



PULSE SURVEY

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

April 21, 2020



EXECUTIVE SUMMARY

The worldwide pandemic has been particularly harsh for the meetings industry, but a deep dive into planners' individual experiences and expectations reveals that a majority are working on future business and anticipating fundamental changes, according to Northstar Meetings Group's PULSE Survey, conducted from April 14 to April 21, 2020.

"The future of events is changing, and we can shape it but we don't have much control over it at the moment," commented one respondent. At the same time, planners are looking ahead and preparing for significant changes in the post-COVID-19 meetings world.

These insights are based on 1,045 meeting planner respondents from across the globe, with about three-quarters located in the United States. Survey participants represent a wide range of industry segments, including association and convention planners (one-third), third parties (26 percent) and corporate planners (19 percent).

Planners Are Still Working

Regardless of location, size and type of meeting or event, meeting planners' experiences are remarkably similar. First, the majority have held onto their jobs, with 83 percent still working full time. Fourteen percent have been furloughed, either full- or part-time. Just three respondents are out of work and don't plan to stay in the meetings industry, while another 23 who have lost their jobs are hoping to find new employment in meetings and events.

Meanwhile, the business of meeting planning has not stopped: Forty percent of those working are currently sourcing and booking events, and 36 percent are researching for future events but not yet booking at this time.

For many, this is a tough time to do business, the survey confirms. Twelve percent are finding it "very difficult" to work with meeting suppliers, and another 47 percent report "it's been more difficult than usual." This finding is consistent across geographies.

Getting Back to Business

Planners in the U.S. are slightly more optimistic about meetings returning as early as this summer than those in other regions. Eighteen percent are holding steady to rescheduled dates for events that will take place prior to September, while somewhat fewer share that expectation in Canada (14 percent), U.K./Europe (12 percent) and Asia (13 percent).

At the same time, respondents predict a downward trend in the number and size of events they will plan after the COVID-19 pandemic passes. Twenty-seven percent expect to plan fewer meetings overall, while 35 percent say it's too soon to speculate.

Large Events Will Lag Behind

The most significant dip is anticipated by those who plan large meetings of more than 5,000 delegates; nearly half (47 percent) expect a decrease in the number of such events they will plan when business returns. Meanwhile, many expect to see a greater number of small gatherings, particularly those with 50 or fewer attendees.

Furthermore, planners foresee a decline in the number of events they will plan in specific meeting categories, including international meetings (48 percent), festivals and fairs (41 percent), trade shows (35 percent), sports/esports events (32 percent), corporate meetings (32 percent) and government meetings (31 percent).

Among other key findings:

- **Large venues will lose business.** Coinciding with a decrease in large events, planners expect to use large venues less often. Nearly two-thirds (61 percent) of respondents will use cruise ships less frequently following the COVID-19 pandemic, followed by fewer bookings of gaming properties (32 percent), sports facilities (31 percent) and convention centers (26 percent).



PULSE SURVEY

- **New skills and services are needed.** Recognizing the need to pivot, fully 82 percent expect an increased need for virtual event platforms, along with virtual site visits (76 percent), education specific to health/safety (74 percent), virtual hosted-buyer events (66 percent) and professional services for ensuring the health and safety of meeting participants (64 percent).
- **New precautions will be necessary on-site.** From hand sanitizers to room design, an overwhelming majority of planners are considering the following for their future events: providing hand sanitizers (88 percent), implementing social responsibility best practices/protocols (75 percent), displaying signage addressing prevention and controls (74 percent), new meeting room designs to allow distance between attendees (66 percent) and measures for reducing and managing crowd densities (65 percent).
- **There's still a lot to worry about.** Amid such an all-encompassing crisis, concerns are many and all relative, but the ones that planners are "very concerned" about from a business perspective are policies restricting business travel, cited by 53 percent, reduced meeting/event budgets (47 percent), less demand for in-person meetings (42 percent), hotel and venue safety preparedness (40 percent) and establishing or adopting new best practices for gatherings (38 percent).

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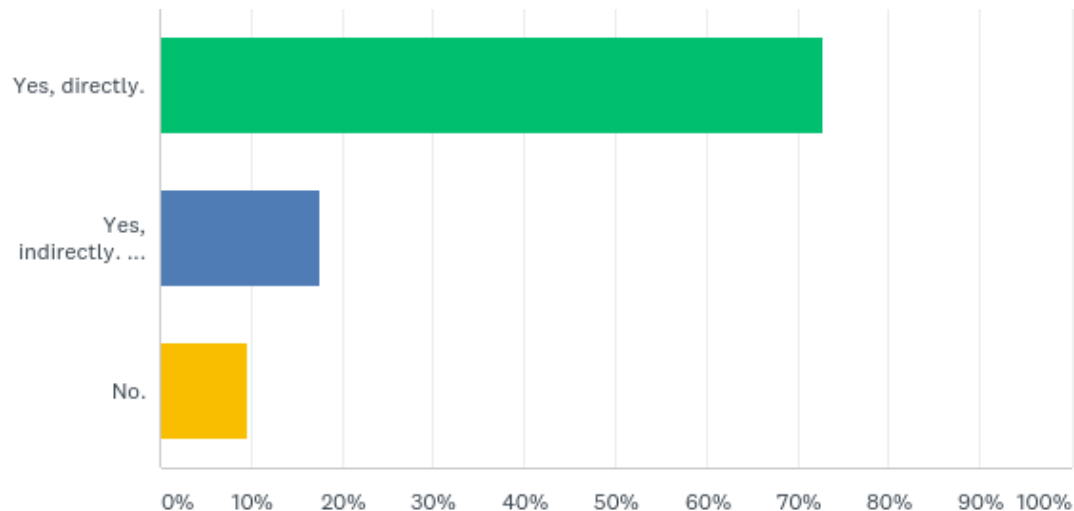
WEDNESDAY, APRIL 22, 2020



NORTHSTAR
MEETINGS GROUP

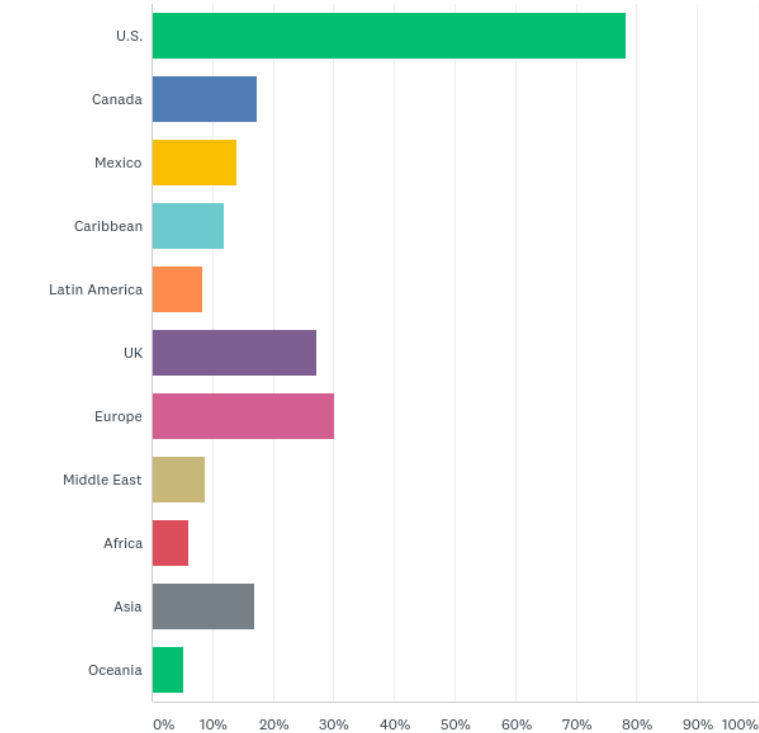
Q1: Prior to March 1, 2020, were you an organizer/planner of meeting and/or events of any type?

Answered: 1,155 Skipped: 1



Q2: What is the primary location of your business and your clients' businesses? Please check all that apply, if you work with multiple clients.

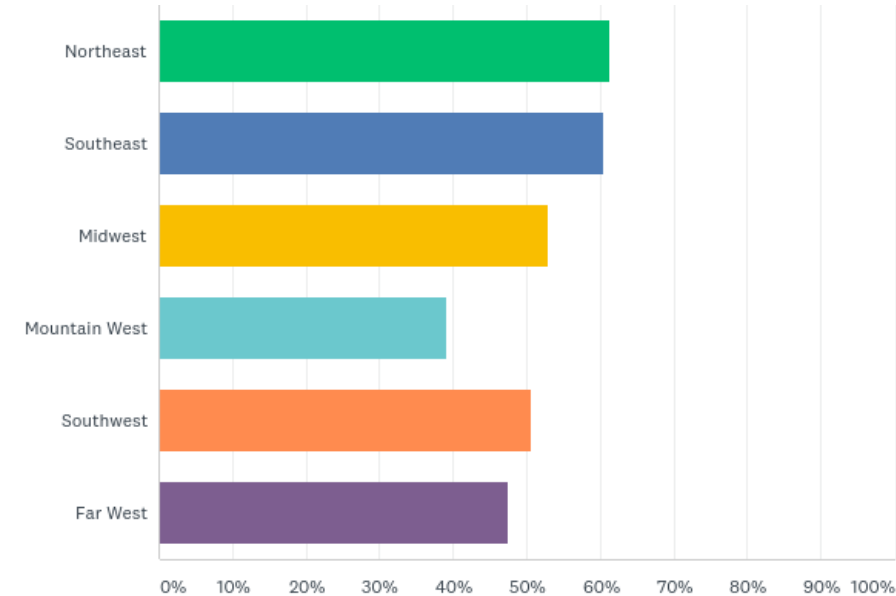
Answered: 1,030 Skipped: 126



| ANSWER CHOICES | RESPONSES | |
|--------------------------|-----------|-----|
| U.S. | 78.25% | 806 |
| Canada | 17.28% | 178 |
| Mexico | 13.98% | 144 |
| Caribbean | 11.84% | 122 |
| Latin America | 8.35% | 86 |
| UK | 27.18% | 280 |
| Europe | 30.10% | 310 |
| Middle East | 8.74% | 90 |
| Africa | 6.12% | 63 |
| Asia | 16.89% | 174 |
| Oceania | 5.24% | 54 |
| Total Respondents: 1,030 | | |

Q3: If your business or your clients' businesses are in the United States, which regions are you in?

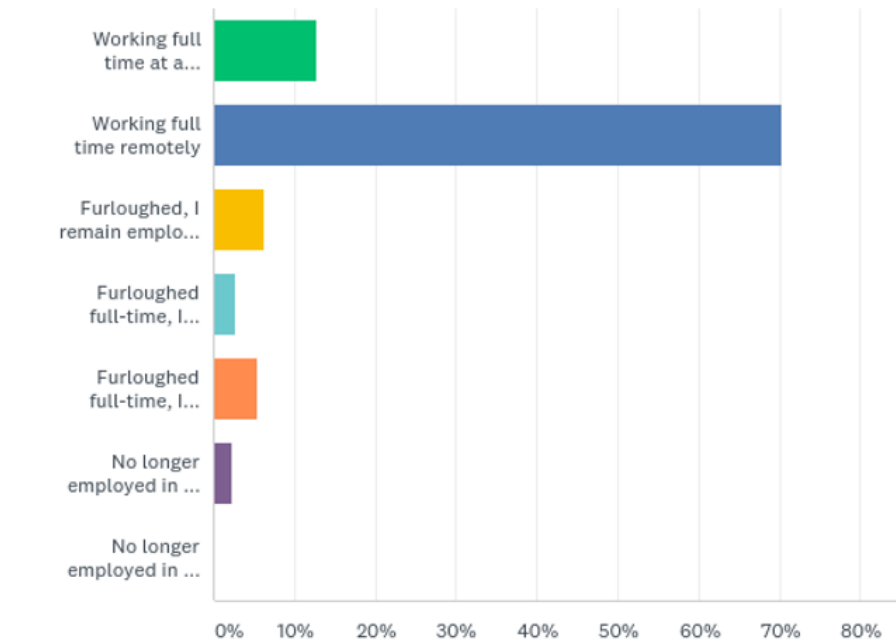
Answered: 783 Skipped: 373



| ANSWER CHOICES | RESPONSES | |
|------------------------|-----------|-----|
| Northeast | 61.30% | 480 |
| Southeast | 60.54% | 474 |
| Midwest | 52.87% | 414 |
| Mountain West | 39.21% | 307 |
| Southwest | 50.57% | 396 |
| Far West | 47.51% | 372 |
| Total Respondents: 783 | | |

Q4: Currently, what is your employment status?

Answered: 971 Skipped: 185



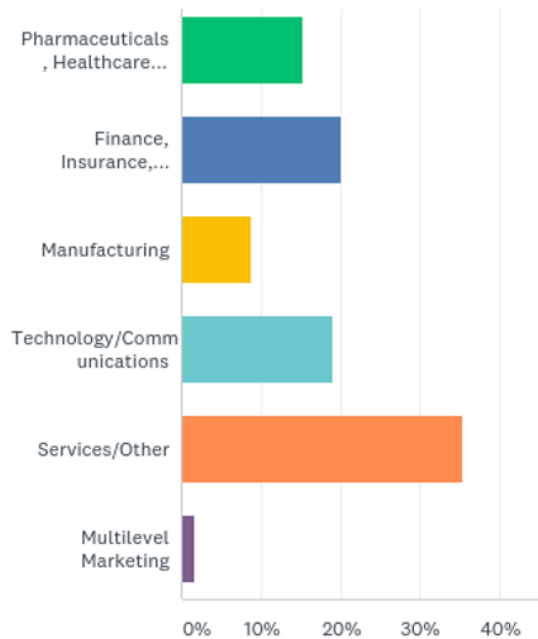
| ANSWER CHOICES | RESPONSES | |
|---|-----------|-----|
| Working full time at a business location | 12.77% | 124 |
| Working full time remotely | 70.34% | 683 |
| Furloughed, I remain employed but I am now working part-time. | 6.18% | 60 |
| Furloughed full-time, I remain employed but I am currently not working for a DEFINED period. | 2.68% | 26 |
| Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period. | 5.36% | 52 |
| No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry. | 2.37% | 23 |
| No longer employed in the job I had prior to March 1, 2020, and I do not intend to seek work in the meetings/events industry. | 0.31% | 3 |
| TOTAL | | 971 |

| ANSWER CHOICES | RESPONSES |
|---|------------|
| Professional Conference Organizer | 12.24% 118 |
| Association/Non-Profit Organization or Association Management Company | 21.47% 207 |
| Third Party/Independent Planner | 25.73% 248 |
| Exhibitions/Trade Show Organizer | 3.11% 30 |
| Travel Agency | 5.71% 55 |
| Social, Military, Education, Religious, Fraternal | 3.22% 31 |
| Sports | 6.43% 62 |
| Corporation | 18.57% 179 |
| Government | 3.53% 34 |
| TOTAL | 964 |

| ANSWER CHOICES | RESPONSES |
|--|------------|
| Yes, sourcing and booking future business | 39.46% 292 |
| Researching for future meetings but not booking | 35.68% 264 |
| Not planning, but staying in touch with destination and venue partners | 19.73% 146 |
| Not planning and not staying in contact at this point | 3.92% 29 |
| Not employed | 1.22% 9 |
| TOTAL | 740 |

Q6: If you work for a corporation, which industry are you in?

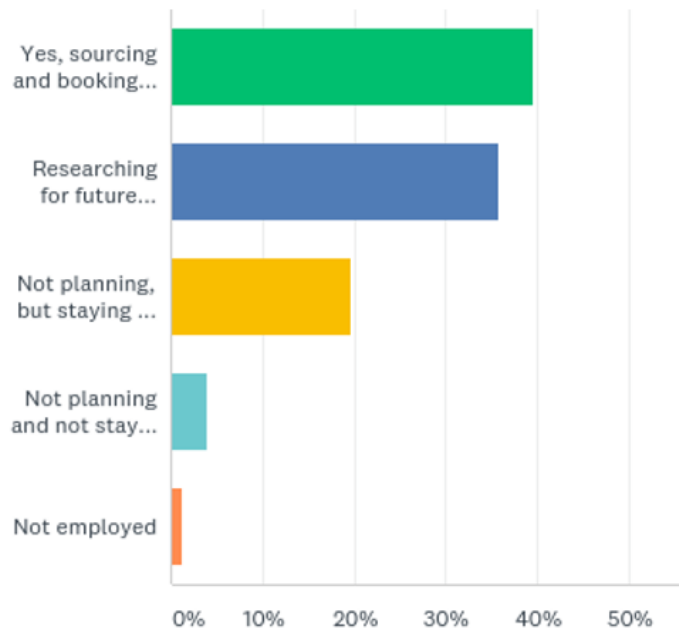
Answered: 184 Skipped: 972



| ANSWER CHOICES | RESPONSES | |
|--|-----------|-----|
| Pharmaceuticals, Healthcare, Medical | 15.22% | 28 |
| Finance, Insurance, Banking, Real Estate | 20.11% | 37 |
| Manufacturing | 8.70% | 16 |
| Technology/Communications | 19.02% | 35 |
| Services/Other | 35.33% | 65 |
| Multilevel Marketing | 1.63% | 3 |
| TOTAL | | 184 |

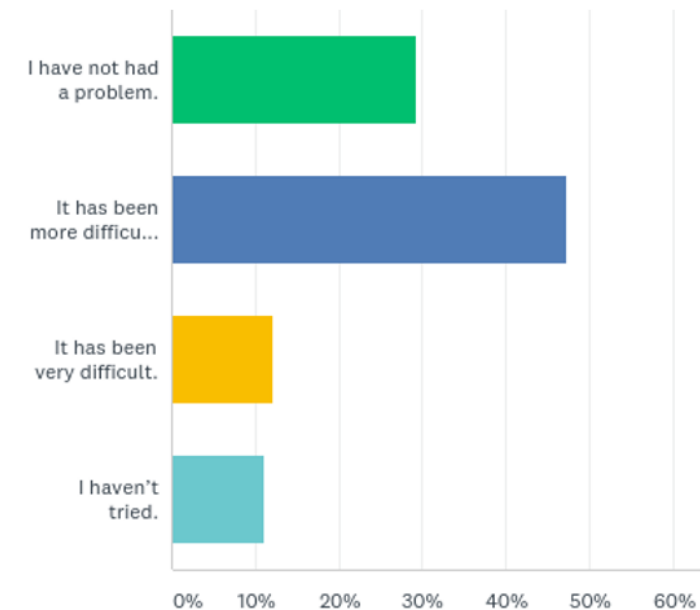
Q7: If you are currently employed (and/or furloughed) as a meeting planner, are you working on future meetings?

Answered: 740 Skipped: 416



Q8: What is your current experience in reaching out to suppliers of meeting services (hotels, venues, destination marketing organizations, destination management companies, etc.)?

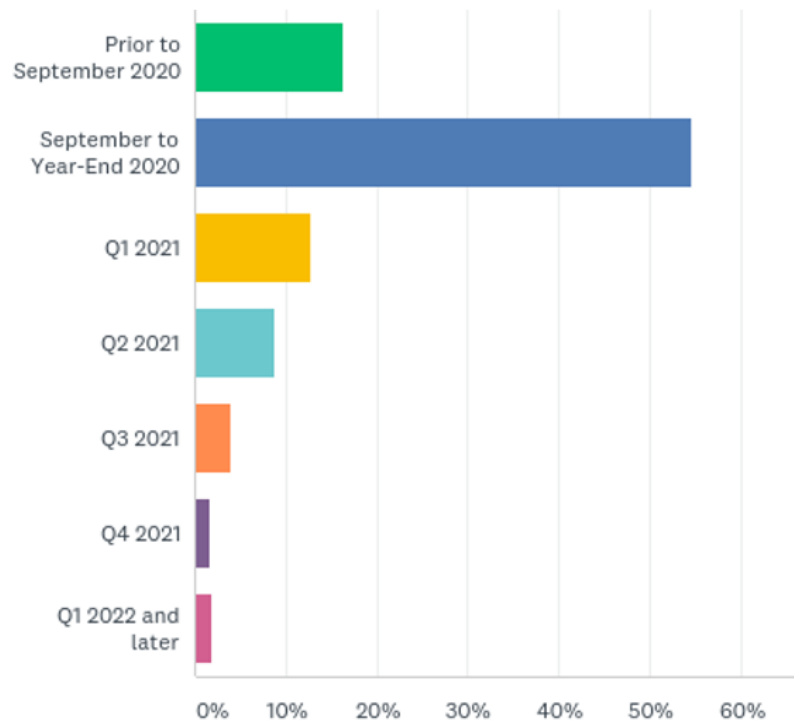
Answered: 752 Skipped: 404



| ANSWER CHOICES | RESPONSES | |
|--|-----------|-----|
| I have not had a problem. | 29.39% | 221 |
| It has been more difficult than usual. | 47.21% | 355 |
| It has been very difficult. | 12.23% | 92 |
| I haven't tried. | 11.17% | 84 |
| TOTAL | | 752 |

Q9: When is the earliest you are RESCHEDULING meetings and events?

Answered: 749 Skipped: 407



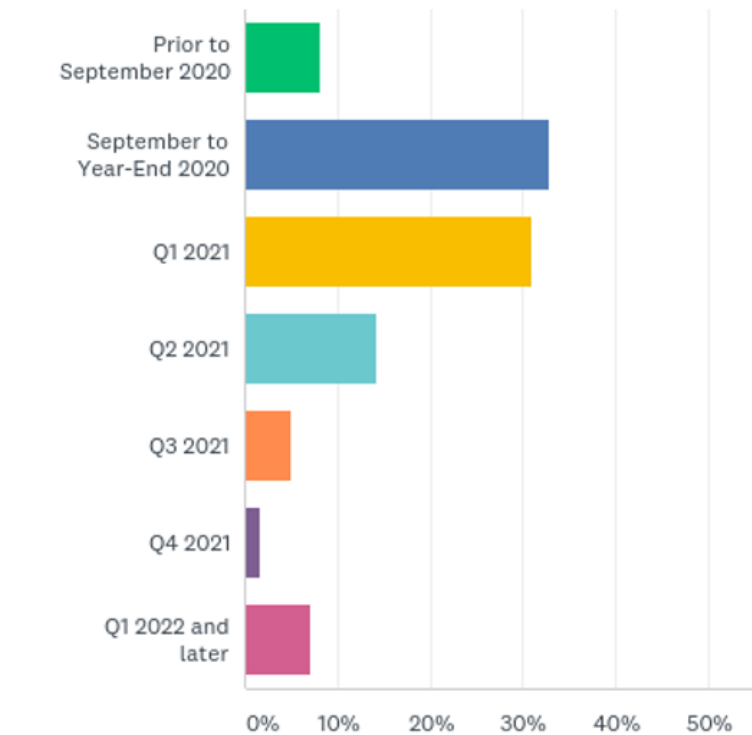
| ANSWER CHOICES | RESPONSES | |
|----------------------------|-----------|-----|
| Prior to September 2020 | 16.29% | 122 |
| September to Year-End 2020 | 54.61% | 409 |
| Q1 2021 | 12.68% | 95 |
| Q2 2021 | 8.81% | 66 |
| Q3 2021 | 4.01% | 30 |
| Q4 2021 | 1.74% | 13 |
| Q1 2022 and later | 1.87% | 14 |
| TOTAL | | 749 |

Q9: When is the earliest you are RESCHEDULING meetings and events (by region)?

| Key | | Q2 | | | | | | | | | | | |
|--|----------------------------|---|----------------------------------|---------------------------------|------------------------------|---------------------------------|-----------------------------------|-----------------------------------|---------------------------------|-----------------------------|---------------------------------|-------------------------------|-------|
| Count Percent of total Row percentage Column percentage | | What is the primary location of your business and your clients' businesses? Please check all that apply, if you work with multi | | | | | | | | | | | |
| | | U.S. | Canada | Mexico | Caribbean | Latin America | UK | Europe | Middle East | Africa | Asia | Oceania | Total |
| Q9 When is the earliest you are RESCHEDULING meetings and events? | Prior to September 2020 | 106 14.17% 87.63% 17.79% | 20 2.67% 16.53% 13.99% | 17 2.27% 14.05% 14.41% | 11 1.47% 9.09% 11% | 9 1.2% 7.44% 12.68% | 25 3.34% 20.66% 12.02% | 29 3.88% 23.97% 11.93% | 9 1.2% 7.44% 13.43% | 8 1.07% 6.61% 16% | 16 2.14% 13.22% 13.22% | 5 0.67% 4.13% 10.42% | 121 |
| | September to Year-End 2020 | 321 42.91% 78.48% 53.86% | 76 10.16% 18.58% 53.15% | 72 9.63% 17.6% 61.02% | 60 8.02% 14.67% 60% | 41 5.48% 10.02% 57.75% | 121 16.18% 29.58% 58.17% | 141 18.85% 34.47% 58.02% | 36 4.81% 8.8% 53.73% | 28 3.74% 6.85% 56% | 63 8.42% 15.4% 52.07% | 27 3.61% 6.6% 56.25% | 409 |
| | Q1 2021 | 69 9.22% 72.63% 11.58% | 19 2.54% 20% 13.29% | 13 1.74% 13.68% 11.02% | 10 1.34% 10.53% 10% | 11 1.47% 11.58% 15.49% | 34 4.55% 35.79% 16.35% | 40 5.35% 42.11% 16.46% | 15 2.01% 15.79% 22.39% | 9 1.2% 9.47% 18% | 16 2.14% 16.84% 13.22% | 7 0.94% 7.37% 14.58% | 95 |
| | Q2 2021 | 50 6.68% 75.76% 8.39% | 15 2.01% 22.73% 10.49% | 10 1.34% 15.15% 8.47% | 12 1.6% 18.18% 12% | 7 0.94% 10.61% 9.86% | 16 2.14% 24.24% 7.69% | 23 3.07% 34.85% 9.47% | 5 0.67% 7.58% 7.46% | 3 0.4% 4.55% 6% | 16 2.14% 24.24% 13.22% | 6 0.8% 9.09% 12.5% | 66 |
| | Q3 2021 | 26 3.48% 86.67% 4.36% | 7 0.94% 23.33% 4.9% | 2 0.27% 6.67% 1.69% | 3 0.4% 10% 3% | 0 0% 0% 0% | 6 0.8% 20% 2.88% | 5 0.67% 16.67% 2.06% | 1 0.13% 3.33% 1.49% | 1 0.13% 3.33% 2% | 3 0.4% 10% 2.48% | 0 0% 0% 0% | 30 |
| | Q4 2021 | 13 1.74% 100% 2.18% | 4 0.53% 30.77% 2.8% | 4 0.53% 30.77% 3.39% | 4 0.53% 30.77% 4% | 2 0.27% 15.38% 2.82% | 4 0.53% 30.77% 1.92% | 4 0.53% 30.77% 1.65% | 1 0.13% 7.69% 1.49% | 1 0.13% 7.69% 2% | 3 0.4% 23.08% 2.48% | 2 0.27% 15.38% 4.17% | 13 |
| | Q1 2022 and later | 11 1.47% 78.57% 1.85% | 2 0.27% 14.29% 1.4% | 0 0% 0% 0% | 0 0% 0% 0% | 1 0.13% 7.14% 1.41% | 2 0.27% 14.29% 0.96% | 1 0.13% 7.14% 0.41% | 0 0% 0% 0% | 0 0% 0% 0% | 4 0.53% 28.57% 3.31% | 1 0.13% 7.14% 2.08% | 14 |

Q10: When is the earliest you are scheduling NEW meetings and events?

Answered: 747 Skipped: 409



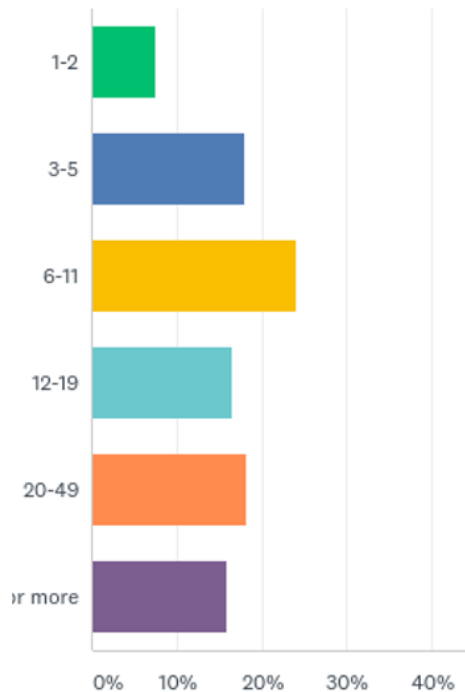
| ANSWER CHOICES | RESPONSES | |
|----------------------------|-----------|-----|
| Prior to September 2020 | 8.17% | 61 |
| September to Year-End 2020 | 32.80% | 245 |
| Q1 2021 | 30.92% | 231 |
| Q2 2021 | 14.32% | 107 |
| Q3 2021 | 5.09% | 38 |
| Q4 2021 | 1.61% | 12 |
| Q1 2022 and later | 7.10% | 53 |
| TOTAL | | 747 |

Q9: When is the earliest you are scheduling NEW meetings and events (by region)?

| Key | | Q2 | | | | | | | | | | | |
|---|----------------------------|---|---------------------------------|---------------------------------|------------------------------|---------------------------------|---------------------------------|----------------------------------|--------------------------------|------------------------------|---------------------------------|--------------------------------|-------|
| Count Percent of total Row percentage column percentage | | What is the primary location of your business and your clients' businesses? Please check all that apply, if you work with multiple clients. | | | | | | | | | | | |
| | | U.S. | Canada | Mexico | Caribbean | Latin America | UK | Europe | Middle East | Africa | Asia | Oceania | Total |
| Q10 When is the earliest you are scheduling NEW meetings and events? | Prior to September 2020 | 49 6.56% 80.33% 8.22% | 9 1.2% 14.75% 6.34% | 7 0.94% 11.48% 5.55% | 4 0.54% 6.56% 4% | 5 0.67% 8.2% 7.14% | 14 1.87% 22.95% 6.76% | 15 2.01% 24.59% 6.22% | 4 0.54% 6.56% 5.97% | 6 0.8% 9.84% 12% | 9 1.2% 14.75% 7.44% | 3 0.4% 4.92% 6.12% | 61 |
| | September to Year-End 2020 | 185 24.77% 75.51% 31.04% | 41 5.49% 16.73% 28.87% | 36 4.82% 14.69% 30.25% | 32 4.28% 13.06% 32% | 19 2.54% 7.76% 27.14% | 70 9.37% 28.57% 33.82% | 72 9.64% 29.39% 29.88% | 21 2.81% 8.57% 31.34% | 13 1.74% 5.31% 26% | 33 4.42% 13.47% 27.27% | 20 2.68% 8.16% 40.82% | 245 |
| | Q1 2021 | 187 25.03% 80.95% 31.38% | 46 6.16% 19.91% 32.39% | 42 5.62% 18.18% 35.29% | 36 4.82% 15.58% 36% | 26 3.48% 11.26% 37.14% | 74 9.91% 32.03% 35.75% | 84 11.24% 36.36% 34.85% | 23 3.08% 9.96% 34.33% | 13 1.74% 5.63% 26% | 39 5.22% 16.88% 32.23% | 11 1.47% 4.76% 22.45% | 231 |
| | Q2 2021 | 85 11.38% 79.44% 14.26% | 18 2.41% 16.82% 12.65% | 15 2.01% 14.02% 12.61% | 15 2.01% 14.02% 15% | 9 1.2% 8.41% 12.86% | 21 2.81% 19.63% 10.14% | 37 4.95% 34.58% 15.35% | 10 1.34% 9.35% 14.93% | 12 1.61% 11.21% 24% | 18 2.41% 16.82% 14.88% | 9 1.2% 8.41% 18.37% | 107 |
| | Q3 2021 | 32 4.28% 84.21% 5.37% | 13 1.74% 34.21% 9.15% | 9 1.2% 23.68% 7.56% | 5 0.67% 13.16% 5% | 4 0.54% 10.53% 5.71% | 14 1.87% 36.84% 6.76% | 14 1.87% 36.84% 5.81% | 6 0.8% 15.79% 8.96% | 3 0.4% 7.59% 6% | 9 1.2% 23.68% 7.44% | 2 0.27% 5.26% 4.08% | 38 |
| | Q4 2021 | 10 1.34% 83.33% 1.68% | 1 0.13% 8.33% 0.7% | 4 0.54% 33.33% 3.36% | 3 0.4% 25% 3% | 0 0% 0% 0% | 3 0.4% 25% 1.45% | 2 0.27% 16.67% 0.83% | 0 0% 0% 0% | 0 0% 0% 0% | 0 0% 0% 0% | 0 0% 0% 0% | 12 |
| | Q1 2022 and later | 48 6.43% 90.57% 8.05% | 14 1.87% 26.42% 9.86% | 6 0.8% 11.32% 5.04% | 5 0.67% 9.43% 5% | 7 0.94% 13.21% 10% | 11 1.47% 20.75% 5.31% | 17 2.28% 32.08% 7.05% | 3 0.4% 5.66% 4.48% | 3 0.4% 5.66% 6% | 13 1.74% 24.53% 10.74% | 4 0.54% 7.55% 8.16% | 53 |

Q11: Prior to March 1, how many off-site meetings, trade shows, conventions and/or incentive travel programs in total were you involved in planning per year?

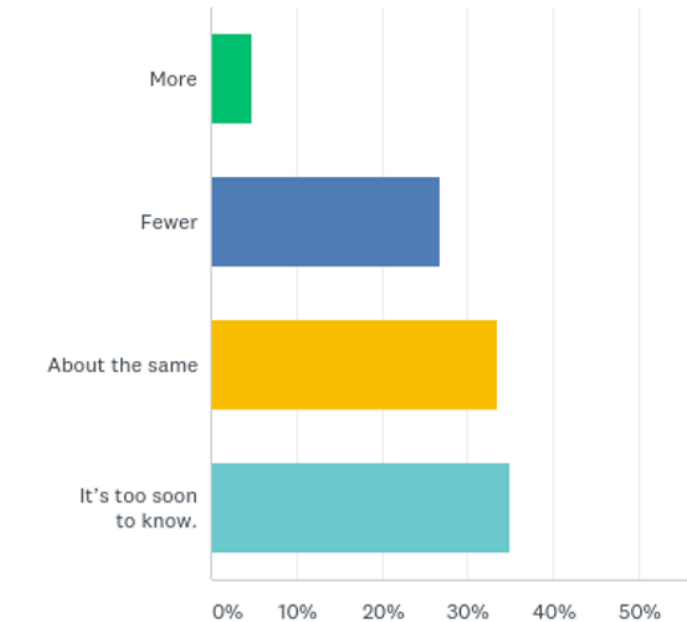
Answered: 753 Skipped: 403



| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----|
| 1-2 | 7.44% | 56 |
| 3-5 | 17.93% | 135 |
| 6-11 | 24.04% | 181 |
| 12-19 | 16.47% | 124 |
| 20-49 | 18.19% | 137 |
| 50 or more | 15.94% | 120 |
| TOTAL | | 753 |

Q12: Once the threat of COVID-19 has passed, over the subsequent 12 to 18 months, will you be planning more or fewer meetings than previously?

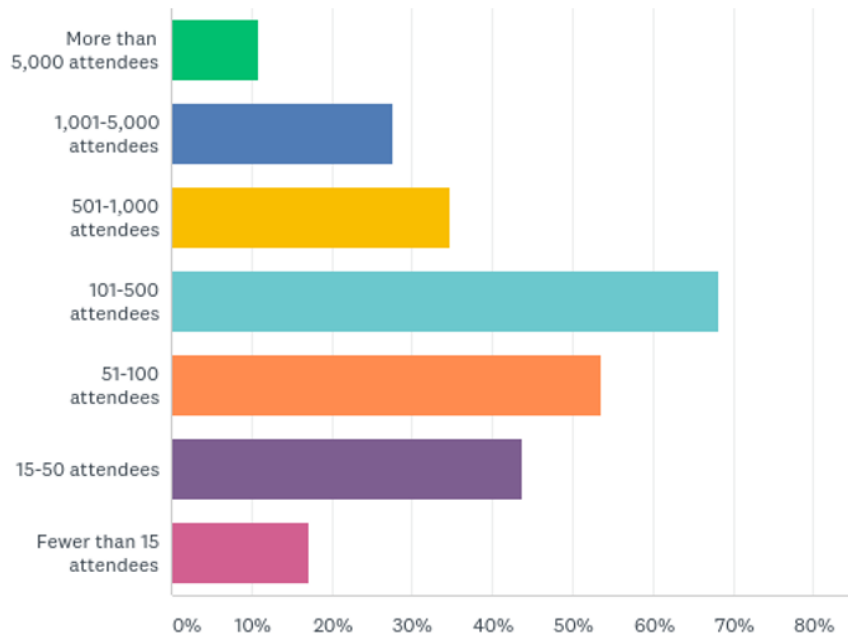
Answered: 753 Skipped: 403



| ANSWER CHOICES | RESPONSES | |
|------------------------|-----------|-----|
| More | 4.91% | 37 |
| Fewer | 26.69% | 201 |
| About the same | 33.47% | 252 |
| It's too soon to know. | 34.93% | 263 |
| TOTAL | | 753 |

Q13: Prior to March 1, what sizes were your meetings and events? (Select all that apply.)

Answered: 753 Skipped: 403



| ANSWER CHOICES | RESPONSES | |
|---------------------------|-----------|-----|
| More than 5,000 attendees | 10.89% | 82 |
| 1,001-5,000 attendees | 27.62% | 208 |
| 501-1,000 attendees | 34.79% | 262 |
| 101-500 attendees | 68.13% | 513 |
| 51-100 attendees | 53.65% | 404 |
| 15-50 attendees | 43.69% | 329 |
| Fewer than 15 attendees | 17.13% | 129 |
| Total Respondents: 753 | | |

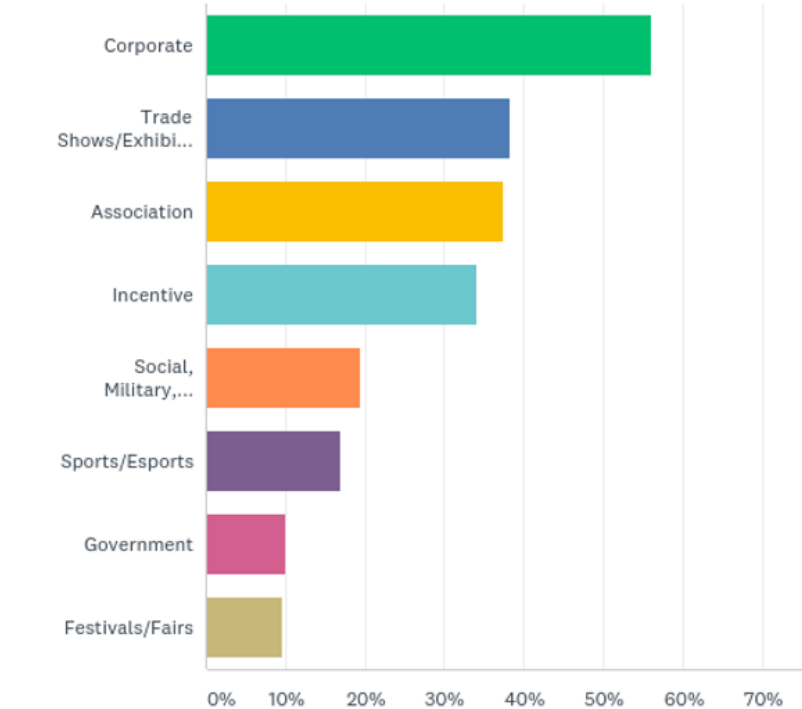
Q14: Once the threat of COVID-19 has passed, over the subsequent 12 to 18 months, will you be planning more or fewer meetings of the size(s) you noted above? Please choose one in each row, and select N/A (not applicable) where appropriate.

Answered: 753 Skipped: 403

| | MORE | FEWER | ABOUT THE SAME | TOTAL |
|---------------------------|---------------|---------------|----------------|-------|
| More than 5,000 attendees | 2.61% 4 | 47.06% 72 | 50.33% 77 | 153 |
| 1,001-5,000 attendees | 5.58% 15 | 36.06% 97 | 58.36% 157 | 269 |
| 501-1,000 attendees | 5.04% 18 | 33.89% 121 | 61.06% 218 | 357 |
| 101-500 attendees | 4.90% 29 | 31.42% 186 | 63.68% 377 | 592 |
| 51-100 attendees | 10.93% 61 | 26.16% 146 | 62.90% 351 | 558 |
| 15-50 attendees | 20.20% 103 | 16.27% 83 | 63.53% 324 | 510 |
| Fewer than 15 attendees | 19.06% 65 | 15.54% 53 | 65.40% 223 | 341 |

Q15: Prior to March 1, what types of meetings, events and incentive programs did you plan? (Select all that apply.)

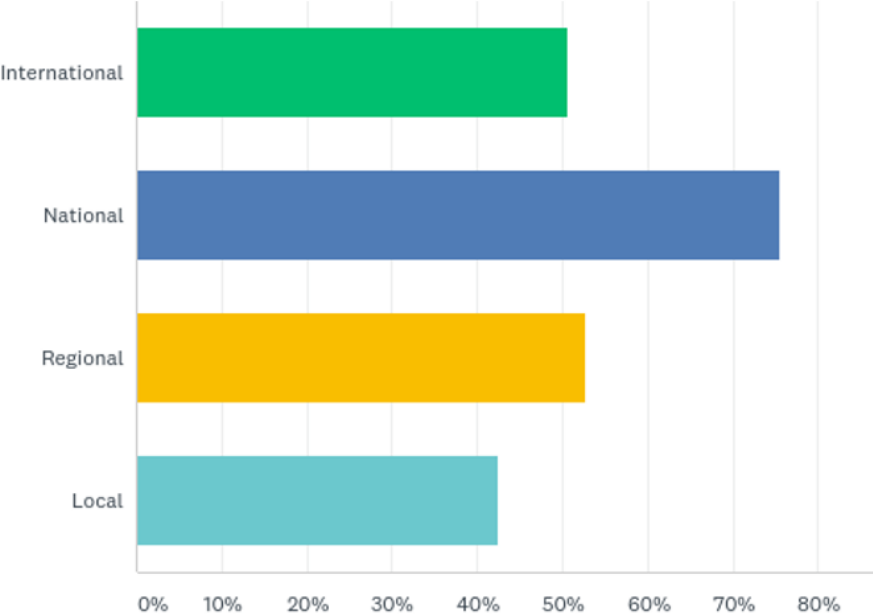
Answered: 753 Skipped: 403



| ANSWER CHOICES | RESPONSES | |
|--|-----------|-----|
| Corporate | 56.04% | 422 |
| Trade Shows/Exhibitions/Congresses | 38.25% | 288 |
| Association | 37.45% | 282 |
| Incentive | 34.00% | 256 |
| Social, Military, Education, Religion, Fraternal | 19.52% | 147 |
| Sports/Esports | 17.00% | 128 |
| Government | 10.09% | 76 |
| Festivals/Fairs | 9.56% | 72 |
| Total Respondents: 753 | | |

Q16: Prior to March 1, where were the meetings, events and incentive programs you planned held? (Select all that apply.)

Answered: 755 Skipped: 401



| ANSWER CHOICES | RESPONSES | |
|------------------------|-----------|-----|
| International | 50.60% | 382 |
| National | 75.50% | 570 |
| Regional | 52.72% | 398 |
| Local | 42.38% | 320 |
| Total Respondents: 755 | | |

Q17: Once the threat of COVID-19 has passed, over the subsequent 12 to 18 months, relative to before the crisis, do you expect to plan more, fewer or about the same number of the meeting types and locations noted above?

Answered: 755 Skipped: 401

| | MORE | FEWER | ABOUT THE SAME | TOTAL |
|--|---------------|---------------|----------------|-------|
| International | 4.47% 19 | 48.00% 204 | 47.53% 202 | 425 |
| National | 9.87% 61 | 26.38% 163 | 63.75% 394 | 618 |
| Regional | 19.89% 105 | 21.21% 112 | 58.90% 311 | 528 |
| Local | 24.44% 119 | 17.25% 84 | 58.32% 284 | 487 |
| Trade Shows/Exhibitions/Congresses | 3.72% 12 | 34.98% 113 | 61.30% 198 | 323 |
| Association | 4.58% 14 | 22.22% 68 | 73.20% 224 | 306 |
| Corporate | 8.33% 34 | 31.62% 129 | 60.05% 245 | 408 |
| Government | 12.96% 14 | 30.56% 33 | 56.48% 61 | 108 |
| Social, Military, Education, Religion, Fraternal | 11.56% 20 | 27.17% 47 | 61.27% 106 | 173 |
| Sports/Esports | 10.74% 16 | 32.21% 48 | 57.05% 85 | 149 |
| Festivals/Fairs | 9.82% 11 | 41.07% 46 | 49.11% 55 | 112 |

Q18: Once the threat of COVID-19 has passed, over the subsequent 12 to 18 months, do you expect any change in the types of facilities you select for off-site meetings? For each venue type, please indicate “more,” “fewer” or “about the same”.

Answered: 748 Skipped: 408

| | MORE | FEWER | ABOUT THE SAME | TOTAL |
|-------------------------------|--------------|---------------|-----------------------|--------------|
| Downtown Hotel | 5.56% 34 | 16.01% 98 | 78.43% 480 | 612 |
| Suburban Hotel | 10.00% 46 | 14.13% 65 | 75.87% 349 | 460 |
| Boutique Hotel | 9.40% 41 | 15.14% 66 | 75.46% 329 | 436 |
| Airport Hotel | 6.73% 23 | 22.22% 76 | 71.05% 243 | 342 |
| Resort | 9.38% 47 | 16.37% 82 | 74.25% 372 | 501 |
| Golf Resort | 5.35% 17 | 20.75% 66 | 73.90% 235 | 318 |
| Conference Center | 5.83% 26 | 22.65% 101 | 71.52% 319 | 446 |
| Convention Center | 6.04% 23 | 25.72% 98 | 68.24% 260 | 381 |
| Sports Facility/Stadium/Arena | 8.57% 18 | 31.43% 66 | 60.00% 126 | 210 |
| Gaming Facility | 6.94% 12 | 32.37% 56 | 60.69% 105 | 173 |
| Cruise Ship | 7.74% 12 | 60.65% 94 | 31.61% 49 | 155 |
| Other | 15.65% 23 | 12.24% 18 | 72.11% 106 | 147 |

Q19: Once the threat of COVID-19 has passed, over the subsequent 12 to 18 months, do you expect you will require more or fewer of these products/services to plan your meetings and events? (Check all that apply.)

Answered: 745 Skipped: 411

| | MORE | FEWER | ABOUT THE SAME | TOTAL | WEIGHTED AVERAGE |
|--|---------------|---------------|----------------|-------|------------------|
| Virtual event platforms | 81.61% 497 | 4.76% 29 | 13.63% 83 | 609 | 1.32 |
| Virtual site visits | 76.25% 443 | 4.99% 29 | 18.76% 109 | 581 | 1.43 |
| Education specific to legal matters | 62.10% 326 | 2.67% 14 | 35.24% 185 | 525 | 1.73 |
| Education specific to health/medical safety matters | 73.50% 405 | 2.72% 15 | 23.77% 131 | 551 | 1.50 |
| Engagement of professional legal advisory services | 47.60% 238 | 3.00% 15 | 49.40% 247 | 500 | 2.02 |
| Engagement of health/medical safety advisory services | 64.13% 320 | 3.81% 19 | 32.06% 160 | 499 | 1.68 |
| In-person, hosted-buyer events and fairs to support buying decisions | 22.35% 116 | 26.59% 138 | 51.06% 265 | 519 | 2.29 |
| Virtual hosted-buyer events and fairs to support buying decisions | 65.57% 278 | 10.38% 44 | 24.06% 102 | 424 | 1.58 |
| Event management software | 25.76% 136 | 7.01% 37 | 67.23% 355 | 528 | 2.41 |
| Event marketing software | 26.67% 120 | 5.78% 26 | 67.56% 304 | 450 | 2.41 |
| On-site attendee-tracking tools | 28.54% 137 | 7.92% 38 | 63.54% 305 | 480 | 2.35 |
| Improved RFP tools | 32.07% 152 | 5.27% 25 | 62.66% 297 | 474 | 2.31 |

Q20: How concerned are you about the following, relative to conditions before March 1, 2020? (Choose one in each row.)

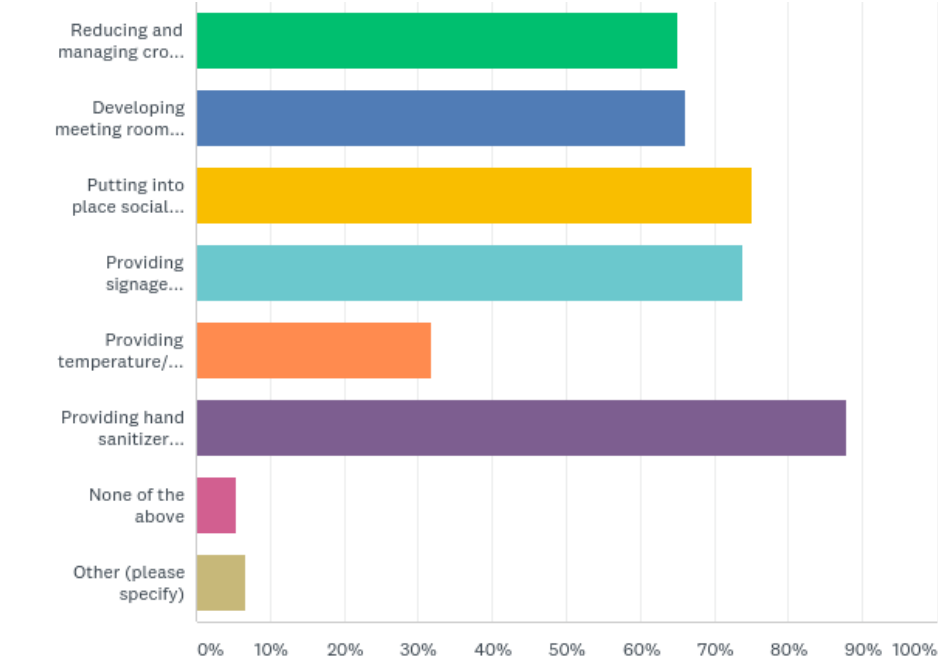
Answered: 747 Skipped: 409

| | VERY CONCERNED | SOMEWHAT CONCERNED | NOT CONCERNED | TOTAL |
|---|----------------|--------------------|---------------|-------|
| Reduced demand for in-person meetings and events | 42.39% 309 | 38.27% 279 | 19.34% 141 | 729 |
| Reduced meeting and event budgets | 47.28% 348 | 36.14% 266 | 16.58% 122 | 736 |
| Travel policy updates restricting business travel | 52.86% 388 | 31.74% 233 | 15.40% 113 | 734 |
| New best practices for gatherings | 38.08% 278 | 40.41% 295 | 21.51% 157 | 730 |
| Airline accessibility | 32.17% 221 | 40.17% 276 | 27.66% 190 | 687 |
| Airline fares | 31.54% 217 | 39.10% 269 | 29.36% 202 | 688 |
| Hotel and venue health and safety preparedness | 39.56% 288 | 38.32% 279 | 22.12% 161 | 728 |
| Hotel and venue availability | 25.86% 187 | 40.66% 294 | 33.47% 242 | 723 |

| | VERY CONCERNED | SOMEWHAT CONCERNED | NOT CONCERNED | TOTAL |
|-------------------------------------|----------------|--------------------|---------------|-------|
| Hotel and venue service levels | 29.86% 215 | 36.81% 265 | 33.33% 240 | 720 |
| Hotel and venue pricing and rates | 34.76% 252 | 40.97% 297 | 24.28% 176 | 725 |
| Hotel commission policies | 28.23% 179 | 32.97% 209 | 38.80% 246 | 634 |
| Food-and-beverage safety | 33.56% 243 | 35.64% 258 | 30.80% 223 | 724 |
| Food-and-beverage pricing | 29.32% 212 | 41.91% 303 | 28.77% 208 | 723 |
| DMO availability and service levels | 16.64% 91 | 36.01% 197 | 47.35% 259 | 547 |
| DMC availability and service levels | 16.93% 95 | 35.12% 197 | 47.95% 269 | 561 |

Q21: Are you considering any of the following in the planning of future events? (Select all that apply.)

Answered: 748 Skipped: 408



| ANSWER CHOICES | RESPONSES |
|--|------------|
| Reducing and managing crowd densities | 64.97% 486 |
| Developing meeting room designs to encourage physical distancing | 66.04% 494 |
| Putting into place social responsibility best practices, including protocols for attendees who are ill | 75.13% 562 |
| Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.) | 73.93% 553 |
| Providing temperature/health screening | 31.82% 238 |
| Providing hand sanitizer on-site for staff and attendees | 87.97% 658 |
| None of the above | 5.35% 40 |
| Other (please specify) | 6.68% 50 |
| Total Respondents: 748 | |