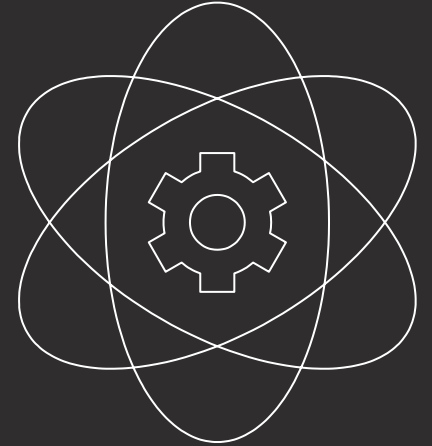


FREEMAN[®]

COVID-19 Event Marketer Sentiment Research

(Topline Results)



Wave 1: April 2020

CONFIDENTIAL

Topline Findings

Respondent Profile: Representative of high-quality marketer (with decision making power)

Over half determine event strategy; and ¾ have significant influence on event, sponsorship and promotional strategy

2/3 are director level or above (CMO,EVP,SVP,VP)

They represent organizations with average annual spend of \$4.7M on marketing and 2,500 employees

Top industries represented include: Business Services (22%), Communications/IT (17%), Medical/Healthcare (9%)

Effects of COVID-19 on Events/ Sponsorships/ Promotions

Almost half expect to start planning live events in 4-6 months

- The availability of a COVID-19 vaccine is the most frequently mentioned factor that will increase confidence in participating in live events; followed by the availability of a treatment drug

About 40% indicate their approach to events will not change post COVID-19. However, 26% will only use F2F when they cannot use digital and 20% will default to digital

Over half will produce more digital events and/or always have a digital component to their live events; 1/3 will host smaller events (limited to an average of 69 participants)

Marketing budgets dropping from 39% to 31%

- 25% report marketing on hold; 25% are allocating budgets elsewhere; 21% have seen budgets cut

6 in 10 holding digital event

- Key challenges with digital events----Engaging audience (66%), driving audience to event (57%) and learning new technology platforms (53%)

Methodology & Response

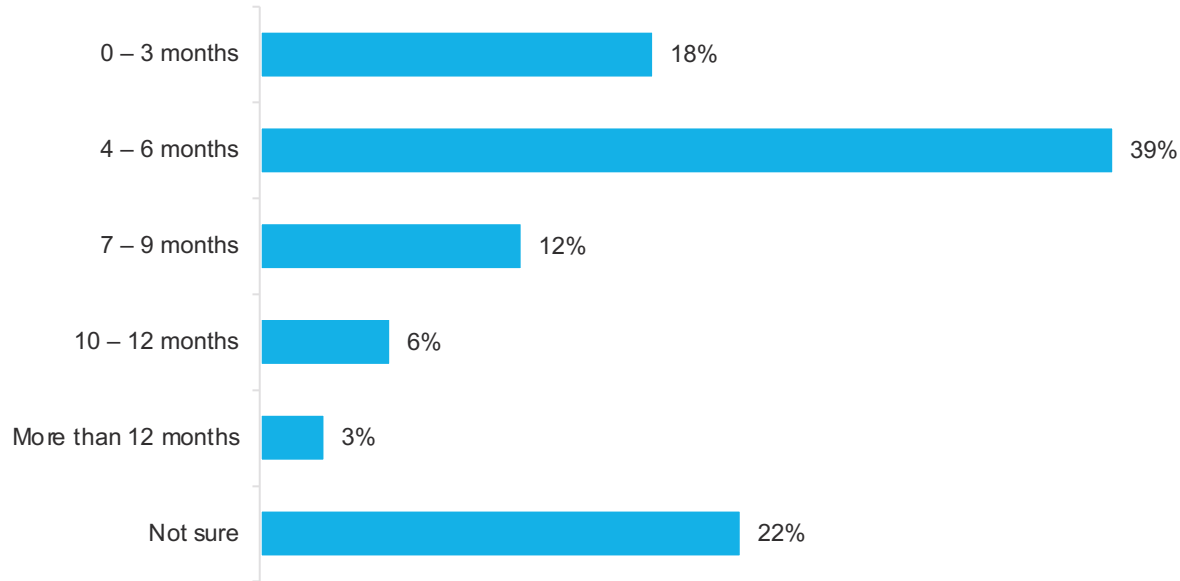
The survey was conducted online.

Throughout the report, all bases are total except where noted.

	Total
Sample Size	21,755
Number of Responses	231
Response Rate (excluding undeliverable emails)	1.1%
Maximum Statistical Error @95% Confidence	±6.4%
Survey Period	April 10 – 21, 2020
Incentive	1 of 5 \$100 Amazon gift cards

2/5 will start planning live events sometime between August – October

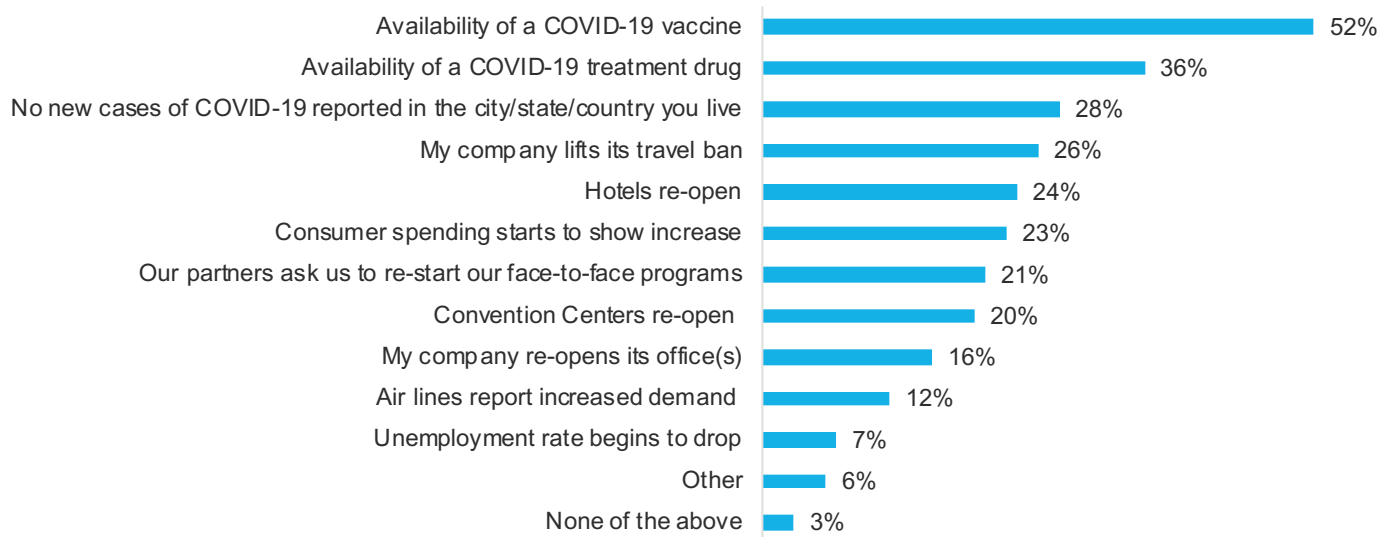
Timeframe for Planning Face-to-Face Live Events



Q15. When is your company going to start planning face-to-face live events, sponsorships or promotions?

The availability of a COVID-19 vaccine is the most frequently mentioned factor that will increase confidence in participating in live events

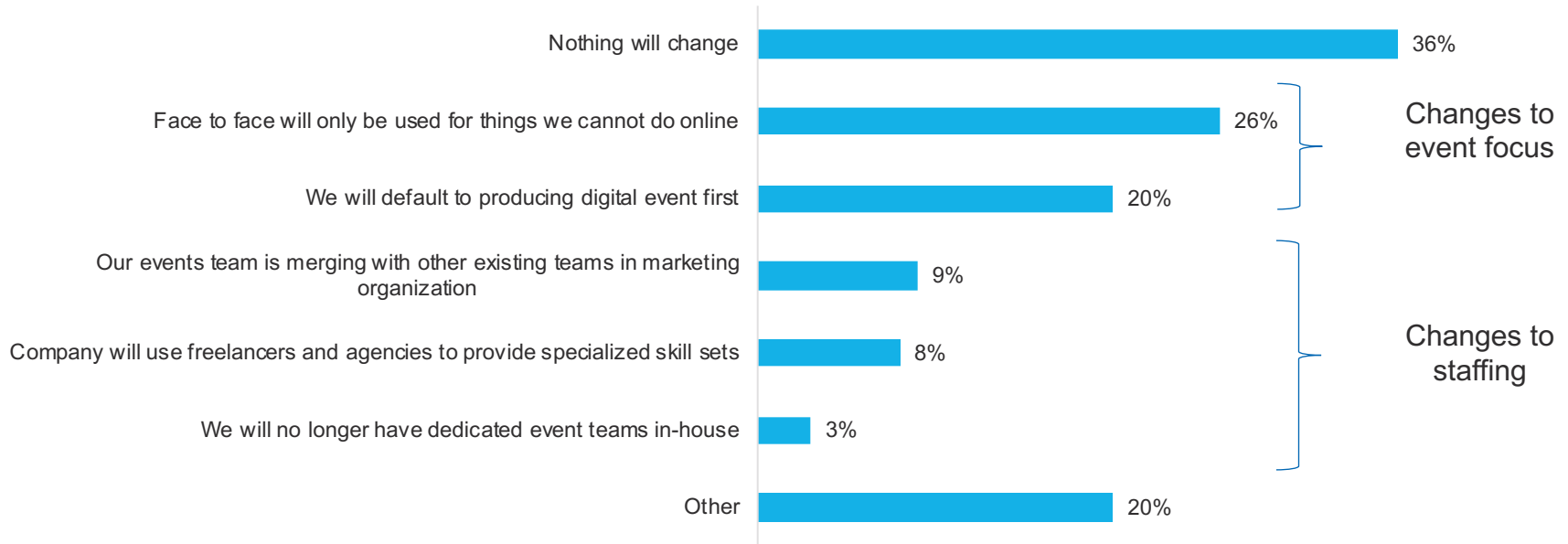
Factors that Will Increase Confidence in Participating in Live Events



Q14. Which of the following factors will increase your confidence in exhibiting at/producing live events? Select up to 3 factors.

Only 1/3 think their company will not make any changes following COVID-19, regarding live event staffing

Changes to Events/Sponsorships/Promotions Approach



Q11. Following the COVID-19 pandemic, how will your company's approach to staffing its events, sponsorships & promotion team(s) change? Select all that apply.

Digital become increasingly important in event strategies

69
Average
Number of
Participants
Limited To
Base (n=83)

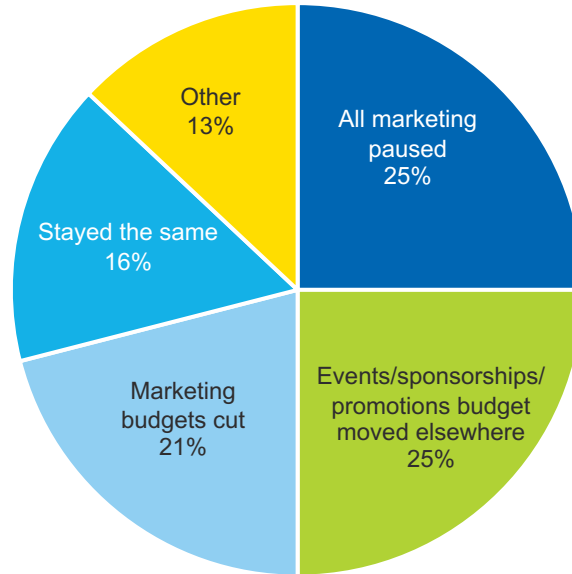
Changes to Event Strategy	
Digital Event Strategy	
Produce more digital events	52%
Always have a digital component for any event, sponsorship or promotion	52%
Update our pricing strategies to include a digital only format	15%
Smaller/Regional Events	
Host small events with limited number of participants	36%
Move to 1-day events with exclusive content	28%
Produce more regional road shows	19%
Only host internal face-to-face events	5%
Live Events	
Focus live events on content that cannot be delivered digitally	33%
Reduce the number of live events my organization produces	29%
Change our cancellation policies	29%
Limit or avoid hosting programs in large conference centers or convention centers for some period of time	28%
Content presentation and formats will change	26%
Community will have a bigger role in our face-to-face programs	14%
Host events in alternative venues (hotels, museums, open air stadiums, etc.)	11%
Invest in more consumer events (Major sporting events, Music Festivals, etc.)	8%
Invest in more 3 rd party tradeshow sponsorships & exhibits	7%



Q13. What changes will you/your organization make to your event strategy post COVID-19? Select all that apply.
Follow-up – How many participants will you limit the event to?

Most have paused marketing efforts or moved spend away from live events

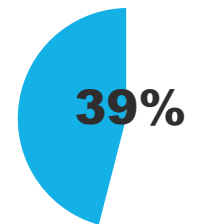
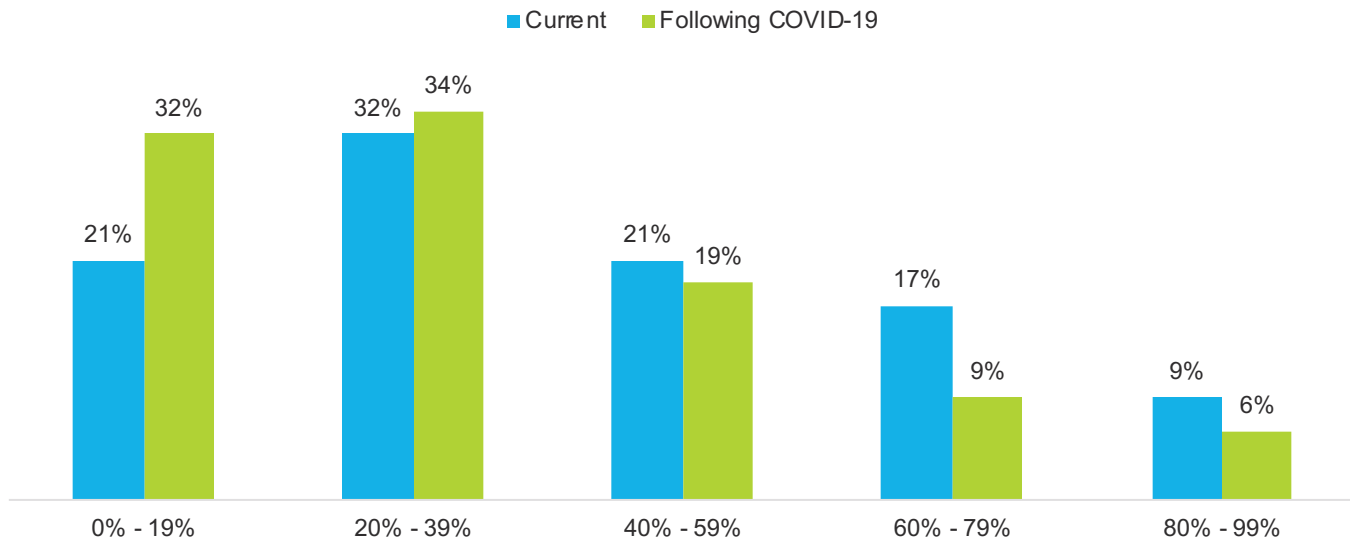
Changes Made to Marketing Spend During COVID-19 Pandemic



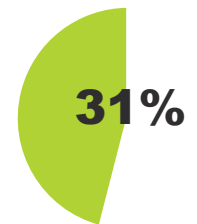
Q6. During this COVID-19 pandemic, how has your marketing spend changed: Select one.

Marketing spend on live events drops from 39% to 31%

Proportion of Marketing Spend Dedicated to Events/Sponsorships/Promotions



Current Average

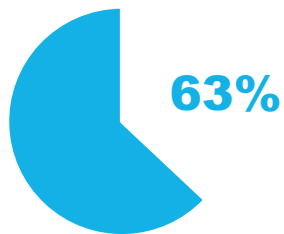


Following COVID-19 Average



Q5/10. For your current fiscal year (prior to the COVID-19 pandemic)/Following the COVID-19 pandemic, what percentage of your organization's marketing budget is/was dedicated to events/sponsorships/promotions?

Over half are hosting a digital event; their biggest challenge is engaging the audience

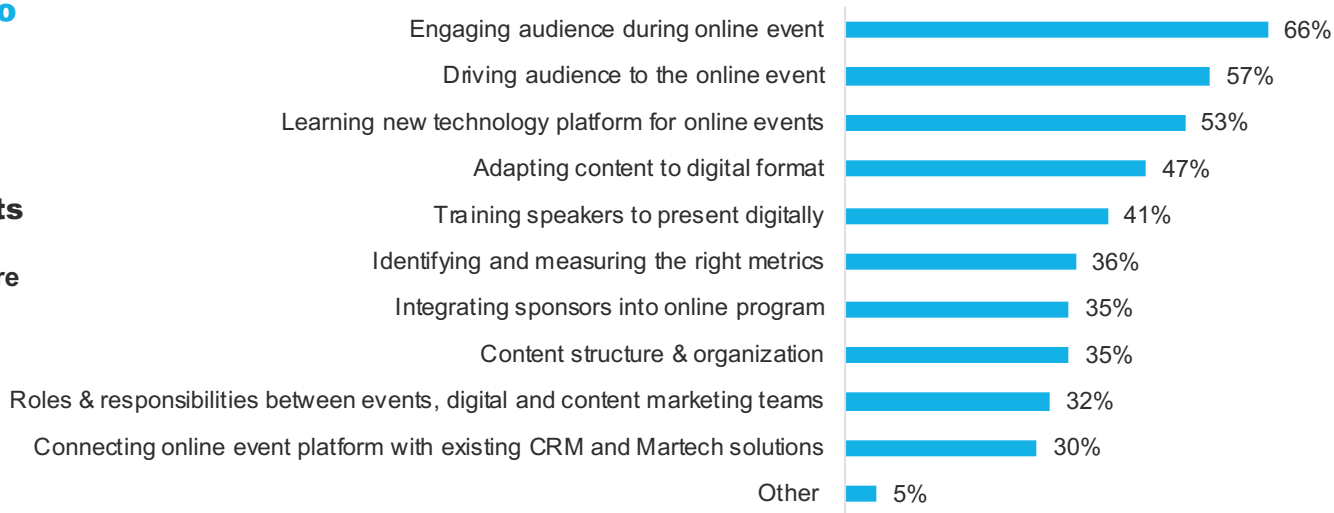


**Of Companies Are
Hosting Digital Events**

37% are not/or are not sure

Challenges with Digital Events

Base: Those that Are Hosting Digital Events (n=145)



Q7. Is your company hosting digital events during the COVID-19 pandemic?

Q8. What are some of your / your team's challenges with digital events? Select all that apply.

Respondent Profile

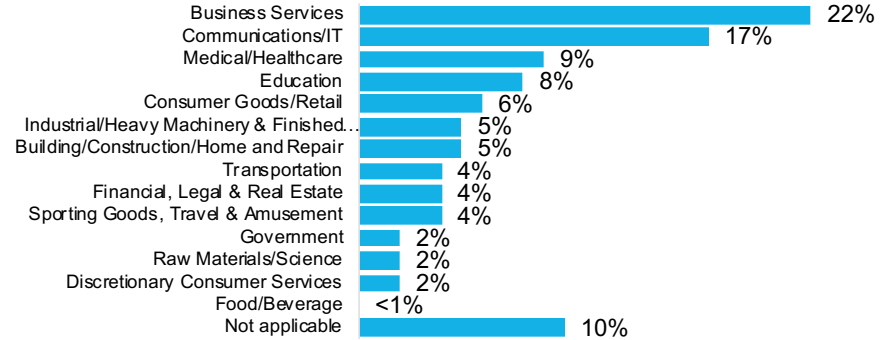
Job Title



Role in Events



Primary Type of Business



Annual Spend on Marketing

Including Events, Sponsorships & Promotions

Under \$1M	35%
\$1M to < \$5M	26%
\$5M < \$10M	5%
\$10M < \$15M	5%
\$15 million or more	12%
Don't know	4%
Prefer not to say	13%
AVERAGE (excluding "Don't know" and "Prefer not to say")	\$4.7M

