

WHITE PAPER # 2

EXHIBITOR INSIGHT REPORT

COVID-19'S IMPACT ON THE TRADE SHOW INDUSTRY



June 19, 2020

PRODUCED BY EXHIBITOR MEDIA GROUP

I. Introduction

The trade show and live-events industry remains in critical condition, following several months of inactivity due to COVID-19. Each week brings about another round of show cancellations, postponements, and announcements about going

virtual. As such, face-to-face marketing as we know it continues to exist in a purgatory-like state, leaving exhibit and event professionals wondering when we'll return to business as usual — if ever.

EXHIBITOR completed a two-part research initiative in May that surveyed both corporate exhibit managers and suppliers to the trade show and events industry. The more than 1,000 responses to our survey helped us peer inside the post-COVID crystal ball and formed the basis for our first white paper (www.ExhibitorOnline.com/Covid19) on how the pandemic has impacted the industry. As promised, we surveyed respondents again in June to identify any trendlines and determine how recent developments have affected exhibit managers' and trade show vendors/suppliers' experiences, opinions, and projections for the state of the industry.

This report provides the findings obtained through this second survey and specifically highlights how

the data has shifted in 30 days' time. We hope this report affords you exclusive insight about where the industry is at right now, as well as where it will likely go in the foreseeable future. EXHIBITOR will continue to conduct pulse surveys every four to six weeks to identify subsequent trends and update readers on how the data has been impacted by this rapidly evolving pandemic. ■



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II. Executive Summary

Both corporate exhibit managers and trade show vendors/suppliers have been significantly impacted by the cancellation and postponement of trade shows due to COVID-19. Below are 13 takeaways culled from the quantitative and qualitative data within the more than 200 pages of survey respondents' current plans and opinions.

- ▶ Most exhibiting companies (58 percent) anticipate returning to show floors by the end of October 2020, but another 29 percent have no plans to exhibit at any shows for the remainder of this year.
- ▶ While a majority of respondents have seen their exhibiting budgets cut, 85 percent expect those funds to return (at least partially) once trade shows resume.
- ▶ More than one-third of respondents say the cancellation/postponement of trade shows has made the value of exhibiting more obvious to upper management.
- ▶ To date, 52 percent of exhibit managers have implemented (or are in the process of implementing) virtual events, and 45 percent have participated (or are currently planning their participation) in a virtual trade show.
- ▶ Despite the fact corporate exhibit managers believe the added cost of PPE and additional safety measures required for post-COVID events should be paid by show organizers and event venues, more than eight in 10 expect that the exhibitors themselves will end up footing the bill.
- ▶ Exhibitors are optimistic about their 2021 trade show schedules, as they currently intend to participate in an average of 45 events next year.
- ▶ When asked what long-term industry impacts they expect to see as a result of COVID-19, corporate exhibit managers ranked more virtual/hybrid events, lower trade show attendance, fewer large/national events, and more small/regional events as the most likely outcomes.
- ▶ Trade show vendors' and suppliers' personal worries about COVID-19 have declined. When asked to rate their concerns on a 1-to-10 scale, respondents averaged 6.7 in June, compared to 7.4 in May.
- ▶ In the last 30 days, the percentage of vendor/supplier companies that have taken the following actions crossed the 50-percent threshold, meaning the majority have now cut budgets, reduced or eliminated bonuses and/or additional forms of compensation, froze hiring, furloughed staff, laid off staff, and provided personal protective equipment (PPE) or mandated social distancing in the office.
- ▶ Nearly one-third of vendor/supplier companies have furloughed more than half of their workforce and laid off at least one-fifth of their employees.
- ▶ Seven in 10 vendors/suppliers expect their monthly revenues to drop by at least 71 percent due to ongoing postponements/cancellations. And 78 percent predict their annual revenue will drop by at least 50 percent compared to 2019.
- ▶ Roughly one-third (35 percent) of vendors/suppliers are uncertain about their ability to survive this downturn, including 3 percent who believe they will probably or definitely go out of business.
- ▶ Only 7 percent of exhibit managers and 9 percent of vendors/suppliers expect the trade show and events industry will return to normal by the end of 2020. The majority anticipate that happening in the first or second quarter of 2021.

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Fig. 14: What long-term changes do you (corporate exhibit managers vs. trade show suppliers/vendors) anticipate the trade show industry will experience as a result of COVID-19?

ADDITIONAL DETAILS

For more information on the EXHIBITOR Insight Report: COVID-19's Impact on the Trade Show Industry, download our first white paper (dated May 15, 2020) at www.ExhibitorOnline.com/Topics/Insight/CovidImpact-WhitePaper.asp. You can also follow our COVID-19 coverage at www.ExhibitorOnline.com/Covid and view webinars on this research initiative at www.ExhibitorOnline.com/Insight.

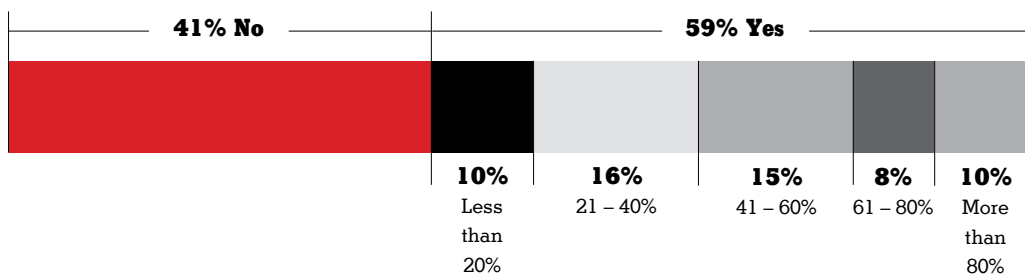
III. Corporate Exhibit Managers

To date, EXHIBITOR has recorded nearly 900 survey responses from corporate exhibit and event managers, marketing managers/directors, sales managers, and executives who are responsible for their organizations' trade show exhibit and event programs. The majority of our sample pool represents the manufacturing/distribution sector, with top industries including technology, manufacturing, and wholesale trade. The objective was to identify how recent COVID-19 developments have impacted their impressions and projections compared to benchmark data obtained in May, and to expand upon previous research into exhibit-marketing budgets and possible long-term implications of the pandemic. Where appropriate, some comparisons have been drawn to results from EXHIBITOR Magazine's 2020 Economic Outlook survey, which was fielded in January of this year.

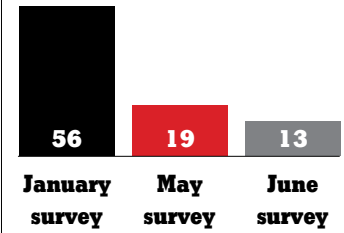
A. IMPACTS

As was evident in May, virtually all exhibit managers (97 percent) have had shows on their marketing calendars cancelled and/or postponed due to COVID-19. Respondents originally planned to exhibit at an average of 56 trade shows in 2020 (including regional, national, and international events). However, when asked how many shows they currently expect to exhibit at this year — given what they know right now — respondents anticipate that by the end of 2020, they will have participated in an average of just 13 events (including shows that occurred during the first quarter of 2020). That number is down 31 percent since last month, when respondents anticipated exhibiting at an average of 19 events. That decrease is likely due to a combination of factors, including the latest round of cancellations/postponements announced in the past 30 days, the prospect of a resurgence in coronavirus transmission, as well as the eroding trust marketers have in organizers' declarations that their events will still be held in the third or fourth quarters of 2020. It is probable that number will continue to fall as more trade shows rescheduled for late 2020 postpone until 2021 or decide to move forward as a virtual event.

FIGURE 1:
Have you experienced a reduction in your overall exhibiting budget and, if so, what percentage of your budget has been cut?



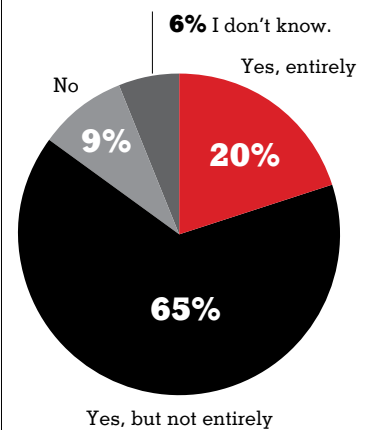
How many shows does your company plan to exhibit at in 2020?



“We had big plans for 2020, and it is all gone. There is zero talk of exhibiting this year, and I do not foresee that changing until a vaccine or viable treatment is found and available.”

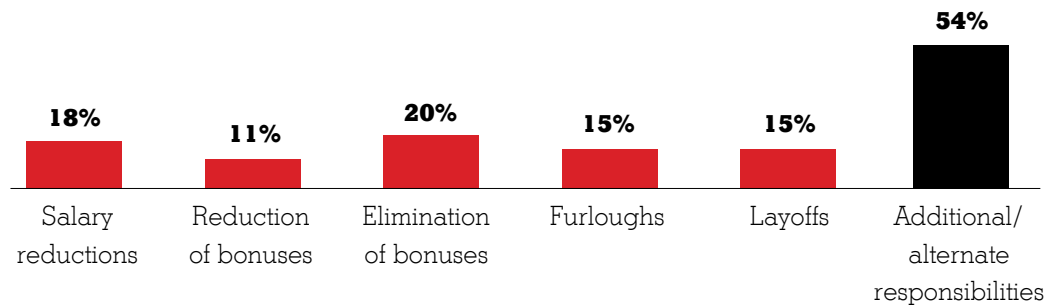
— Head of Product Marketing

When trade shows resume, do you anticipate your exhibiting budget will return?



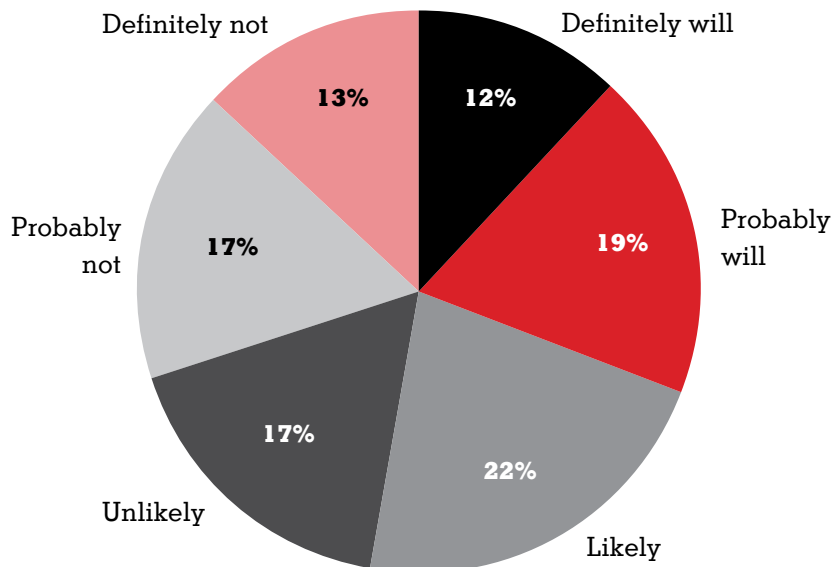
Not surprisingly, as the number of shows that companies plan to exhibit at dwindles, many organizations have cut their exhibiting budgets. In May, 45 percent of respondents reported budget cuts. Today, that figure has risen to 59 percent, and the majority of cuts have represented budget reductions of at least 40 percent. Thankfully, 85 percent of exhibit managers anticipate their budget allocations will rebound (at least in part) once trade shows and live events resume.

FIGURE 2:
How have you and your exhibit/event department been impacted by COVID-19?

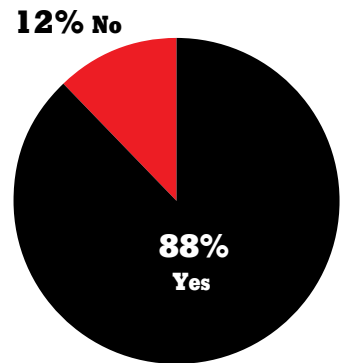


In addition to budget cuts, exhibit managers have experienced pay cuts, furloughs, layoffs, and the elimination or reduction of bonuses and additional compensation. Additionally, 88 percent of exhibit managers are still working from home, and the majority have been assigned additional responsibilities, increasing the scope of their roles despite a reduction in pay.

FIGURE 3:
How likely are you to exhibit at events that have been rescheduled for later in 2020?



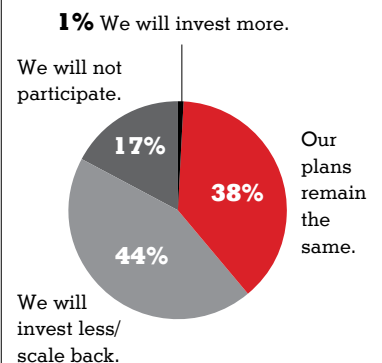
Is staff from your exhibit and/or event department still working from home?



“My company is anxious to get back to exhibiting, but we don’t want to spend money on an event and have half the attendees show up.”

— Trade Show Manager

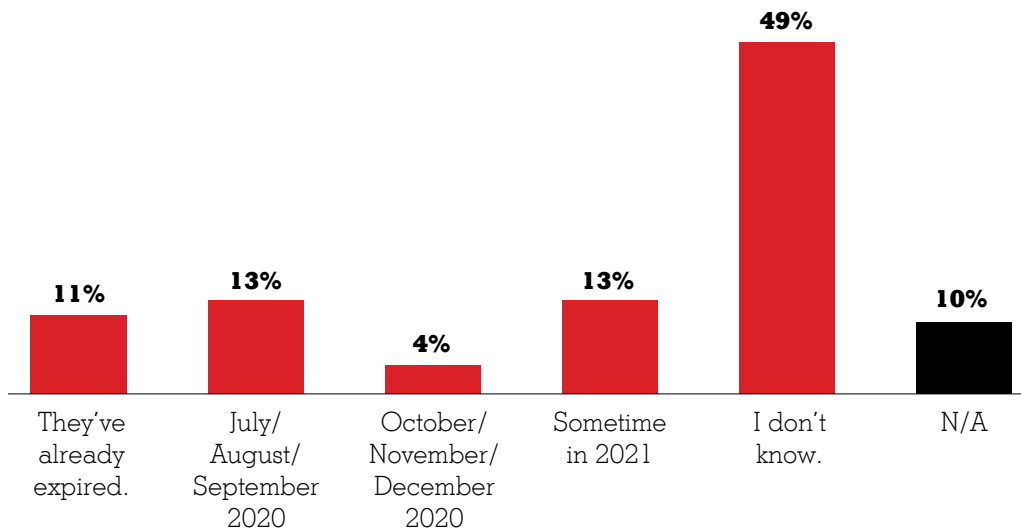
How will your presence at rescheduled shows compare to your pre-COVID plans?



In terms of events that have been rescheduled for later in 2020, it appears exhibiting companies are slightly more likely to participate than they were in May. When asked about their current plans for participation, 53 percent indicated they would likely, probably, or definitely participate in rescheduled events, compared to 46 percent last month. Having said that, the majority indicate that if they exhibit at rescheduled events, they will be scaling back their investments in those shows (compared to 39 percent in May).

That slight increase in corporate exhibit managers' likeliness to participate in third and fourth quarter 2020 shows may have to do with the fact that fewer of them are under companywide travel restrictions that preclude them from attending events. In May, 90 percent of respondents' organizations were imposing such travel restrictions, compared to 79 percent today. And while 17 percent of the remaining travel mandates are set to expire by the end of 2020, 49 percent still have no defined expiration date — and 13 percent extend all the way into 2021.

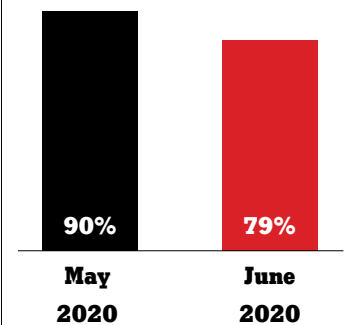
FIGURE 4:
When will your company's existing travel restrictions expire?



B. OPINIONS

Curiously, while COVID-19 continues to prevent live trade shows and events from resuming, it appears corporate exhibit managers' personal concerns about the coronavirus have subsided when compared to their feelings just last month. When asked to rate their personal level of concern on a scale of 1 to 10, they averaged 7.4 in May. Today, however, that average is down to 6.7. Similarly, exhibitors' outlooks on the future of their careers have seen a marginal improvement. While only 60 percent described feeling optimistic or hopeful about their careers in May, 66 percent report such feelings today. That number is still far below the 85 percent who felt hopeful or optimistic in January, but it indicates that at least some face-to-face marketers are feeling better about their long-term job security than they did 30 days ago.

What percentage of exhibiting companies are currently enforcing companywide travel restrictions that preclude individuals from traveling to trade shows and events?



"We are allowing some travel within driving distance, but all airline travel has been eliminated. Even those who want to travel by car need to have it approved as a business need."

— **Event Specialist**

Do you feel optimistic about the future of your career?

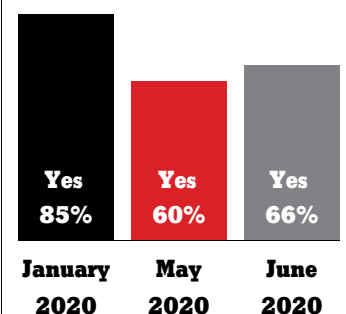
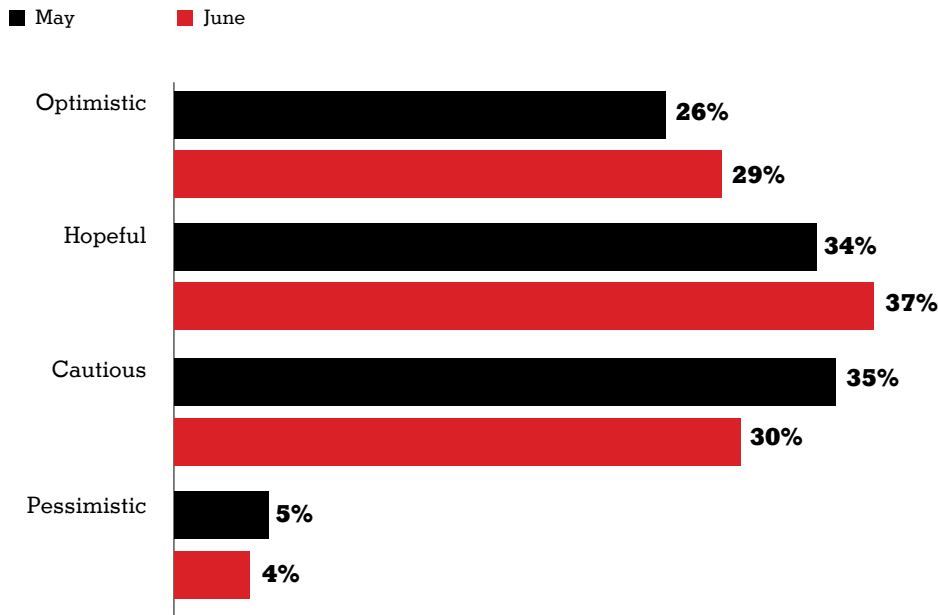


FIGURE 5:
How would you describe your feelings about the future of your career?

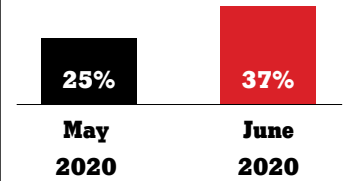


What's more, as projected, the cancellation and postponement of trade shows continues to have an absence-makes-the-heart-grow-fonder effect on upper management. Today, 37 percent of survey respondents indicate this downturn has made the value of face-to-face marketing more obvious to members of the C-suite. That's an increase of 12 percentage points in just the past 30 days. And trending would indicate that number will likely increase further as time goes on.

C. PLANS

Based on their current plans, most exhibiting companies (58 percent) expect to return to trade show floors by the end of October, but another 29 percent have no plans to exhibit at upcoming 2020 events. However, it's important to note that those plans are directly impacted by announcements from show organizers regarding the viability of third and fourth quarter events, as an increasing number are cancelled or postponed — in some cases for a second or third time. In other words, in May, the majority of companies anticipated returning to live trade shows by the end of September. Precisely 30 days later, that goal post has been moved from September to October. That trending would indicate that as time goes by and additional events are cancelled, postponed, or converted to virtual events, the goal post will continue to shift. On the other hand, while the pace of their return to exhibiting may have shifted in the last month, the long-term outlook appears unchanged. In May, data indicated that 95 percent of exhibiting companies would return to live trade shows and events by the end of 2021. Today, that number is nearly identical, with 94 percent of companies anticipating a return to live events by the end of next year.

What percentage of respondents indicate their C-suites have a greater understanding of face-to-face marketing's value as a result of the downturn caused by COVID-19?



"We are realizing that our live events are more than just marketing opportunities. Our reps get to meet people, learn new info in the field, and network with peers."

— Marketing Assistant

Has the cancellation and postponement of trade shows made the value of exhibiting more obvious to upper management?

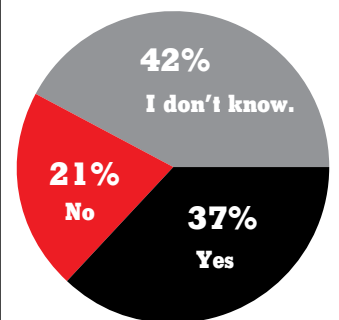
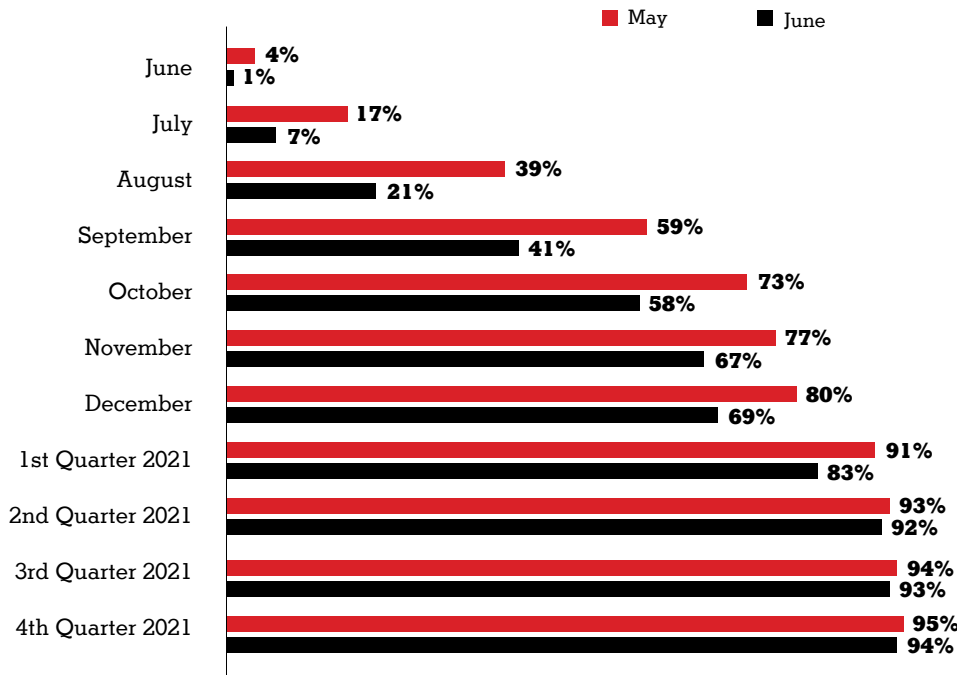


FIGURE 6:

Given your current plans, at what point will your company be back to exhibiting at live trade shows and events?



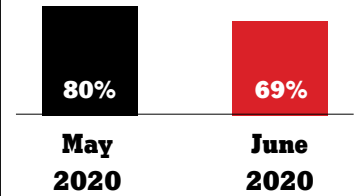
In the absence of live trade shows and events, corporate marketers continue to incorporate a variety of digital channels in an attempt to connect with customers, increase brand awareness, and obtain viable sales leads. Interestingly, while the percentage of companies who have considered or implemented virtual events has remained unchanged in the last 30 days, the percentage who have considered or participated in virtual trade shows (or plan to) has ticked up by 10 percentage points, from 73 percent in May to 83 percent today. Also noteworthy is the fact that virtually all respondents have either considered or have already implemented webinars and/or video meetings as part of their marketing efforts.

D. PROJECTIONS

Despite the majority of corporate exhibit managers’ tentative plans to return to trade shows by the end of October, only 7 percent expect the trade show and events industry will return to normal in 2020. Just as in last month’s survey, the majority (62 percent) continue to believe that rebound won’t occur until the first or second quarter of 2021. Moreover, an additional 11 percent don’t expect to see a return to normalcy until sometime in 2022, and 4 percent doubt the trade show and events industry will ever return to what was considered business as usual prior to the COVID-19 pandemic.

Looking ahead to 2021, most exhibiting companies expect to return to live trade shows and events, anticipating participation in an average of 45 events. While 20 percent down from the 56 events they initially intended to exhibit at in 2020, that number is a 250-percent increase in show participation when compared to current expectations of attending an average of just 13 events in all of 2020.

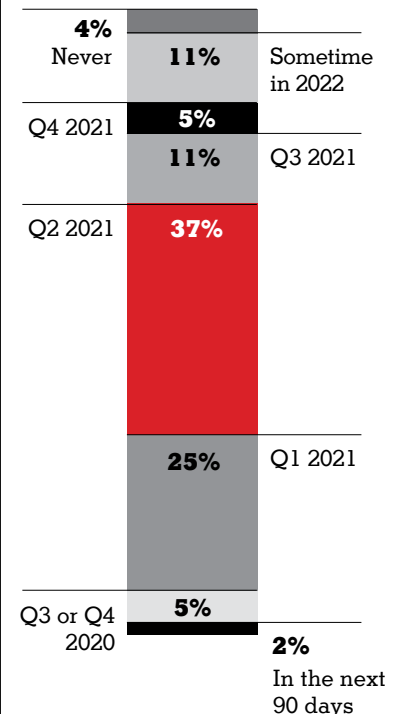
What percentage of exhibiting companies plan to return to live trade shows and events by the end of 2020?



“In the short term, I think fear and safety requirements will drastically reduce attendance.”

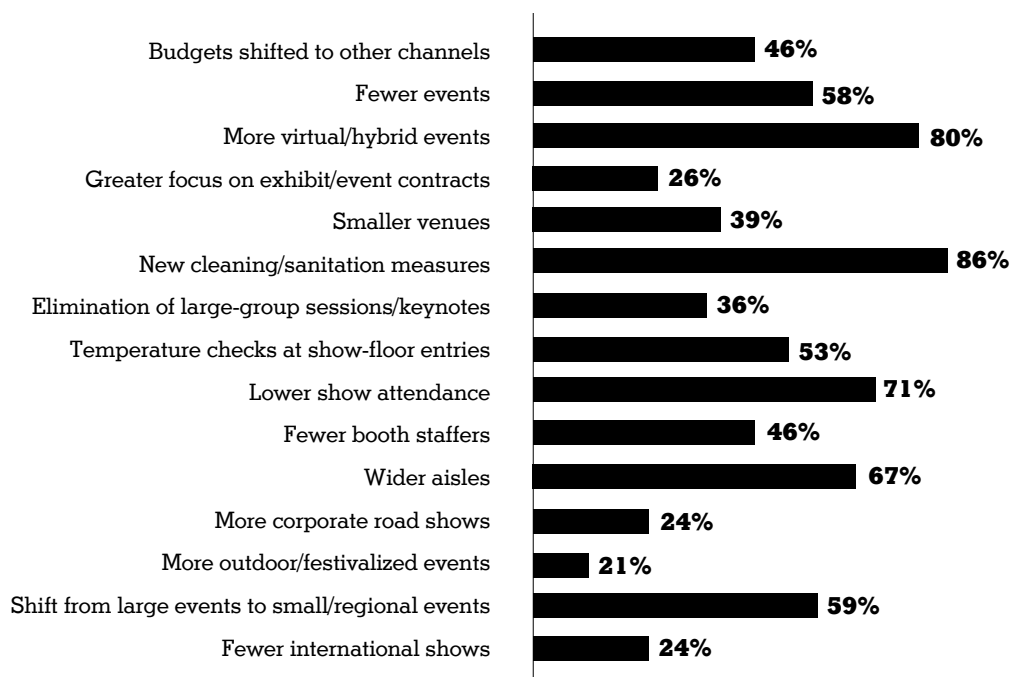
— **Communications Manager**

In your opinion, when will the trade show and events industry return to normal?



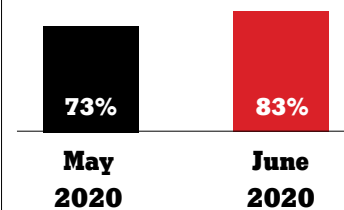
Assuming the overwhelming majority of corporate exhibit managers (96 percent) who believe the industry will rebound are correct, what will trade shows look like in a post-COVID world? When asked what long-term changes they anticipate as a result of the pandemic, the majority of exhibit managers expect to see new cleaning and sanitation measures (86 percent), more virtual/hybrid events (80 percent), lower trade show attendance (71 percent), wider aisles (67 percent), a shift from large national shows to smaller regional alternatives (59 percent), fewer events overall (58 percent), and temperature checks at entrances to exhibit halls (53 percent). Additionally, roughly four out of 10 expect to see fewer booth staffers (46 percent), portions of their exhibiting budgets reallocated to other marketing channels (46 percent), smaller venues selected by organizers (39 percent), and the elimination of large-group sessions, receptions, and keynotes (36 percent).

FIGURE 7:
What long-term changes do you anticipate the trade show industry will experience as a result of COVID-19?

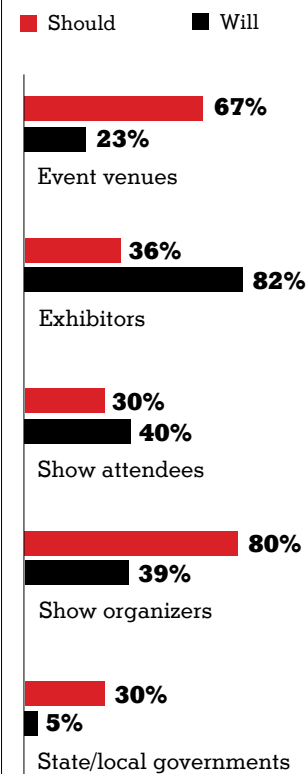


Finally, since most marketers anticipate the implementation of enhanced cleaning/sanitation of convention centers and event venues, as well as temperature checks and other safety protocols, there is an acute awareness those protocols come with increased costs. However, there is a distinct disconnect between who corporate exhibit managers believe should pay for those safety measures and who they believe will end up footing the bill. The majority think those costs should be shouldered by a combination of show organizers and event venues, but 82 percent predict it is exhibitors who will ultimately pay the price in some shape or form.

What percent of companies have considered or exhibited at virtual trade shows?



Which stakeholders do you believe should pay for additional safety measures at future trade shows and events? And who do you believe will end up paying?



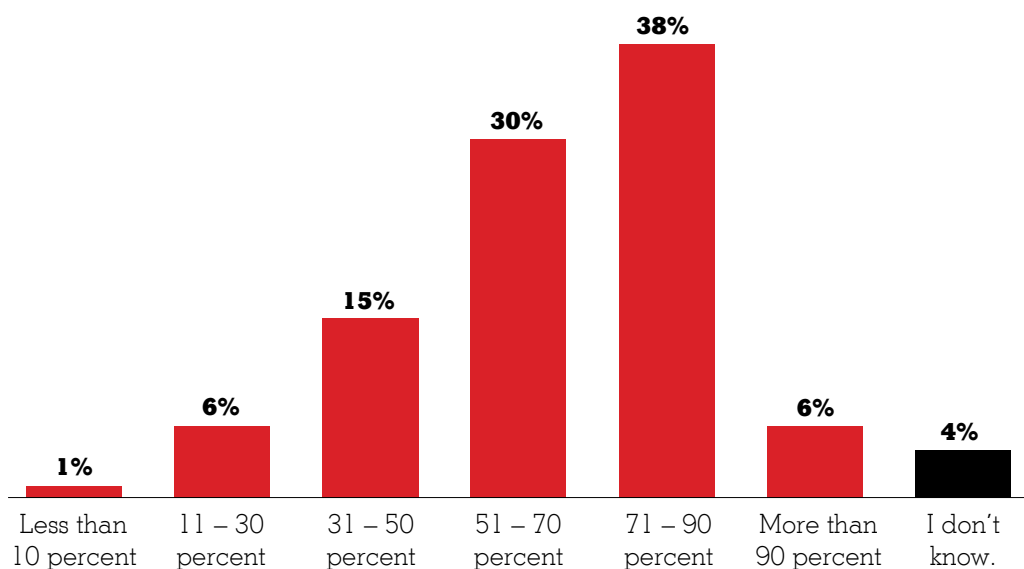
IV. Trade Show Vendors/Suppliers

To date, EXHIBITOR has recorded more than 600 survey responses from vendors and suppliers of trade show-related products and services to identify how COVID-19 has impacted their businesses, as well as when they expect to rebound from the pandemic. The majority of supplier respondents are managers/executives and work for exhibit producers, resellers, or builders. The size of respondents' operations varied considerably from one to four employees (20 percent) to more than 500 employees (6 percent). Similarly, annual sales-revenue numbers ranged from less than \$2.5 million (34 percent) to more than \$30 million (17 percent).

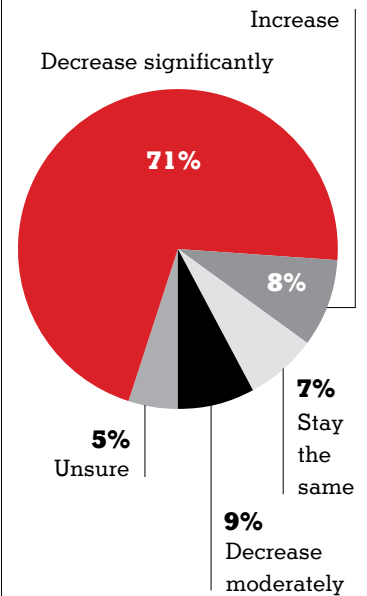
A. IMPACTS

As reported in May, the vast majority (83 percent) say COVID-19 has "very significantly" impacted their businesses, while an additional 12 percent report "significant" impacts. In other words, more than nine in 10 trade show- and event-related suppliers have experienced major impacts to their bottom lines. More specifically, 80 percent expect "moderate" to "significant" revenue shortages when comparing third quarter 2020 with third quarter 2019. While sobering, those numbers mark a 10-percent improvement over second quarter 2020 revenue predictions obtained last month, when 90 percent of vendors/suppliers expected similar declines when comparing year-over-year revenues. Unfortunately, in terms of monthly revenue, the gap between 2019 and 2020 has widened, with 61 percent of vendors/suppliers experiencing at least a 71-percent drop (compared to just 51 percent who reported similar shortfalls in May). And roughly three-fourths anticipate annual revenue declines of at least 50 percent compared to 2019.

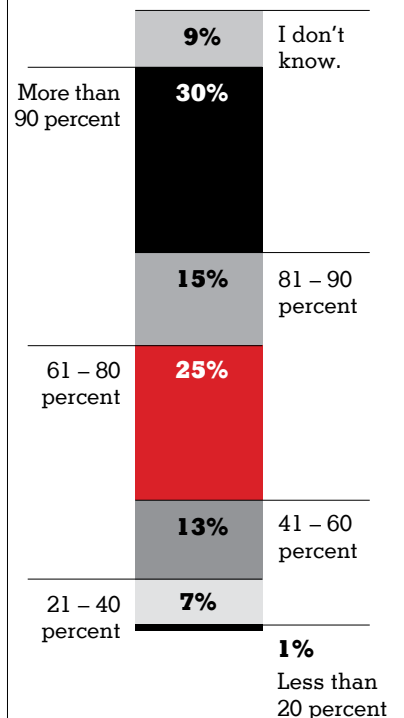
FIGURE 8:
What is your company projecting in terms of annual revenue decline due to COVID-19?



How do you expect your sales/revenue will change in the third quarter of 2020 as a result of COVID-19?

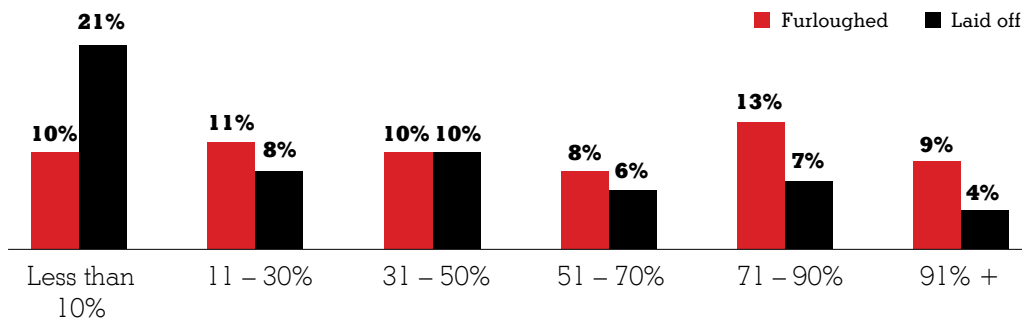


Estimate your company's monthly decrease in revenue as a result of COVID-19.



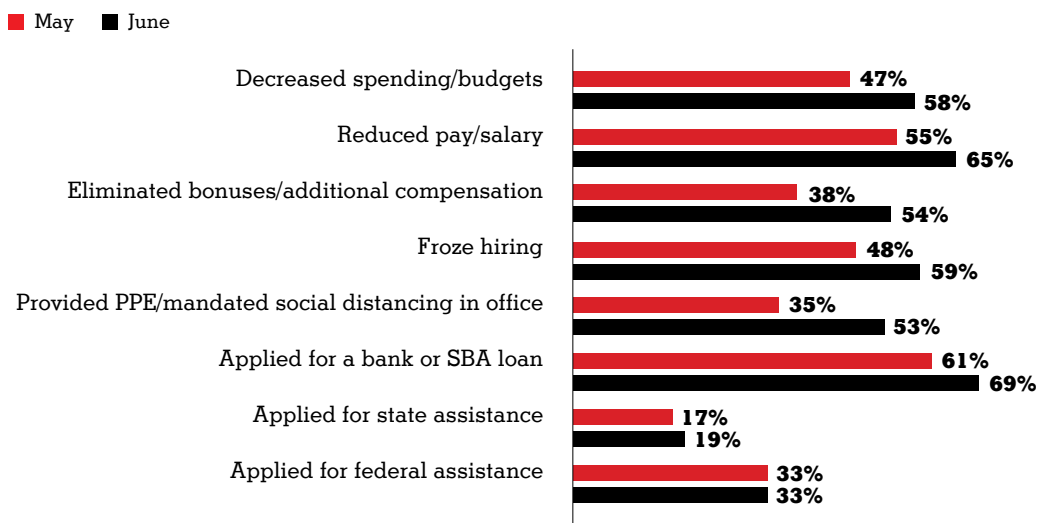
While the majority of trade show vendors/suppliers are still operating at a reduced capacity, 35 percent are open with normal hours of operation and 6 percent are currently closed. Those numbers indicate a roughly 5-percent shift in companies who have reopened following temporary closures that were still in effect 30 days ago. Additionally, 61 percent have furloughed staff (an increase of 15 percent since May) and 56 percent have laid off employees (an increase of 13 percent since May). The impact of furloughs varies considerably, with 10 percent of companies furloughing less than 10 percent of workers, while another 9 percent have furloughed more than 90 percent of their employees. Similarly, whereas 21 percent of companies have laid off less than 10 percent of their employees, 4 percent have already laid off more than 90 percent of their workforce (a number that has remained unchanged for the past 30 days).

FIGURE 9:
What percentage of your workforce has been furloughed or laid off to date?



Vendors/suppliers have also taken a number of actions as a result of COVID-19, including applying for bank or Small Business Association loans (69 percent), reducing employees' compensation (65 percent), enacting hiring freezes (59 percent), and cutting budgets (58 percent). The majority of vendor/supplier companies have also reduced or eliminated bonuses and provided PPE or mandated social-distancing measures in the office.

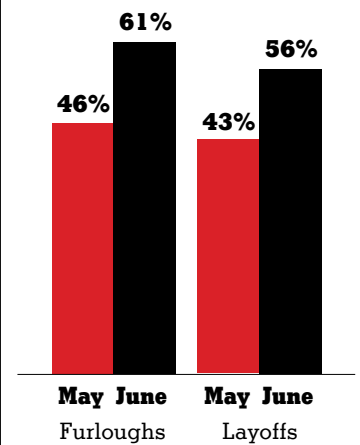
FIGURE 10:
What actions has your company taken as a result of COVID-19?



"We've undergone a 20-percent reduction in our workforce. Sales are way down. If things don't change, more cuts will have to happen."

— Owner and CEO

What percentage of trade show vendor/supplier companies have implemented furloughs or layoffs as a result of COVID-19?



"I feel like we've hit rock bottom and can only go up from here. But I've thought that every few weeks since this all began."

— Associate Director

When asked how long it would take their companies to return to business as usual if the COVID-19 pandemic ended today, the majority of vendors/suppliers (62 percent) predicted it would be at least three months before they would be wholly operational again — and 13 percent anticipated it would take more than 12 months to fully rebound.

B. OPINIONS

Despite the deep and dramatic impact COVID-19 has had on trade show vendors/suppliers, their worries about the pandemic have inexplicably softened over the past 30 days. When asked to rank their personal concern over COVID-19 last month, supplier respondents averaged 7.6 on a one-to-10 scale. Today, that average has fallen to just 6.6. While difficult to explain, the drop might be attributable to the number of aforementioned actions executives have taken in the past 30 days to keep their companies solvent for the foreseeable future. Having said that, there's still a fair amount of concern. When asked what actions they expect to occur in the coming month, 53 percent of vendors/suppliers reported anticipating additional furloughs, and 42 percent expect to see more employees laid off.

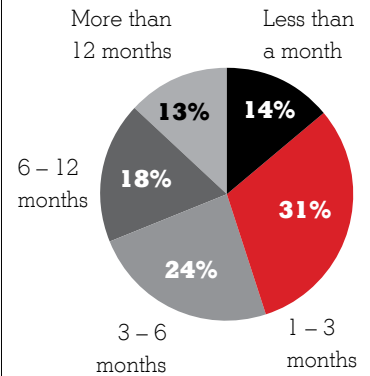
What's more, there's justifiable concern about whether the furloughs, layoffs, and budget cuts will be enough. Nearly two-thirds of vendor/supplier companies are currently unsure whether their companies will be capable of surviving the cancellation and postponement of trade shows caused by COVID-19 — and 3 percent believe it is probable they will go out of business.

C. PRACTICES

As previously reported, one-third of trade show vendors/suppliers have pivoted and retooled their operations to assist in the COVID-19 recovery effort, manufacturing everything from PPE to temporary structures used for testing and treatment. Others have reported building ventilators, working with companies that produce COVID-19 tests, and offering project management for the creation of pop-up hospitals. (For more information on how exhibit-related companies are assisting in efforts to end COVID-19, visit www.ExhibitorOnline.com/ShowofSupport.)

Additionally, a slight majority (52 percent) have been working with clients on plans for virtual alternatives to live trade shows and events. Others are doing what they can to assist current clients as they plan ahead for shows slated for later this year, as well as the first and second quarters of 2021. At the moment, 68 percent of vendor/supplier companies have clients who (to the best of their knowledge) are still planning to participate in trade shows scheduled for the remainder of 2020 — a figure that is almost dead on with corporate exhibit managers' actual plans (69 percent expect to be back on the trade show floor by the end of this year). However, it's worth noting that figure is down 14 percent from last month, when vendors/suppliers guesstimated that 82 percent of their clients would return to exhibiting by the end of December.

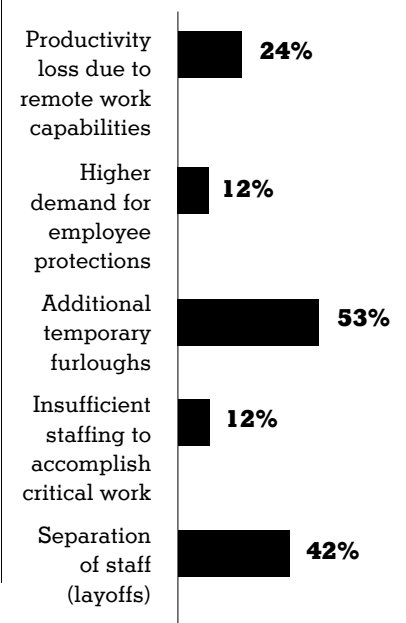
If COVID-19 ended today, how long would it take your company to get back to business as usual?



"Business as usual is an unattainable goal. We're just trying to stay afloat."

— Vice President

Which of the following does your company expect to occur in the next month?



D. PROJECTIONS

Sixteen percent of vendors/suppliers have clients that are still planning to exhibit at trade shows in June, July, or August, but the majority don't foresee their clients participating returning to live events until October at the very earliest. Similarly, when asked for their projections on when the trade show and events industry will return to "normal," just 9 percent selected dates in 2020, while 74 percent anticipate the industry will rebound sometime in 2021 (the majority of which pinpointed the first quarter of next year). Meanwhile, 14 percent don't expect any sense of normalcy until 2022, and 3 percent of vendors/suppliers don't foresee the industry ever returning to what was considered normal prior to the pandemic.

FIGURE 11:
Given what you know right now, when is the next show your client(s) plan to exhibit at?

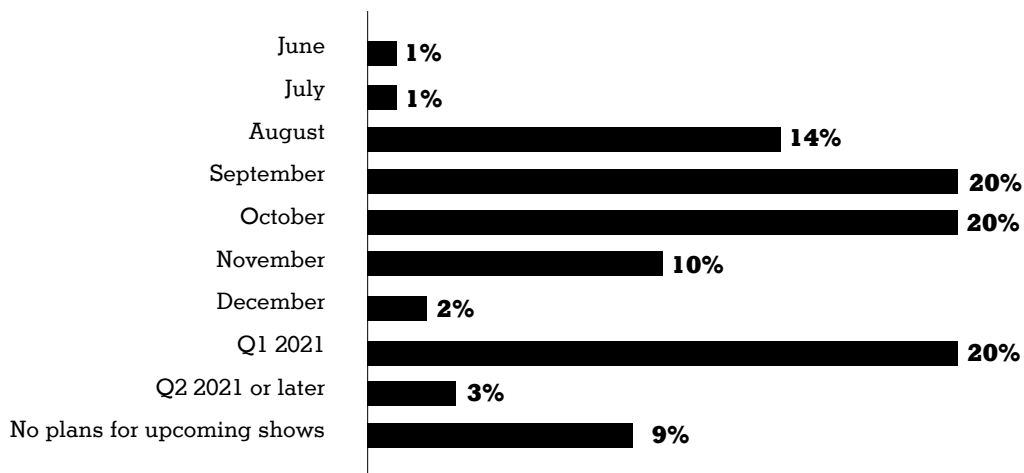
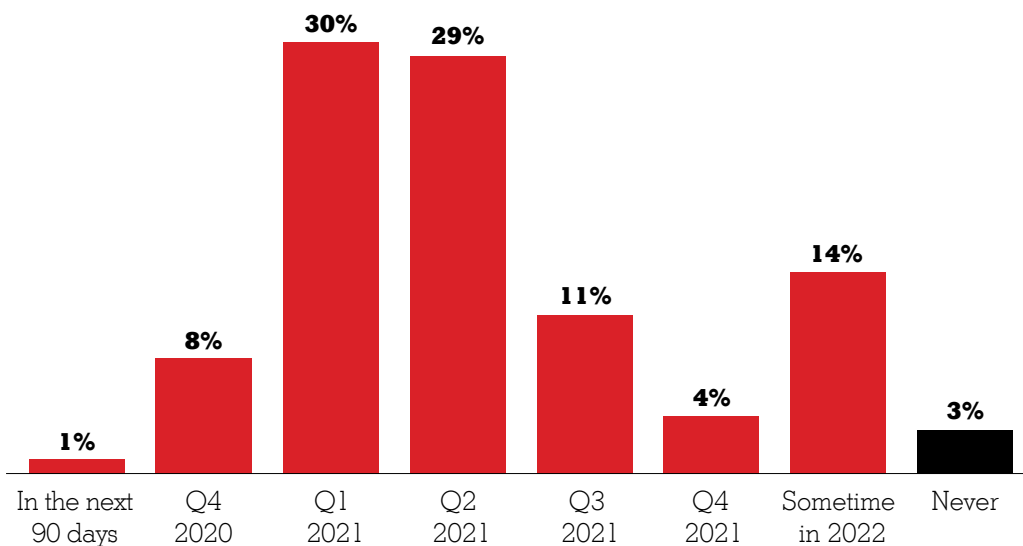


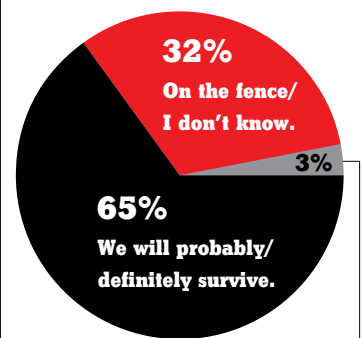
FIGURE 12:
When do you believe the trade show and events industry will return to normal?



"Our clients are looking to us for answers, but we have as many or more questions than they do."

— President

Given what you know right now, how likely is it that your company will survive the cancellation/postponement of shows caused by COVID-19?



We will probably/definitely go out of business.

"We've got great, creative people, and I know that we'll survive. But in order to do that, our survival plan is evolving almost weekly."

— Vice President, Business Development

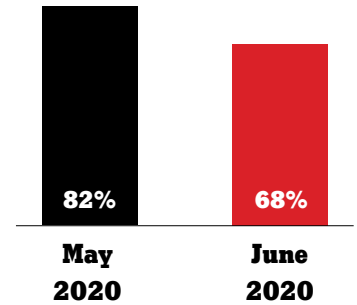
V. Conclusions

The data is clear: Our industry has been hit hard by COVID-19, and the effects are likely to last well into 2021. Having said that, it's not a question of if, but rather when, trade shows will return. And that optimism is rooted in reality, as seven out of 10 corporate exhibit managers still have plans to return to live events by the end of 2020. Furthermore, an increasing number of respondents indicate the absence of trade shows and other face-to-face marketing opportunities has helped to make the value of such channels more obvious to upper management, which hints at a bright — albeit potentially distant — future for the trade show industry.

Additionally, while many corporate exhibit managers are experiencing budget cuts, the majority expect to see the bulk of those budgets return once trade shows resume and uncertainty caused by the pandemic dissipates. What's more, 2021 projections show exhibiting companies returning to an average of 45 events, roughly 80 percent of their initial 2020 slate of trade shows. All of this points to a light at the end of what has proven to be a long and dark tunnel for trade show and event professionals

Still, the reality is that exhibitors (and trade show attendees) will decide when to return to the trade show floor, and that decision will dictate when we rebound. One significant bellwether to watch will be corporate travel restrictions. Since the vast majority of companies still have companywide travel restrictions in place (many of which currently have no defined expiration dates), no one can definitively predict exactly when the bulk of attendees and exhibitors might be allowed to travel for trade shows and events. But the data seems to indicate that we should see an uptick — albeit not a full rebound to business as usual — by the fourth quarter of 2020. Still, many will be exhibiting with scaled-back plans, so a full return to normalcy is unlikely until roughly the second quarter of 2021.

What percentage of your current clients have plans to exhibit at trade shows held between now and the end of 2020?



“For the time being, we plan to focus on smaller, targeted, local events where we get more time to engage with a highly concentrated demographic.”

— Trade Show Manager

Have you been working with clients on plans for virtual alternatives to live trade shows and events?

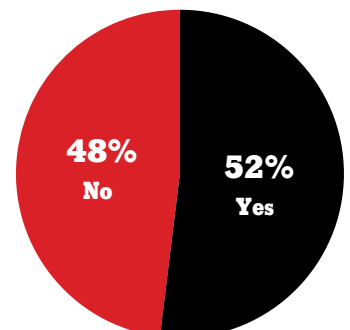
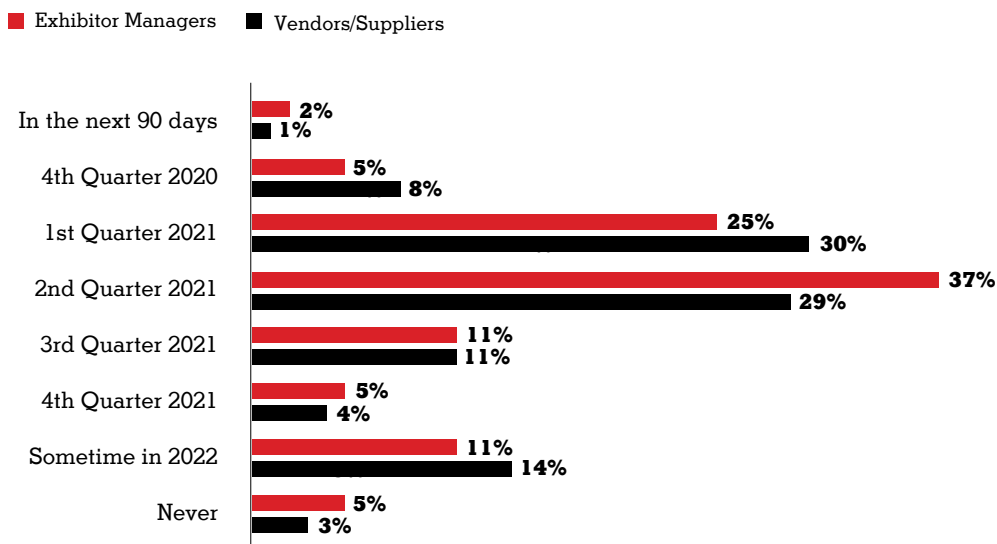


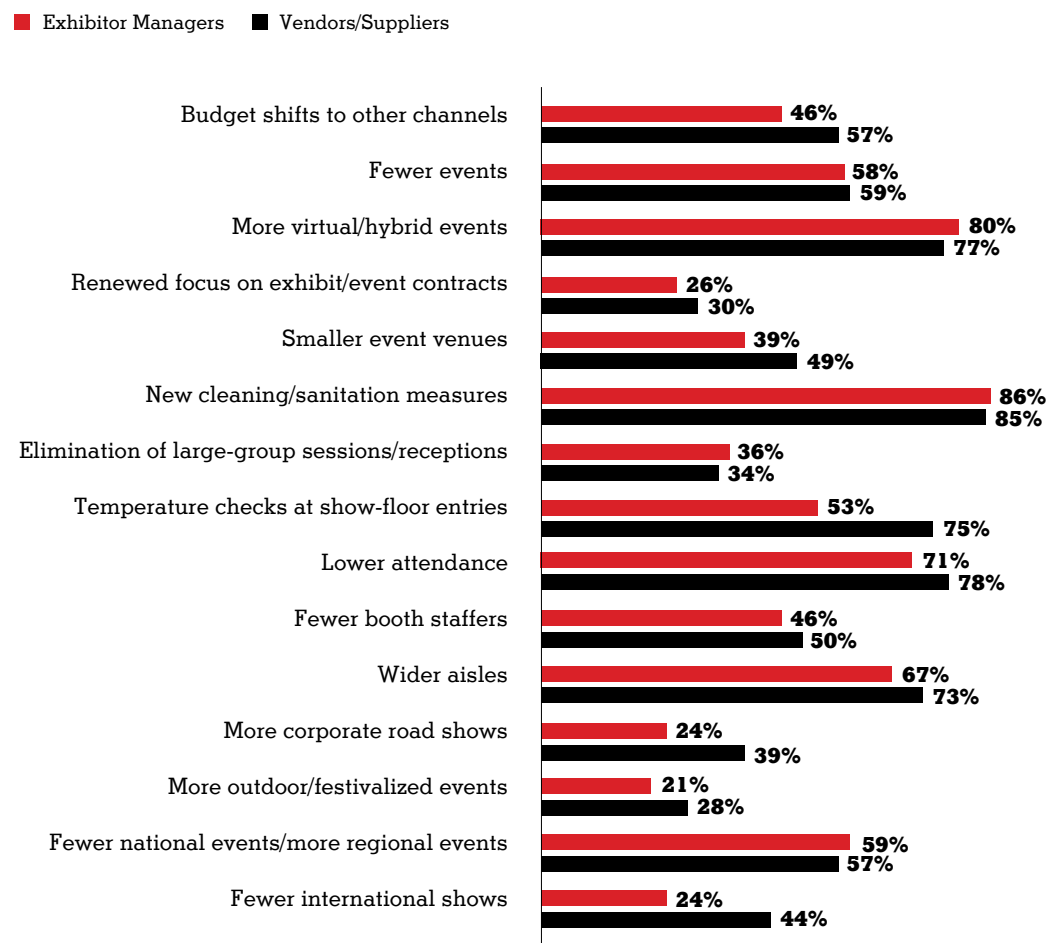
FIGURE 13:
When do you believe the trade show industry will return to normal?



Until then, we will likely see a reduction in both trade show attendance and the number of exhibiting companies at major national and international events, along with a likely uptick in their participation at regional/local trade shows. But it's essential to note that everything could change if a viable COVID-19 vaccine or treatment becomes available. At this very moment, the travel and hospitality industry — as well as convention center and venue managers — are establishing new guidelines and safety protocols, all of which will help exhibitors and showgoers feel safer participating in live events. And as shows in Asia continue to move forward (with domestic attendees only), they will help provide a road map for how the United States might transition back to whatever version of normal is ultimately deemed "the new normal." So while this report provides a glimpse into the future of our industry, only time will tell exactly how and when we'll get back to business — and back together.

For additional updates to this data based on subsequent pulse surveys conducted every four to six weeks, visit www.ExhibitorOnline.com/Research.

FIGURE 14:
What long-term changes do you anticipate the trade show industry will experience as a result of COVID-19?



ABOUT THIS SURVEY

The "EXHIBITOR Insight Report: COVID-19's Impact on the Trade Show Industry" is based on two surveys conducted by Exhibitor Media Group. An email survey was sent to both corporate exhibit managers and trade show vendors/suppliers on May 4, 2020, and the survey was closed on May 6, 2020, collecting 1,111 responses. A second survey was sent on June 9, 2020. That survey was closed on June 12, 2020, collecting 420 responses. To date, the number of analyzed responses is 1,479, including 853 corporate marketers and 620 industry vendors/suppliers. The majority of responses from corporate exhibit managers represent the manufacturing/distribution sector, with top industries including technology, manufacturing, and wholesale trade. Exhibiting company size varied, and annual revenue ranged from less than \$1 million to \$1 billion or more. Meanwhile, the majority of vendor/supplier responses were from managers/executives, and roughly six in 10 work for exhibit producers, resellers, or builders. The size of vendor/supplier operations varied, and annual sales-revenue numbers ranged from less than \$2.5 million to more than \$30 million.

