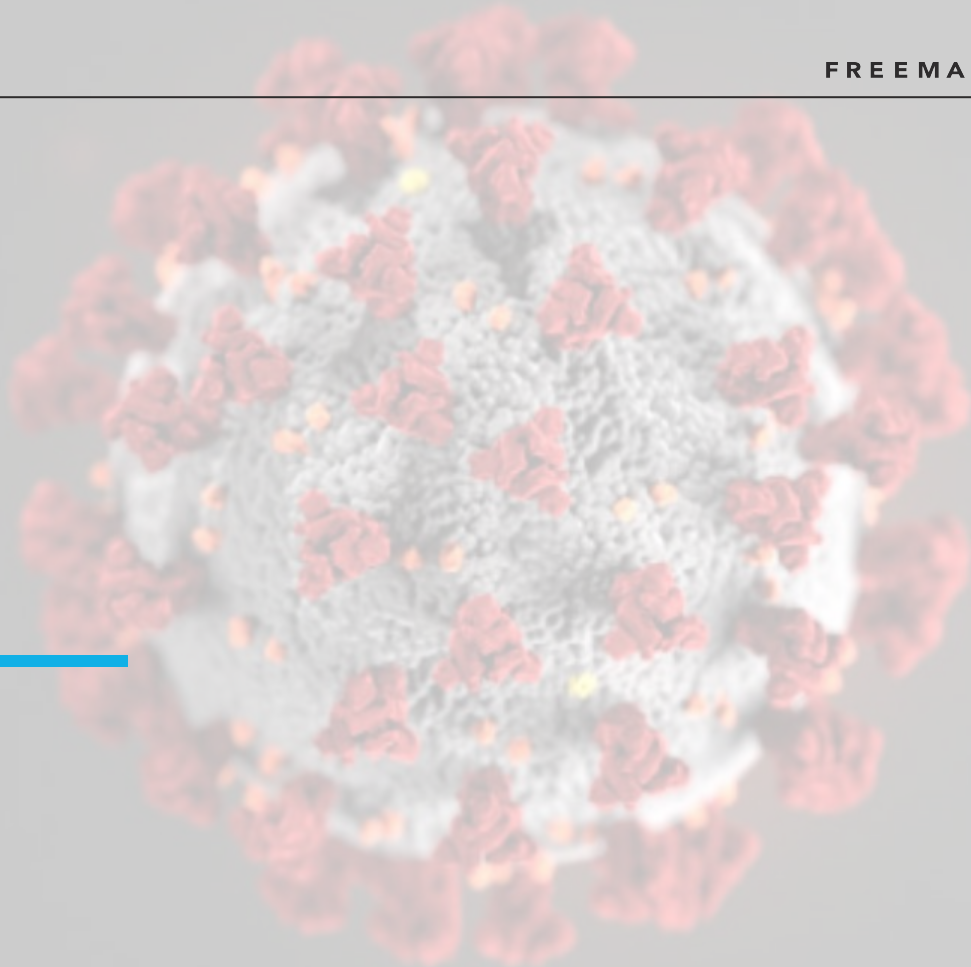




July 9, 2020

COVID-19 Sentiment: Combined Audiences

July 2020





Profile of Respondents

(Mid-large Convention/Exhibition attendees)

Number mailed: 184,164
 Number of responses: 3,572
 Response rate: 1.9%
 Margin of error: ±1.6%

Top Primary Types of Businesses

Business Services	15%
Food/Beverage	14%
Communications/IT	11%
Medical/Healthcare	9%
Consumer Goods/Retail	8%
Education	7%
Building/Construction	6%

Job Title/Function

Corporate	43%
C-Level	8%
Owner/Partner/President	18%
SVP/EVP	2%
Sales/Business Development	14%
Marketing/Advertising	5%
Technical	9%
Healthcare	6%

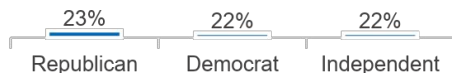
Role in Event Attendance

I am the decision maker	51%
I have significant influence in getting my attendance approved	32%

Gender

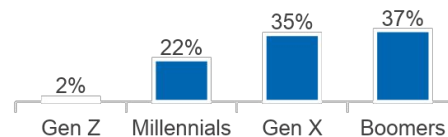
Male	67%
Female	30%

Political Affiliation



Age

Average Age: 49



Geographical Distribution

Northeast	21%
Southeast	13%
Midwest	15%
Southwest	8%
West	31%
International	12%



Methodology

The surveys were conducted online.

All respondents were given the option to opt-in to a drawing for a \$100 Amazon Gift Card. 5 winners per survey were randomly selected.

	Attendees	Exhibitors	Organizers	Brand Marketers
Sample Size	175,233	89,223	5,673	20,491
Number of Responses	2,610	3,266	163	144
Response Rate (excluding undeliverable emails)	1.5%	3.7%	2.9%	0.7%
Maximum Statistical Error @95% Confidence	±1.9%	±1.68%	±7.6%	±8.1%
Survey Period	May 28 – June 4	June 8 – 16	June 3 – 11	May 14 – 26

Impact of COVID-19

OVERALL SENTIMENT

HAVE ENOUGH RELIABLE INFORMATION TO MAKE DECISION

CONFIDENCE INDEX

LIKELIHOOD TO RETURN TO IN-PERSON EVENTS

TIMEFRAME FOR RETURNING

DECISION MAKING MILESTONES

AGREEMENT STATEMENTS

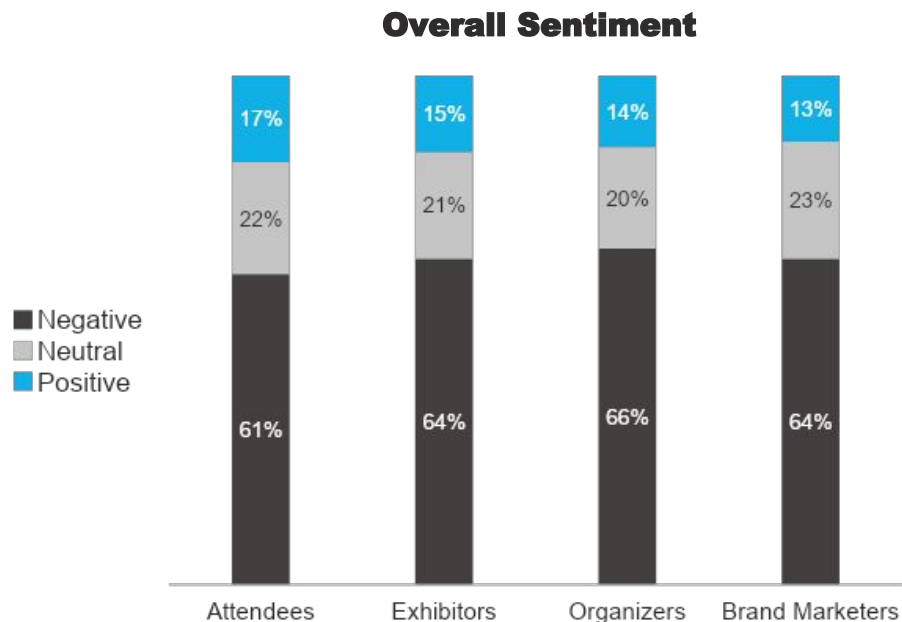
NUMBER OF EVENTS

DIGITAL/ONLINE CHALLENGES



COVID-19 Sentiment Research (Combined Audiences - July 2020)

Overall sentiment is negative across all event constituents

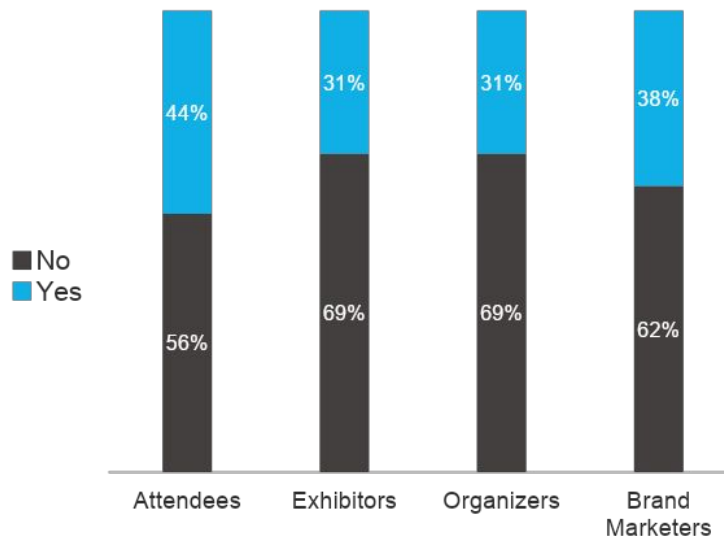


*What ONE word best describes your current emotional state towards the pandemic and executing an in-person event?
Does your company currently have enough reliable information to make a decision on when to host your next in-person event?*



Attendees more likely to feel they have sufficient information

Do You Have Enough Reliable Information to Make a Decision?

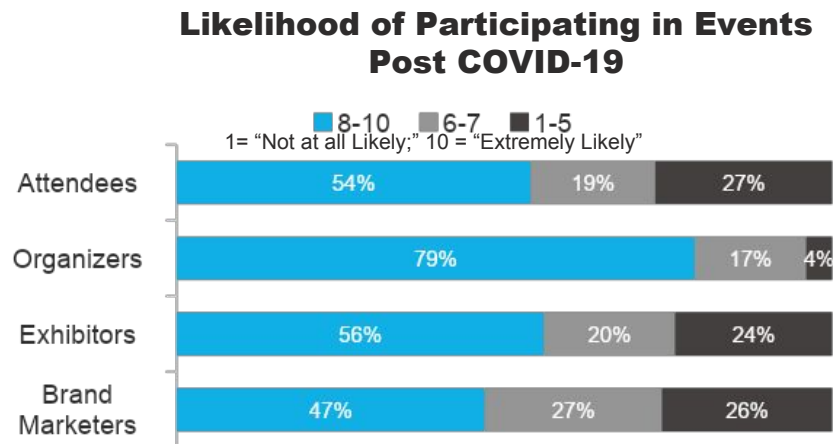
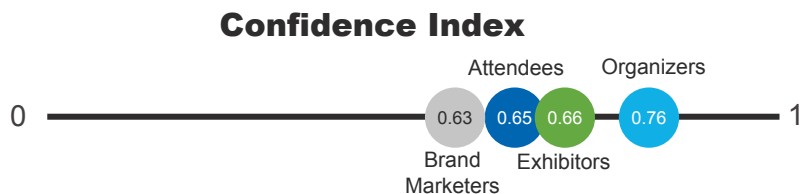


What ONE word best describes your current emotional state towards the pandemic and executing an in-person event?
Does your company currently have enough reliable information to make a decision on when to host your next in-person event?



COVID-19 Sentiment Research (July 2020)

Confidence index and likelihood of participating at an in-person event highest among organizers



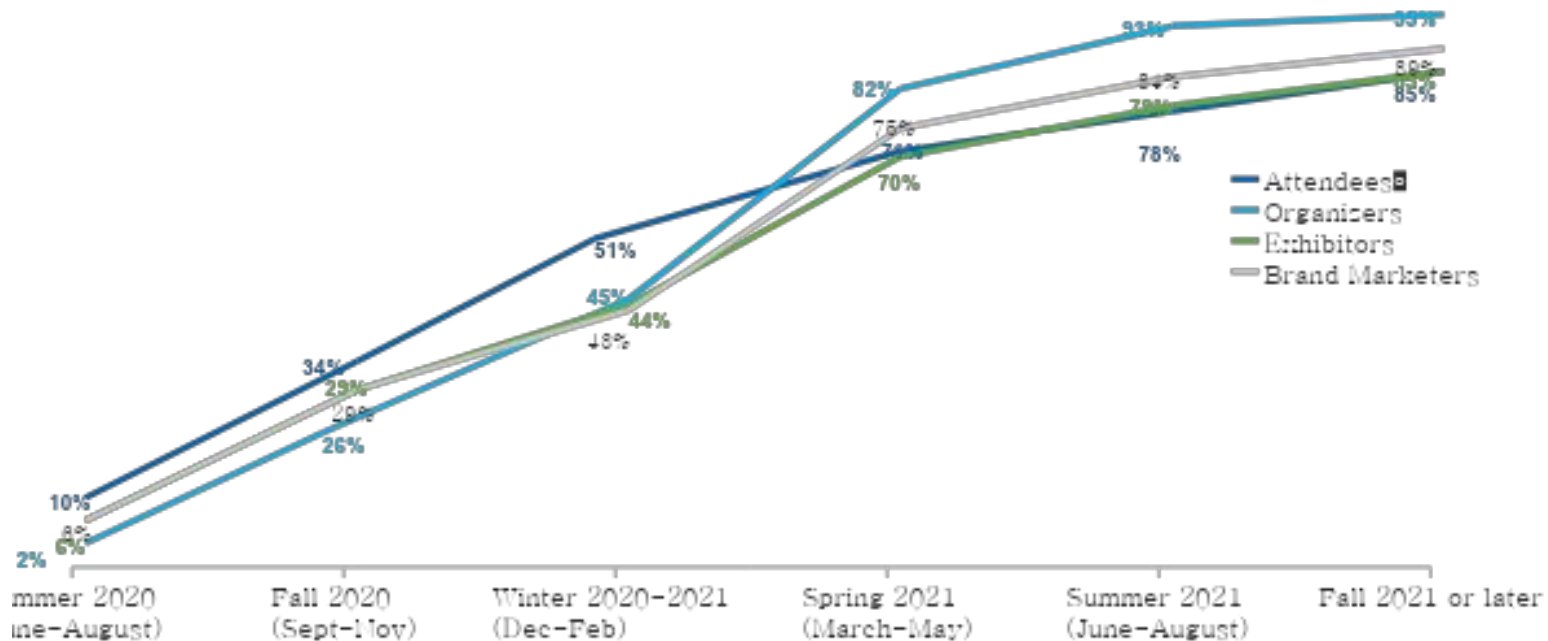
Once business-to-business (B2B) in-person events are permitted to occur and the coronavirus threat is lessened, how likely would you be to participate an in-person B2B convention or exhibition?



COVID-19 Sentiment Research (July 2020)

Organizers more likely than others to return to in-person events

Expected Timeframe For Participating in In-Person Events

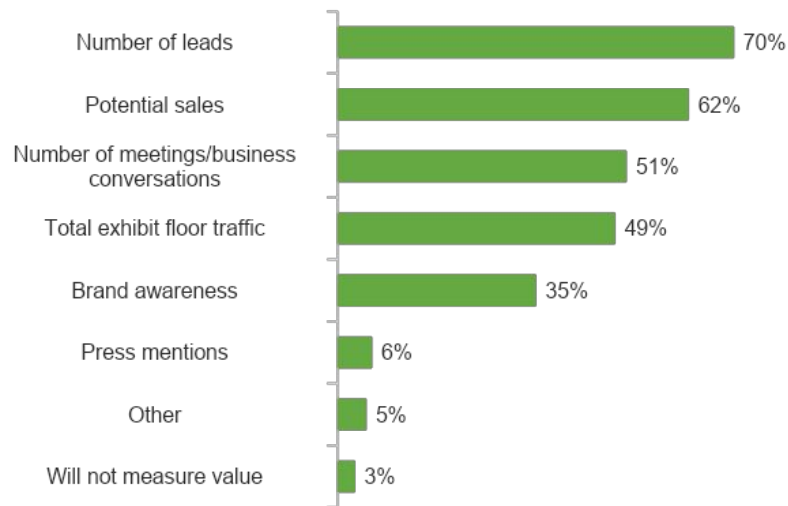


When do you see yourself participating in-person B2B events again?

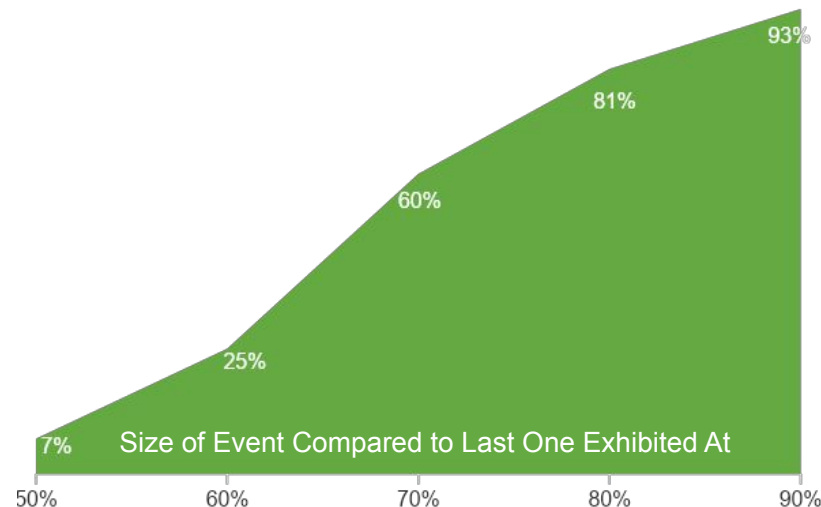


Post-COVID, exhibitors will continue to use the # of leads to measure value, and will need their events to maintain 70% of attendance for ROI

Ways of Measuring Value



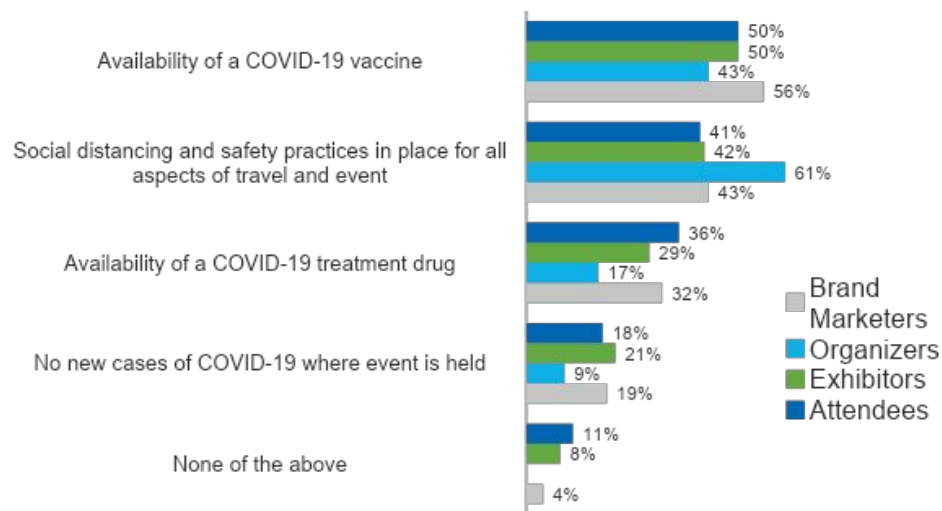
% For Which It Makes Sense to Participate at Specified Level of Attendance





Attendees, Exhibitors, and Brand Marketers largely align, Organizers place higher importance on social distancing/safety practices

Milestones Most Influential on Decision to Participate at In-Person Events Safety Factors

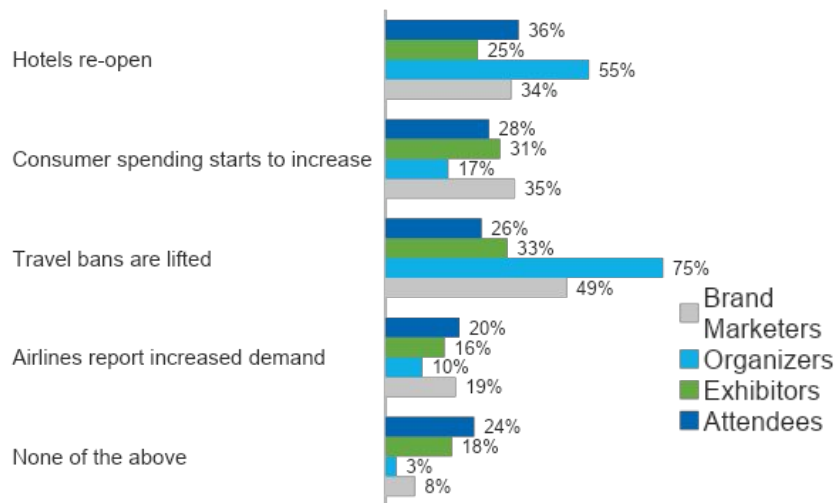


Which of the following milestones will have the MOST influence on your decision regarding when to host at in-person B2B events? Select up to 2 milestones in each section.



Attendees, Exhibitors, and Brand Marketers largely align, Organizers place higher importance on travel bans

Milestones Most Influential on Decision to Participate at In-Person Events Business/Economic Factors



Which of the following milestones will have the MOST influence on your decision regarding when to host at in-person B2B events? Select up to 2 milestones in each section.



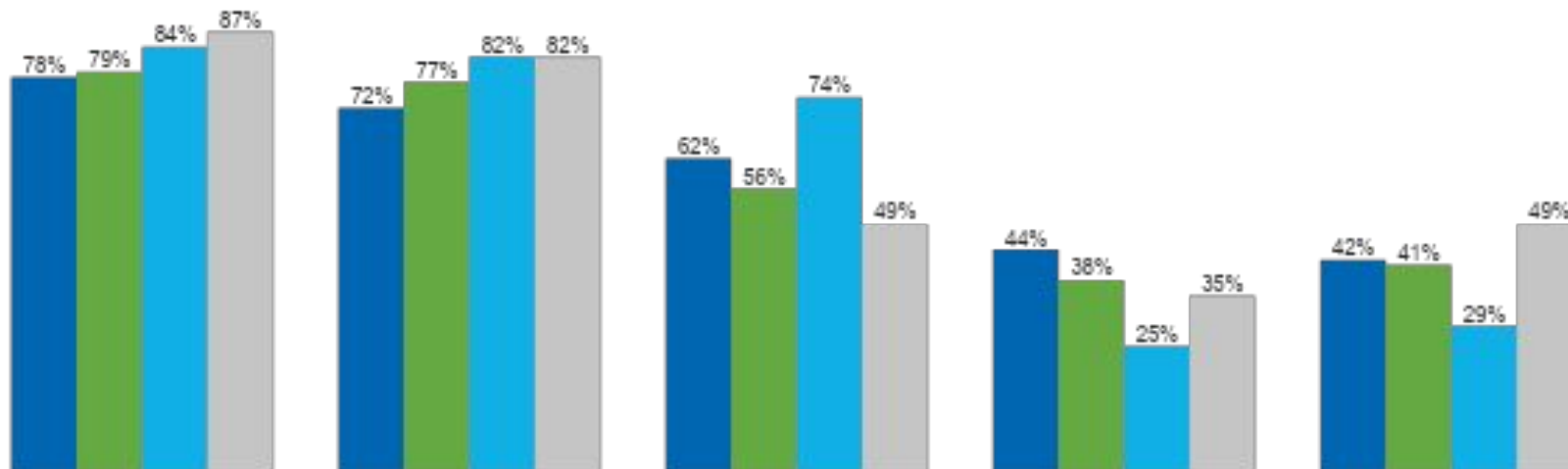
COVID-19 Sentiment Research (Combined Audiences - July 2020)

Organizers most positive towards in-person events, and least likely to agree that in-person events will become “nice to have”

Agreement with Statements

(Strongly Agree/Agree)

■ Attendees ■ Exhibitors ■ Organizers ■ Brand Marketers



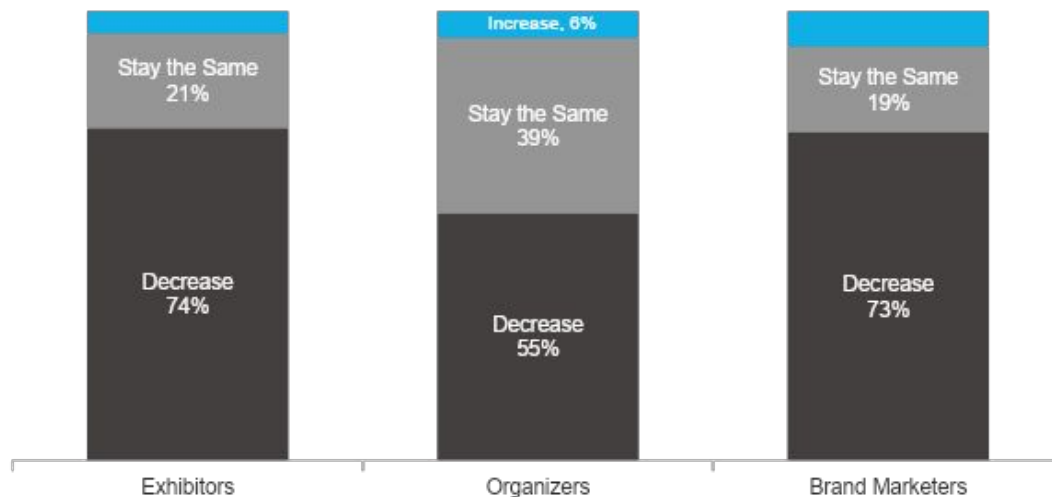
Given your background and experience at events, rate your level of agreement with each of the following statements.



COVID-19 Sentiment Research (Combined Audiences - July 2020)

¾ of Exhibitors and Brand Marketers expect to decrease the number of in-person events produced, only half of Organizers agree

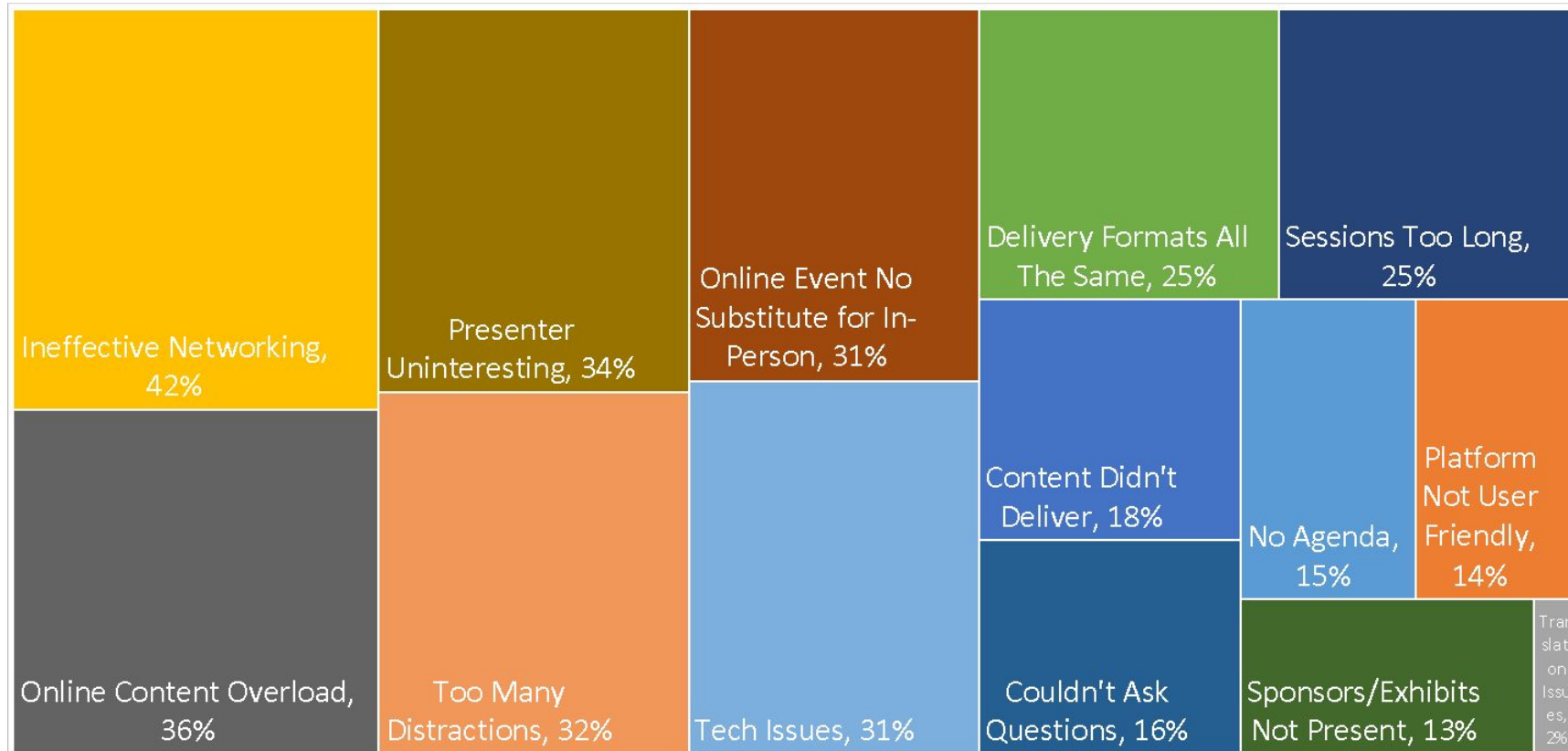
Change in In-Person Events Post-COVID



Overall, how do you expect the number of in-person events your company produces to change post-COVID?



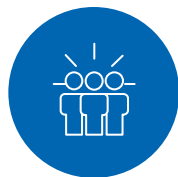
COVID-19 Sentiment Research (Combined Audiences - July 2020)



What challenges/frustrations have you faced with the digital/online events you participated in?

What does this mean for you?

The notable differences that we see among attendees, organizers, exhibitors and brand marketers is directly related to the impact in-person events have to their revenues.



Organizers

See events as a revenue generator, but must balance attendee needs

Organizers should...

- Consider an invitation only approach, rather than open registration



Attendees

Focused on health and safety guidelines

Organizers should...

- Focus on online / hybrid events
- Communicate with awareness and empathy



Exhibitors

See events as a revenue generator

Organizers should...

- Demonstrate value of online / hybrid events
- Provide high quality attendee interaction (networking)