

PCMA CONVENE

COVID-19 SURVEY**SURVEY DATES: DECEMBER 14-17**

COVID-19 Recovery Dashboard

Survey and analysis by **PCMA Convene** editors

Charts and design by Point Five

We could all use some good news as we come to the end of what has likely been the most trying and heartbreaking year professionally and personally for so many in the business events industry. So here it is: We are all more hopeful.

According to the latest COVID-19 Recovery Dashboard, conducted Dec. 14-17, 11 percent more suppliers and planners checked off “hopeful” when asked how they were feeling: Nearly half of suppliers (49 percent) and 54 percent of planners. Planners, in particular, have come a long way since October when we first asked them to share their emotional state — only one-third expressed optimism at the time.

There is good reason for the lift. The week this survey went out was the week the first COVID-19 vaccinations were distributed to American health-care workers, the first wave of the population to receive them — giving this industry and so many others a literal shot in the arm. Seventy-three percent of suppliers and 66 percent of planners said that the approval of effective COVID-19 vaccines had changed their thinking about what might be possible. And 10 percent of planners said they had reserved space or initiated booking space as a result of the news.

As effective vaccines became a reality, we asked this month’s 554 respondents — 375 planners and 179 suppliers — a new question: Would they be asking future attendees and staff at face-to-face events (whether as the event organizer or host venue or other supplier) to show proof of vaccination in order to be allowed entry? Both planners and suppliers were fairly aligned on this — only 32 percent of meeting professionals and 38 percent of suppliers will make that a requirement.

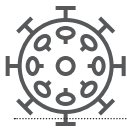
How We’ll Come Back

Respondents are anxious to move forward, whether in person — one planner wrote: “Done with virtual events. Bring back live events.” — or digital, or a combination of the two. Or something entirely new. This planner respondent said: “We believe the event community will need to run multiple marathons to get on the other side. Therefore, we’re asking: How might we think another way beyond the ‘omni-channel’ approach to consider what doesn’t yet exist?”

Another planner summed up the near-future based on current realities: “I think the desire to meet and get back to in-person meetings is there, but we have seen a number of uncontrollable factors impact our decisions, such as corporate travel bans through July 1, 2021, and a lack of clearly defined quarantine rules when traveling and upon return.”

Meanwhile, the appetite to meet in person with all of the safety protocols that requires may be waning on the supplier side. The 34 percent of suppliers who had attended a face-to-face event in recent days were less enthusiastic about the experience than last month — 65 percent vs. 72 percent in our last survey said the event was worth all the safety protocols and PPE, and 33 percent vs. 23 percent last month don’t see this as a viable option for most groups.

And a greater percentage of suppliers (36 percent vs. 31 percent last month) said they are focusing their



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reskilling efforts on providing digital experiences, while a smaller percentage are spending time developing new business models (38 percent vs. 46 percent last month). This may indicate a growing acceptance that hybrid events will be the industry's enduring model.

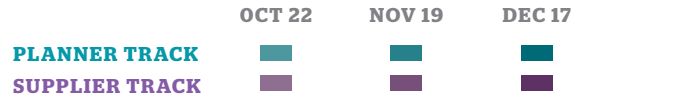
How We're Coming to Grips With Tech

Planners seem more content with tech providers for their virtual events — 65 percent expressed satisfaction vs. 58 percent last month. On the other hand, suppliers indicated that they are seeking more counsel from colleagues when it comes to technology. Thirty-two percent this month vs. 23 percent last month said they had joined an online community group to get tech-provider recommendations.

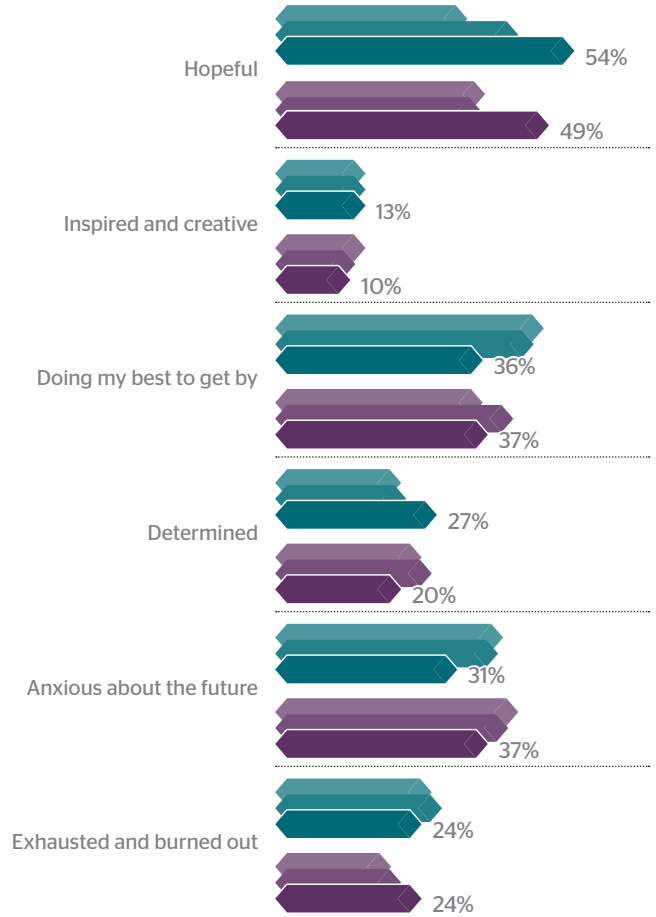
Nonetheless, planners say they continue to struggle with finding seamless solutions to their tech needs. Wrote one: "We have learned that there is no 'one-stop shop.' We have had to change platform vendors for every program held to date because they are all different in objectives. What I use for a 5,000-person, customer-facing program is not what I can use for a 400-person training program. And I wish they would all just get native API, chats, and project management teams — very frustrating. Lot of 'selling dreams and servicing nightmares' taking place."

Several planners' responses underscored that that how no matter how advanced the platform, it just can't replicate face-to-face interactions. What's lacking, one wrote, is "Mimicking walking around a room networking, not random matching, not signing up for a time slot."

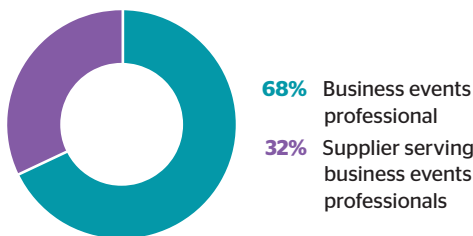
As the pandemic wears on, the business events industry continues to lean on one another for support. This month, 57 percent of both suppliers and planners, an increase for both groups from last month, said they have joined community groups for help. What are they looking for most? Ninety-four percent of planners and 85 percent of suppliers are looking for their peers to share their ideas as they navigate the future.



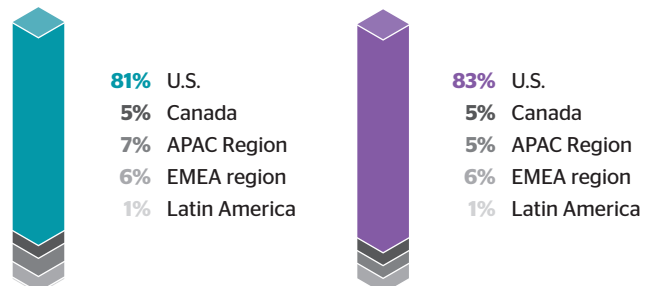
We appreciate your input in this survey. We'd like to check in with you first. What best describes how you're feeling right now? (Choose all that apply.)

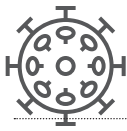


What best describes your role in the business events industry?



What region best represents where you do the majority of your business?





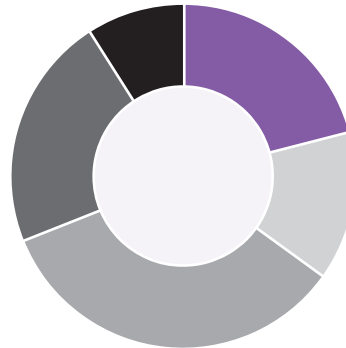
PLANNER TRACK

SUPPLIER TRACK

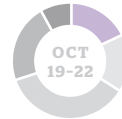
During the period of time it takes before the COVID-19 vaccine is widely distributed, what is the farthest distance from your home you would consider traveling to a business event, assuming there are no financial or regulatory restrictions placed on travel?



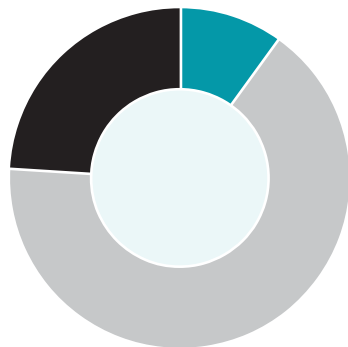
- 38%** I would not travel.
- 10%** Within a two-hour flight.
- 25%** Any distance necessary if the program was worth it.
- 18%** Within a four-hour drive.
- 9%** Within a five-hour flight.



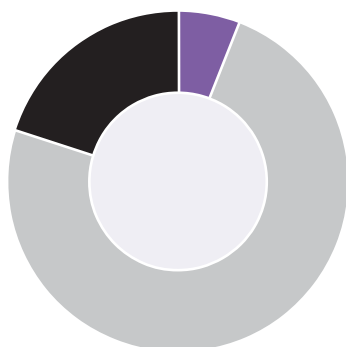
- 21%** I would not travel.
- 15%** Within a two-hour flight.
- 34%** Any distance necessary if the program was worth it.
- 22%** Within a four-hour drive.
- 8%** Within a five-hour flight.



Did the announcements of the approval of effective COVID-19 vaccines change your plans for 2021?

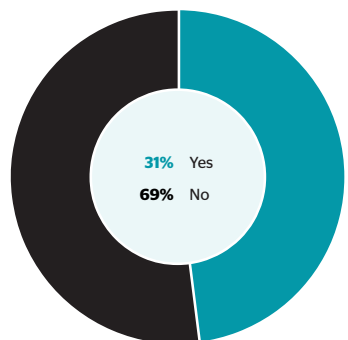


- 10%** Yes, I reserved space or initiated booking space as a result of the news.
- 66%** No action, but it changed my thinking about what might be possible.
- 24%** No, it did not change my plans for 2021.

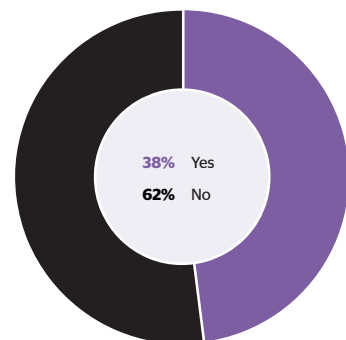


- 6%** Yes, I reserved space or initiated booking space as a result of the news.
- 74%** No action, but it changed my thinking about what might be possible.
- 20%** No, it did not change my plans for 2021.

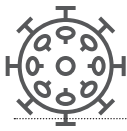
Once the vaccine is widely available, will you require attendees to show proof of vaccination in order to participate in your face-to-face event?



- 31%** Yes
- 69%** No



- 38%** Yes
- 62%** No



APR 23

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JUN 18

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NOV 19

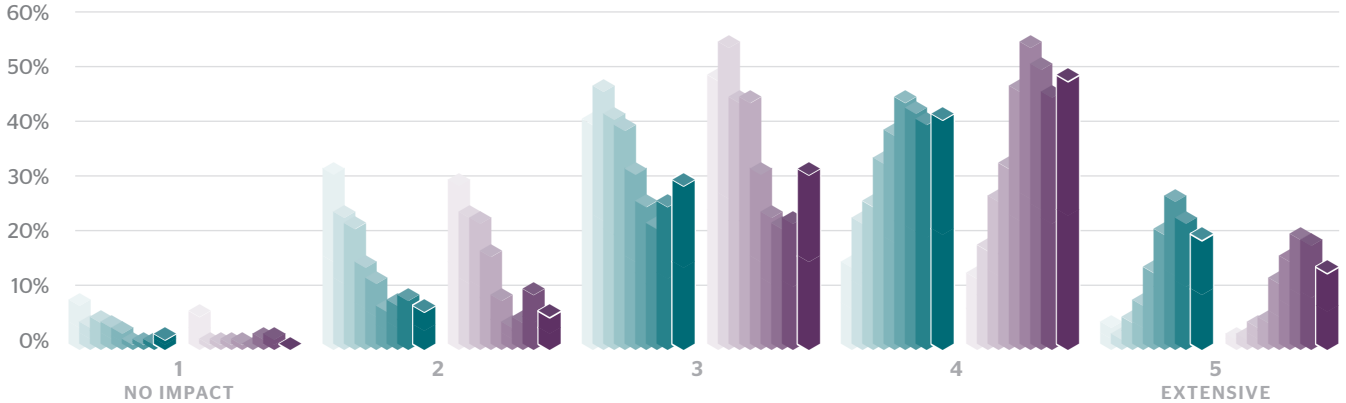
DEC 17

PLANNER TRACK

SUPPLIER TRACK

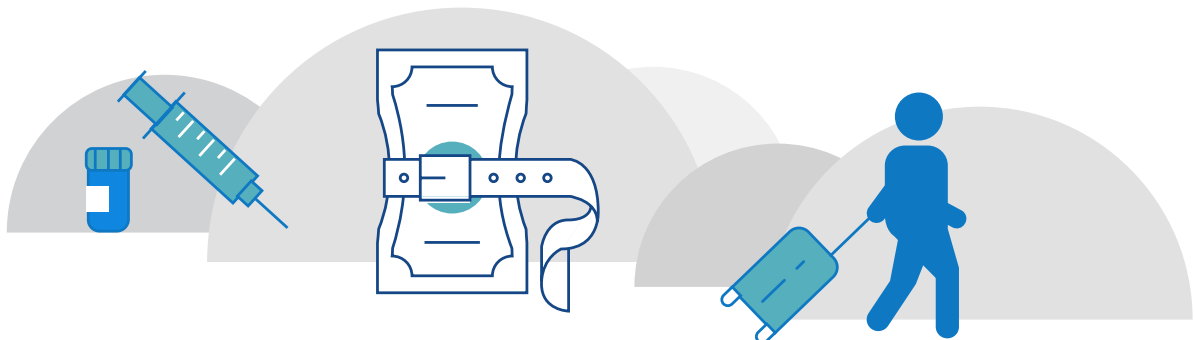
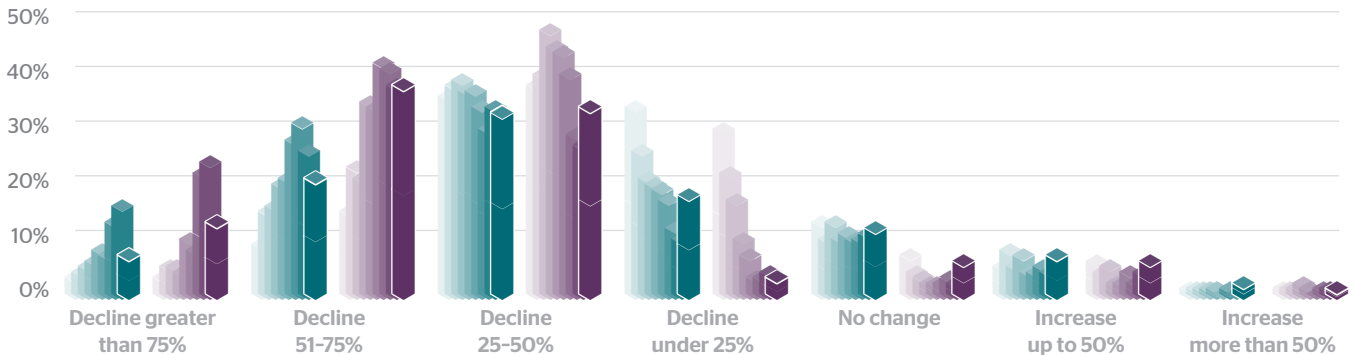
To what extent do you believe the rise in the use of digital-event technology will impact face-to-face event attendance at events **in 2021** on a scale of 1 to 5.

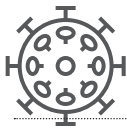
Weighted average for planners is **3.7** and suppliers is **3.7**



What do you believe will be the overall revenue impact of COVID-19 on your events-related business **for 2021**?

Weighted average for planners is a decline around **35%** and suppliers is a decline around **65%**

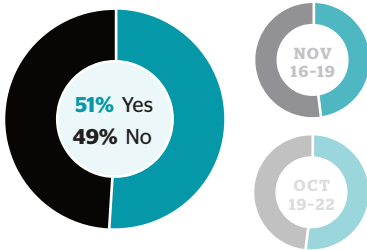




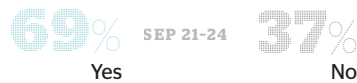
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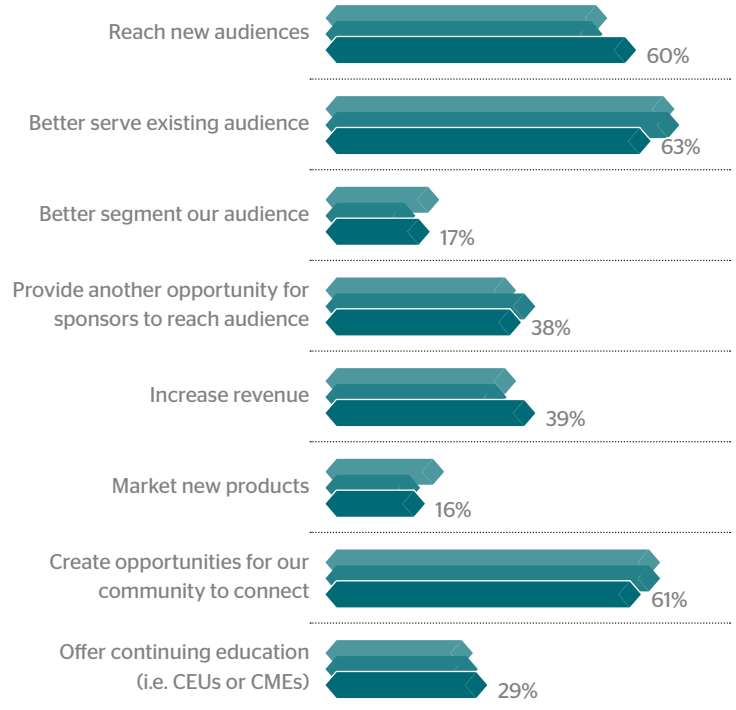
Are you planning to launch a new digital event that was not previously held face to face?



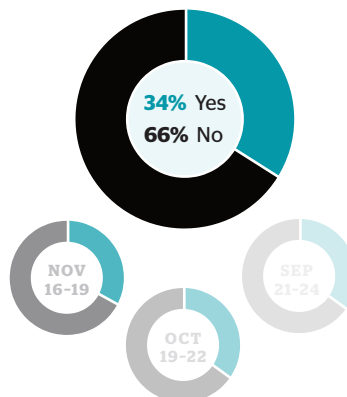
Are you satisfied with your tech solutions for your online events?



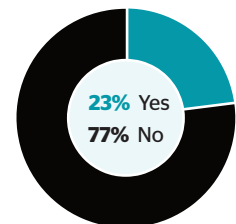
What are your goals for this new event?
(Choose all that apply)



Are you seeking out broadcasting facilities in your site-selection efforts for future hybrid events?



Assuming you're attracting a more global audience to your events, are you planning on offering translation services?



Most respondents said they use local translators or services like Interprefy, Wordly, and Rev. For others, translation is built into the platforms they use.

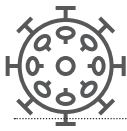
PLANNERS SPEAK

Planners who answered "no" said:

"I find I am having to use multiple platforms to meet education and engagement goals. It would be nice to have one solution we could afford."

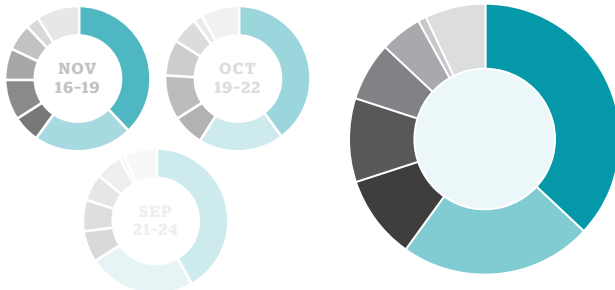
"A large portion of our events include trade shows, for which it has been very difficult to replicate a high ROI in virtual environments."

"Everything is antiquated, from the look and feel to lack of flexibility."



PLANNER TRACK

What is your biggest financial challenge with regard to planning a business event **in 2021**?
(Please choose one.)



- 37%** Budgeting/pricing for a hybrid (in-person + digital) events
- 23%** How to budget in terms of face-to-face attendance expectations
- 10%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 10%** What to charge digital participants
- 7%** What to charge digital event exhibitors/sponsors
- 6%** Expenses related to event marketing and communications in a post COVID-19 world
- 1%** Deciding on registration pricing for face-to-face participants
- 8%** Other

PLANNERS SPEAK

"I don't think PCMA has actually taught event planners about accessibility. It certainly isn't part of DES. And if it's not budgeted for either, the event takes a financial hit or the event is discriminatory against people with disabilities."

"Authorization to travel by stakeholders."

"What kind of room block and specs since face-to-face attendance numbers are unknown. With that said, I am not seeing enough flexibility and shared risk from suppliers to feel comfortable enough to book for 2021 Q4."

"How to budget in terms of F2F attendance, attrition, F and B penalties, and expenses related to enhanced hygiene/sanitary/health standards at a F2F Event."

"Knowing that our budget is significantly lower than ever before is a huge challenge. It does not give us enough to enhance the experience, or afford full safety precautions. We will be dependent on the hotels, airports, and ground transportation to be responsible for providing that for our attendees. Because of that, it doesn't give a full sense of security and reassurance for those who are thinking about attending our events, and doesn't give us planners the confidence to be able to confirm their safety in full."

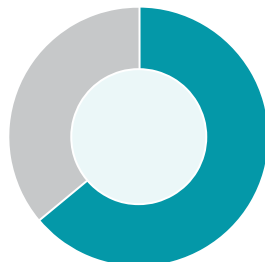
PLANNER TRACK

SUPPLIER TRACK

Have you attended a face-to-face event in the last few months requiring the use of PPE and other safety protocols? If you answered "yes," please choose the statement that best describes your experience.

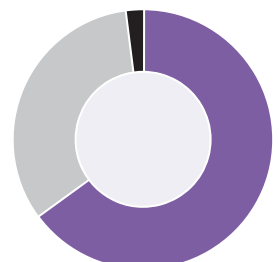
19% Yes

- 64%** It was worth all the precautions and safety measures – I would do it again.
- 36%** It was okay, but I don't see this as a viable option for most groups.
- 0%** Not at all enjoyable – I wouldn't do it again.



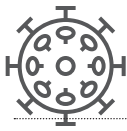
34% Yes

- 65%** It was worth all the precautions and safety measures – I would do it again.
- 33%** It was okay, but I don't see this as a viable option for most groups.
- 2%** Not at all enjoyable – I wouldn't do it again.



82% No

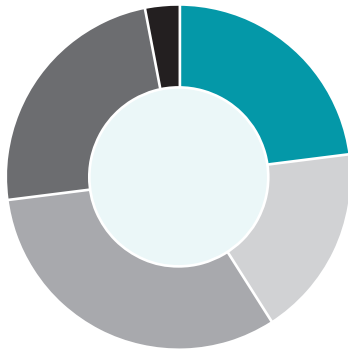
66% No



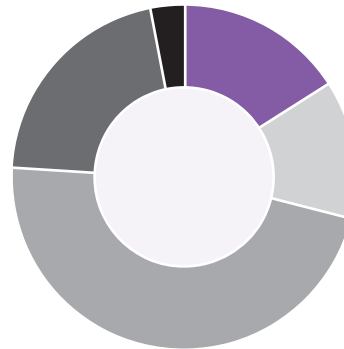
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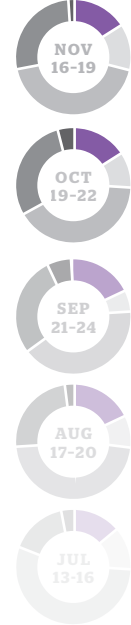
What scenario do you think best describes the recovery of face-to-face meetings for the business events industry in your geographic region?*



- 23%** There will be pent-up demand for all groups to meet face-to-face.
- 18%** People will be hesitant to travel to meet face-to-face.
- 32%** Smaller local and regional events will thrive before national and international groups gather.
- 24%** Small in-person events will be hybrid, with a digital version for a larger audience.
- 4%** Other



- 16%** There will be pent-up demand for all groups to meet face-to-face.
- 13%** People will be hesitant to travel to meet face-to-face.
- 47%** Smaller local and regional events will thrive before national and international groups gather.
- 21%** Small in-person events will be hybrid, with a digital version for a larger audience.
- 3%** Other



* In October, participants could choose more than one response.

PLANNERS SPEAK

"It is actually a combination of #1, 2, and 3, with people demanding live. But they will be hesitant to travel or cannot travel, therefore creating a smaller/regional event. Domino effect."

"In Boston, where the original superspreader event was hosted by Biogen, I have very little hope for in-person meetings throughout 2021."

"I think this changes as the world gets more comfortable with the health crisis. There is pent-up excitement to be together, but a lot of hesitation with current risk. I also believe that digital events are here to stay but so are F2F."

"I think the desire to meet and get back to in-person meetings is there, but we have seen a number of uncontrollable factors impact our decisions, such as corporate travel bans through July 1, 2021, and a lack of clearly defined quarantine rules when traveling and upon return."

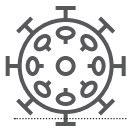
"Until full immunity across the board, in-person events will have difficulty attracting a live audience, people will remain cautious about visiting any live event, live venue, etc."

"I 100% agree that there will be pent-up demand but that doesn't change the reality of the situation. When every one of your stakeholders is on a travel restriction, pent-up demand doesn't really matter. I think smaller, local, and regional events will be common practice for 2021."

SUPPLIER PERSPECTIVE

"The incentive and reward side of the business will boom."

"There will be larger meetings, but at least 50 percent will be virtual attendees. Organizations have learned and accepted a new way of getting higher attendance at lower costs. Not everyone needs to be physically present."



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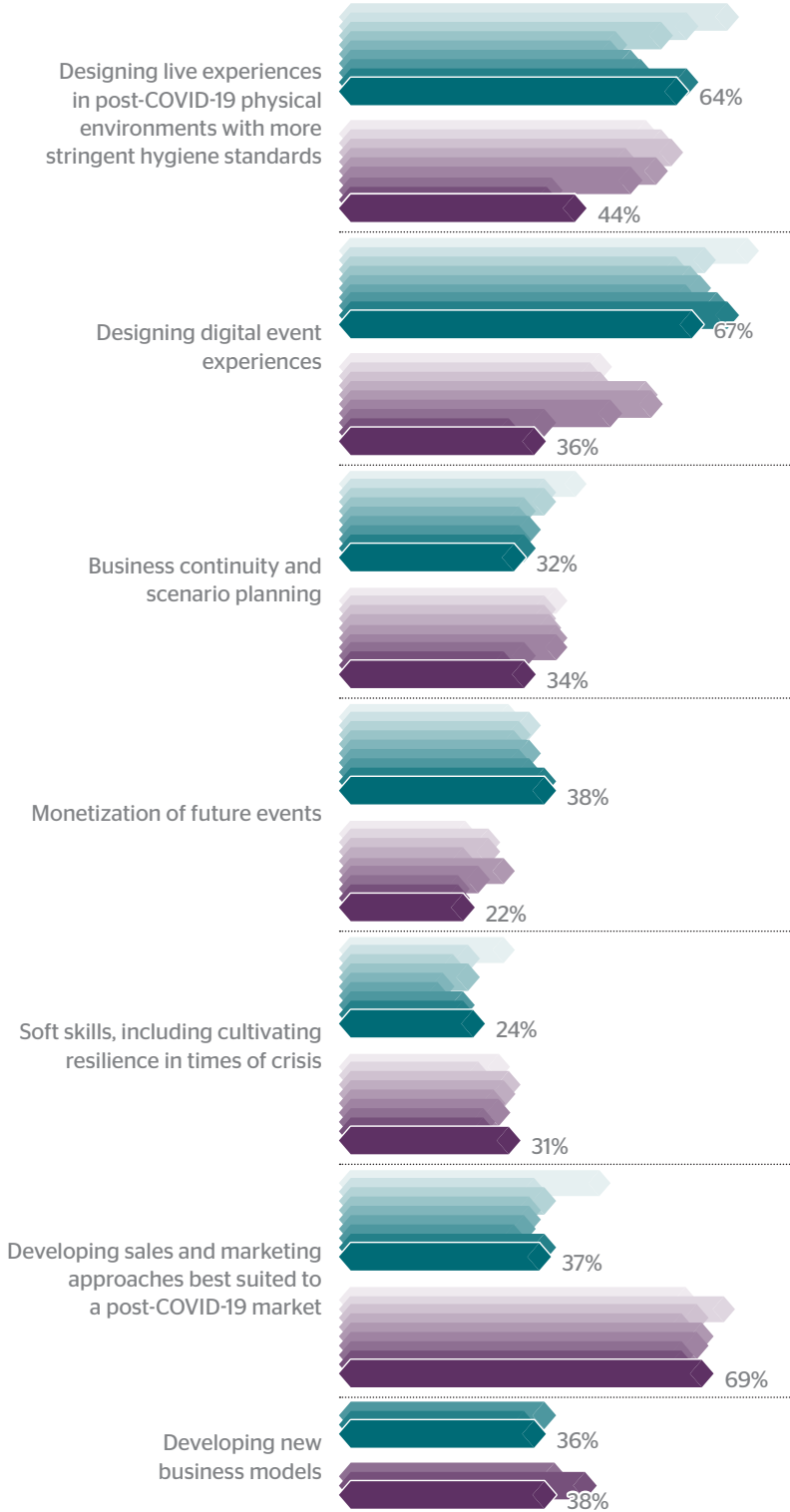
NOV 19

DEC 17

PLANNER TRACK

SUPPLIER TRACK

In order to prepare professionally for success in the business events industry during the recovery, which new skills do you think you need to pursue/develop? (Choose all that apply.)



PLANNERS SPEAK

“Community building. What we’ve all seen over the course of this year is that people are most important in our lives, and businesses need to find a way to help people create meaningful connections between people at their events.”

“Digital is here to stay. How it impacts live events remains to be seen, so a lot of scenario planning needs to be done. We’re never going back to where we came from and there are going to be winners and losers.”

“Hybrid events: How will we afford and manage events that offer both virtual and live components from technology to registration and budgeting?”

“Developing skills outside the industry.”

SUPPLIER PERSPECTIVE

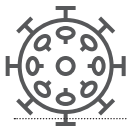
“Rehiring top professionals.”

“I’m a magician switching to keynote speaking. I love live but it feels like I must do virtual to get by.”

“Make digital events more exciting and personalized.”

“Career change. As a conference photographer, I feel there is no real future in live events large scale. And if it does trickle back, there will be saturation of professionals like me to the degree it won’t be a viable career anymore.”

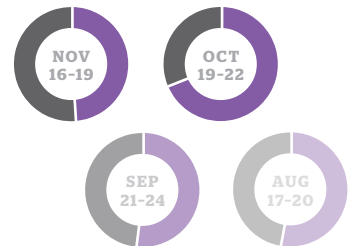
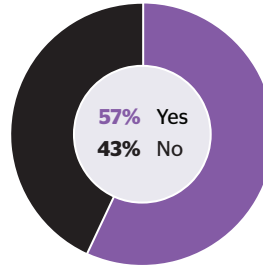
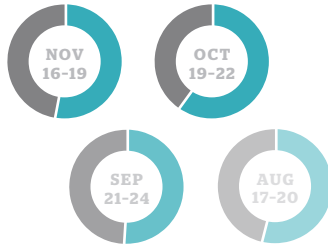
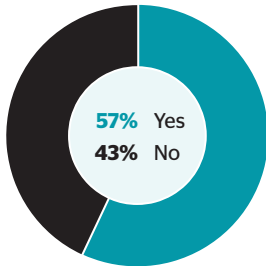
“Preparing employees for real-life endurances.”



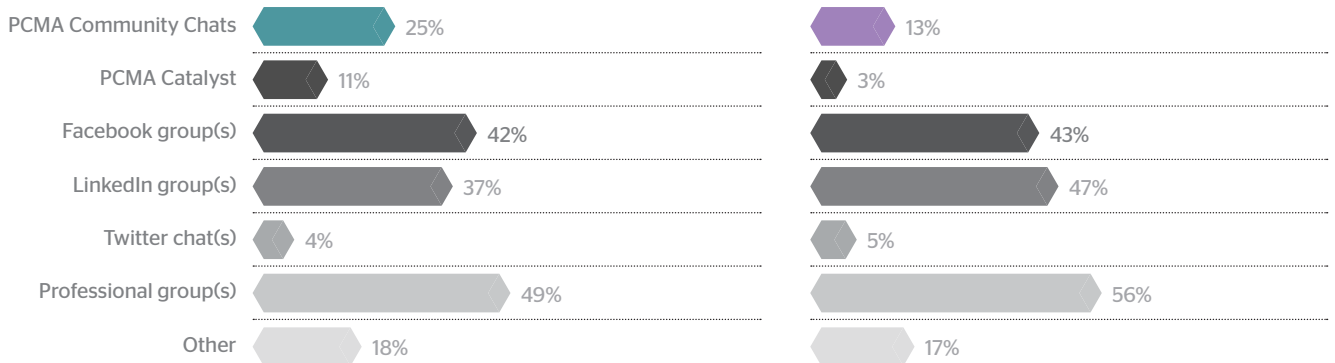
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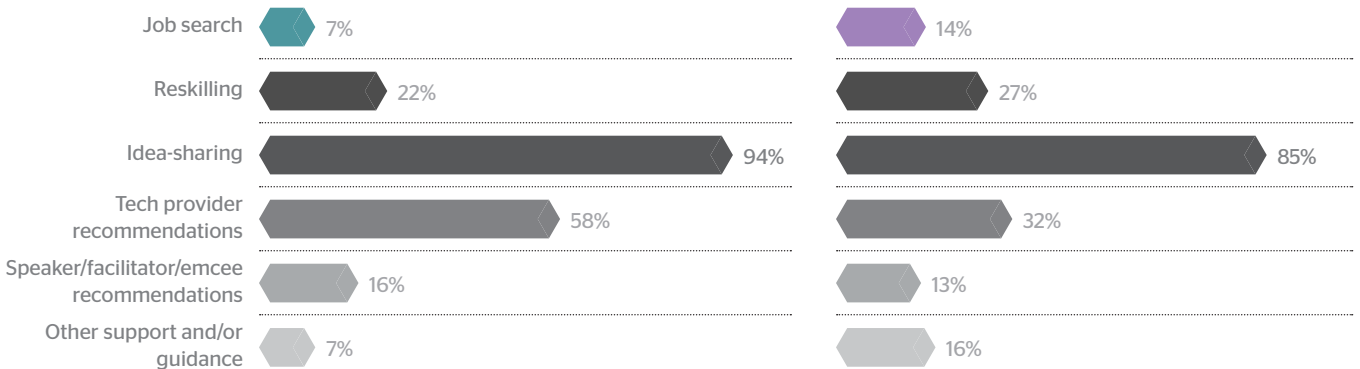
Have you joined any online community groups to help you navigate the crisis?



On what channel or platform does the community group you participate in meet? (Choose all that apply.)



In what areas are you looking for help from the community group? (Choose all that apply.)



PLANNERS SPEAK

"Best practices. Pearls and pitfalls."

"Learning from others on what they are doing to retool meetings in a hybrid way."

SUPPLIER PERSPECTIVE

"Good to check in with others in different areas of the country/ globally to get a pulse of what is going on. Sanity checks!"

"Not going bankrupt."