

# IAEE

**Exhibitions and Events Mean Business**

[www.iaee.com/chapters](http://www.iaee.com/chapters)

*Washington DC Chapter*

[www.iaeedc-chapter.com](http://www.iaeedc-chapter.com)

# Welcome!

## May 2020

### Lunch & Learn

# Sponsorships – Annual Partners



Website



Registration



Signage



Newsletter



Audio Visual



Photography



Administration

# IAEE DC COVID-19 Community Outreach



Your generosity has helped the chapter has raise **\$690** to support the [Capital Area Food Bank](#). The DC chapter is providing a **\$500** match to these donations. *This donation will purchase approximately 420 pounds of food.*



[Humane Rescue Alliance](#) (HRA) takes in an average of 30 animals per day. The team works around the clock to provide for all of the animals, but shelter space and resources are limited. Volunteers are needed to foster or help at the shelter.

Visit the chapter website at [www.iaeedc-chapter.com](http://www.iaeedc-chapter.com) for more information on how you can give of your time and talents.

# IAEE DC Chair's Charity



The Michael J. Fox Foundation's (MJFF) agenda is focused on building improved knowledge about the lived experience of Parkinson's disease, finding an objective test for Parkinson's, engaging patients in research and supporting the development of new treatments and a cure.

***88 cents of every \$1.00 is put towards research***

To learn more about this amazing foundation and the important work they are doing to find a cure for Parkinson's disease, visit their website at <https://www.michaeljfox.org/>. When registering for an IAEE DC Chapter event, you can donate by giving online [here](#).

# Call for Chapter Volunteers

# Committees

*We need just a few hours of your time to serve on chapter committees. Opportunities range from communications, community service, marketing, program, special events, sponsorship, nominating and young professionals.*

# Board of Directors

*Want to be part of the vision for the chapter? Complete the interest form to inform leadership of your interest to serve on the chapter board of directors. The board meets four to six times per year.*

Visit the chapter website at [www.iaeedc-chapter.com](http://www.iaeedc-chapter.com) to learn more about these opportunities or to complete the interest form.





# We Need Your Support

Become a sponsor of a future program and/or event.

Visit the website at [www.iaeedc-chapter.com](http://www.iaeedc-chapter.com)

or contact the Chapter Administrator for more information

[iaeedc@myassociationhq.com](mailto:iaeedc@myassociationhq.com)



**Thank you to our  
Corporate Partners**

Registration

**cvent**

Photography

**EPNAC**  
EVENT PHOTOGRAPHY OF NORTH AMERICA CORPORATION

Website

**asp**

Administration

**M.A.R.**  
ASSOCIATION & MEETING  
MANAGEMENT

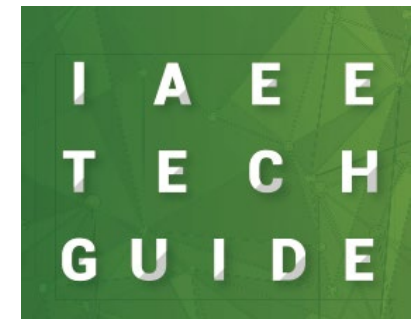
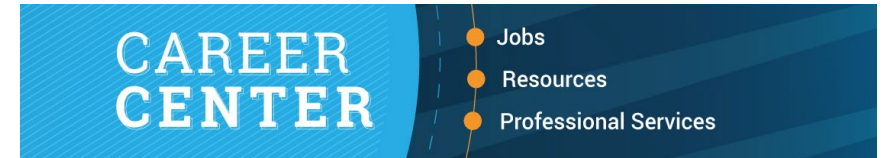
**Thank you to our Annual Sponsors:**

**fern**

**Hargrove**  
EXPERIENCE

# Stay Connected – Visit IAEE Member Resources

**Exhibition Industry Resource Guide**



**Trade Show Calendar**

**Mentor Match Program**



# CEM LEARNING PROGRAM

Join the elite  
**CEM Community**



## CEM Community

Professional Association Operations

Trade Association

Sales Show Management For Profit

Consumer Show Marketing

Venue/Convention Center

Supplier/Vendor Service Provider

Globally recognized designation that demonstrates the highest professional standard throughout the exhibition and event management arena

Curricula reflects the latest thinking in exhibitions and events management

Emphasis on practical knowledge

Candidates must have at least three (3) years of fulltime experience in the exhibitions and events industry

# Audience Engagement Opportunities (aka Door Prizes)

- Three opportunities to win door prizes today
- Rules of engagement
  - Question will be asked
  - First *correct* response in the chat feature will win one of three prizes
- Door prizes
  - Round trip airfare for two and a 2-night stay at Seminole Hard Rock Hotel and Casino, compliments of Fort Lauderdale. *Travel must be booked in 2021, some blackout dates will apply.*
  - Round trip airfare for two and 2-night stay at Diplomat Beach Resort, compliments of Fort Lauderdale. *Travel must be booked in 2021, some blackout dates will apply.*
  - 25,000 World of Hyatt Points, compliments of Hyatt National Sales

# Question #1

What are the dates and location of Expo! Expo! 2020?

The logo for the IAEE Expo! Annual Meeting & Exhibition 2020. It features the text "IAEE" in a large, bold, green font, followed by "Expo!" in a large, bold, white font. Below "IAEE" is the text "Annual Meeting & Exhibition 2020" in a smaller, teal font. A horizontal line separates the top text from the location and dates below.

**IAEE Expo!**  
Annual Meeting  
& Exhibition  
2020

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**LOUISVILLE, KENTUCKY**  
8-10 DECEMBER | **2020**

GREATER  
FORT LAUDERDALE



*Our Expertise Is Your Event*

*STR Data –  
Powering the  
Future*

# Our Panel for Today



David DuBois  
President & CEO  
International Association of  
Exhibitions and Events



Kelsey Waite  
Business Development  
Executive, Destinations  
STR, Inc.

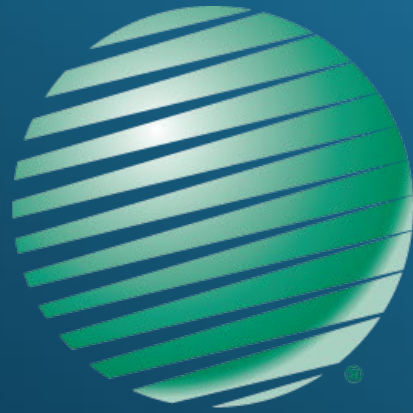


Kristi White  
VP, Product Management  
Knowland



Amy Calvert  
CEO  
Events Industry Council





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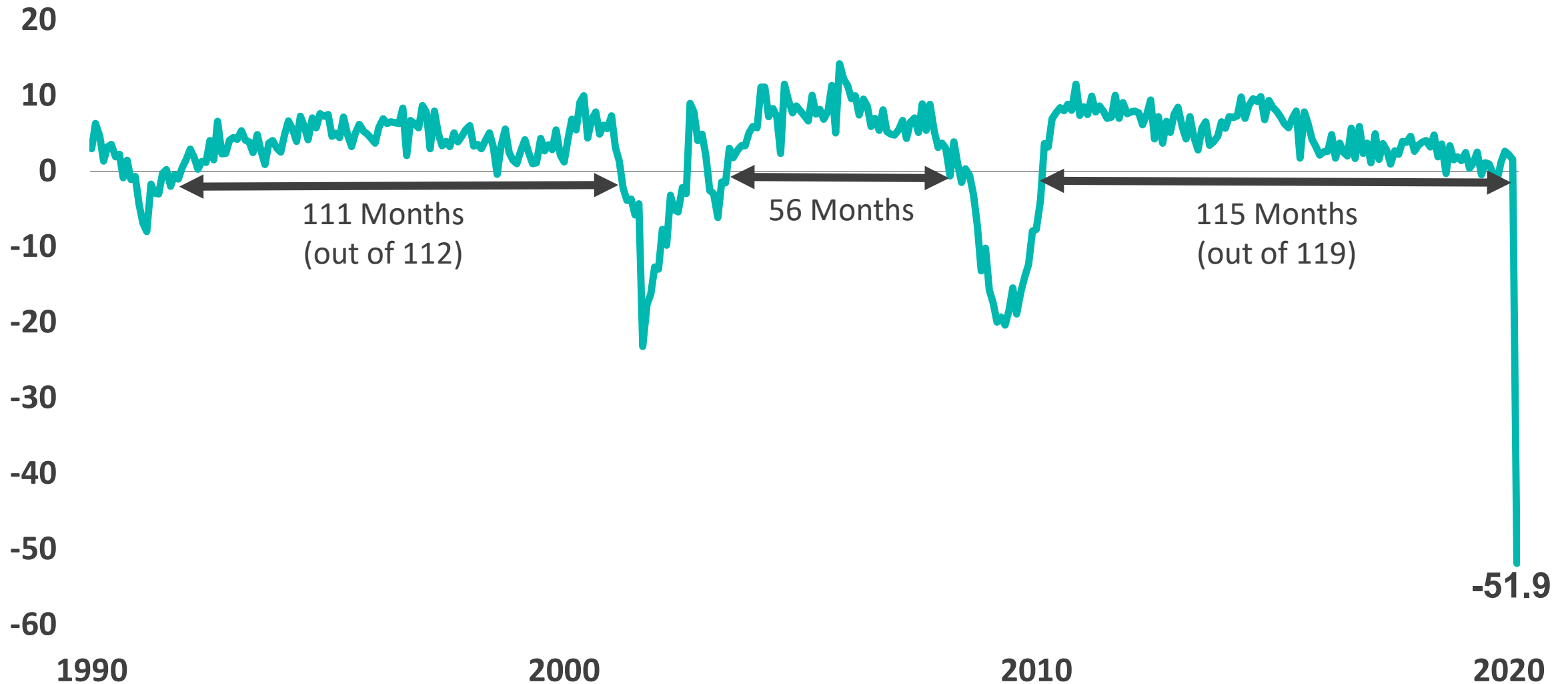
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# RevPAR Growth: The Downturn is Officially Here



Total U.S. 1/1990 – 03/2020





# What happened then? 9/11 and 2009

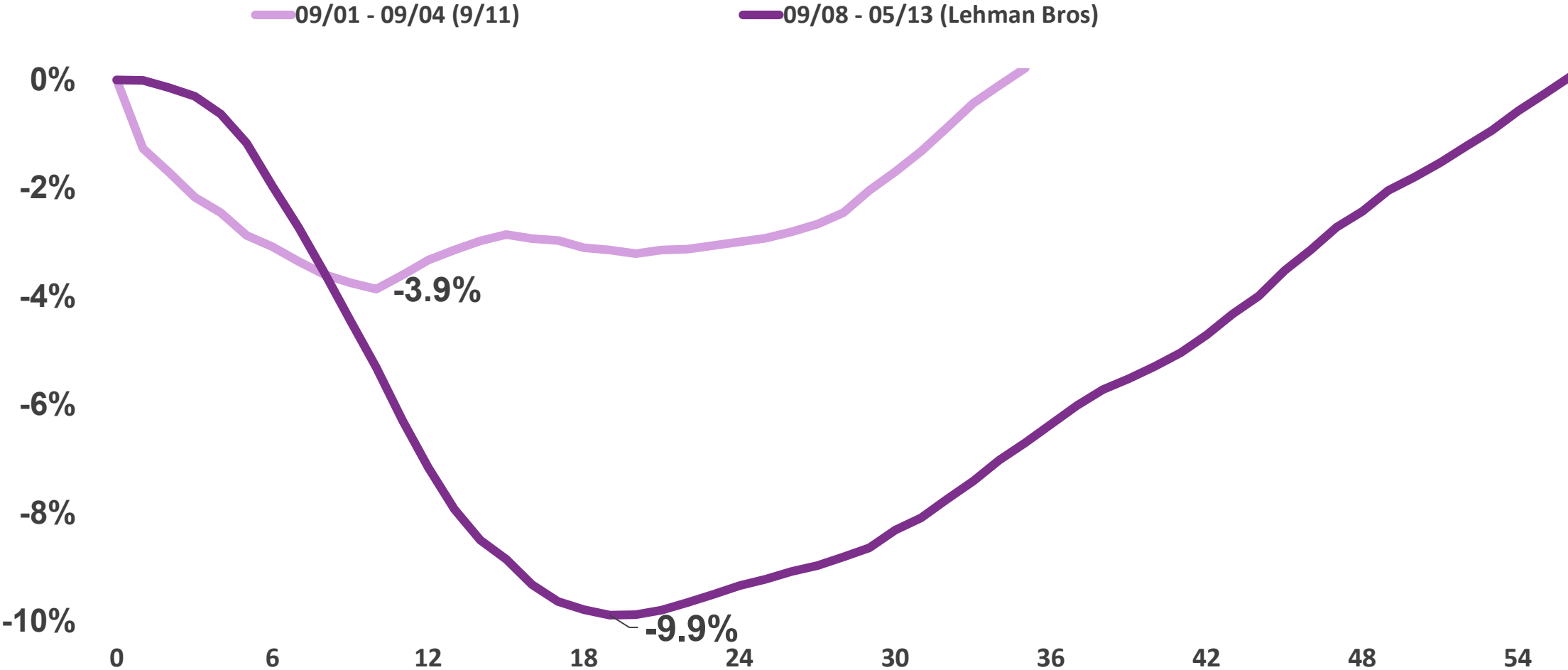


**HOTEL DATA  
CONFERENCE**  
Hosted by STR and Hotel News Now

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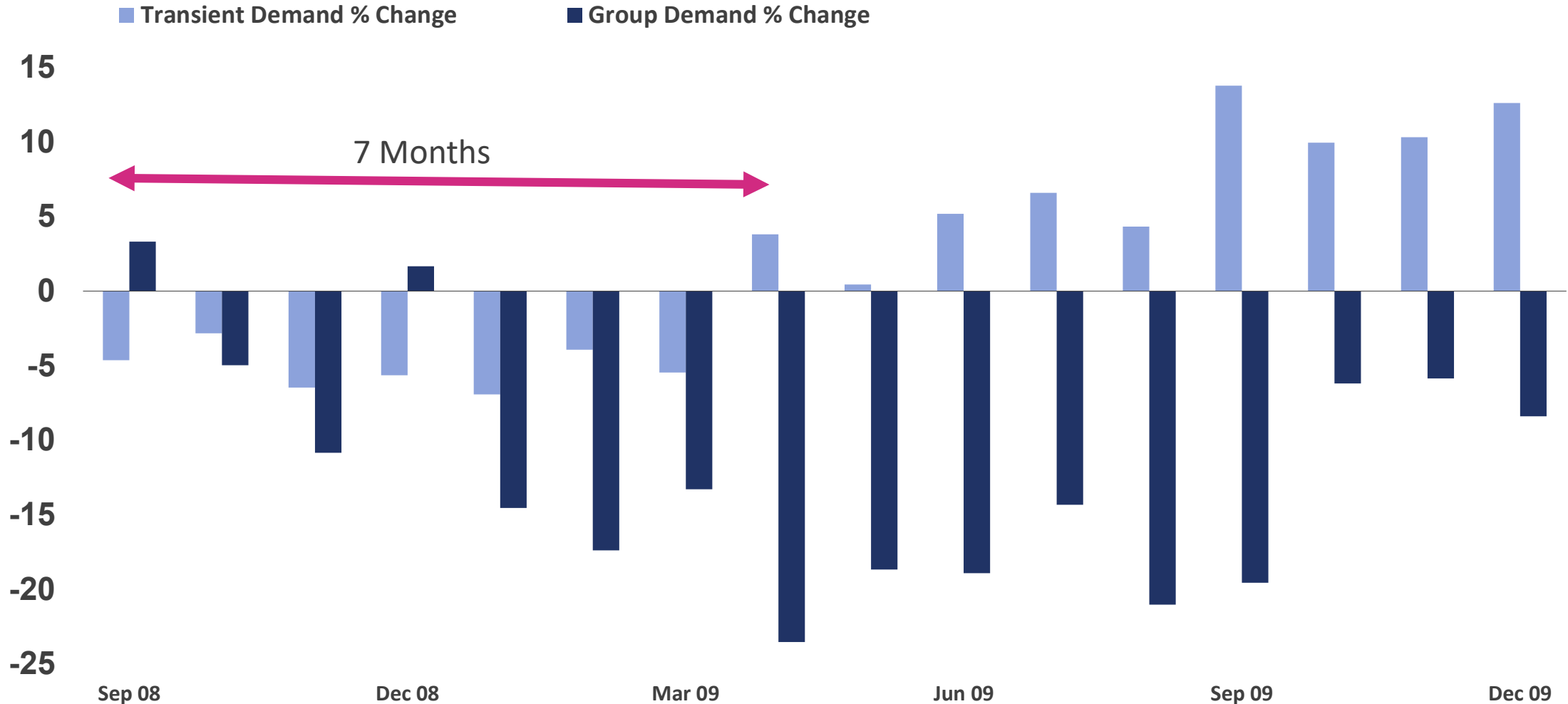
# ADR Rebound After External Shock Takes Time

Total U.S., 12MMA , Monthly ADR % Change, Indexed to Event



# 2009: Top25 Transient Demand Rebounds Quickly

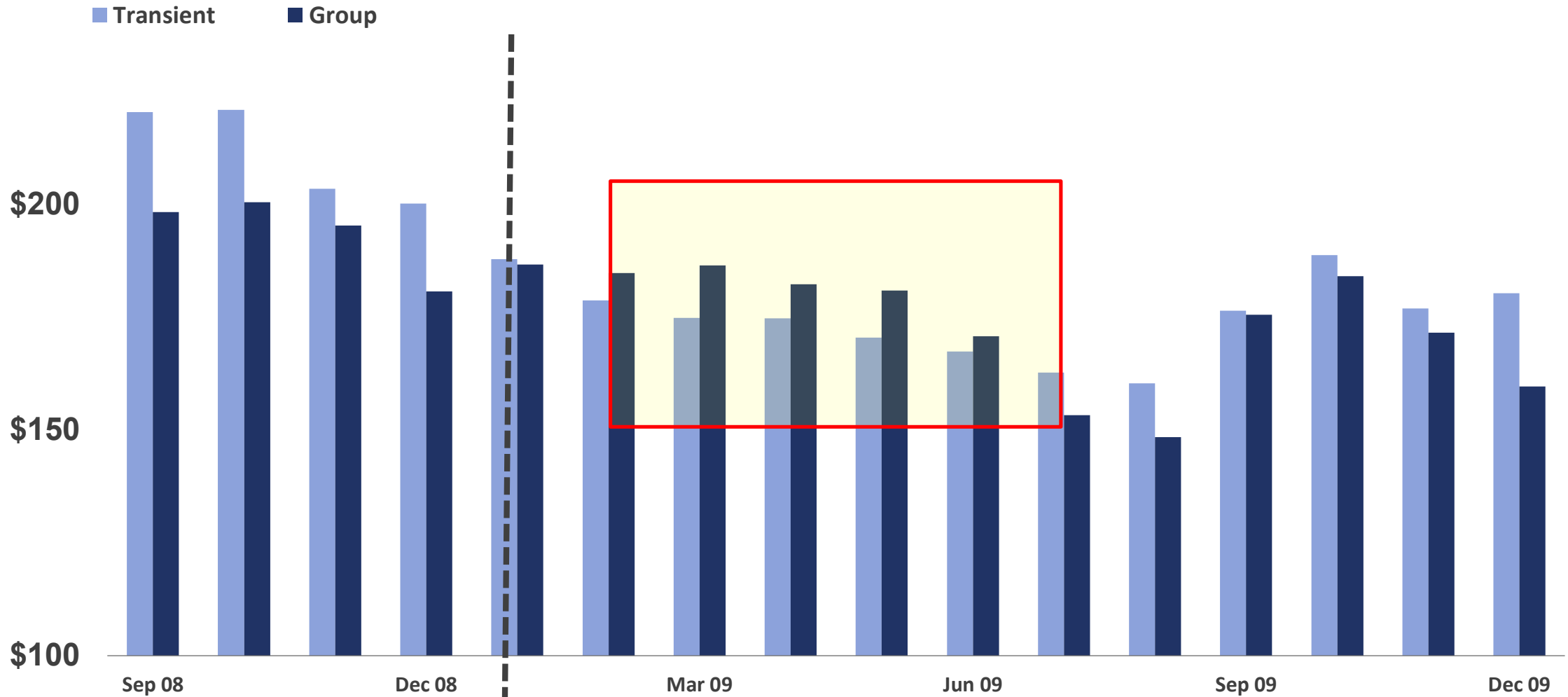
Lux & UU Class, Segmentation, by Month





# 2009: Top25 Group ADR > Transient ADR

Lux & UU Class ADR, by Segmentation, by Month





# What happens now?

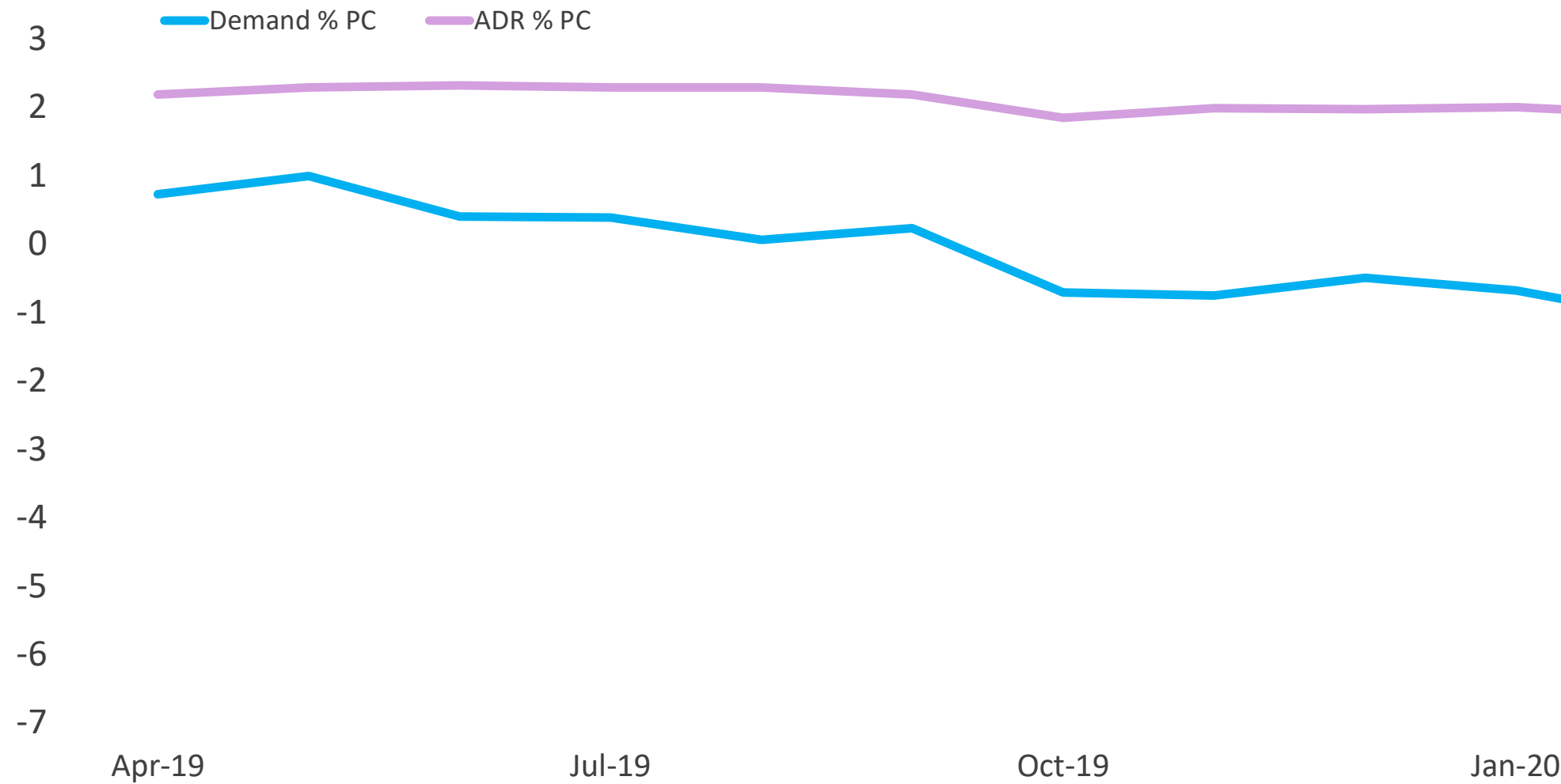


**HOTEL DATA**  
CONFERENCE  
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# Group ADR Will Drop

12 MMA, 1/2019 – 03/2020



## Segmentation: No Corporate Demand

Total U.S., Segmentation KPIs, % Change, week ending April 25



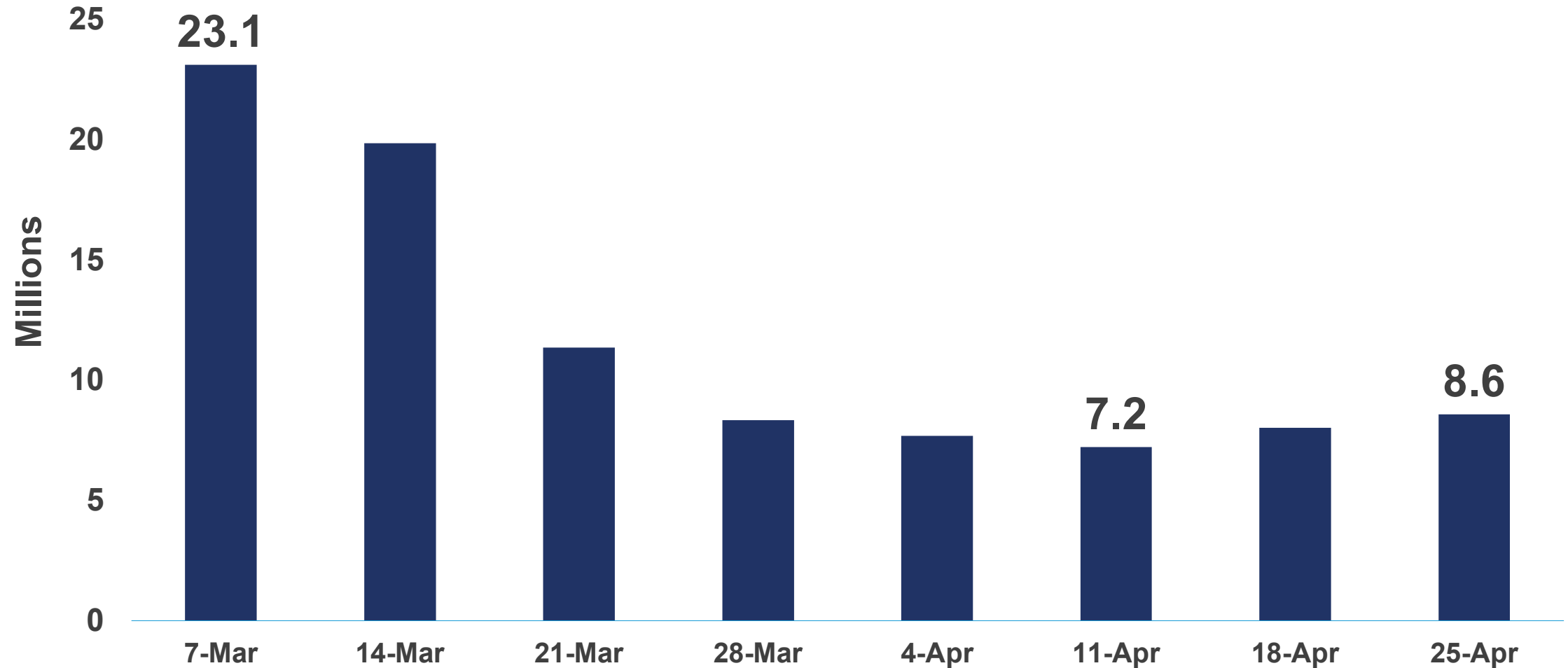
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	Transient	Group
Occupancy	-87.4	-84.3
ADR	-45.8	-44.7
RevPAR	-93.2	-91.3

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# Weekly Room Demand: Slowly Increasing (?)

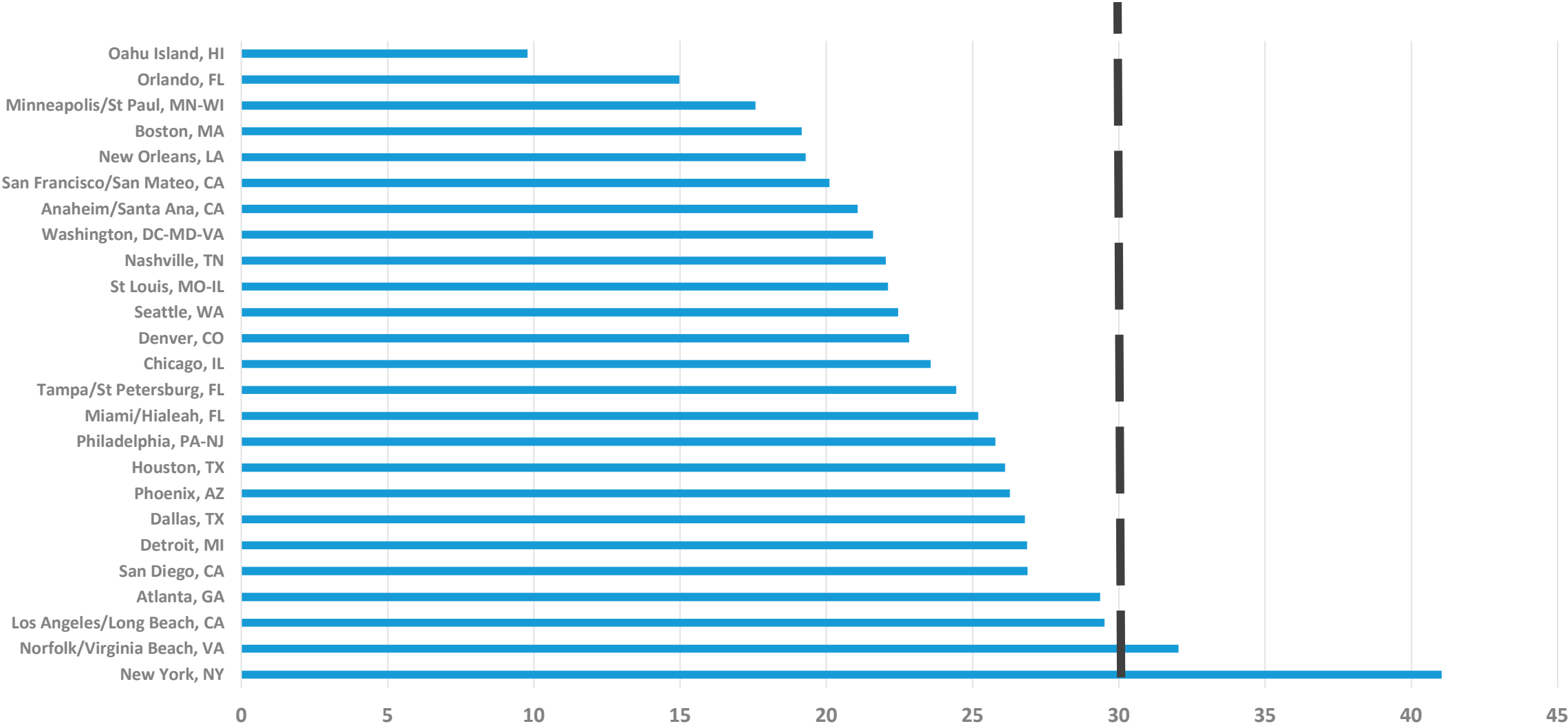
Total U.S., by Week





# Top 25: Still 5 Markets With Occupancy Under 20%

Occupancy %, Week end April 25

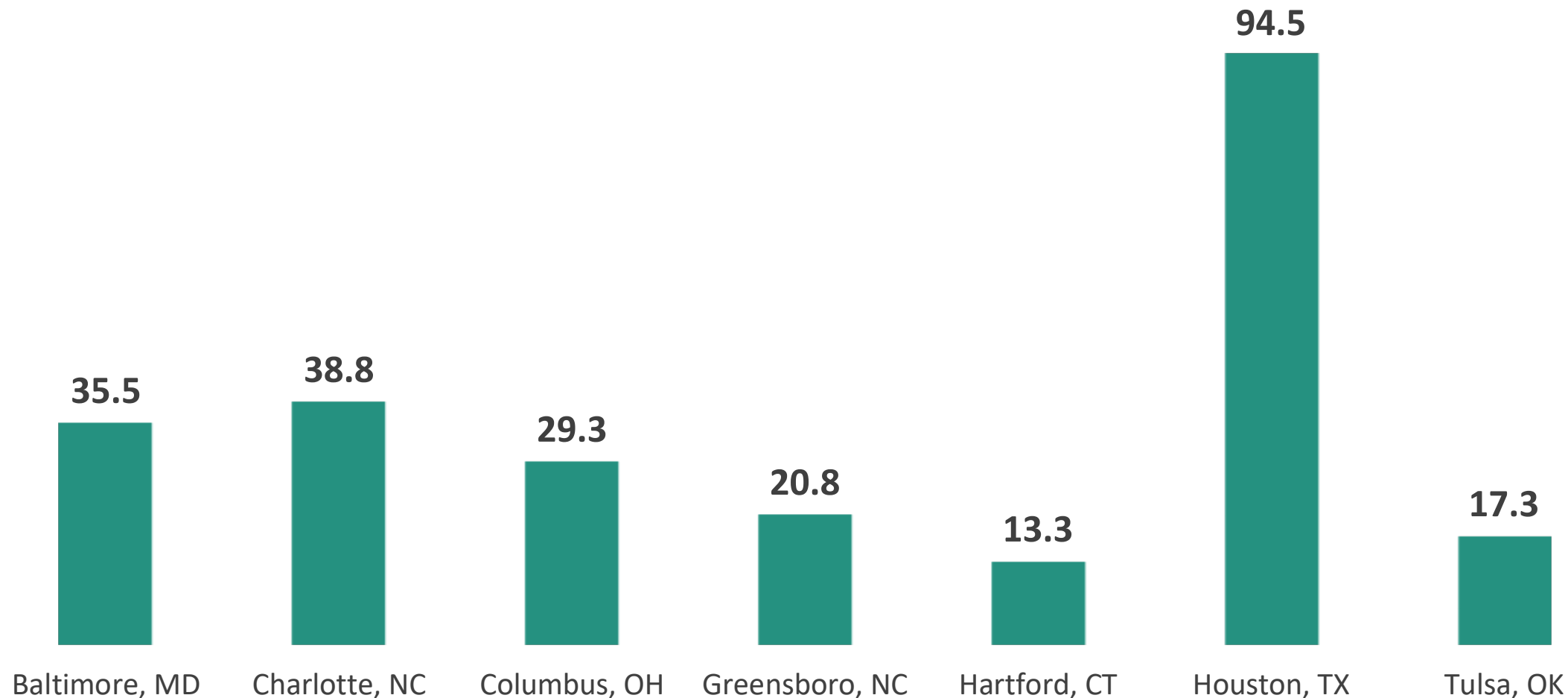


What happens next?

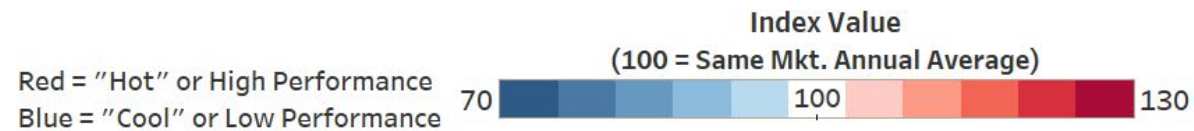
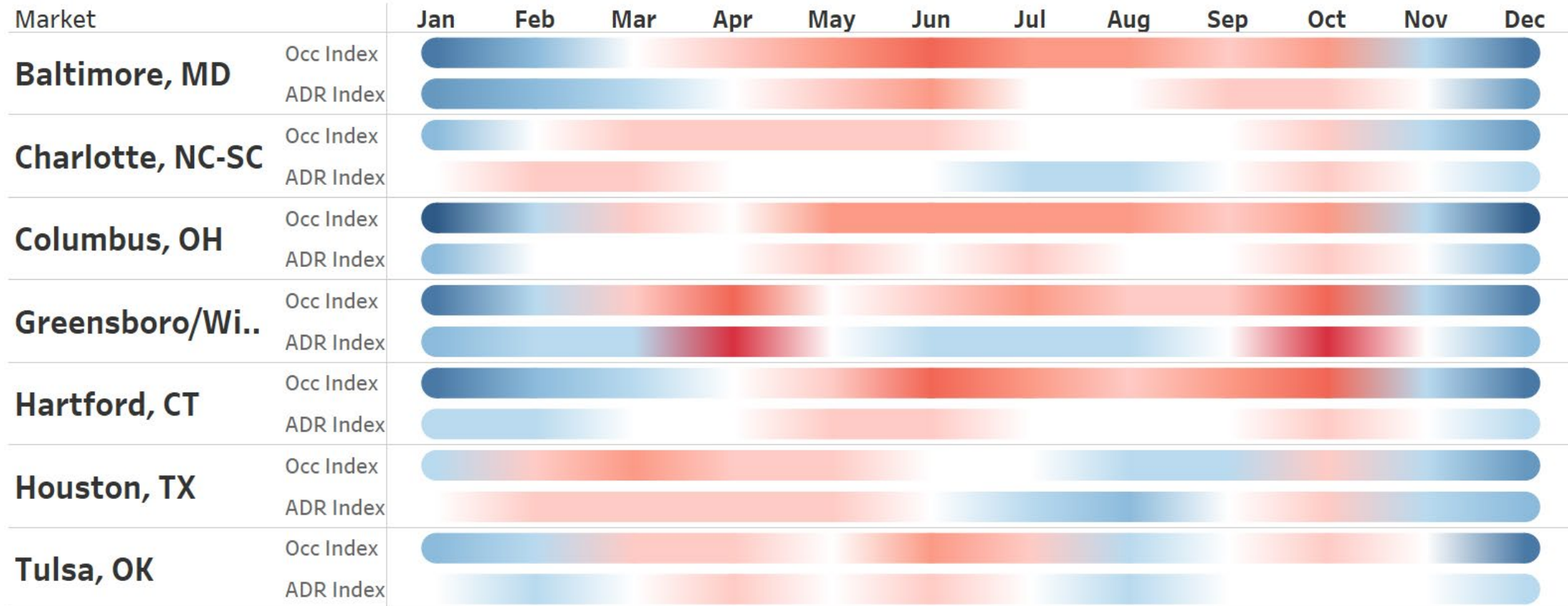


# Markets with Most Hotel Availability Sept-Feb

Markets Over 8,500 rooms w/ Avg. Occupancy under 75%, Rooms in 000's



## Market Seasonality - Occupancy & ADR Indices



## Selected US Metropolitan STR Markets Monthly Occupancy (Average - 2017-2019)

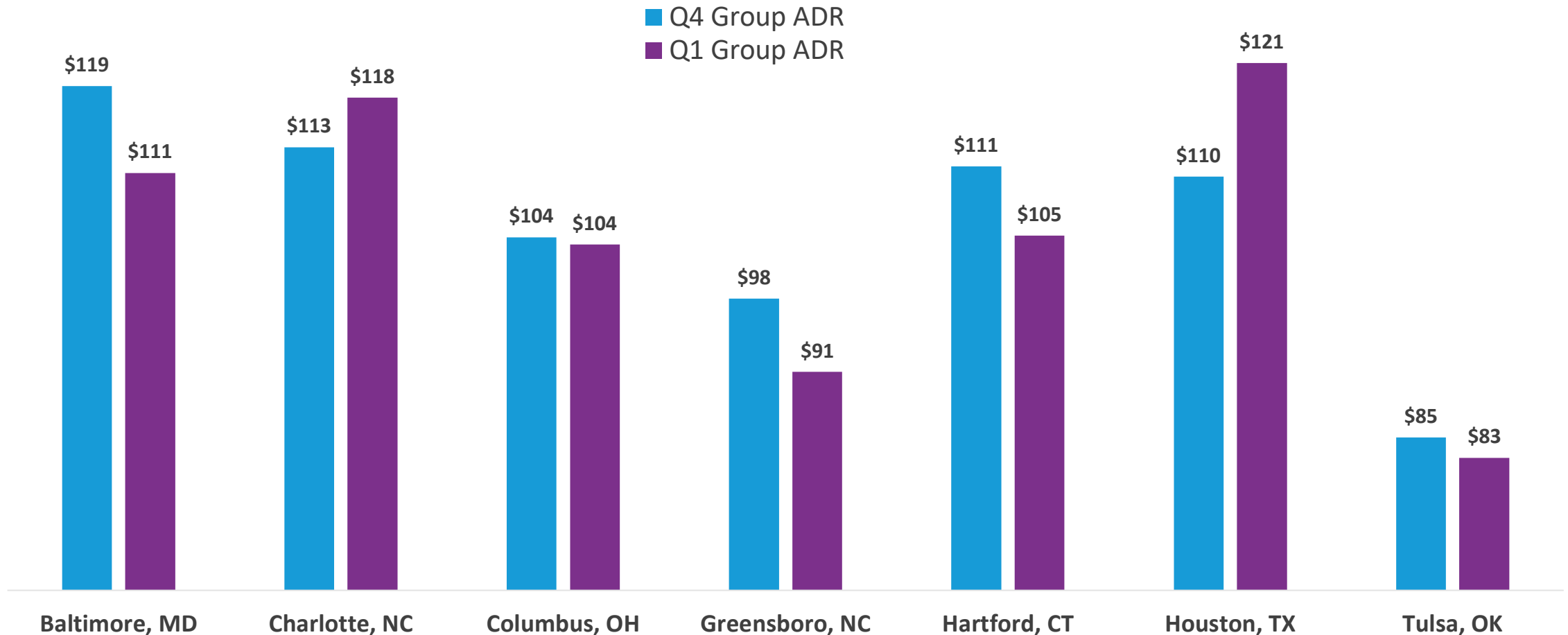


Market	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Room Supply
Baltimore, MD	51%	58%	68%	71%	74%	77%	73%	73%	69%	72%	64%	51%	23.5K
Charlotte, NC-SC	60%	68%	74%	73%	73%	75%	70%	71%	71%	74%	66%	56%	24.7K
Columbus, OH	49%	61%	69%	68%	72%	73%	75%	72%	69%	74%	63%	49%	19.0K
Greensboro/Winston Sal..	46%	56%	62%	68%	61%	63%	66%	62%	63%	69%	58%	46%	13.4K
Hartford, CT	50%	55%	58%	61%	67%	72%	69%	67%	69%	72%	59%	49%	8.9K
Houston, TX	60%	68%	71%	67%	65%	65%	64%	60%	60%	66%	60%	53%	61.0K
Tulsa, OK	51%	55%	61%	59%	58%	64%	59%	55%	56%	61%	58%	45%	11.2K



# Determining the Rate Options

Q1 & Q4 Avg. Group ADR



# Large Markets Grow Rapidly

Largest % In Top 26 Markets, March 2020



Market	Rooms In Construction	% Of Existing
Nashville, TN	5,878	12%
New York, NY	14,051	11%
Orlando, FL	8,737	7%
Miami/Hialeah, FL	3,897	7%
Boston, MA	3,802	6%
Los Angeles/Long Beach, CA	6,640	6%
Tampa/St Petersburg, FL	3,045	6%
Dallas, TX	5,751	6%
Detroit, MI	2,732	6%
Anaheim/Santa Ana, CA	3,211	6%

# Forecast as of March 30

## Key Performance Indicator Outlook (Absolute Values)

		<i>U.S. Outlook</i>		<b>For Comparison</b>
<b>Year</b>	<b>2019</b>	<i>2020 Forecast</i>	<i>2021 Forecast</i>	<b>2013</b>
<b>Occupancy</b>	66.1%	37.9%	59.7%	62.3%
<b>ADR</b>	\$131	\$113	\$117	\$110
<b>RevPAR</b>	\$87	\$43	\$70	\$68

**-20%**

# Question #2

To earn your Certified in Exhibition Management (CEM) credential, how many modules must be successfully completed?

## Answer

Nine (9) modules are required to earn a CEM credential



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HISTORY



# Prior Recessions

Shift in  
location

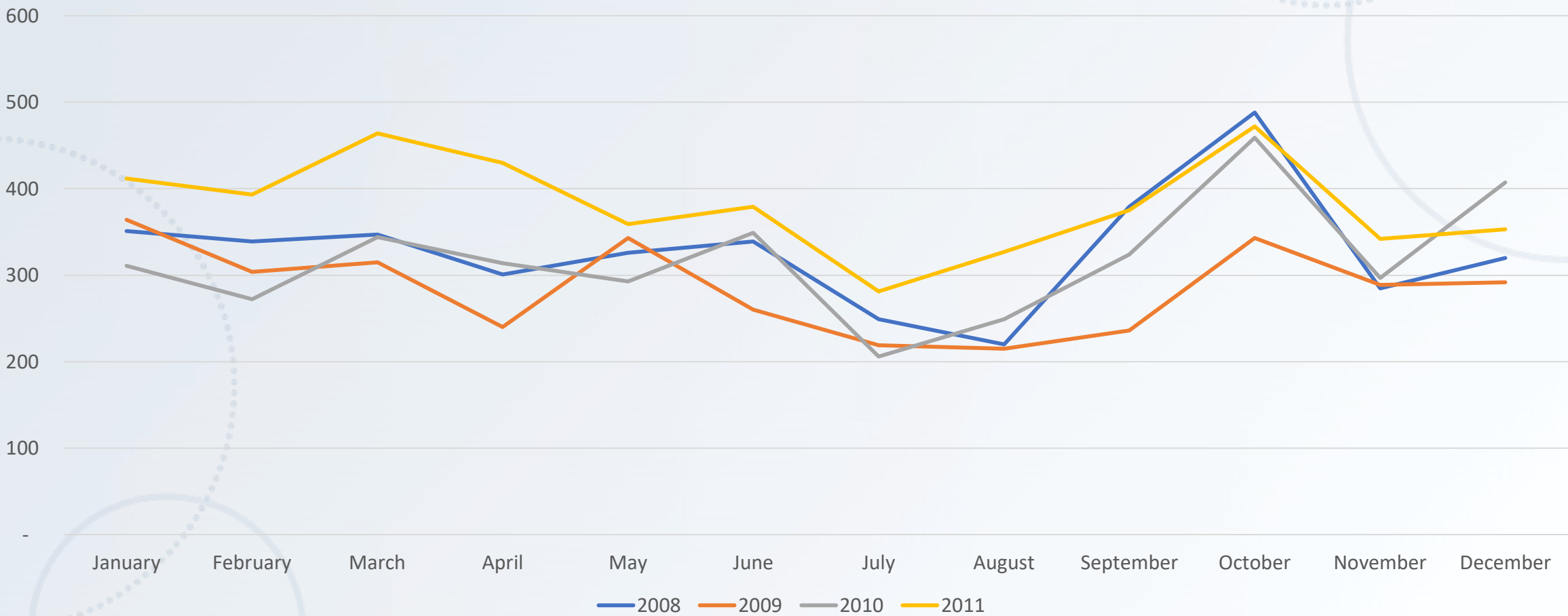
Shift in  
numbers

Shift in  
size



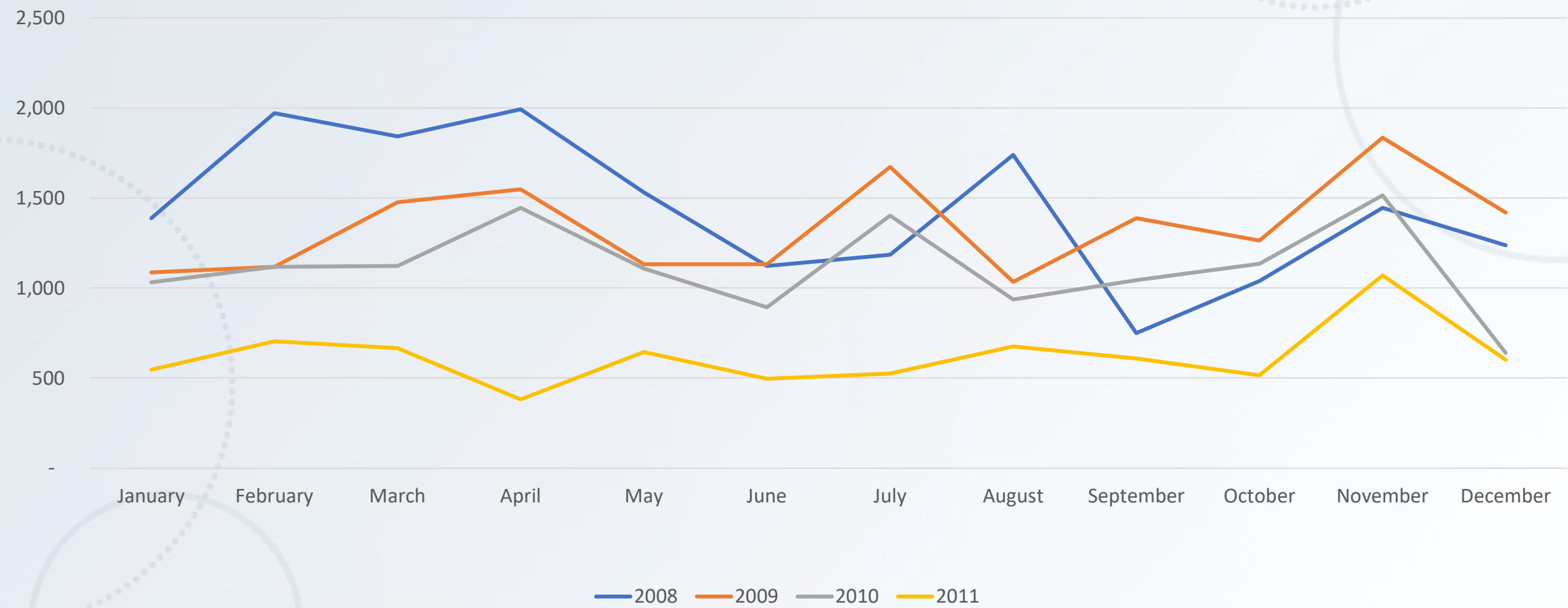
# Tertiary Market 2008-2011

Winston Salem Event Count 2008-2011

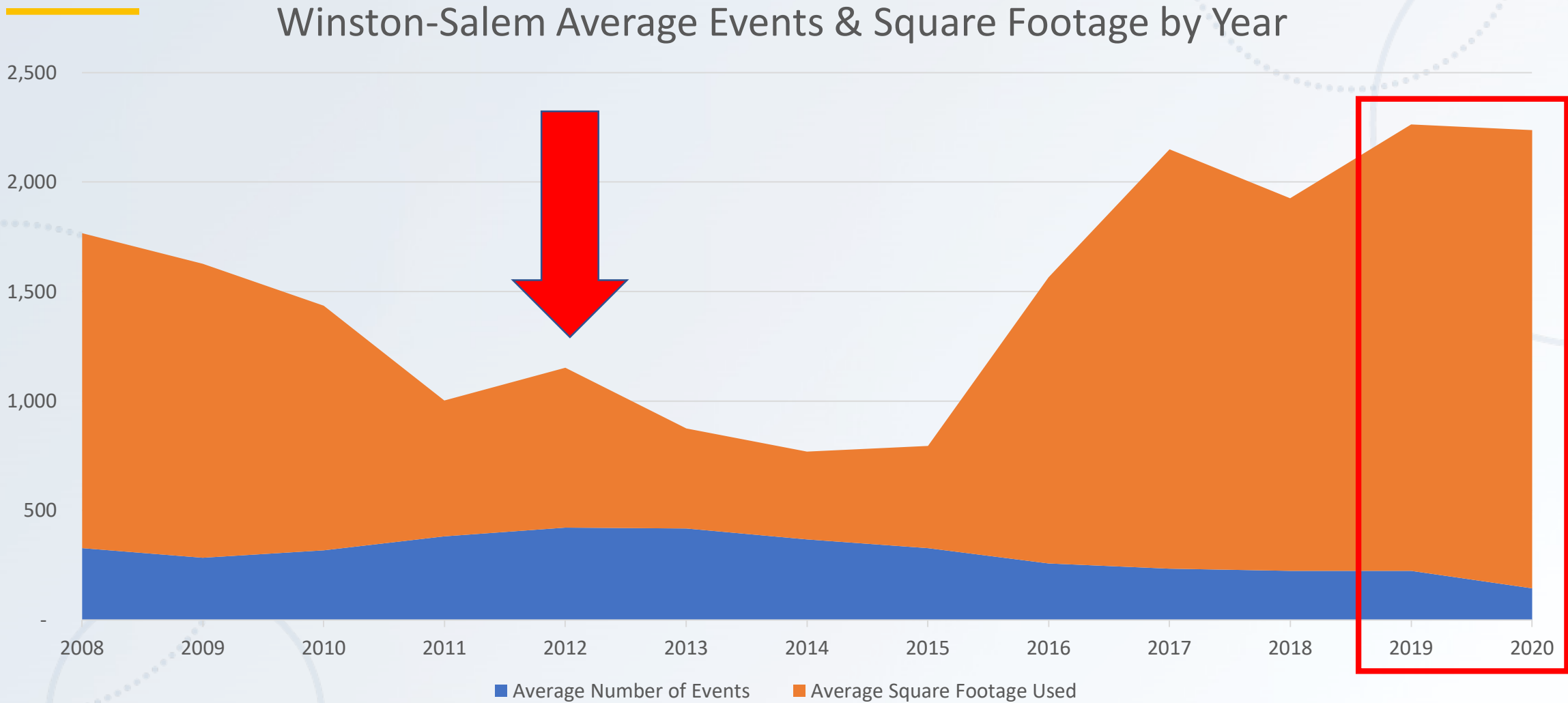


# Tertiary Market 2008-2011

Winston Salem Average Square Footage Used 2008-2011



# Tertiary Market 2008-2020



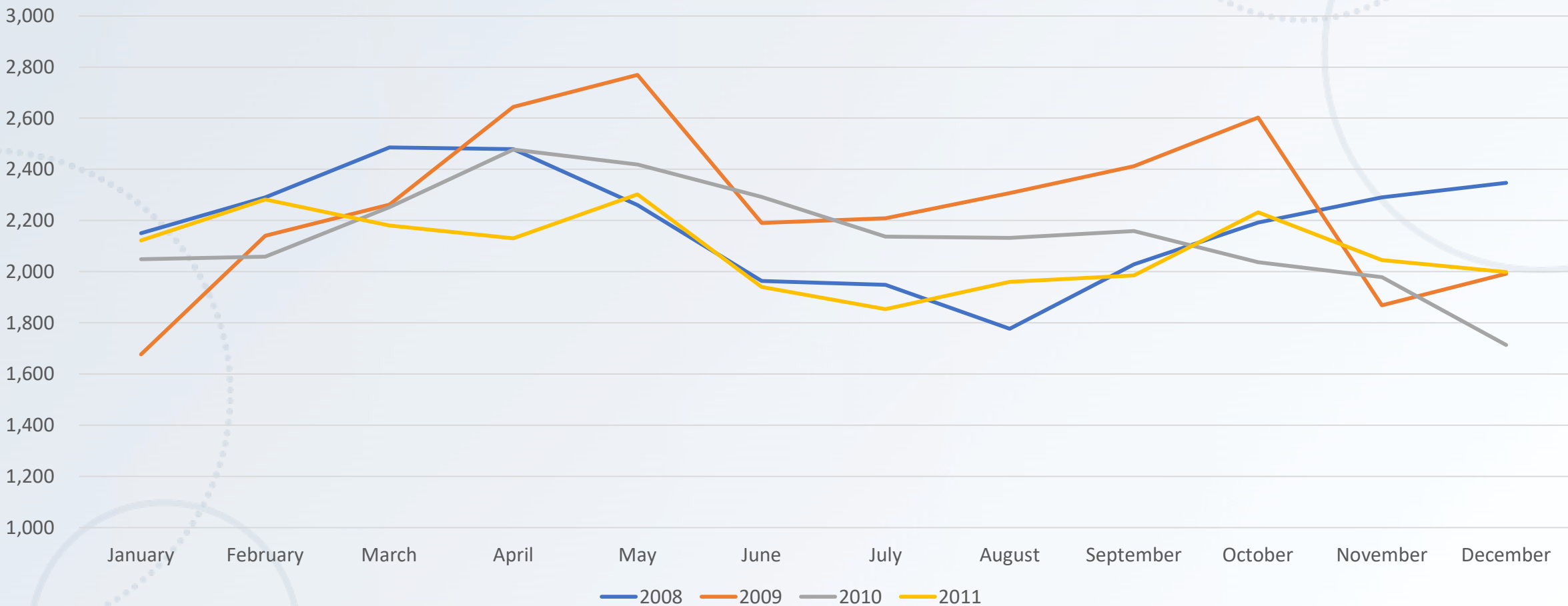
# Secondary Market 2008-2011

Hartford Event Count 2008-2011



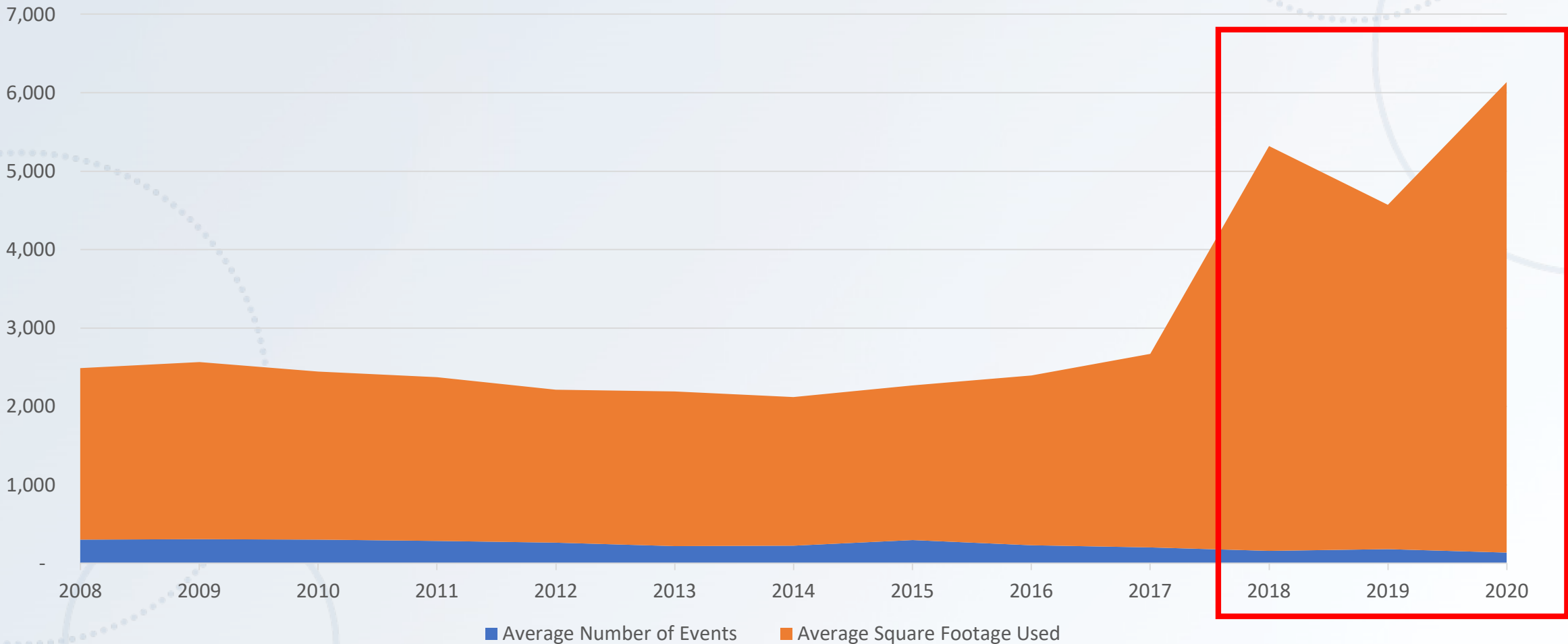
# Secondary Market 2008-2011

Hartford Average Square Footage Used 2008-2011



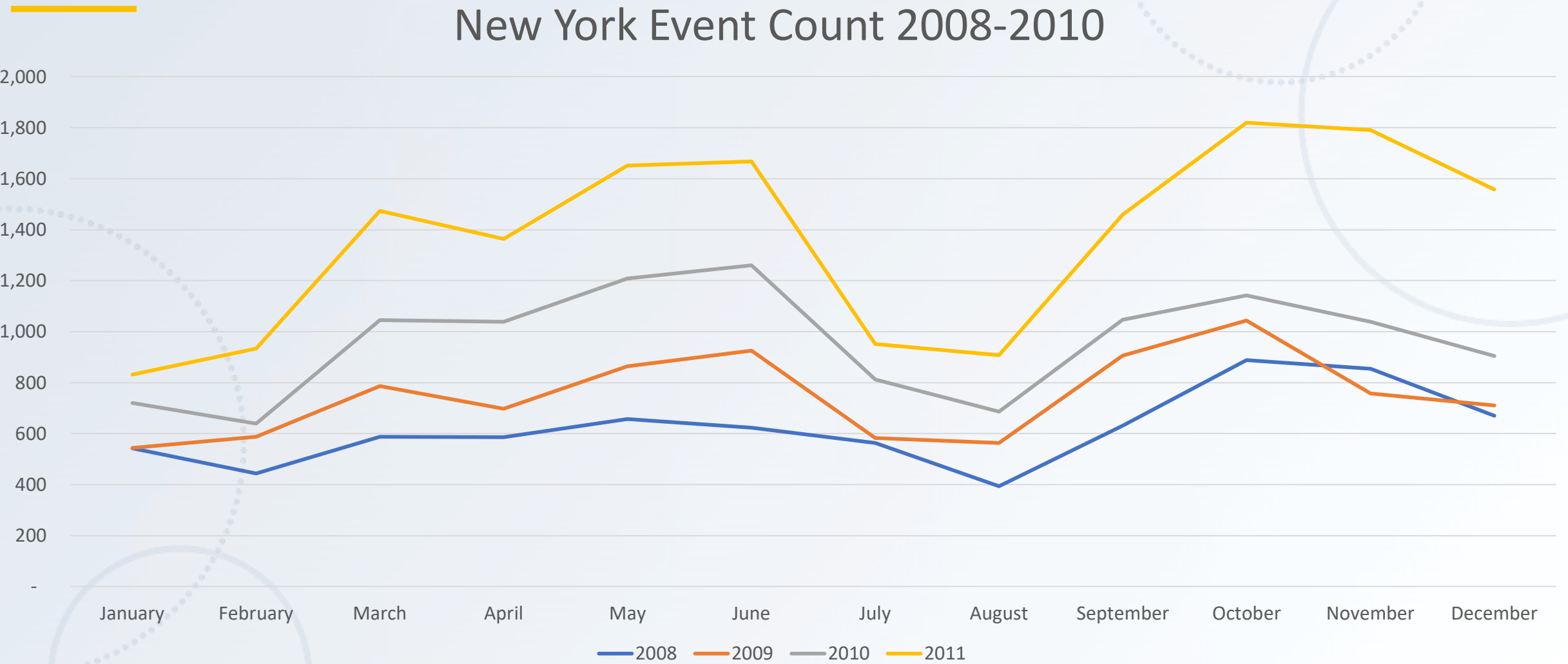
# Secondary Market 2008-2020

Hartford Average Events & Square Footage by Year



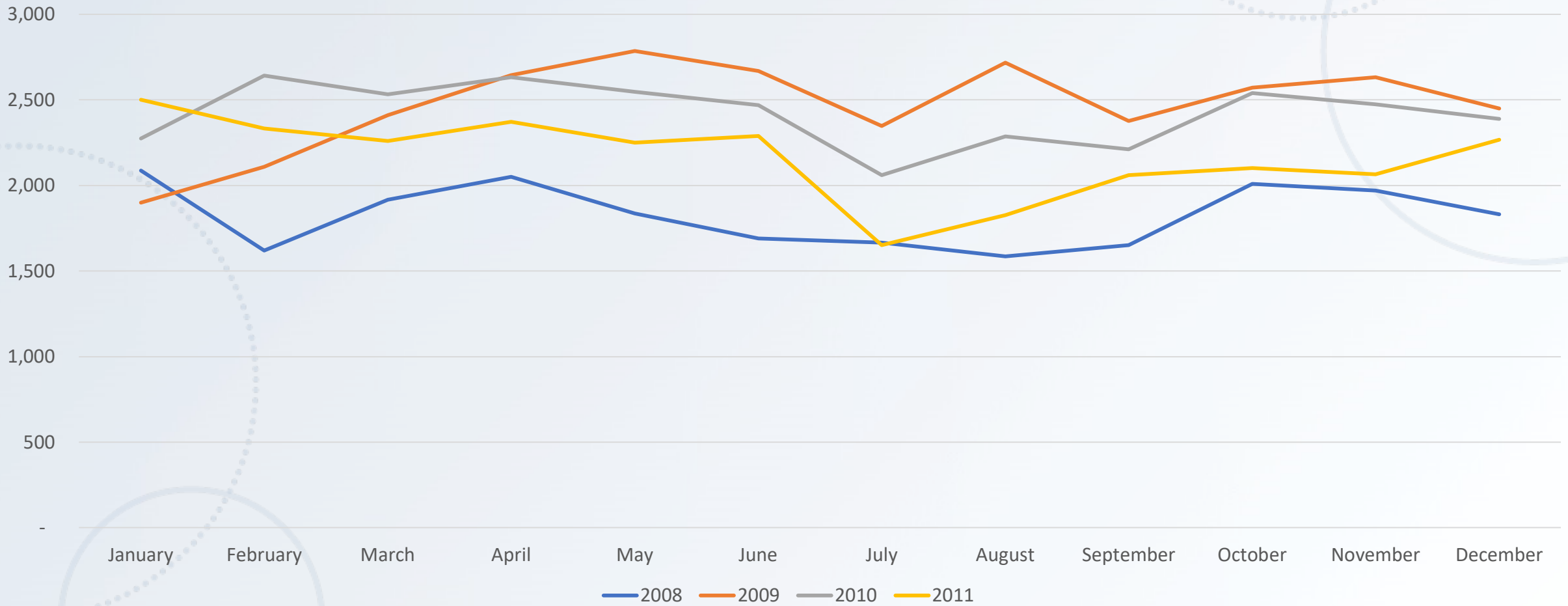
# Primary Market 2008-2011

New York Event Count 2008-2010



# Primary Market 2008-2011

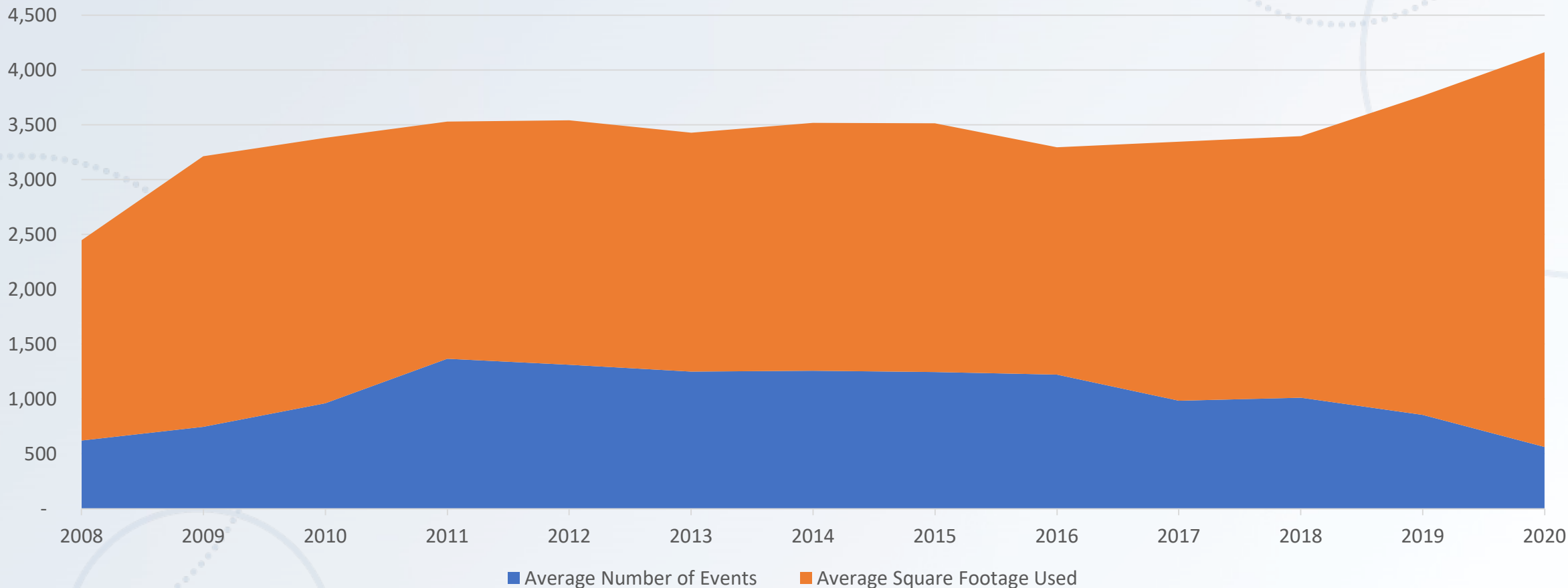
New York Average Square Footage Used 2008-2011





# Primary Market 2008-2020

New York Average Events & Square Footage by Year



A large crowd of people is seated in a stadium at night. The scene is dimly lit, with the primary light source being the stadium lights, which create a soft glow on the audience. The people are mostly seen from behind, looking towards the field. The text "What will recovery look like?" is overlaid in the center of the image in a white, sans-serif font.

What will recovery look like?

# Prior Recessions

Shift in  
location

Shift in  
numbers

Shift in  
size

Thank You

[kwhite@knowland.com](mailto:kwhite@knowland.com)





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# Question #3

What is one of the three non-profits that were highlighted in today's session?

## Answer

Michael J. Fox Foundation for Parkinson's Research, IAEE DC Chair's Charity [donate here](#) to support the Chair's Charity.

[Capital Area Food Bank](#)

[Humane Rescue Alliance](#)

# Resources and Reminders

- **Virtual IAEE Exhibition Day: June 3**

- No cost to participate
- Register at [www.iaee.com](http://www.iaee.com)

- **Industry Websites for Resources**

- [www.iaee.com](http://www.iaee.com)
- [www.eic.org](http://www.eic.org)
- [www.ceir.org](http://www.ceir.org)

- **Recording of Webinar**

- [www.iaeedc-chapter.com](http://www.iaeedc-chapter.com)