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.

<table>
<thead>
<tr>
<th>Total</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Size</td>
<td>21,755</td>
</tr>
<tr>
<td>Number of Responses</td>
<td>231</td>
</tr>
<tr>
<td>Response Rate (excluding undeliverable emails)</td>
<td>1.1%</td>
</tr>
<tr>
<td>Maximum Statistical Error @95% Confidence</td>
<td>±6.4%</td>
</tr>
<tr>
<td>Survey Period</td>
<td>April 10 – 21, 2020</td>
</tr>
<tr>
<td>Incentive</td>
<td>1 of 5 $100 Amazon gift cards</td>
</tr>
</tbody>
</table>
2/5 will start planning live events sometime between August – October

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

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 3 months</td>
<td>18%</td>
</tr>
<tr>
<td>4 – 6 months</td>
<td>39%</td>
</tr>
<tr>
<td>7 – 9 months</td>
<td>12%</td>
</tr>
<tr>
<td>10 – 12 months</td>
<td>6%</td>
</tr>
<tr>
<td>More than 12 months</td>
<td>3%</td>
</tr>
<tr>
<td>Not sure</td>
<td>22%</td>
</tr>
</tbody>
</table>
The availability of a COVID-19 vaccine is the most frequently mentioned factor that will increase confidence in participating in live events.

<table>
<thead>
<tr>
<th>Factors that Will Increase Confidence in Participating in Live Events</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of a COVID-19 vaccine</td>
<td>52%</td>
</tr>
<tr>
<td>Availability of a COVID-19 treatment drug</td>
<td>36%</td>
</tr>
<tr>
<td>No new cases of COVID-19 reported in the city/state/country you live</td>
<td>28%</td>
</tr>
<tr>
<td>My company lifts its travel ban</td>
<td>26%</td>
</tr>
<tr>
<td>Hotels re-open</td>
<td>24%</td>
</tr>
<tr>
<td>Consumer spending starts to show increase</td>
<td>23%</td>
</tr>
<tr>
<td>Our partners ask us to re-start our face-to-face programs</td>
<td>21%</td>
</tr>
<tr>
<td>Convention Centers re-open</td>
<td>20%</td>
</tr>
<tr>
<td>My company re-opens its office(s)</td>
<td>16%</td>
</tr>
<tr>
<td>Airlines report increased demand</td>
<td>12%</td>
</tr>
<tr>
<td>Unemployment rate begins to drop</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>None of the above</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

**Changes to Events/Sponsorships/Promotions Approach**

- **Nothing will change** 36%
- **Face to face will only be used for things we cannot do online** 26%
- **We will default to producing digital event first** 20%
- **Our events team is merging with other existing teams in marketing organization** 9%
- **Company will use freelancers and agencies to provide specialized skill sets** 8%
- **We will no longer have dedicated event teams in-house** 3%
- **Other** 20%

Only 1/3 think their company will not make any changes following COVID-19, regarding live event staffing.
Digital become increasingly important in event strategies

### 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 3rd 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?
Q6. During this COVID-19 pandemic, how has your marketing spend changed: Select one.

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

Changes Made to Marketing Spend During COVID-19 Pandemic

- All marketing paused 25%
- Marketing budgets cut 21%
- Events/sponsorships/promotions budget moved elsewhere 25%
- Stayed the same 16%
- Other 13%
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?

Marketing spend on live events drops from 39% to 31%
Over half are hosting a digital event; their biggest challenge is engaging the audience.

### Challenges with Digital Events

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

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Engaging audience during online event</td>
<td>66%</td>
</tr>
<tr>
<td>Driving audience to the online event</td>
<td>57%</td>
</tr>
<tr>
<td>Learning new technology platform for online events</td>
<td>53%</td>
</tr>
<tr>
<td>Adapting content to digital format</td>
<td>47%</td>
</tr>
<tr>
<td>Training speakers to present digitally</td>
<td>41%</td>
</tr>
<tr>
<td>Identifying and measuring the right metrics</td>
<td>36%</td>
</tr>
<tr>
<td>Integrating sponsors into online program</td>
<td>35%</td>
</tr>
<tr>
<td>Content structure &amp; organization</td>
<td>35%</td>
</tr>
<tr>
<td>Roles &amp; responsibilities between events, digital and content marketing teams</td>
<td>32%</td>
</tr>
<tr>
<td>Connecting online event platform with existing CRM and Martech solutions</td>
<td>30%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

**63% Of Companies Are Hosting Digital Events**

37% are not/or are not sure.

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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
- CMO / EVP Marketing: 10%
- SVP/VP Marketing: 14%
- Marketing Director: 21%
- Director, Events / Experiential / Activations: 17%
- Director, Sponsorships & Promotion: 3%
- Manager / Sr. Manager Events / Experiential: 14%
- Manager / Sr. Manager Marketing: 20%
- Manager / Sr. Manager Sponsorships: 1%

### Role in Events
- I determine the event strategy: 59%
- I determine what % of marketing budget is allocated to events, sponsorships, etc.: 39%
- I have significant influence on our events, sponsorships and promotional strategy: 74%
- I am responsible for executing our tradeshow participation & exhibits: 59%
- I am responsible managing our sponsorships and promotional activities: 54%
- I am part of the events, sponsorship & promotional team: 51%
- I provide marketing support for our events, sponsorships & promotional plans: 45%

### Primary Type of Business
- Business Services: 22%
- Communications/IT: 17%
- Medical/Healthcare: 9%
- Education: 8%
- Consumer Goods/Retail: 6%
- Industrial/Heavy Machinery & Finished...: 5%
- Building/Construction/Home and Repair: 5%
- Transportation: 4%
- Financial, Legal & Real Estate: 4%
- Sporting Goods, Travel & Amusement: 4%
- Government: 2%
- Raw Materials/Science: 2%
- Discretionary Consumer Services: 2%
- Food/Beverage: <1%
- Not applicable: 10%

### Annual Spend on Marketing Including Events, Sponsorships & Promotions
- Under $1M: 35%
- $1M to < $5M: 26%
- $5M to $10M: 5%
- $10M to $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