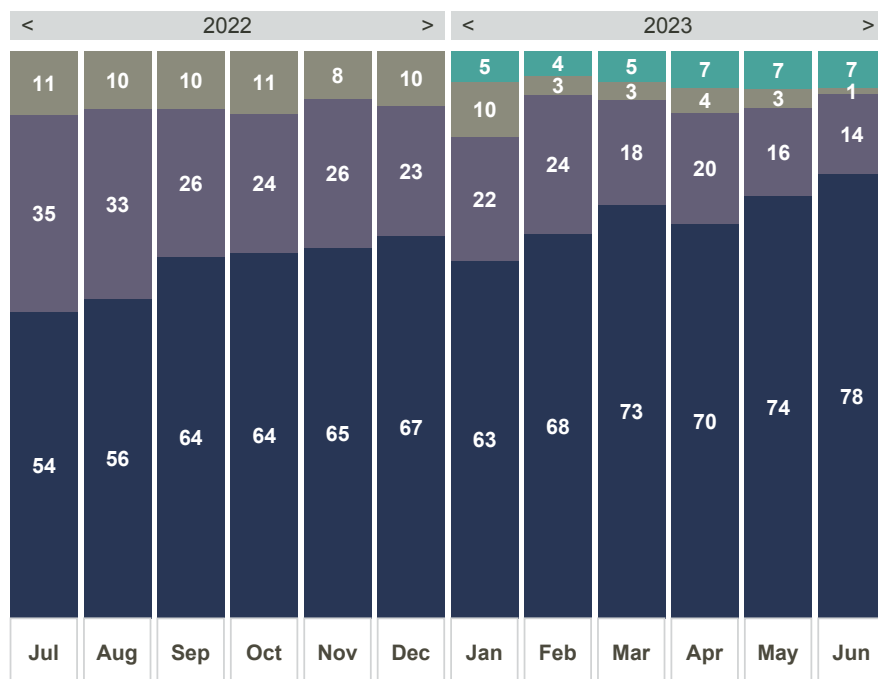
Asia-Pacific



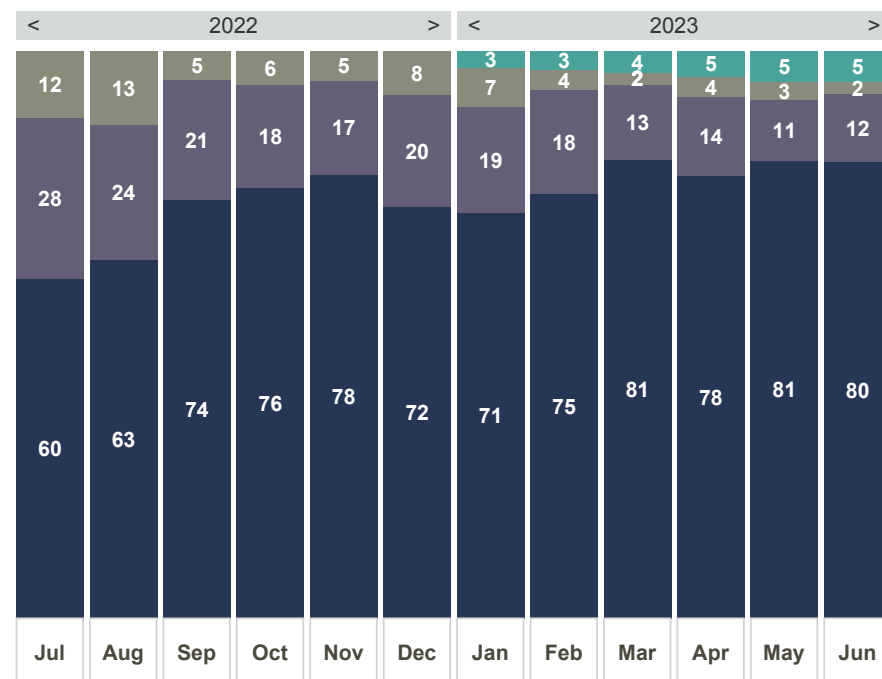
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



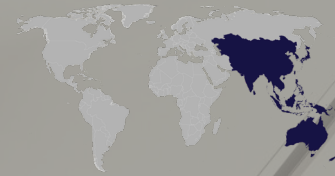
Asia-Pacific



World

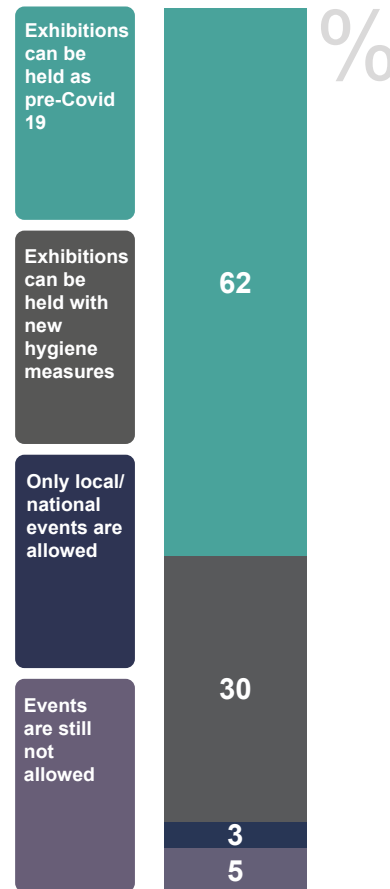


%

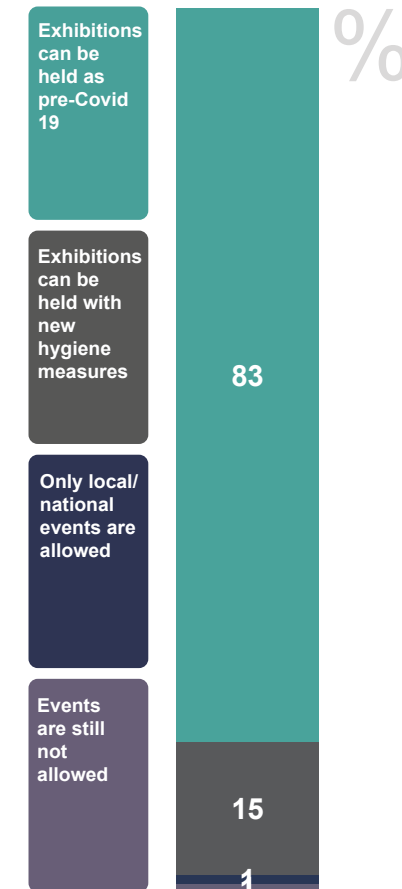


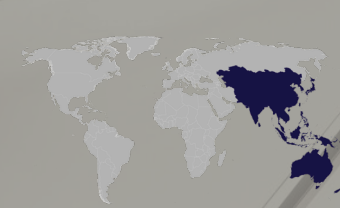
What is the overall status of operations in your city?

Asia-Pacific



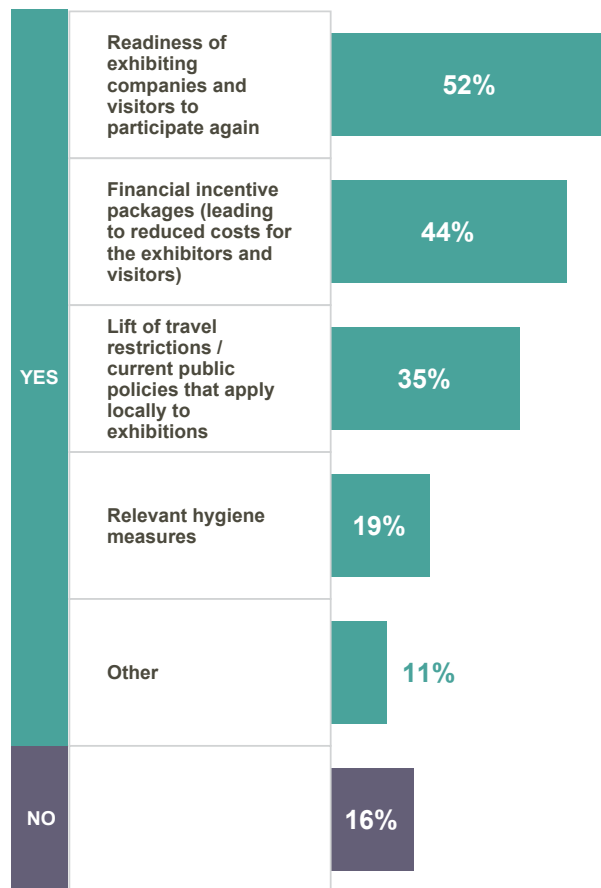
World



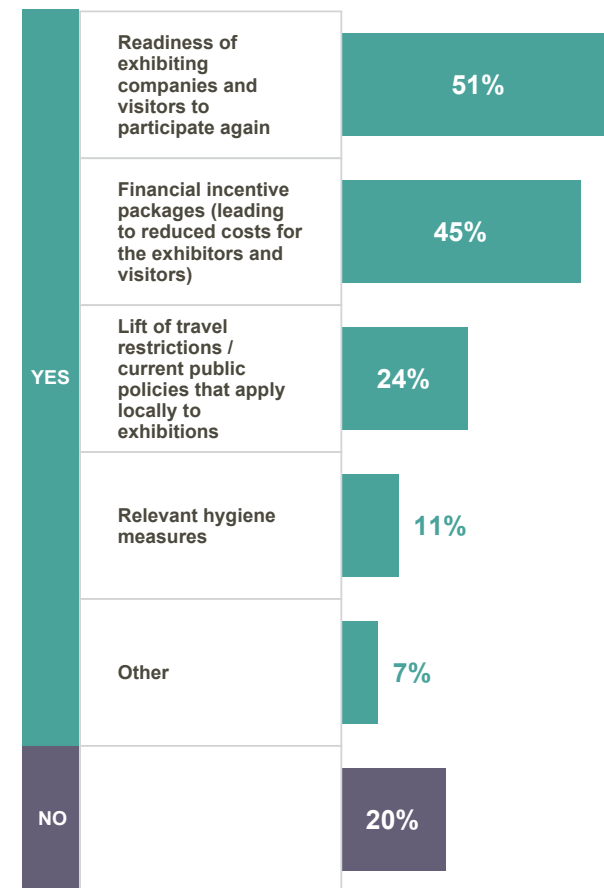


Do you believe specific measures need to be implemented to help the recovery of exhibitions?

Asia-Pacific



World



How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

Asia-Pacific



For organisers only (63 answers in total)

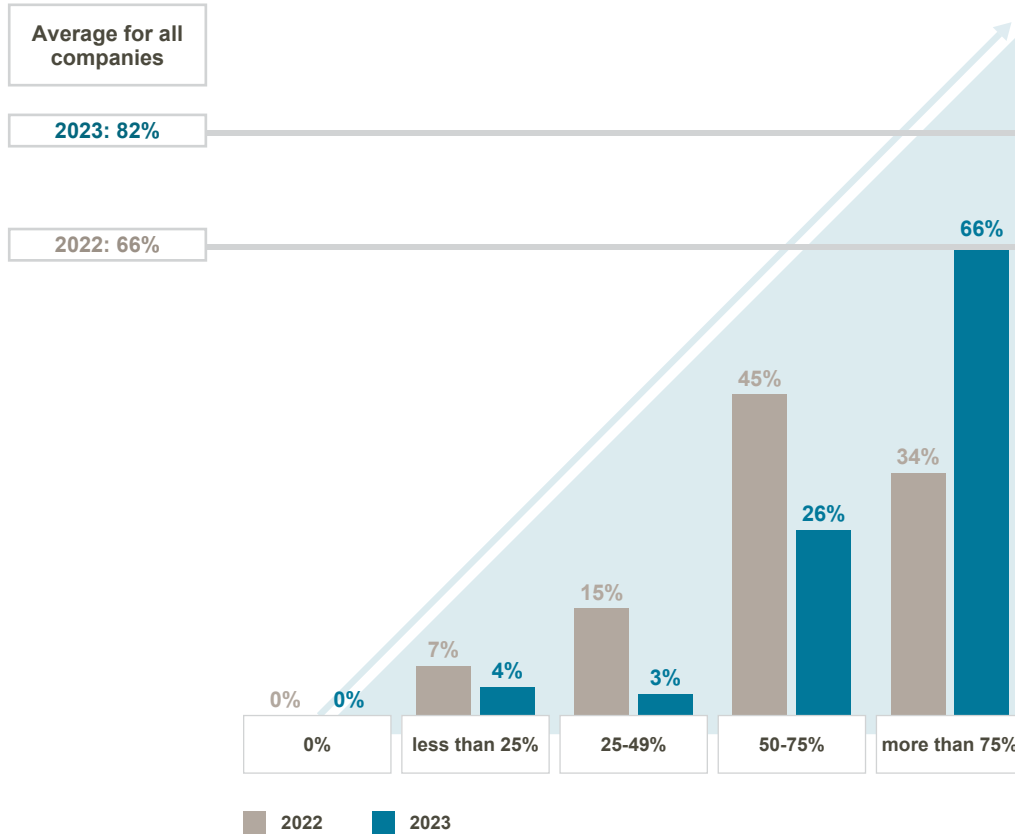
World



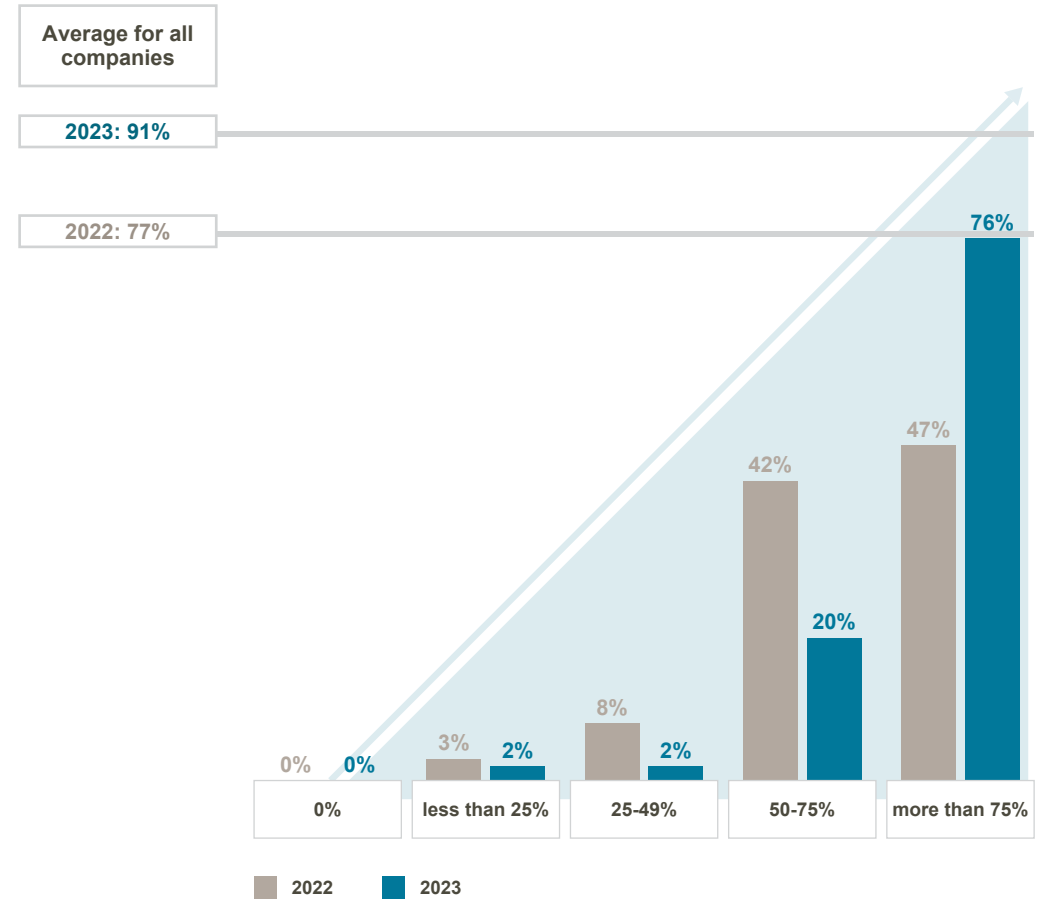
For organisers only (257 answers in total)

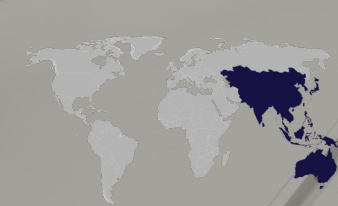
Revenue compared to 2019

Asia-Pacific



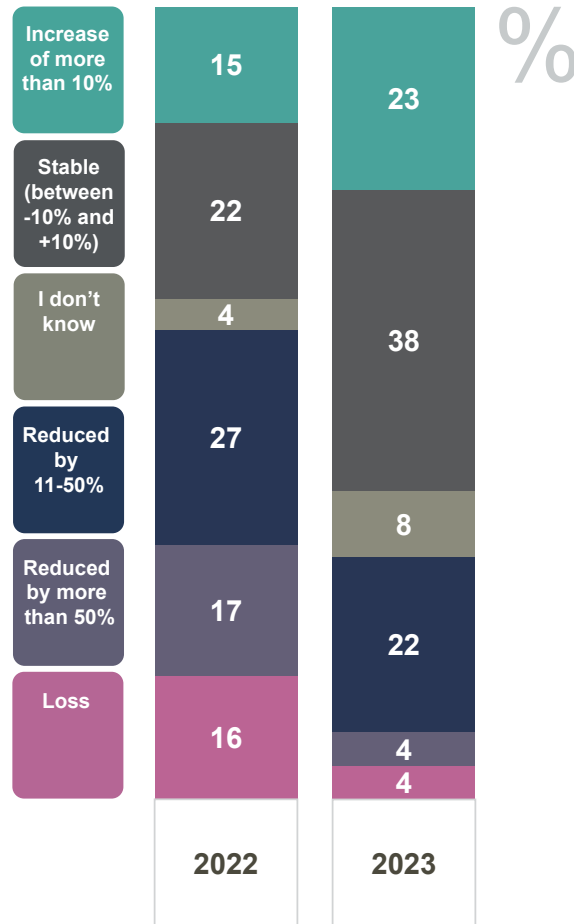
World



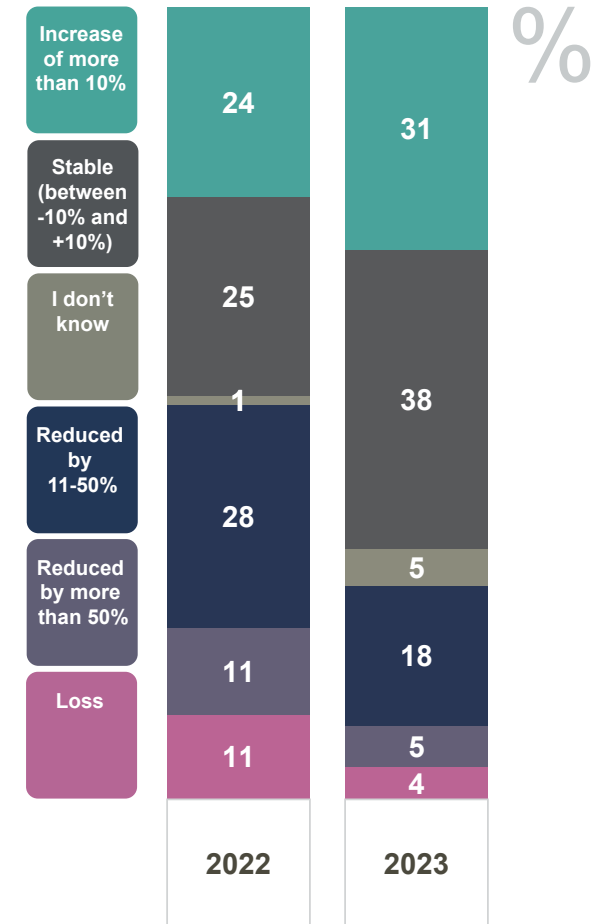


Operating Profits compared to 2019

Asia-Pacific



World

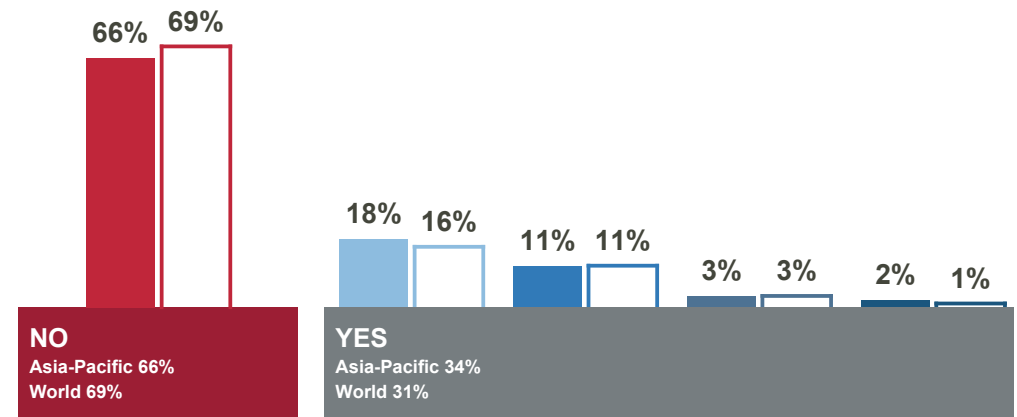


Did your company benefit from public financial support in 2022?

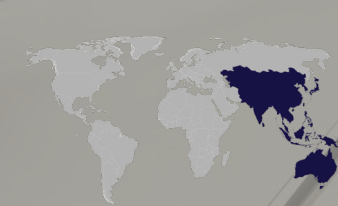
Asia-Pacific

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



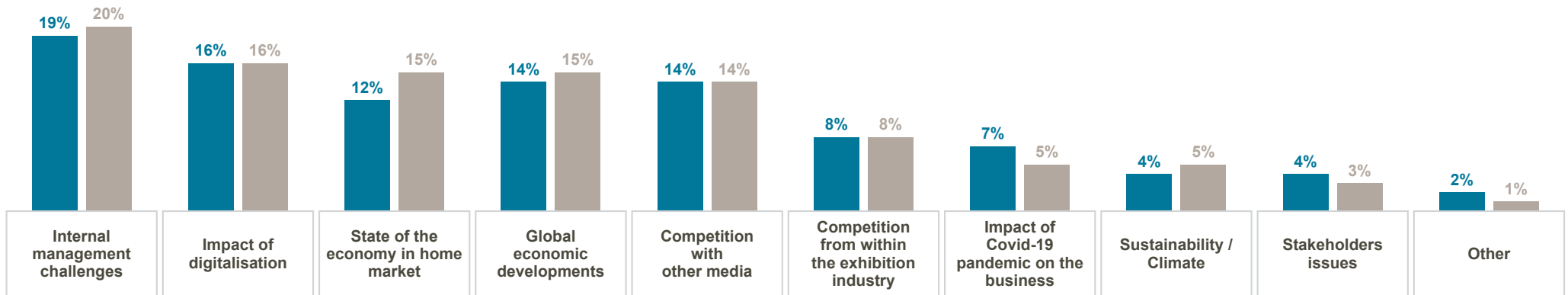
Most Important Business Issues - Format of Exhibitions - Asia-Pacific



Most important business issues in the exhibition industry

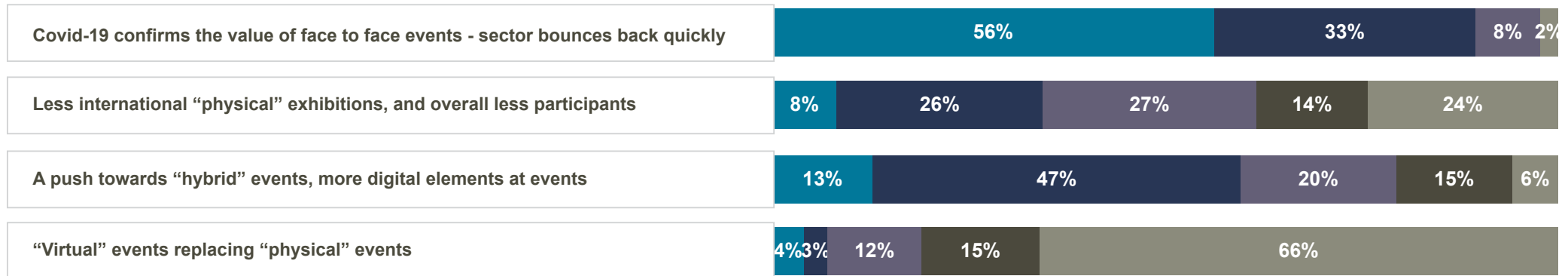
Asia-Pacific

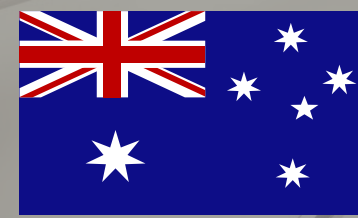
Global



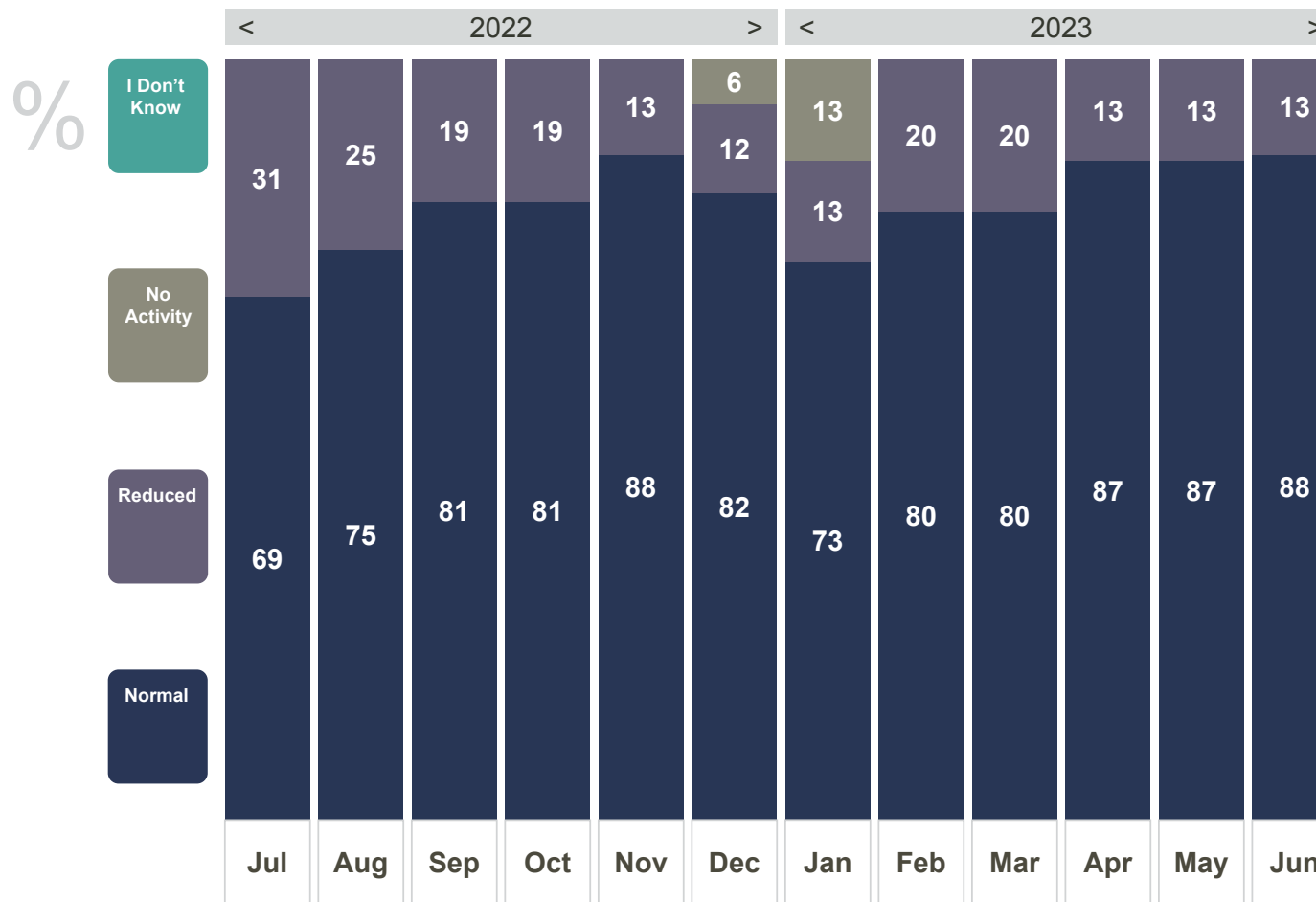
Format of exhibitions in the coming years

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





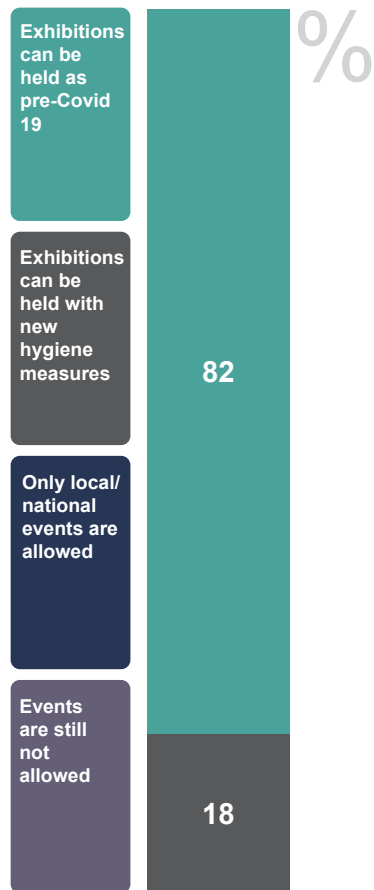
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



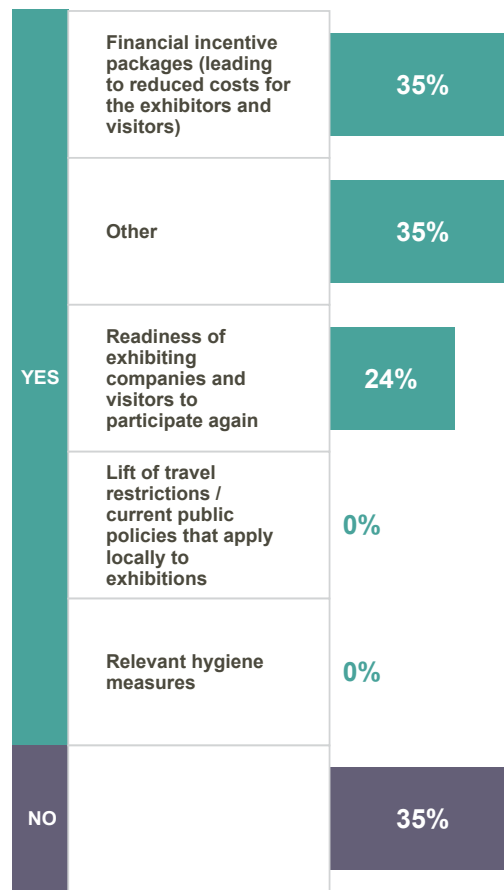
Detailed results for Australia



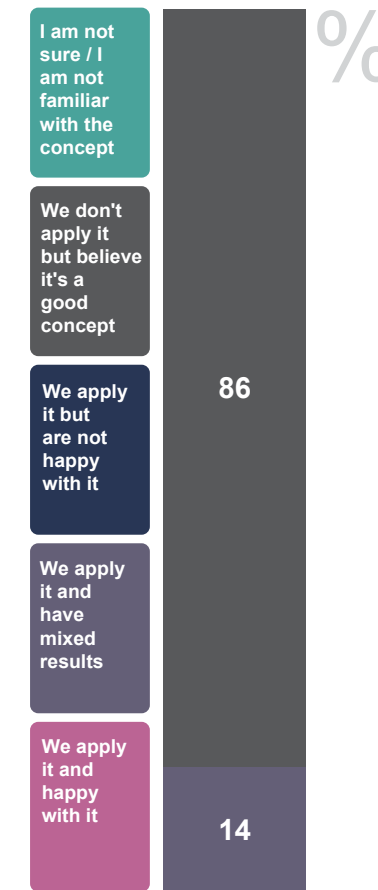
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

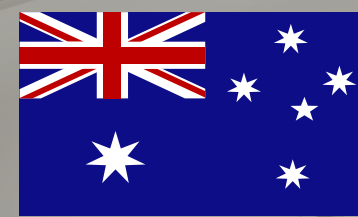


How do you assess the potential of "hosted buyers" packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

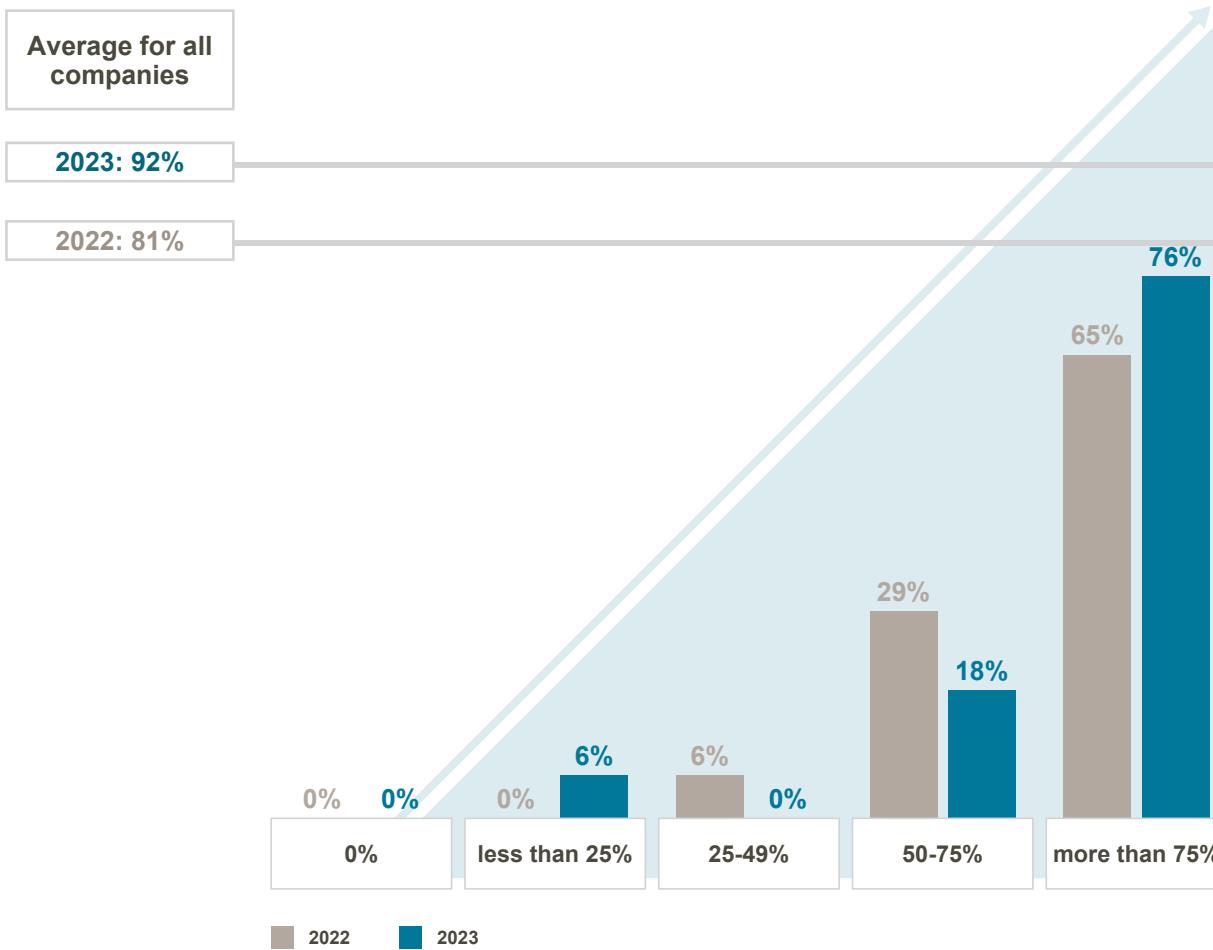


For organisers only (7 answers in total)

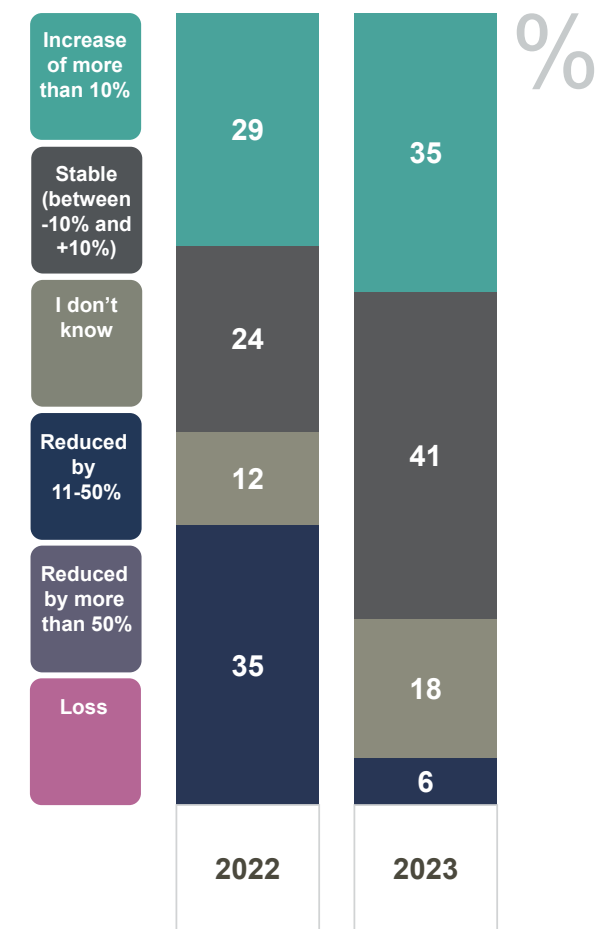
Detailed results for Australia

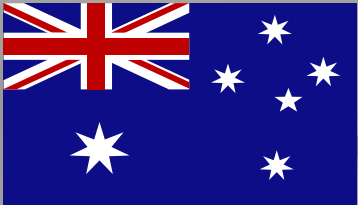


Revenue compared to 2019



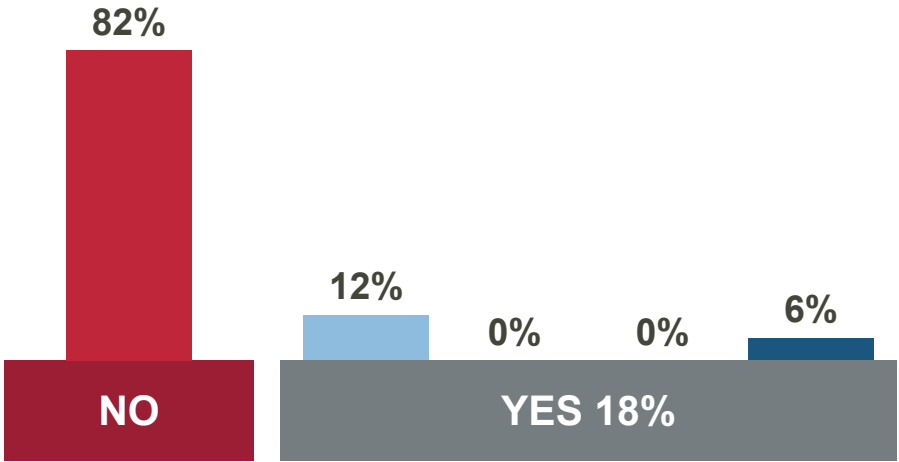
Operating Profits compared to 2019

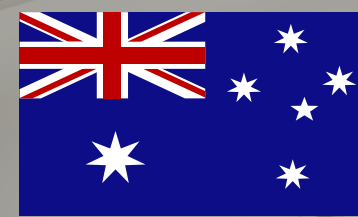




Did your company benefit from public financial support in 2022?

- 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

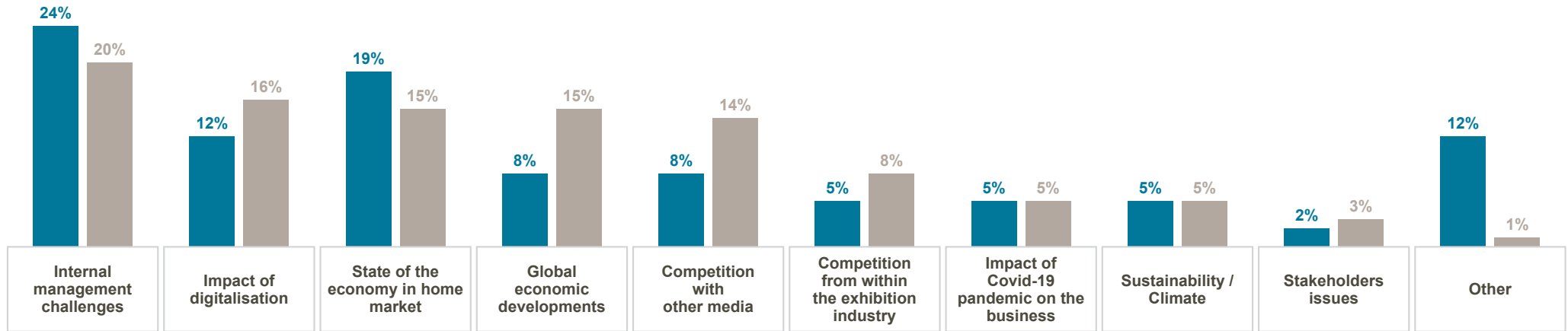




Most important business issues in the exhibition industry

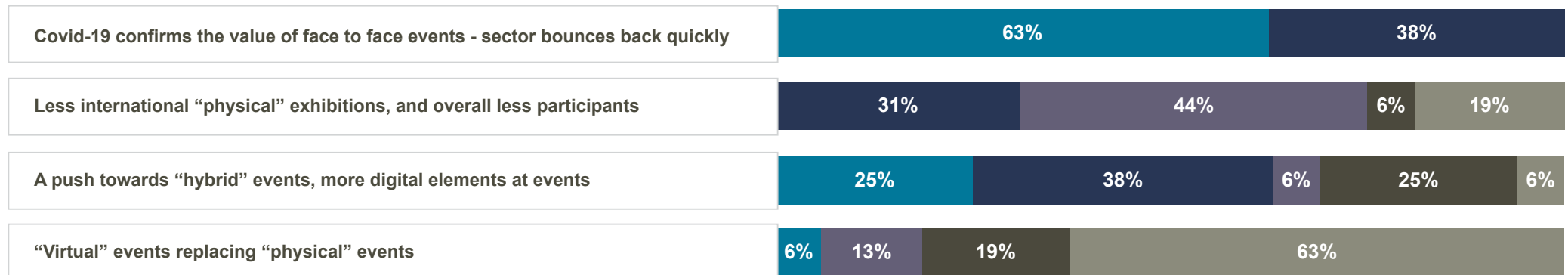
Australia

Global



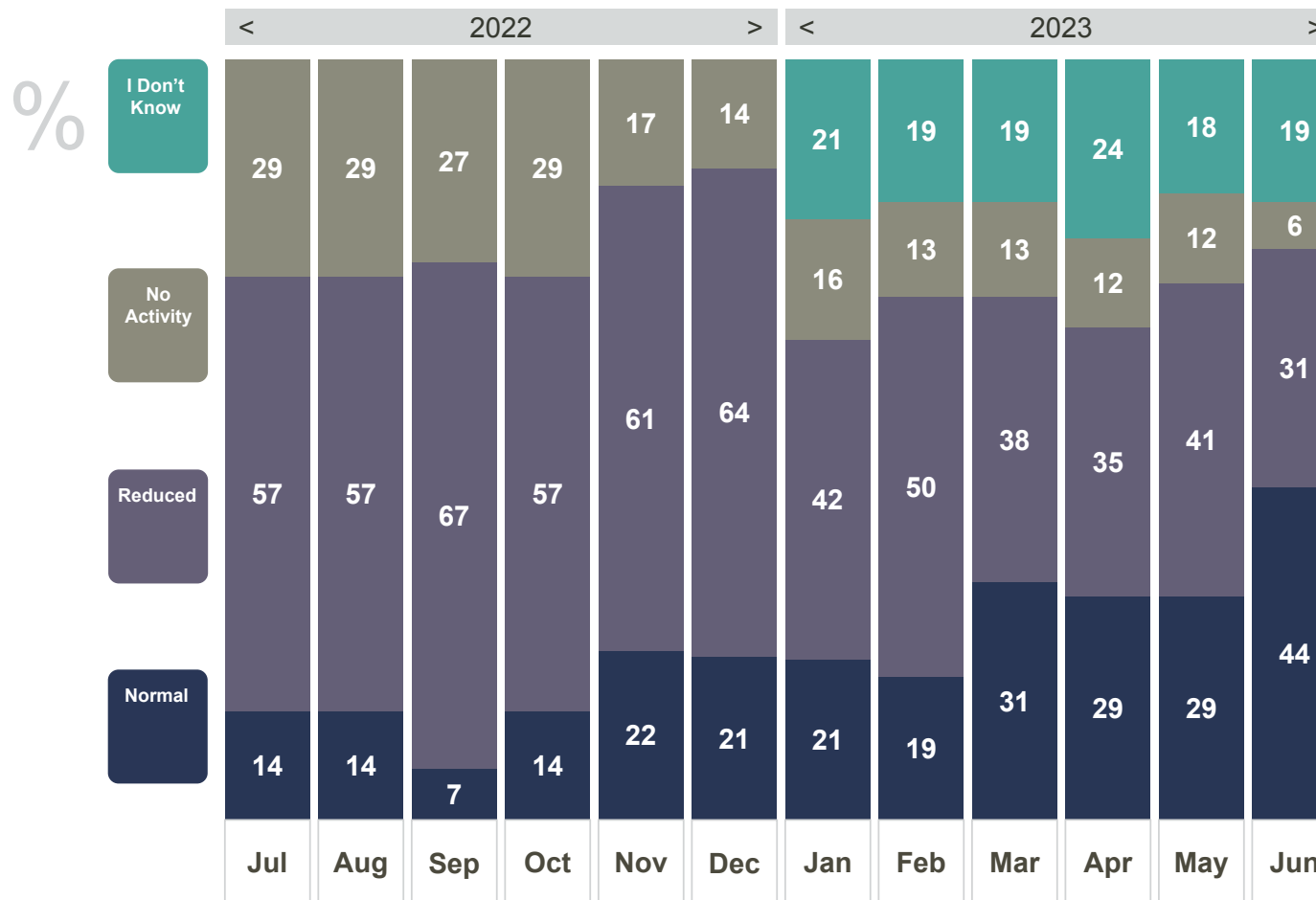
Format of exhibitions in the coming years

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





Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



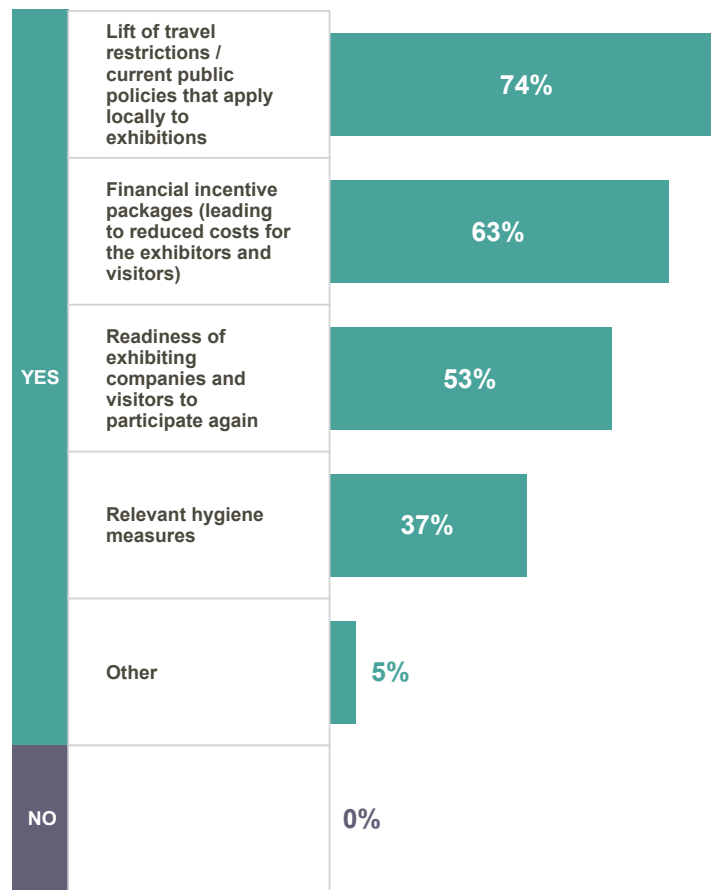
Detailed results for China



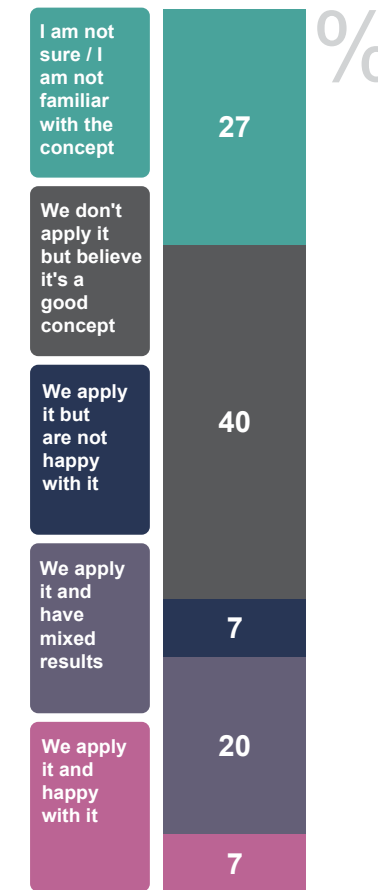
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



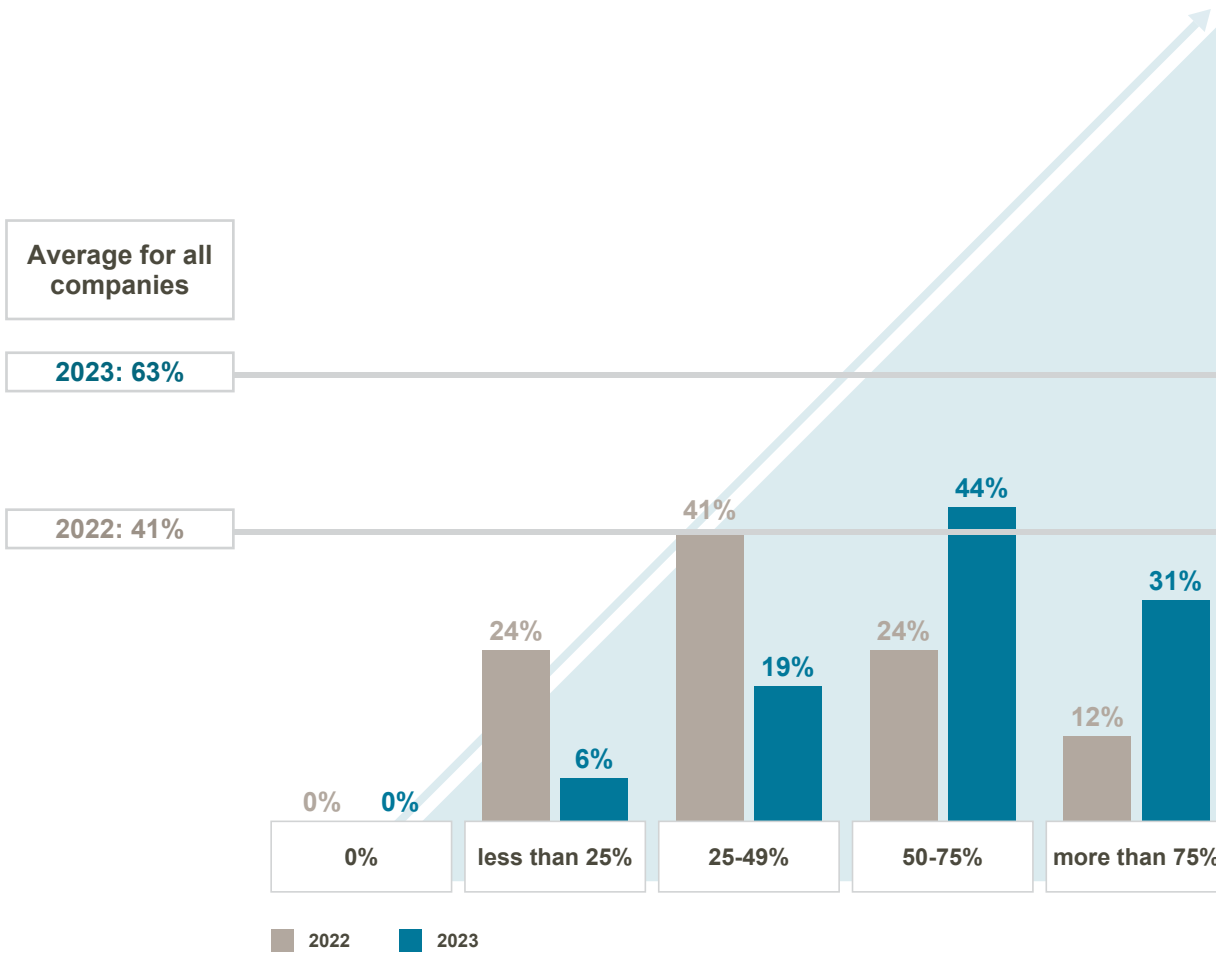
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



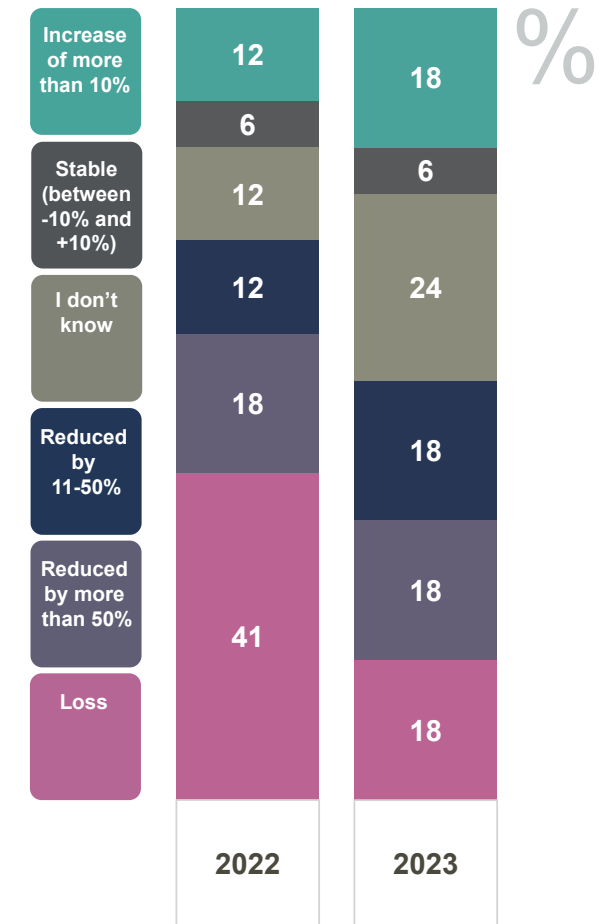
For organisers only (15 answers in total)



Revenue compared to 2019



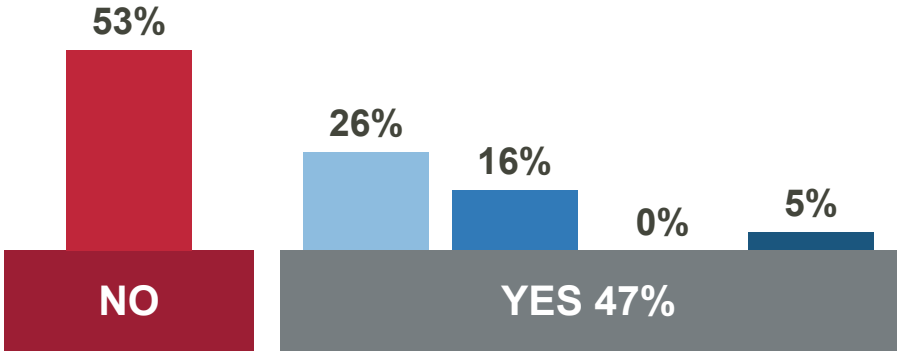
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

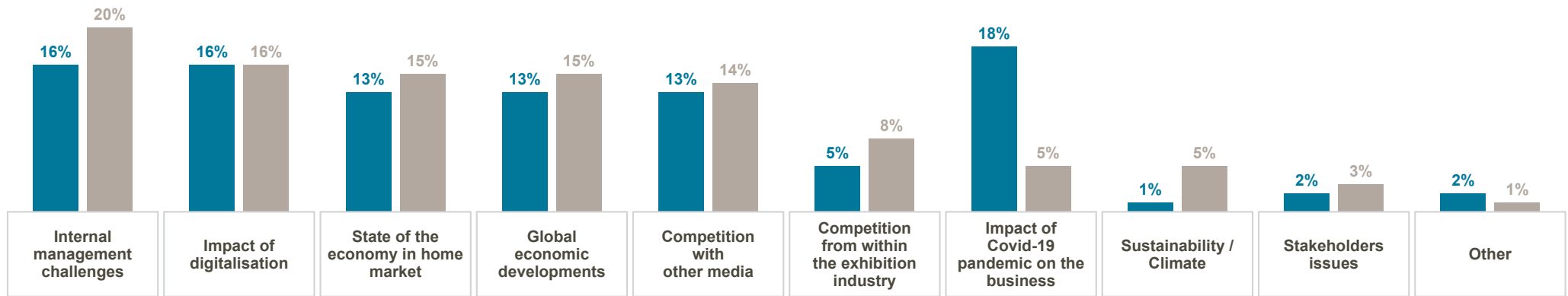




Most important business issues in the exhibition industry

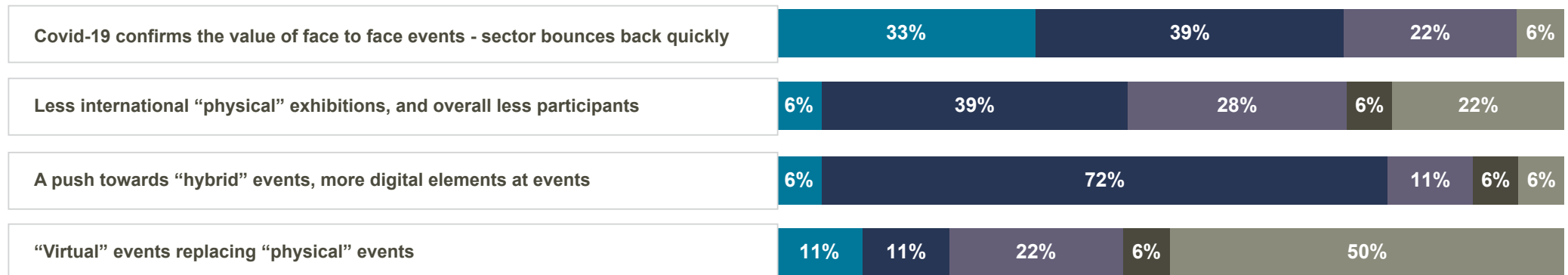
China

Global



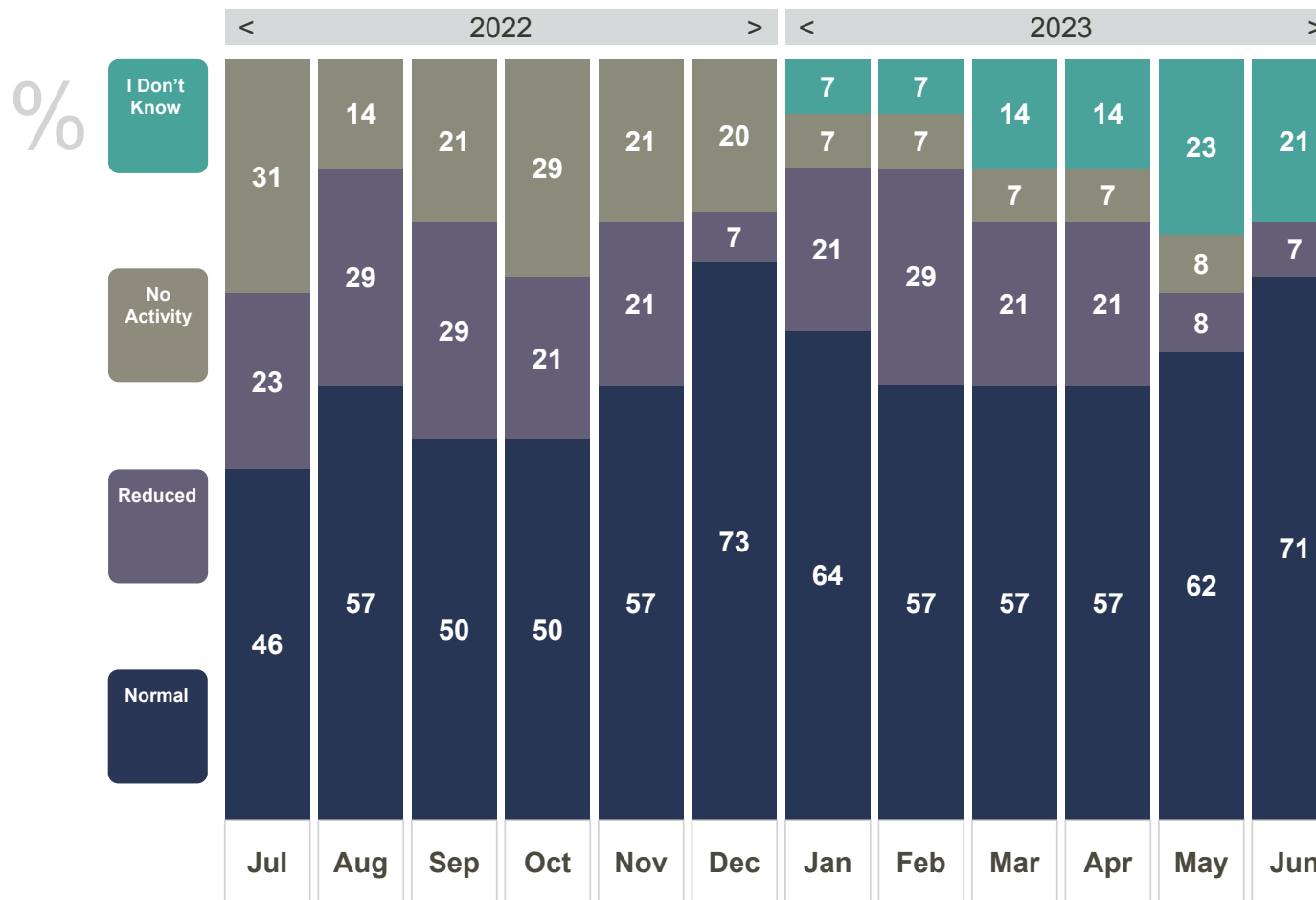
Format of exhibitions in the coming years

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





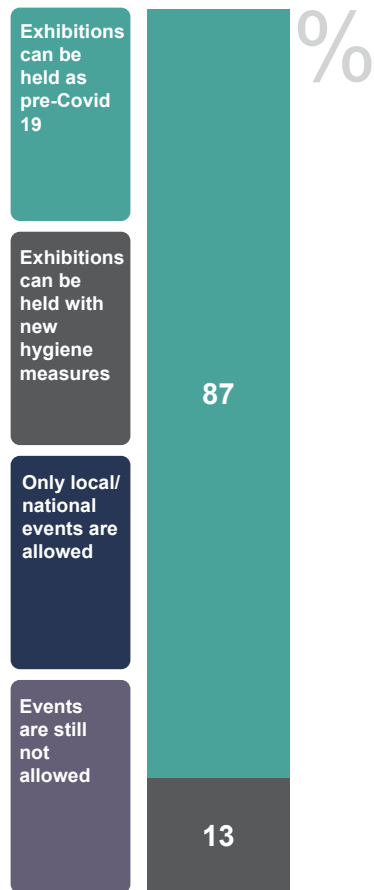
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



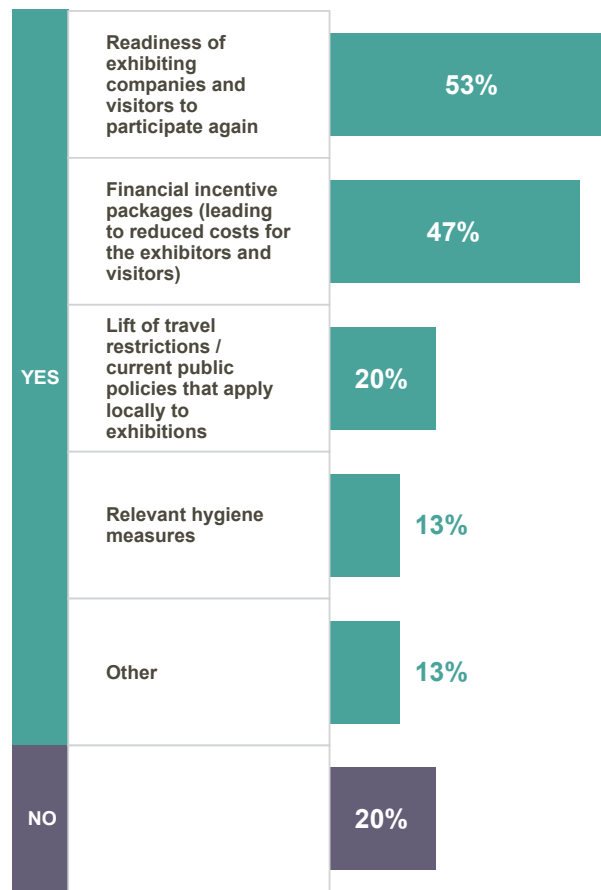
Detailed results for India



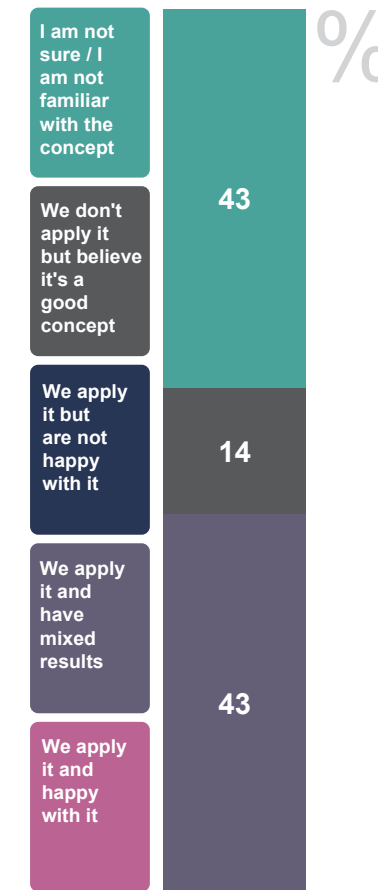
What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?



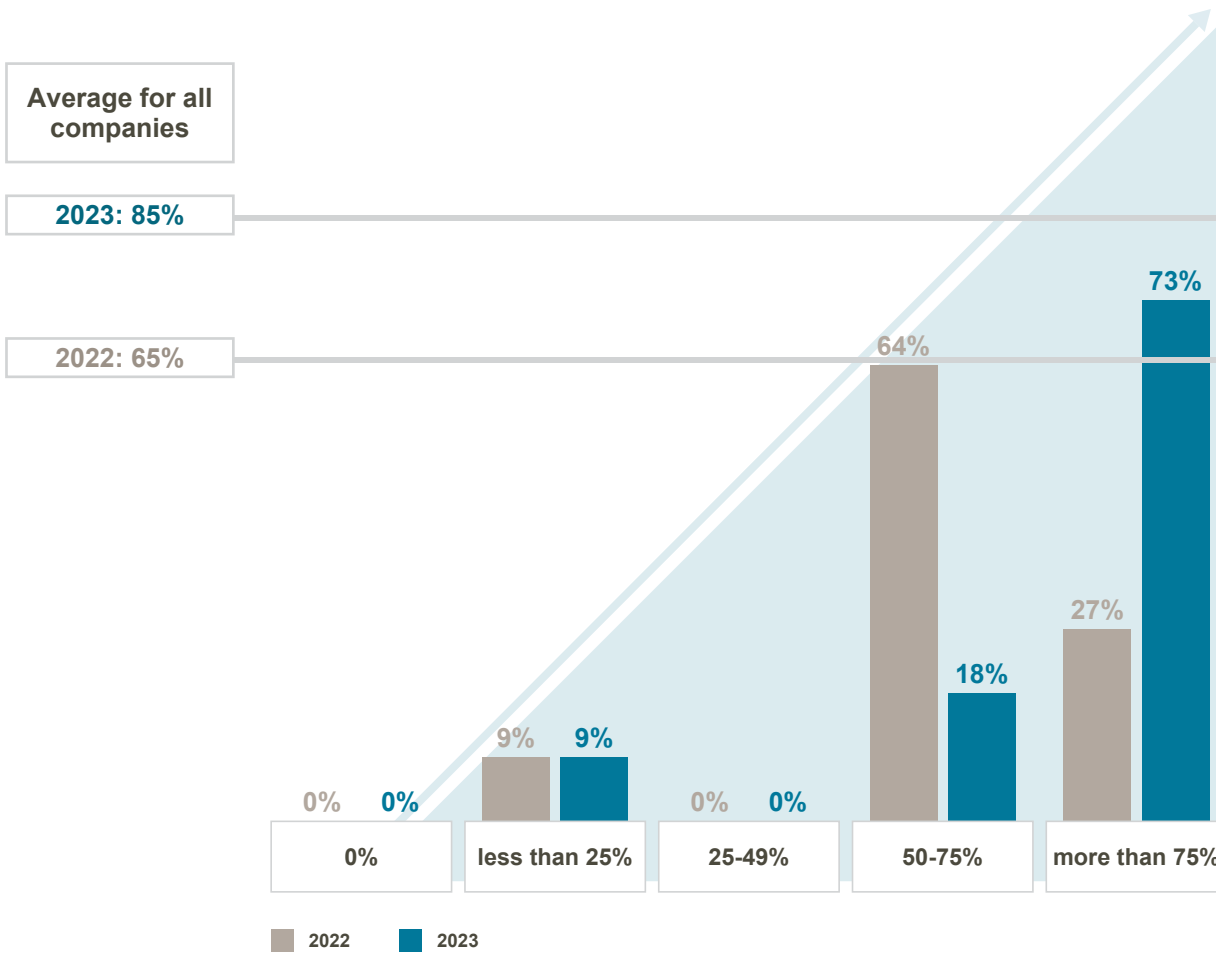
How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?



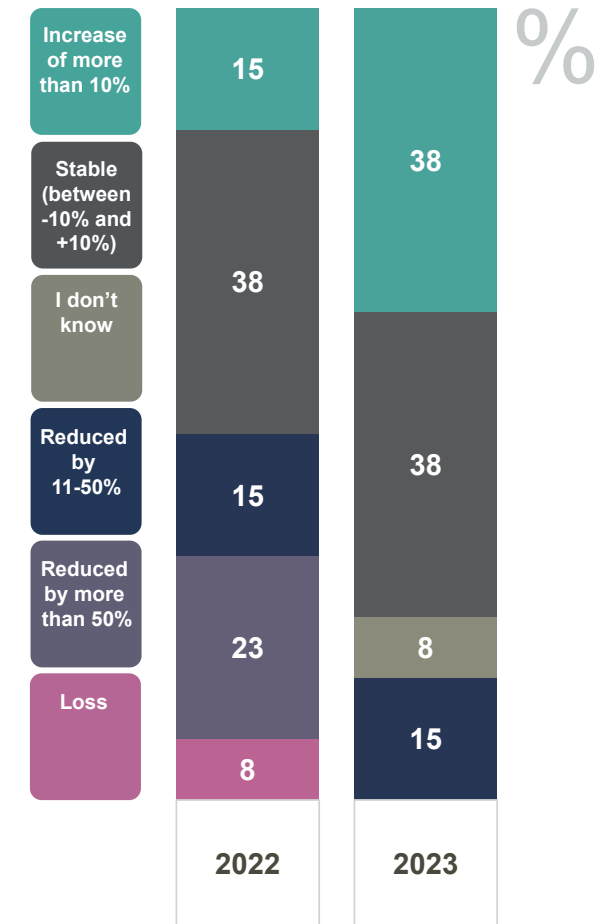
For organisers only (7 answers in total)



Revenue compared to 2019



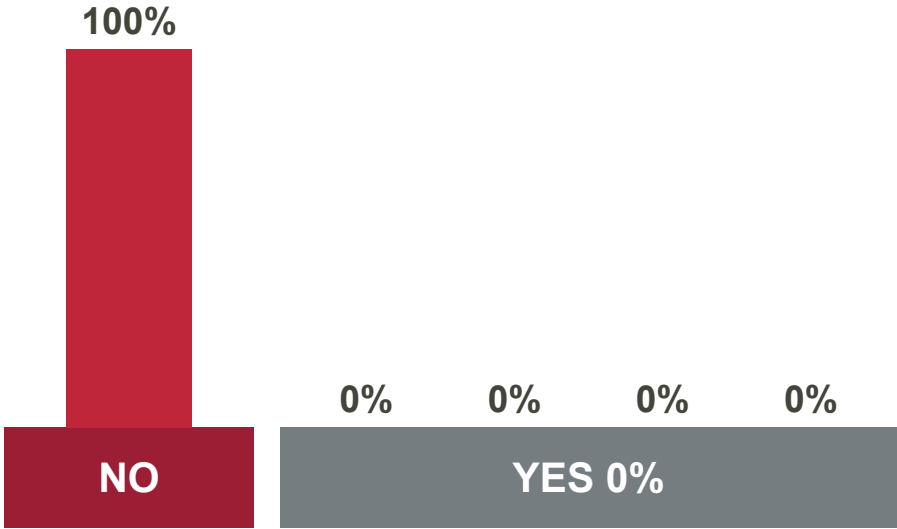
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

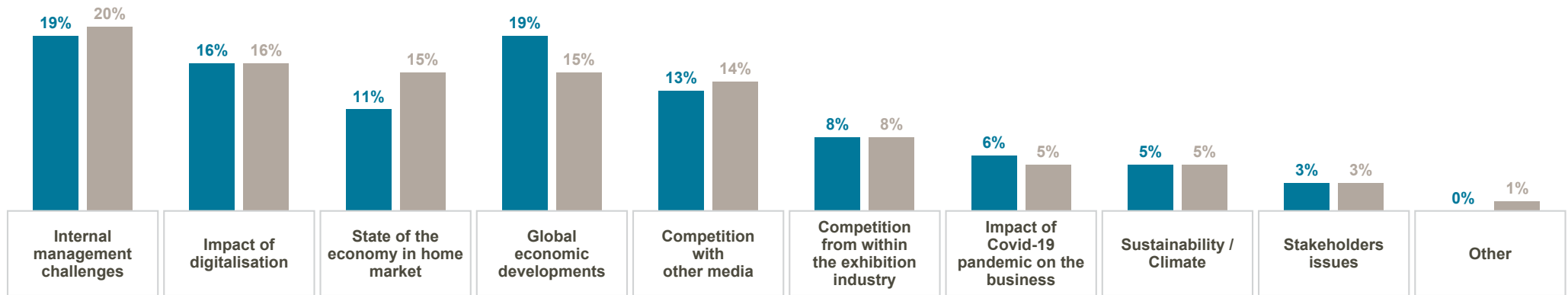




Most important business issues in the exhibition industry

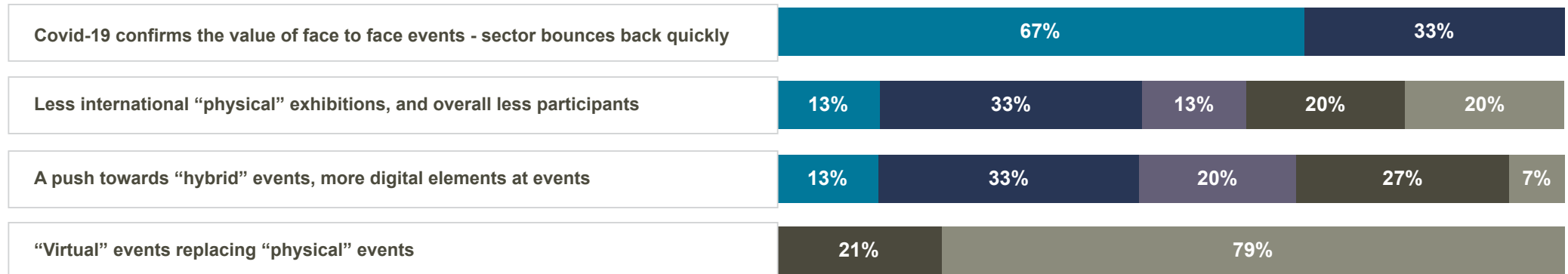
India

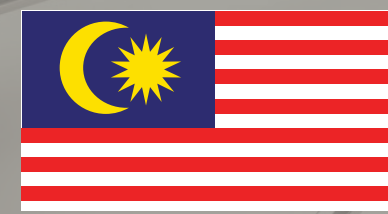
Global



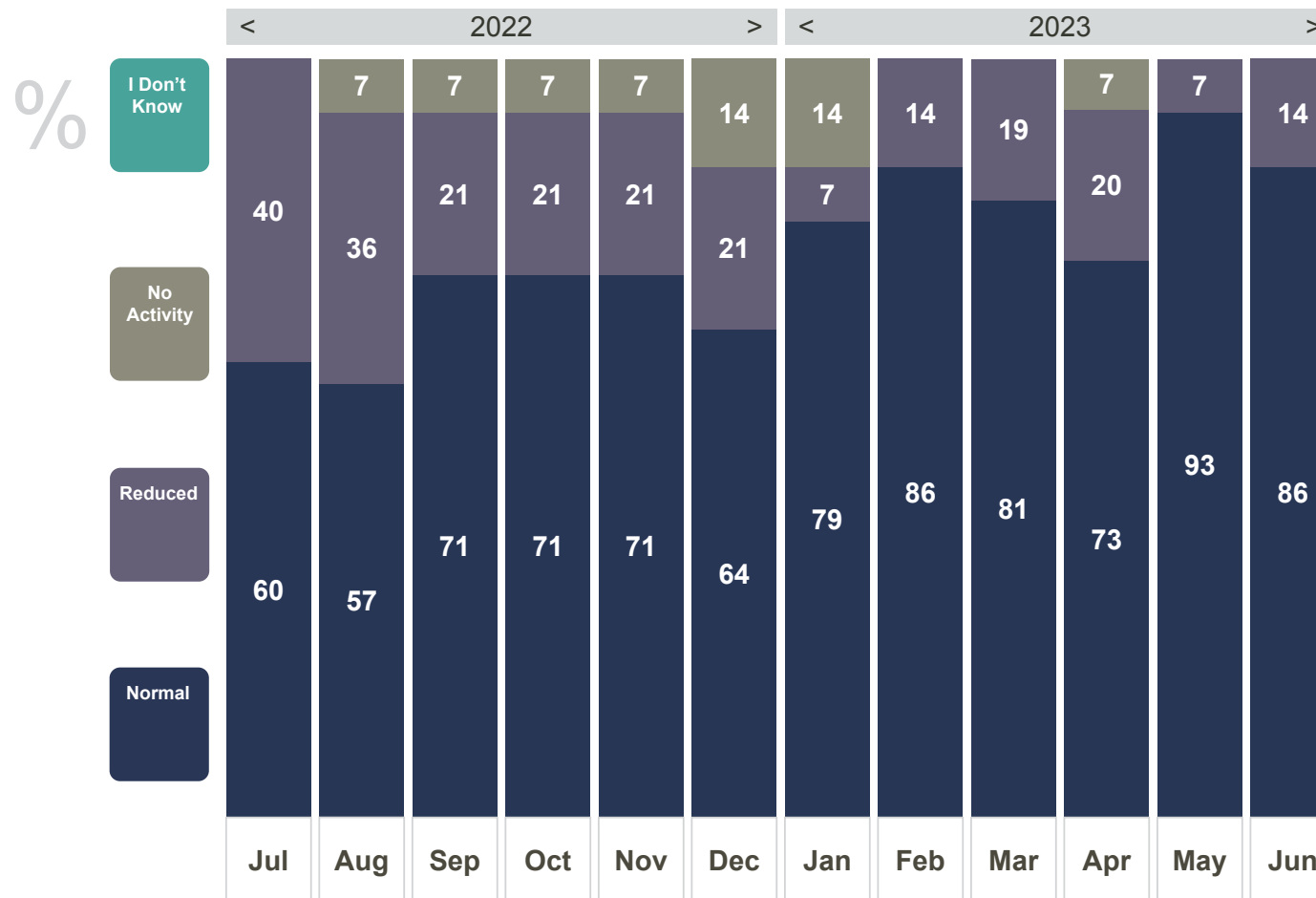
Format of exhibitions in the coming years

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

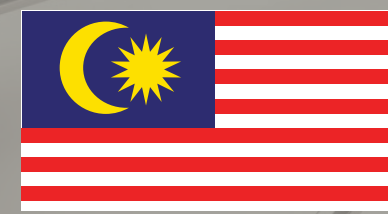




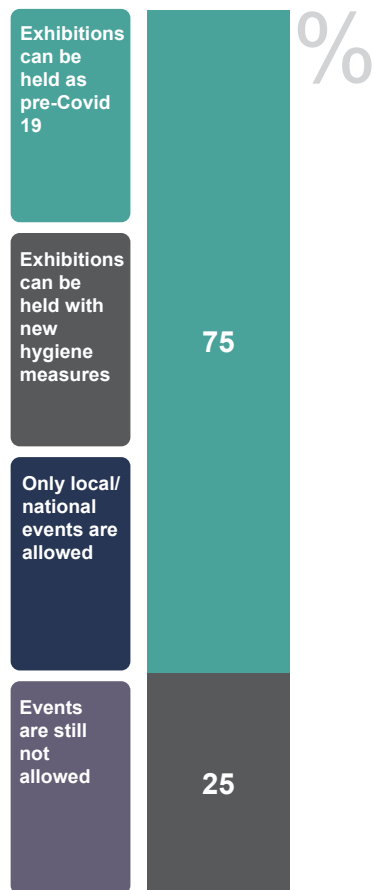
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



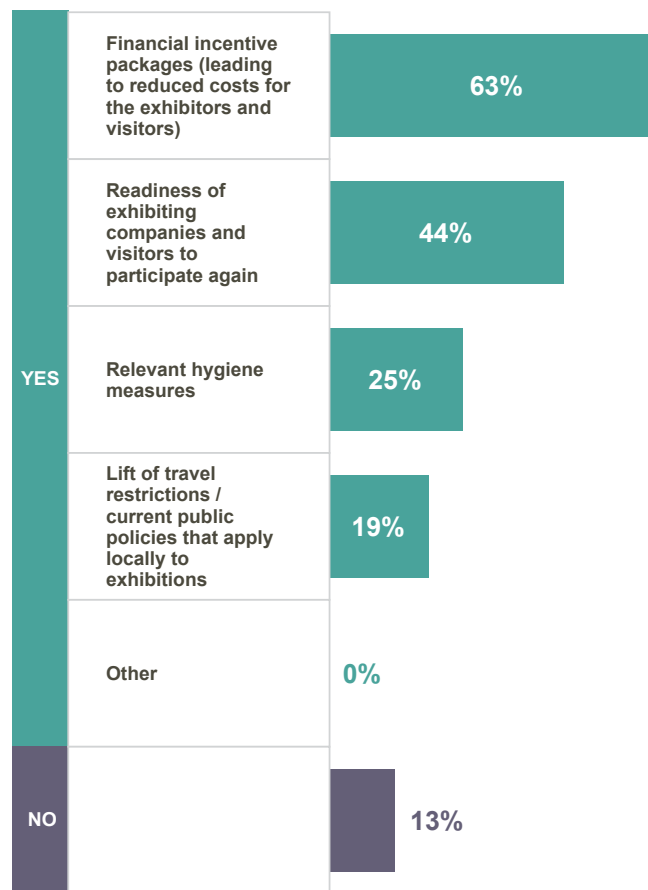
Detailed results for Malaysia



What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

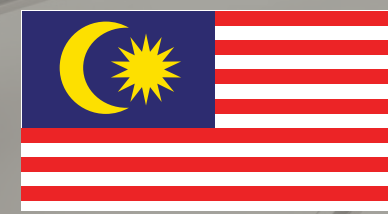


How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

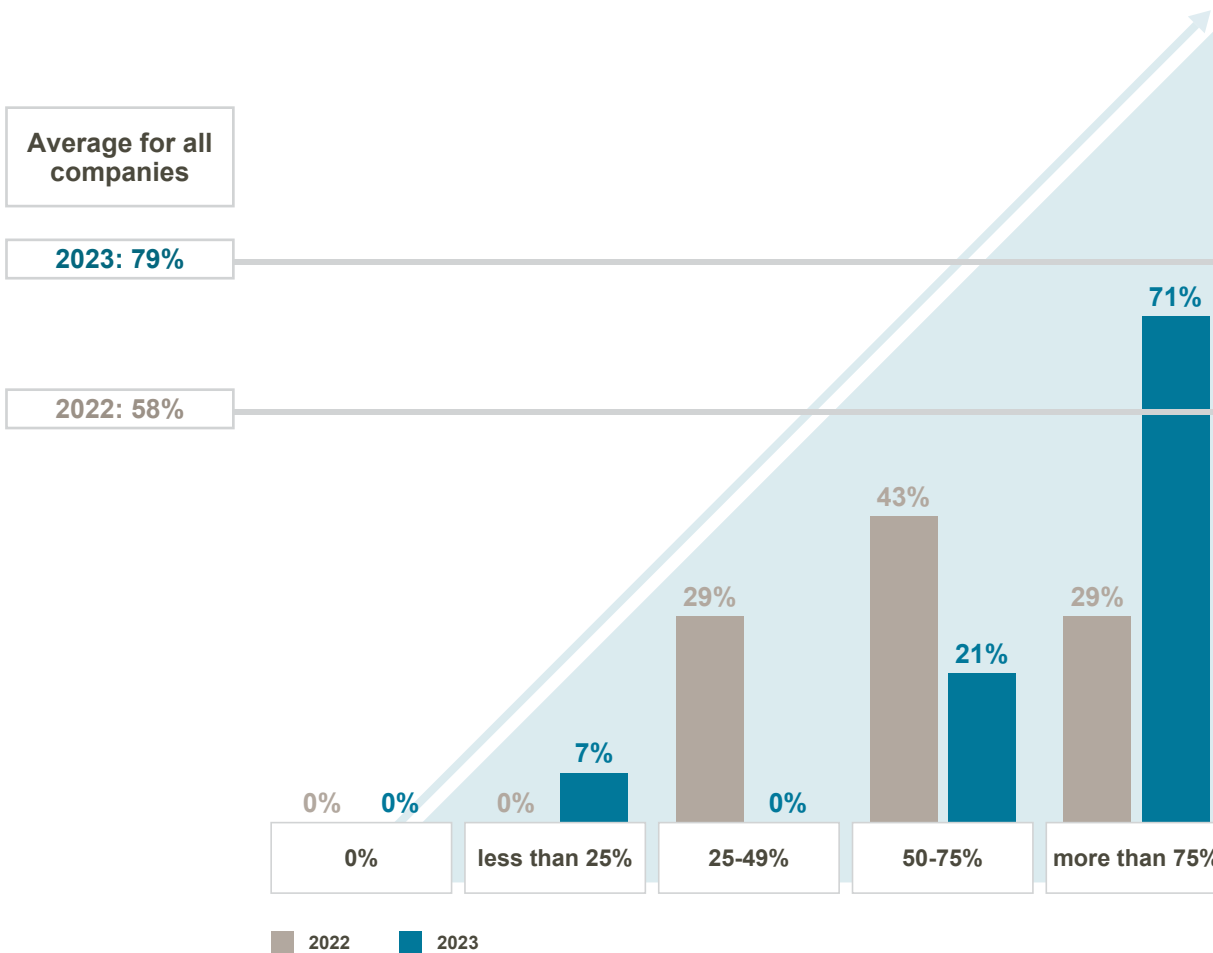


For organisers only (9 answers in total)

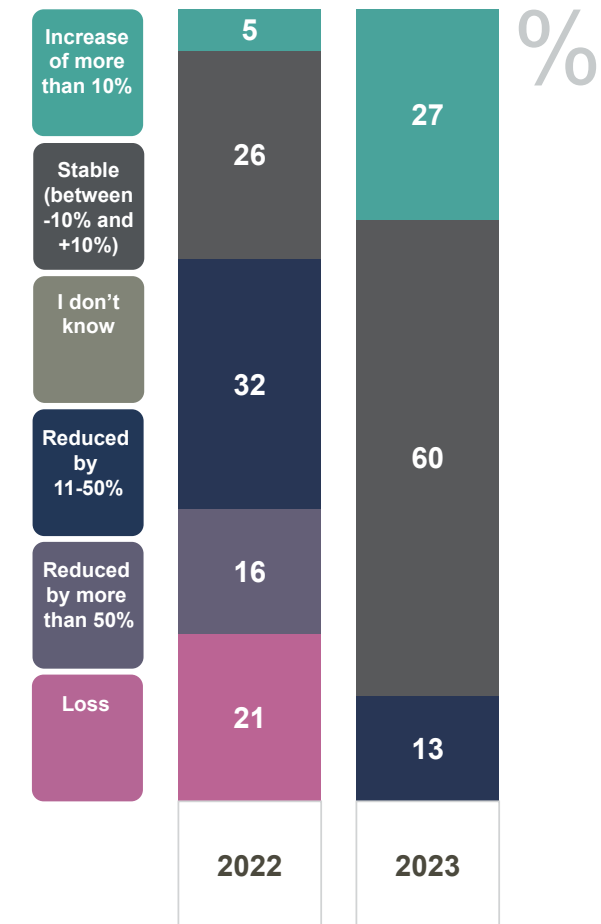
Detailed results for Malaysia

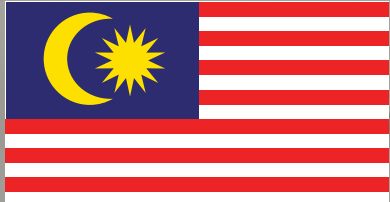


Revenue compared to 2019



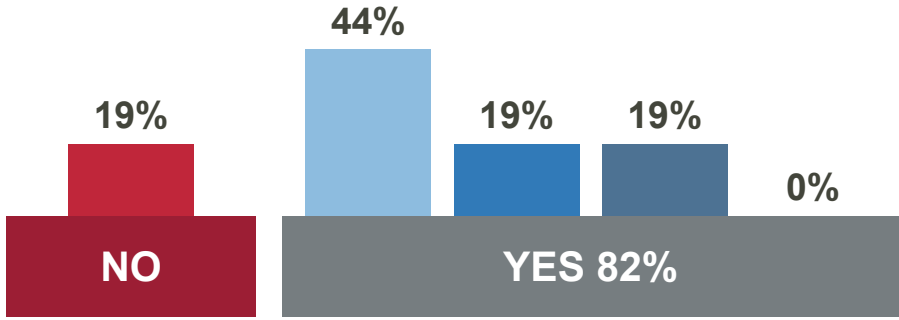
Operating Profits compared to 2019

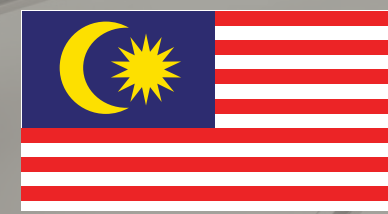




Did your company benefit from public financial support in 2022?

- No
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- Yes, for between 25% and 50% of our overall costs
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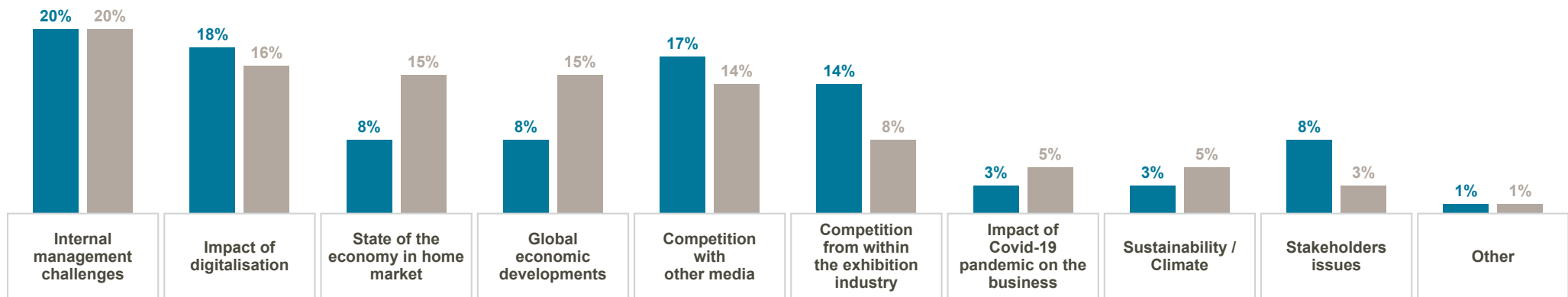




Most important business issues in the exhibition industry

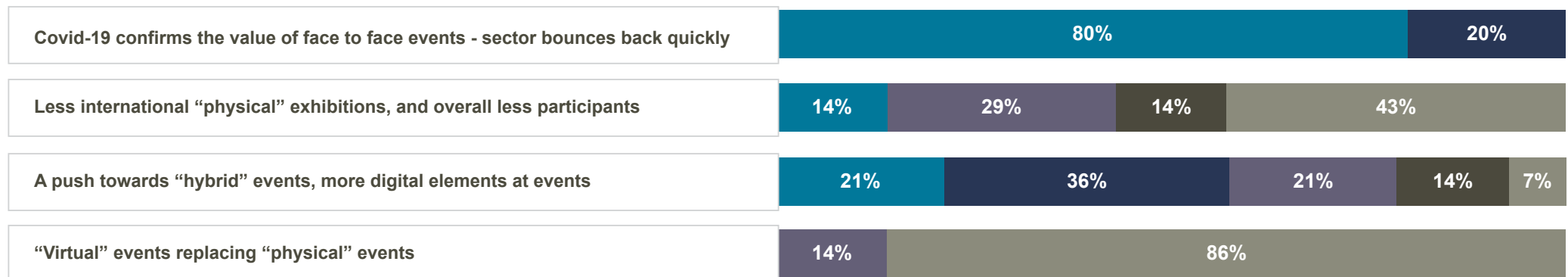
Malaysia

Global



Format of exhibitions in the coming years

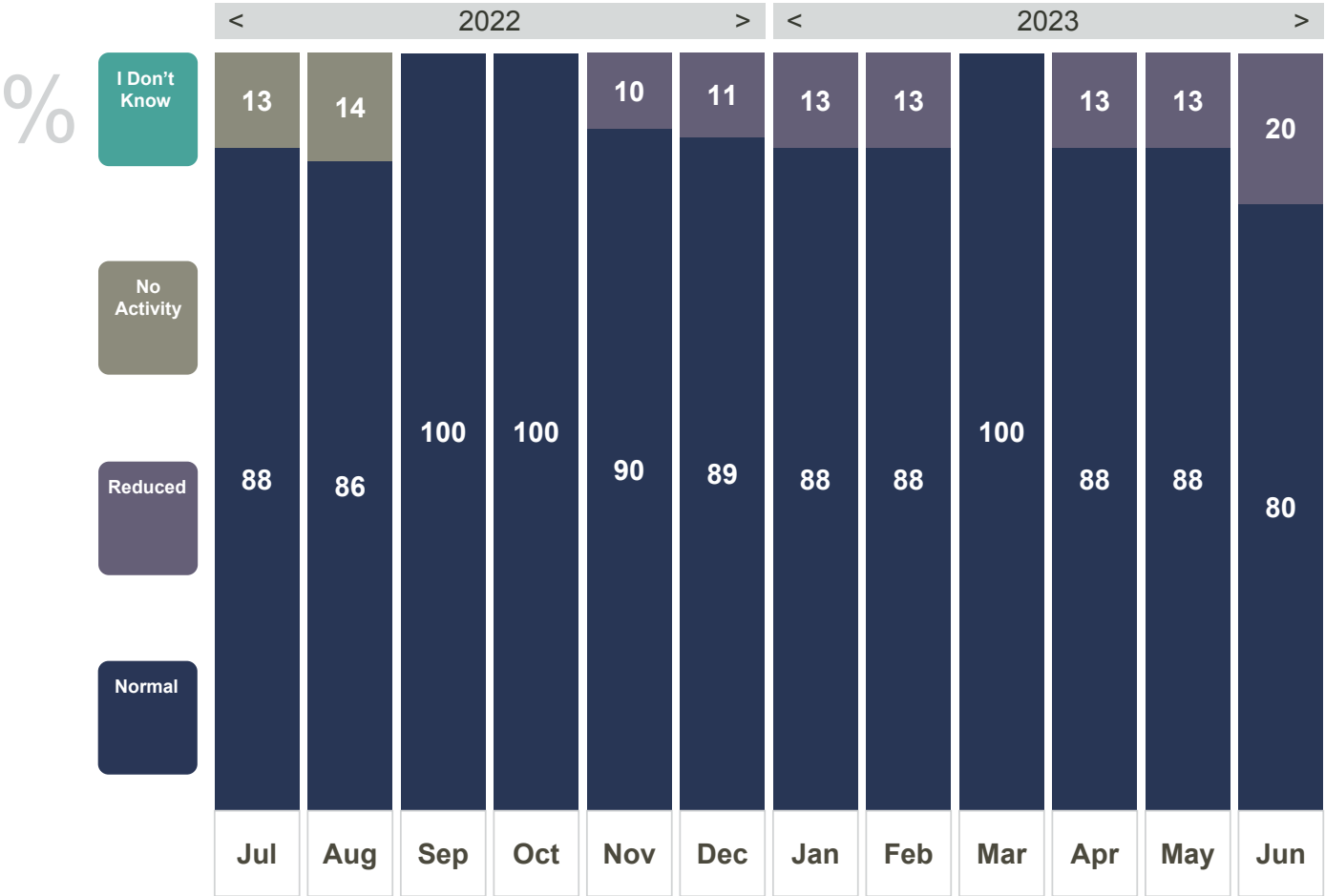
■ Yes, for sure
 ■ Most probably
 ■ Not sure
 ■ Not sure at all
 ■ Definitely not



Detailed results for Thailand



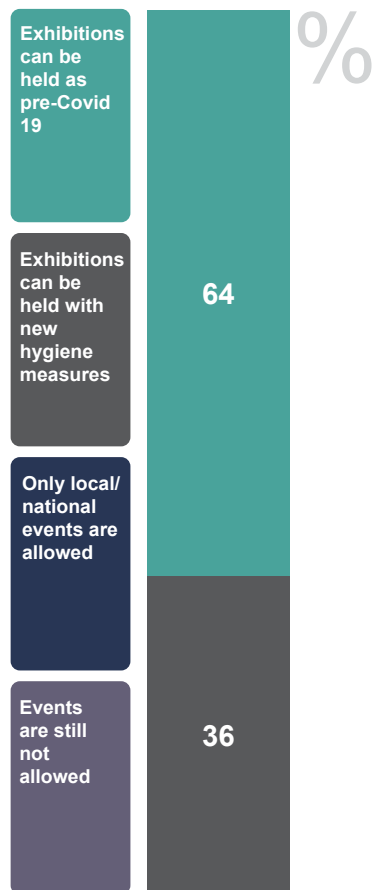
Situation of the industry operations in the 2nd half of 2022, and current predictions for the 1st half of 2023



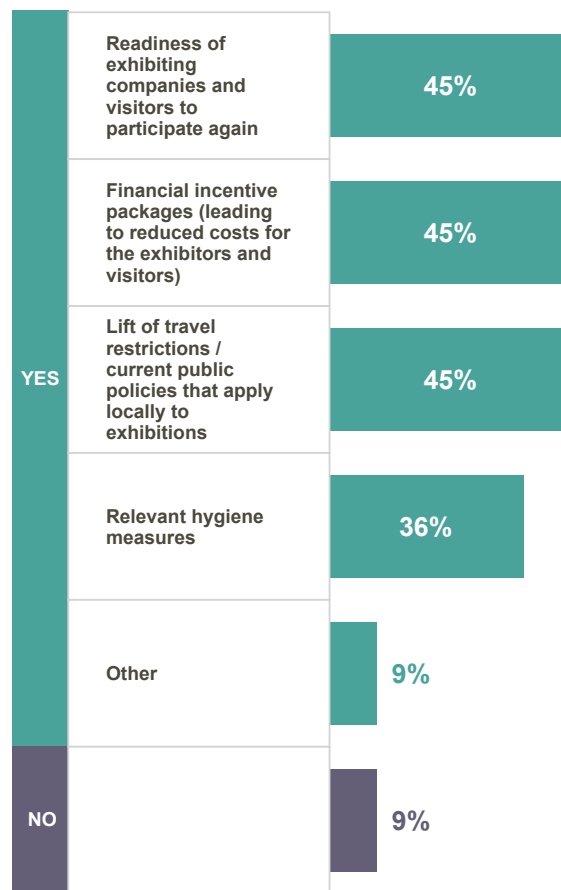
Detailed results for Thailand



What is the overall status of operations in your city?



Do you believe specific measures need to be implemented to help the recovery of exhibitions?

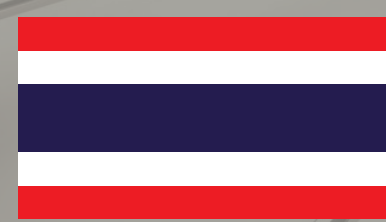


How do you assess the potential of “hosted buyers” packages whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies?

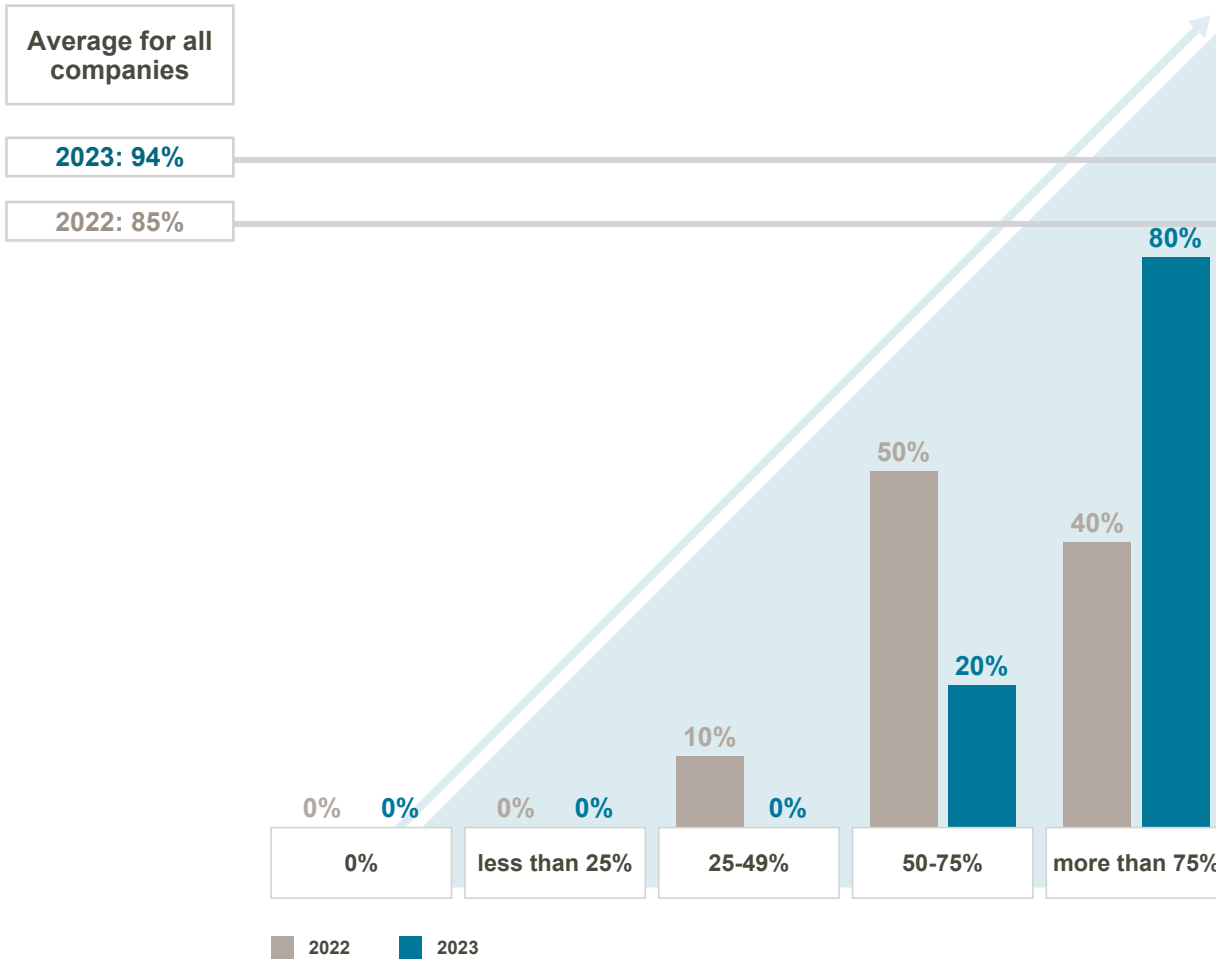


For organisers only (7 answers in total)

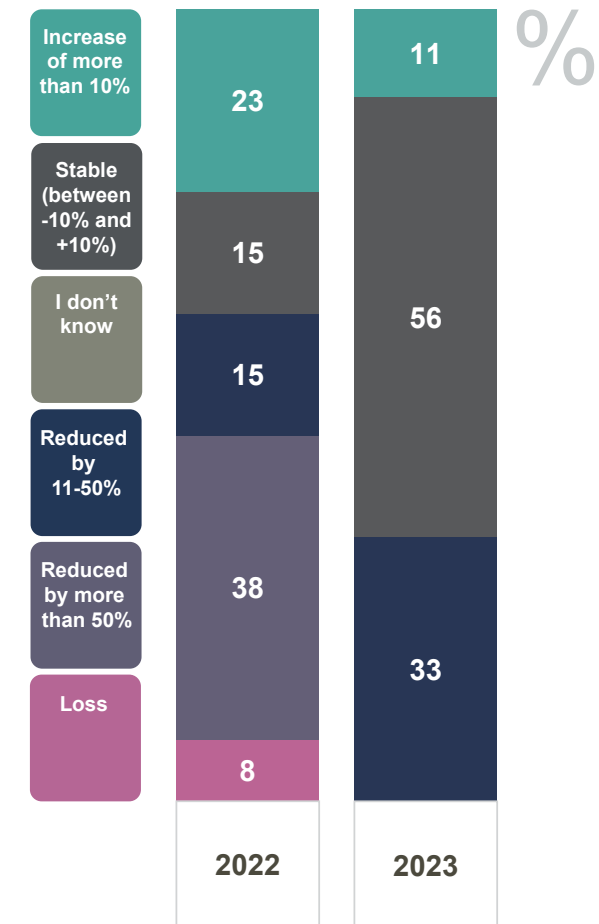
Detailed results for Thailand



Revenue compared to 2019



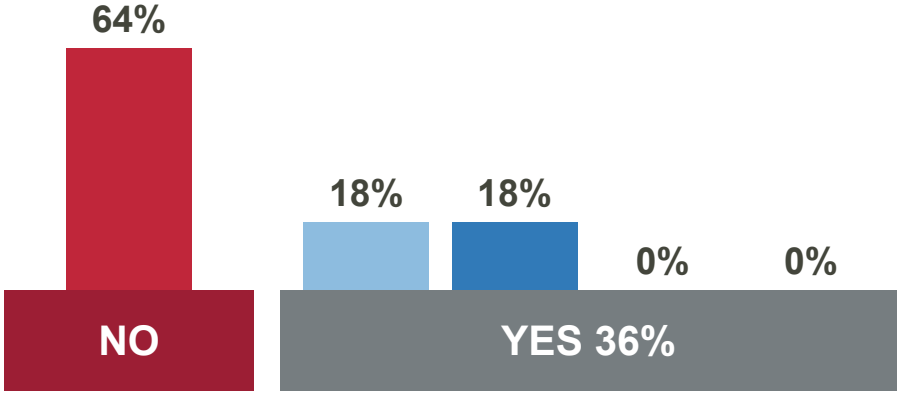
Operating Profits compared to 2019





Did your company benefit from public financial support in 2022?

- 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

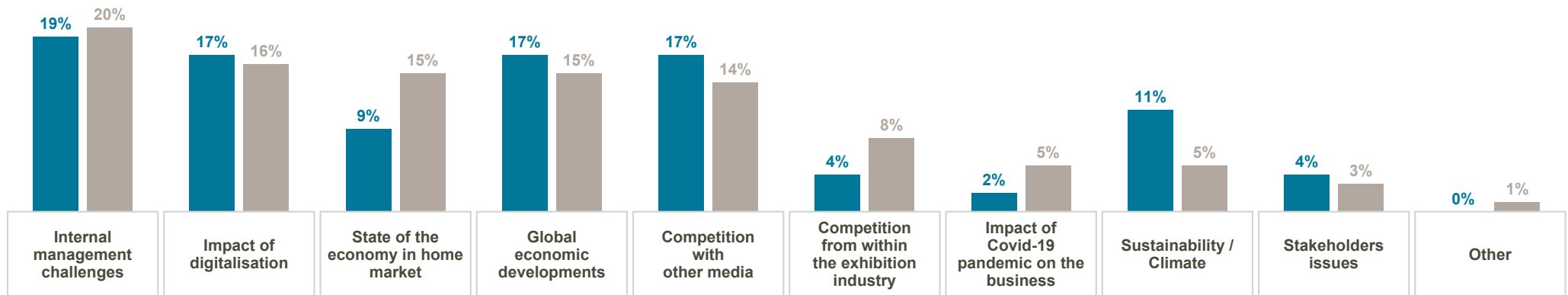




Most important business issues in the exhibition industry

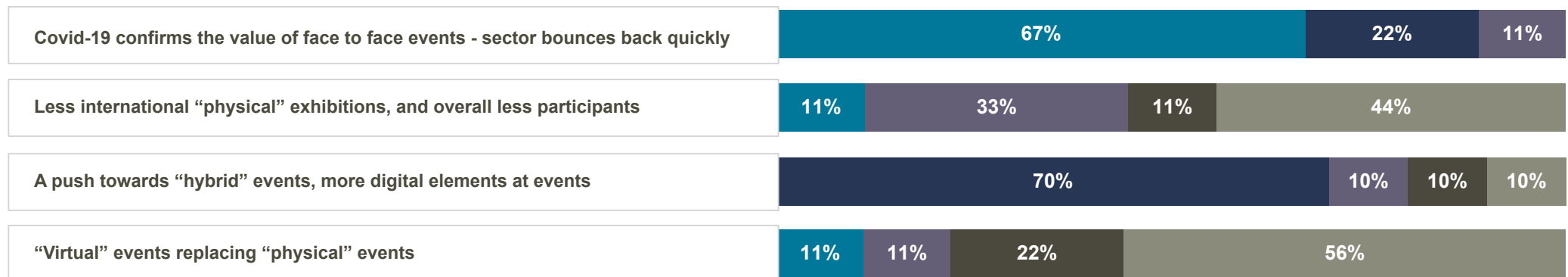
Thailand

Global



Format of exhibitions in the coming years

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



The Global Barometer survey has been constantly measuring the pulse of the exhibition industry for the past 15 years. This 30th survey was concluded in January 2023. It includes data from 367 companies in 56 countries and regions. The report delivers outlooks and analysis for 21 focus countries and regions. In addition, it analyses 5 aggregated regional zones.

The results show the pace of the industry's recovery from the global impact of the COVID-19 pandemic. This Barometer presents strong evidence that – in most parts of the world – the focus has moved away from re-opening and towards continuous growth where full recovery is expected in 2023 within the usual errors of margin. There remain however a few markets, most notably China, where full recovery is not anticipated in 2023.

The level of operations continues to improve globally: the proportion of companies declaring a “normal activity” gradually increased between January and December 2022 from 30% to 72% and it is expected to reach 80% in June 2023.

The “bounce back” of exhibitions has happened in 2022 and companies from most markets plan to deliver revenues close to their 2019 levels. Globally, on average and excluding China, the revenues for 2022 and 2023 represent 80% and 94% of 2019 levels.

When asked what specific measures could be implemented to support the ongoing recovery of exhibitions, 51% of respondents selected “Readiness of exhibiting companies and visitors to participate again”, while 45% selected “Financial incentive packages”.

Overall, 69% of companies received no public financial support in 2022, but for the half of those that did, this aid represented less than 10% of their overall costs.

In terms of operating profit, around half of the companies are declaring an increase or stable level for 2022 compared to 2019 levels and increasing to 7 out of 10 for 2023. Globally, only 4% of respondents expect a loss for 2023, compared to 11% for 2022.

Exhibition organizers participating in this edition of the Barometer also evaluated the “hosted buyers” packages, whereby the organiser invites and hosts selected visitors in return for a guaranteed amount of business meetings with exhibiting companies.

Global results indicate that half of the respondents apply this concept, and while one in four of them are happy with the programmes, two-thirds declare having mixed results. Results vary significantly between specific markets, providing insights into opportunities for hosted buyer programmes.

The latest results confirm that the “Impact of the COVID-19 pandemic on the business” is now the least pressing issue, globally speaking: only 5% of companies mark it as one of the most important (compared to 11% six months ago and 19% twelve months ago). The most pressing business issue declared in this edition is “Internal management challenges” (20% of answers globally and the main one in all regions, and most markets). The “Impact of digitalisation” comes as the second most important issue globally (16% of answers), followed by “State of the economy in the home market” and “Global economic developments” (both 15% of answers).

The analysis of the trend around top business issues over the 2015-2022 period identifies several important shifts:

- “Impact of digitalisation/Competition with other media” now ranks as the leading issue, with 30% of answers (compared with 14% in 2015).
- “Global economic developments/State of the economy in the home market” have dropped from the top spot it held for years (44% of answers in 2015) to 22% in 2021 and 29% in 2022.
- “Internal management challenges” has increased from 14% in 2015 to 20% in 2022.

In parallel, “Sustainability/climate and other stakeholders’ issues” has doubled from 4% of answers in 2015 to 8% in 2022, while “Competition from within the exhibition industry” has dropped considerably, from 20% in 2015 to less than 8% in 2022.

In relation to future exhibition formats, the global results indicate that: 88% of respondents (compared to 80% a year ago and 64% two years ago) agree that “COVID-19 confirms the value of face-to-face events” and anticipate the sector to bounce back quickly.

- 26% (compared to 44% and 63% previously) believe there will be “Less international ‘physical’ exhibitions and, overall, less participants”.

- 57% (compared to 73% and 80% previously) believe there is “A push towards hybrid events, more digital elements at events”.
- 5% (compared to 11% and 14% previously) agree that “Virtual events are replacing physical events”.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION! THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2023 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 367 (in 56 countries/regions)

North America	26	Europe	120	Middle East & Africa	56
Canada	1	Belgium	3	Bahrain	5
Mexico	12	Bulgaria	1	Egypt	1
USA	13	Croatia	1	Kuwait	1
		Czech Republic	1	Lebanon	1
Central & South America	62	Finland	2	Oman	1
Argentina	12	France	15	Qatar	5
Bolivia	2	Georgia	1	Saudi Arabia	17
Brazil	17	Germany	13	South Africa	12
Chile	12	Greece	17	United Arab Emirates	12
Colombia	11	Hungary	1	Zimbabwe	1
Costa Rica	1	Italy	14		
Ecuador	2	Netherlands	2	Asia-Pacific	103
El Salvador	1	Poland	1	Australia	17
Panama	1	Portugal	4	China	19
Peru	1	Romania	1	India	15
Uruguay	2	Slovenia	1	Indonesia	3
		Spain	12	Japan	9
		Sweden	3	Malaysia	16
		Switzerland	1	Philippines	2
		Turkey	11	Singapore	7
		Ukraine	1	South Korea	4
		United Kingdom	14	Thailand	11

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