Messe Frankfurt Middle East

The effects of Covid-19

GRS Research & Strategy – 15th July 2020
The Effects of Covid-19

About the project

The goal of this project was to investigate how Covid-19 affected businesses and the behaviour of the stakeholders of Messe Frankfurt Middle East.

The research was addressed to all former visitors and exhibitors of exhibitions organized by Messe Frankfurt Middle East (last two editions of each show).

A total of 4,036 professionals from 130+ countries took part in this research.

Data were collected between 22-30 June 2020 via CAWI methodology (online survey distributed via email).
The panel
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Top 15 countries
1. UNITED ARAB EMIRATES
2. SAUDI ARABIA
3. INDIA
4. PAKISTAN
5. UNITED KINGDOM
6. TURKEY
7. IRAN
8. UNITED STATES OF AMERICA
9. NIGERIA
10. EGYPT
11. GERMANY
12. ITALY
13. KUWAIT
14. FRANCE
15. CHINA
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- Automechanika Dubai: 20.4%
- Automechanika Jeddah: 1.5%
- Automechanika Riyadh: 1.7%
- Beautyworld Middle East: 23.6%
- Beautyworld Saudi Arabia: 1.7%
- Hardware+Tools Middle East: 1.8%
- Intersec Middle East: 28.3%
- Intersec Saudi Arabia: 0.1%
- Light Middle East: 5.4%
- Materials Handling Middle East: 1.4%
- Middle East Cleaning Technology Week: 2.8%
- Paperworld Middle East: 9.2%
- Prolight Sound Middle East: 1.6%
- SPS Middle East: 0.6%

- Total: 27.1%
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Seniority of respondents

- Business Owner: 36.3%
- Senior Management: 27.6%
- Middle Management: 19.3%
- C-Level: 9.8%
- Other: 7.0%
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Company size (number of employees)

Large enterprise: 250 employees or more
23.2%

Microenterprise: 1 to 9 employees
23.5%

Medium-sized enterprise: 50 to 249 employees
22.9%

Small enterprise: 10 to 49 employees
30.3%
Traveling
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Company’s travel policy

What’s your company’s policy about travelling abroad for business?

- No policy, will follow governments’ rules and recommendations: 51.1%
- Our company allows it already: 13.1%
- It will be allowed before the end of the year: 8.0%
- It will be allowed in the coming weeks: 5.2%
- Other: 3.1%
- Travelling abroad will not be allowed before the end of 2020: 19.5%

77% will be “allowed” to travel abroad before the end of this year.
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But only 50% of those “allowed” to travel abroad for business plan to do so by airplane in 2020.
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Likelihood to travel by airplane in 2020

Are you planning to travel by airplane for business this year?
(this question was not asked to those who said that travelling for business will not be allowed before the end of 2020 in the previous question)

- UAE: 40.9% Yes, 37.4% No, unlikely before January 2021, 9.3% No, unlikely before June 2021, 12.4% N/A
- Asia: 46.3% Yes, 38.6% No, unlikely before January 2021, 10.5% No, unlikely before June 2021
- GCC: 47.4% Yes, 37.4% No, unlikely before January 2021, 7.6% No, unlikely before June 2021
- Middle East: 57.8% Yes, 28.6% No, unlikely before January 2021, 8.2% No, unlikely before June 2021
- Africa: 60.7% Yes, 26.5% No, unlikely before January 2021, 7.0% No, unlikely before June 2021
- Other: 61.7% Yes, 29.6% No, unlikely before January 2021, 8.7% No, unlikely before June 2021
- Europe: 61.8% Yes, 31.1% No, unlikely before January 2021

Yes
No, unlikely before January 2021
No, unlikely before June 2021
N/A (rarely travel by airplane for business)
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Likelihood to travel by airplane in 2020

Are you planning to travel by airplane for business this year?
(this question was not asked to those who said that travelling for business will not be allowed before the end of 2020 in the previous question)

- Business Owner: 58.1% Yes, 31.4% No, unlikely before January 2021, 8.5% No, unlikely before June 2021, 1.0% N/A (rarely travel by airplane for business)
- C-Level: 62.4% Yes, 28.7% No, unlikely before January 2021, 8.5% No, unlikely before June 2021, 0.5% N/A (rarely travel by airplane for business)
- Senior Management: 49.8% Yes, 36.9% No, unlikely before January 2021, 8.5% No, unlikely before June 2021, 6.8% N/A (rarely travel by airplane for business)
- Middle Management: 37.9% Yes, 39.4% No, unlikely before January 2021, 9.4% No, unlikely before June 2021, 13.3% N/A (rarely travel by airplane for business)
- Other: 35.5% Yes, 36.5% No, unlikely before January 2021, 11.3% No, unlikely before June 2021, 16.7% N/A (rarely travel by airplane for business)
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Likelihood to travel by airplane in 2020

Are you planning to travel by airplane for business this year?
(this question was not asked to those who said that travelling for business will not be allowed before the end of 2020 in the previous question)

- Microenterprise: 1 to 9 employees
  - Yes: 56.4%
  - No, unlikely before January 2021: 31.1%
  - N/A (rarely travel by airplane for business)

- Small enterprise: 10 to 49 employees
  - Yes: 52.8%
  - No, unlikely before January 2021: 33.3%
  - N/A (rarely travel by airplane for business)

- Medium-sized enterprise: 50 to 249 employees
  - Yes: 48.7%
  - No, unlikely before January 2021: 36.0%
  - No, unlikely before June 2021: 8.4%

- Large enterprise: 250 employees or more
  - Yes: 44.2%
  - No, unlikely before January 2021: 39.2%
  - No, unlikely before June 2021: 9.1%
  - No, unlikely before June 2021: 7.5%
Importance of exhibitions
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Importance of exhibitions post Covid-19

Having experienced lockdown and travel restrictions as a result of the Covid-19 pandemic, exhibitions moving forward will be:

- Even more important than in the past: 30.9%
- Just as important as in the past: 37.6%
- Less important than in the past: 24.1%
- Not necessary anymore: 7.4%
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Importance of exhibitions post Covid-19

Having experienced lockdown and travel restrictions as a result of the Covid-19 pandemic, exhibitions moving forward will be:

- **MENA**: 8.7% Even more important than in the past, 18.1% Just as important as in the past, 36.4% Less important than in the past, 36.7% Not necessary anymore
- **Africa**: 18.1% Even more important than in the past, 44.4% Just as important as in the past, 33.5% Less important than in the past
- **Asia & Pacific**: 9.5% Even more important than in the past, 22.3% Just as important as in the past, 35.7% Less important than in the past, 32.4% Not necessary anymore
- **GCC**: 6.9% Even more important than in the past, 27.1% Just as important as in the past, 35.8% Less important than in the past, 30.1% Not necessary anymore
- **Europe**: 26.7% Even more important than in the past, 42.1% Just as important as in the past, 26.5% Less important than in the past
- **Americas**: 7.5% Even more important than in the past, 28.3% Just as important as in the past, 44.2% Less important than in the past, 20.0% Not necessary anymore

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Microenterprise: 1 to 9 employees
- 7.2% Even more important than in the past, 20.6% Just as important as in the past, 37.8% Less important than in the past, 34.4% Not necessary anymore

Small enterprise: 10 to 49 employees
- 7.5% Even more important than in the past, 25.1% Just as important as in the past, 38.2% Less important than in the past, 29.2% Not necessary anymore

Medium-sized enterprise: 50 to 249 employees
- 7.0% Even more important than in the past, 25.1% Just as important as in the past, 38.9% Less important than in the past, 29.1% Not necessary anymore

Large enterprise: 250 employees or more
- 7.2% Even more important than in the past, 27.2% Just as important as in the past, 36.9% Less important than in the past, 29.5% Not necessary anymore
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**When back to exhibitions**

*a) When are you planning to attend an exhibition next?*

*b) Will you participate as a Visitor or as an Exhibitor?*

<table>
<thead>
<tr>
<th>Period</th>
<th>Visitor</th>
<th>Exhibitor</th>
<th>Both</th>
<th>Visitor &amp; Exhibitor</th>
<th>Not Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Q3-2020 (July-September)</td>
<td>6.3%</td>
<td>1.8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Q4-2020 (October-December)</td>
<td></td>
<td></td>
<td>6.6%</td>
<td>17.2%</td>
<td></td>
</tr>
<tr>
<td>In Q1-2021 (January-March)</td>
<td></td>
<td></td>
<td>5.1%</td>
<td>17.7%</td>
<td></td>
</tr>
<tr>
<td>In Q2-2021 (April-May)</td>
<td></td>
<td></td>
<td>4.6%</td>
<td>12.0%</td>
<td></td>
</tr>
<tr>
<td>I am not planning to attend any exhibition in the next 12 months</td>
<td></td>
<td></td>
<td>5.1%</td>
<td>15.0%</td>
<td></td>
</tr>
</tbody>
</table>

Legend:
- Green: As an Exhibitor
- Purple: Both as a Visitor as well as an Exhibitor
- Blue: As a Visitor
- Red: I am not planning to attend any exhibition in the next 12 months
Attendance to exhibitions
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What will increase confidence towards exhibitions

What measures will make you more confident in attending an exhibition?

- Provision of facemasks and sanitiser gel for everyone: 37.7%
- Strict behavioural regulation at the show by the event organiser: 35.1%
- Wait until there is a vaccine/proper treatment for Covid-19: 34.7%
- Guarantees about physical distancing at the show/restrictions in the number of attendees: 34.6%
- No new cases of Covid-19 in the city/country in which the exhibition will take place: 34.2%
- No government restrictions: 23.8%
- A well pre-defined list of meetings to make the visit short and effective: 22.3%
- No need for any measures, I am confident in attending an exhibition: 8.9%
- I am NOT comfortable in attending an exhibition and nothing will change this feeling: 6.9%
Confidence about countries
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Confidence about countries

Which of the following countries/regions you feel comfortable in attending exhibition?

- Dubai: 76.9%
- Germany: 41.5%
- Saudi Arabia: 19.1%
- France: 16.9%
- Italy: 15.2%
- USA: 15.2%
- China: 12.1%
- India: 10.7%
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Confidence about countries

Which of the following countries/regions you feel comfortable in attending exhibition?

<table>
<thead>
<tr>
<th>Region</th>
<th>Africa</th>
<th>Americas</th>
<th>Asia &amp; Pacific</th>
<th>Europe</th>
<th>GCC</th>
<th>MENA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dubai</td>
<td>89.6%</td>
<td>67.2%</td>
<td>67.2%</td>
<td>65.0%</td>
<td>84.7%</td>
<td>84.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>39.0%</td>
<td>44.5%</td>
<td>35.1%</td>
<td>63.5%</td>
<td>35.4%</td>
<td>46.3%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>10.0%</td>
<td>14.8%</td>
<td>14.6%</td>
<td>12.4%</td>
<td>29.1%</td>
<td>12.2%</td>
</tr>
<tr>
<td>France</td>
<td>17.5%</td>
<td>21.1%</td>
<td>13.5%</td>
<td>29.6%</td>
<td>13.9%</td>
<td>13.9%</td>
</tr>
<tr>
<td>Italy</td>
<td>9.6%</td>
<td>20.3%</td>
<td>13.4%</td>
<td>25.5%</td>
<td>12.0%</td>
<td>16.9%</td>
</tr>
<tr>
<td>USA</td>
<td>17.9%</td>
<td>56.3%</td>
<td>16.8%</td>
<td>13.3%</td>
<td>12.0%</td>
<td>13.1%</td>
</tr>
<tr>
<td>China</td>
<td>16.3%</td>
<td>7.0%</td>
<td>18.8%</td>
<td>9.7%</td>
<td>8.0%</td>
<td>18.4%</td>
</tr>
<tr>
<td>India</td>
<td>11.2%</td>
<td>4.7%</td>
<td>22.3%</td>
<td>3.7%</td>
<td>9.8%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>
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