EXECUTIVE SUMMARY

CHARTING TOMORROW'S COURSE WITH TODAY'S INSIGHTS

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Introduction

The launch of this most recent wave, the fifth in our series, comes at a time of significant milestones. As the election, a vaccine update, the reintroduction of shutdowns and a record high number of cases coalesce, we start to see the impact of these events.

Heading into late fall/early winter, there is a renewed sense of caution and persisting concerns as cases rise. At the same time, we have a strong potential of a viable vaccine (or two). However, attendees realize a mass roll-out remains several months away. These milestones slightly temper the optimism we saw previously. Positive sentiment shifts down a few percentage points while safety concerns rise a few points. But the optimism that emerged in the previous wave hasn’t entirely disappeared. There’s no denying the winter has gotten worse as predicted, but, with solutions to this crisis in progress, we are seeing a greater likelihood to return to live events and an increase in confidence.

The return-to-events timeframe remains steady since the previous September wave. In both instances, we see that it’s taking about three full seasons from when we surveyed attendees before we see a 50% attendance rate. Based on the time shift, winter 2021-2022 is the expected timeframe for most (74%) to return to live events.

If we combine the slight decrease in positivity and the slight increase in confidence, our net results are neutral. Attendees recognize that restrictions may need to be “gradually relaxed” as a vaccine will still take time to fully penetrate our society. With so much still in fluctuation, attendees have learned to keep their guard up, their optimism in check and their realities in balance.

We are still months away, if not longer, from a state of relative stability.
While we examine the events industry as a whole, we also recognize that every vertical is different and has its own nuances. When and how a regional tech proprietary event returns will be different from a national trade association. Given the variances across verticals, we’ve created five additional industry-specific reports that dive deeper into technology, healthcare, manufacturing, retail, and business services. Since we also recognize data varies across event types, we’ve examined that aspect in addition to industries. We’ve made these reports available as an add-on to this larger report for those interested in focusing on a specific industry and event type.

Industry vertical reports can be purchased at research.freeman.com.
The next few slides provide a summary of the key insights from our most recent November Attendee Pulse Survey. Our second Freeman Research Report continues to build on the accumulation of insights generated by our pulse studies while also incorporating a deeper dive into our Online Event Pro® Platform (OEP) metrics. Together our sentiment and behavioral data allow us to continuously provide a comprehensive view of the future of the live events industry.
key insight #1

A STEADY STATE OF EMOTIONS

Overall negative sentiment increased from 50% to 55% and positive sentiment decreased from 29% to 26%.

Confidence index increased from 0.70 to 0.72.

Most influential factors:

- Factors related to safety concerns increase.
- 'Essentially no change in 'enough reliable information available to make attendance decision.'
key insight #2

TIME FRAME TO ATTEND IN-PERSON EVENTS STABILIZED FOR NOW

By fall 2021, 68% of attendees expect to attend in-person events. By winter 2021-2022, that number increases to 74%.

Likelihood of attending in-person increases from 70% to 74%.
key insight #3

SMALL WINS AND BIG OPPORTUNITIES FOR VIRTUAL EVENTS

44% of attendees cite ‘access to learning / content’ as the primary driver for attending virtual events.

Over 50% of attendees prefer to participate in exhibits and networking in-person only.

Most influential factors:

- 44% (compared to 37% in the last wave) value virtual to gain ‘access to learning/content.’
- An increase of 5% in virtual events meeting attendees’ goals.
what to expect in the core report

2020 caught our industry off guard in a big way. We shifted to virtual events and quickly learned that replicating the in-person to the virtual does not translate to success. Virtual events turned out to be much more complex to plan and execute and they are not going away in 2021. With that in mind, this second report in our series aims to provide insights into how we can truly plan and prepare for another year of uncertainty that follows from the aftermath of the pandemic.

IN THIS LATEST REPORT, WE EXPLORE AND EXPLAIN THE FOLLOWING:

- Attendee outlook for participating at in-person events for the next 18-24 months.
- Attendee mindset and attitudes toward safety and economic factors.
- What’s working and not working with virtual events for both attendees and exhibitors.
- Attendee plans for 2021 as it pertains to virtual, in-person and hybrid events.
- How to prepare for 2021 and beyond.

See our full library of reports here: research.freeman.com
want to explore and learn more?

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

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.

Have questions about the research? Contact our strategy and data teams at research@freeman.com.
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.
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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.