

PULSE SURVEY

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

May 19, 2020



EXECUTIVE SUMMARY

Meeting planner optimism about the return of live events is waning, according to Northstar Meetings Group's latest PULSE Survey. Fewer respondents are actively planning and booking meetings. Those who are, meanwhile, are increasingly choosing dates in 2021 at the earliest. And even when we're past the COVID-19 crisis, we should expect to see fewer, smaller and more local events. A decline in confidence is evident throughout the survey's May 19 findings.

Northstar's PULSE Survey, conducted every two weeks, assesses how the global pandemic has affected meeting planners, including their job status, business plans and projections for the future of their events. This week's findings are based on 805 planner respondents.

More are looking, fewer are booking

The job market for meeting planners has remained stable, with 82 percent still working full time, and a slight uptick in the number of those based in their business locations rather than at home. However, the percentage of planners sourcing and booking has steadily declined, from 40 percent in mid-April to 31 percent in the most recent PULSE Survey. At the same time, fewer are doing the legwork now for future meetings and events. Nearly 28 percent are in a holding pattern and not actively planning meetings at this point.

Working with suppliers is a growing problem

For almost two-thirds of respondents, reaching suppliers has been more difficult than usual or "very difficult," while the number of planners who haven't had a problem has dipped to 23 percent. The fact that unemployment in the travel sector has reached 51 percent is likely the driving factor. The impasse has widened in the past four weeks, per the PULSE Survey, pointing to an opportunity for suppliers to be more accessible to clients and prospects.

Events are shifting into 2021

Rescheduled events are moving out of 2020 and into next year. Results show a steady decline in the number of planners expected to hold live events this summer at the earliest. Half of respondents have pushed dates into 2021 and beyond.

The decline in confidence is more significant for new (not rescheduled) events. Just 28 percent expect to go forward with meetings this year; of those, fewer than 5 percent plan to meet this summer.

Fewer meetings will be held next year

In terms of the number of events respondents will plan for next year, the overriding sentiment has shifted from "too soon to know" to an understanding that fewer events will be held next year. In just two weeks, those expecting the number of events to decline rose from 30 percent to 36 percent.

The largest events will see the greatest decline

Not surprisingly, once the threat of COVID-19 is behind us, meetings that draw 5,000 attendees or more will see the steepest drop in frequency. More than half (55 percent) of respondents expect to plan fewer events of that size in the 12 to 18 months following the crisis. That's up dramatically from 40 percent just two weeks ago.

The more local the event, the more likely it is to happen

Even when COVID-19 is no longer a threat, more than half of respondents say they'll plan fewer international events. That declining confidence is notable for national and regional events, too. For local events, the only category where a slight uptick in volume was anticipated over the past month, the expectation now is for that business to remain flat.



PULSE SURVEY



Big venues have the most to lose

It stands to reason that a dramatic drop in the number of large events being planned will coincide with less need for large venues. While every type of venue should expect a decline in business, per survey results, the most dramatic losses will be felt by cruise ships, gaming facilities, sports venues and convention centers. Those that stand to lose the least are resorts, boutique hotels and suburban properties.

Digital, legal and medical advice is needed

With the only certainty being that live meetings will be dramatically different, planners recognize the need for knowledge about digital event platforms, virtual site visits, legal guidance and medical advice. These imperatives have remained consistent week over week, along with strong needs for information about the logistics of live events going forward.

Travel policies and airfares are top worries

Planners have a long list of concerns. Chief among them, cited by 86 percent of respondents, is that business travel policies will restrict people from attending meetings. The survey shows consistently high levels of concern about budget cuts, reduced demand, F&B safety and the ability of hotels and venues to safely accommodate their groups. Meanwhile, this week's findings reveal a dramatic increase in concern about rising airfares and the availability of flights.



PULSE SURVEY



You told us more

Verbatim comments indicate that meeting planners are worried not only about logistics, but about making their concerns known to decision-makers and stakeholders. "My biggest struggle is trying to keep our executives and board grounded in reality," lamented one respondent. "They are very optimistic that our fall 2020 event will not only take place but will be just the same as other years. I have been doing my best to provide realistic options and manage expectations, but so far I worry that I am not being heard."

Uncertainty is clearly disconcerting. "It's impossible to know what the future holds; all we know is that it will be different," another planner commented. "Our industry will be better as long as we all collaborate and are aware of our responsibilities to our clients and our industry — and not just ourselves."



PULSE SURVEY

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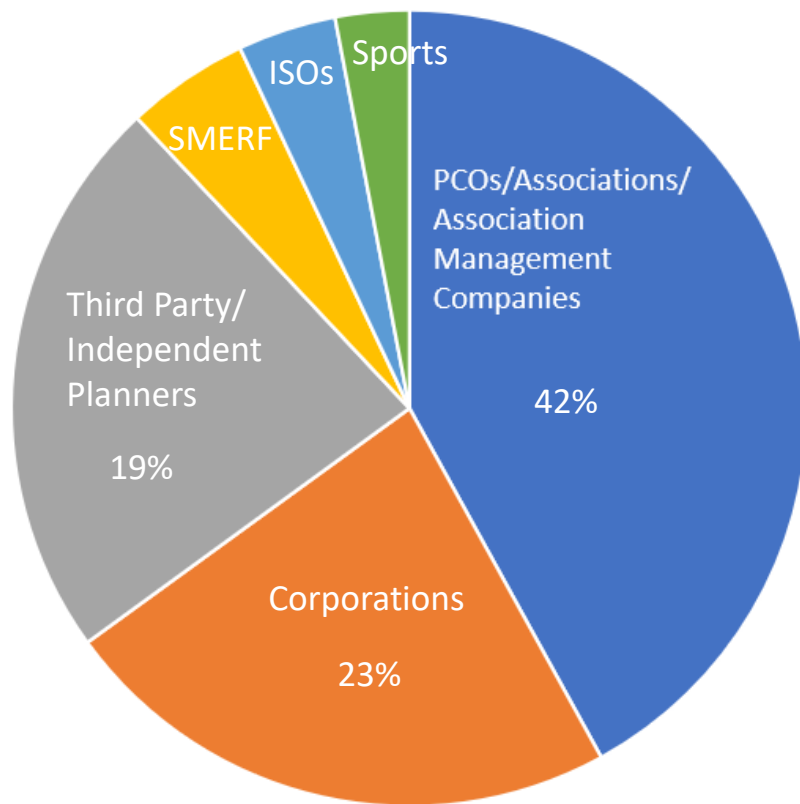
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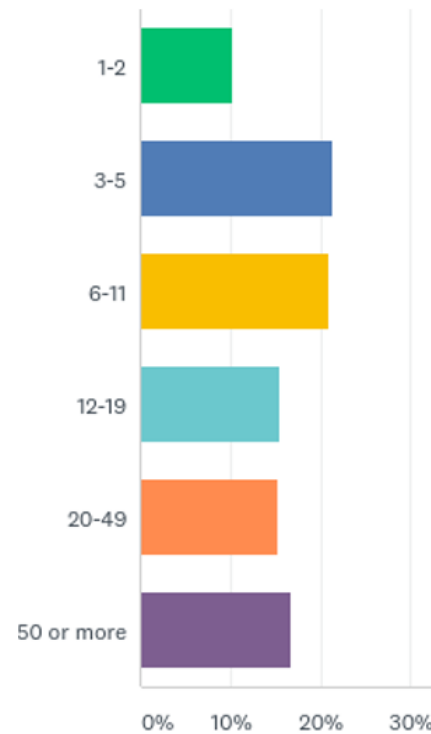
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Respondents By Type, Volume and Size

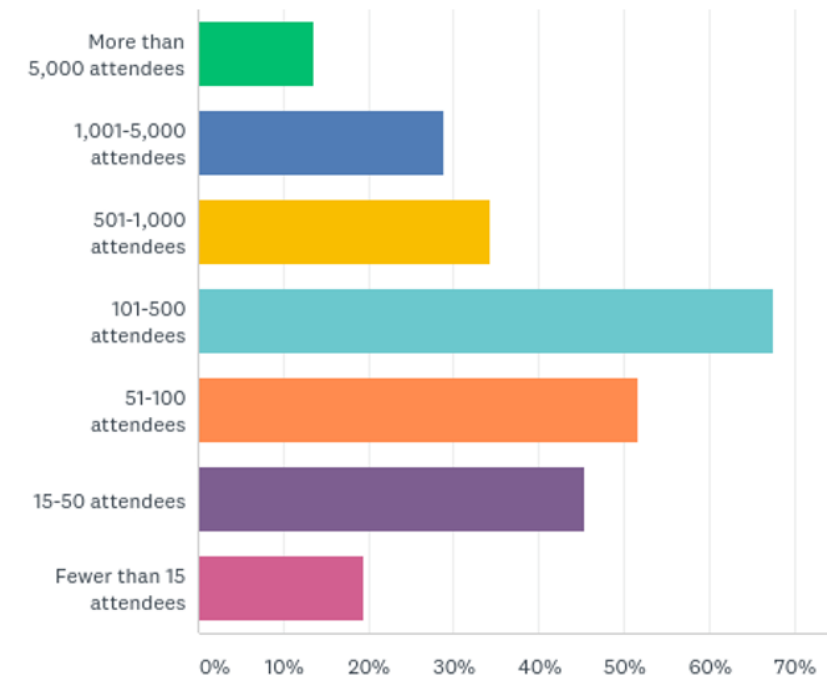
805 Valid Planner Responses



Type

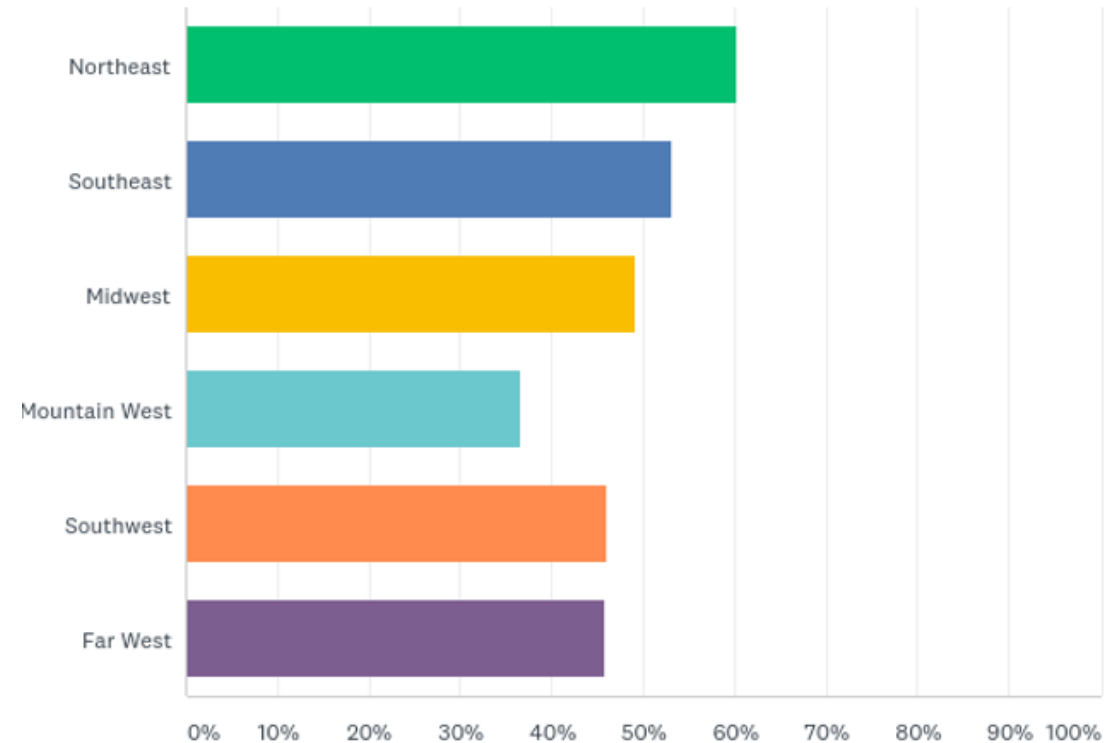
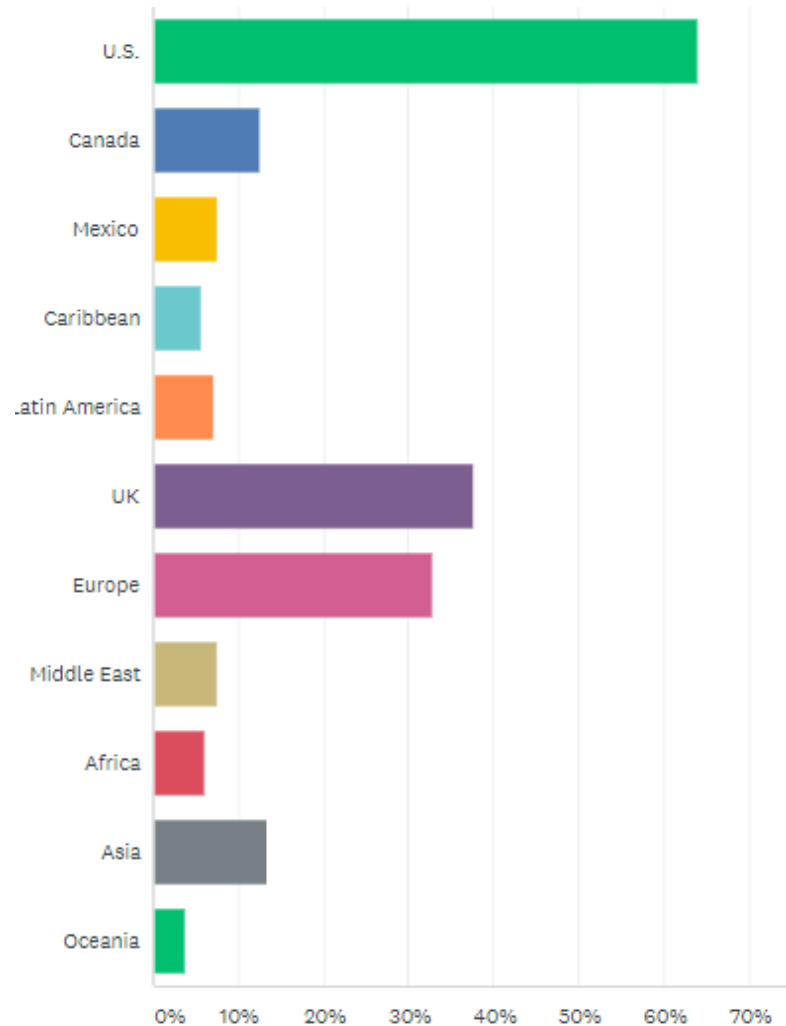


of Meetings



Size of Meeting

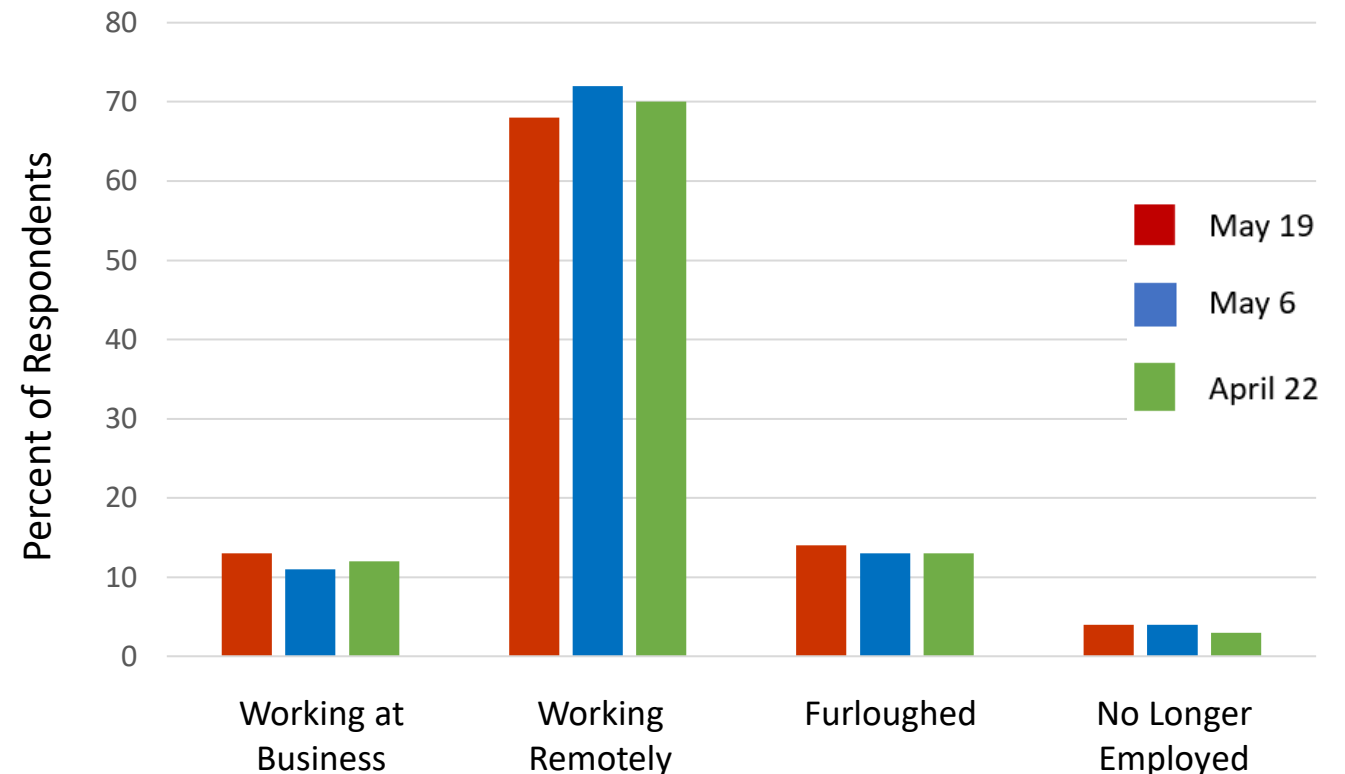
Respondents by Meeting Location



No material change in employment status over the past three weeks, indicating the job market for planner respondents is currently stable.

May 19 Responses

ANSWER CHOICES	RESPONSES	
Working full time at a business location	13.24%	99
Working full time remotely	68.45%	512
Furloughed, I remain employed but I am now working part-time.	7.22%	54
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	2.81%	21
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	4.14%	31
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	3.34%	25
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.	0.80%	6
TOTAL		748

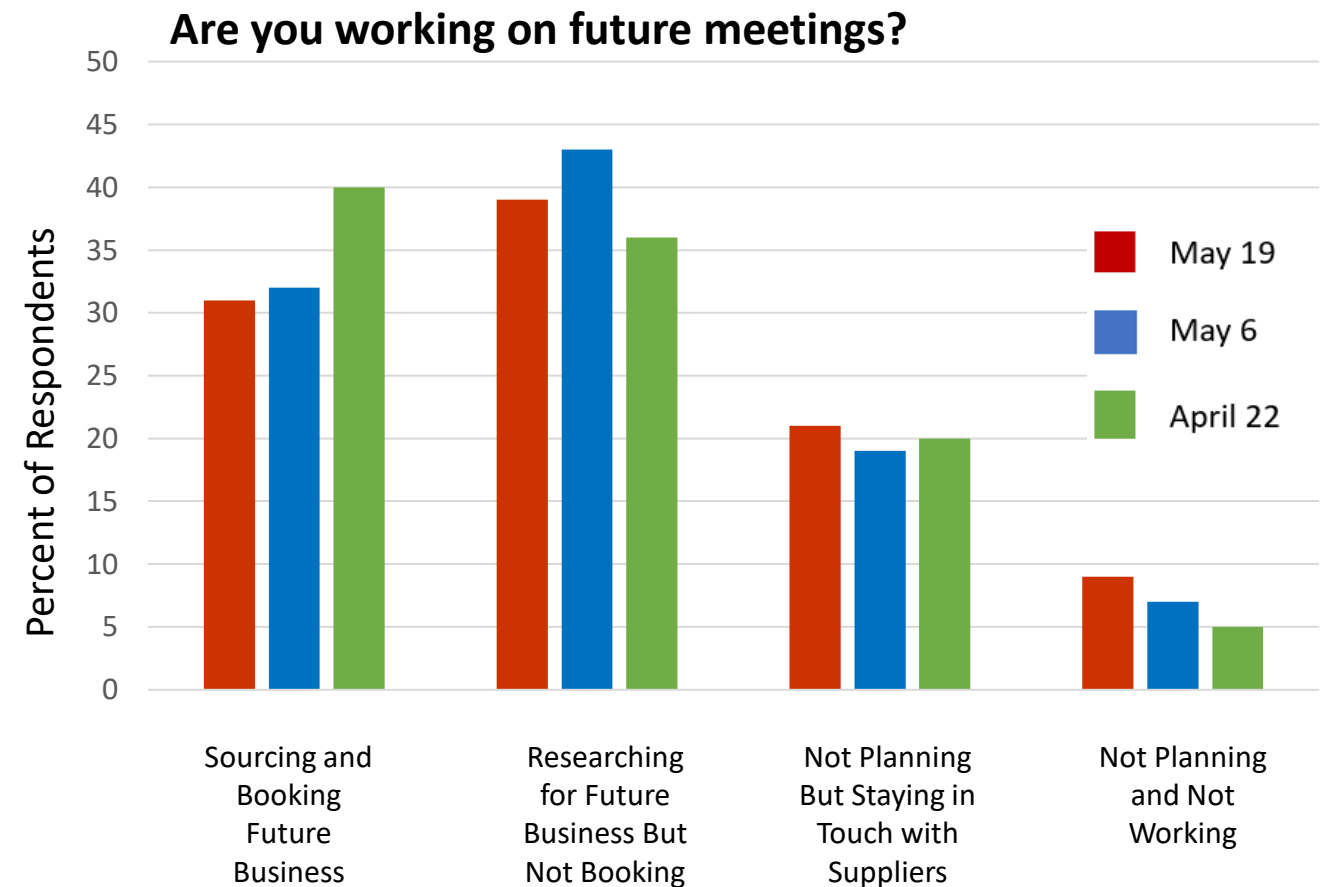


“Looking, but not booking.”

Planner sourcing and booking activity remains stagnant.

May 19 Responses

ANSWER CHOICES	RESPONSES
Yes, sourcing and booking future business	30.60% 168
Researching for future meetings but not booking	39.34% 216
Not planning, but staying in touch with destination and venue partners	21.13% 116
Not planning and not staying in contact at this point	6.19% 34
Not employed	2.73% 15
TOTAL	549

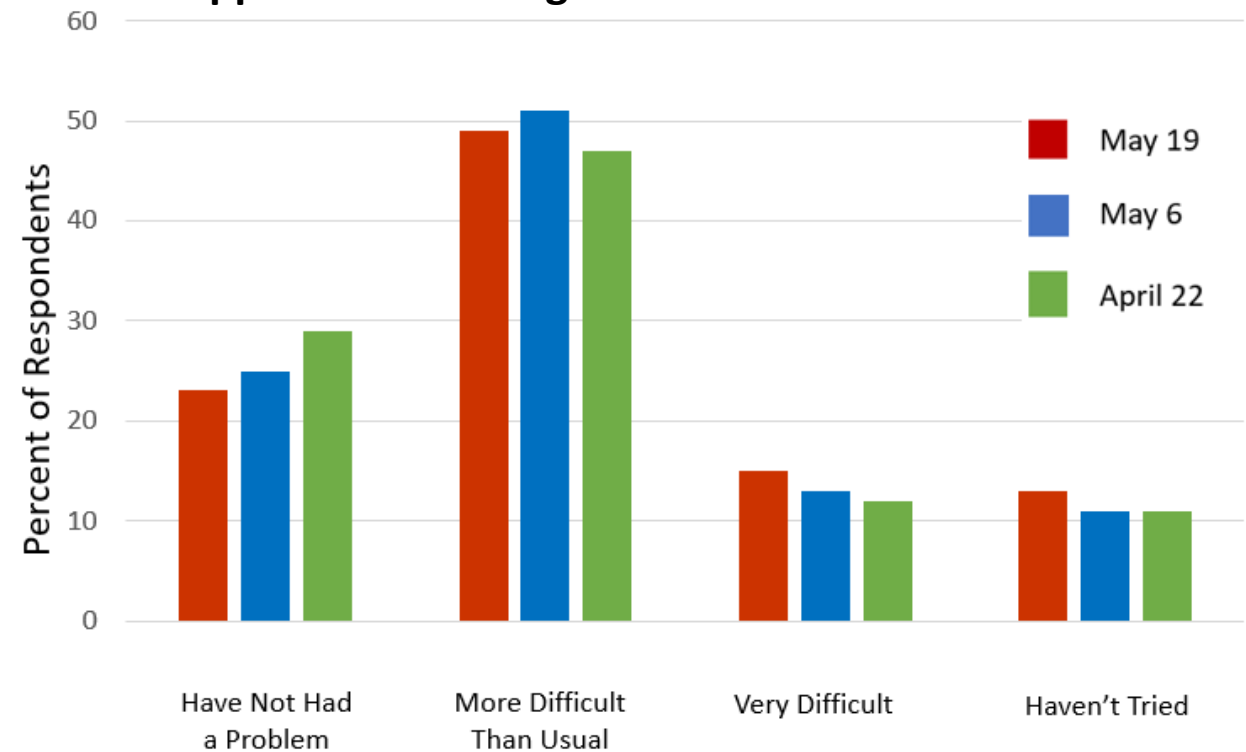


Planners are experiencing problems reaching out to suppliers of meetings services (hotels, venues, DMOs, DMCs, etc.)

May 19 Responses

ANSWER CHOICES	RESPONSES	
I have not had a problem.	22.73%	125
It has been more difficult than usual.	48.91%	269
It has been very difficult.	15.45%	85
I haven't tried.	12.91%	71
TOTAL		550

What is your current experience in reaching out to suppliers of meeting services?

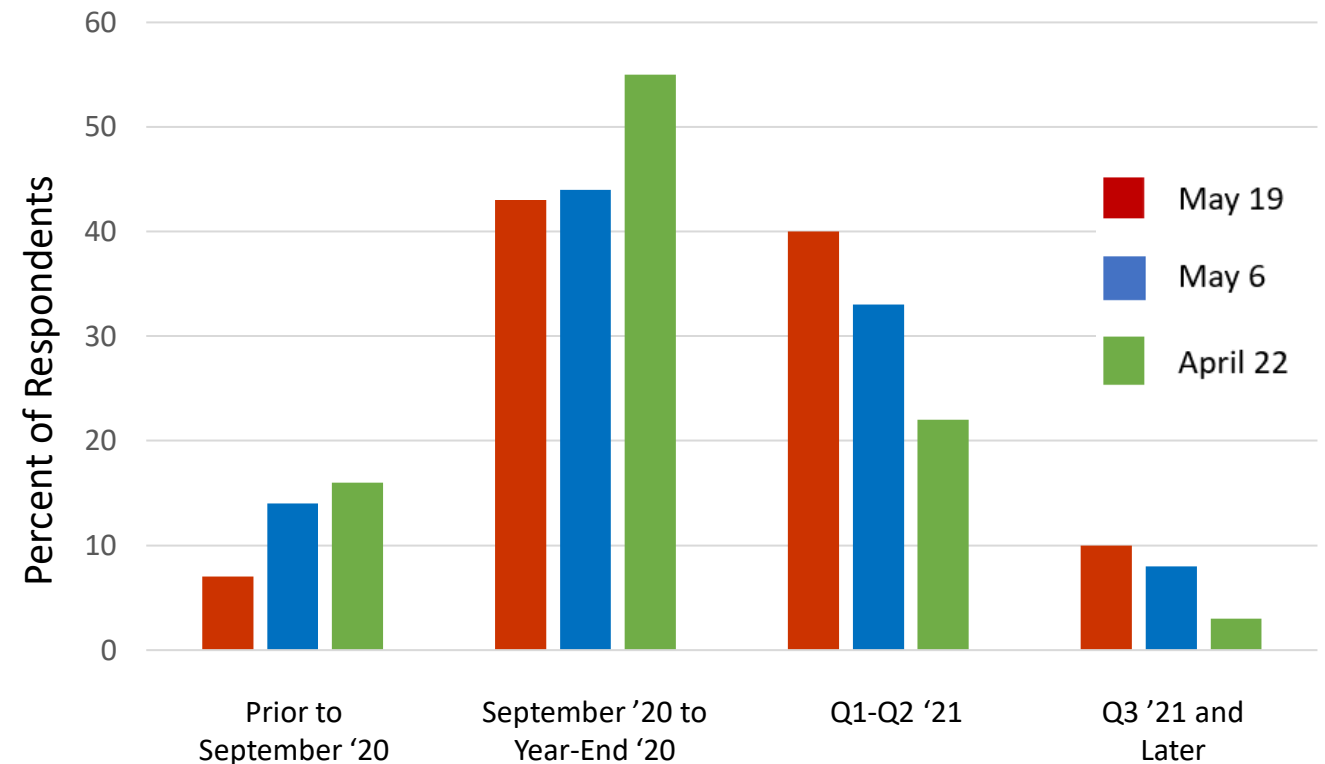


Planners continue to push their rescheduled events into 2021, with a sharp decline in confidence for executing summer events.

May 19 Responses

ANSWER CHOICES	RESPONSES	
Prior to September 2020	6.75%	37
September to Year-End 2020	43.25%	237
Q1 2021	26.64%	146
Q2 2021	13.32%	73
Q3 2021	4.56%	25
Q4 2021	2.19%	12
Q1 2022 and later	3.28%	18
TOTAL		548

When is the earliest you are RESCHEDULING meetings and events?

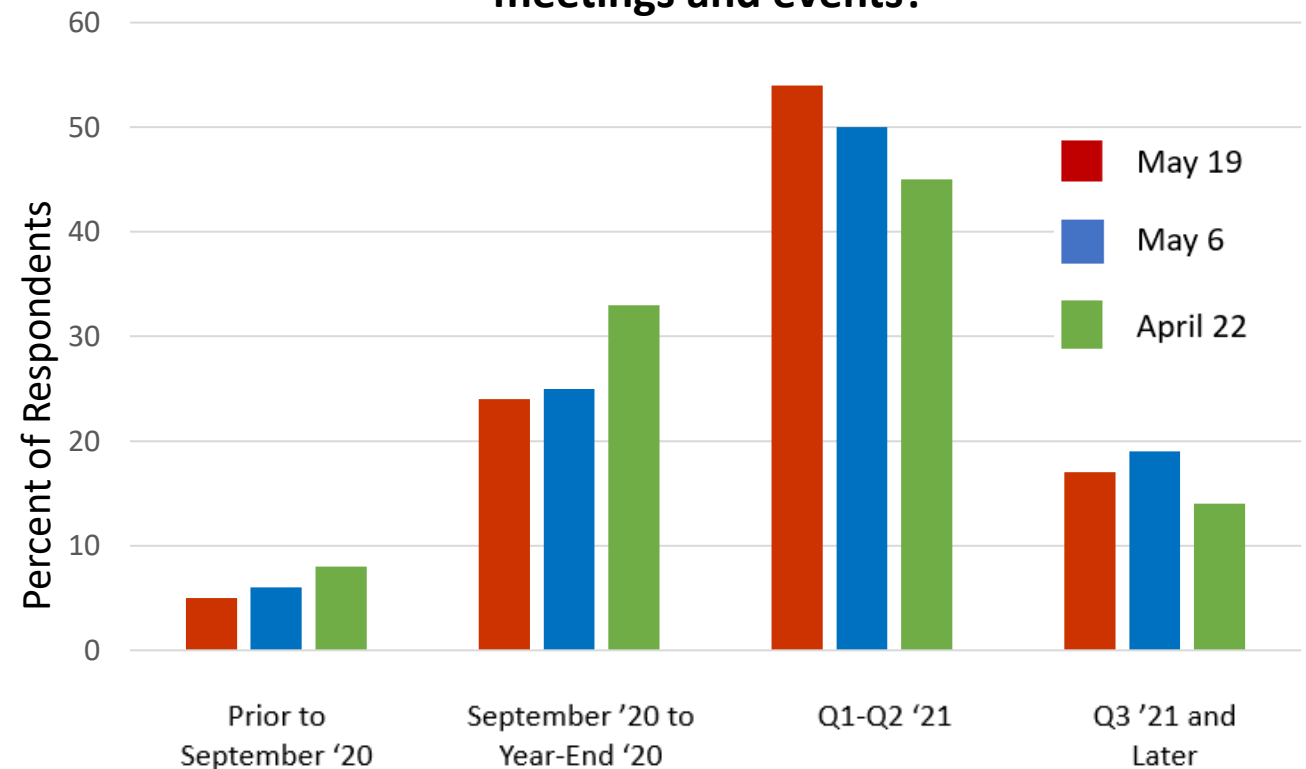


Confidence levels grow for the first half of 2021 for new meetings and events, as well as rescheduled events.

May 19 Responses

ANSWER CHOICES	RESPONSES	
Prior to September 2020	4.76%	26
September to Year-End 2020	23.63%	129
Q1 2021	37.55%	205
Q2 2021	16.85%	92
Q3 2021	5.49%	30
Q4 2021	4.40%	24
Q1 2022 and later	7.33%	40
TOTAL		546

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

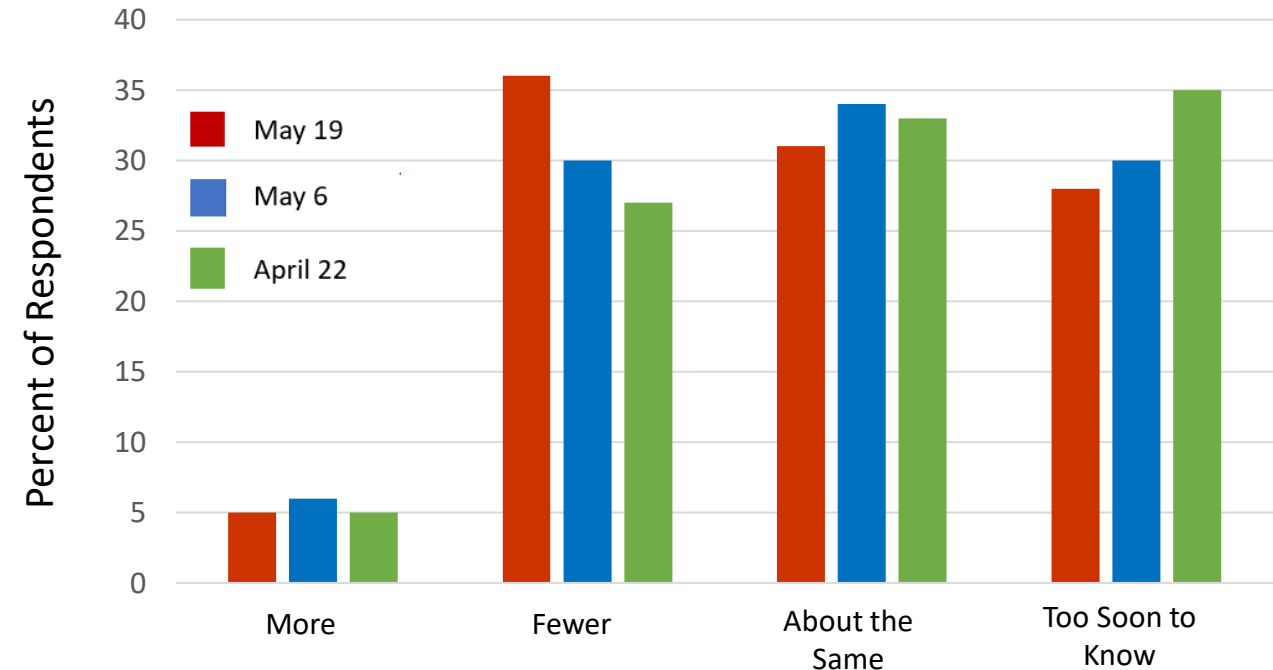


As the impact of the pandemic becomes better understood, planners anticipate they'll be planning fewer meetings post-COVID-19

May 19 Responses

ANSWER CHOICES	RESPONSES	
More	4.53%	25
Fewer	35.87%	198
About the same	31.16%	172
It's too soon to know.	28.44%	157
TOTAL		552

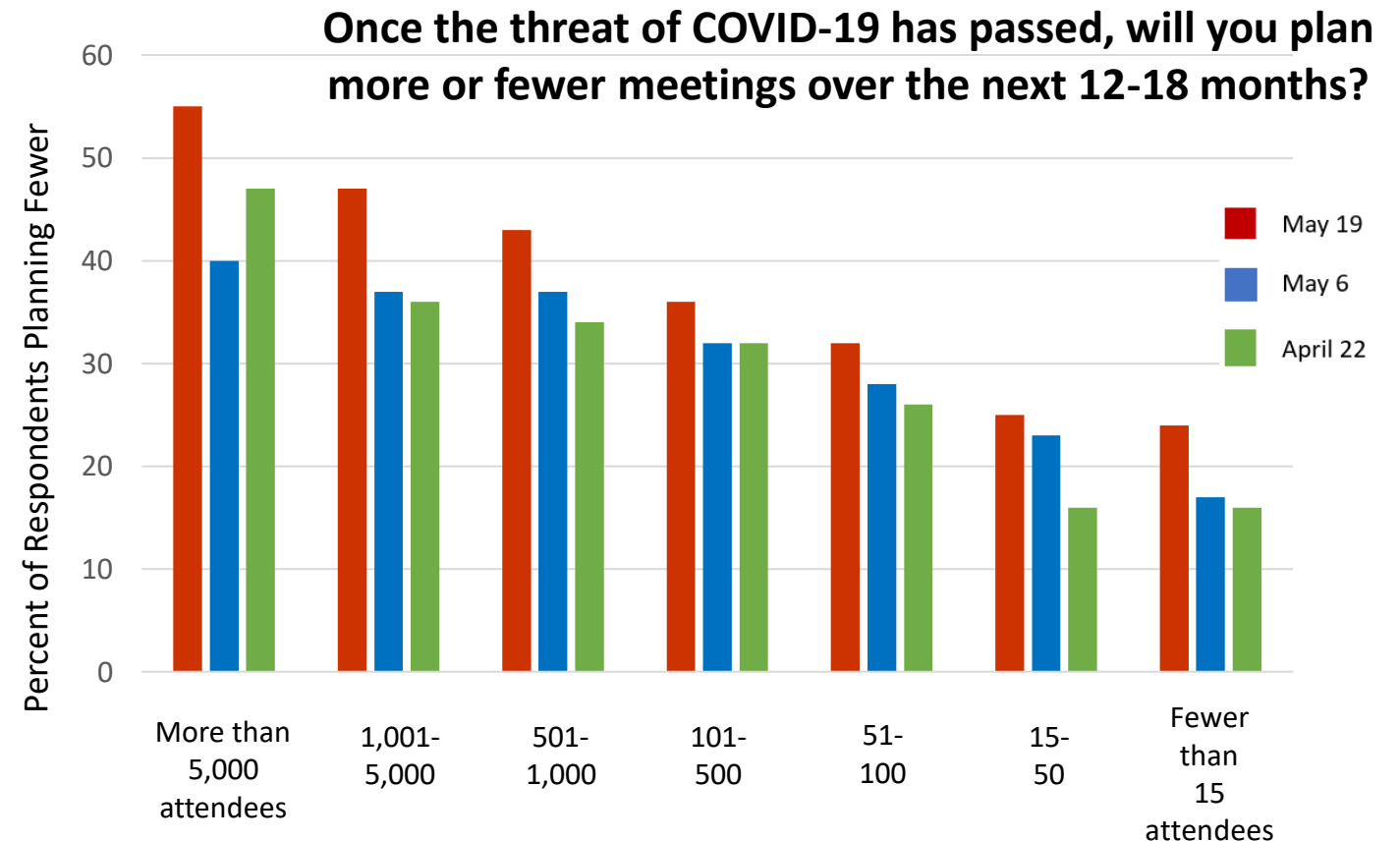
Once the threat of COVID-19 has passed, over the next 12-18 months, will you plan more or fewer meetings?



The larger the meeting, the less likely planners expect to plan them, with confidence declining markedly – for all sizes – over the past month.

May 19 Responses

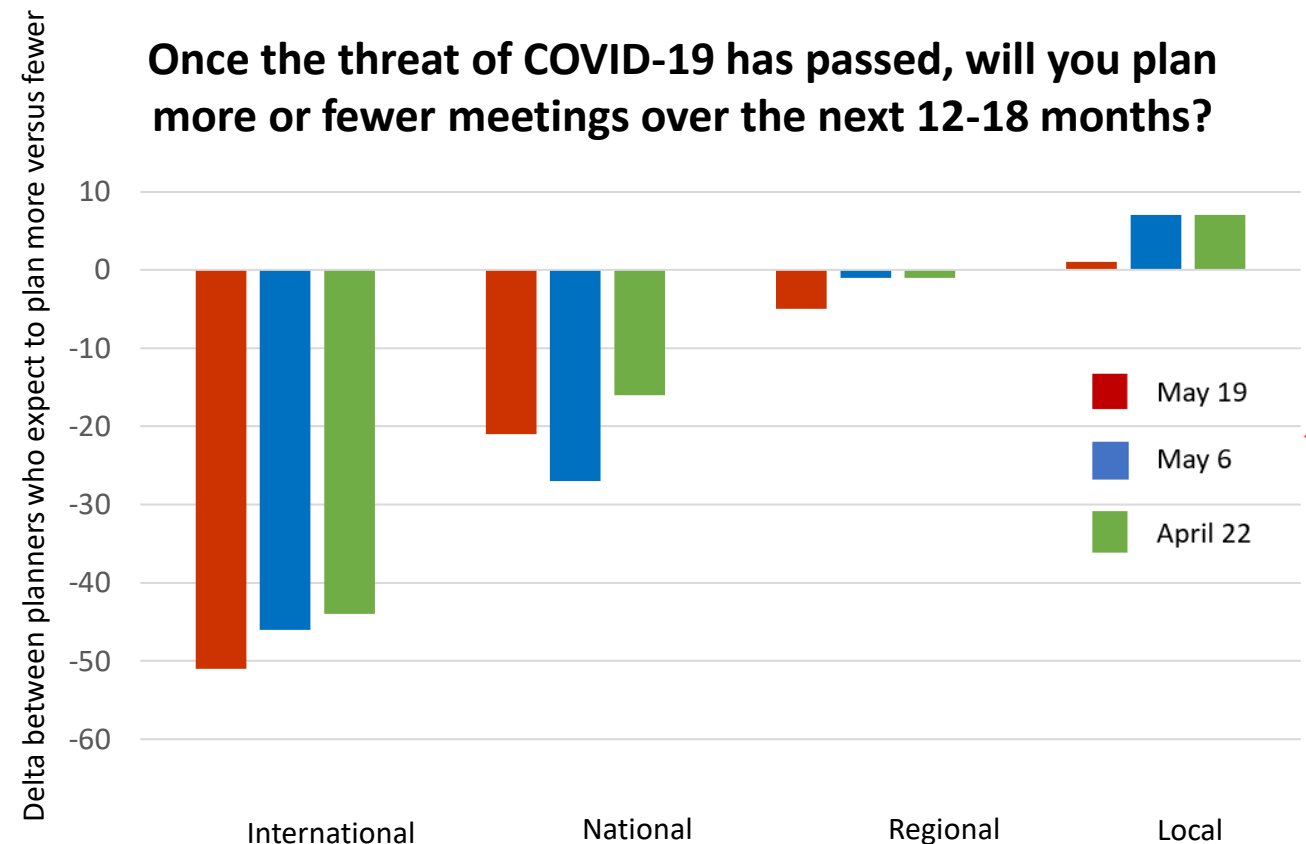
	MORE	FEWER	ABOUT THE SAME	TOTAL
More than 5,000 attendees	2.63% 3	55.26% 63	42.11% 48	114
1,001-5,000 attendees	2.04% 4	47.45% 93	50.51% 99	196
501-1,000 attendees	4.33% 11	42.91% 109	52.76% 134	254
101-500 attendees	6.78% 29	36.21% 155	57.01% 244	428
51-100 attendees	14.49% 60	31.64% 131	53.86% 223	414
15-50 attendees	22.11% 90	25.06% 102	52.83% 215	407
Fewer than 15 attendees	24.91% 68	24.18% 66	50.92% 139	273



The more local the event the likelier, although confidence begins to wane for even local events.

May 19 Responses

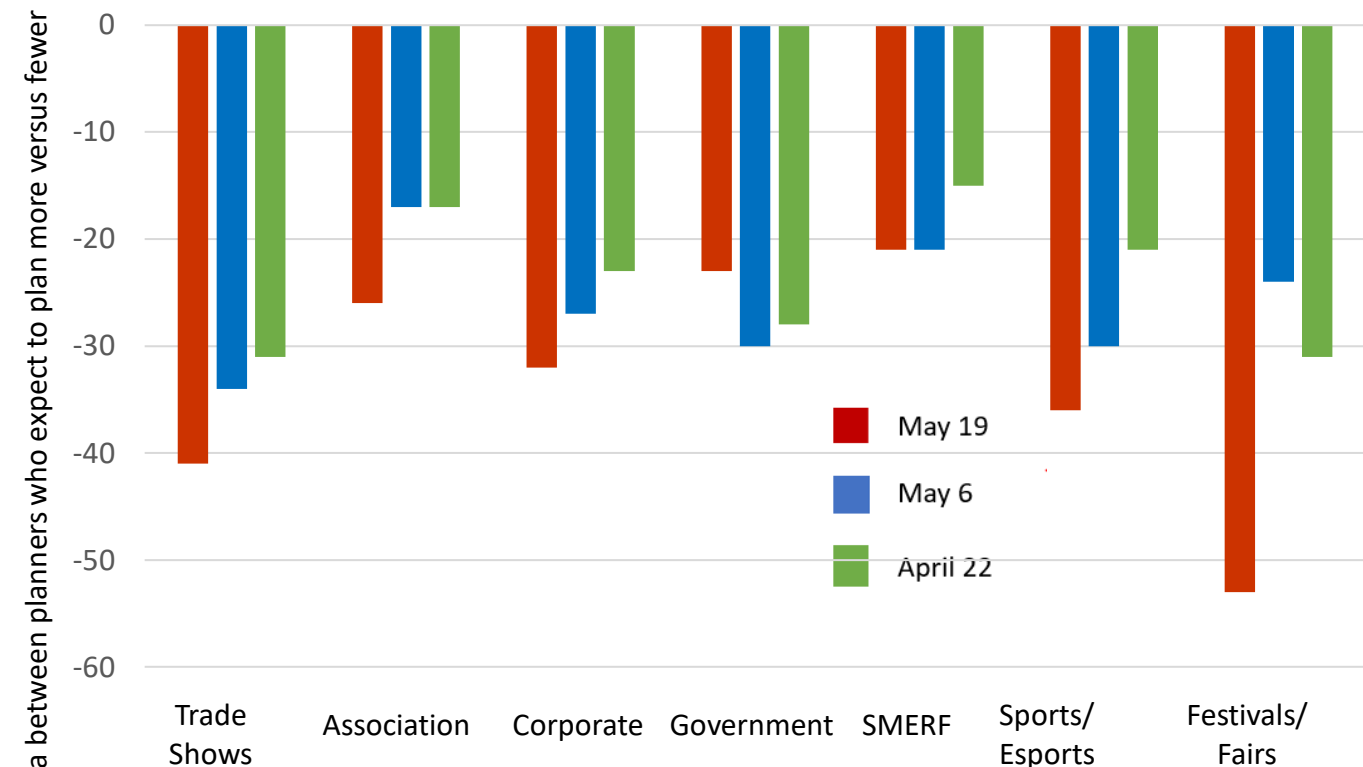
	MORE	FEWER	ABOUT THE SAME	TOTAL
International	4.26% 13	55.41% 169	40.33% 123	305
National	10.84% 45	31.81% 132	57.35% 238	415
Regional	20.53% 77	25.60% 96	53.87% 202	375
Local	24.79% 89	23.68% 85	51.53% 185	359



Confidence for all event types wane, though SMERF and Government events are relatively less impacted.

May 19 Responses

	MORE	FEWER	ABOUT THE SAME	TOTAL
Trade Shows/Exhibitions/Congresses	3.62% 10	44.93% 124	51.45% 142	276
Association	5.49% 13	31.22% 74	63.29% 150	237
Corporate	8.14% 25	40.07% 123	51.79% 159	307
Government	10.34% 9	33.33% 29	56.32% 49	87
Social, Military, Education, Religion, Fraternal	9.52% 12	28.57% 36	61.90% 78	126
Sports/Esports	13.51% 10	50.00% 37	36.49% 27	74
Festivals/Fairs	4.60% 4	57.47% 50	37.93% 33	87

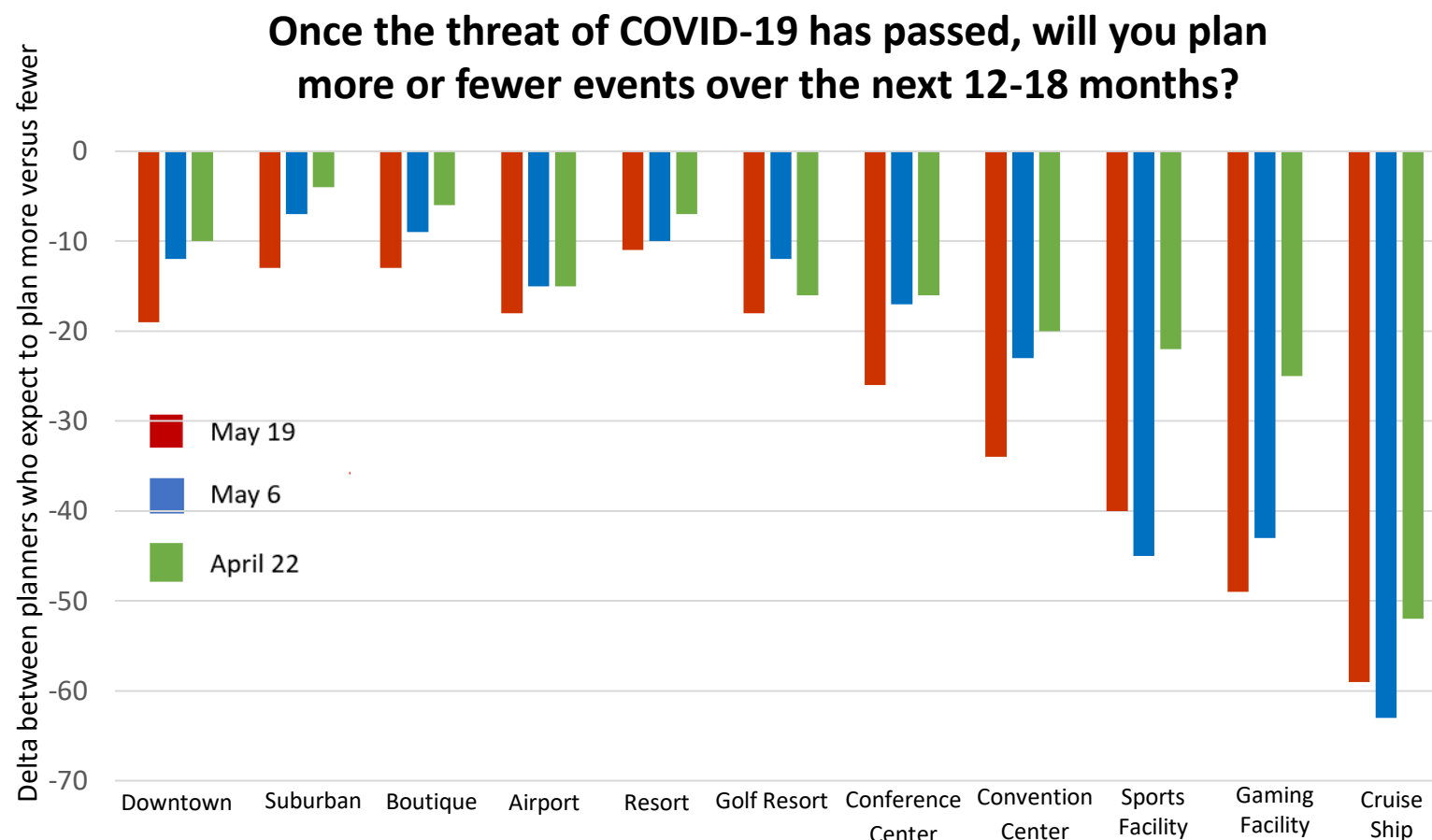


Once the threat of COVID-19 has passed, will you plan more or fewer events over the next 12-18 months?

Resorts, suburban and boutique hotels decline in relative favorability, as more planners expect to plan fewer events across all types of venues.

May 19 Responses

	MORE	FEWER	ABOUT THE SAME	TOTAL
Downtown Hotel	4.41% 19	22.97% 99	72.62% 313	431
Suburban Hotel	10.14% 35	22.61% 78	67.25% 232	345
Boutique Hotel	10.76% 34	23.73% 75	65.51% 207	316
Airport Hotel	9.02% 23	27.06% 69	63.92% 163	255
Resort	12.08% 40	22.66% 75	65.26% 216	331
Golf Resort	8.04% 18	26.34% 59	65.63% 147	224
Conference Center	6.32% 23	31.87% 116	61.81% 225	364
Convention Center	5.48% 16	38.70% 113	55.82% 163	292
Sports Facility/Stadium/Arena	8.97% 14	48.72% 76	42.31% 66	156
Gaming Facility	6.38% 6	55.32% 52	38.30% 36	94
Cruise Ship	5.68% 5	64.77% 57	29.55% 26	88
Other	15.45% 17	20.91% 23	63.64% 70	110

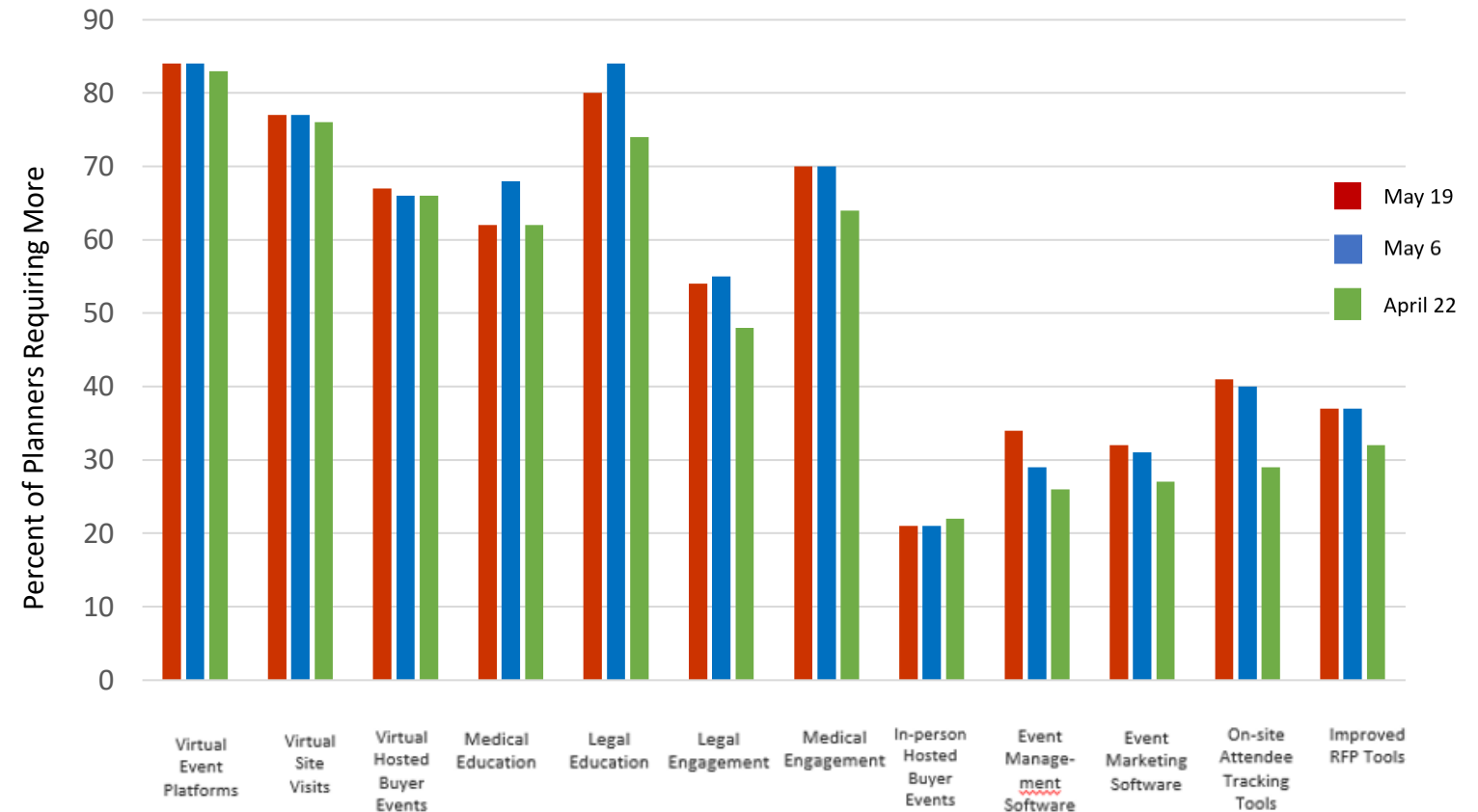


“Virtual” is real, as is the need for legal and medical education/engagement.

May 19 Responses

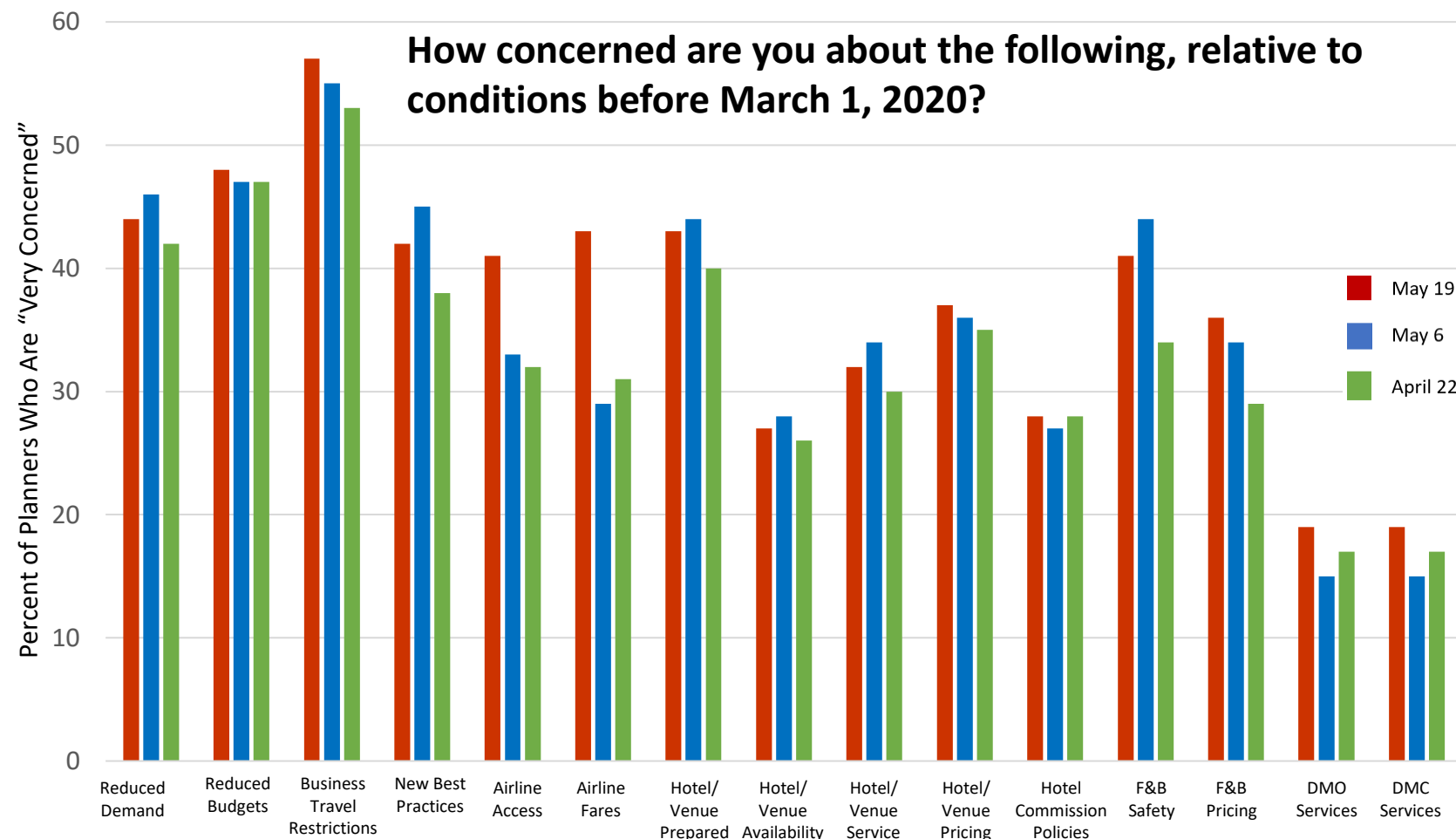
	MORE	FEWER	ABOUT THE SAME	TOTAL	WEIGHTED AVERAGE
Virtual event platforms	84.06% 406	5.38% 26	10.56% 51	483	1.27
Virtual site visits	77.41% 353	6.36% 29	16.23% 74	456	1.39
Education specific to legal matters	62.20% 237	4.20% 16	33.60% 128	381	1.71
Education specific to health/medical safety matters	79.53% 342	2.33% 10	18.14% 78	430	1.39
Engagement of professional legal advisory services	53.62% 200	3.75% 14	42.63% 159	373	1.89
Engagement of health/medical safety advisory services	70.34% 287	2.94% 12	26.72% 109	408	1.56
In-person, hosted-buyer events and fairs to support buying decisions	21.13% 75	35.77% 127	43.10% 153	355	2.22
Virtual hosted-buyer events and fairs to support buying decisions	66.88% 210	10.51% 33	22.61% 71	314	1.56
Event management software	34.02% 133	5.88% 23	60.10% 235	391	2.26
Event marketing software	31.88% 110	6.38% 22	61.74% 213	345	2.30
On-site attendee-tracking tools	40.91% 153	7.75% 29	51.34% 192	374	2.10
Improved RFP tools	37.08% 122	5.47% 18	57.45% 189	329	2.20

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?



Planners are “very concerned” about a lot of things, but there’s increased concern for airline fares, accessibility, and business travel overall.

	VERY CONCERNED	SOMEWHAT CONCERNED	NOT CONCERNED	TOTAL
Reduced demand for in-person meetings and events	44.05% 237	38.48% 207	17.47% 94	538
Reduced meeting and event budgets	47.56% 253	34.59% 184	17.86% 95	532
Travel policy updates restricting business travel	56.92% 296	29.42% 153	13.65% 71	520
New best practices for gatherings	41.62% 221	38.61% 205	19.77% 105	531
Airline accessibility	41.43% 203	37.14% 182	21.43% 105	490
Airline fares	43.33% 211	36.14% 176	20.53% 100	487
Hotel and venue health and safety preparedness	42.56% 223	38.55% 202	18.89% 99	524
Hotel and venue availability	27.20% 142	39.66% 207	33.14% 173	522
Hotel and venue service levels	32.04% 165	34.76% 179	33.20% 171	515
Hotel and venue pricing and rates	37.24% 194	41.46% 216	21.31% 111	521
Hotel commission policies	27.59% 120	34.02% 148	38.39% 167	435
Food-and-beverage safety	40.75% 216	31.51% 167	27.74% 147	530
Food-and-beverage pricing	36.08% 188	39.54% 206	24.38% 127	521
DMO availability and service levels	19.35% 72	35.22% 131	45.43% 169	372
DMC availability and service levels	19.10% 72	33.95% 128	46.95% 177	377

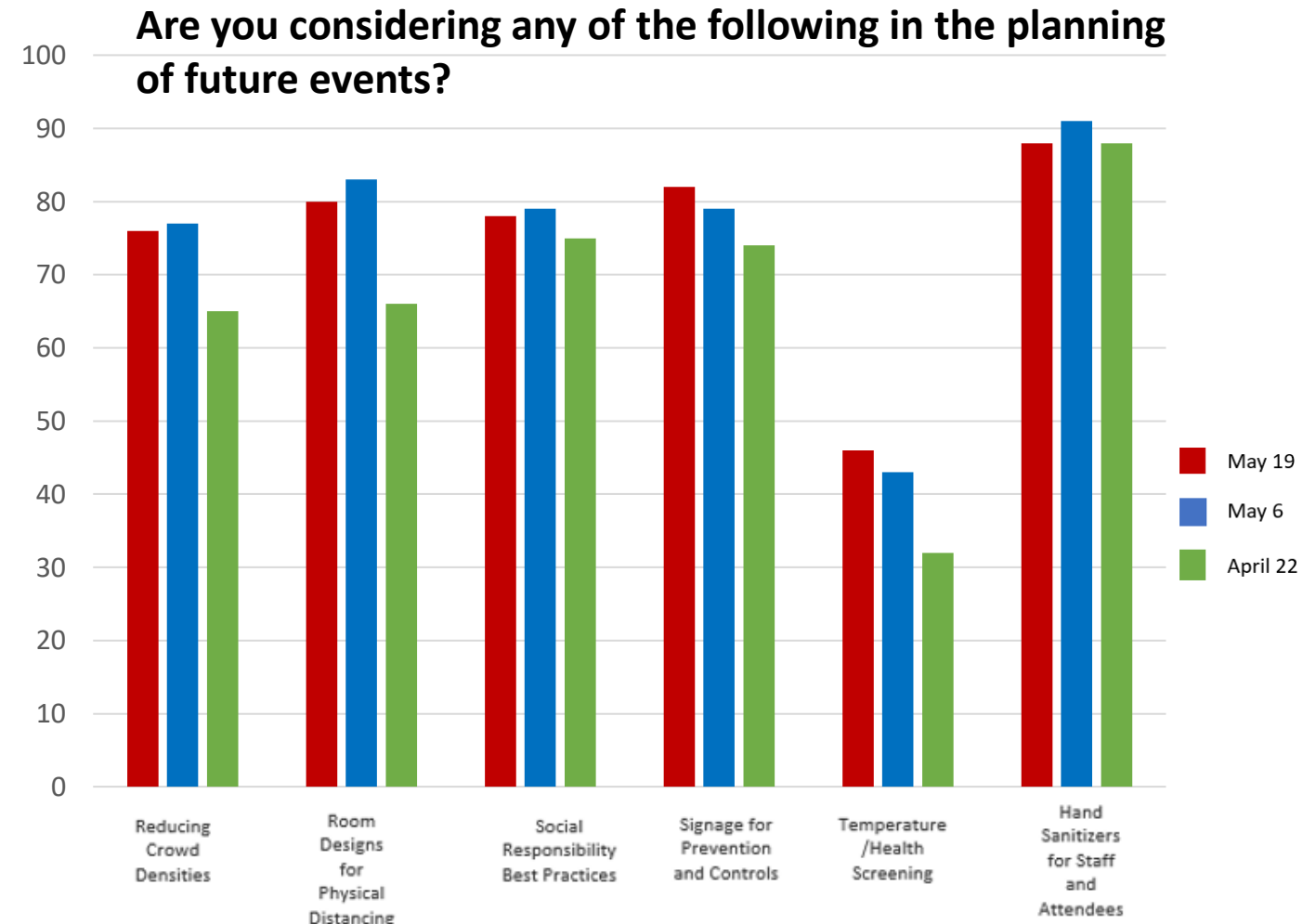


Consideration of requirements remains consistent over the last month.

May 19 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	76.10% 414
Developing meeting room designs to encourage physical distancing	79.60% 433
Putting into place social responsibility best practices, including protocols for attendees who are ill	77.57% 422
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	81.99% 446
Providing temperature/health screening	45.59% 248
Providing hand sanitizer on-site for staff and attendees	88.05% 479
None of the above	4.41% 24
Other (please specify)	5.70% 31
Total Respondents: 544	

Percent of Planners Considering for Future Meetings



In Summary:

- ✓ Looking, not booking, with planners in a “holding pattern”
- ✓ See you next year
- ✓ Larger events not being replaced by smaller events
- ✓ Previous “too soon to know” planners skewing to pessimism
- ✓ Virtual is real
- ✓ More reasons to worry

- “I am frustrated by the overall uncertainty of being able to plan, schedule and commit to future events at this time.”
- “I’m concerned about a reduced desire to travel, about how to run virtual meetings of a highly confidential nature securely, and about how to ensure equality among participants during virtual meetings.”
- “My biggest struggle is trying to keep our executives and board grounded in reality. They are very optimistic that our fall 2020 event will not only take place, but will be just the same as other years. I have been doing my best to provide realistic options and manage expectations, but so far I worry that I am not being heard.”
- “Its impossible to know what the future holds; all we know is that it will be different. Our industry will be better as long as we all collaborate and are aware of our responsibilities to our clients and our industry and not just ourselves.”

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May 19, 2020



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Phased reopening brings uncertainty for meetings, often resulting in a standoff between planners and suppliers.

May 19, 2020



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