

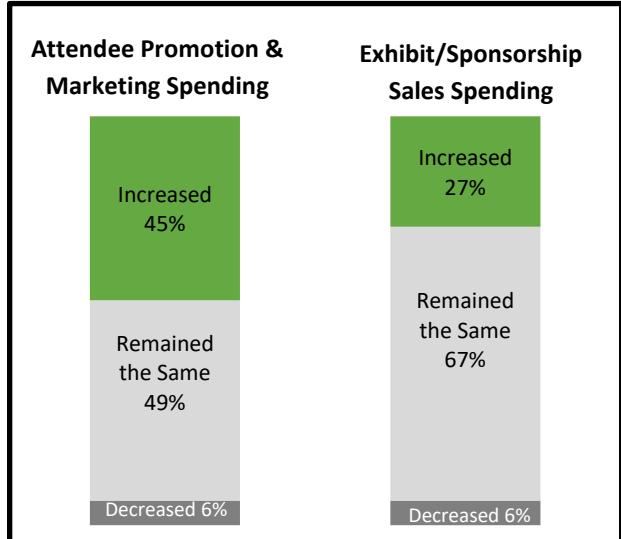
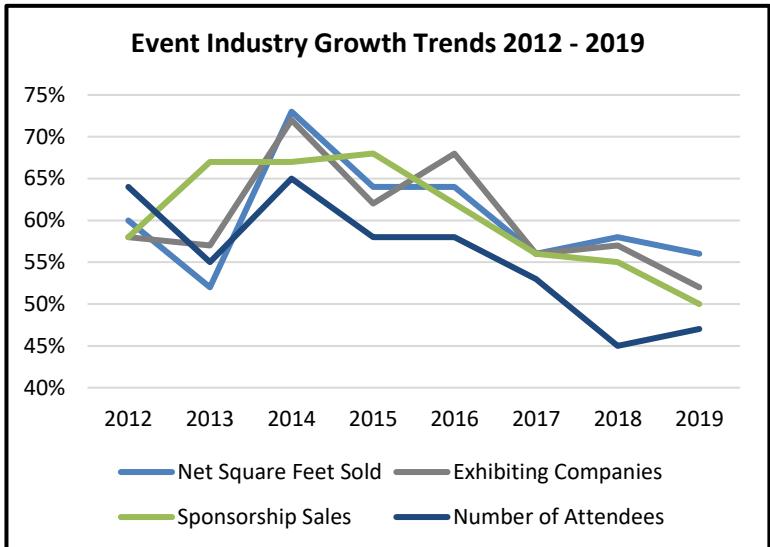
Exhibition & Convention Executive Forum Pulse, May 2019

Executive Summary

An online survey was developed and conducted by Freeman and Lippman Connects from March 26 – April 12, 2019. 201 executives responded.

While all areas continue to show **growth**, expectations are **more modest** than in previous years. While at least 50% of the respondents report that their events are growing in **number of exhibiting companies**, **net square feet of sold**, and **sponsorship sales**, growth in these areas is less than in previous years.

Attendee growth continues to be lagging performance area. Less than half (47%) feel that their attendance will grow this year.

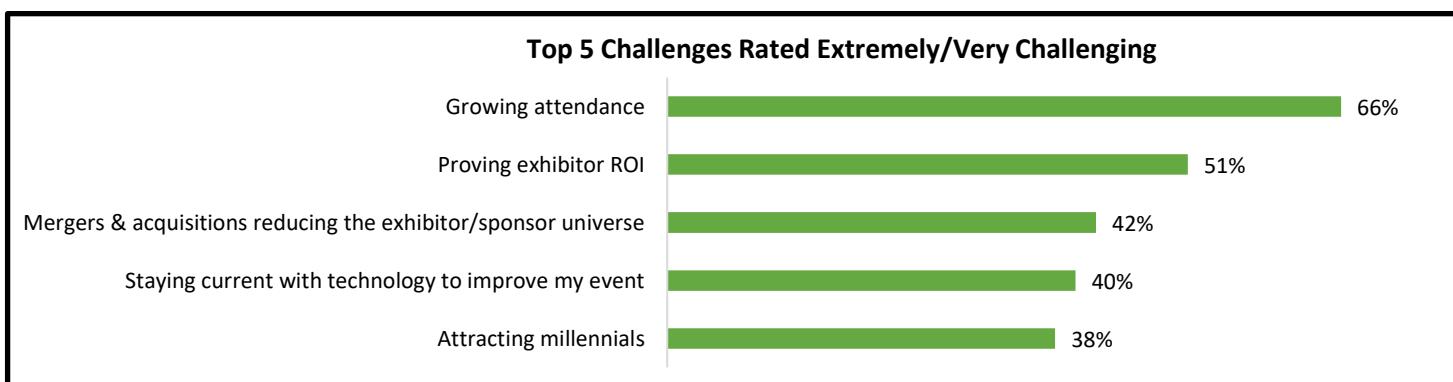


Nearly half (45%) are increasing their spending on **Attendee Promotion and Marketing** by an average of 9%.

This year slightly over one-quarter (27%) are increasing their spending on **Exhibit/Sponsorship Sales** by an average of 9%.

Profitability for over half of the respondent events (54%) continues to increase by an average of 8%. While still strong, this continues to trend downward and is now at a 5-year low. Similarly, the proportion that expects their event's profitability to increase continues to trend downward from a high of 59% in 2016 and 2017 to 52% last year to a low of 46% this year.

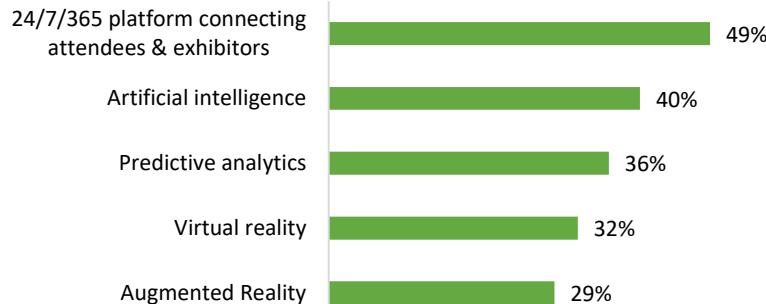
In keeping with the lower expectations for attendee growth, the **top challenge** among 66% of executives is **growing attendance** followed by the need to prove exhibitor/sponsor ROI.



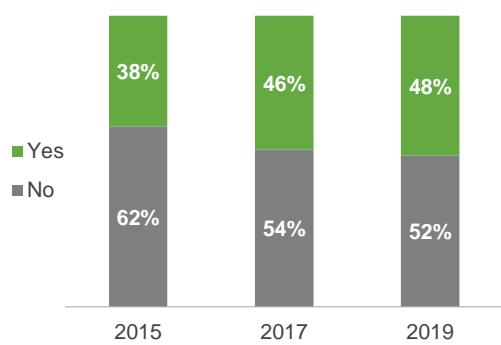
24/7/365 platforms continue to be anticipated as the **most disruptive new technology**, up significantly from last year (49% vs. 34%). The other most disruptive technologies are artificial intelligence, predictive analytics, virtual reality and augmented reality.

Compared to last year, gamification, which is the 6th most disruptive technology this year, is now anticipated to be significantly more disruptive to the event business - 22% vs. 12%.

Top 5 Most Disruptive Technologies



% Planning to Launch a New Event

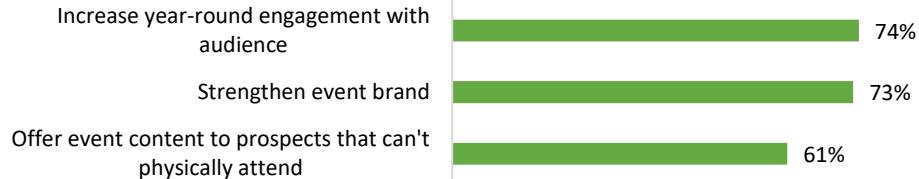


Comparing 2015 through 2019, significantly more event executives indicated they are now **planning to launch a new event**; nearly half (48%) reported plans to launch one in the next 36 months. Conferences/forums are the top events planned, up significantly from 2017 (44% vs. 33%). U.S. based exhibitions follow at 39%.

Technology continues to be the aspect that will receive the most budget in the next 12 months, followed by education, and special events on the exhibit floor. In the past year, more additions were made to marketing staff than sales; however, for the next 12 months, more executives indicated they have no plans to add staff in any area.

Inclusion of **digital extensions** has trended up over the last 4 years from 34% in 2015 to 39% in 2017 to 42% this year. The top reasons are increasing year-round audience engagement, strengthening event brand and offering content to prospects who can't physically attend.

Objectives in Adding/Considering Digital Extension



Composition of Respondents

- All respondents hold an executive level title.
- 69% of respondents are from associations, while 31% are independent organizers
- 62% of respondents represent large events of 125,000 or more net square feet
- 15% produce medical and healthcare events, 12% produce consumer goods/retail, and 9% produce food/beverage or industrial/heavy machinery & finished outputs or communications/IT events

For more information, please contact Jeff Stanley at 732-704-1324 or jeffrey.stanley@freemanco.com

To obtain the complete *ECEF Pulse* or for information about **ECEF**, contact Sam Lippman at 703-979-4904, sam@lippmanconnects.com, or visit lippmanconnects.com/ecef.