



Freeman⁷ Event research

REPORT 4 | APRIL 2021

respondent snapshot

ATTENDEE PROFILE

8,214

attendee responses

±1.1%

margin of error

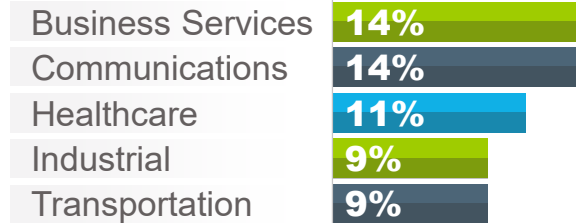
44%

of attendees are executives or C-level

13%

are international attendees

ATTENDEES BY INDUSTRY



EXHIBITOR PROFILE

1,169

exhibitor responses

±2.8%

margin of error

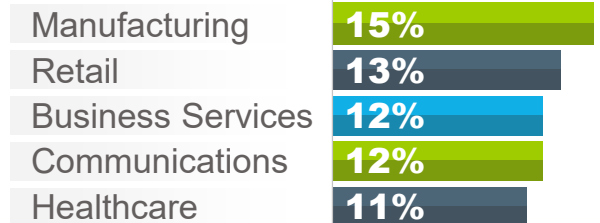
64%

of exhibiting companies have 100 or fewer employees

36%

of exhibitors are executives or C-level

EXHIBITORS BY INDUSTRY



Audience: Attendees and Exhibitors | Source: Sentiment Study

a bird's-eye view of the top-line findings

1

confidence and optimism is at an all-time high

Survey reveals the highest positive sentiment and confidence index to date, due in part to high vaccination rates.

2

timeline for return to events has shifted up

Survey reveals significant shift for both attendee and exhibitor willingness and timeline to return to in-person events.

3

virtual events will be part of our integrated event future

Virtual events continue to capture participation and attendees expect future event experiences to have a virtual component.

4

communication is critical for attendee and exhibitor confidence

Organizers have a major opportunity to provide key information to potential attendees to help them plan their attendance at in-person events.

attendee state of mind



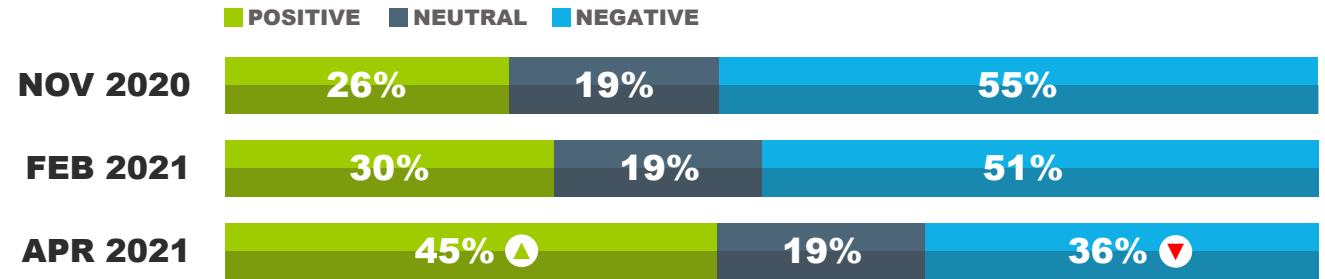
WHAT WE'RE SEEING

positive sentiment up significantly

- Overall positive sentiment increased from 30% to 45% and negative sentiment decreased from 51% to 36% (unaided).
- Positive sentiment was higher than any previous survey wave.
- 'Cautious' remains the top word; however, 'Excited' and 'Ready' are the most prominent to date.
- 'Eager', and 'Hope' make a stronger appearance.



OVERALL SENTIMENT



Audience: Attendees | Source: Sentiment Study



What ONE word best describes your current emotional state towards attending in-person events while the pandemic is going on? (unaided)

Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

attendee confidence is strong

- April reflects a 0.81 Confidence Index; an index above 0.8 is rooted in confidence and starts to reflect a move into the positive.
- The Confidence Index continues to trend up across industries and the past three waves — with the greatest increase in April.

CONFIDENCE INDEX



Audience: Attendees | **Source:** Sentiment Study

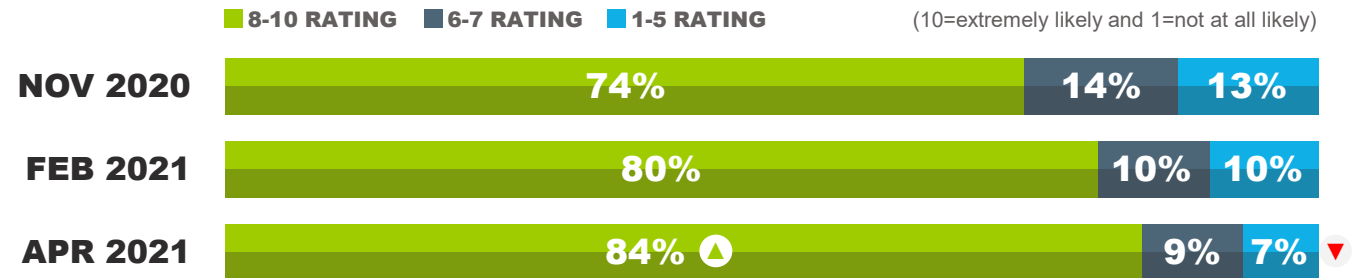
The Confidence Index is calculated with an algorithm using the results of the likelihood of attending and timeframe for attending events. It is expressed on a 0 – 1 scale. An index of 0.8 or higher is desired.

WHAT WE'RE SEEING

likelihood to return to in-person events is up

- Those who are extremely likely to attend an in-person event increased from 80% to 84% and those unlikely decreased from 10% to 7%.
- April results are above with what we see during a 'normal' year. For any given year, Freeman's benchmark data indicates that about 10% of attendees are not likely to return while 80% will return.

LIKELIHOOD OF ATTENDING IN-PERSON EVENTS



Audience: Attendees | Source: Sentiment Study



Once B2B in-person events are permitted to occur and the coronavirus threat is under control, how likely would you be to attend an in-person B2B convention or exhibition?

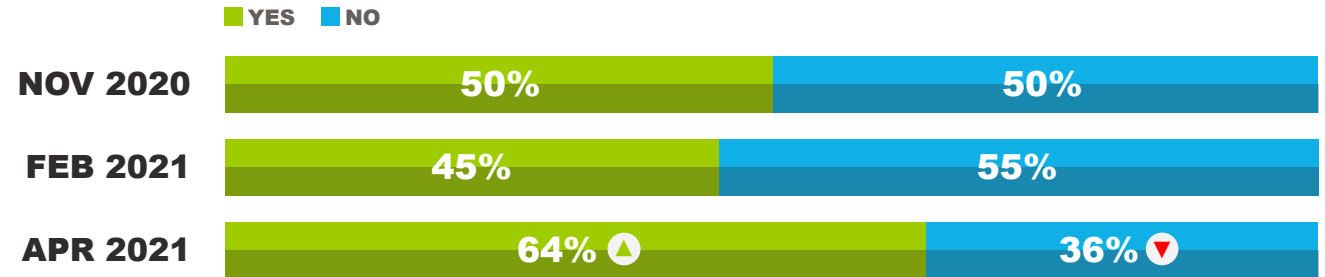
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

there is progress and room to improve

- 1/3 of attendees still do not have enough information to make an attendance decision.
- 'Yes' responses increased from 45% to 64% and 'No' responses decreased from 55% to 36%.
- Vaccine availability likely driving increase in reliability of information.

HAVE ENOUGH RELIABLE INFORMATION TO MAKE AN ATTENDANCE DECISION



Audience: Attendees | Source: Sentiment Study



Do you currently have enough reliable information to make a decision on when to attend your next in-person event?

Statistically significant difference from previous wave. ▲ ▼

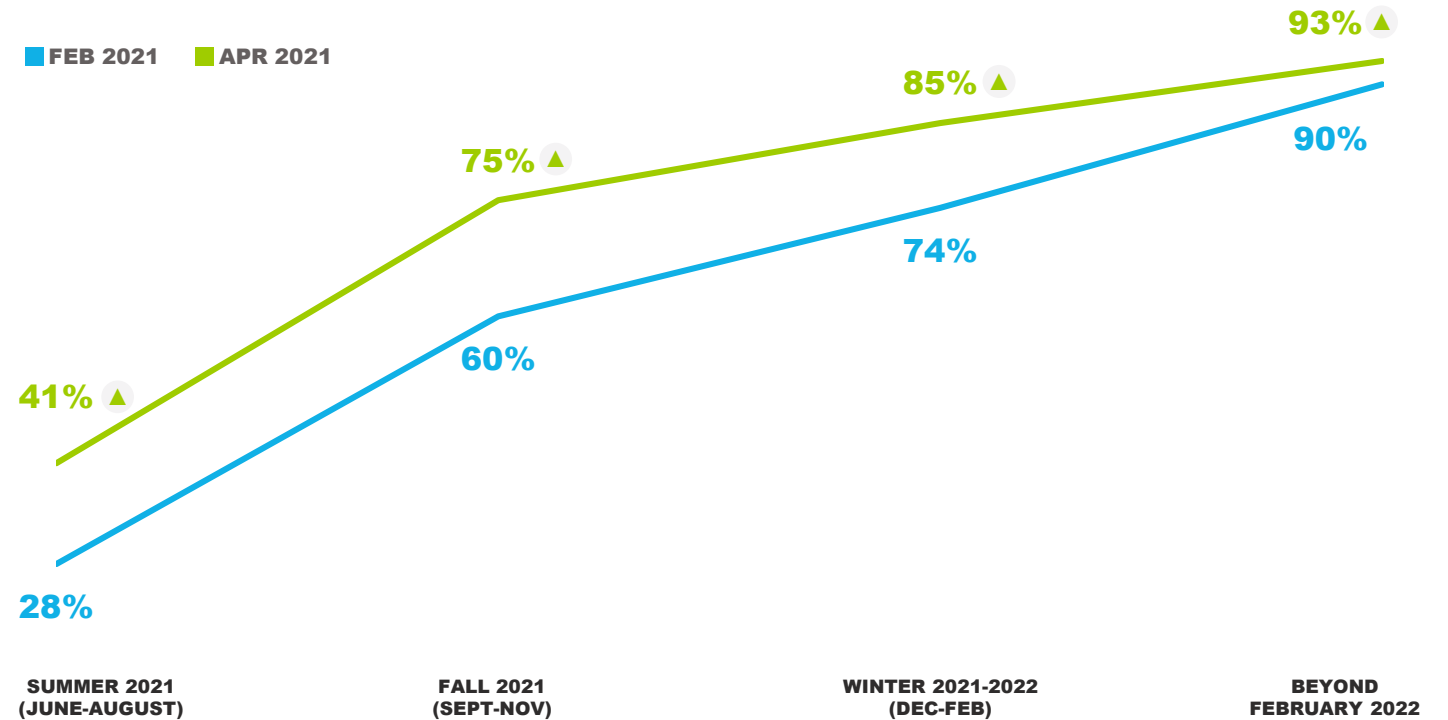
Results of Poll 1

WHAT WE'RE SEEING

time frame for returning to events accelerated

- 85% of attendees expect to return to live events by Winter 2021.
- This represents a significant shift from February, at which time just 74-78% expected to return by the end of 2021.
- As in the past, manufacturing is the most eager to return to in-person events while healthcare remains the most cautious.
- Trends in business travel, vaccinations, and safety will dictate the movement of the overall time frame.

EXPECTED TIME FRAME OF ATTENDING IN-PERSON B2B EVENT



Audience: Attendees | Source: Sentiment Study



U.S. health officials expect everyone will be eligible to be vaccinated by May 2021. When would you expect to attend your next in-person event?

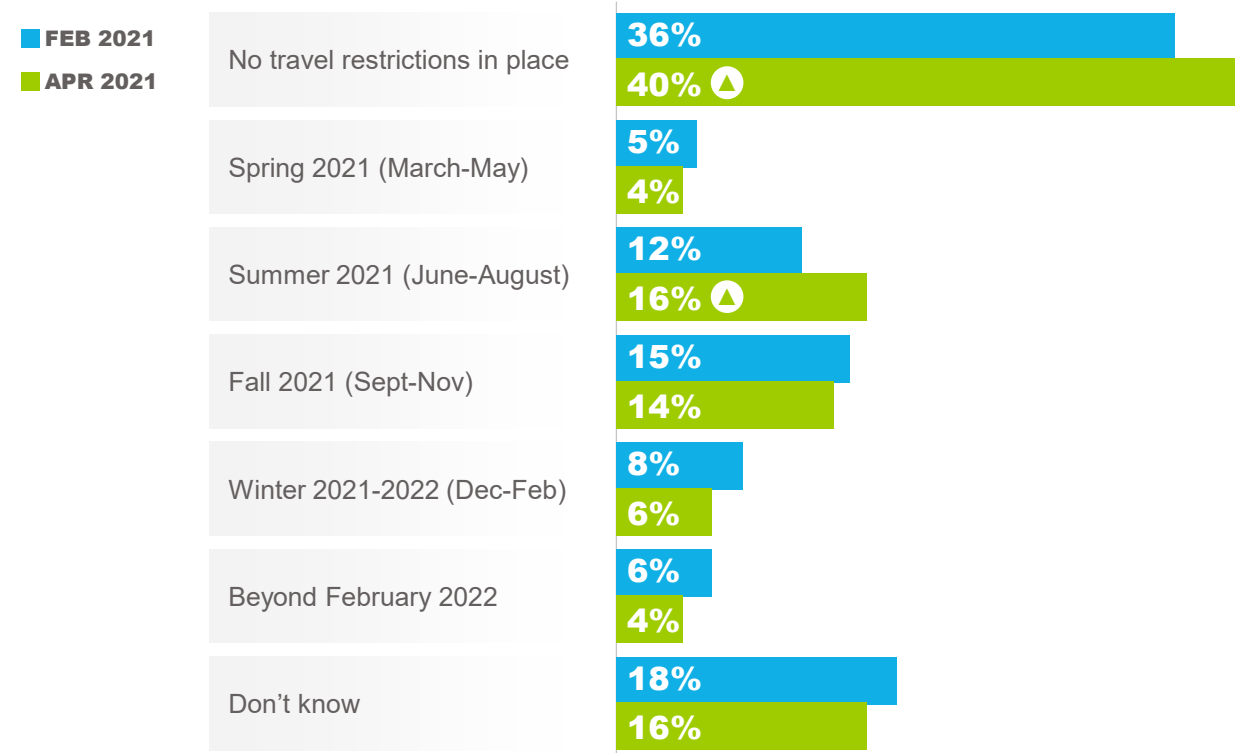
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

most expect travel bans to be lifted by fall

- 74% of attendees will have no travel restrictions in place by Fall 2021.
- This coincides with when most attendees and exhibitors (75%) expect to return to in-person events.

EXPECTED TIME FRAME FOR LIFTING TRAVEL RESTRICTIONS



Audience: Attendees | Source: Sentiment Study



When do you expect your company travel ban to be lifted?

Statistically significant difference from previous wave. ▲ ▼

vaccinations



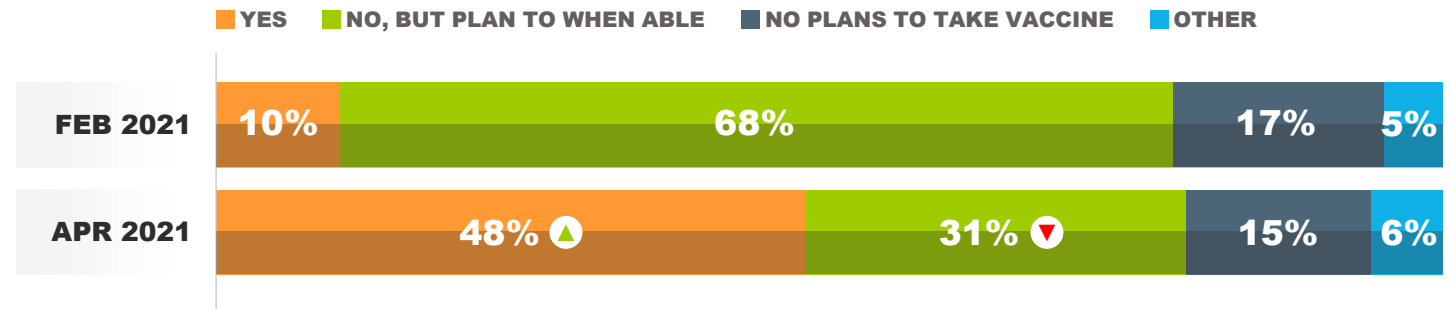
Results of Poll 2

WHAT WE'RE SEEING

significant jump in those who have been vaccinated

- A total of 79% of respondents plan to get vaccinated or already have; 48% are already vaccinated.

HAVE YOU BEEN VACCINATED FOR COVID-19?



Audience: Attendees and Exhibitors | Source: Sentiment Study



Have you been vaccinated for Covid-19?

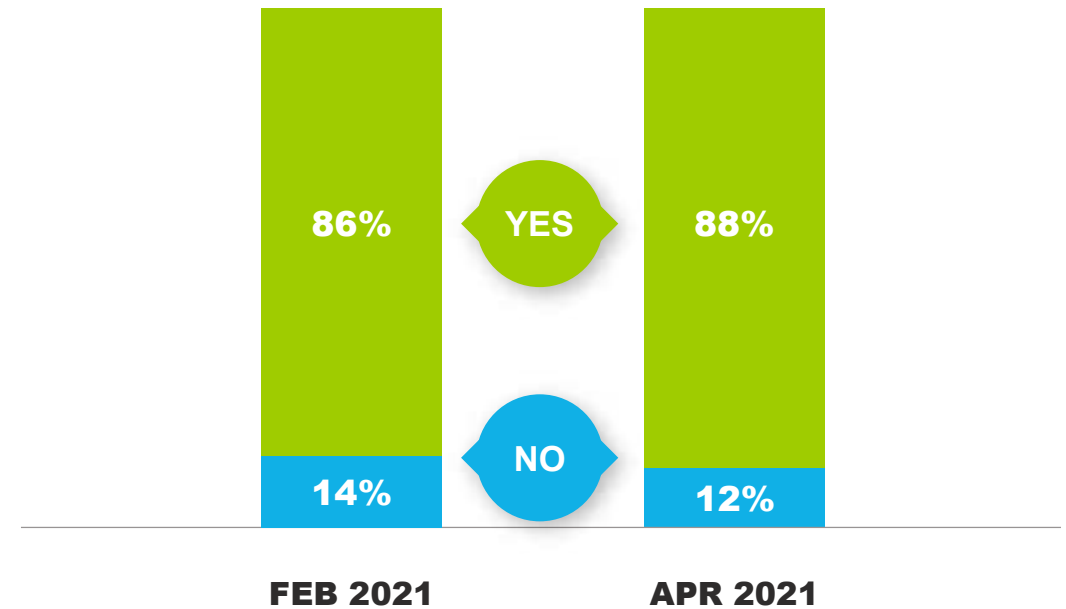
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

vaccination will substantially boost confidence in attending in-person

- 88% indicated a vaccine will increase their confidence in attending in-person events.
- Confidence has increased 2 percentage points from February.

WILL VACCINATION INCREASE CONFIDENCE ATTENDING IN-PERSON EVENTS?



Audience: Attendees | Source: Sentiment Study
Base: Those who have been vaccinated or plan to be



Once you are vaccinated, will you be more confident in attending in-person events?

exhibitor lens

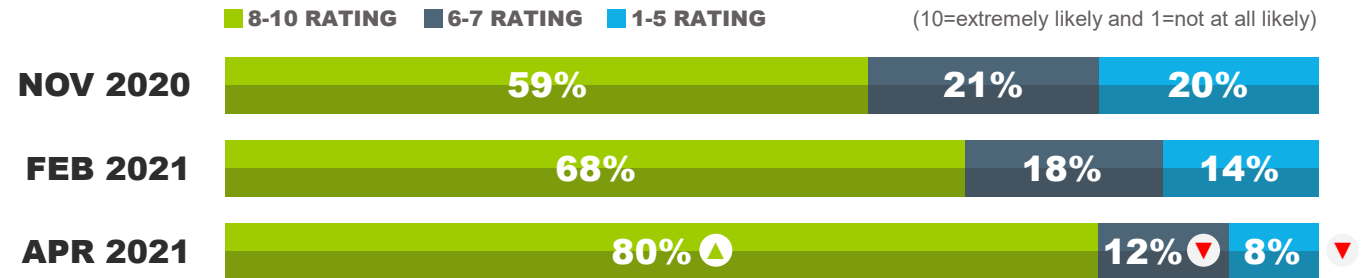


WHAT WE'RE SEEING

likelihood to exhibit at in-person events is up

- Exhibitor likelihood to exhibit at an in-person event increased from 68% to 80% and those unlikely decreased from 14% to 8%.
- Highest values to date for both exhibitors and attendees.

LIKELIHOOD OF ATTENDING IN-PERSON EVENTS



Audience: Exhibitors | Source: Sentiment Study



Once in-person events are permitted to occur and the coronavirus threat has lessened, how likely would you be to exhibit?

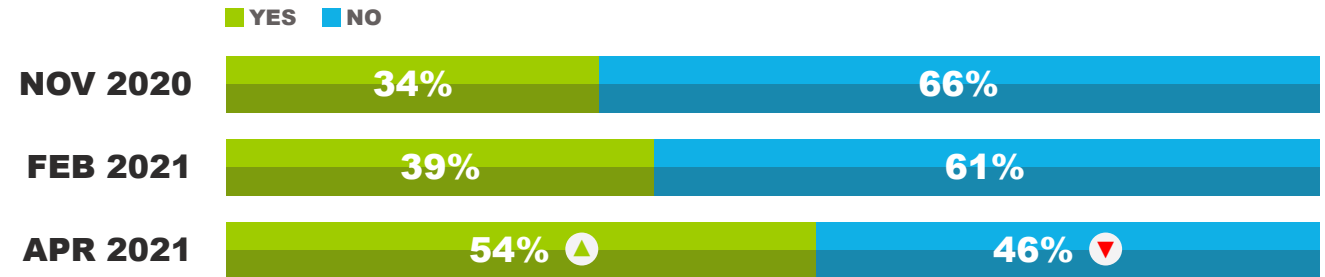
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

significant increase in reliability of information

- While we're seeing this trend up over time, about half the exhibitors still lack sufficient information on when to exhibit at in-person events.

HAVE ENOUGH RELIABLE INFORMATION TO MAKE EXHIBITING DECISION



Audience: Exhibitors | Source: Sentiment Study



Do you currently have enough reliable information to make a decision on when to exhibit at your next in-person event?

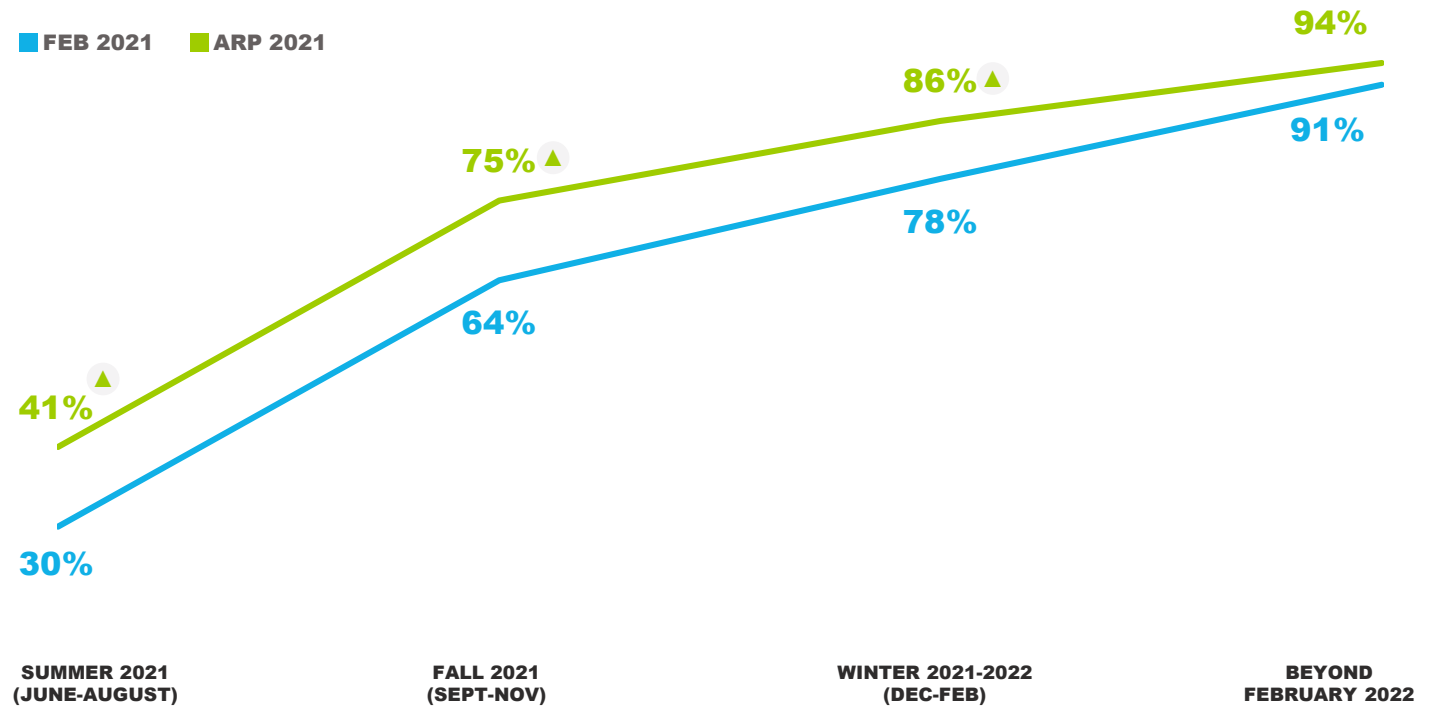
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

time frame for exhibiting at events accelerated

- 86% of exhibitors expect to return to live events by Winter 2021.
- This recent change represents a significant shift from February, at which time 78% expected to exhibit by end of 2021.

EXPECTED TIME FRAME OF EXHIBITING AT IN-PERSON EVENTS



Audience: Exhibitors | Source: Sentiment Study



U.S. health officials expect everyone will be eligible to be vaccinated by May 2021. When would you expect to attend your next in-person event?

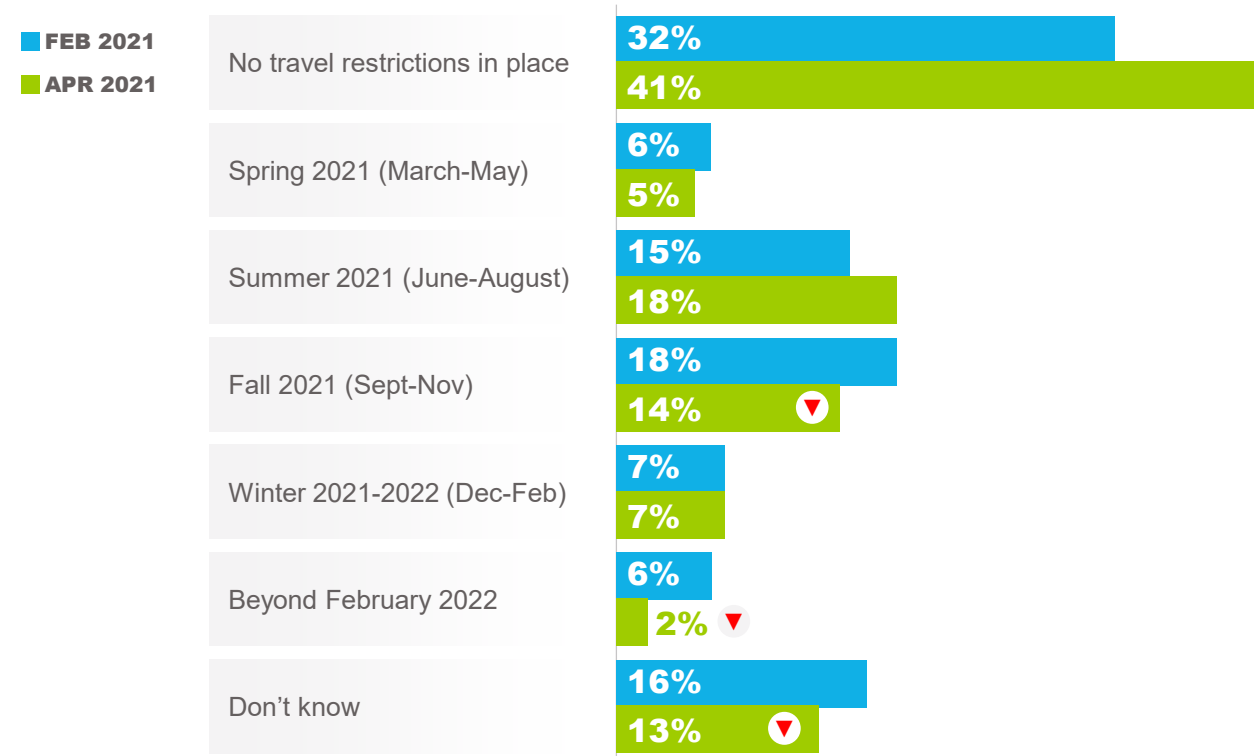
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

expect travel bans to be lifted by fall

- 40% of exhibitors' have already lifted their travel ban, with a further 44% expecting their bans to be lifted by Winter 2021.
- 78% of exhibitors will have no travel restrictions in place by Fall 2021.

EXPECTED TIME FRAME FOR LIFTING TRAVEL RESTRICTIONS



Audience: Exhibitors | Source: Sentiment Study



When do you expect your company travel restrictions to be lifted?

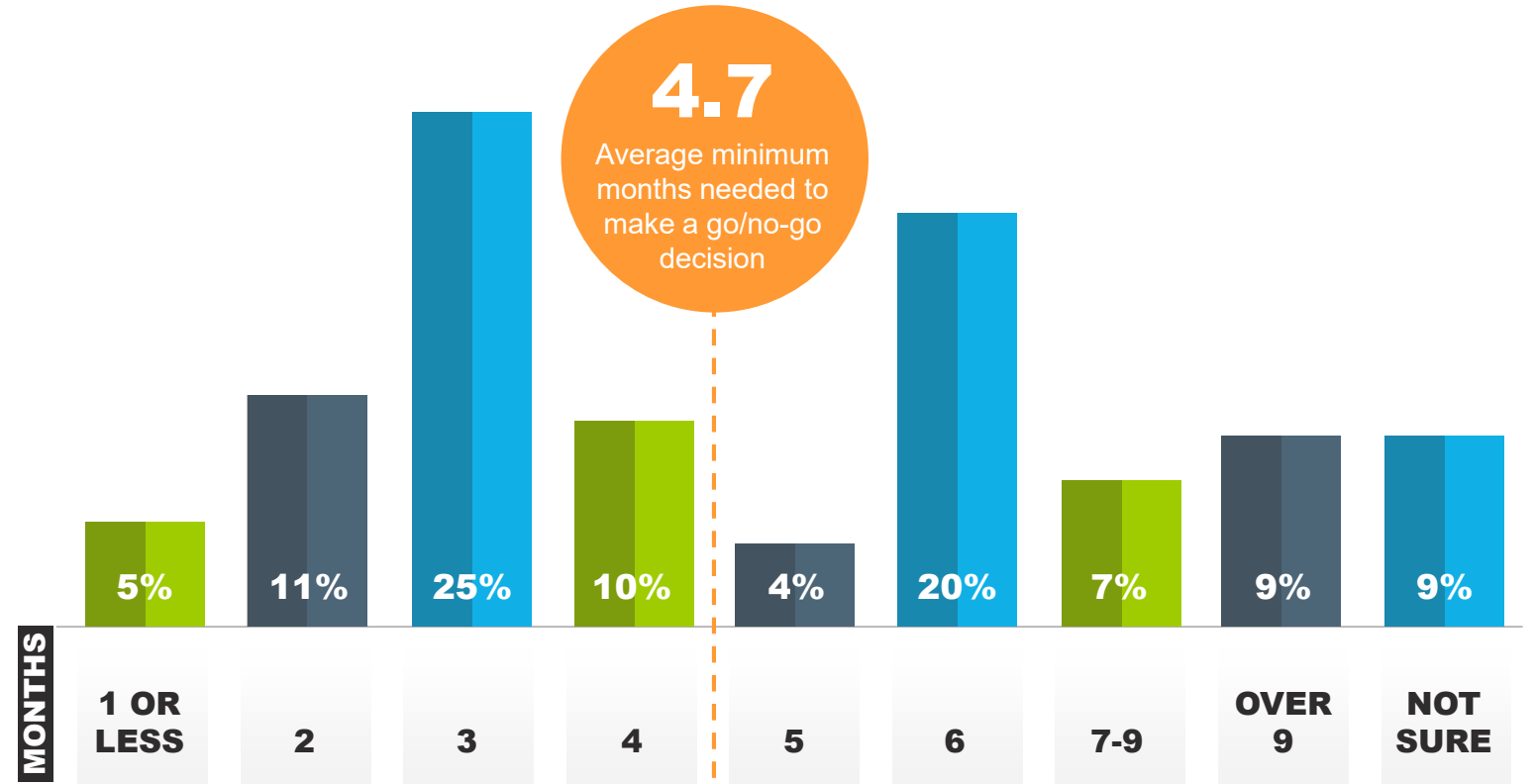
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

exhibitor decision-making time frame

- Exhibitors need all relevant event information about 5 months prior to event in order to make a go/no-go decision to exhibit.

ADVANCE TIME NEEDED TO MAKE DECISION TO EXHIBIT

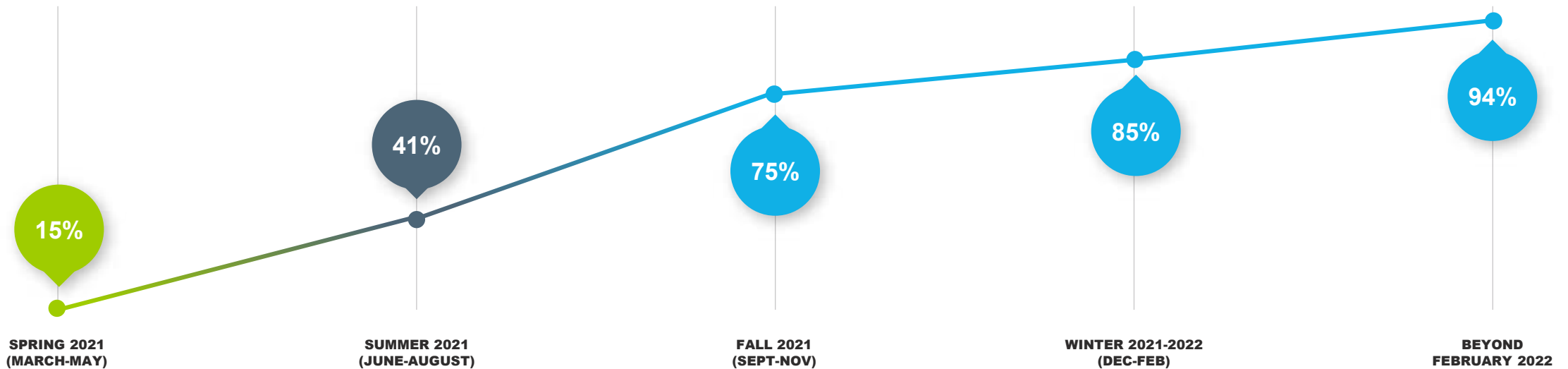


Audience: Exhibitor | Source: Sentiment Study



As you are planning for events in 2021, what is the minimum amount of time you need to make a go/no-go decision to participate?

short-term and long-term outlook



NOW

VIRTUAL ONLY

- **Redefine Experience.** It's not just about 'fun' but rather about effective UX/UI and programming for continuity that provide ease and efficiency.
- **Concise and Compelling.** Leverage content to provide thoughtful connections that evaluate the experience. Content, community, and conversations are all intertwined.

NEAR

SMALLER IN-PERSON + VIRTUAL

- **Critical Considerations.** Determine feasible upside and downside scenarios based on event type, industry, attendee priorities, technology capabilities, and overall health factors.
- **Managing Size and Scale.** Smaller in-person events doesn't just mean shirking the footprint. It means thoughtful consideration for traffic patterns and flow, integrating exhibitors, and establishing FOMO for future participation.

NEXT

SAFE RETURN TO LARGE IN-PERSON EVENTS + SMALLER VIRTUAL

- **Safety is the New Currency.** Attendees will be looking for visual confirmation of safety and will want choices to help them take control of their in-person experience from a safety perspective. Providing the necessary tools and clarity will be imperative.
- **Extracting the Most from Virtual.** Don't be quick to dismiss the momentum built across virtual. Continue to hone this channel to attract new audiences, serve content, and engage year-round. Attendees are telling us they plan to lean in on virtual, thus don't overlook opportunities to continuously engage across multiple mediums.

actions summary

The time to start planning for the Fall & Winter is now. Reference these recommendations as you prepare your 2021 event plans and beyond.

> GET PLANNING, WITH HEALTH & SAFETY IN MIND

With confidence at a high and vaccination in full ramp, it's time to start planning for the return of in-person events, adapting the environment to incorporate new health & safety requirements.

> GET TO KNOW THE NEEDS OF BOTH YOUR AUDIENCES

Your virtual attendees and in-person attendees are different audiences with different goals. Take a deep dive into their preferences to map out their unique journeys and design for each.

> CONTINUE TO INTEGRATE VIRTUAL

Virtual attendees are still seeing finding value in session content and learning. Even when in-person becomes more widely available, virtual will still be valuable to reach new audiences.

> COMMUNICATIONS ARE CRITICAL FOR CONFIDENCE

Develop effective communication plans to both attendees and exhibitors, covering safety concerns at least 1-3 months prior to the event to help your audiences feel confident to attend.