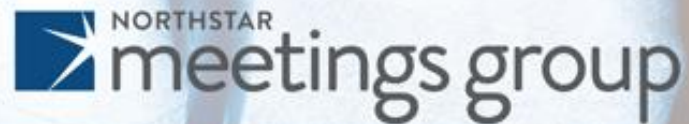


PULSE SURVEY

THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19

January 20, 2021



EXECUTIVE SUMMARY

A new year brings new hopes — and new worries — to meeting and event professionals. Most expect the rollout of vaccines to accelerate our industry's recovery. However, very few are focused on booking in-person events at present, per Northstar Meetings Group's latest PULSE Survey, released today.

Given the events of Jan. 6 in the nation's capital, there's more concern about civil unrest affecting meetings. Interestingly, when in-person events resume, only two out of three of this month's 812 survey respondents plan to require masks or other safety protocols.

Northstar's PULSE Survey, launched in March 2020, captures evolving planner sentiment as our industry responds to challenges brought on by the global pandemic.

Following are more takeaways:

Not-So-Great Expectations

The year is off to a slow start for in-person events — much slower than planners expected in mid-2020. Just 10 percent plan to meet in Q1 2021, a steep decline from our June 2020 PULSE Survey, which showed nearly 40 percent of respondents expected their face-to-face meetings to resume this quarter. More than half (56 percent) are now aiming for the second half of the year.

The majority (36 percent) of planners are still focused on rescheduling and rebooking events. New bookings remain scarce; in fact, nearly 30 percent report they are not actively working on live events. However, findings show a slight uptick, from 10 to 12 percent, in those for whom sourcing and issuing RFPs is a top priority.

Should We Have Hope?

Three out of four planners see the rollout of vaccines as a major turning point for our industry's recovery. Just 10 percent disagree, and the rest are undecided.

Hopes are dimmer regarding the latest federal stimulus package. Only 22 percent think those funds speed economic recovery for our industry; the rest say it won't make a difference (31 percent) or they're unsure (47 percent).

Heightened Worries

It's no surprise that PULSE Survey respondents' myriad concerns remain high, especially fear of contagion, travel budget constraints and meeting budget constraints, but all of these fears have abated somewhat. New and rising concerns cited by planners in the latest survey include geopolitical issues, civil unrest and crime.

The attack at the Capitol on Jan. 6, the same day this survey opened, clearly influenced responses. For the first time since the PULSE Survey launched last March, a number of planners provided unsolicited comments about how civil unrest might impact their events. "I'm worried that people will be wary of in-person gatherings of any size for a very long time, both due to Covid and civil unrest," wrote one respondent.

Another noted: "Covid is only one issue we are dealing with right now. The potential of violence or disruption from radicalized groups is quickly becoming every bit as significant and has the potential to further harm the meetings industry."

Safety First? Maybe Not

When they do hold in-person events, only 66 percent of planners say they'll require masks and adherence to health-safety protocols. While some might be rejecting the science, others are likely delaying their meetings until the threat of contagion has eased. One planner, in a verbatim comment, opined that Covid-19 will be "behind us" by Q3 2021.

Among those taking more cautious measures, 22 percent will require proof of a recent negative test, and 21 percent will request proof of vaccination. These findings suggest that if vaccine efficacy and distribution don't meet expectations, event planners will need some inspiration to reconsider testing as a viable and perhaps necessary option to support safe meetings.

Verbatim comments reveal widely differing opinions on the need for safety protocols, ranging from "We will have none, or whatever the crazy local governing 'elected' officials decide is 'safe' — ridiculous!" to "We will not meet in person until these measures are not needed."

Hybrid Is on the Horizon

While only 21 percent of respondents are currently planning hybrid events, another 52 percent intend to or are considering holding events with both live and virtual audiences. Just one in four aren't weighing this option.

Meanwhile, confidence in the effectiveness of virtual meetings has declined by 5 percent month over month. On a scale of one to five, with five as the highest level of confidence, the average index stands at 2.81.

We'll Stay Home

Fewer planners will attend in-person meetings themselves over the next three months. In fact, 76 percent will decline such opportunities, up from 71 percent in November. But most planners still think meetings industry organizations should meet if safety protocols are followed and enforced.

Nearly one in three say definitively that we should not be holding in-person events. One respondent commented: "If the industry cannot see the data, the damage and the death before us, how can they be trusted partners?"

PULSE SURVEY

**NEW
DATA**

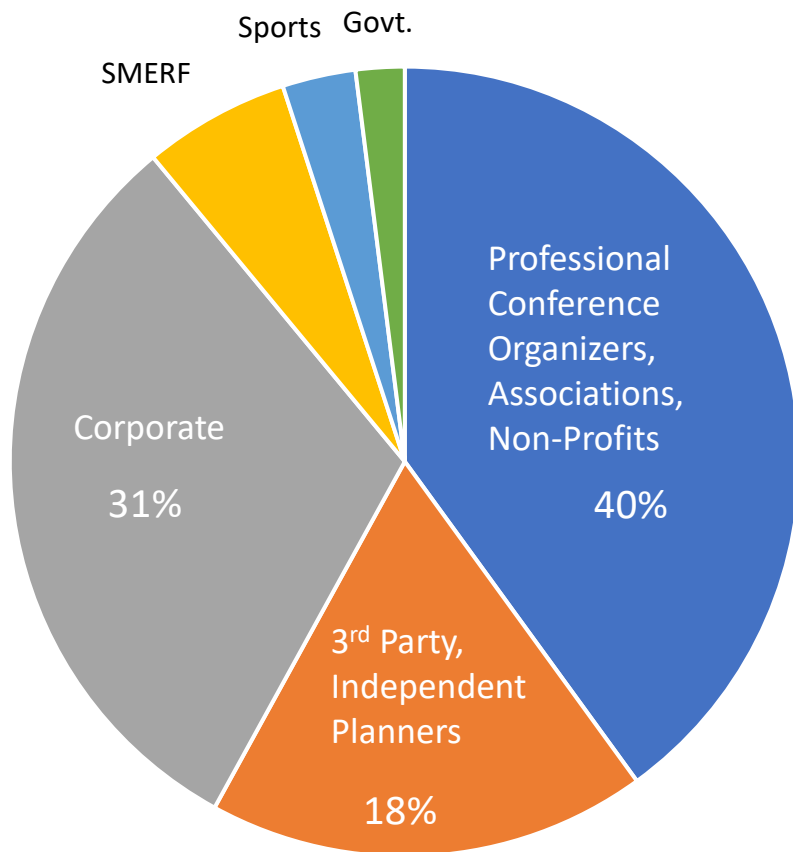
THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19

JANUARY 20, 2021

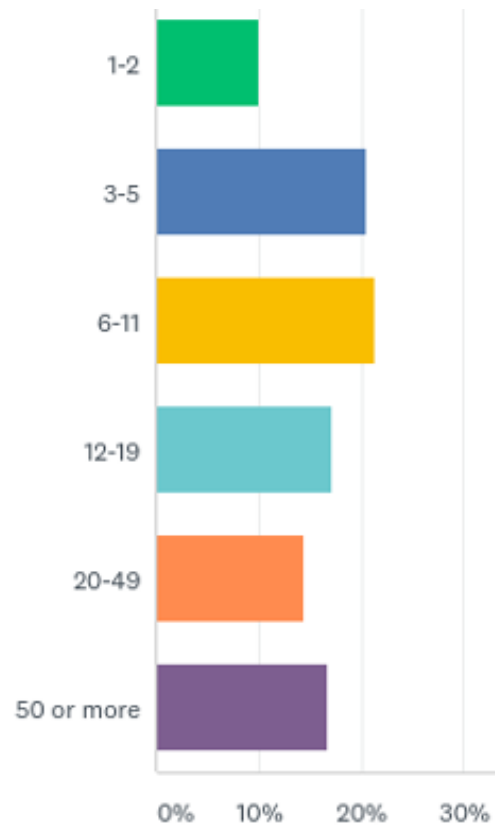
 **NORTHSTAR**
meetings group

Respondents By Type, Volume and Size

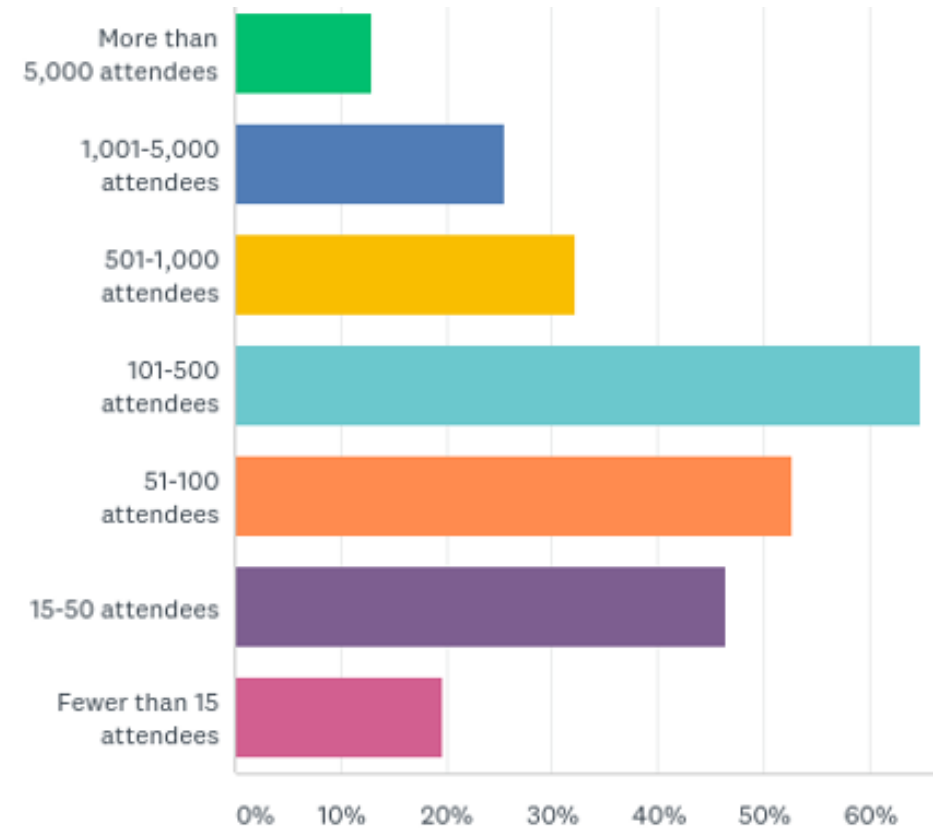
812 Valid Planner Responses



Type



of Meetings



Size of Meeting

New Bookings Remain at Low Levels

Though the new year brings a slight uptick in sourcing and researching

Over 36% are still spending most of their time rescheduling events.

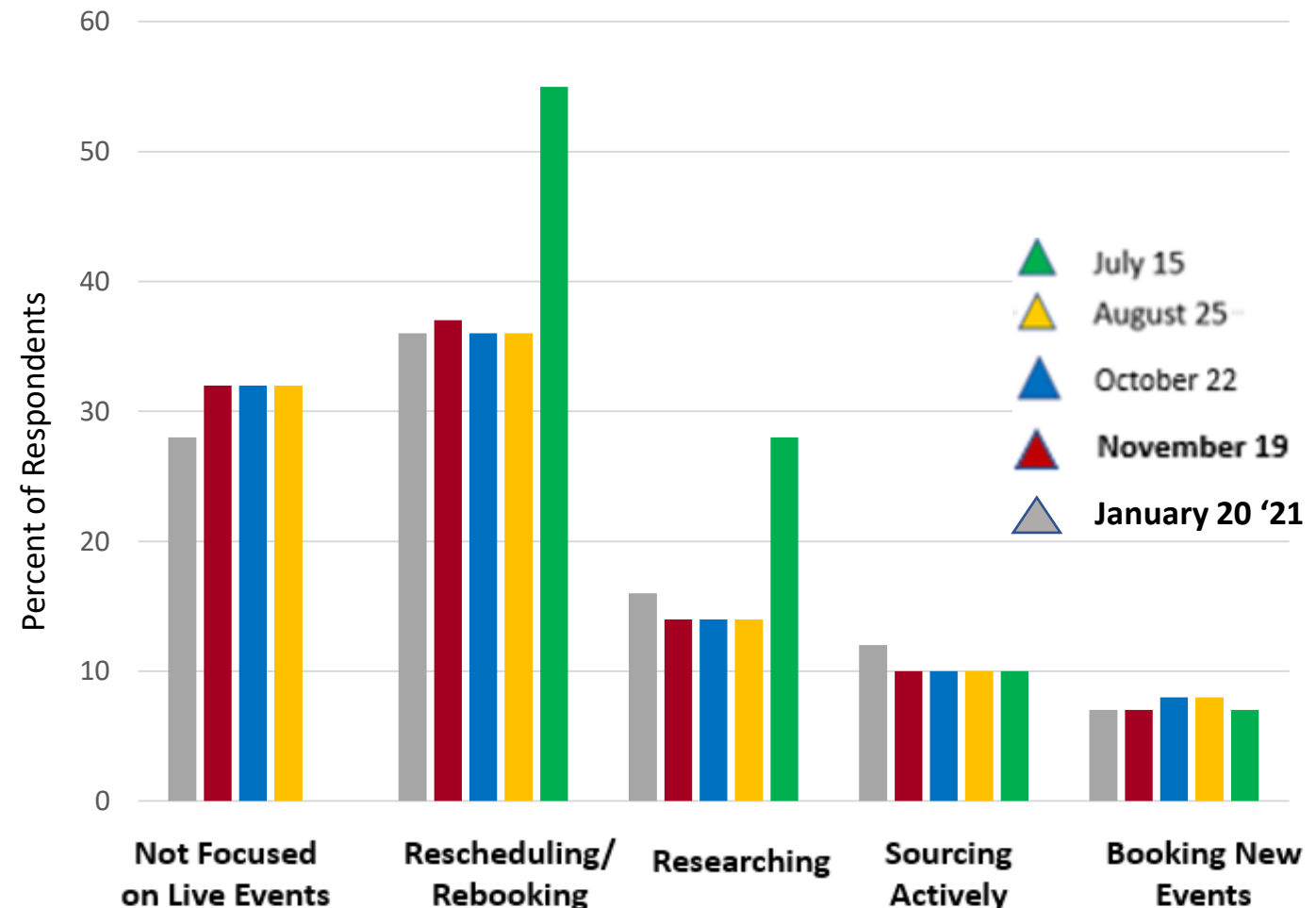
What is your current primary focus as it pertains to your live, in-person events?

Responses as of January 20, 2021

ANSWER CHOICES

▼ I am rescheduling or rebooking events.	36.46%
▼ I am researching potential new events, but not ready to issue an RFP or lead.	15.82%
▼ I am actively sourcing (issuing RFPs or leads) for new events.	12.06%
▼ I am booking new events.	7.37%
▼ I am not currently focused on live, in-person events.	28.28%

RESPONSES



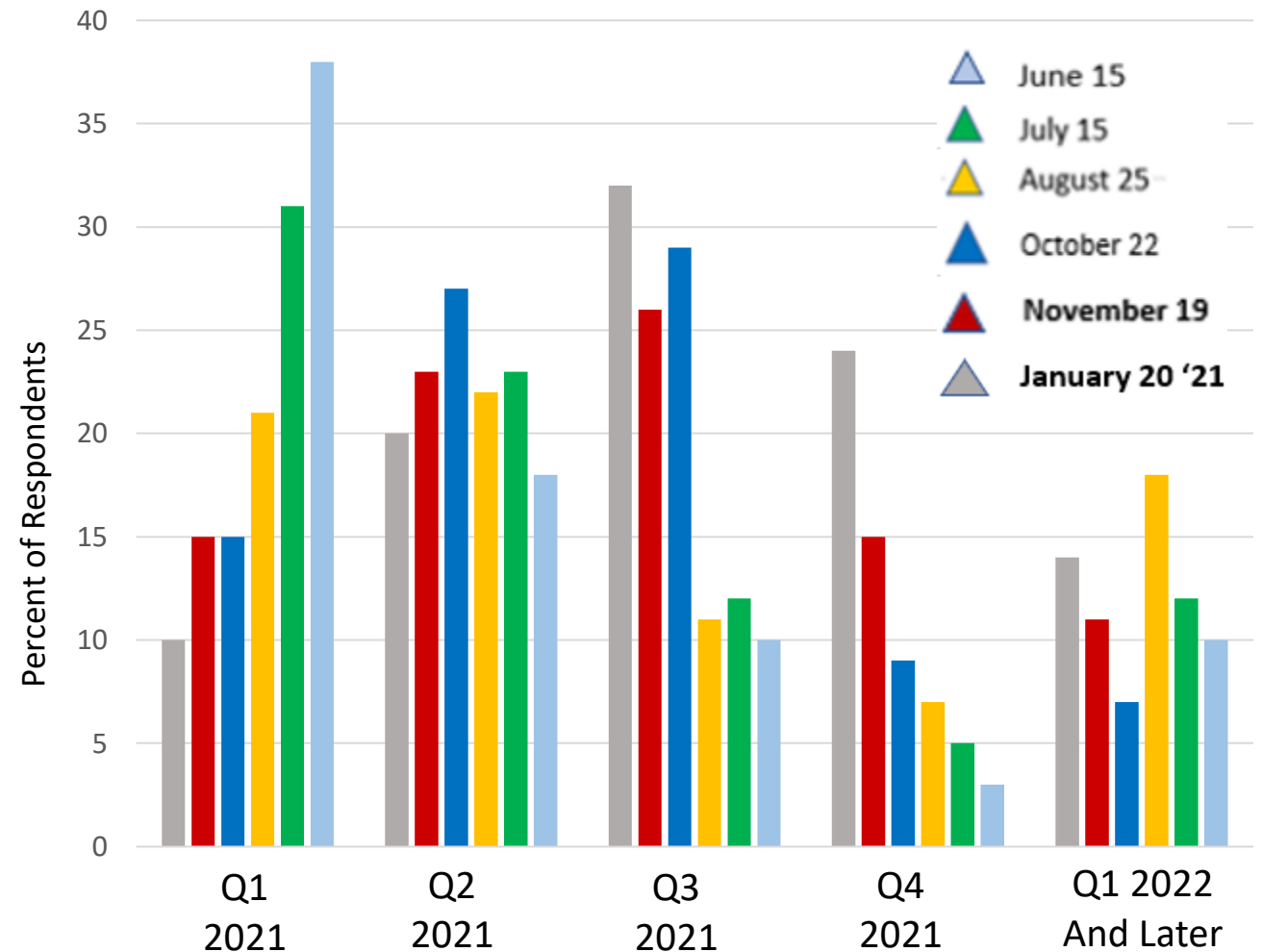
When's Your Next Live Event?

Q4 sees biggest increase, while less than 30% are still planning for first half '21

When at the earliest do you expect to hold your next in-person or hybrid meeting or event?

Responses as of January 20, 2021

ANSWER CHOICES	RESPONSES
▼ Q1 2021	9.82%
▼ Q2 2021	19.51%
▼ Q3 2021	32.20%
▼ Q4 2021	24.15%
▼ 2022 or later	14.32%

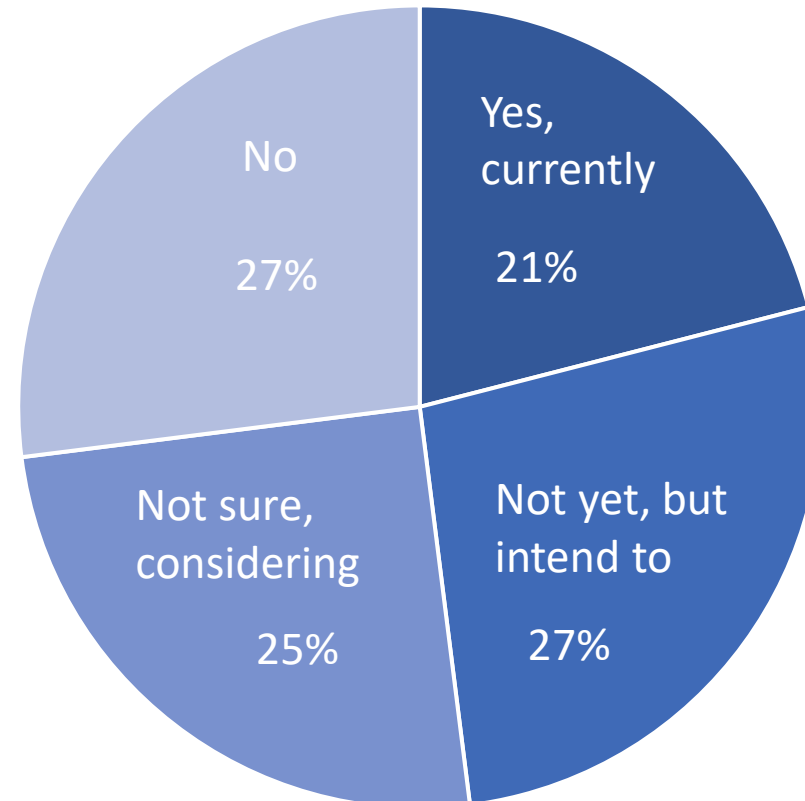


Hybrid Model – Hope or Hype?

Only a minority of planners are currently going “hybrid”



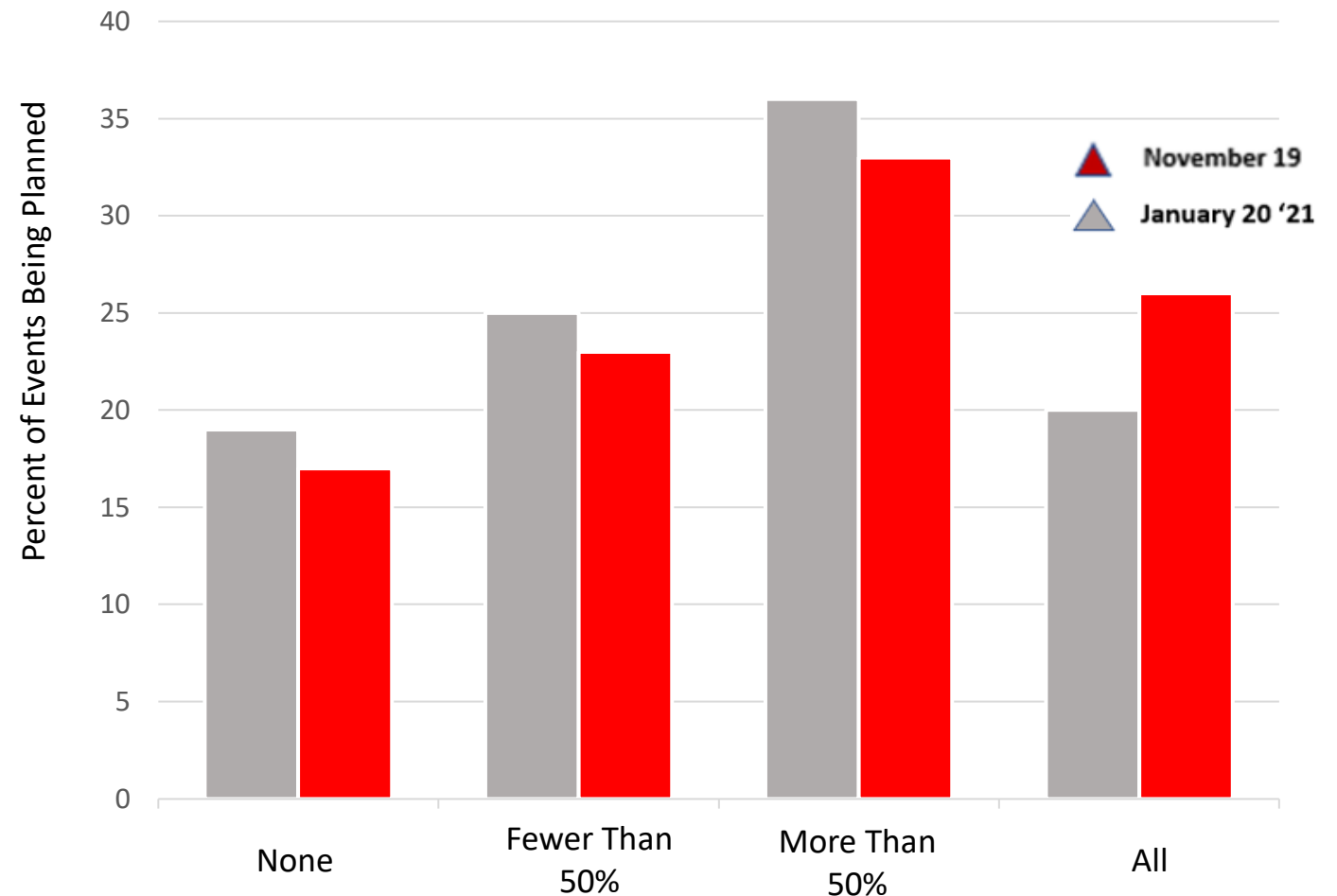
Are you currently planning hybrid events
(with both in-person and virtual audiences)?



What percentage of the events you are now planning will be online only?



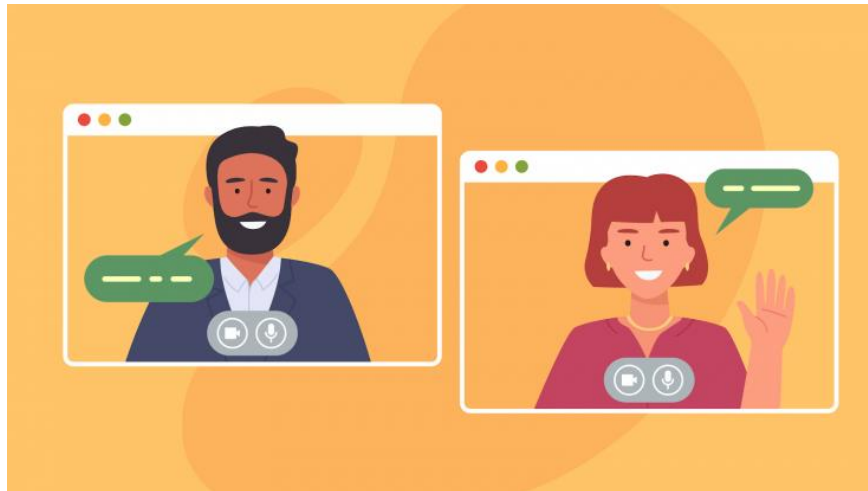
Fewer “all” more “none” --
with everything in between



Virtual Event Confidence Index Declines

Since October, planners' expectations for the success of their virtual events falls 10%, reflecting steady, month over month declines since the pivot to virtual months ago.

How successful will virtual events be for your constituents?
(with 1 = not at all confident; 5 = highly confident)



October

3.13

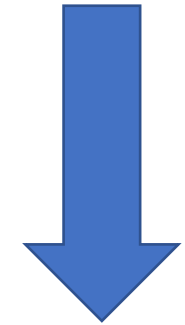
November

2.98

January

2.81

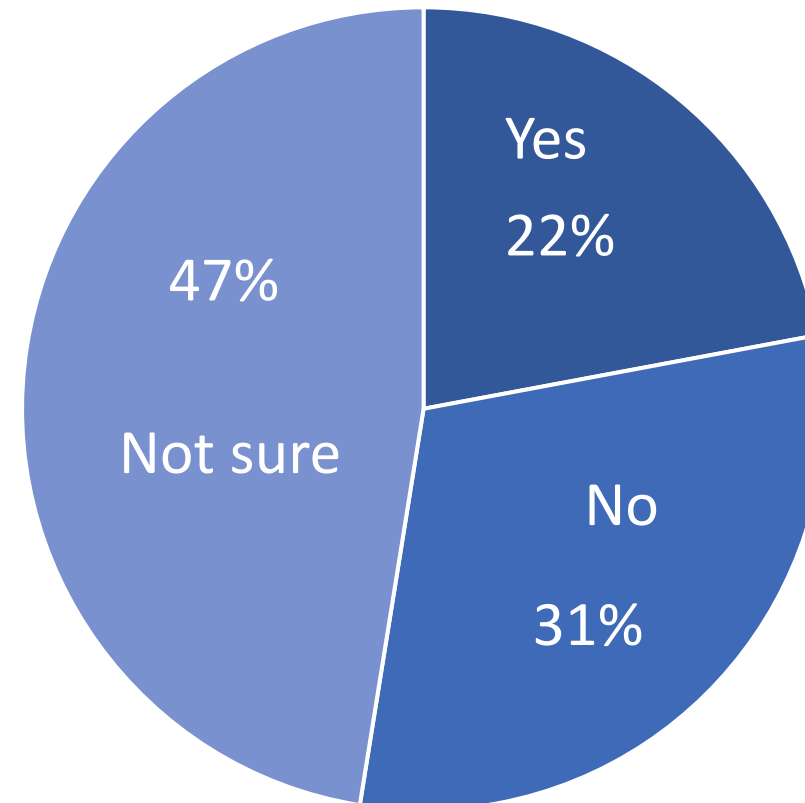
Out of 5



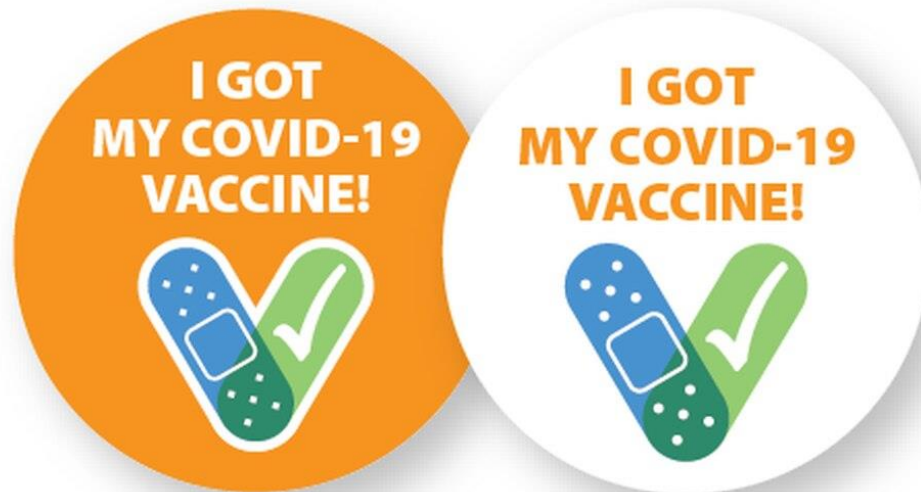
The stimulus package? No big deal for planners



Do you believe the recent passage in the U.S. of a \$900 billion stimulus package will lead to a quicker economic recovery for our industry?

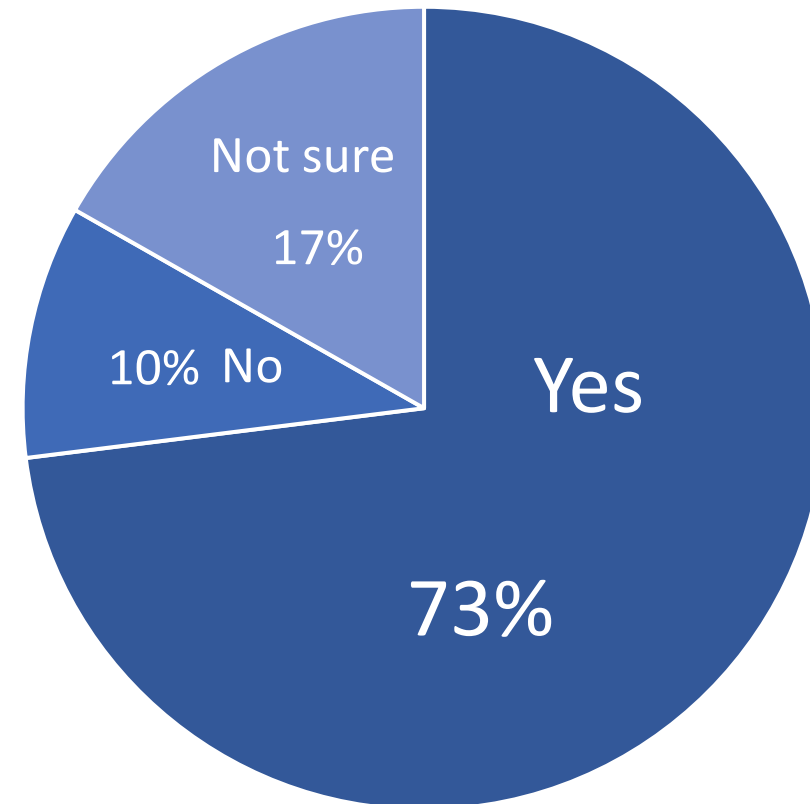


**Thank goodness
for vaccines.**



**Where would planner confidence
be without them?**

**Do you believe the rollout of Covid-19
vaccines will lead to a quicker economic
recovery for our industry?**

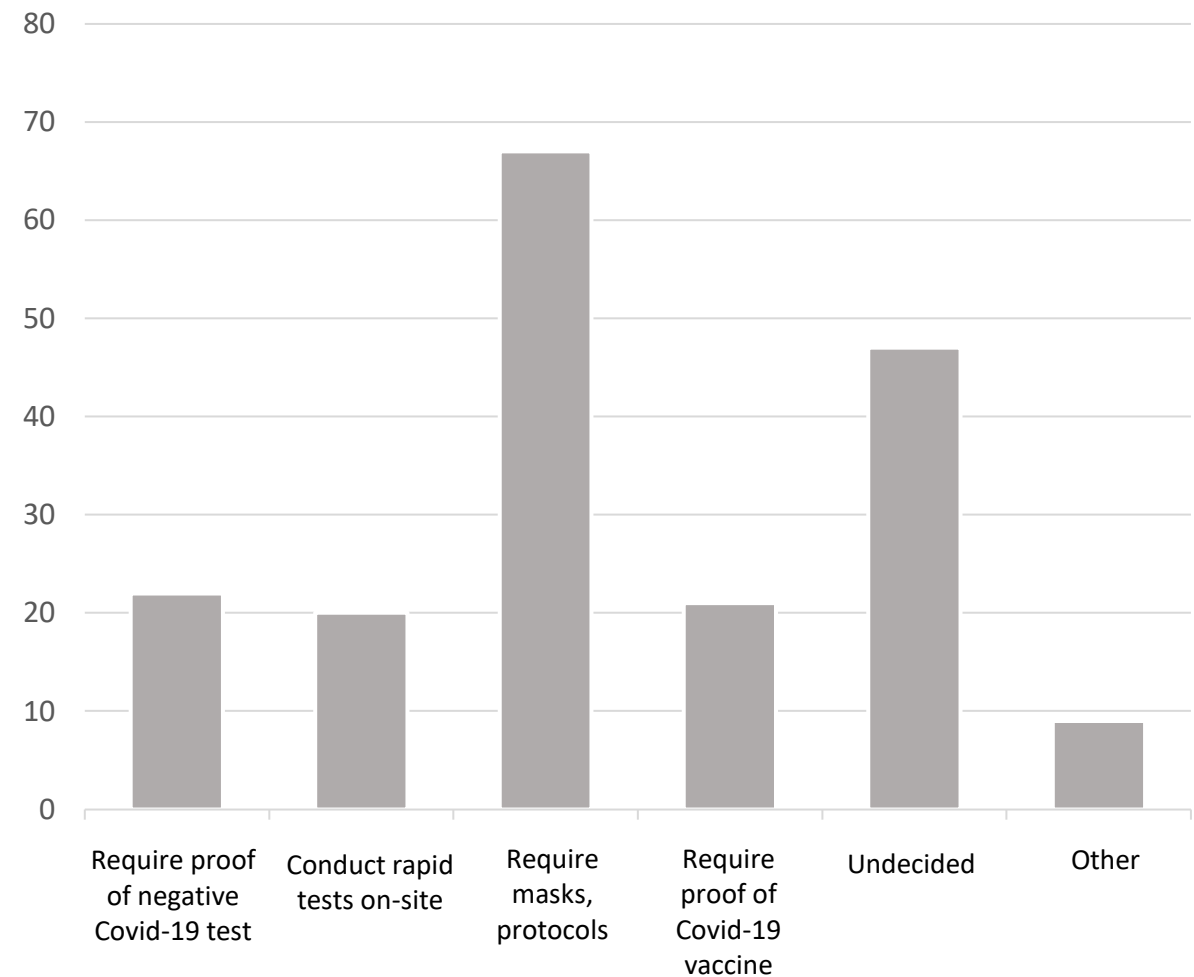


Planners divided, uncertain on safety measures.

**SAFETY
MATTERS**

One in three planners will not require masks
and adherence to protocols.

Which of the following measures do you expect to
enact at your next in-person event?



Which measures do you expect to enact?

Sample “Other” Verbatim Comments:



Should meetings industry organizations or related businesses be holding in-person meetings?

“Each organization has protocols to be followed as directed by their risk management teams. Not all are the same. We make recommendations that will best ensure the safety and well-being of each participant and stay informed of the ever-changing landscape of what is required for safe and seamless travel.”

“Since our next event is in November 2022, none of this should matter. Which is why our next event is in November 2022. We will not meet in-person until these measures are unnecessary.”

“We are legally reviewing ‘proof of vaccine’ requirements now.”

“We will not go beyond the legal requirements of the destination.”

“Events will have to follow whatever requirements are in place at the time of the event. I expect that by Q3 ‘21 masks and social distancing will long be forgotten.”

“We will meet all CDC requirements and recommended practices.”

Fewer Planners Will Attend In-Person Gatherings Over the Next 3 Months

Do you plan to attend any in-person meetings or business events over the next three months?

As of January 20, 2021

76% Say “No”



As of November 19, 2020

In response to the same question last year,

71% Said “No”

Although They Say If We Can Meet, We Should



Absolutely; we need to get back to business

12.30%

Yes, if all restrictions and protocols are followed and enforced

50.82%

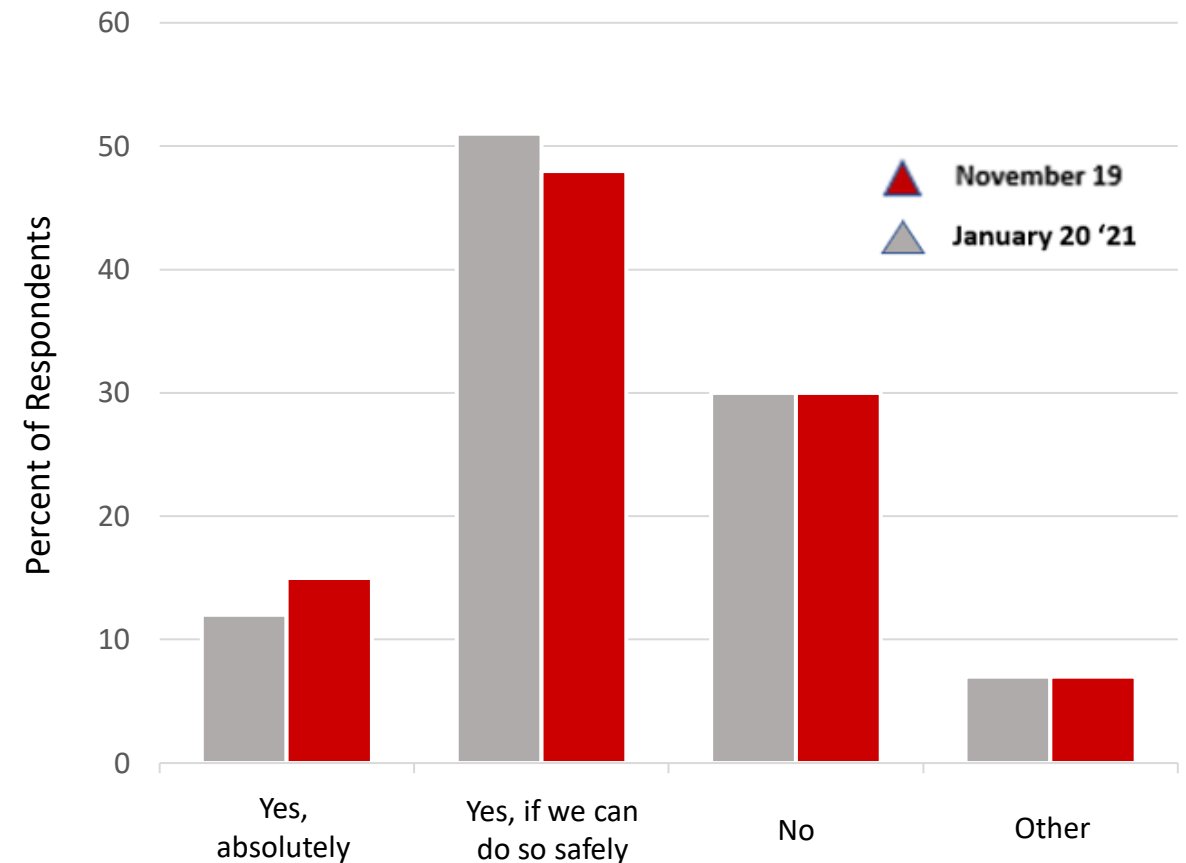
No

30.33%

Other (please specify)

6.56%

Should meetings industry organizations or related businesses be holding in-person meetings?



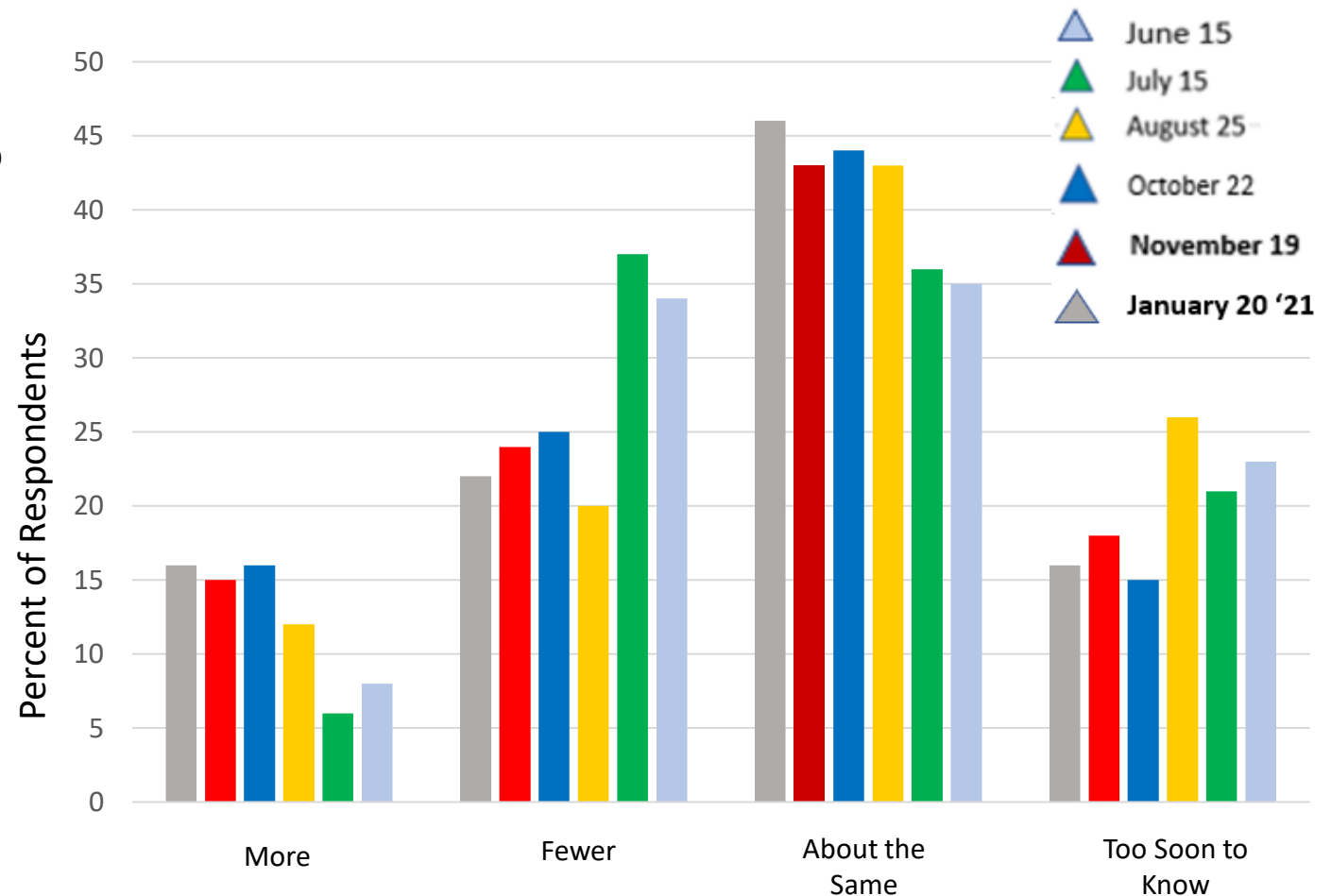
More Planners Expect the Same Number of Meetings

And the gap closes between “fewer” and “more” – reflecting a skew to the positive

When in-person gatherings are no longer restricted, do you expect more or fewer in-person or hybrid meetings than before Covid-19?

January 20 Responses

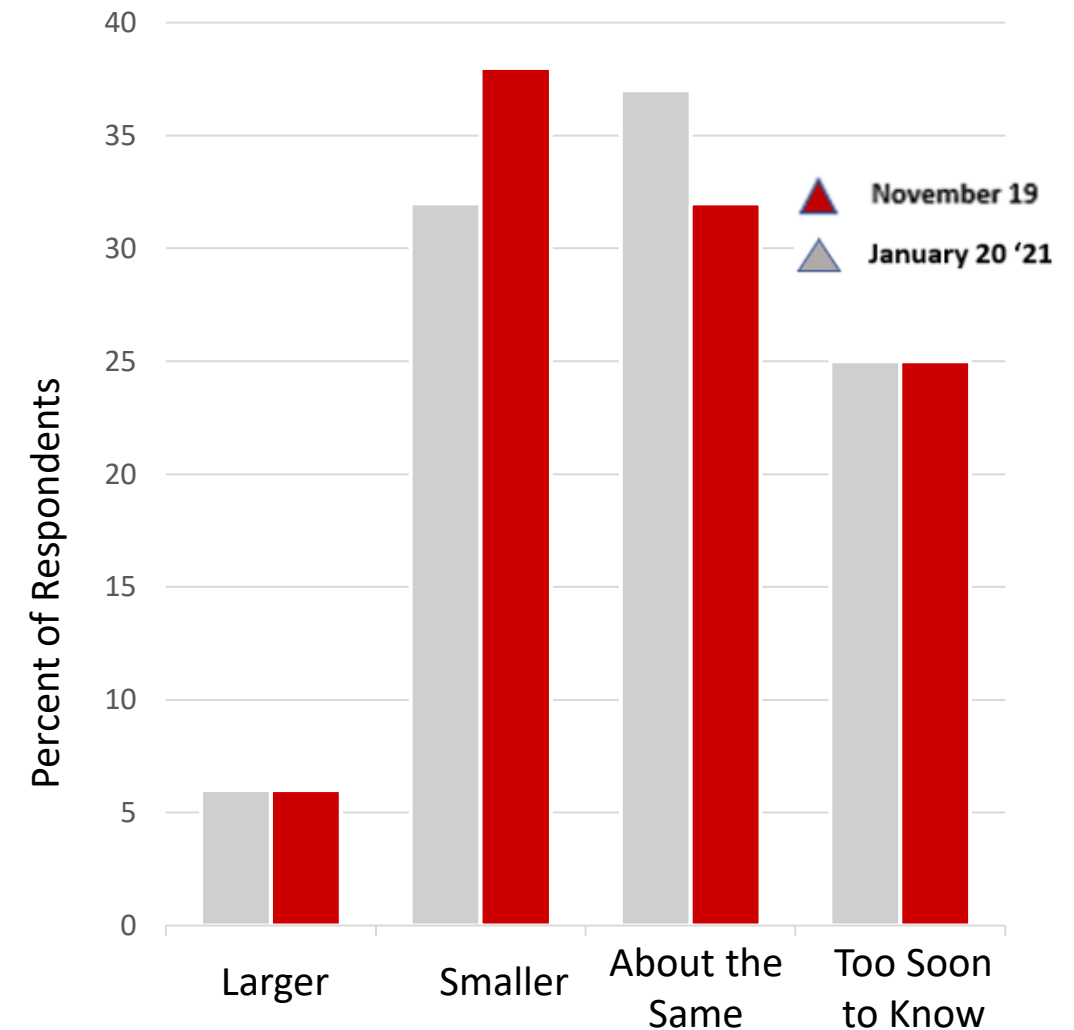
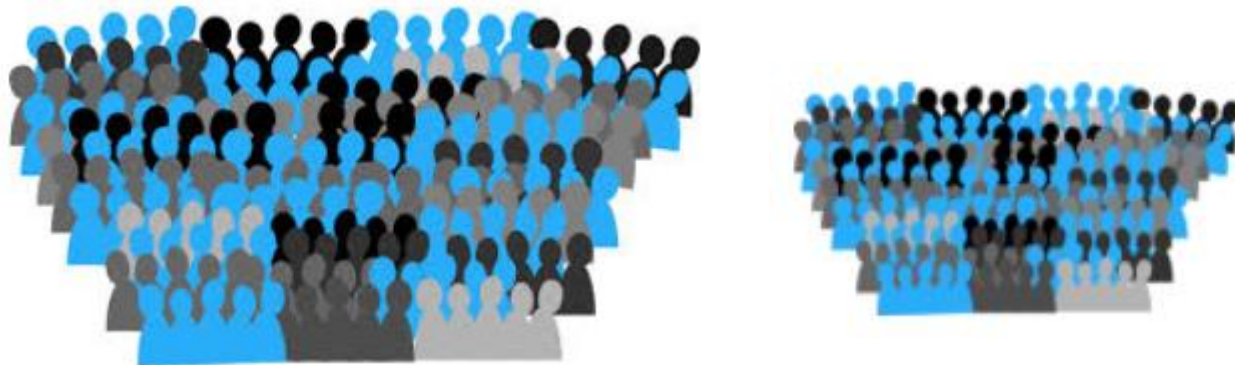
More	15.60%
Fewer	22.16%
About the same	46.37%
It's too soon to know.	15.87%



Trend to Smaller Events Begins to Subside

Since November, planners who thought their events would be smaller are now thinking they'll be "about the same"

When in-person gatherings are no longer restricted, will the size of your live audiences be larger or smaller than before Covid-19?



Geopolitics, Civil Unrest, Crime Grow as Concerns

For your future in-person or hybrid events, how concerned are you about the following? Rate each on a scale of 1 to 5 (with 1 being “not at all concerned” and 5 being “extremely concerned”)

Continued fear of travel extending over long-term

Continued fear of contagion from Covid-19

Impact of crisis on airline service, routes, pricing, etc.

Hotel staffing reductions/hotel closures

Impact of virtual events on demand for physical events

Constraints on business travel budgets

Constraints on meetings budgets

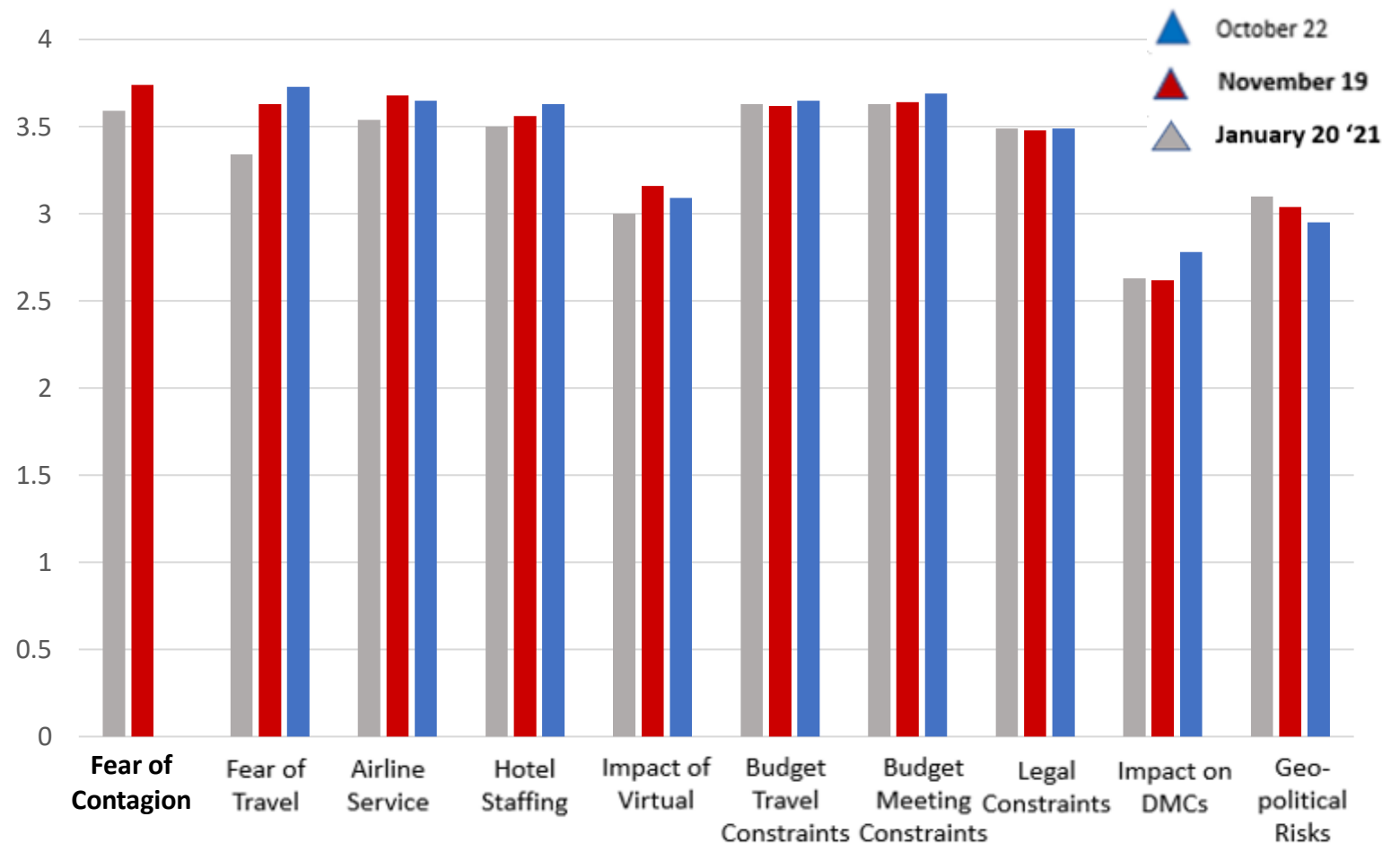
Inflexible legal/financial contractual terms

Loss of destination marketing companies to support programs

Risks associated with geopolitics, civil unrest, crime, immigration, trade, etc.

Weighted Average

Travel, Meetings Budgets Remain Top Concerns, Among Many



In Summary:

- ✓ More than one in three planners are [rescheduling their events](#), still!
- ✓ Nearly 30% of all planners [report they are not focused on live events](#), although there's a slight uptick in sourcing and researching activity.
- ✓ Q3 '21 is when most think their events will [be back in business](#), but Q4 sees the biggest uptick since the last survey.
- ✓ Planners are [underwhelmed](#) by the stimulus package, but where would we be without [vaccines](#)?
- ✓ Confidence in the success of virtual events [continues to wane](#), down another 5%.
- ✓ [Hybrid](#) is an option for some, but not for others.
- ✓ Is it a surprise that only 2 out of 3 planners [will require masks and protocols](#)?

Selected Verbatim Comments:

- "I'm worried that people will be wary of in-person gatherings of any size for a very long time, both due to Covid and civil unrest."
- "The lack of a coordinated rollout of the vaccine will push the timeline for in-person meetings. Plus, our members are being hit hard financially and may not be able to spend money on travel and event registrations as freely as before. Also, public perception of safety could hinder holding in-person events for a while, especially since it has been proven over the past year that virtual events (although not the same as in-person) can provide content."
- "Working in education, our biggest concern isn't that there won't be demand, but that there may not be the budget. However, we have found a new audience in attendees that now attend our events because travel isn't required. We're likely to continue offering virtual events in the future, or we'll look more closely at taking our events "on the road" outside of our usual geographic areas to service those needs in person."
- "We are still having in-person sporting events with limited spectators. Mask and social distancing are required following state guidelines. Our staff still struggles with the fear of exposure while working these events. The struggle is real."
- "Covid is only one issue we are dealing with right now. The potential of violence or disruption from radicalized groups is quickly becoming every bit as significant and has the potential to further harm the meetings industry."