



**MEMORANDUM**

To: Fairgrounds and Exposition Center Industry Representatives  
 From: CSL International  
 Date: June 8, 2020  
 Subject: Impacts of COVID-19 on Fairgrounds and Exposition Center Industry

There has been much uncertainty regarding the COVID-19 pandemic, first with the impact of the virus on society and then with the impact on the economy. With each individual state and municipality taking different approaches to trying to contain the spread of this virus, we felt CSL was uniquely positioned to help gather market research among fairgrounds, exposition centers and state/county fairs throughout North America and share some of the experiences and best practices each venue/event has been employing to try and make it through these difficult times.

During the week of May 18, 2020, CSL distributed a nine-question survey to 750 representatives of fairgrounds, equestrian, livestock and exposition facilities. The survey sample was assembled from a database of International Association of Fairs & Expositions (IAFE) members. A total of 115 responses were collected.

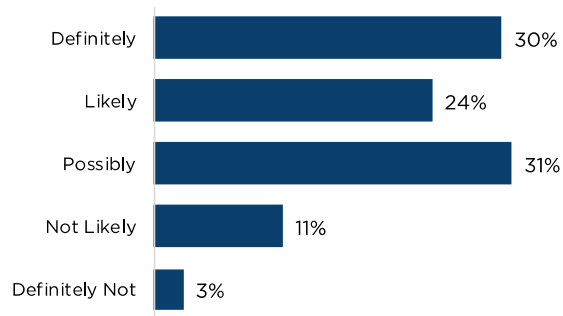
The intent of the survey is to advance the understanding of key impacts of the COVID-19 pandemic, including event postponements and cancellations, and the responses being implemented among various event facilities and event organizers.

**IMPACT ON EVENTS THROUGH END OF 2020**

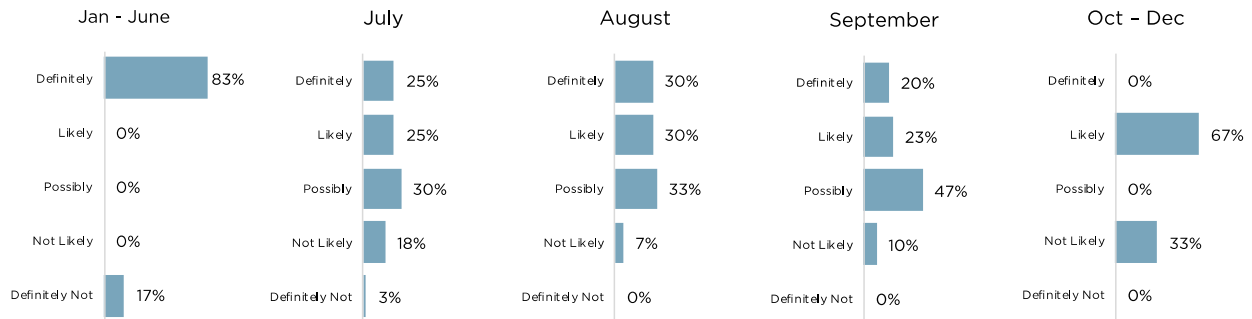
Approximately 86 percent of survey respondents indicated that there is at least a possibility of cancelling their primary event/fair for the 2020 year.

Data suggest that nearly 60 percent of events typically held in August or earlier are either Definitely or Likely to cancel their event. This percentage eases slightly among events typically held in September and beyond; however, respondents also indicated a limited chance of postponing (rather than cancelling) primary events.

Likelihood of CANCELLATION of this year's Fair (or largest facility event)



MONTH/PERIOD of this year's expected cancellation



In addition to the largest event/fair held at their respective venues, respondents were also asked to estimate the impact on secondary (or other) event activity through the remainder of 2020.

Nearly **60%** of respondents indicated that at least half of their regular event activity will be cancelled in 2020, with **14%** of respondents indicating that all of their 2020 events are being cancelled.

## INDUSTRY RESPONSE STRATEGIES

The question we are left with is what can be done about producing revenue and supporting our communities with social distancing and other restrictions still in place. Thankfully, fairgrounds and exposition facilities have become increasingly flexible and creative with finding new ways of raising funds by providing services that cannot be offered elsewhere. In fact, nearly one in three responding fairgrounds and exposition facilities are conducting some creative, non-traditional revenue generating activities, outside of typical event space activity.

Many communities throughout the country have opened up their grounds to provide space for farmer's markets and/or flea markets, while others have converted the underutilized space within their structures into makeshift storage space. A number of venues also noted that they are renting out RV and/or campground space for essential front-line workers and/or to provide services for assisting communities battling the COVID-19 pandemic. While these activities are not compensating for the loss of all events at their respective complexes, they are providing a much-needed service to the community and generating some income for the facility.

Individual fairgrounds have taken this a step further in creating fun, family-friendly events that follow social distancing guidelines. We have highlighted some of these unique examples below:

- A county fair in northern California created an event called 'Fair Food Fridays'. Every Friday in May and June, between 11:30am and 7:30pm, the community can drive through the fairgrounds and purchase traditional fair foods, such as funnel cakes, cotton candy and caramel kettle corn from local vendors at prices ranging from two dollars to ten dollars. This event has not only helped to provide a taste of the fair for the community, it has provided support to the food vendors who have been hit hard by COVID-19. The CEO of the fairgrounds stated that "[we] wanted to bring something positive to the fairground and give the community something fun to do while still aligning with pandemic guidelines".
- Starting in mid-May, another county fairgrounds in Iowa partnered with a local radio station to start hosting drive-in movie nights once or twice a week, utilizing the back of their grandstand. The event functions as a fundraiser for the county fair, but allows for community members to come together and watch a variety of family-friendly movies such as 'Spiderman: Far From Home', "The Secret Life of Pets 2", and "Toy Story 4". Attendees pay five dollars per person or fifteen dollars per car, must keep vehicles at least six feet apart and tune their car radio to receive the broadcast the audio for the movie. The fairgrounds has even created themed movie nights such as 'Kids Night', and 'Teen/Adult Night'.
- A third county fair in Texas helped to create an 'Exhibitor Recovery Sale' for 4-H members who could no longer sell their livestock. The county fair board decided to help secure donations for the individual exhibitors through the form of 'add-on bids', in lieu of their livestock being purchased. The Recovery Sale allowed both the local and non-local community to place a bid on any exhibitor by reaching out to the Fair office. The Fair receives 5.5 percent of sales, which has been dedicated to funding the 2021 Fair and supporting the Fair's scholarship fund.

The importance of community connection and support during this trying time is at the forefront of the minds of many communities throughout the country. Nearly 40 percent of respondents employed some sort of activity to provide support to the local community. Among the most common responses are highlighted below, along with specific examples given:

- Food Bank Support / Food Distribution (Curb Side pick-up, Food Donations, Food Storage):
  - “Set up a drive-thru food pantry in partnership with Sysco Foods.”
  - “Donated some of our refrigerators and space to help the local food bank.”
  - “A local group is using the fairgrounds to hand out free meals three days a week.”
- Blood Drives / Community Fundraising:
  - “Providing space for a local group one morning a week to supply masks, gloves, and other PPE to area residents.”
  - “We have been the location for community blood drives.”
  - “Created partnerships with area events to help support local hospitals and government agencies.”
- COVID-19 Support Services (Testing Sites, Homeless Shelters, Essential Working Housing):
  - “Opened the fairgrounds to the national guard to facilitate the distribution of essential supplies to front line workers.”
  - “Providing quarantine housing for the homeless.”
  - “We are a COVID Drive-Thru Testing site and an Isolation/Quarantine PPE Warehouse.”

Respondents have also employed other mechanisms in an effort to support their community such as utilizing social media platforms to create a virtual fair to bring community members together, offering up the grandstand and stage for socially distanced graduation ceremonies and setting up on-line livestock sales.

We thank the many participants of this important research. This research is intended to provide information as to the impacts of the COVID-19 pandemic on the fairgrounds, exposition, equestrian and livestock facility sector. Additional research summaries will be forthcoming.

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*Conventions, Sports & Leisure International (CSL) was founded in 1988 specifically to provide focused and independent research to the event facility industry. The professional resources at CSL include more than 180 years of combined industry experience and a large staff of highly-trained consultants. We have provided consulting services concerning more than 2,000 multipurpose fairgrounds/exposition center, civic, convention, conference, sports, entertainment, hospitality and other event facility projects throughout North America. We are constantly conducting direct outreach and market research to provide our clients with actionable information to guide decision-making for facility development, expansion and optimized management. The objectivity and value that we bring to each project is highlighted by the large number of clients who have retained us for multiple engagements over the years.*

*CSL is a wholly-owned subsidiary of LEGENDS, a world leader in assisting venues and brands with developing strategies and solutions that position them for long-term, unparalleled success by motivating and engaging constituents, fostering loyalty, creating best-in-class venues, enhancing the patron experience, and driving incremental revenues. LEGENDS has developed an industry-leading Venue Reintegration Platform (VRP), which is a comprehensive program focused on fan and attendee experience, venue operations and technology designed to protect the public assembly facility guest by enabling a safe return to facilities.*

*Joel Feldman is a Project Manager with CSL with over 13 years of experience. His work on over 200 facility-related engagements offers objective insight into current and future opportunities for equestrian, livestock, fairgrounds, exposition and other event facilities. For more information on this research or other insight from CSL, please visit our website at [www.cslintl.com](http://www.cslintl.com) or email at [info@cslintl.com](mailto:info@cslintl.com). Information about LEGENDS and the VRP can be found at [www.legends.net](http://www.legends.net).*

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