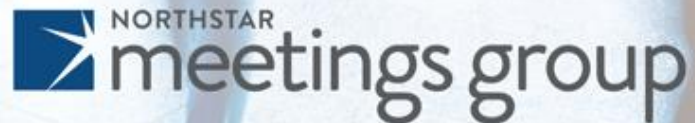




# PULSE SURVEY

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

June 15, 2020



## EXECUTIVE SUMMARY

**Look for live meetings to return this year:** Forty-one percent of meeting planners expect to hold rescheduled events before year-end 2020, according to the results of Northstar Meetings Group's global PULSE Survey.

But while planners are holding out hope, they acknowledge that it won't be easy. "To pull off our upcoming events, managing risk is a much higher priority," said one respondent. "Getting participants and organizations to commit is a higher priority too. We're hopeful that with protocols established and cases under control, we can meet again — even if it's a lot smaller than we expected — before the year is out."

As for newly scheduled events, a growing number of planners — now 79 percent — are choosing dates beginning in 2021, while only 10 percent will wait until 2022 or beyond.

These are among the many signs of optimism expressed by the 484 respondents to the PULSE Survey, which tracks how the global pandemic has affected meeting planners, including their job status, business plans and projections for the future of their events.

As many states loosen restrictions, more planners — 20 percent — are back in their offices. While a consistent 84 percent of respondents are working full-time, 13 percent remain on furloughs and five percent have left the industry or are unemployed.

Following are other highlights from the June 15 PULSE Survey.

### **Still Hesitant to Book**

This week's findings show a slight decrease, to 36 percent, in the number of planners booking future business, and a corresponding rise in those researching for future business but not signing contracts (39 percent).



## PULSE SURVEY



### **More Difficulty Reaching Suppliers**

Two-thirds (67 percent) of respondents are finding it harder than usual to reach suppliers, with an uptick in those calling their experience "very difficult" (55 percent).

### **Wanted: Relaxed Cancellation Terms**

Consistent with previous results, 25 percent of planners anticipate that contracts will allow for cancellation without penalty, and a growing percentage (up from 46 to 51 percent) expect that cancellation terms will be more forgiving when they book future events.

### **Fewer Meetings in the Future**

One-third of respondents expect they'll be planning fewer events after the threat of COVID-19 is behind us, yet results show a slight uptick, to 8 percent, of those who think they'll plan more events going forward, and a decline (from 37 to 34 percent) in those who expect event volume to decrease.

### **Strong Outlook for Small, Local Events**

While respondents consistently anticipate a decline in the volume of international and national events, those dips have improved from previous lows. At the same time, a growing number expect a rise in the number of local events they will plan post-COVID-19.

In terms of event size, the greatest gains are expected in small meetings of 15 to 50, followed by even smaller gatherings of fewer than 15 participants.

## **Bullish on Resorts and Boutique Hotels**

For the first time since the pandemic began, two types of properties — boutique hotels and resorts — are expected to host more business when the threat is behind us than before the crisis.

In all other venue categories, meetings business is projected to be lower in the future. However, results show significantly softer declines in nearly all venue categories, with the greatest improvement in gaming and sports facilities.

## **Seeking Medical Expertise**

In terms of needed products and services, planners' priorities are virtual event platforms, medical education and medical experts, all cited by nearly 80 percent of respondents. This week's findings show a notable rise in interest in attendee-tracking tools, noted by 57 percent of planners.

## **Top Worry: Travel Restrictions**

More than half of respondents fear that business-travel restrictions will prevent people from attending meetings and events, followed closely by concerns about reduced meeting and event budgets, food-and-beverage safety and F&B prices.

## **Prevailing Safety Measures**

More planners are onboard with safety-minded changes. Among the measures they'll put in place to reduce the spread of disease, results show an uptick in every category — with the largest gains in designing spaces to allow physical distancing (cited by 88 percent) and plans to implement temperature checks or other health-screening measures (58 percent).



## **Weighing Virtual-Event ROI**

Confidence is mixed on the effectiveness of digital event platforms. Overall, planners believe such meetings are likely to satisfy attendees, but they are less confident about the value proposition for sponsors.

## **In Their Words**

Verbatim comments from survey respondents shed more light on current sentiments. Among the contributions:

"I will consider looking at more secondary and other markets instead of big cities, as long as transportation to/from is adequate."

"With large meetings industry conferences like IMEX and CONNECT cancelling, it's hard to convince clients that meetings will be safe and that they should move forward on their face-to-face events."

"The uncertainty is unsettling. It will take several years to build the level of trust in having safe and effective in-person events."

"In truth, between budget cuts and COVID-19 fears, most of our delegates will not travel until there is a vaccine."

PULSE SURVEY



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

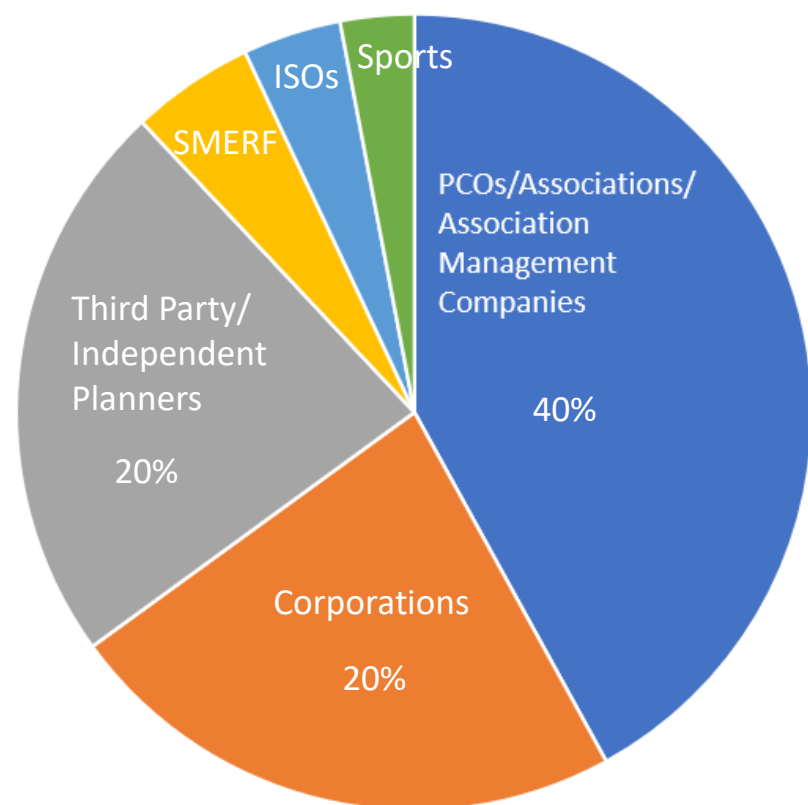
WEDNESDAY, JUNE 17, 2020



**NORTHSTAR**  
MEETINGS GROUP

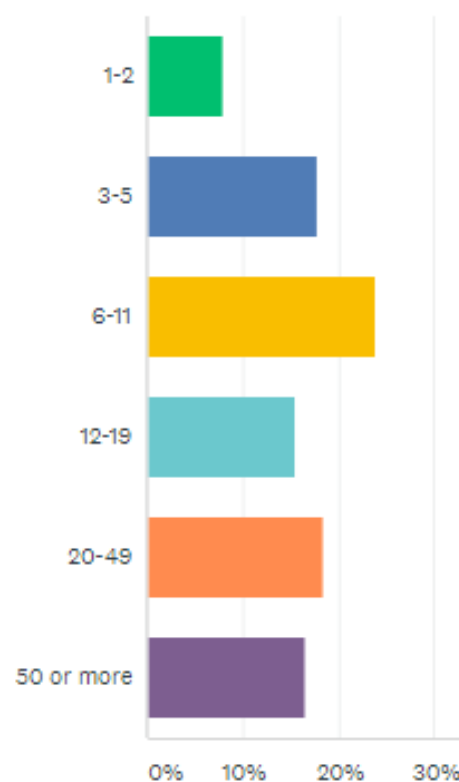
# Respondents By Type, Volume and Size

484 Valid Planner Responses

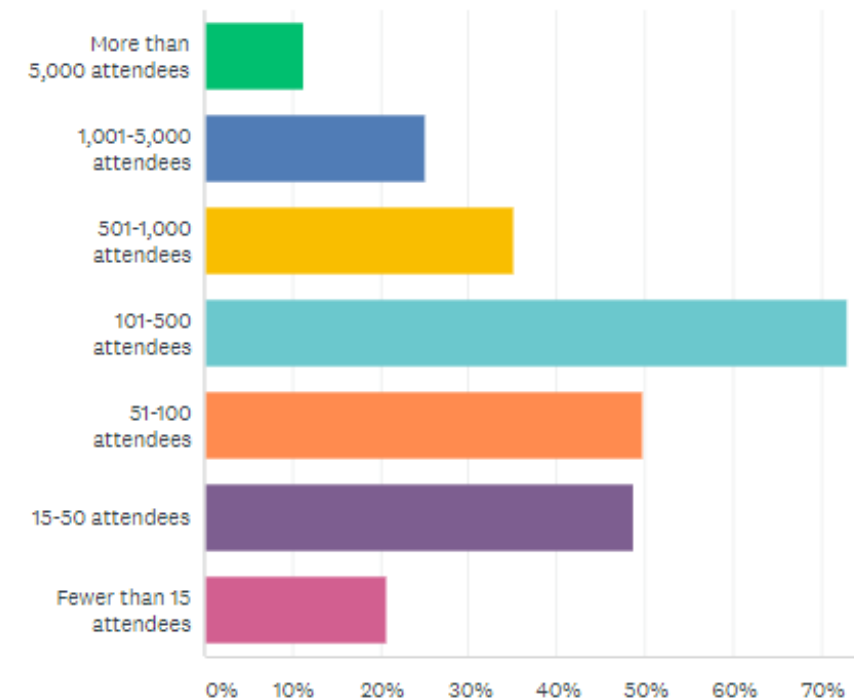


Type

June 17, 2020



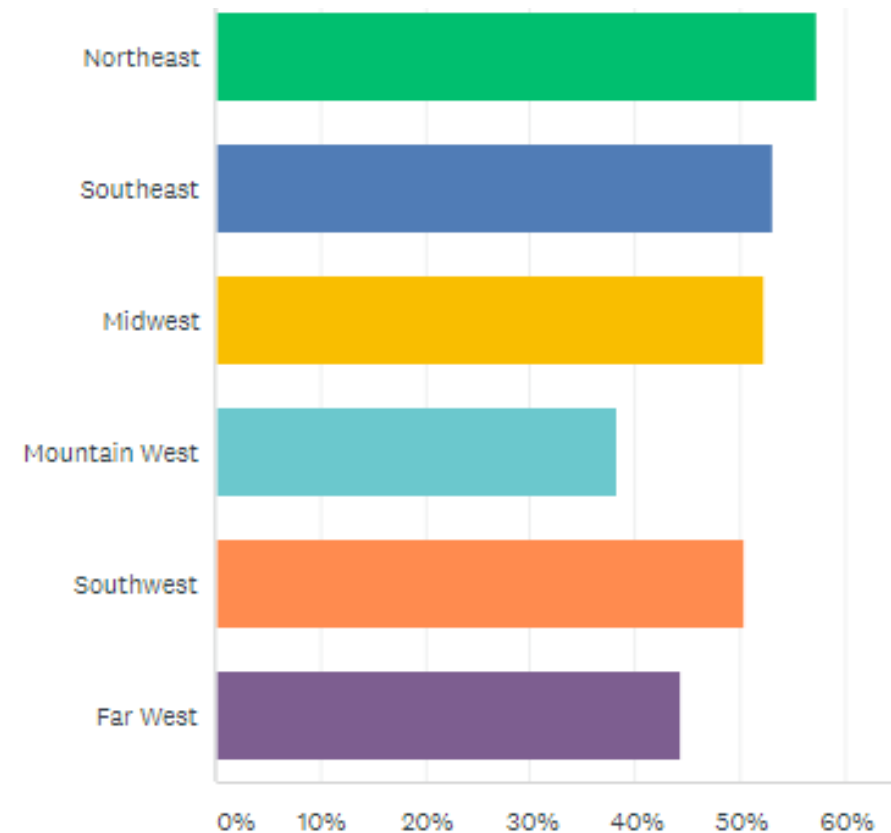
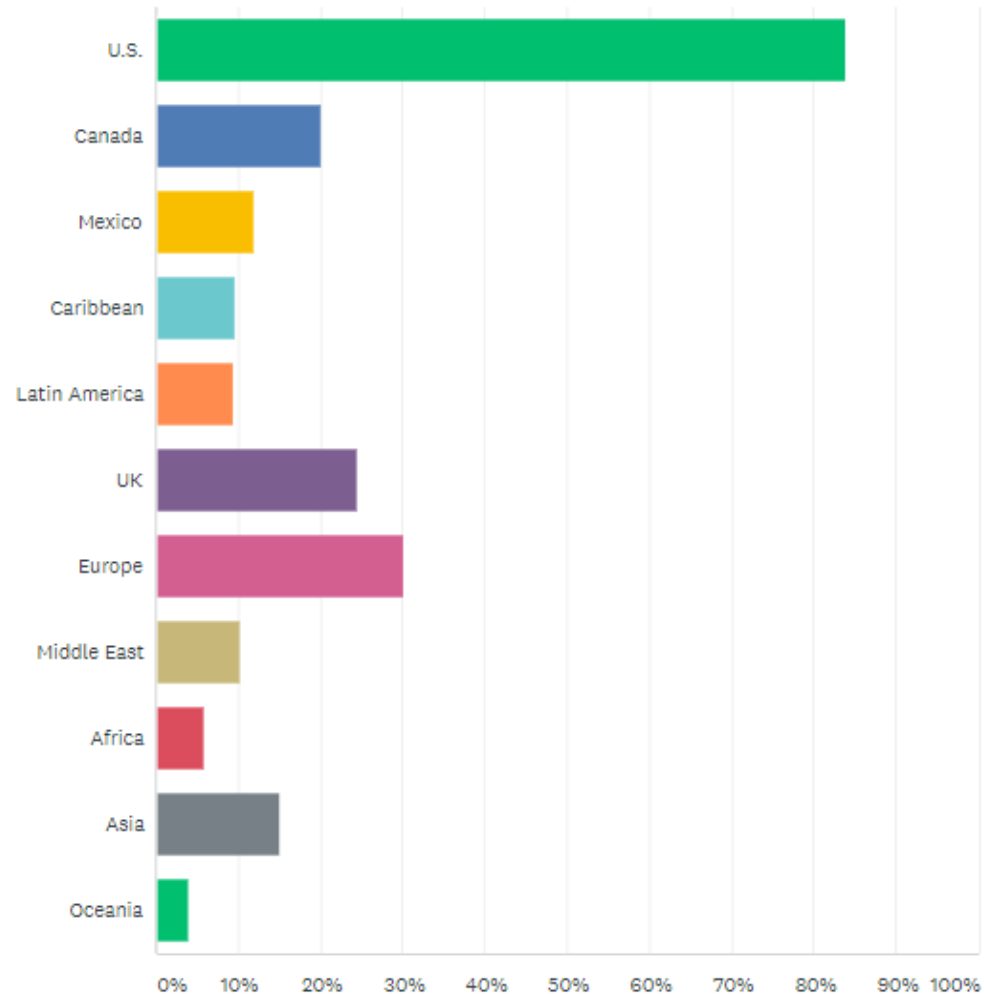
# of Meetings



Size of Meeting



# Respondents by Meeting Location

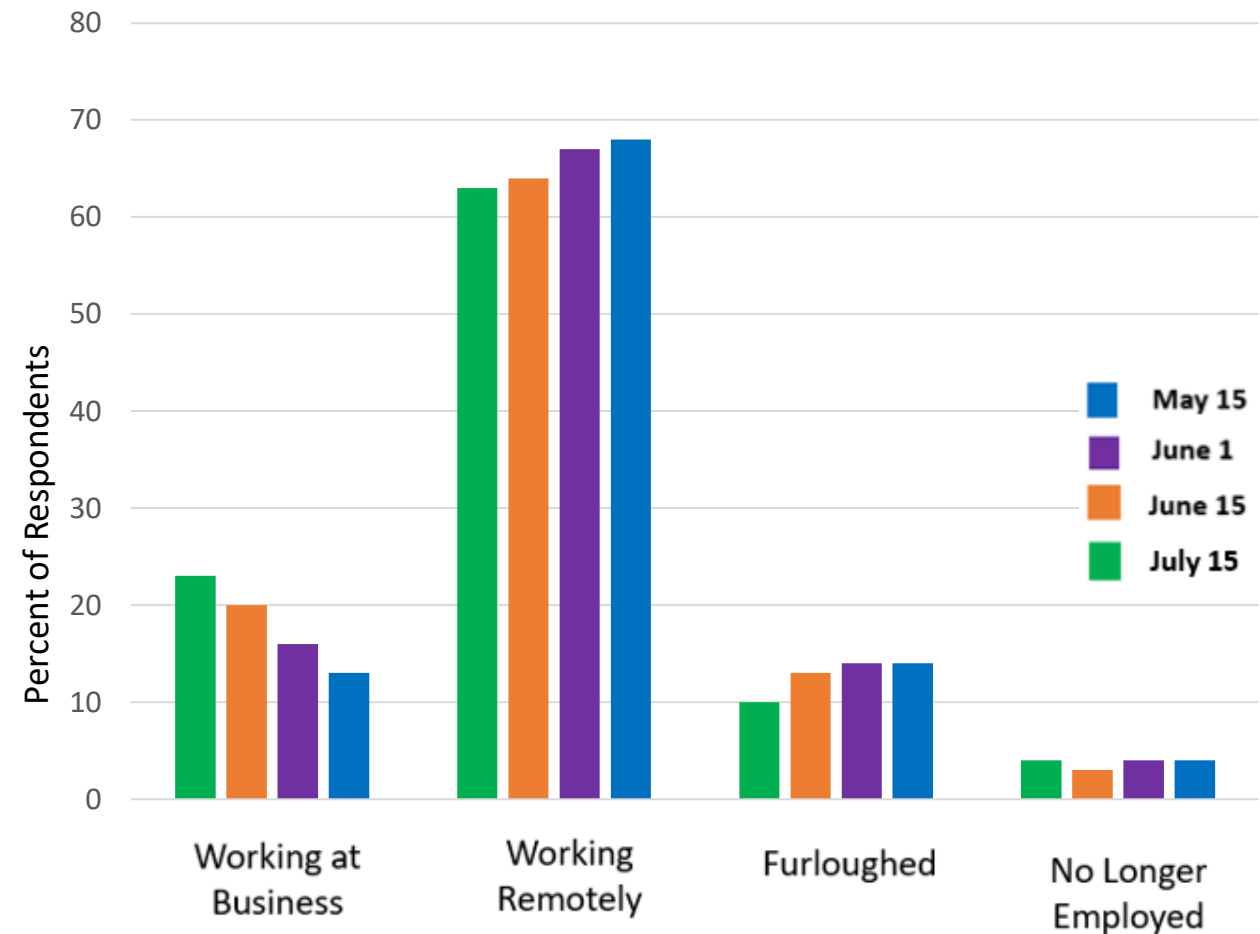




## Planners continue to return to their business locations, keeping pace with previous gains since mid-May

### July 15 Responses

ANSWER CHOICES	RESPONSES
Working full time at a business location	22.70% 230
Working full time remotely	63.47% 643
Furloughed, I remain employed but I am now working part-time.	5.63% 57
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	2.27% 23
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	2.37% 24
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	2.76% 28
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.	0.79% 8
TOTAL	1,013

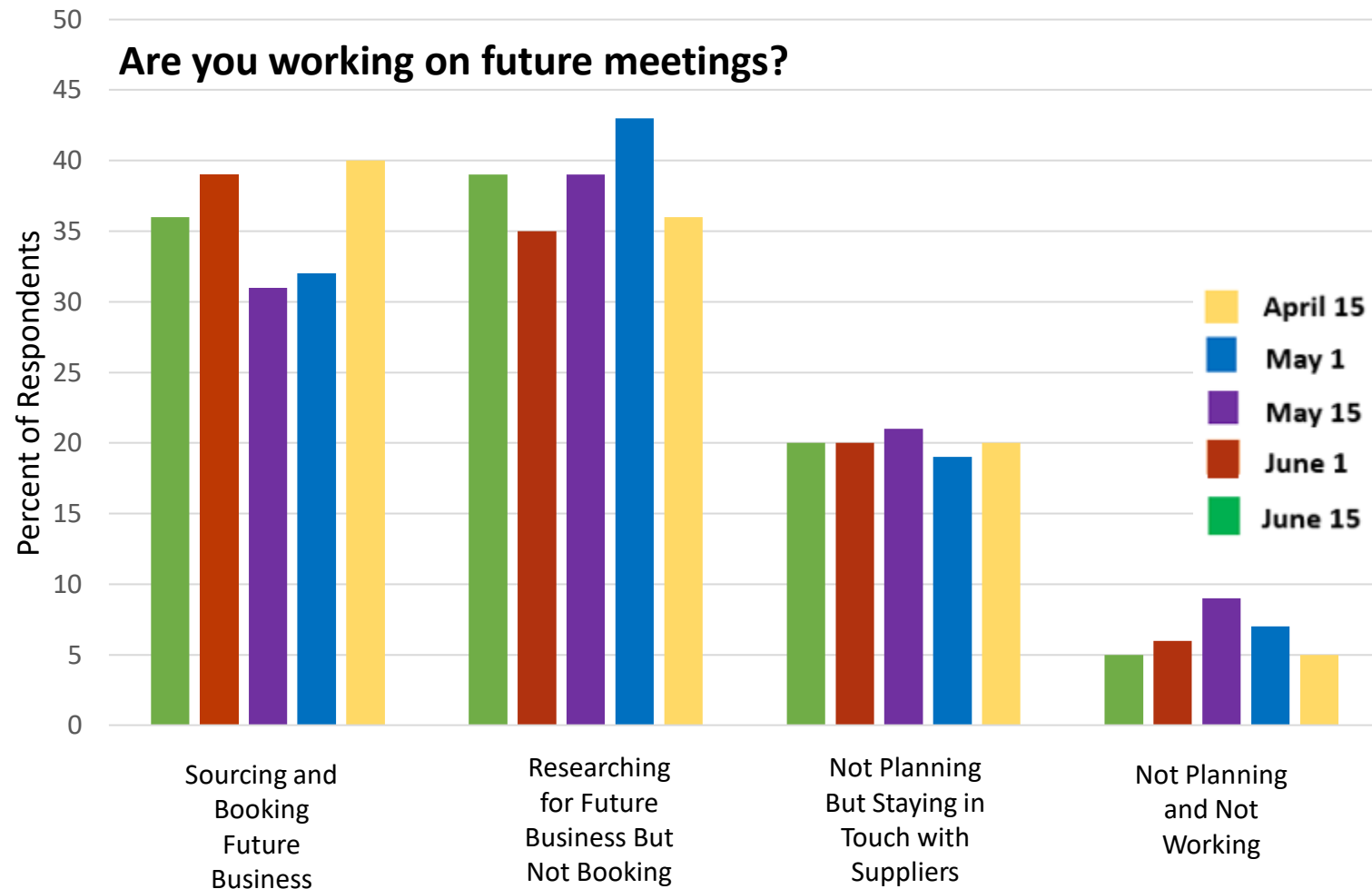


## Booking vs. Looking – Hesitancy Remains

### Momentum from earlier in the month has slowed over the past two weeks

#### June 15 Responses

ANSWER CHOICES	RESPONSES
▼ Yes, sourcing and booking future business	35.61%
▼ Researching for future meetings but not booking	39.17%
▼ Not planning, but staying in touch with destination and venue partners	20.18%
▼ Not planning and not staying in contact at this point	3.86%
▼ Not employed	1.19%



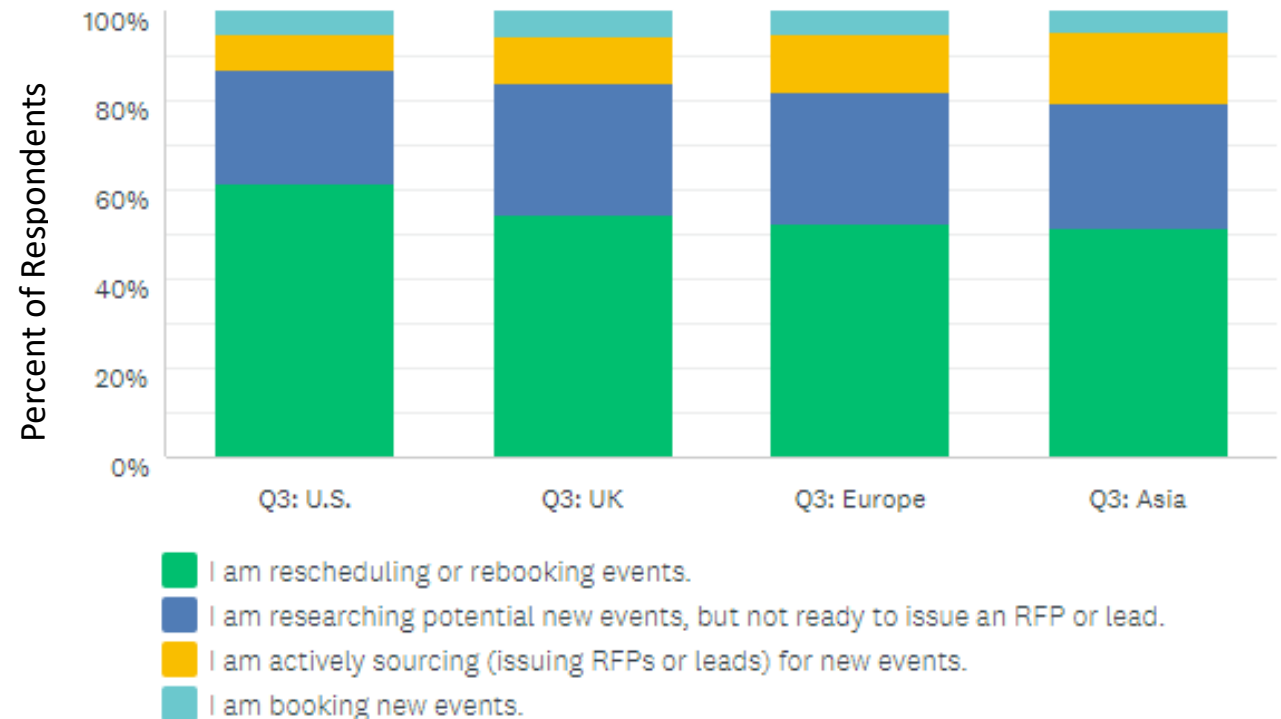
## Booking vs. Looking – Hesitancy Remains

### US planners more inclined to be rebooking

What is your current primary focus?  
Are you rescheduling, booking, or researching?

#### July 14 Responses

	I AM RESCHEDULING OR REBOOKING EVENTS.	I AM RESEARCHING POTENTIAL NEW EVENTS, BUT NOT READY TO ISSUE AN RFP OR LEAD.	I AM ACTIVELY SOURCING (ISSUING RFPs OR LEADS) FOR NEW EVENTS.	I AM BOOKING NEW EVENTS.	TOTAL
Q3: U.S.	61.40% 280	25.44% 116	8.11% 37	5.04% 23	81.43% 456
Q3: UK	54.73% 81	29.05% 43	10.81% 16	5.41% 8	26.43% 148
Q3: Europe	52.60% 81	29.22% 45	12.99% 20	5.19% 8	27.50% 154
Q3: Asia	51.56% 33	28.13% 18	15.63% 10	4.69% 3	11.43% 64

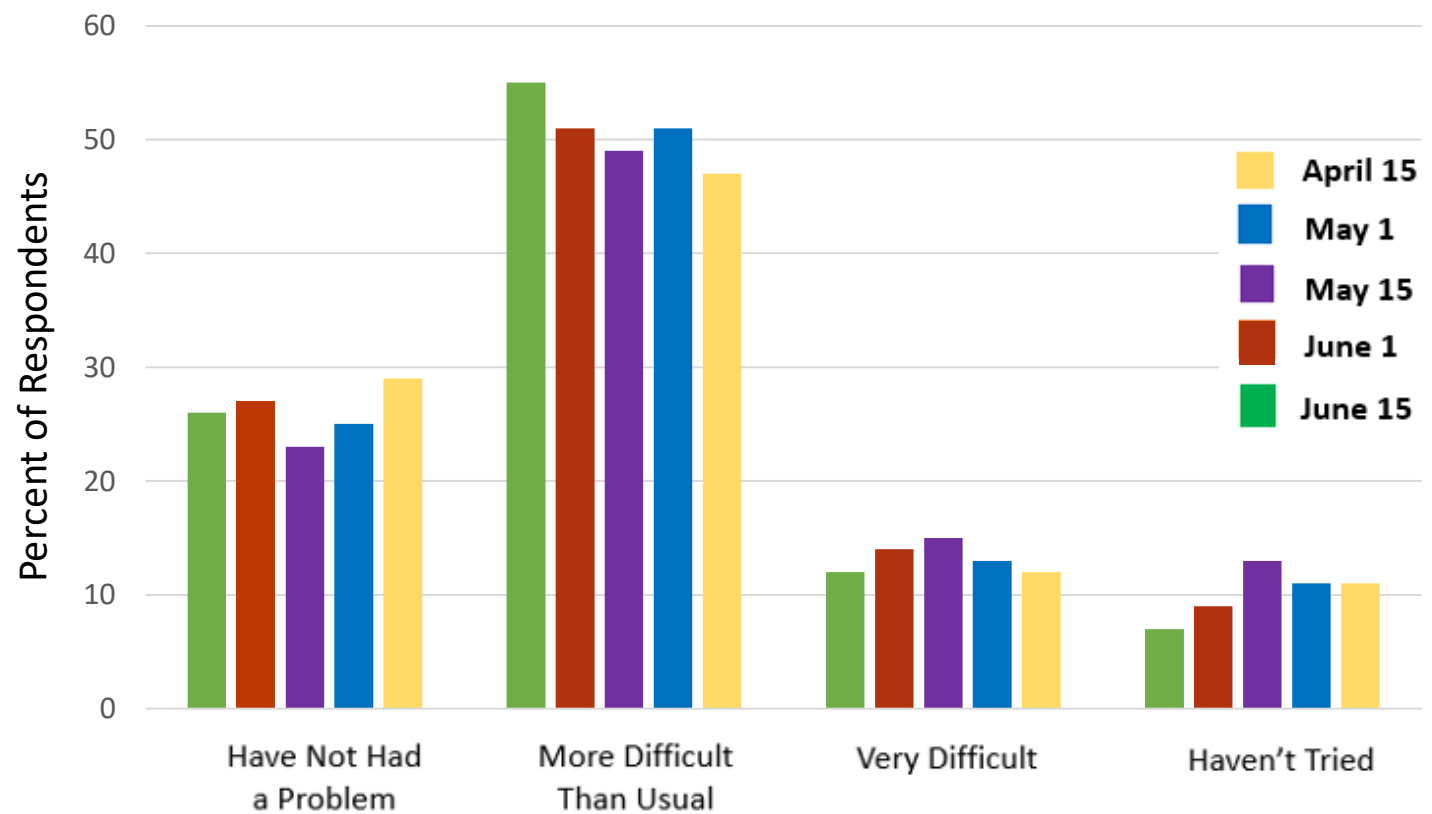


# As more planners reach out to suppliers, more report difficulties

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

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ I have not had a problem.	25.89%
▼ It has been more difficult than usual.	55.36%
▼ It has been very difficult.	11.61%
▼ I haven't tried.	7.14%



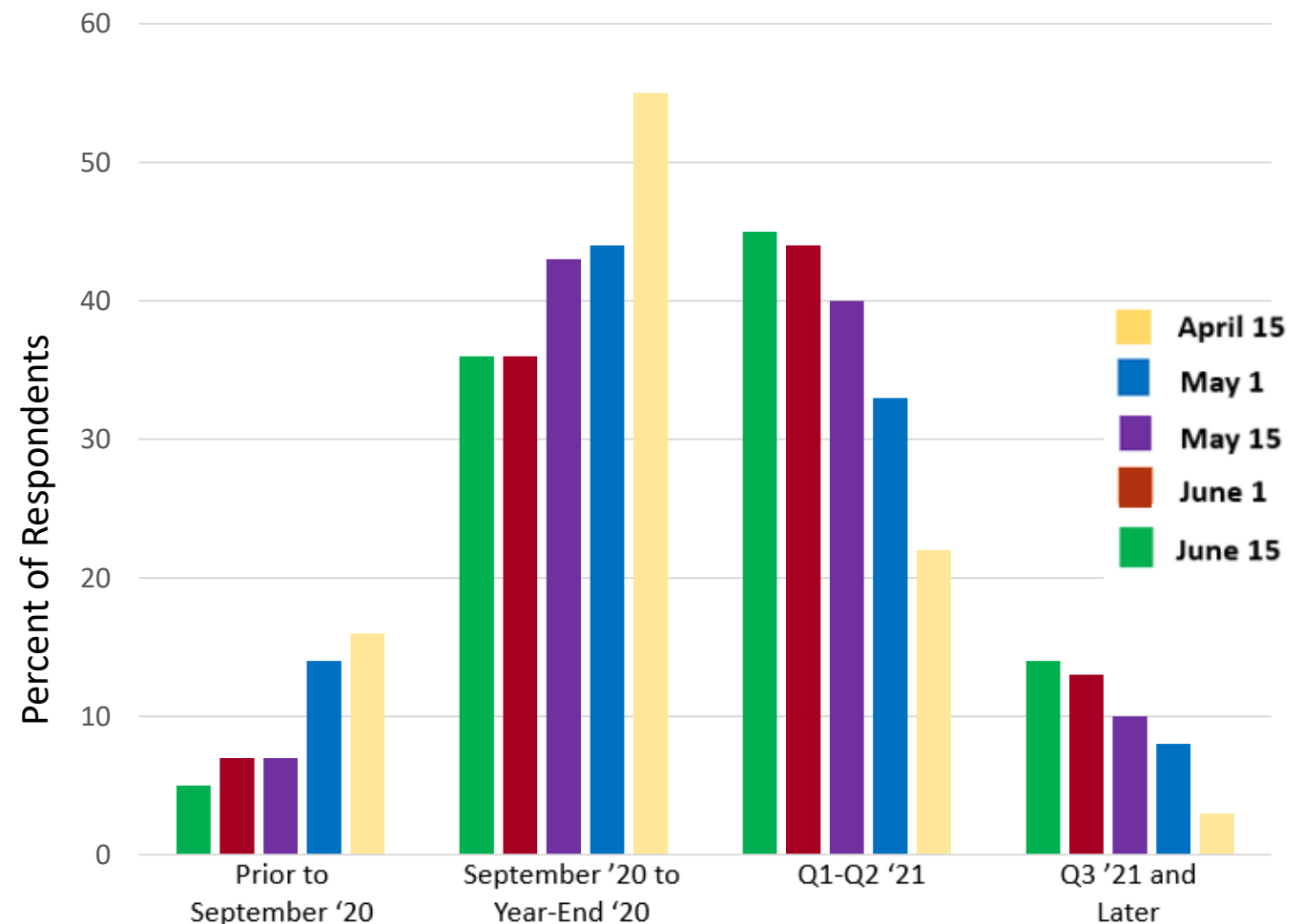


## 4 in 10 planners expect to actualize rescheduled events before year-end

### When is the earliest you are scheduling RESCHEDULED meetings and events?

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ Prior to September 2020	5.09%
▼ September to Year-End 2020	35.63%
▼ Q1 2021	26.35%
▼ Q2 2021	18.56%
▼ Q3 2021	8.98%
▼ Q4 2021	2.69%
▼ Q1 2022 and later	2.69%
TOTAL	

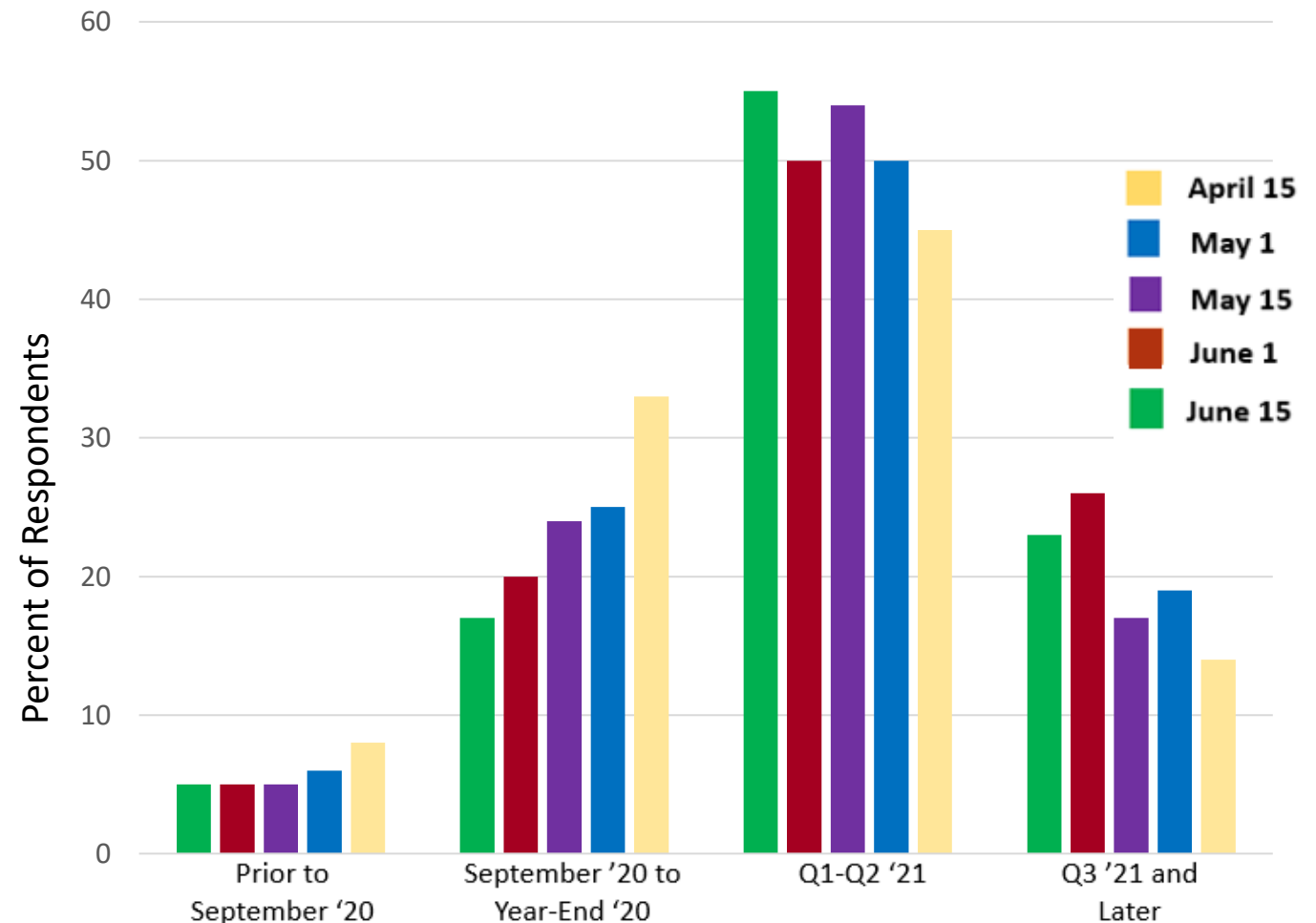


## Four out of every five planners are looking to 2021 and beyond for their new events

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

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ Prior to September 2020	4.78%
▼ September to Year-End 2020	16.42%
▼ Q1 2021	38.21%
▼ Q2 2021	17.61%
▼ Q3 2021	9.55%
▼ Q4 2021	3.28%
▼ Q1 2022 and later	10.15%
TOTAL	

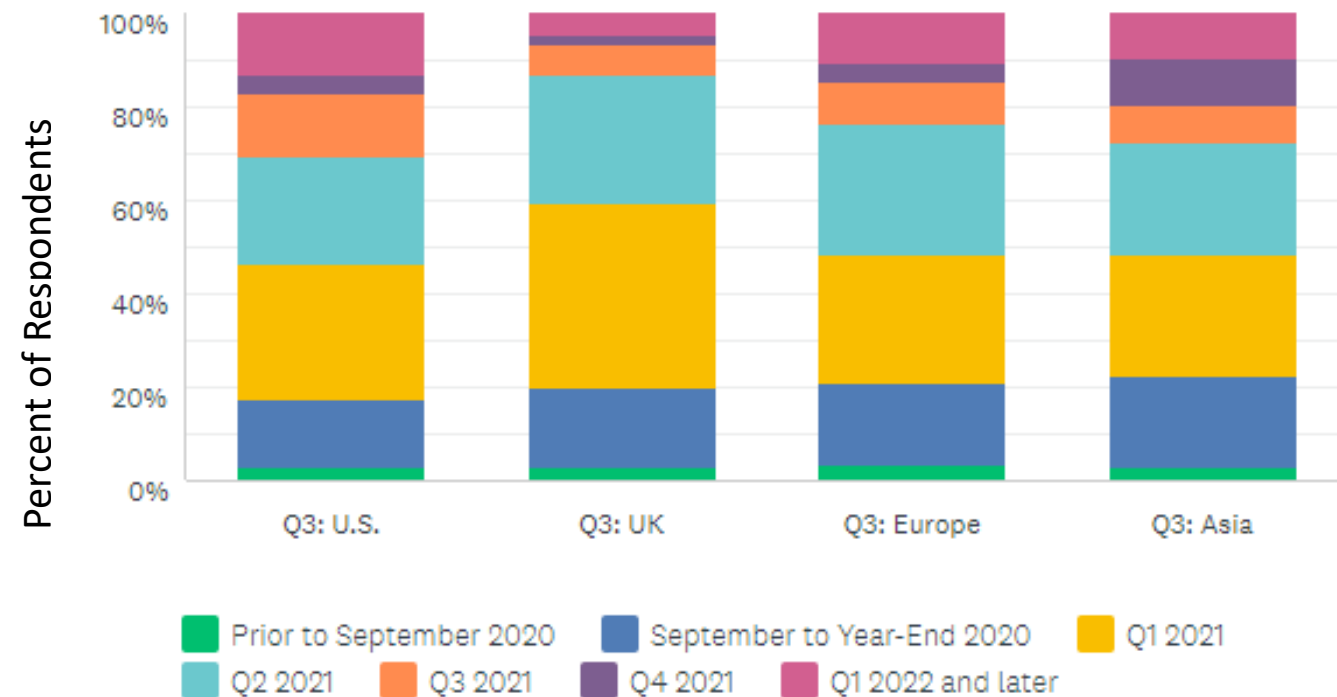


## As events actualize in Asia, planners see hope for this year with the UK relatively bullish on Q1 '21 and next year overall

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

July 15 Responses

	PRIOR TO SEPTEMBER 2020	SEPTEMBER TO YEAR-END 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022 AND LATER
Q3: U.S.	2.84% 12	14.69% 62	28.91% 122	23.22% 98	13.27% 56	4.27% 18	12.80% 54
Q3: UK	2.88% 4	17.27% 24	39.57% 55	27.34% 38	6.47% 9	2.16% 3	4.32% 6
Q3: Europe	3.42% 5	17.81% 26	27.40% 40	28.08% 41	8.90% 13	4.11% 6	10.27% 15
Q3: Asia	3.23% 2	19.35% 12	25.81% 16	24.19% 15	8.06% 5	9.68% 6	9.68% 6

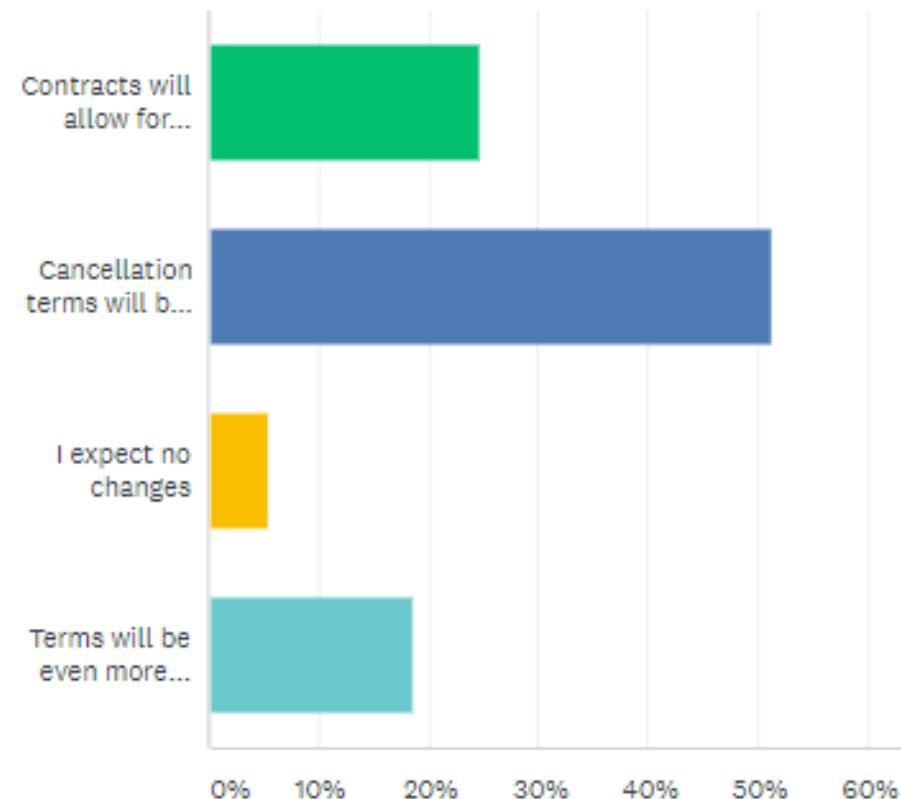


## Planners are increasingly sanguine about contracts and cancellation terms

### What are your expectations regarding cancellation clauses?

June 15 Responses

ANSWER CHOICES	RESPONSES	
▼ Contracts will allow for cancellation without penalty	24.63%	83
▼ Cancellation terms will be more forgiving	51.34%	173
▼ I expect no changes	5.34%	18
▼ Terms will be even more stringent	18.69%	63
TOTAL		337



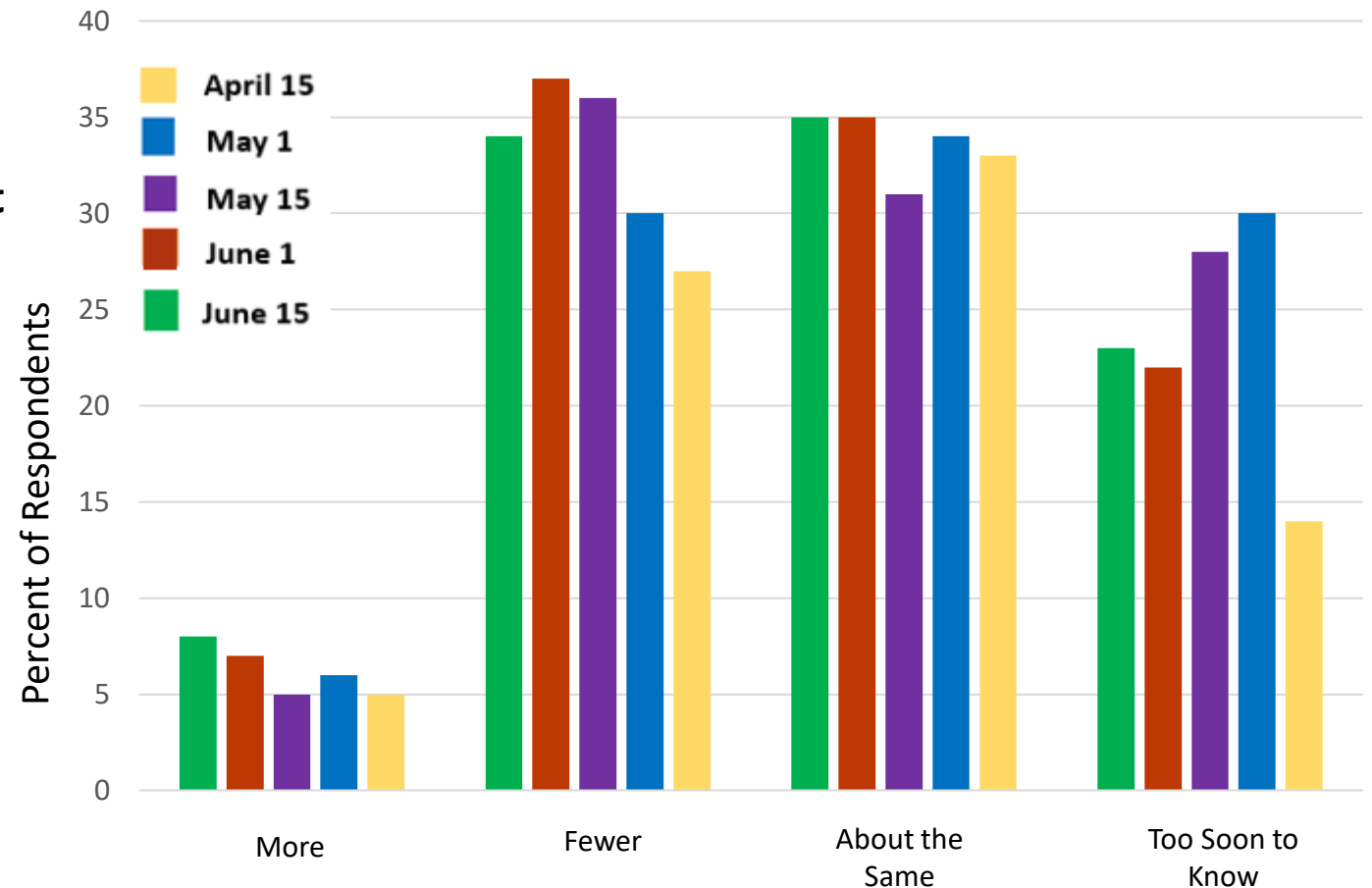


## 1 in 3 planners believe they'll plan fewer events post-COVID-19, though that number continues to decline

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

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ More	7.99%
▼ Fewer	33.73%
▼ About the same	35.21%
▼ It's too soon to know.	23.08%
TOTAL	



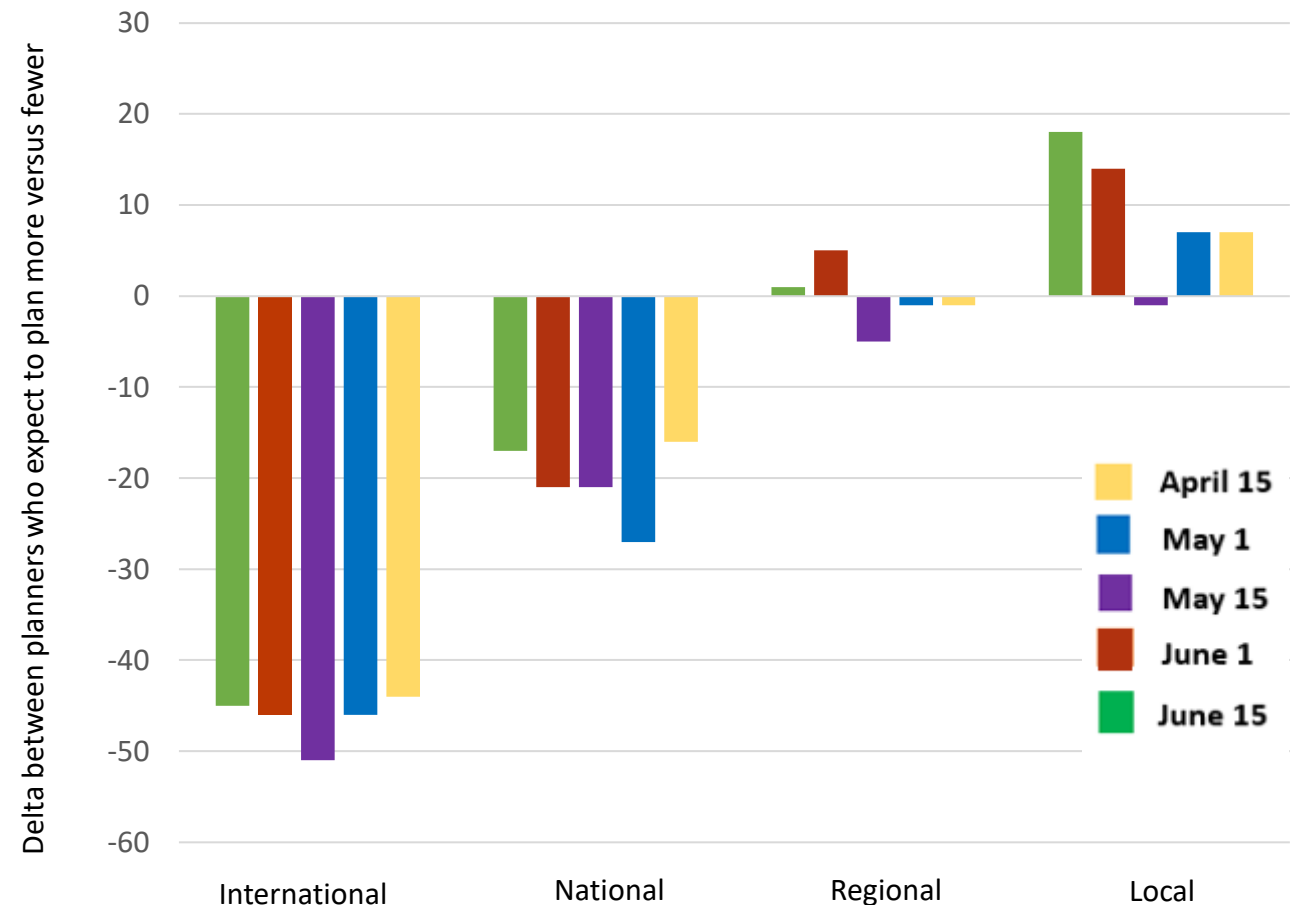
# Will you plan more or fewer?

Planners are bullish for local events, as prospects improve from previous lows overall

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

June 15 Responses

	MORE	FEWER
International	5.56% 11	51.01% 101
National	11.91% 33	29.24% 81
Regional	24.51% 62	24.51% 62
Local	35.71% 80	17.41% 39

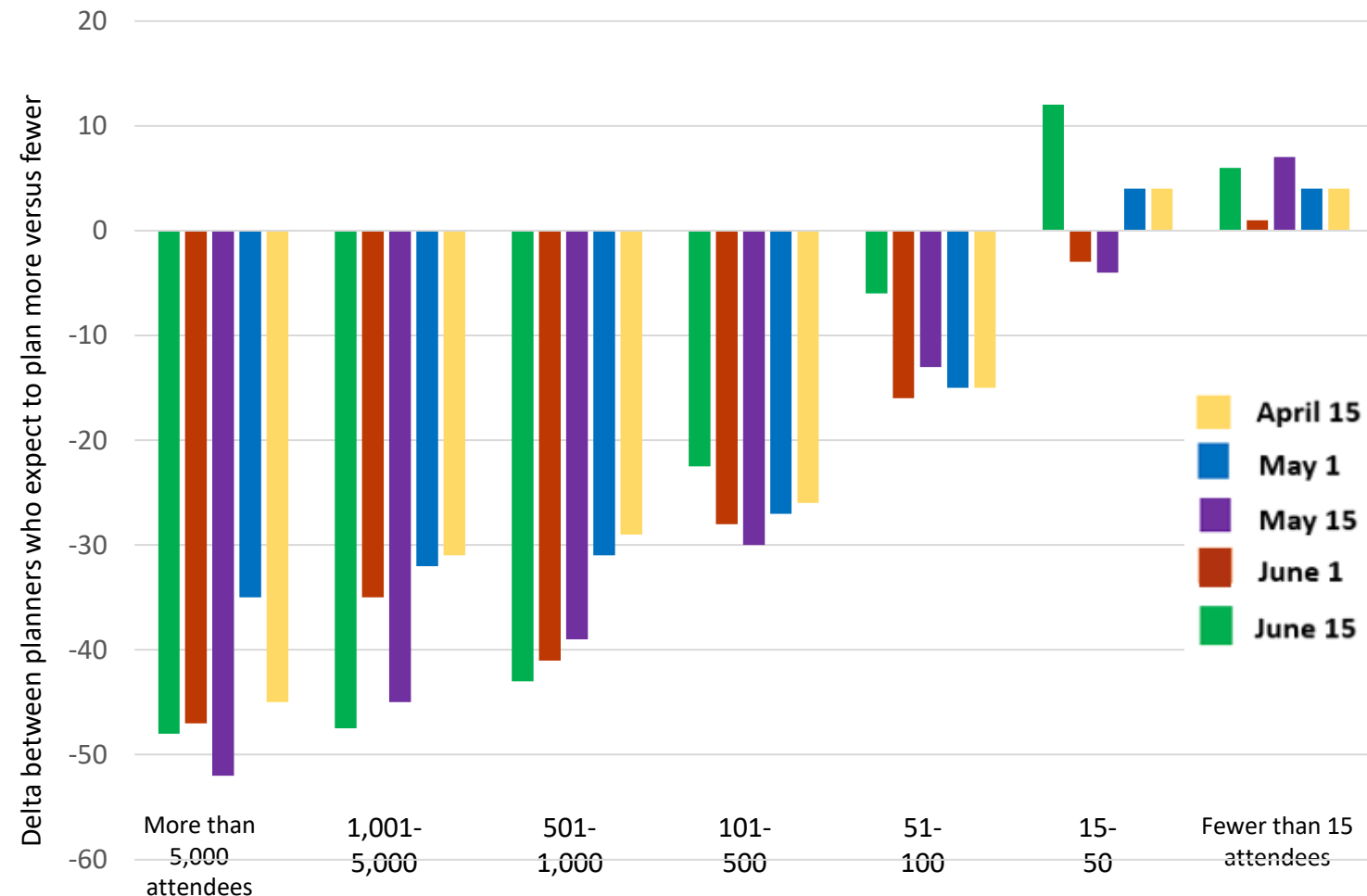


## “Sweet spot” for post-COVID-19 meetings? 100 attendees or less

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

June 15 responses

	MORE	FEWER
More than 5,000 attendees	3.70% 3	51.85% 42
1,001-5,000 attendees	3.33% 4	50.83% 61
501-1,000 attendees	4.88% 8	48.17% 79
101-500 attendees	9.64% 27	32.14% 90
51-100 attendees	19.54% 51	25.29% 66
15-50 attendees	29.34% 76	17.76% 46
Fewer than 15 attendees	26.51% 44	20.48% 34

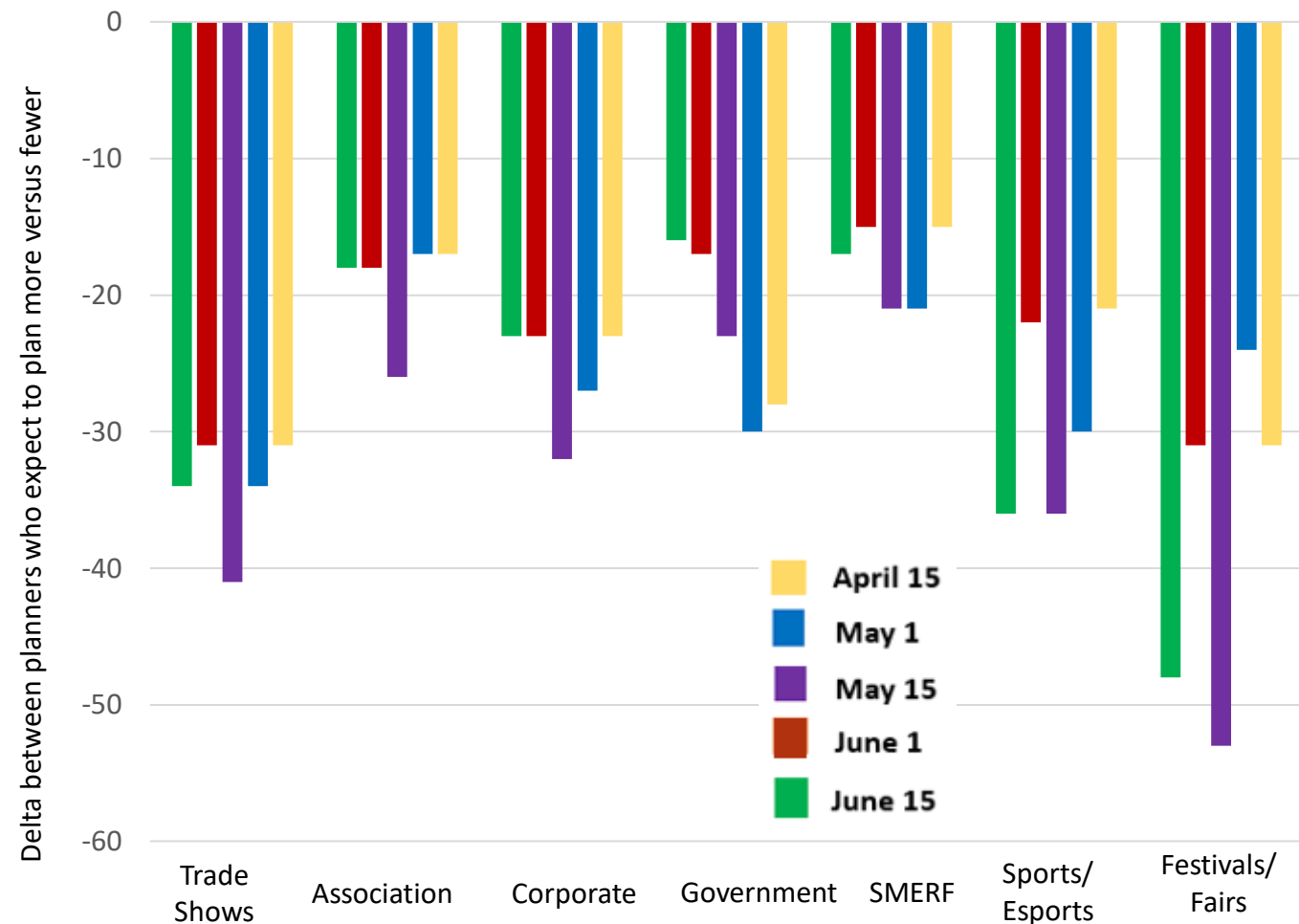


# Associations, Government, Corporate: If they can meet, they more likely will

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

June 15 Responses

	MORE	FEWER
Trade Shows/Exhibitions/Congresses	5.63% 9	40.00% 64
Association	4.71% 8	22.94% 39
Corporate	9.95% 20	33.33% 67
Government	14.71% 10	30.88% 21
Social, Military, Education, Religion, Fraternal	15.58% 12	32.47% 25
Sports/Esports	13.21% 7	49.06% 26
Festivals/Fairs	1.92% 1	50.00% 26



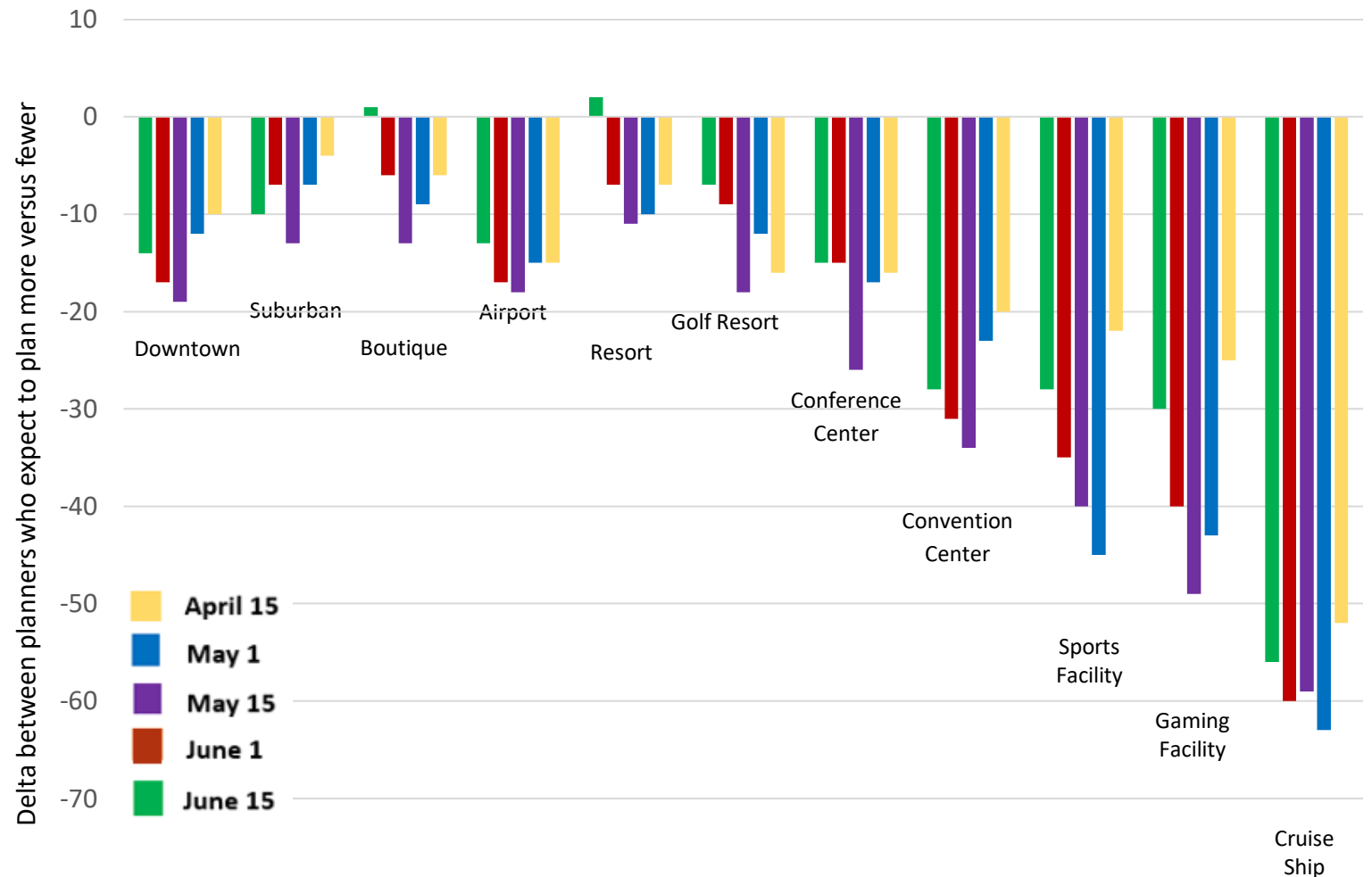


## Are we seeing the impact of clean building standards?

### All venues improve, with planners positively disposed to boutiques, resorts

#### June 15 Responses

	MORE	FEWER
▼ Downtown Hotel	9.22% 27	22.87% 67
▼ Suburban Hotel	14.29% 35	24.49% 60
▼ Boutique Hotel	20.64% 45	19.72% 43
▼ Airport Hotel	13.17% 22	26.35% 44
▼ Resort	18.80% 44	17.09% 40
▼ Golf Resort	15.43% 27	22.29% 39
▼ Conference Center	11.26% 26	25.97% 60
▼ Convention Center	6.70% 13	34.54% 67
▼ Sports Facility/Stadium/Arena	14.43% 14	42.27% 41
▼ Gaming Facility	13.25% 11	43.37% 36
▼ Cruise Ship	10.29% 7	66.18% 45
▼ Other	23.08% 15	20.00% 13

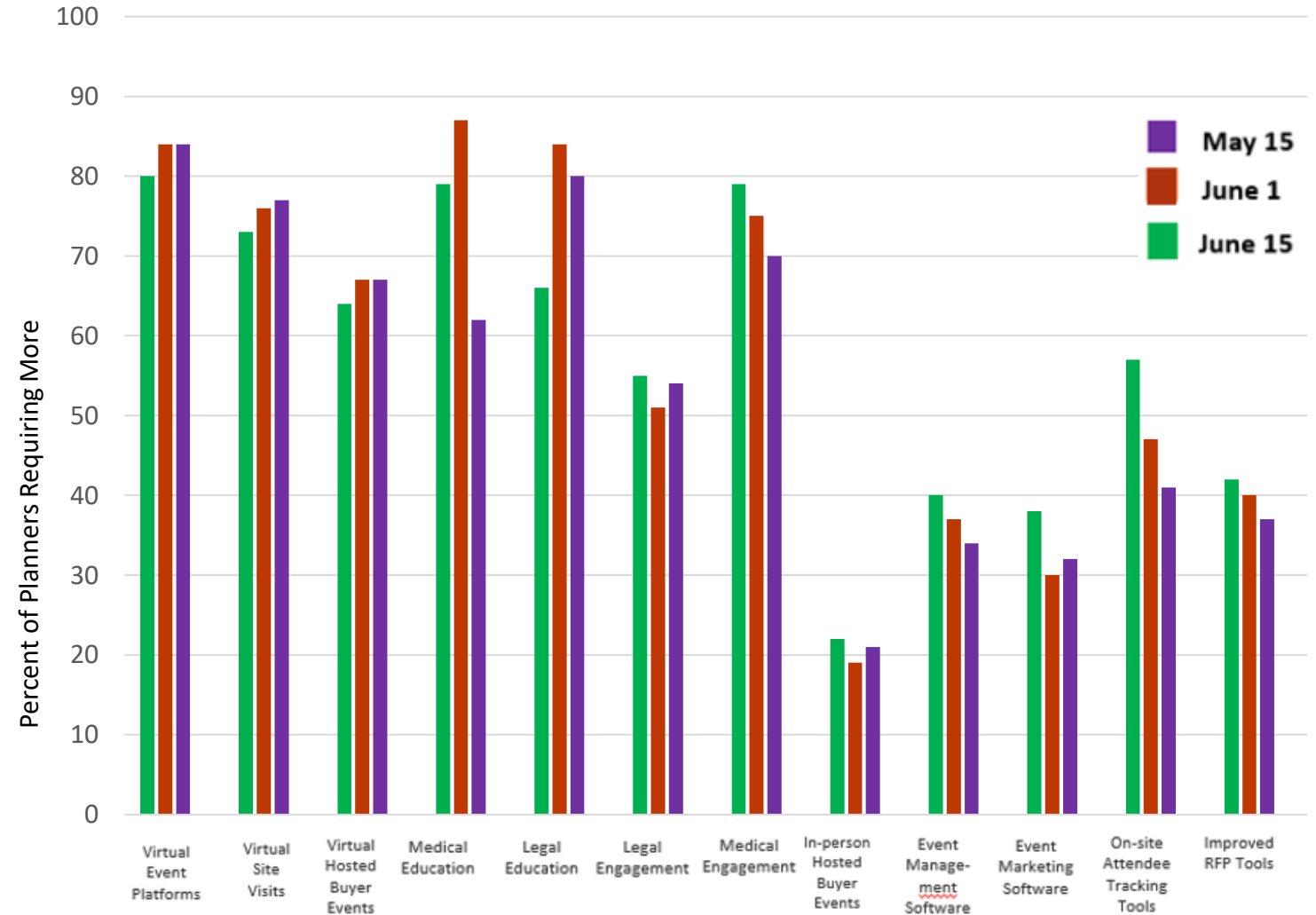


## “Virtual” and “medical” top priorities, while attendee tracking gains favor

Do you expect you will require more or fewer of these products/services to plan your meetings and events?

June 15 Responses

	MORE		MORE
Virtual event platforms	80.39% 250	On-site registration tools to minimize crowding and touch points	78.00% 234
Virtual site visits	73.45% 213	Event management software	39.85% 108
Education specific to legal matters	65.57% 179	Event marketing software	38.30% 90
Education specific to health/medical safety matters	79.36% 223	On-site attendee-tracking tools	57.31% 145
Engagement of professional legal advisory services	54.72% 139	Improved RFP tools	41.80% 102
Engagement of health/medical safety advisory services	73.48% 194		
In-person, hosted-buyer events and fairs to support buying decisions	22.42% 50		
Virtual hosted-buyer events and fairs to support buying decisions	64.00% 128		

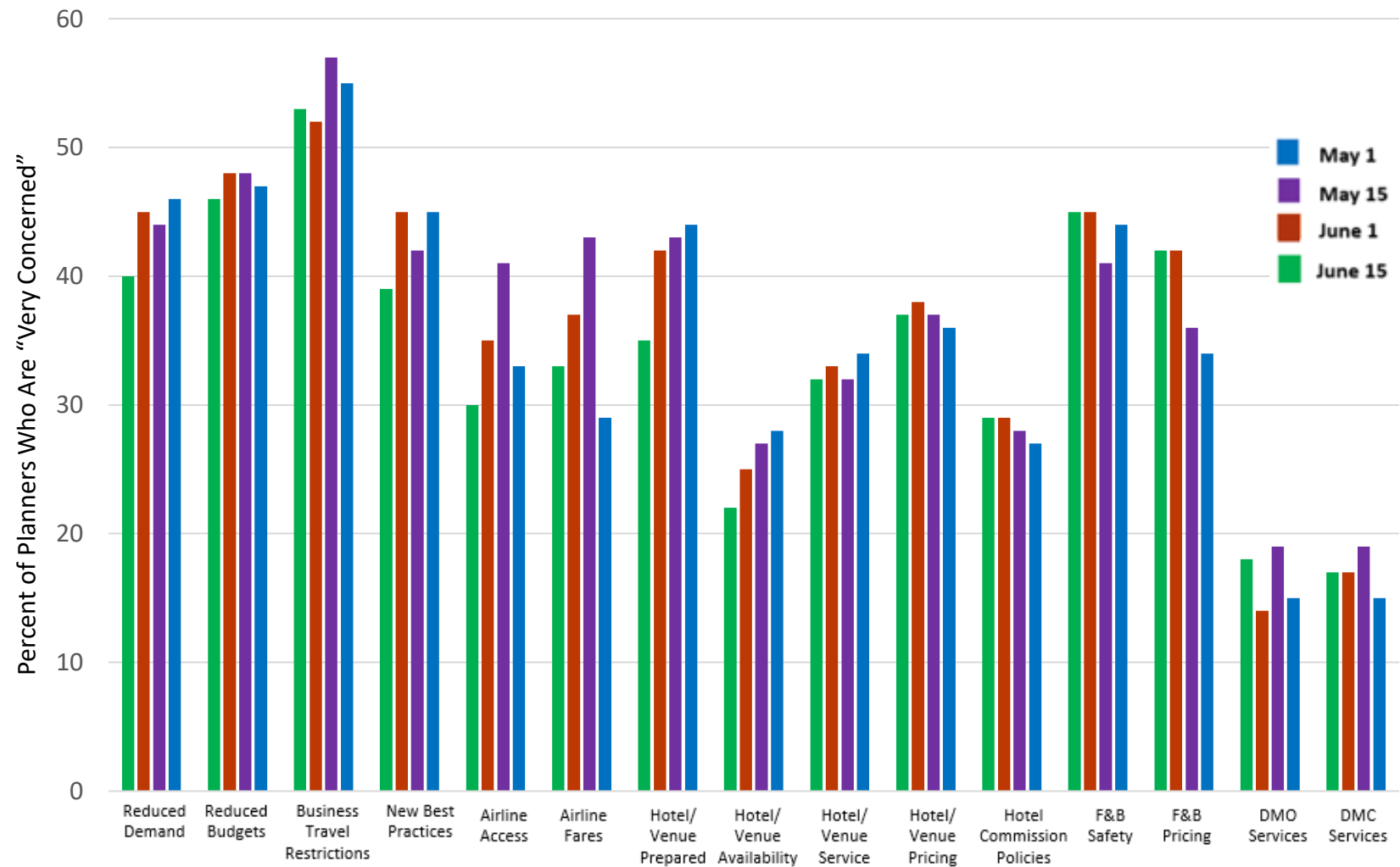


## Business travel restrictions, F&B are planners top concerns

How concerned are you about the following?

June 15 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	39.64% 132	Hotel and venue service levels	31.91% 105
Reduced meeting and event budgets	46.08% 153	Hotel and venue pricing and rates	37.35% 124
Travel policy updates restricting business travel	52.73% 174	Hotel commission policies	28.67% 80
New best practices for gatherings	39.33% 129	Food-and-beverage safety	44.98% 148
Airline accessibility	30.10% 93	Food-and-beverage pricing	41.69% 138
Airline fares	32.91% 103	DMO availability and service levels	17.77% 43
Hotel and venue health and safety preparedness	35.24% 117	DMC availability and service levels	16.80% 43
Hotel and venue availability	22.36% 74		



## Whatever it takes? Planners know these are the “new normal”

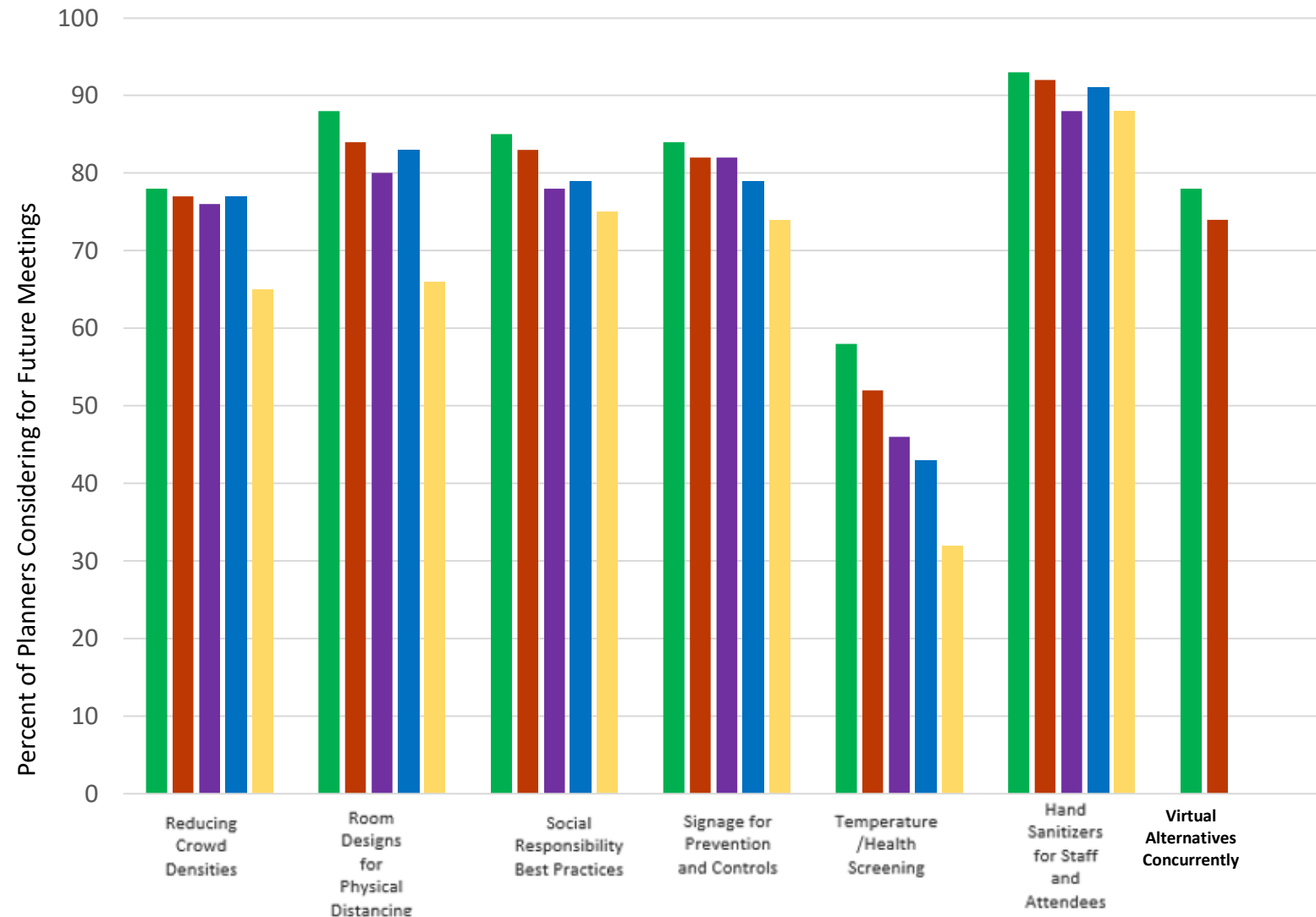
Are you considering any of the following in the planning of future events?

### June 15 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	77.71%
Developing meeting room designs to encourage physical distancing	87.68%
Putting into place social responsibility best practices, including protocols for attendees who are ill	84.75%
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	84.46%
Providing temperature/health screening	58.36%
Providing hand sanitizer on-site for staff and attendees	92.67%
Providing virtual alternatives concurrently with physical events	77.71%
None of the above	1.17%
Other (please specify)	3.23%

Total Respondents: 575

April 15  
May 1  
May 15  
June 1  
June 15



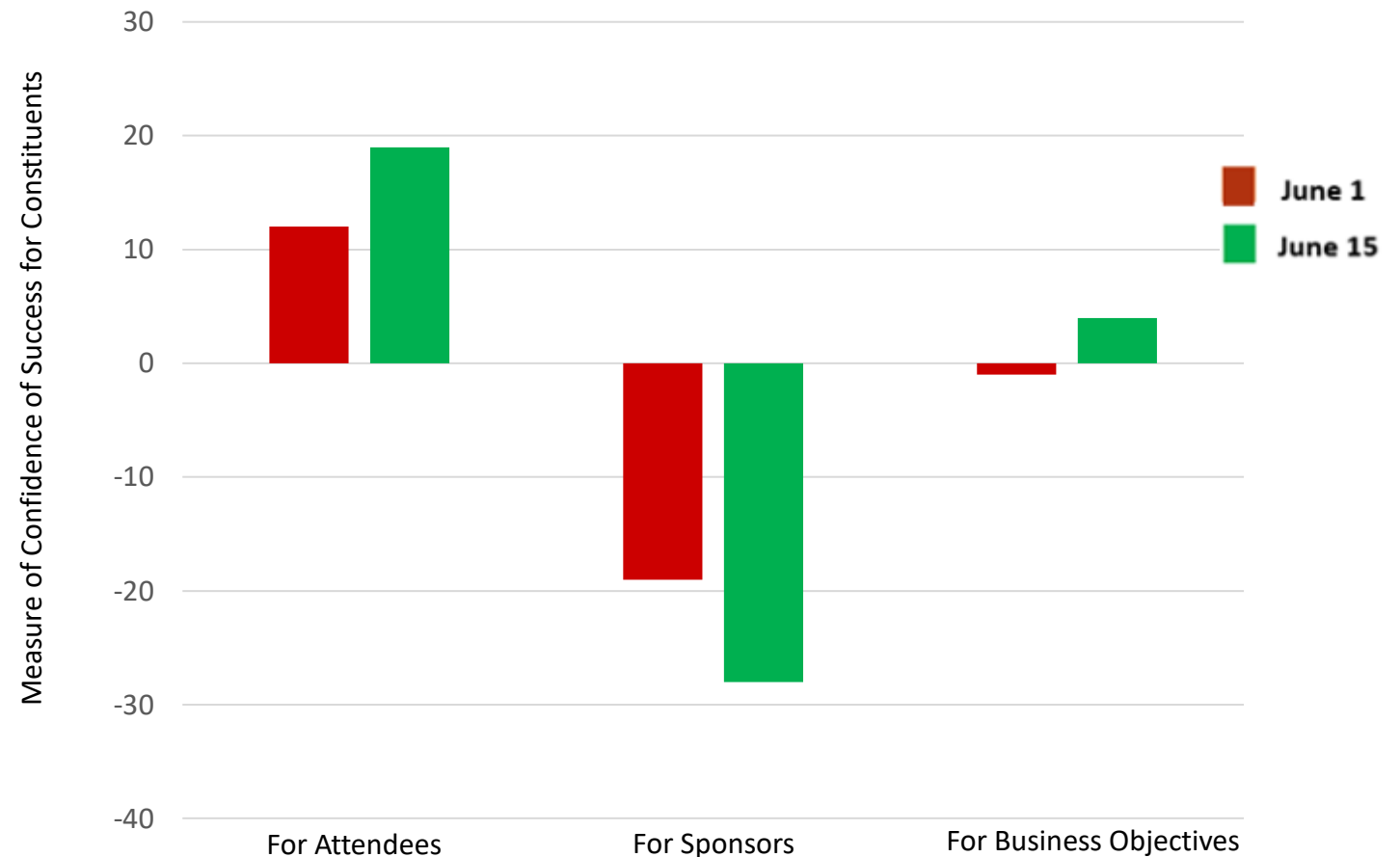


## Application of virtual to attendees is more readily understood, though a sponsor model is elusive

How successful will virtual events be for your constituents? Please rate your confidence, 5 being highly confident, one being not at all confident

June 1 Responses

	1-2	3	4-5
▼ For attendees	22.02% 74	37.20% 125	40.77% 137
▼ For sponsors	47.24% 154	33.13% 108	19.63% 64
▼ For business objectives	31.53% 105	33.33% 111	35.14% 117
▼ Not applicable	54.69% 35	26.56% 17	18.75% 12



## In Summary:

- ✓ Back to work: 1 in 5 planners are back in their offices
  - ✓ Hesitancy to book meetings/events is exacerbated by difficulty reaching suppliers
  - ✓ 4 in 10 planners expect to actualize events before year-end 2020
  - ✓ Local meetings of 100 attendees or less are the post-COVID-19 industry standard, for now
  - ✓ Planners anticipate continued contract resiliency, flexibility
  - ✓ Boutiques and resorts are the preferred venues for post COVID-19 meetings
  - ✓ How do you achieve your business objectives through virtual meetings? Planners are not sure
- “I’m concerned about the domestic regional differences of restrictions in opening and conducting events. I will consider looking at more secondary and other markets instead of big cities, as long as transportation to/from is adequate.”
  - “With large meetings industry conferences like IMEX and CONNECT canceling, it's hard to convince clients that meetings will be safe, and that they should move forward on their face-to-face events.”
  - “Concerns revolve around the behavioral mind shift of the planner and attendee as it relates to the mitigation of risks for in-person events and the ROI on virtual events. The uncertainty is unsettling. It will take several years to build the level of trust in having safe and effective in-person events.”
  - “My concern is that my clients and prospective clients are afraid to move forward with in-person meetings due to the fear of liability.”
  - “In truth, between budget cuts and Covid-19 fears, most of our delegates will not travel until there is a vaccine .”