

US B2B Exhibition Industry Update

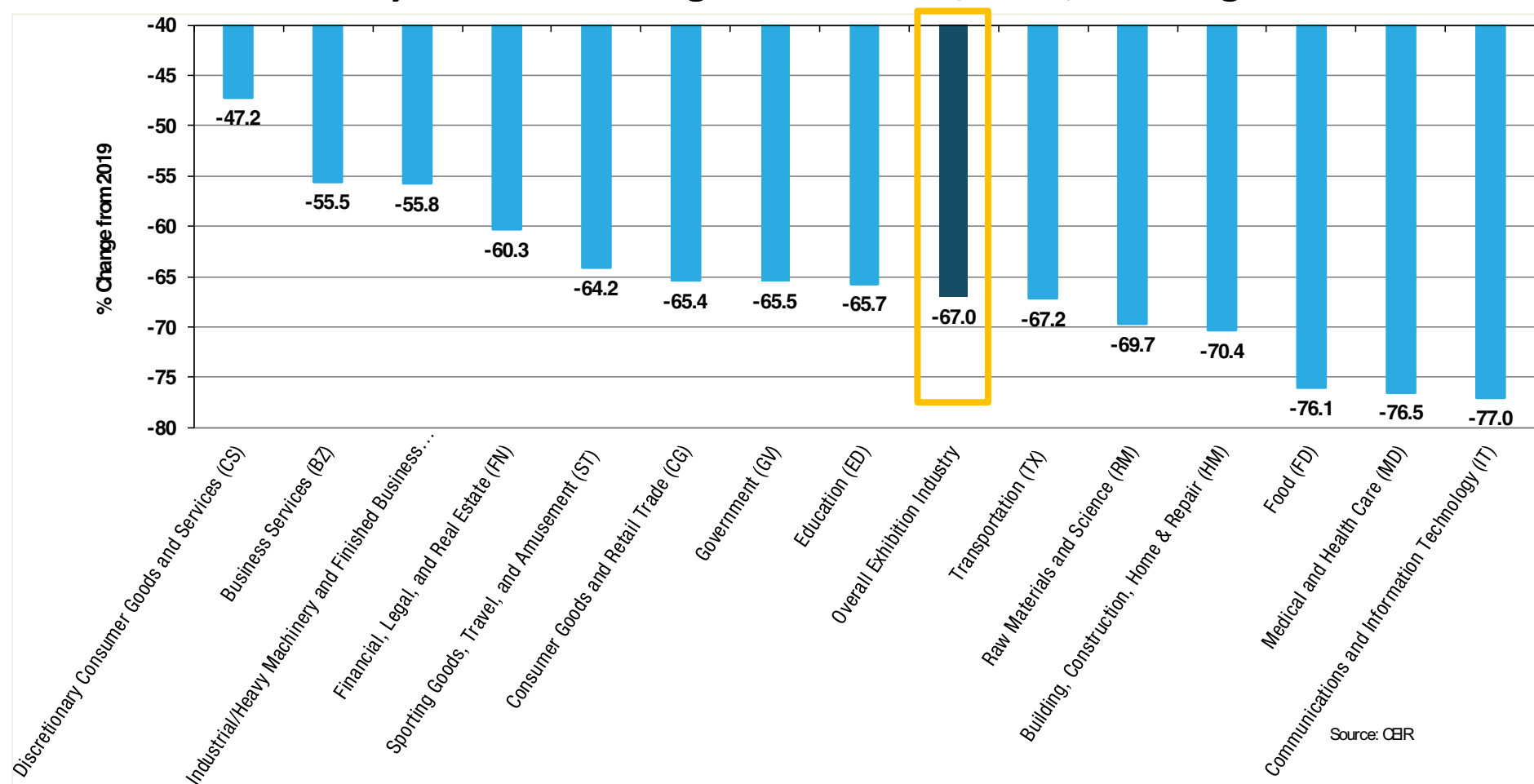
Prepared for ESCA Summer Conference

Presented by VP of Research, Nancy Drapeau, IPC

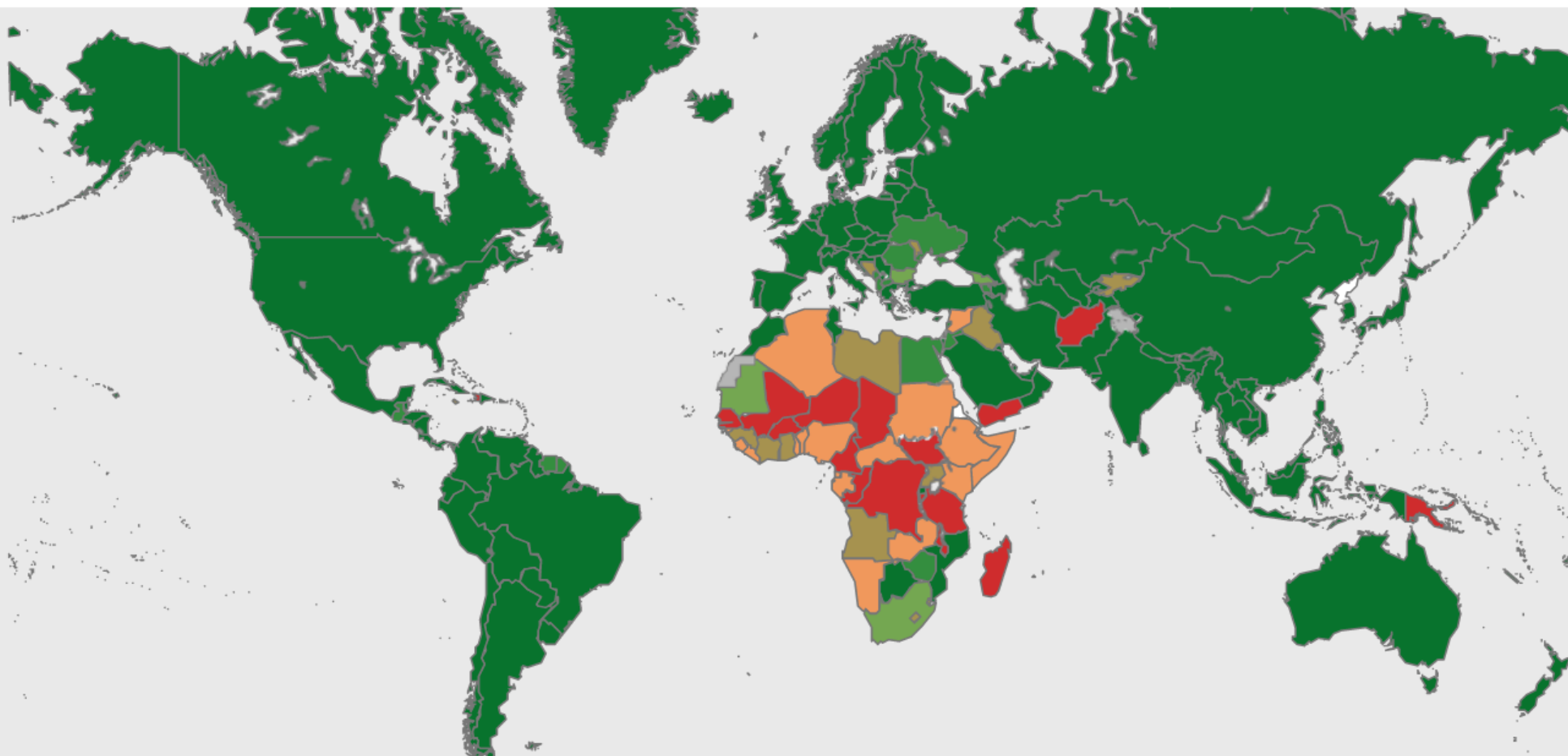
Wednesday, June 29

2021 was a tough year for the industry, across all sectors

CEIR Total Index by Sector Including Cancellations, 2021, % Change from 2019



Outlook Moving Forward?

WHO Coronavirus (COVID-19) Dashboard[Overview](#)[Measures](#)[Table View](#)[Data](#)[More Resources](#)

Vaccination



Total doses admin...

**11,864,214,773**

vaccine doses administered

5,191,662,043

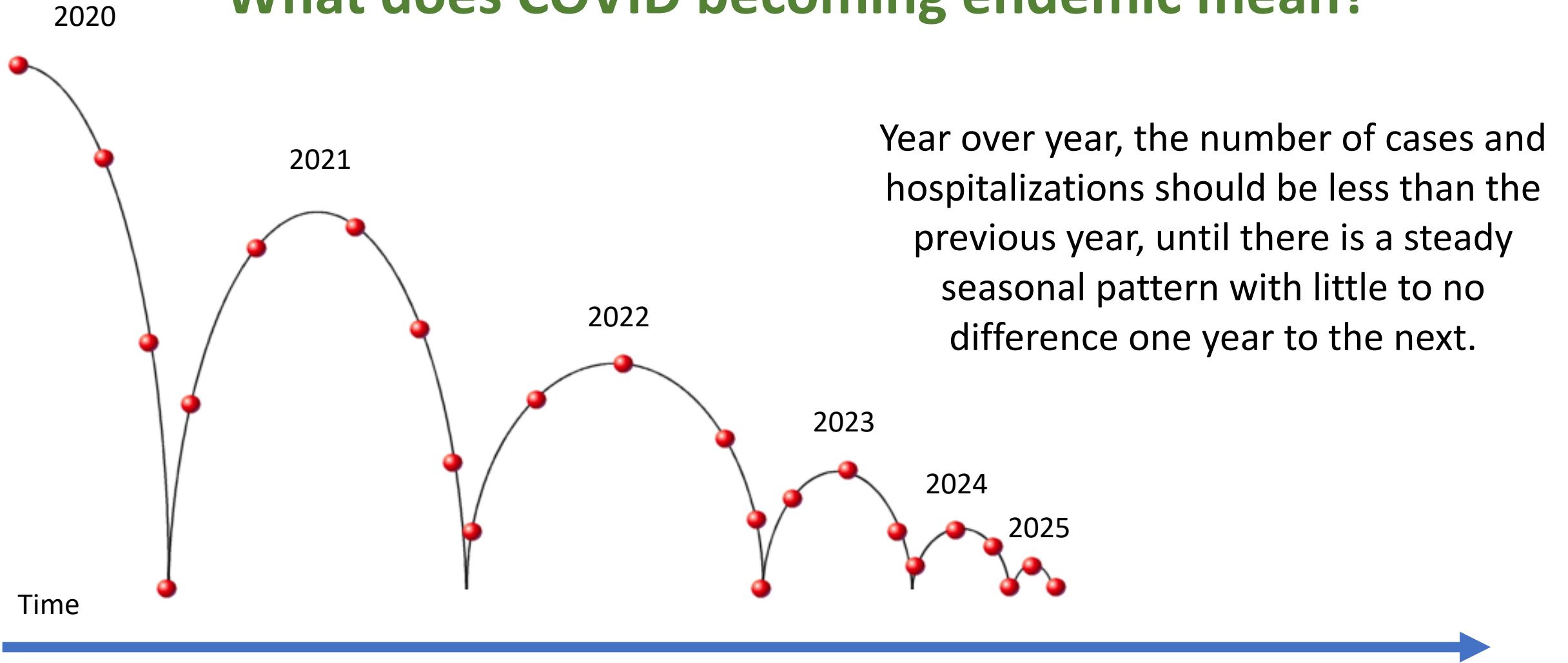
persons vaccinated with at least one dose

4,721,625,990

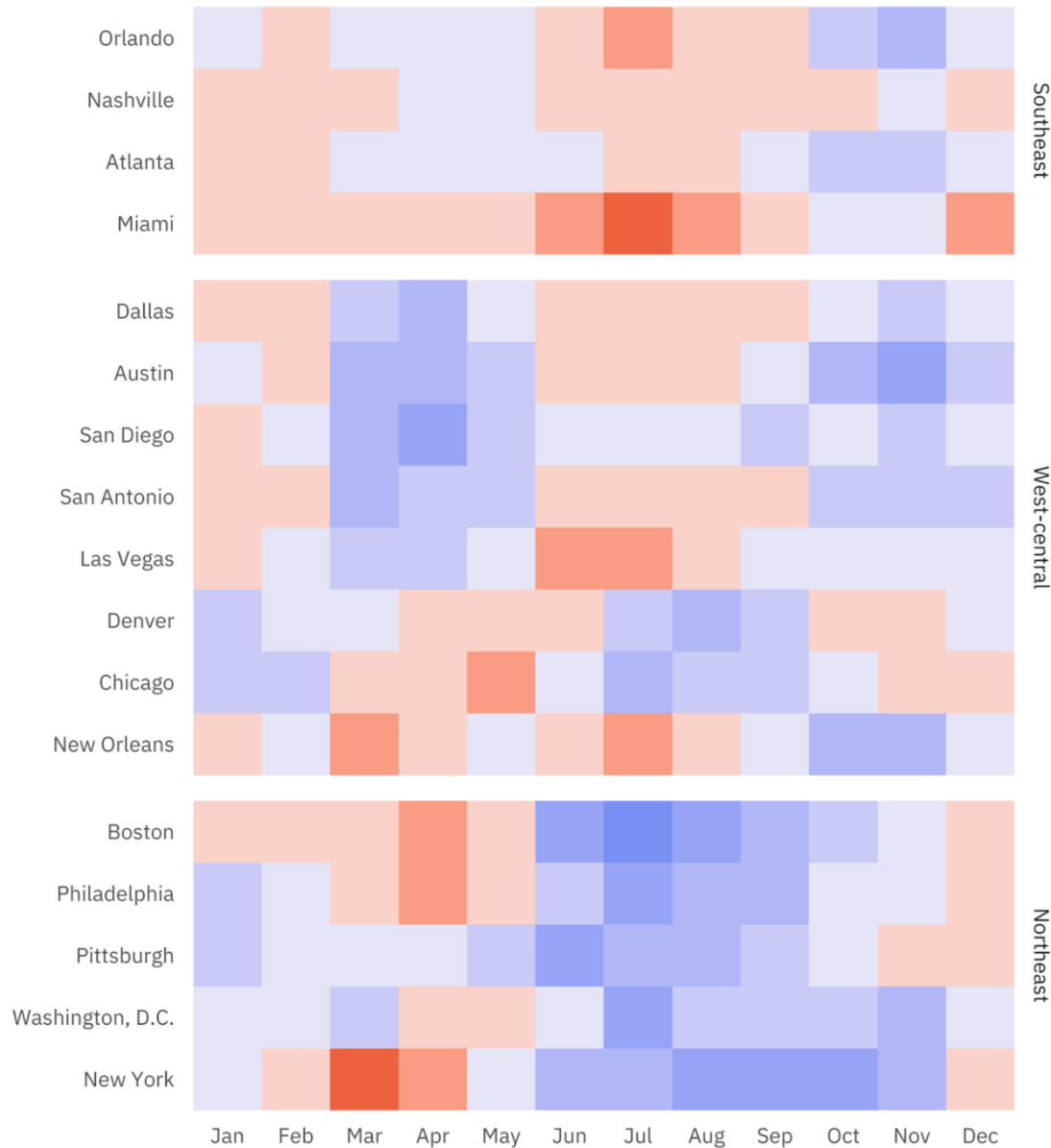
persons fully vaccinated

Globally, as of **6:13pm CEST, 14 June 2022**, there have been **533,816,957 confirmed cases** of COVID-19, including **6,309,633 deaths**, reported to WHO. As of **7 June 2022**, a total of **11,864,214,773 vaccine doses** have

What does COVID becoming endemic mean?



Seasonal COVID-19 Risk



What do the next few years look like for events?

Predictable patterns of COVID by city.

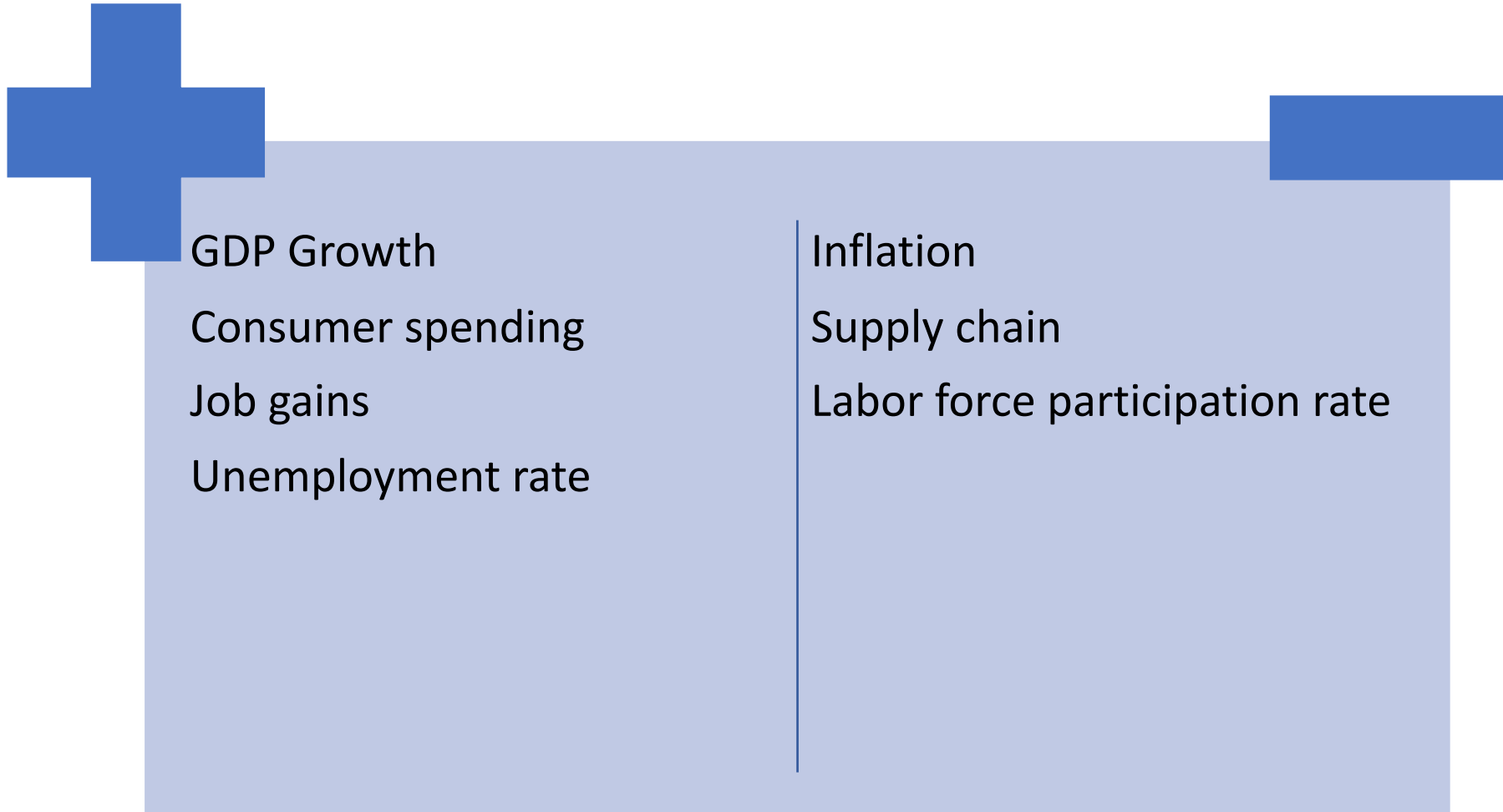
Predictable patterns of COVID by month.

Meaning...

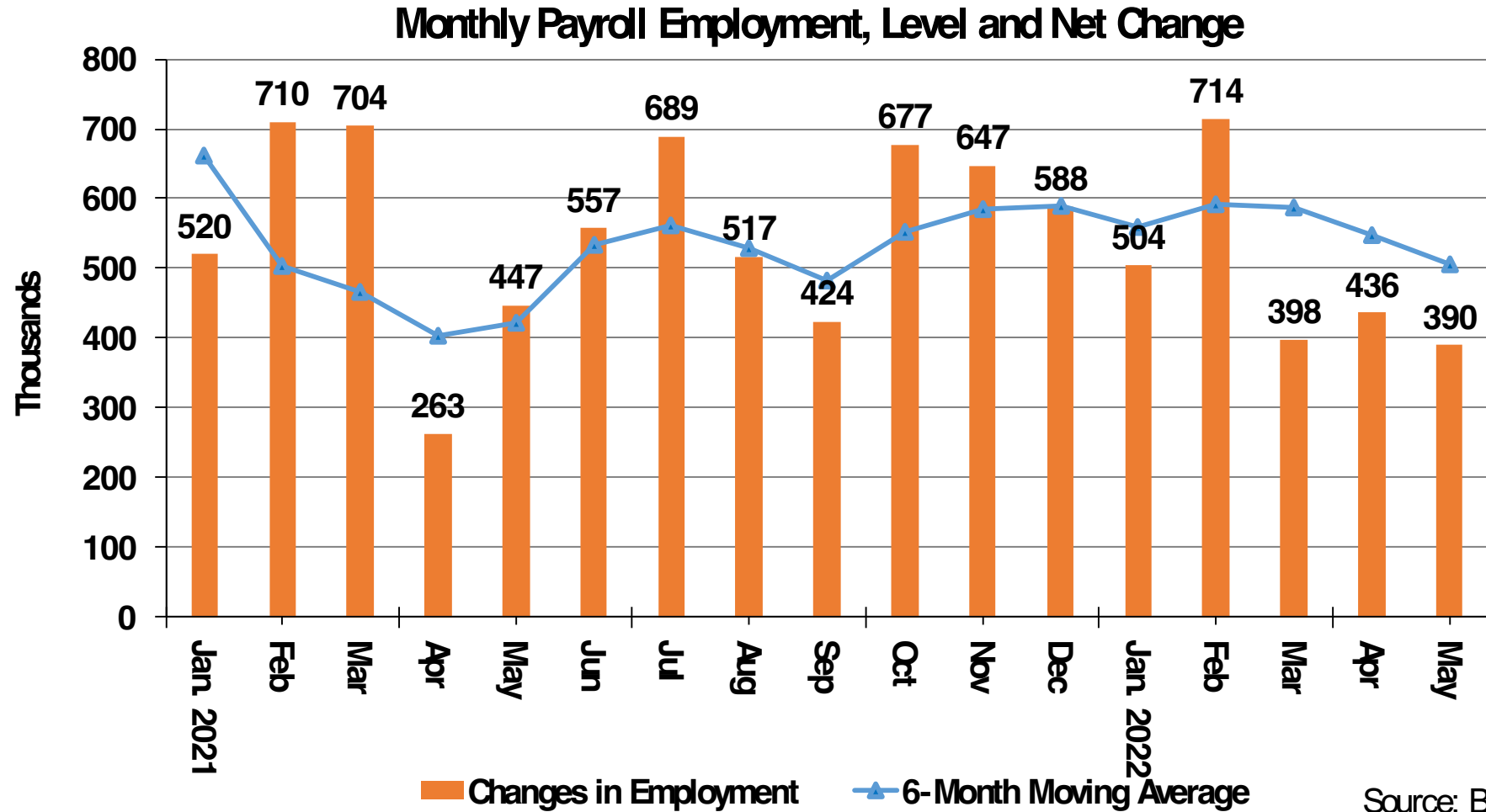
Organizers can communicate months in advance about safety plans and what might be required at their event.

Organizers can look at shifting timing and location of events based on demographics.

Outlook for Macroeconomy Is Strong – More KPI's are positive than negative



Job increases in the past few months have surpassed expectations, averaging about 500 thousand jobs during last six months.



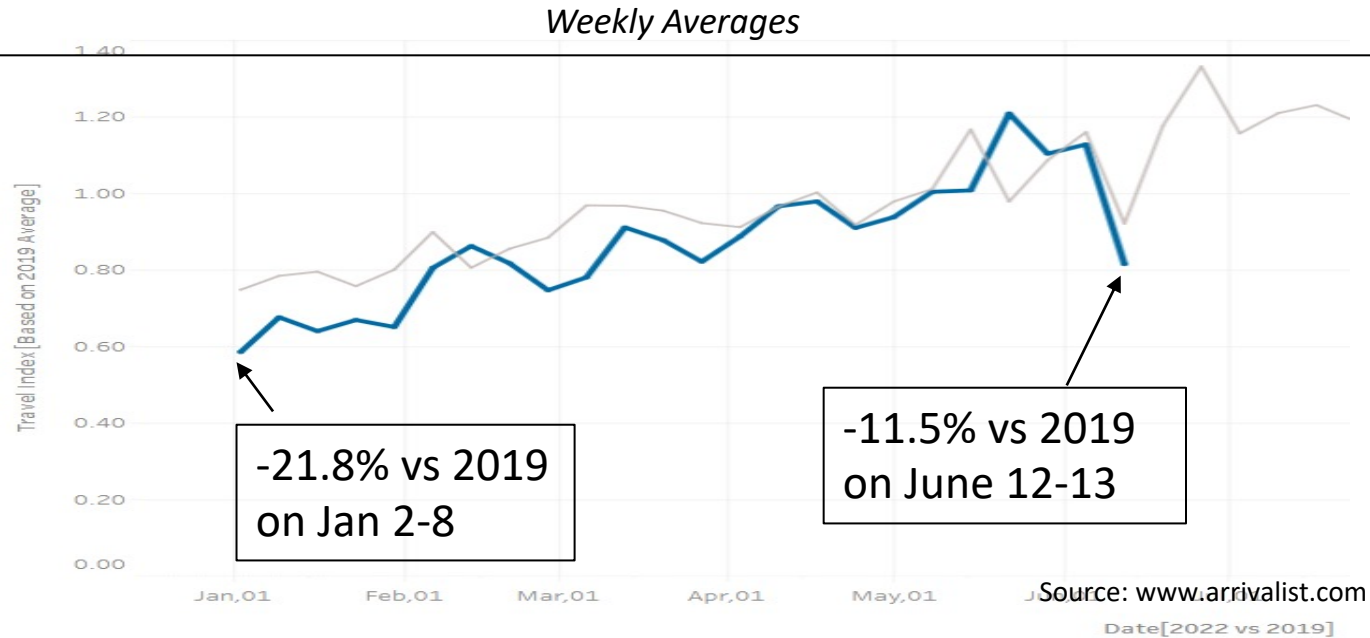
Source: BLS

Travel recovery slowed with onset of Omicron, though is rebounding in 2022.

Positive trends continue for travel though likely to remain below 2019 levels this year:

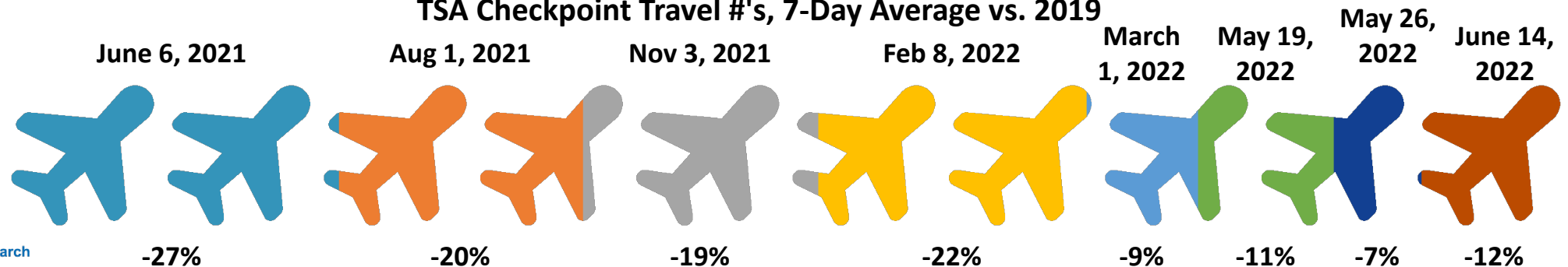
- ✓ Lifting of proof of negative COVID test for International Travelers as of June 12.
- ✓ Domestic business trips improving – 65% usually allowed; international trips lagging – 45% usually allowed. (GBTA survey)
- ✓ Per US Travel Assn April data: US overseas visitors, improving, though varies by region:
 - ✓ Overall, 43% below 2019
 - ✓ European markets down just 34% vs 2019
 - ✓ Asian markets are most challenged, down 71% largely due to restrictions in individual countries

Driving trends took a hit at outset of 2022, though align with 2019 starting in April, then decline slightly, likely due to rising gas prices



Source: US Travel Association May Report and April GBTA Member Survey

TSA Checkpoint Travel #'s, 7-Day Average vs. 2019



Industry sentiment signals upcoming rebound – exhibitors more bullish than attendees.

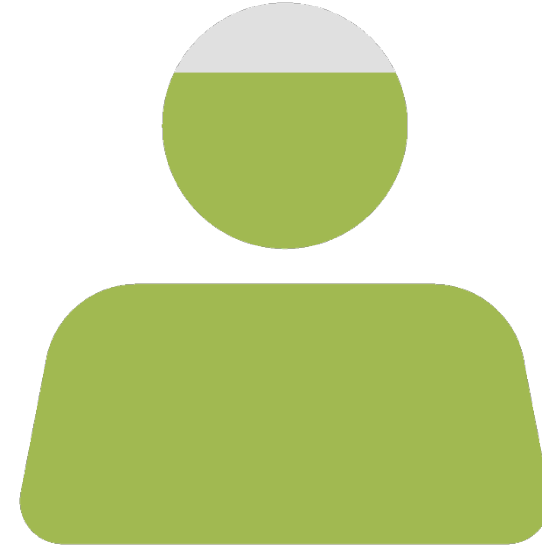


Exhibitors with Plans to Exhibit in 2021 through 2022



94%

Attendee Plans to Attend in 2021 through 2022



87%

Why a rebound is expected.

Exhibitors

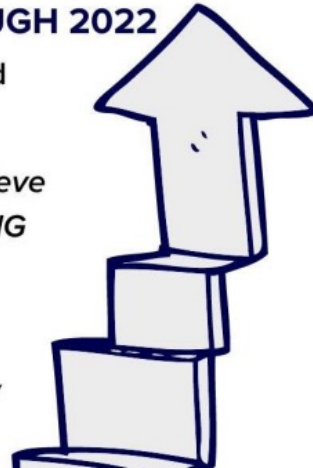


WHAT MOTIVATES STRONG INTENT TO EXHIBIT THROUGH 2022

B2B exhibitions are highly valued in helping to meet marketing and sales objectives.

40%+ assign highest value for helping achieve most popular high priority **MARKETING OBJECTIVES.**

31%+ assign highest value for helping achieve most popular high priority **SALES OBJECTIVES.**



Why a rebound is expected.



Attendees

MOTIVATIONS FOR ATTENDING B2B EXHIBITIONS

Most attendees come with a dual agenda in mind.

Shopping



98%

Learning



97%

TOP RANKED REASONS FOR ATTENDING TIE BACK TO ACHIEVING SPECIFIC SHOPPING AND LEARNING OBJECTIVES.

It is all about engaging with products and people to achieve their goals.

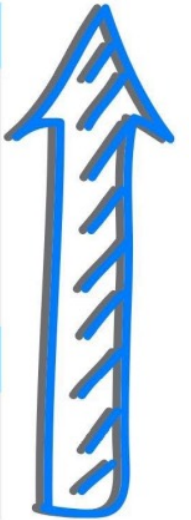
Shopping



See, experience new technology	89%
See, touch, experience new products	86%
See, experience new product introductions	86%
Build, maintain supplier relationships	84%
Talk to experts	83%

Learning

Keeping up to date with industry trends	90%
Professional networking	79%



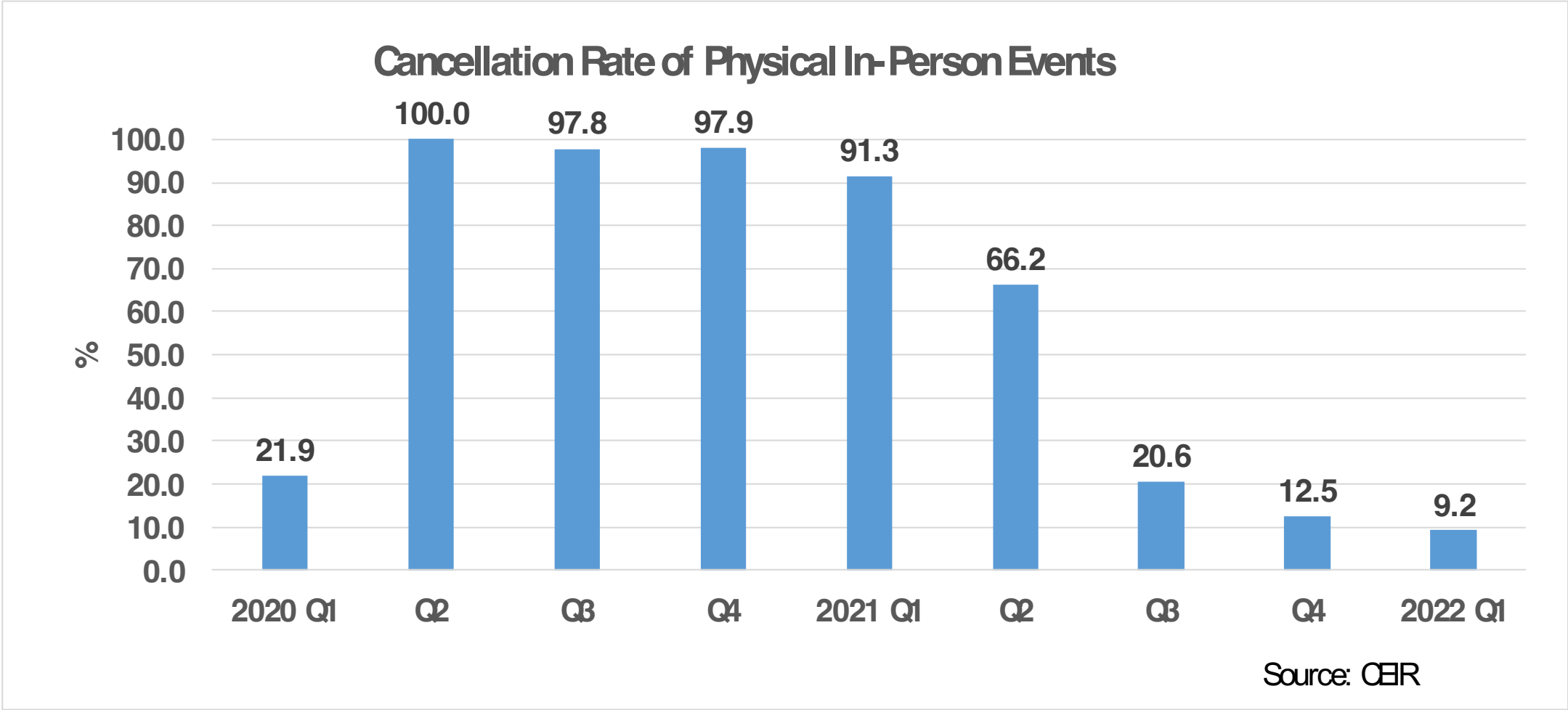
B2B EXHIBITIONS ENJOY A POWERFUL REPUTATION FOR DELIVERING ON ANY IMPORTANT REASON FOR ATTENDING.

70+%

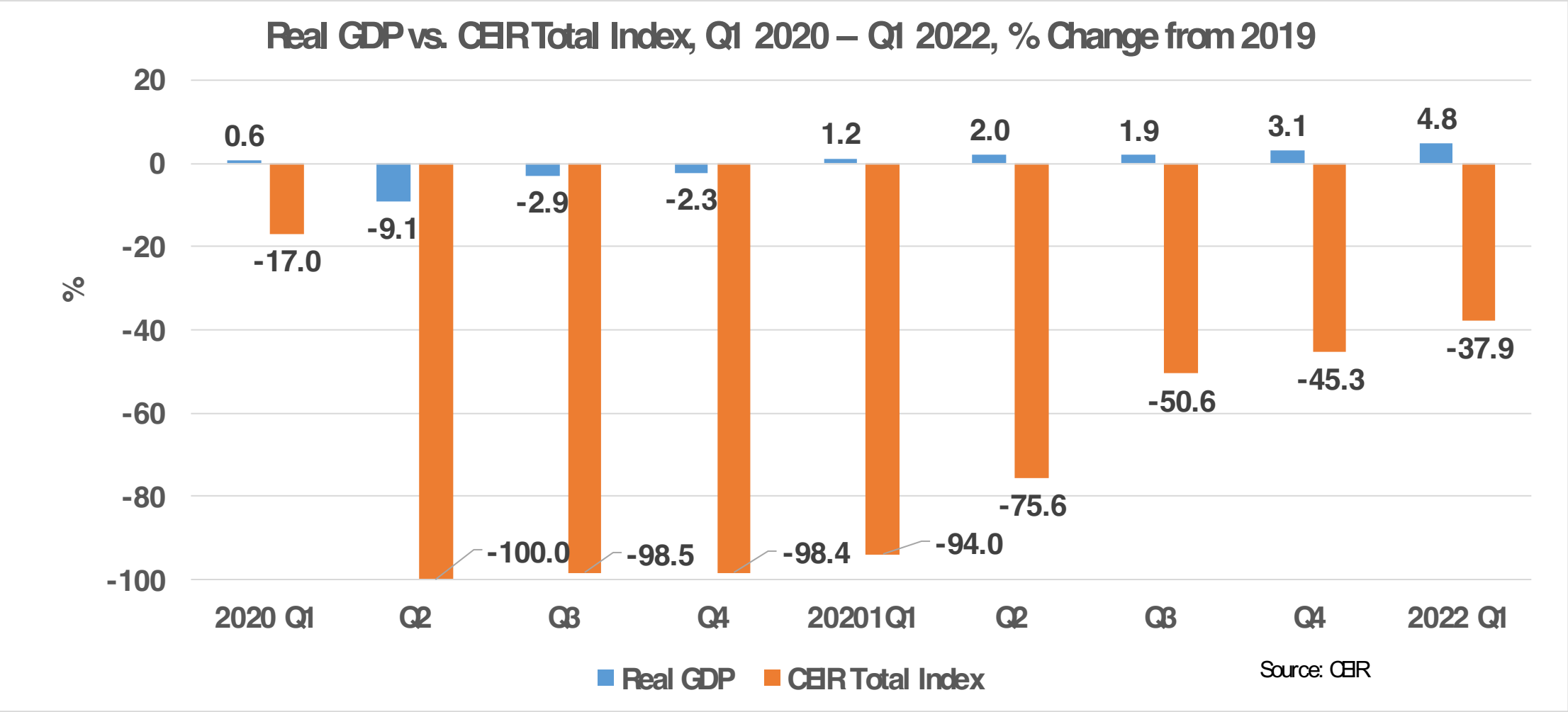
of attendees say they are effective in meeting their needs.

CEIR 2021 & Q1 2022 Index Results

Performance since Q2 2021 has moved in the right direction, with cancellation rate declining each quarter

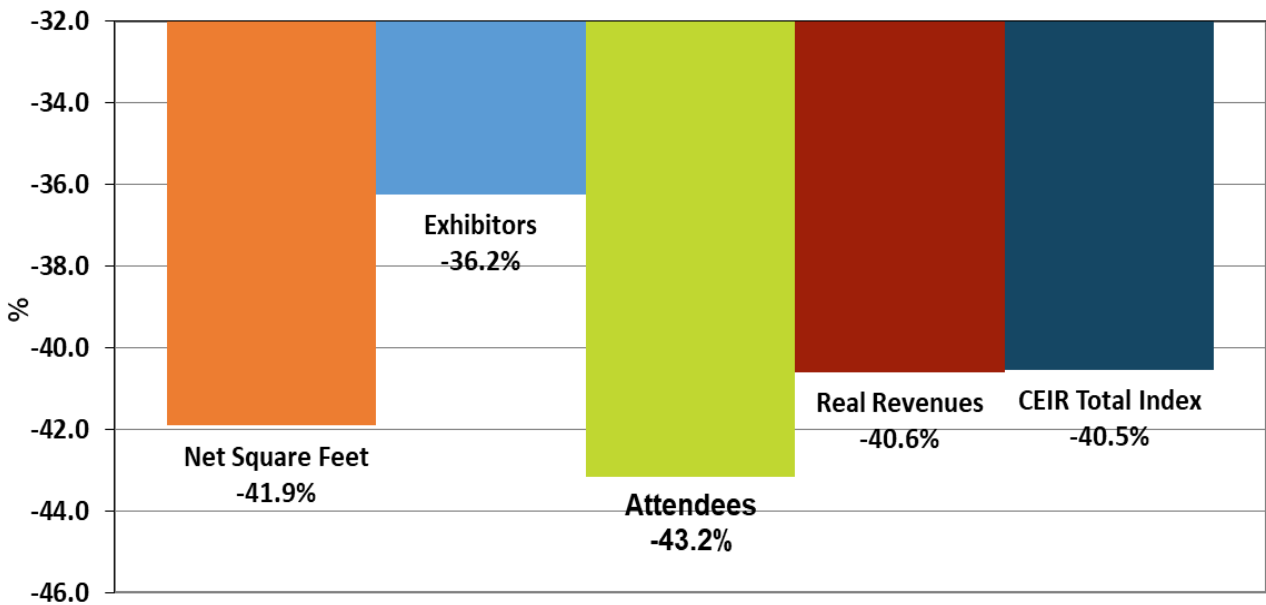


Expected rebound is in play



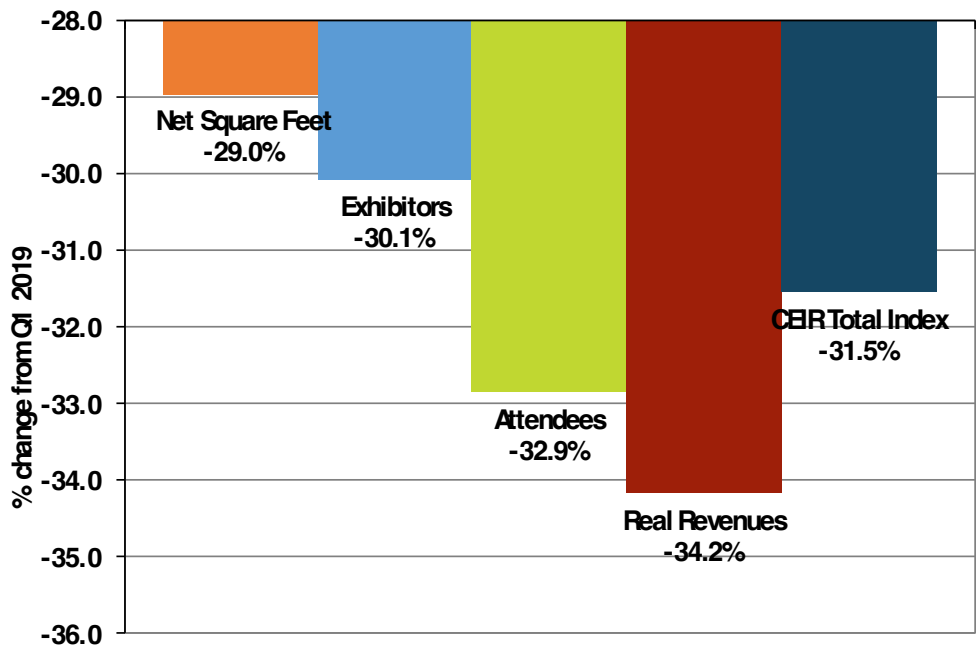
Metrics are slowly improving among events held

Q4 2021 Overall Exhibiting Industry
Excluding Cancellations, % Change from Q4 2019



Source: CEIR

Q1 2022 Overall Exhibiting Industry
Excluding Cancellations, % Change from Q1 2019



Source: CEIR



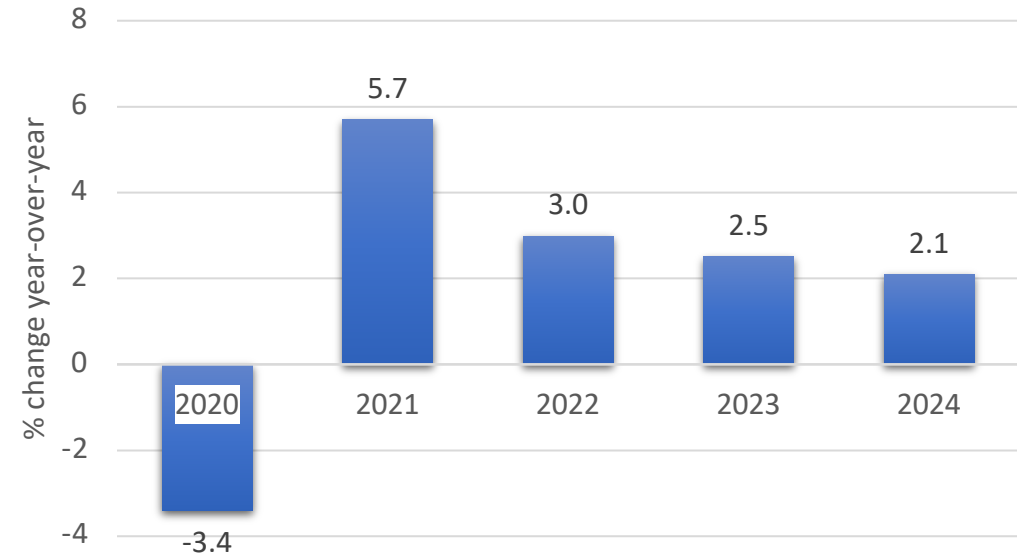
Most Likely Scenario

Base Case

Worst of New
Variants New
Cases is Behind
Us

By Q2 2022
Enough Americans
Are Protected to
Achieve Herd
Immunity

Real GDP Growth



CEIR Total Index Deviation from 2019

