



# Welcome

INSIDE LIVE

MARCH 4, 2021

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FREEMAN



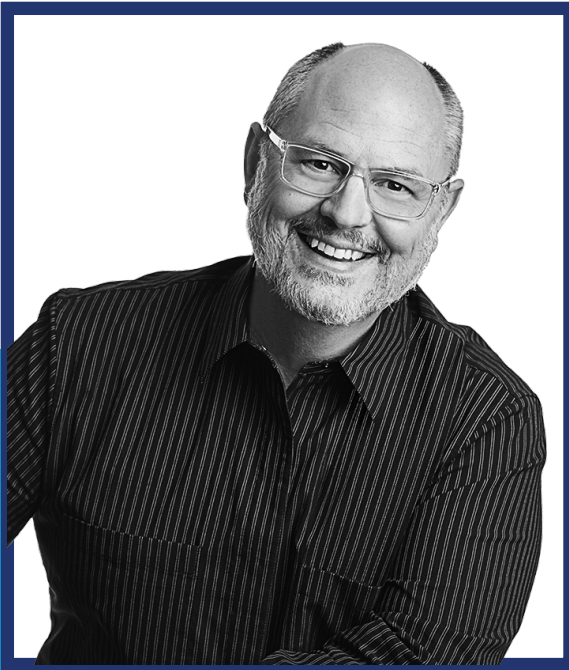


# Redefining Live



# Today's Speakers

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**Bob Priest-Heck**

CEO



**Janet Dell**

President & COO



**Ken Holsinger**

SVP, Strategy  
Digital & Data Solutions



A woman with dark hair in a bun, wearing large hoop earrings and a pink hoodie, is shown in profile looking upwards. She has white headphones around her neck. The background is a bokeh of colorful lights in shades of red, orange, and blue.

**In chaos,  
there is hope.**



# There are 4 major catalysts that drive consumer behavioral change



## Social Life

- Marriage
- Children
- Deaths
- Socio-political unrest



## Technology

- The internet
- Social media
- Mobility
- Streaming services



## Ad-hoc Events

- Wildfires
- Hurricanes
- Earthquakes
- Pandemics

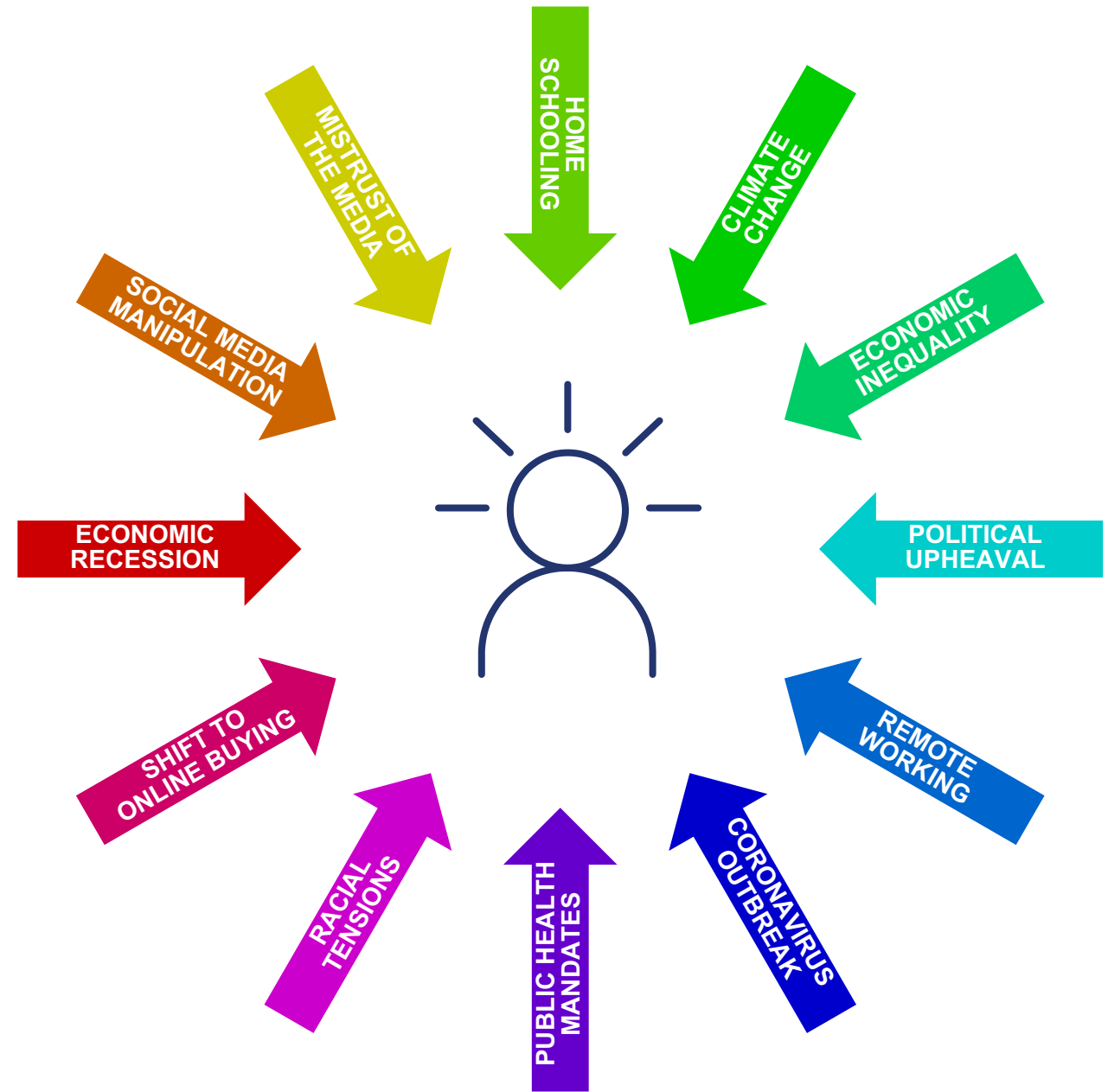


## Regulations

- GDPR
- Data privacy
- Clean energy
- Public health mandates



**2020's mix of  
change catalysts  
has caused  
some of the most  
impactful shifts in  
living memory**





# The acceleration of digital adoption in 2020 has been staggering and unprecedented

## Remote Learning

**1.2 billion children**

moved to hybrid learning in a matter of weeks

## Telemedicine

**10x in 15 days**

10x growth from pre-COVID participation in telemedicine in 15 days

## Online Delivery

**20x in 90 days**

10 years of pre-COVID growth in online delivery was achieved in 8 weeks

## Online Entertainment

**7 years in 5 months**

In 5 months, Disney+ amassed a user-base equivalent to 7 years of Netflix growth

## Remote Working

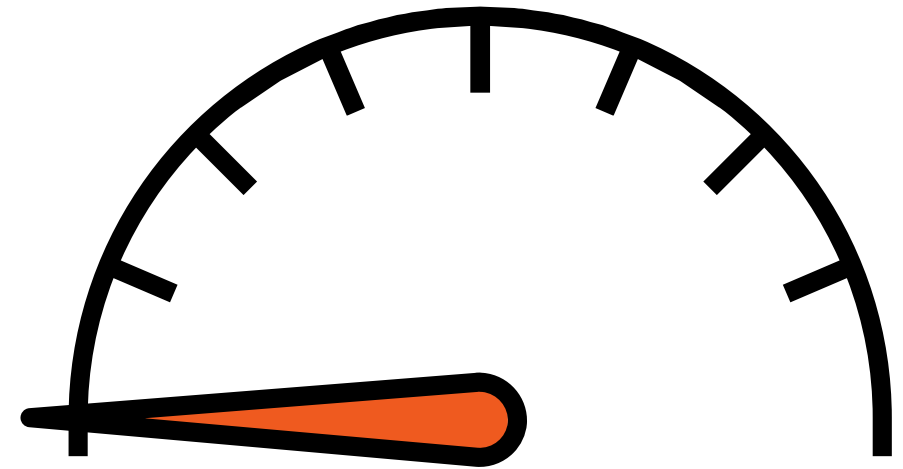
**20x in 90 days**

20x growth from pre-COVID participation in remote working in 90 days



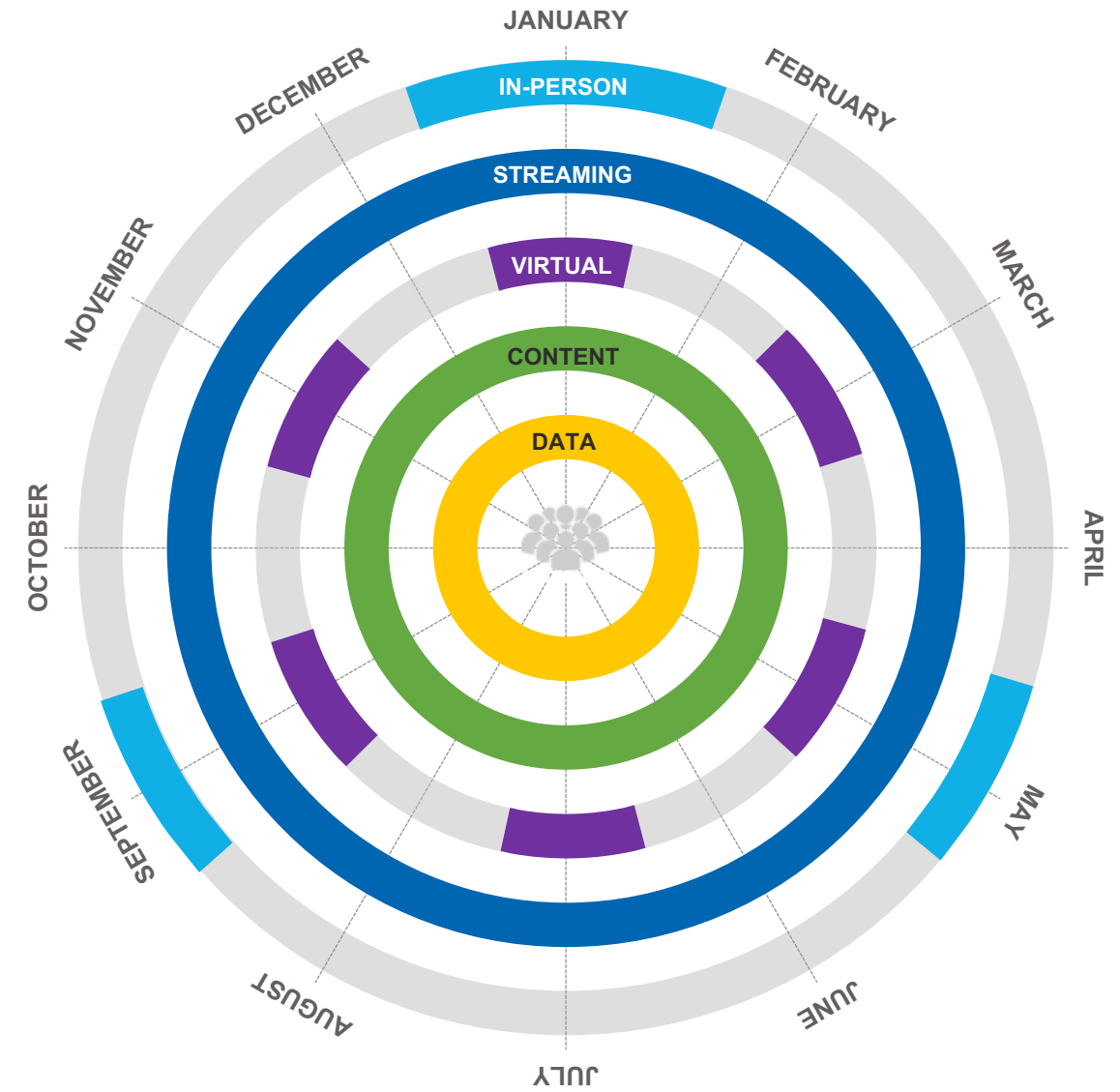
# 75%

**of companies in  
the US plan on  
accelerating their  
technology  
transformation  
as a result of the  
pandemic**





**Just like the rest  
of the world, the  
business of LIVE  
will need to change**



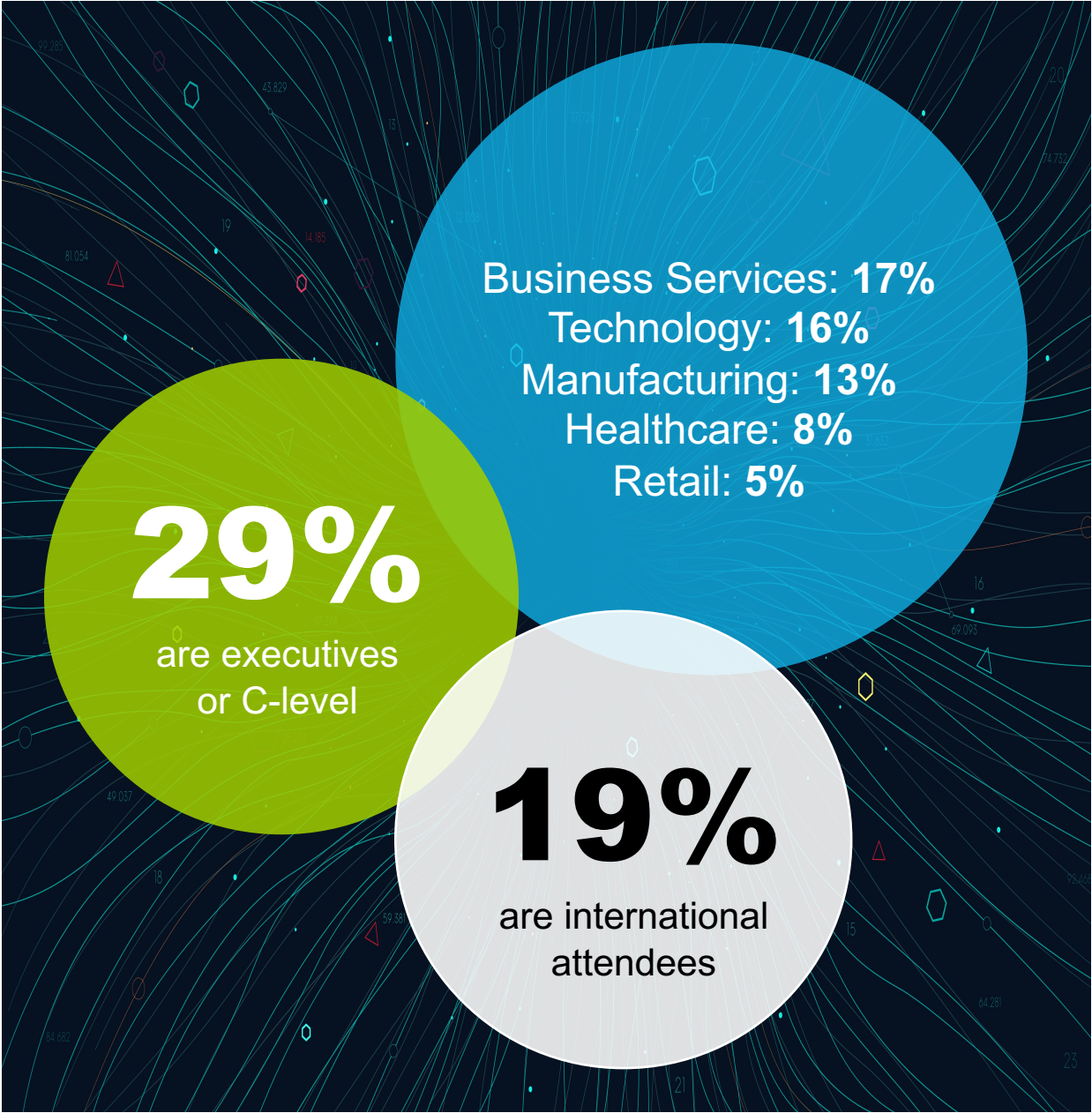


# Profile Snapshot

WAVE 8

survey closed 02.20.21

FEBRUARY	
ATTENDEE MARGIN OF ERROR	±1.2%
EXHIBITOR MARGIN OF ERROR	±2.7%





# Vaccine / Timeframe Narrative

1.

**Summary:** Trade show attendees, suppliers and exhibitors are far more willing to immediately receive vaccines than the average person in the US

2.

**Basis:** We looked at secondary research from McKinsey, CDC, Axiom and others. We saw the potential based on demographic segments for a higher receptiveness on vaccines than the average population

3.

**Result:** We Surveyed our attendees and exhibitors and came back with a +80% willingness to take vaccine ASAP and a +20% bump in overall confidence in the 2021 Fall times frame for return to events

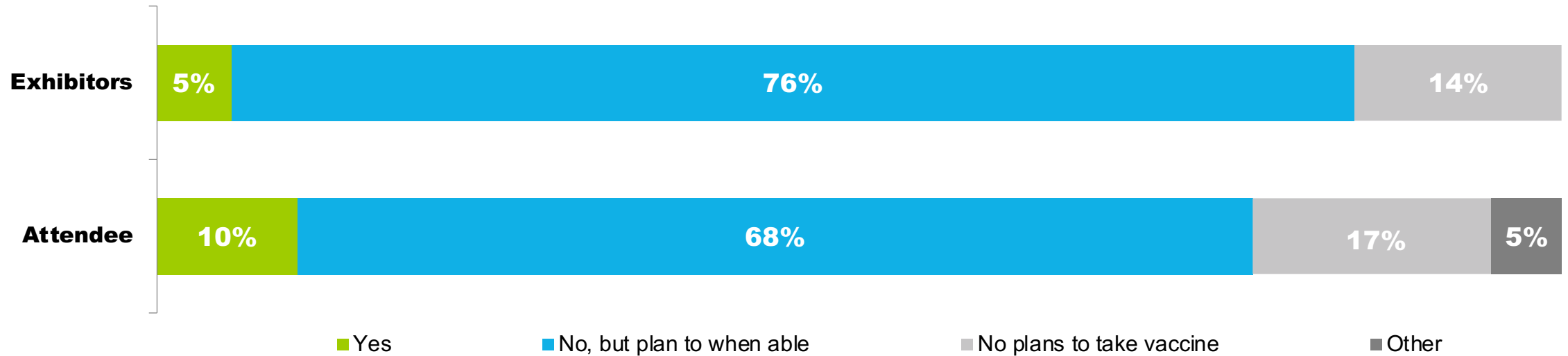
4.

**Why?** The average age (48), Income (+ \$125k), and education (+ 5 years post high school) of event attendees, are major factors driving vaccine mindsets and timeframes



# Most plan to get vaccinated when able (or already have)

## HAVE YOU BEEN VACCINATED FOR COVID-19?



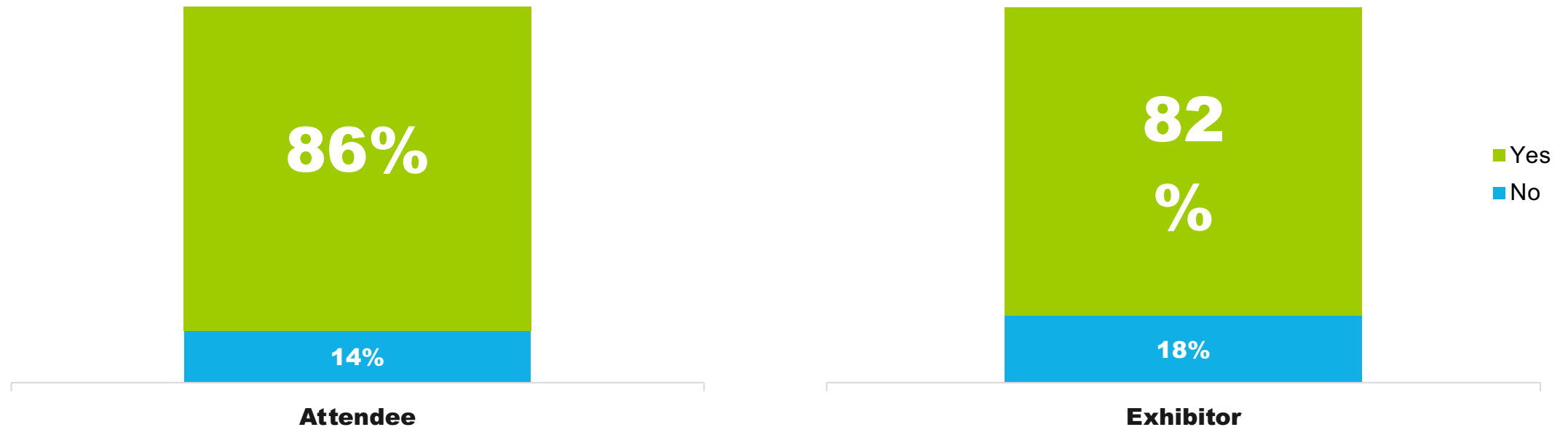
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# Vaccination will substantially boost confidence in attending in-person

## WILL VACCINATION INCREASE CONFIDENCE ATTENDING IN-PERSON EVENTS?

*Base: Those who have been vaccinated or plan to be*



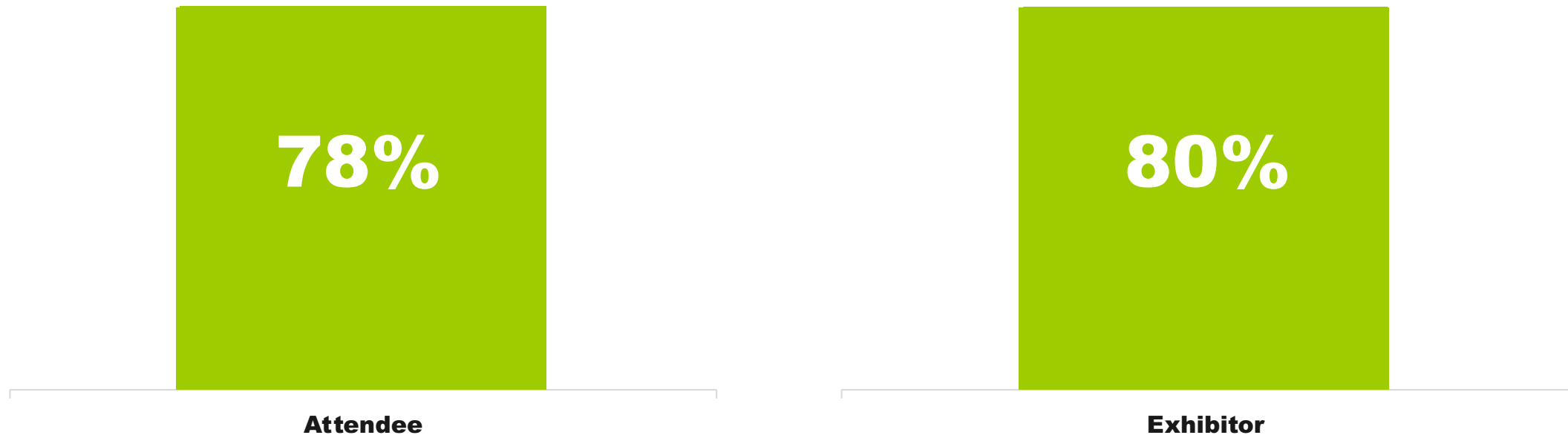
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**Q** Once you are vaccinated, will you be more confident in attending in-person events?

# If vaccinated, most will attend in the fall.

## TIMEFRAME FOR ATTENDING AS A RESULT OF THE VACCINATION

*Base: Those who feel more confident because of the vaccine*



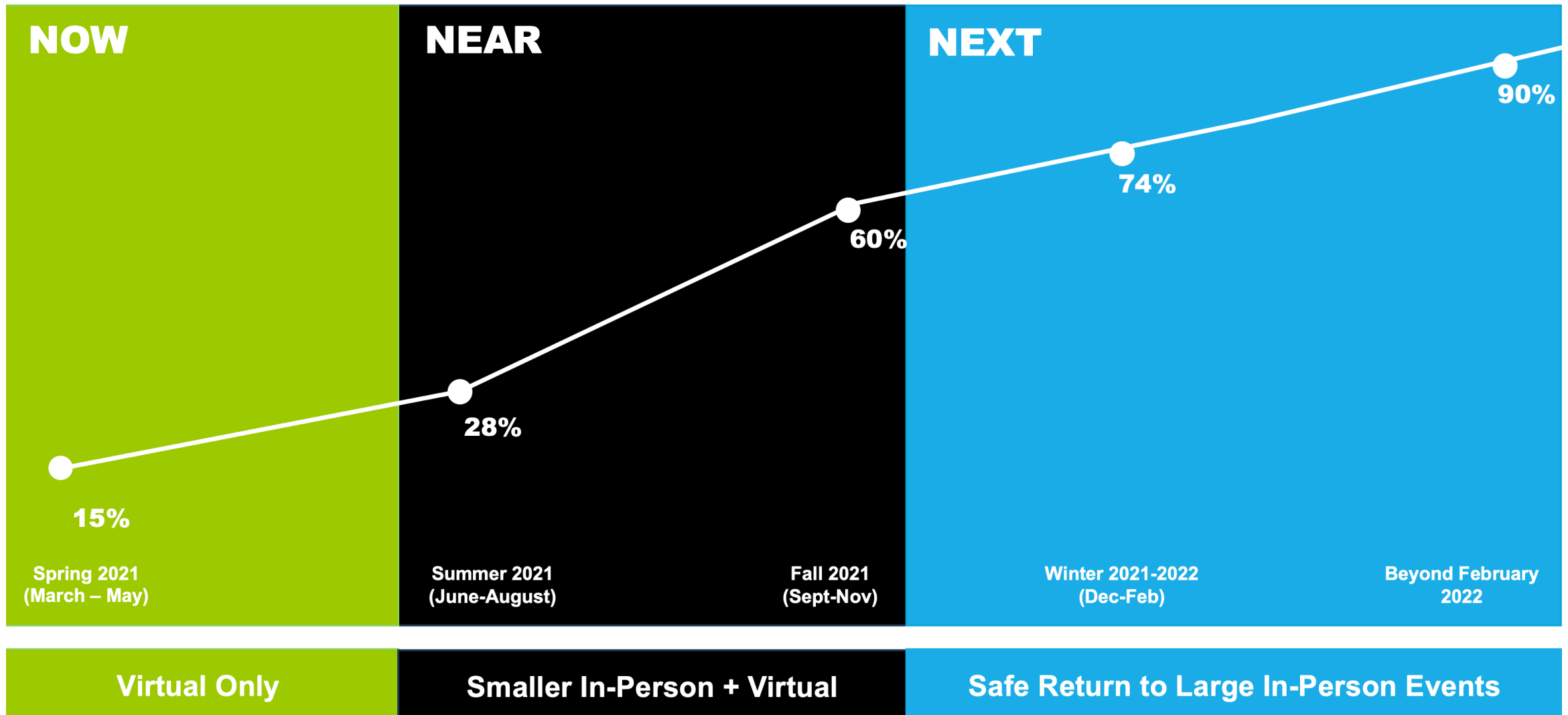
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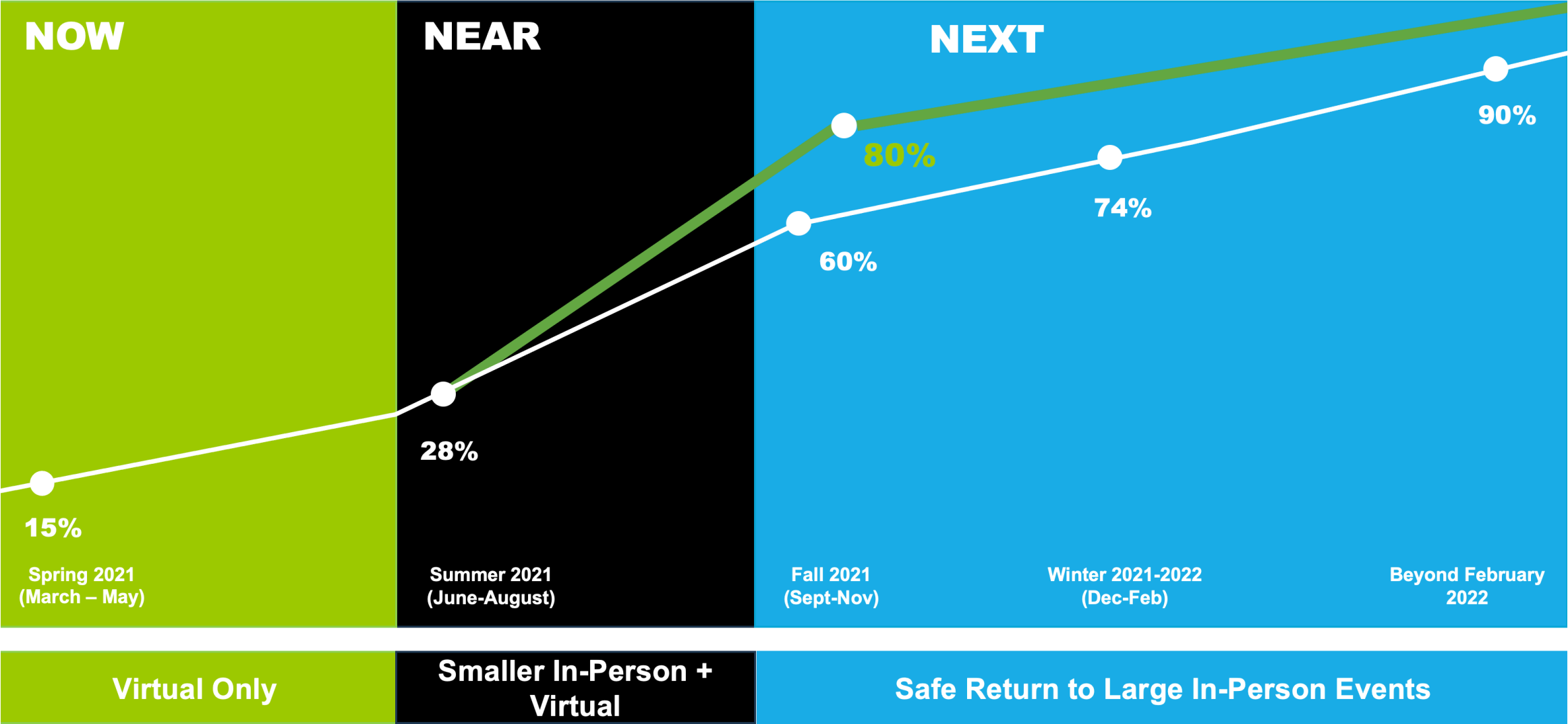
**Would you attend / exhibit at in-person events this Fall (2021)?**



# Short-term and long-term outlook



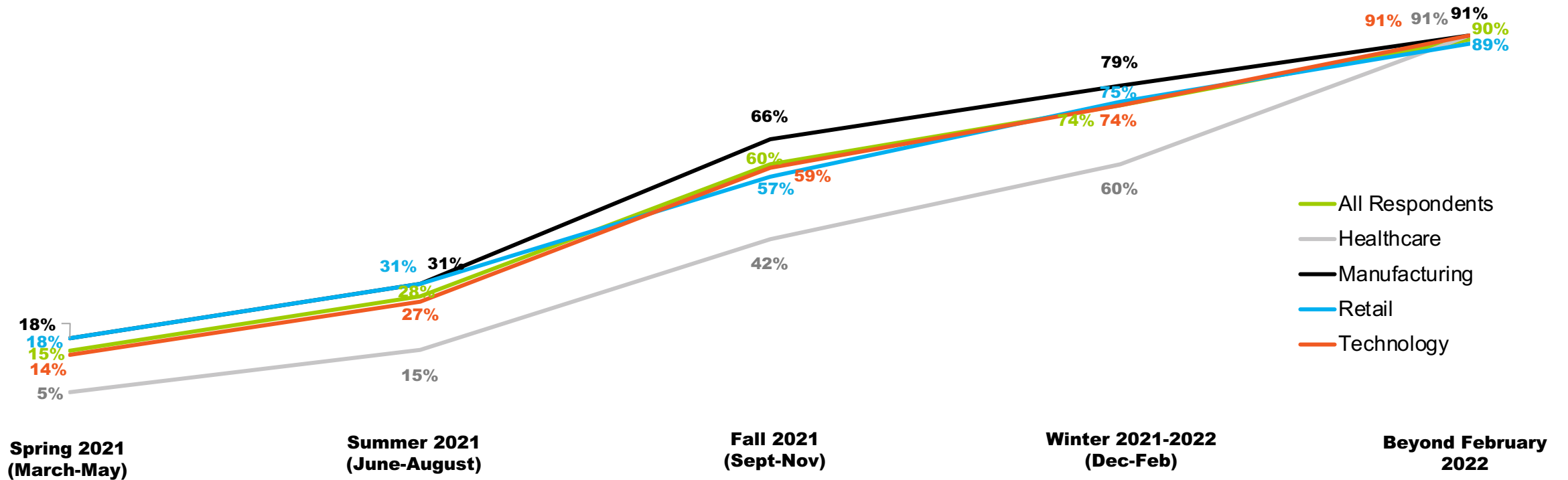
# Outlook with effective vaccine distribution





# As expected, healthcare least optimistic and manufacturing most eager to return

## WILL VACCINATION INCREASE CONFIDENCE ATTENDING IN-PERSON EVENTS?



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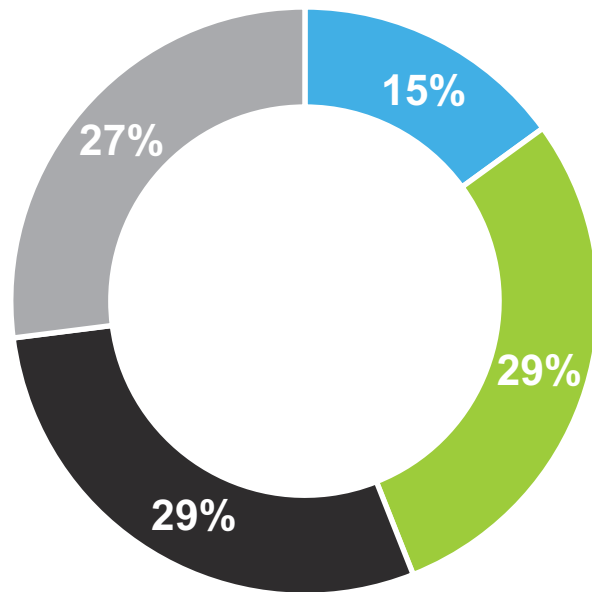
When do you see yourself attending in-person B2B events again?

# Motivators for attending events

## MID-PANDEMIC

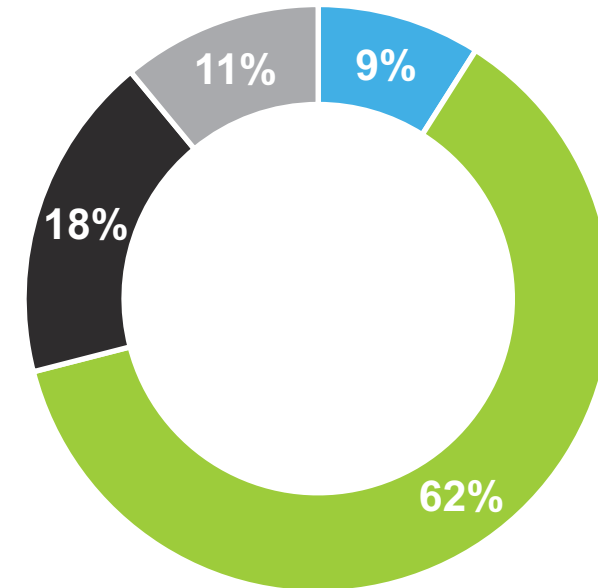
### Reasons for attending **in-person** events

■ eXperience ■ Learning ■ Networking ■ Commerce



### Reasons for attending **digital/online** events

■ eXperience ■ Learning ■ Networking ■ Commerce



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Q

**Please divide 100 points among the following broad categories such that it reflects their relative importance for your visit to a B2B in-person and digital/online event.**



# Commerce and networking more important for in-person events

## IMPORTANCE OF EVENT ELEMENTS CURRENTLY

### IN-PERSON

Base: plan to attend in-person only in 2021

1. **Exhibits (commerce)**
2. **Networking**
3. Special events
4. Education sessions
5. Keynotes / general sessions
6. Gamification

### VIRTUAL

Base: plan to attend virtual only in 2021

1. **Education sessions**
2. **Keynotes / general sessions**
3. Networking
4. Exhibits (commerce)
5. Special events
6. Gamification

### HYBRID

Base: plan to attend in-person & virtual in 2021

1. Networking
2. Exhibits (commerce)
3. Education sessions
4. Keynotes/general sessions
5. Special events
6. Gamification

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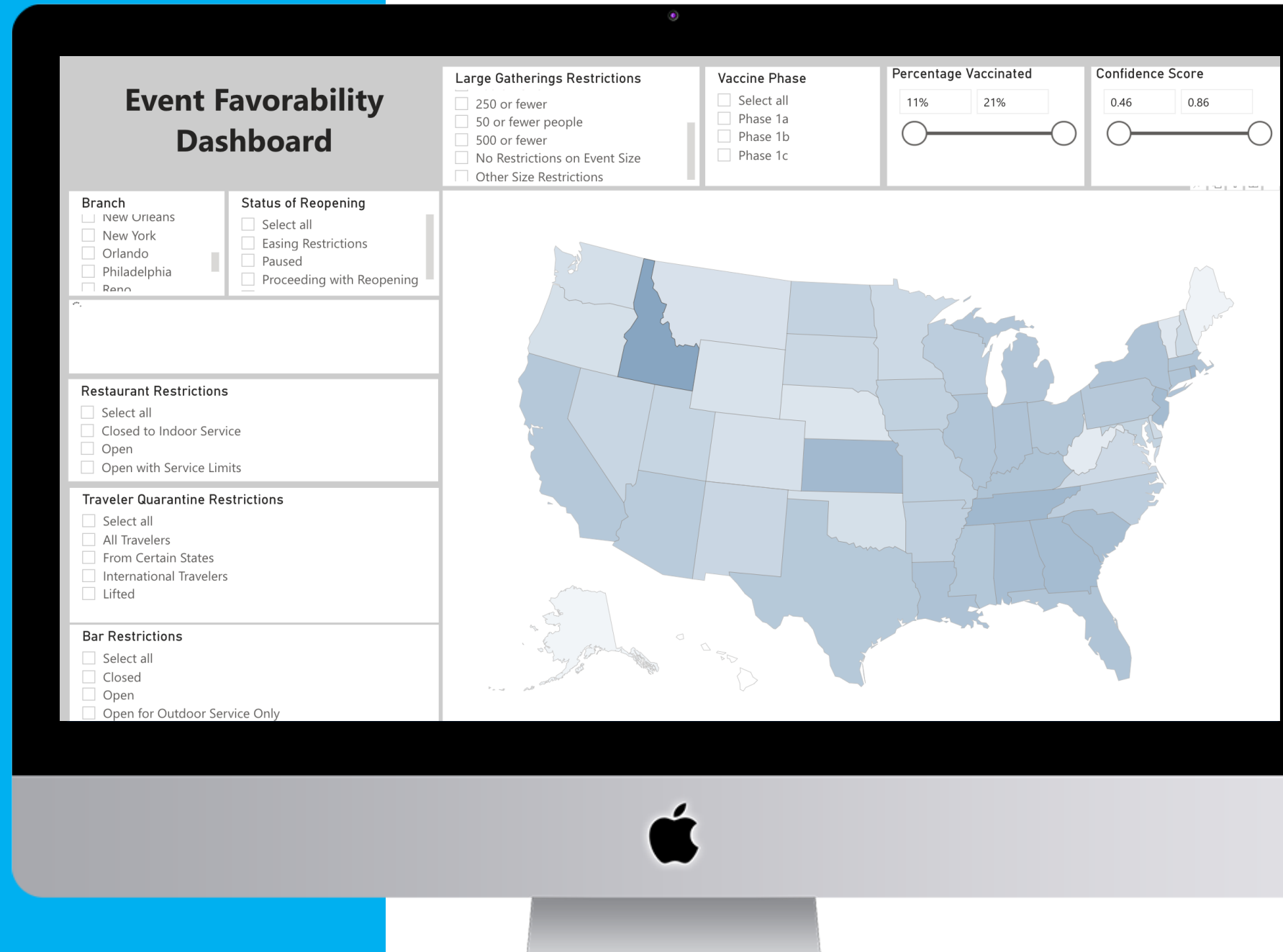


**Rank order the following activities in order of their importance when you attend events.**

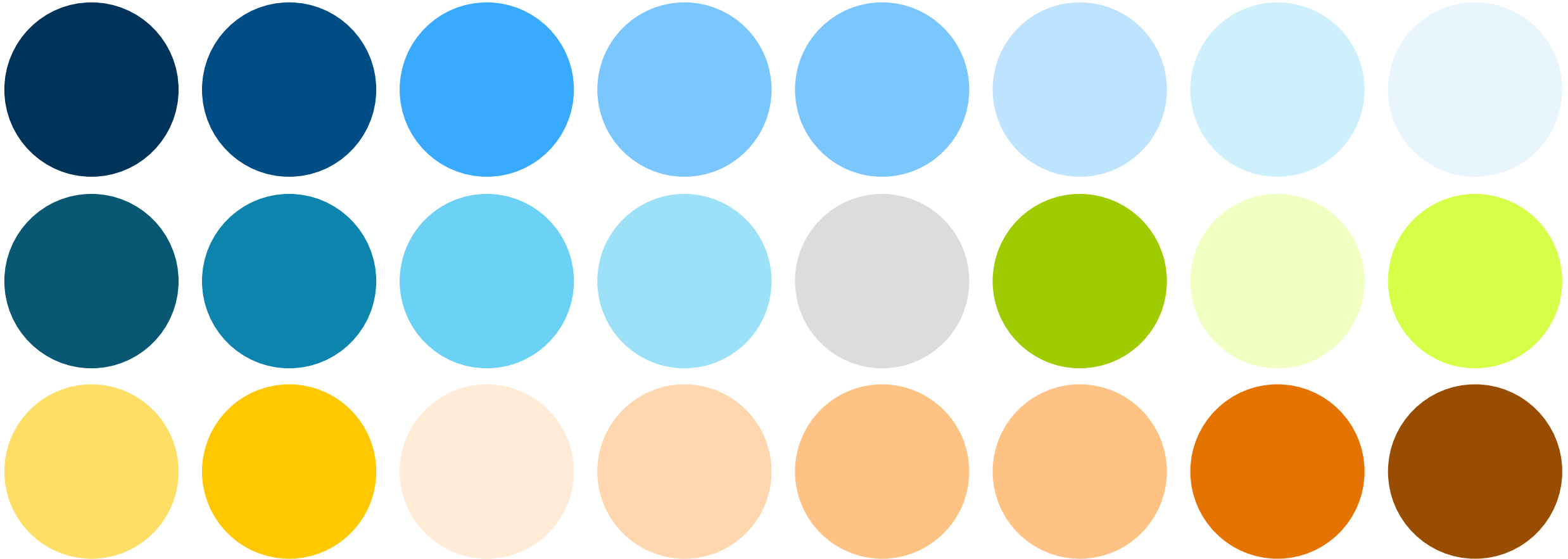




# Event Favorability Dashboard



# Everything is the same and everything is different





# Everything is the same...



**Plan**



**People**

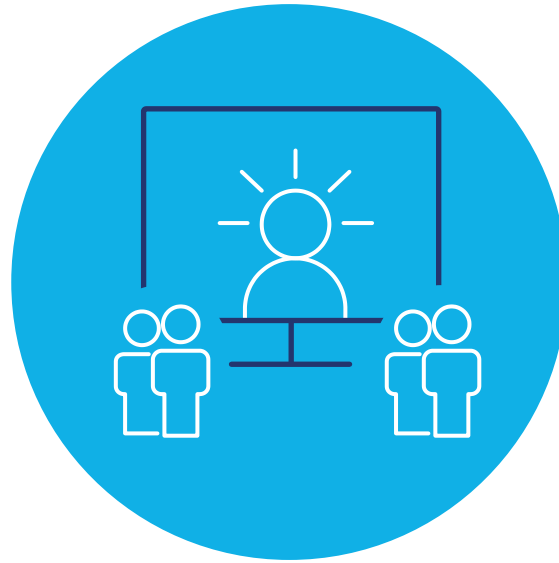


**Place**

# ...Everything is different



**Plan**



**People**



**Place**



**Time**

# **Focusing on what's top of mind & most useful now**

- ✓ **Health & safety**
- ✓ **Scenario planning**
- ✓ **Quality audience vs quantity**
- ✓ **Digital amplification & extensions**
- ✓ **Modular solutions for faster builds**





**2021 is a bridge year**



# Q & A





# Thank you

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