

FREEMAN[®]
event
research

OUTLOOK FOR A POST-VACCINE WORLD

REPORT 3 | MARCH 2021



overview





INTRODUCTION

We're seeing the highest positive sentiment and confidence index to date.

The fight against COVID-19 is far from over, but as new cases in the U.S. appear to be trending downward, attendee sentiment and confidence are trending upwards. The launch of the most recent wave, the sixth in our series, brings some long-awaited positivity regarding outlook, but concerns and challenges remain.

The past few months have brought upon an array of news and emotions — a slow start for the vaccine rollout to the emergence of more infectious variants of the virus — both potentially delaying our ability to arrive at a post-pandemic era. But even with unexpected detours, attendees are

showing signs of relief. For now, our study reveals that while concern for safety remain high relative to concern for financial health, overall safety concerns have decreased since the previous wave.

We're also seeing the highest positive sentiment and confidence index to date. Additionally, the return-to-events timeframe has accelerated with three-quarters indicating plans to attend by late fall/early winter. Vaccinations substantially boost confidence in attending in-person events — which bodes well for the industry as ~80% plan to get vaccinated (or already have).

As attendees plan for another few months of virtual-only events, event professionals will face shorter planning cycles for in-person events when they return. And time won't be the only hurdle to face. Planning for in-person will not only depend on overall attendance, but also exhibitor participation. All of this is further challenged by variability across region, industry, and event type.

While the road to achieve herd immunity is still ahead of us, the momentum in the vaccine rollout and decline in new cases is enough to give attendees hope.

respondent snapshot

ATTENDEES PROFILE

6,144

attendee responses

±1.2%

margin of error

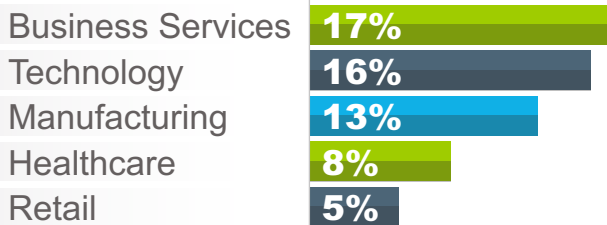
29%

of attendees are executives or C-level

ATTENDEES BY INDUSTRY

19%

are international attendees



EXHIBITORS PROFILE

1,341

exhibitor responses

±2.7%

margin of error

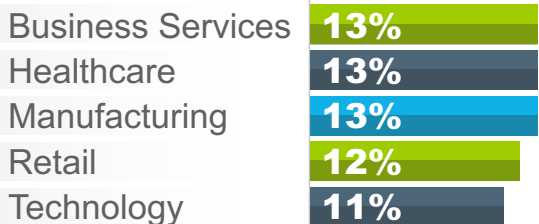
36%

of exhibitors are executives or C-level

EXHIBITORS BY INDUSTRY

64%

of exhibiting companies have 100 or fewer employees



Audience: Attendees and Exhibitors | Source: Sentiment Study

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

1

sentiment and confidence index are on the rise

Survey reveals the highest positive sentiment and confidence index to date.

2

time frame to attend in-person events has accelerated

Attendees expect to return to events more quickly than in previous waves with a majority planning to attend late fall/early winter of 2021.

3

rollout of vaccines has proven to be a major turning point

Vaccination substantially improves confidence and timeframe to attend in-person events.

4

design for the medium

Each medium has clear benefits and intentions for attendees, which means each should serve a unique purpose and provide a distinct outcome.



attendee lens: impact of covid-19

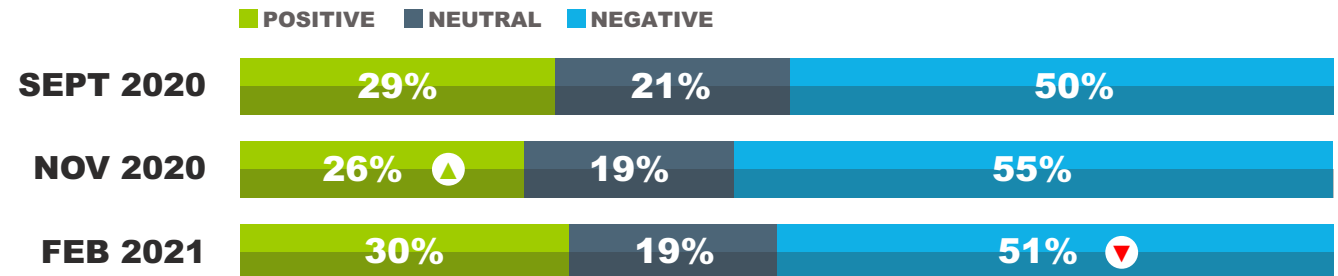
WHAT WE'RE SEEING

highest positive sentiment to date

- Overall positive sentiment increased from 26% to 30% and negative sentiment decreased from 55% to 51%.
- 'Ready', 'Excited', and 'Go' make a stronger appearance (unaided).
- 'Cautious' remains the top word across all industries (unaided).



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)

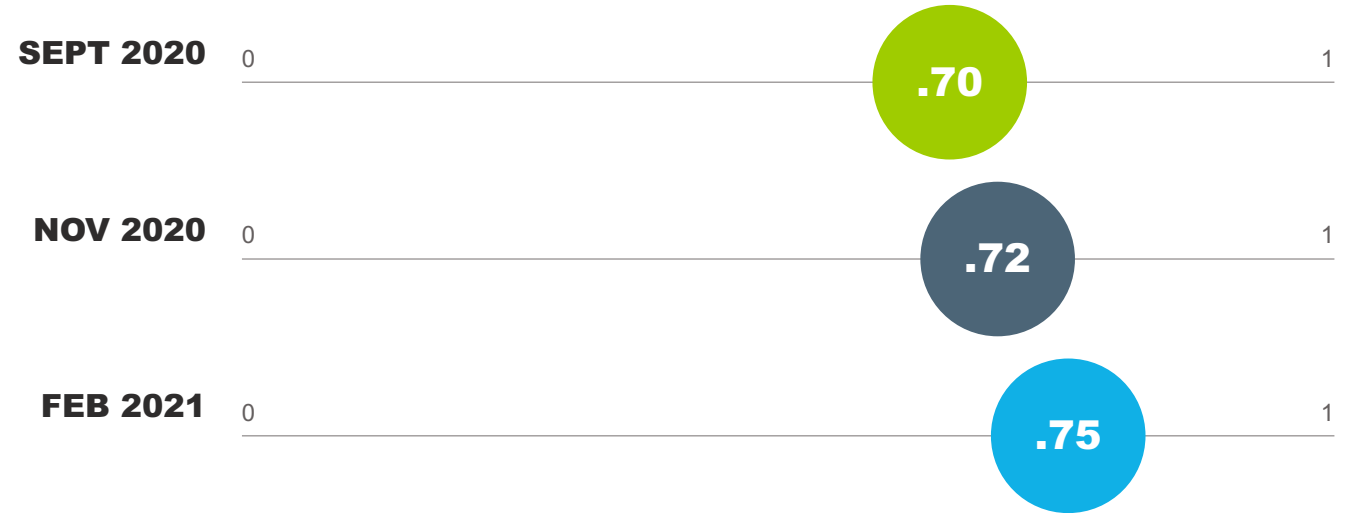
Statistically significant difference from previous wave. ▲ ▼

WHAT WE'RE SEEING

attendee confidence is growing

- The Confidence Index has been trending up across the past three waves — first time we see this pattern.
- The Confidence Index is up cross all industry sectors.

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.

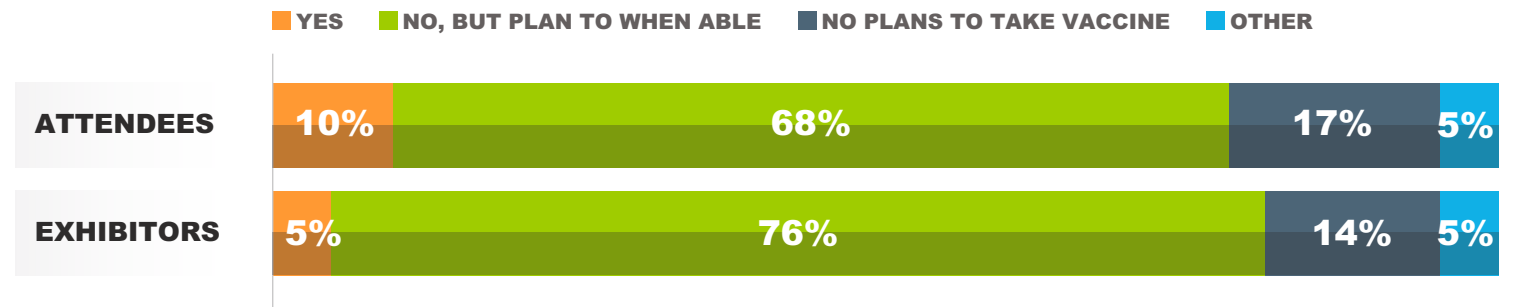
vaccinations

WHAT WE'RE SEEING

most attendees and exhibitors plan to get vaccinated

- 68% of attendees and 76% of exhibitors plan to get vaccinated when able.
- 10% of attendees have already been vaccinated, while 17% do not plan to.
- 5% of exhibitors have already been vaccinated, while 14% do not plan to.
- Plans for vaccination/those vaccinated is highest among healthcare followed by the technology sector.
- Manufacturing is least likely to get vaccinated, yet most aggressive in return to in-person timing.

HAVE YOU BEEN VACCINATED FOR COVID-19?



Audience: Attendees and Exhibitors | Source: Sentiment Study



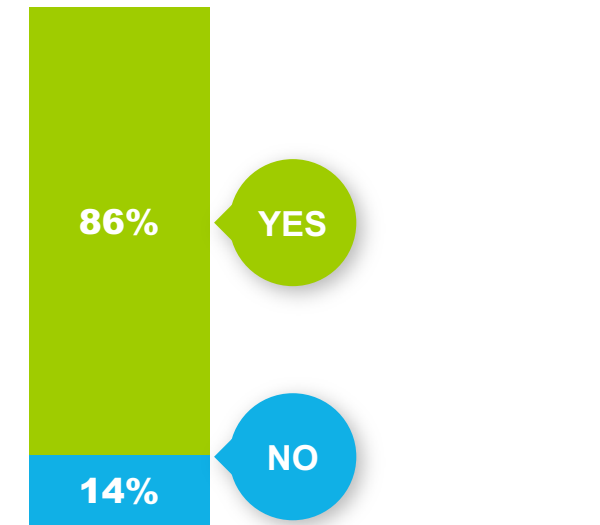
Have you been vaccinated for Covid-19?

WHAT WE'RE SEEING

vaccination will substantially boost confidence in attending in-person

- Of the 78% of attendees who said they were already vaccinated or plan to be, 86% say vaccinations increase their confidence when it comes to attending in person events.

WILL VACCINATION INCREASE CONFIDENCE ATTENDING IN-PERSON EVENTS?



FEB 2021

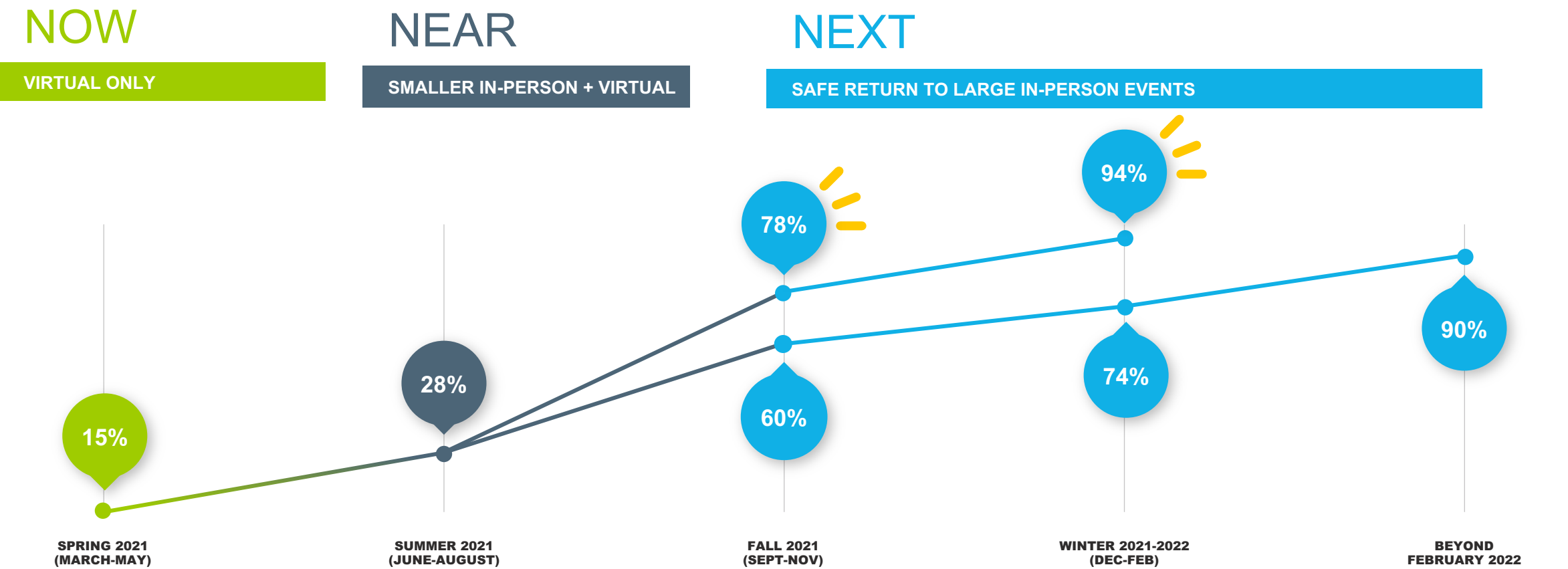
Audience: Attendees | **Source:** Sentiment Study
Base: Those who have been vaccinated or plan to be



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

updated outlook based on vaccinations

Outlook improves as a result of the vaccine. As a result, we launch into the NEXT phase much sooner as a greater percentage of attendees are willing to attend in-person events.



Audience: Attendees | Source: Sentiment Study



critical conclusions

1

aim for quality over quantity

Qualified attendees for fall in-person events is essential. Use this time NOW as an opportunity to lean in on virtual to plan to create even more valuable in-person events in the future. When we return to in-person events, we're still going

to have to manage size for some time, which means we need to distill quantity into quality. This means we must shift from a registration to invitation model to get the most qualified attendees to the smaller in-person events.

ATTENDEES

Start with a clear and prioritized audience segmentation

Identify most promising personas for the in-person

Attract and reach the most important segments through focused marketing



MESSAGING

Increase engagement through focused, curated content based on attendee type/journey

Focus on personalized content

Message, measure, rinse-repeat

2

do more with data

Take advantage of the incredible opportunity to understand your audience's behaviors and preferences across mediums. Experiment with new engagement ideas and test the results of those experiments through data analysis. Virtual events can provide the most robust attendee tracking imaginable if you properly plan to harness the data. If we take the time now, then we will reap the benefits later as we transition into hybrid engagement. Measurement consistency across the entire journey and across mediums will only enable us to deliver more tailored and meaningful experiences to our audiences.



about the data solutions team

Freeman's Data Solutions team and expertise has been built on the foundation of Freeman's 2016 acquisition of Exhibit Surveys, Inc. (ESI), a company established in 1963 with the vision of conducting research and measurement exclusively for event marketing activities and for all major industry constituents including event organizers, attendees, exhibitors, venues and CVBs.

Freeman continues to invest heavily in its Data Solutions team's capabilities to maintain its position as the premier research and measurement source in our industry and provide deeper analytics and insights for its clients as well as for the industry.

The Data Solutions team works closely with our strategy team to ensure our strategic recommendations are rooted in data and insights.

Our foundation and approach put us in an enviable and unmatched position to guide the event industry as we navigate through this difficult period of the COVID-19 pandemic.

additional resources

EXPLORE AND LEARN MORE

We have additional resources that will help your organization conquer the **NOW**, **NEAR** and **NEXT** for live events. Freeman strategy and data expertise spans across four primary areas, including business, experiential, marketing and content, and digital and data.

Our research is available for purchase at research.freeman.com.

thank
you!

Have questions?

Reach out to our strategy
and data teams at

research@freeman.com

This report consolidates and summarizes opinion-based survey response information and is not intended to represent findings of fact or make fact-based claims as to when live, in-person events may recommence. Any modeling, analytics, projections, recommendations, analysis or advice provided by Freeman herein (collectively, the "Information") are subject to inherent uncertainty, and the Information could be materially affected if any underlying opinions, assumptions, conditions, information or factors are inaccurate, incomplete or should change. Actual results may differ materially from the Information, and Freeman offers no verifiable, fact-based conclusions resulting from the Information. The Information is provided solely for your benefit, and does not constitute, and is not intended to be a substitute for, actuarial, accounting or legal advice, for which you should consult your own professional advisors. Except as may be expressly set forth herein, Freeman makes no representation or warranty in or with respect to this document, shall have no obligation to update the Information and shall have no liability to you or any other party with regard to the Information. This report contains proprietary, confidential information of Freeman and may not be quoted or extracted from, shared with any third party in any medium or used as a basis from which to create derivative reports or analysis without Freeman's express prior written consent or as otherwise authorized by Freeman.

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