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September 2020

RETURNING TO LIVE EVENTS: WHAT ATTENDEES *REALLY* WANT

Presented by

BIZBASH

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ABOUT
ARJUN CHAKRAVARTI

Arjun Chakravarti, is GES' insights and analytics expert and a recognized expert in behavioral economics, design methods, and analytics. His expertise is leveraged to drive innovation and business model transformation across organizations and markets. Arjun serves on the board of the CEIR Research council and has been a keynote speaker at key industry events such as the Large Show Roundtable and CEIR Predict. Prior to joining GES, he was Managing Director of Level 100 Innovation, a Principal/Consulting Economist at Winsight-Technomic Inc., and an award-winning Business and Design School Professor. Based in Chicago, Arjun is a frequent keynote speaker at C-level corporate events and thought-leadership forums. He received his MBA and Ph.D from the University of Chicago Booth School of Business.

ABOUT
DAN HILBERT

Dan Hilbert, Executive Vice President of GES Events will be personally committed to ensuring the success of your GES relationship. Dan has 25 years of experience in the events, agency and entertainment industry. He has deep understanding of true experiential marketing and what it takes to make clients successful. Our corporate clients benefit from his strong leadership in everything from crafting the right attendee journey, developing strategy and delivering with flawless execution.

What We'll Cover Today

- Objectives
- Segmenting the Respondents
- What People Value from Live Events
- Value from Digital Experiences
- Recommendations for Experience Design

How do we design an event in a COVID-19 environment that successfully accounts for attendee value and concerns?

How Do We Design Events When COVID-19 is a Consideration?

1

Who are your Attendees?

How do their COVID-19 needs vary?

What do they value from events? (e.g., Buying, Networking, Learning?)

2

How do we solve for conflicts?

Do attendees with the same event needs share the same COVID-19 values?

IDENTIFY AND RESOLVE

3

How do we design universally?

Who is likely to attend?

Tailor communications to drive participation

Topline Key Findings: Survey of GES Client Attendees

Late June – Early July 2020 | 1,330 Respondents

1. **88% of respondents are open to attending live events in person**
   - 65% demand some form of mitigation in order to attend

2. **Most are concerned about flying but willing to drive to an event**
   - Consider regionalized and digital strategies

3. **Virtual is working for education seminars and potential seen in Virtual Halls**
   - Virtual Networking remains a challenge

*Data sourced from GES survey of 1330 attendees during the months of June and July to understand impacts and concerns related to safely returning to live events

OBJECTIVES

Risk & Mitigation Types

Topline Survey Averages Mask Key Design Insights

We find that respondents varied over three dimensions of COVID-19 Risk and Mitigation

1

Concern Over COVID-19

Send Kids to School
Spend Time with Small Groups of Friends
Take Public Transport
Stay at Hotel
Visit Places of Worship
Shop at Malls
Go to Work at Office
Dine Indoors

2

Confidence in Mitigation

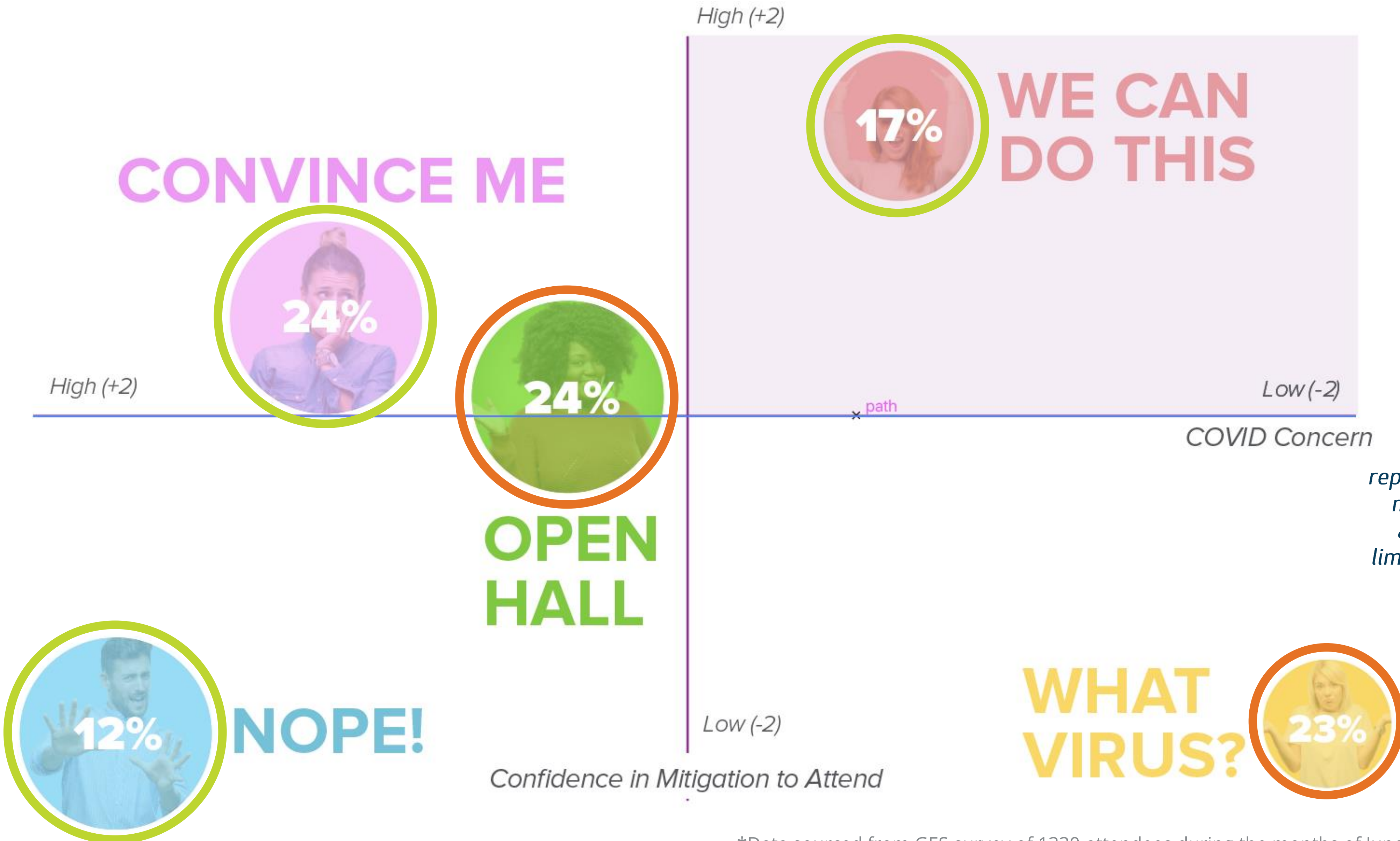
Temperature Checks
Mandatory Facemasks
Required use of Tech or Mobile Apps
Touch-free Practices
Explanations of Cleaning and Hygiene

3

Accommodates Show Changes

Visiting by Exhibitors by Appointment
Spacing and Crowd Management
Limiting Duration of Meeting Times
Staggering and Streamlining Attendance
Consent Form Absolving Show

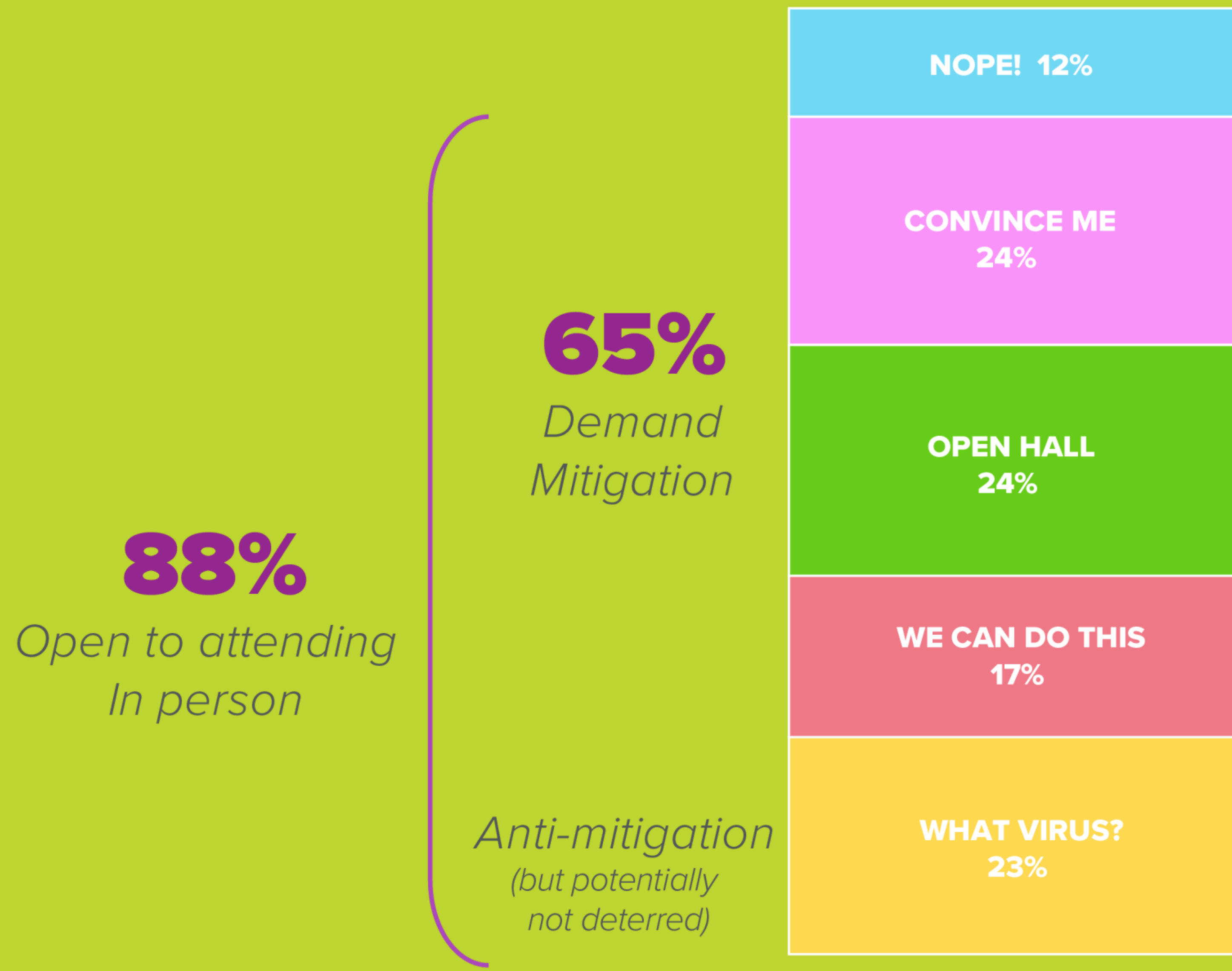
Five Distinct Groups Emerged Varying on **Concern** and **Openness to Mitigation**



Orange circles represent 47% who do not want required appointments or limited meeting times

*Data sourced from GES survey of 1330 attendees during the months of June and July to understand impacts and concerns related to safely returning to live events

Nearly 2/3 of attendees require safety precautions while almost a quarter are put off by these efforts due to low COVID-19 concern



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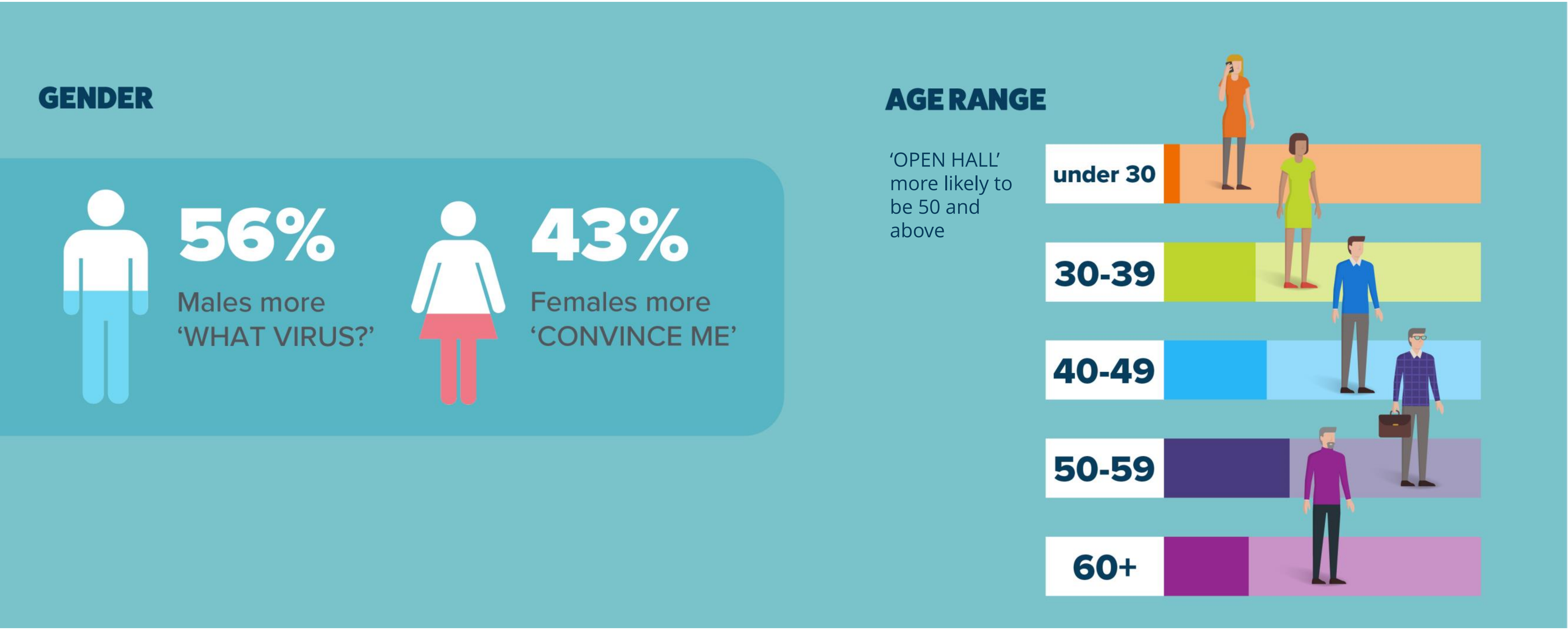
Who do these segments tend to be?

Personal Demographics

Strongly influenced by show participants: Male, Middle-aged, Southeastern + Midwest



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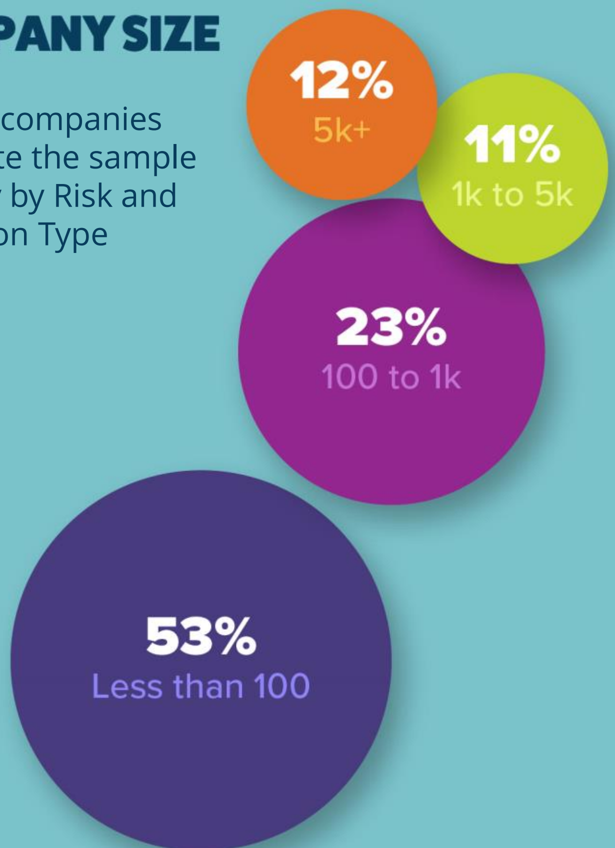
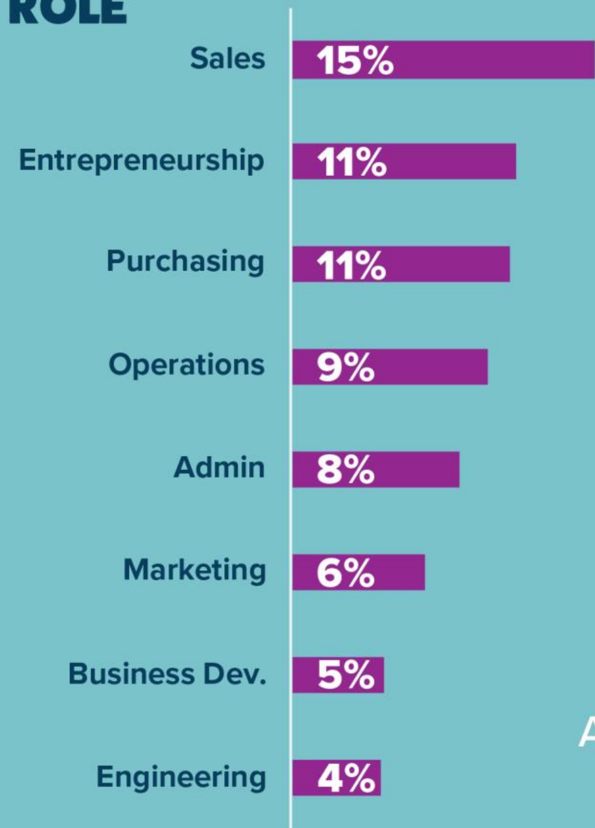
Professional Demographics

COMPANY SIZE

Smaller companies dominate the sample but vary by Risk and Mitigation Type

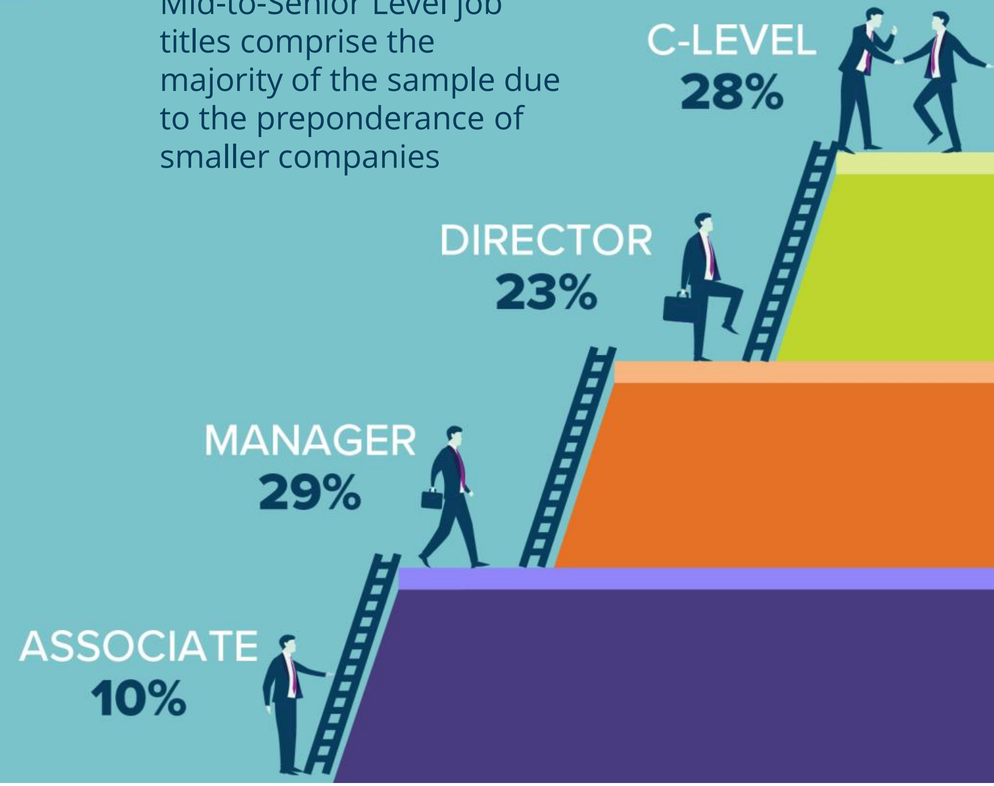


ROLE



JOB LEVEL

Mid-to-Senior Level job titles comprise the majority of the sample due to the preponderance of smaller companies



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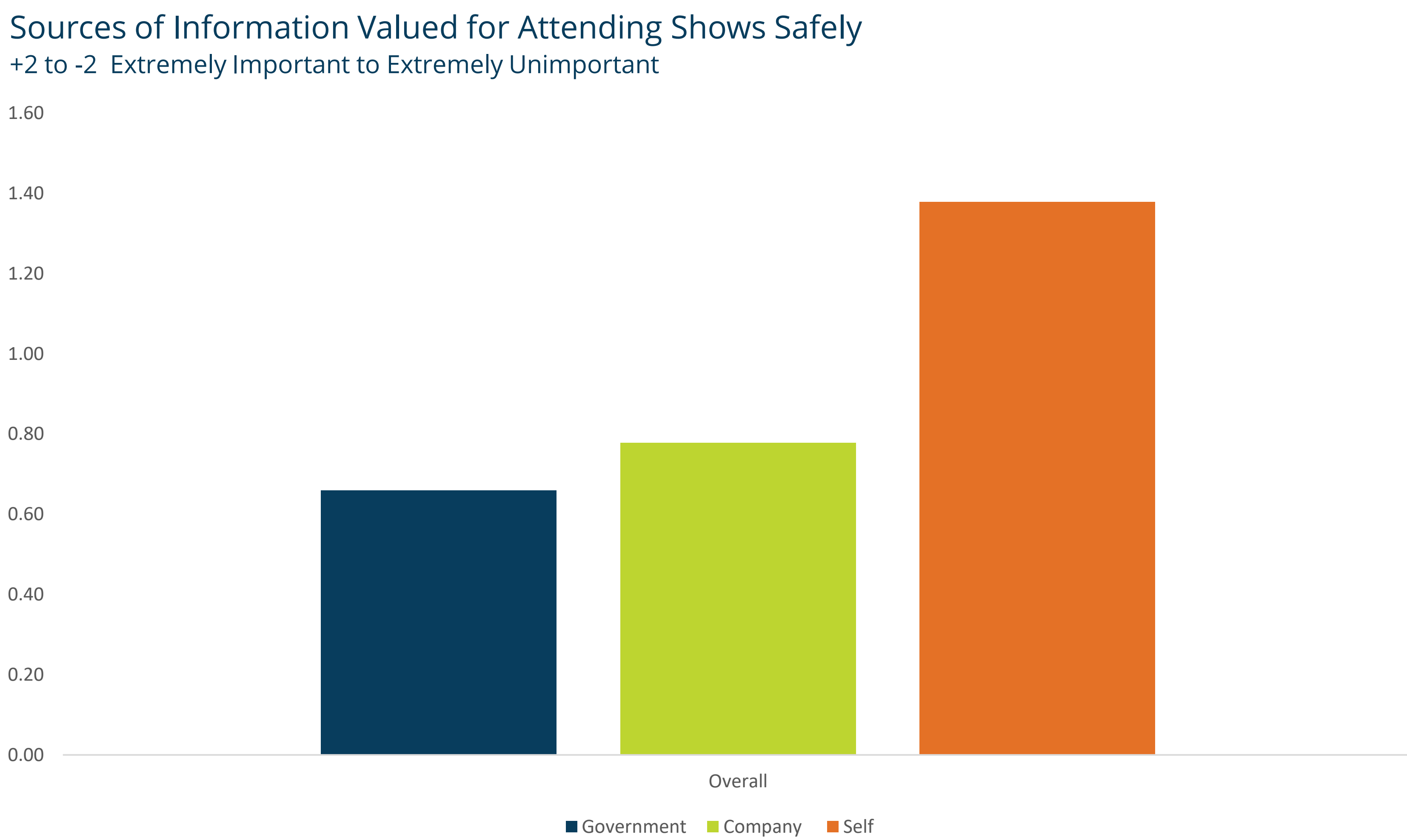
How open are they to attending?

Most Respondents Rely on Their Own Collection of Information, but the **More Risk Averse Groups Rely on all 3 Sources**



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High Overall Intent to Return to Shows, but Concern with Air Travel and Willingness to Drive to Events

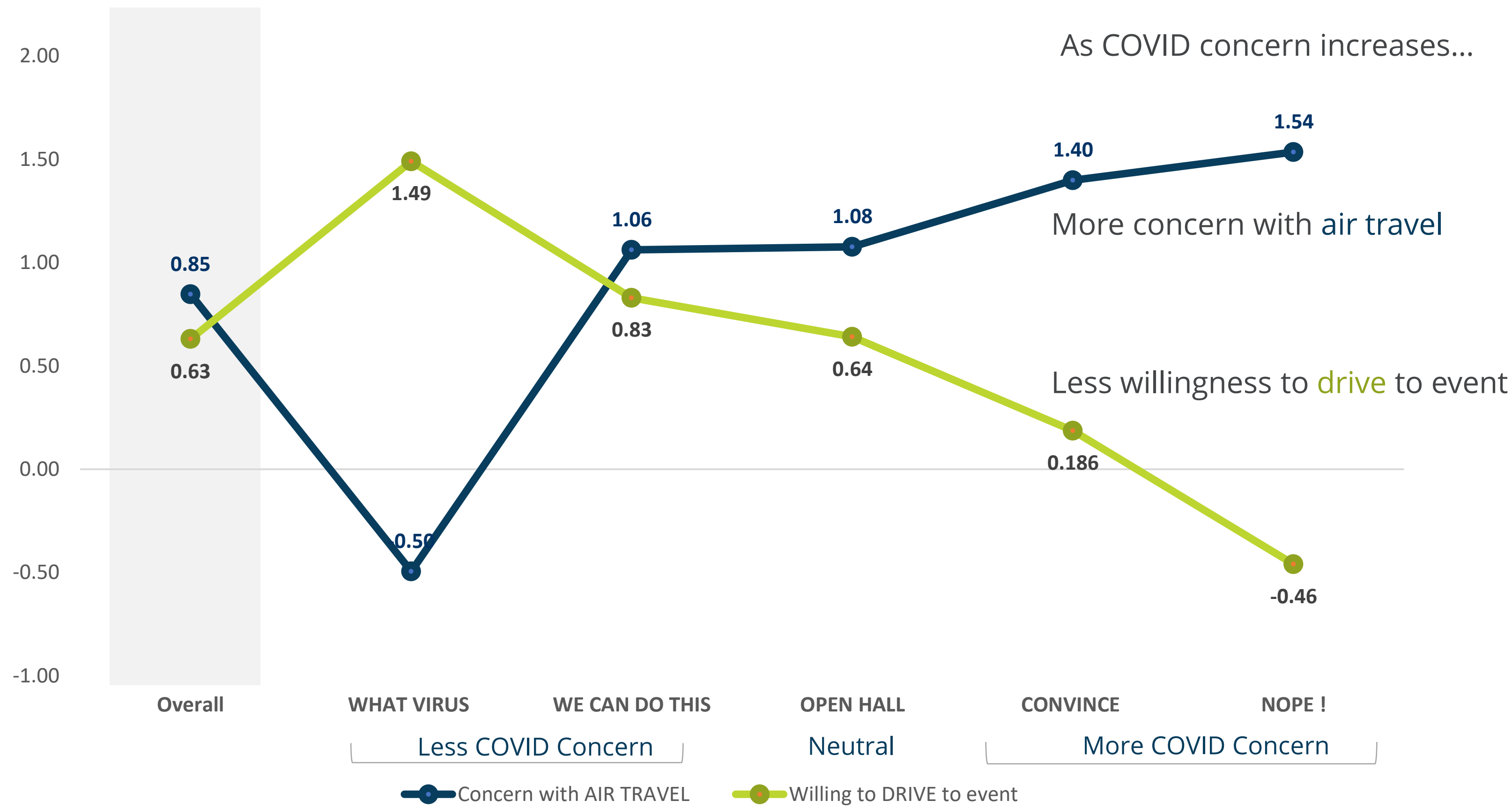
4.45

out of 5

INTENT TO RETURN

Concern with Travel by Air and Willingness to Attend a Show withing Driving Distance of Home

+2 to -2 Extreme to None



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How do respondents vary by sources of value at shows?

Attendee Types Vary in Sources of Value at Live Events

Activities Emphasized by Attendee Types

(2) Buyers very focused on Dealmaking and Hall

WHICH ACTIVITIES ARE A SOURCE OF VALUE TO YOU? (5 highest)

ATTENDEE TYPES		Networking with Peers	Share Work	Seminars	Cont. Ed	Exhibit Hall	Dealmaking	Tourism
Buyers	15%					4.30	4.09	
Enthusiasts	16%	4.46	4.08	4.30	3.89	4.56	4.04	3.91
Networkers	16%	4.41	3.24	4.12				
Social Buyers	19%	4.14				4.66	4.09	3.90
Hall Browsers	17%							
Education	14%	3.83		4.46	4.01			
Grand Total	1,330	3.86	2.80	3.42	2.22	4.16	2.90	2.91

36%

(1) Education very focused on Seminars and Cont. Ed

Blue boxes: positive departures from average

(3) Social Buyers emphasize Dealmaking, Hall, Networking And Tourism

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Risk and Mitigation Types Systematically Correspond to Attendee Value Types

Distribution of Value Types by Risk & Mitigation Types

ATTENDEE RISK & MITIGATION TYPES

ATTENDEE VALUE TYPES	WHAT VIRUS?	WE CAN DO THIS	OPEN HALL	CONVINCE ME	NOPE!
Buyers					15.1%
Social Buyers	31.3%		28.5%	18.4%	6.3%
Hall Only		8.1%	27.6%		20.8%
Enthusiasts		27.9%			5.0%
Networkers				28.5%	
Education		21.2%	18.5%	29.1%	
Average Risk & Mitigation group in sample	22.8%	17.2%	24.4%	23.9%	11.7%

Less COVID Concern — More COVID Concern

Some potential design conflict on scheduling and access

General consensus toward mitigation

Areas in Blue represent value type where the Risk & Mitigation type is overindexed. Red areas are where the mitigation type is underindexed. e.g., Nope! only comprises 11.7% of the total sample but 15.1% of the 'Buyer' groups

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Virtual Experiences

Virtual Somewhat Missing the Mark

Key findings:

- Education reigns
- Virtual Networking lags both in expectation and experience
- Virtual Exhibit Hall seen as mixed bag
- Enthusiasts like everything

Digital Ratings with Non-Participants Removed (617 Participants)

Scale: 3 to 1 Significant to Minimal Value, 0 for Non-participation

ATTENDEE TYPES		VIRTUAL PROGRAMMING				
		Seminar or educational session	Roundtable discussion	Virtual Exhibit Hall	Keynote Session	Virtual networking
Buyers	3.72			2.24 (+.06)		
Enthusiasts	4.00	2.50 (+.12)	2.21	2.05	2.23 (+.34)	2.16 (+.30)
Networkers	3.55			1.56		1.56 (-.15)
Social Buyers	3.23	2.00 (-.16)				
Hall Only	4.02			2.16 (-.16)	1.79	
Education	3.75	2.53 (-.27)				
Grand Total	3.72	2.30	1.98	1.91	2.04	1.75

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How do we design for these different groups?

Key Takeaway: Develop a tailored strategy and set of contingencies for your show that can coordinate attendee needs

1

Survey Your Registrants / Members

- Approach that captures RISK, MITIGATION and ATTENDEE VALUE SEGMENTS
- Link these segments to Titles, Job functions, and other identifying info that you can observe

2

Discover Event Specific Insights in Data

- Link observable characteristics to behavioral and risk segments
- Develop creative briefs for each type and design an ideal experience
- Identify potential conflicts between the personas
- Assign risk and value segments to full registration data

3

Finalize Event & Comms Strategy

- Tailor show plan for each type
- Design show schedule and activities to maximally accommodates different types
- Design and target specific communications for each type
- Execute attendee acquisition plan

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We Find Systematic Differences in Event Activities

Determine how many groups overlap in their needs and map against risk and mitigation types

Activities Emphasized by Attendee Types

Rating of Activity Value (0 to 5 Highest)

ATTENDEE SEGMENTS

		Networking with Peers	Share Work	Seminars	Cont. Ed	Exhibit Hall	Dealmaking	Tourism
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NETWORKING (65% of total)

Pro-mitigation except social buyers

EDUCATION (46% of total)

Generally pro-mitigation and somewhat pro-digital

SHOW FLOOR (67% of total)

- Social Buyers and Hall browsers preference for open floor, lack of scheduling, and unlimited meeting time which could create congestion problems.
- Possible non-compliance with mitigation rules could create attendee conflicts

TOURISM (35% of total)

Generally anti-mitigation – be mindful of overall control of off-site activities

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Create Tailored Attendee Experiences and Acquisition Plans

Maximize participation by identifying where individuals with similar show activities conflict in their mitigation needs

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High COVID and Mitigation groups
Low COVID and Mitigation groups

NETWORKING (65% of total)
Discovered that Social Buyers were all from a specific industry and could be separated from those who wanted mitigated networking.

EDUCATION (46% of total)
Overall pro-mitigation and low overlap in commercial activities allows for fully virtual offerings

SHOW FLOOR (67% of total)
- Conflict between users
- High and low-mitigation split between groups
- Schedule standard and high mitigation sessions
- Use tourism elements to split Social Buyers

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Apply Risk and Show Value Segments to Data to Aid Attendee Acquisition

Link Segments to CRM Databases

Attendee	Name	Identifying Info	Behavioral Segment	Risk Segment	Attendance Likelihood
1	A. Smith	Type A	Networkers	What Virus	High
2	B. Guo	Type B	Buyers	Nope	Low
3	C. James	Type A	Product Researchers	What Virus	High
4	D. Scott	Type C	All three	We Can Do This	Med
5	E. Cruz	Type A	Networkers	Convince Me	Low

Alternative Programming

Mitigation Communications

Mitigation Requirements

Special Show Programming

Map segments to individuals in attendee database

Note: if current registration data cannot yield accurate segment classifications, GES will recommend questions for IPPE to include as part of a registration process

Tailor communications to specific types*

* If CRM / database available

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Experience Design Principles

A high-level view for how to use this framework to conceptualize show design and address the majority of attendee needs

SEPARATE OUT EDUCATIONAL PROGRAMMING

- Pre-recorded and online seminar
- Capture non-attendees through Live-streaming and chat for 'Nope!'

HYBRID NETWORKING ON-SITE

- High mitigation One-on-one On-site follow-up with speakers, possibly sponsored networking walks for charity.
- Roundtables held possibly outdoors or well-ventilated indoor spaces with distancing, masks etc. to minimize risk.
- Live streaming and online-chat for 'Nope!' and other non-attendees

Questions?

Thank you for attending.

For more information, visit us at

ges.com