



PULSE SURVEY

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

TUESDAY, JUNE 2, 2020



NORTHSTAR
MEETINGS GROUP

Nowhere to Go But Up?

Tuesday, June 9, 2020

Northstar Meetings Group Panel:



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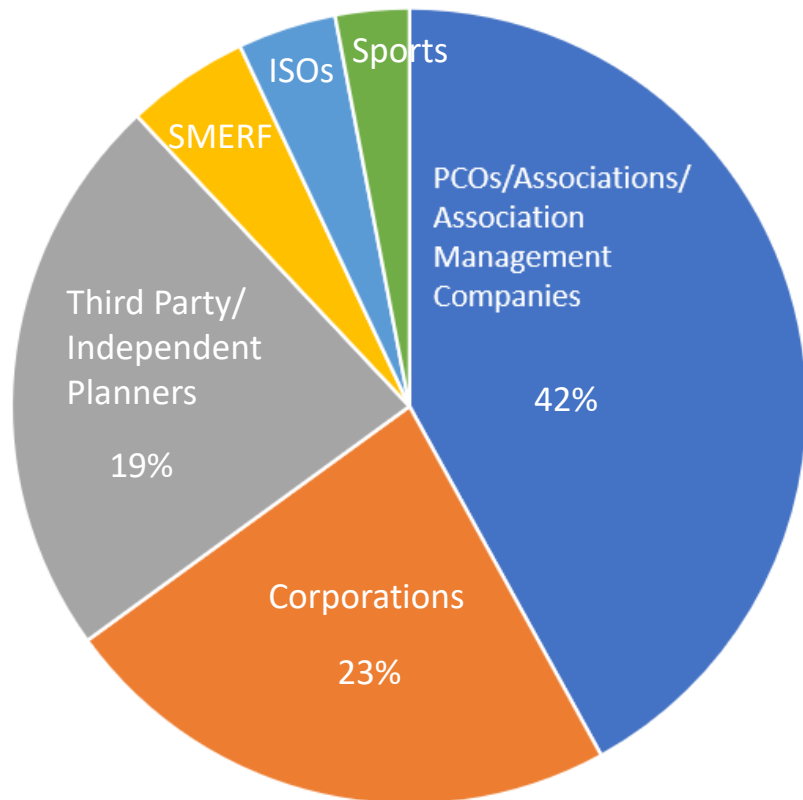
Phocuswright

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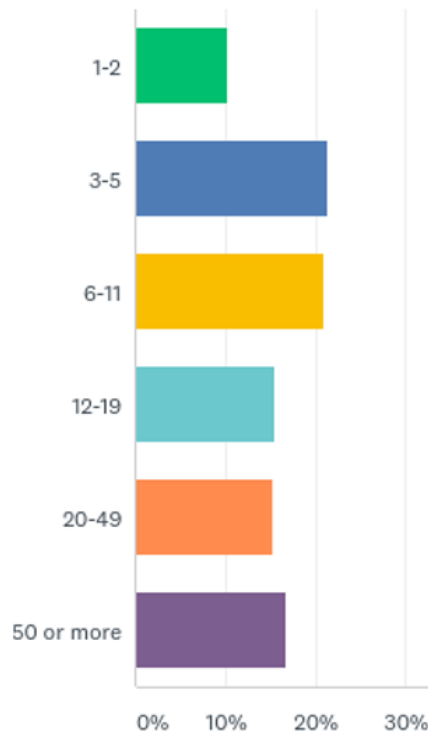
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Respondents By Type, Volume and Size

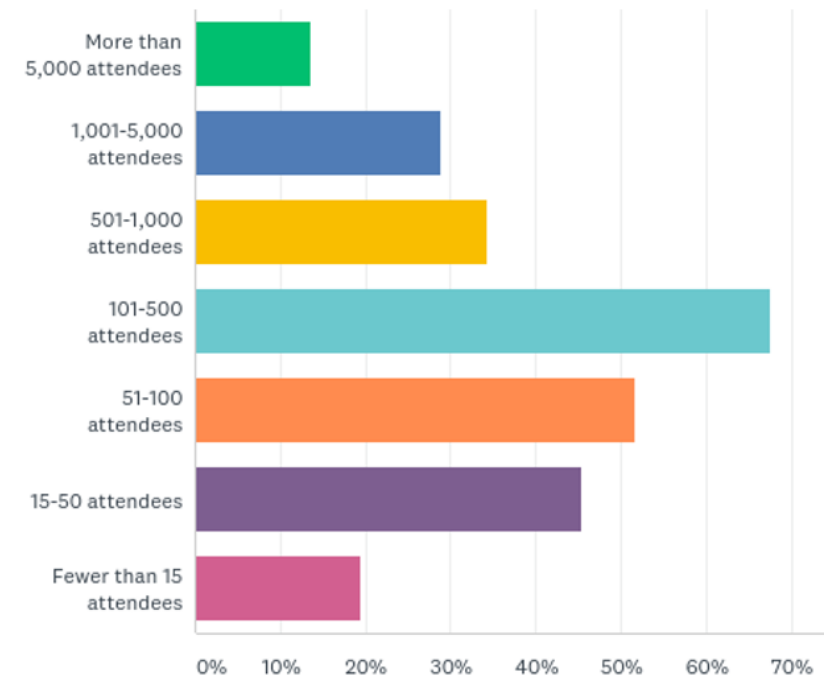
795 Valid Planner Responses



Type

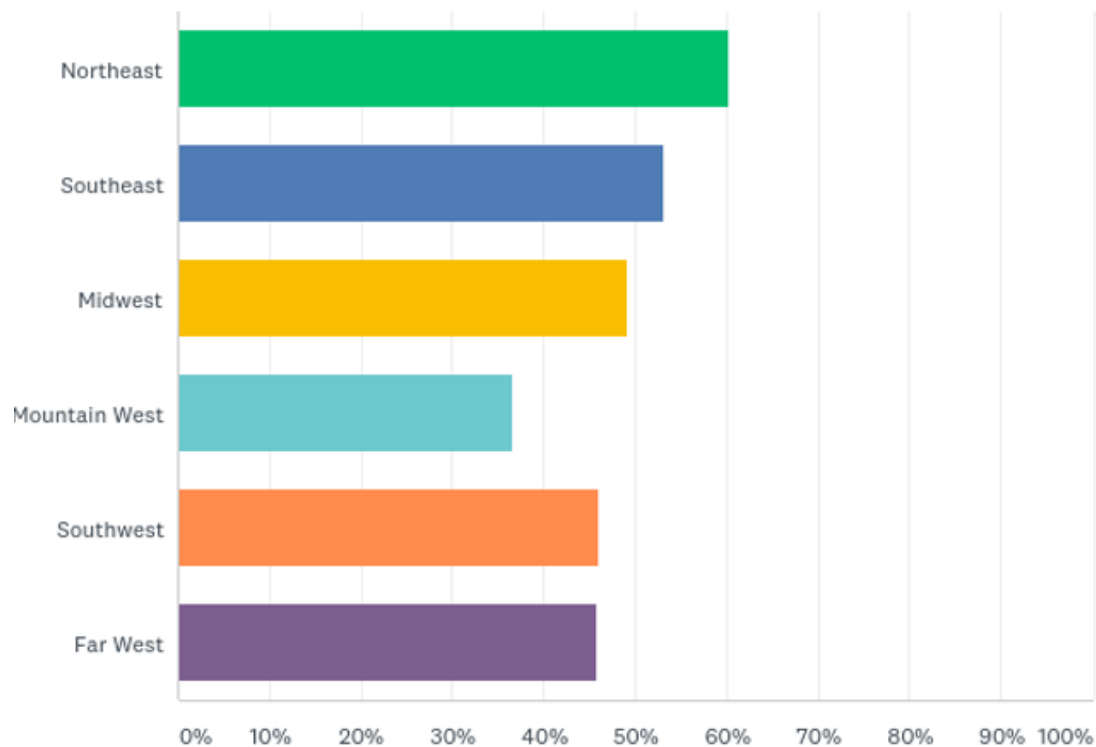
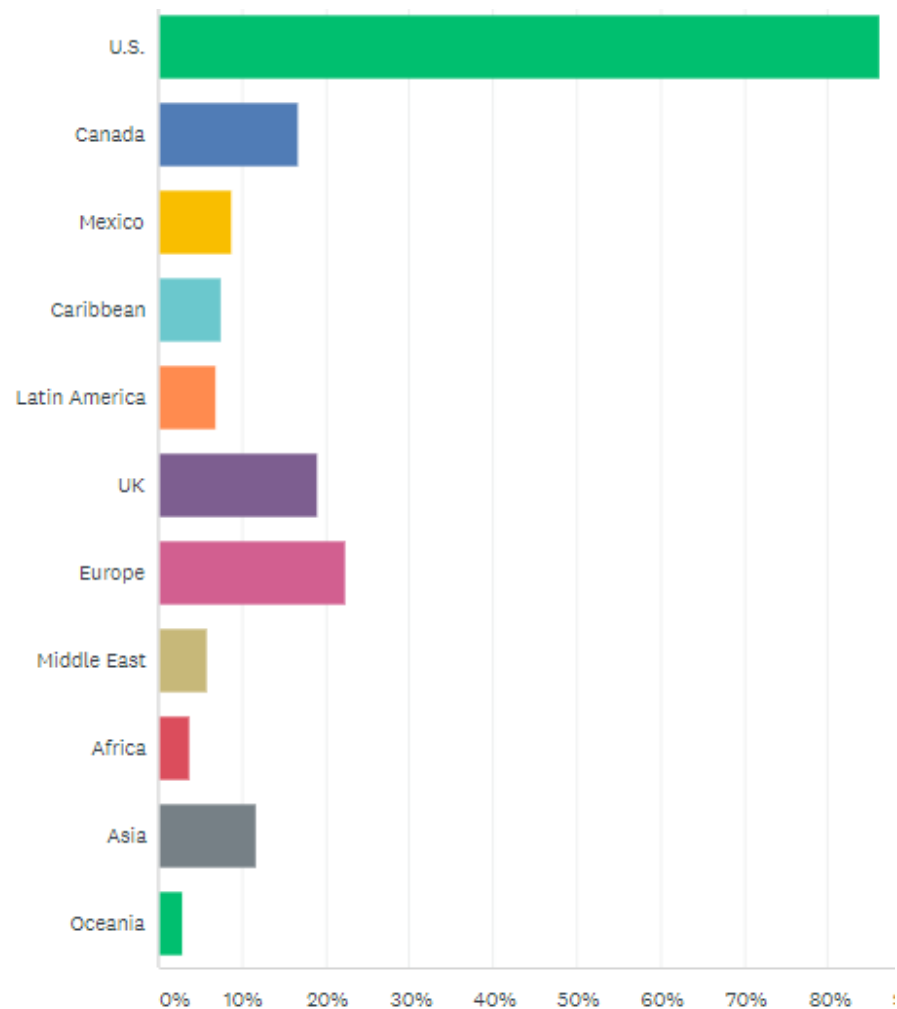


of Meetings



Size of Meeting

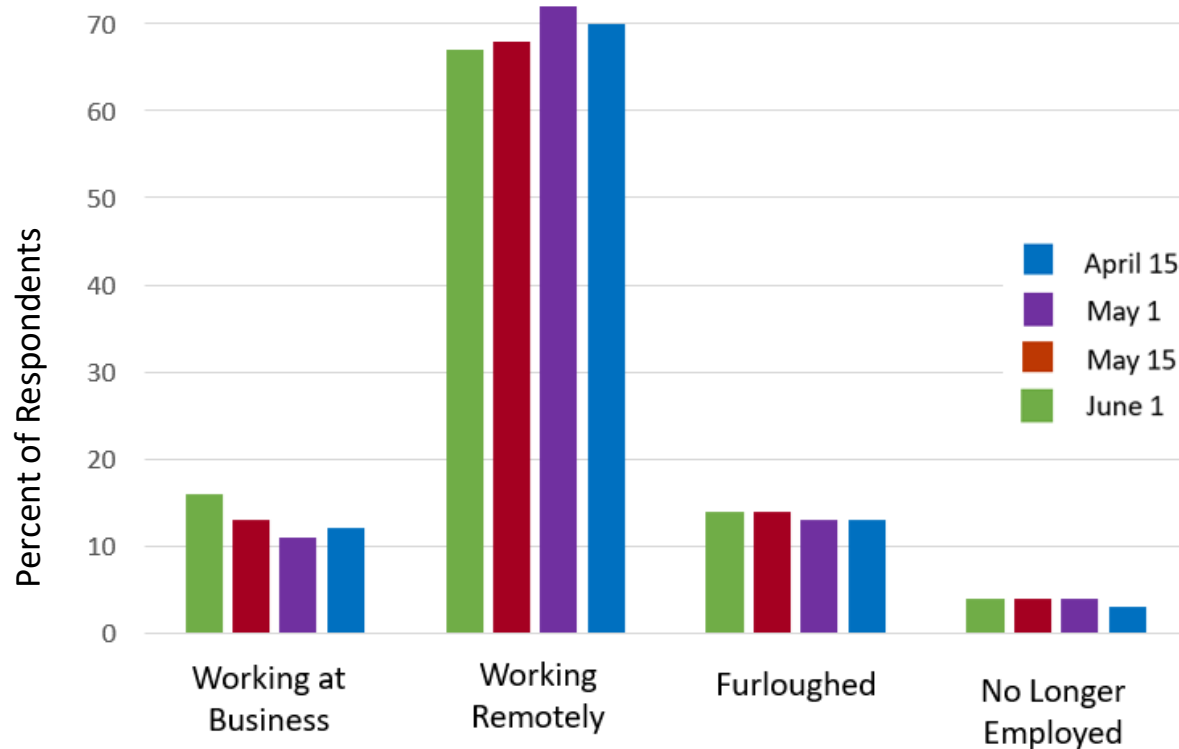
Respondents by Meeting Location



As countries and cities reopen, planners are cautiously returning to their business locations

June 1 Responses

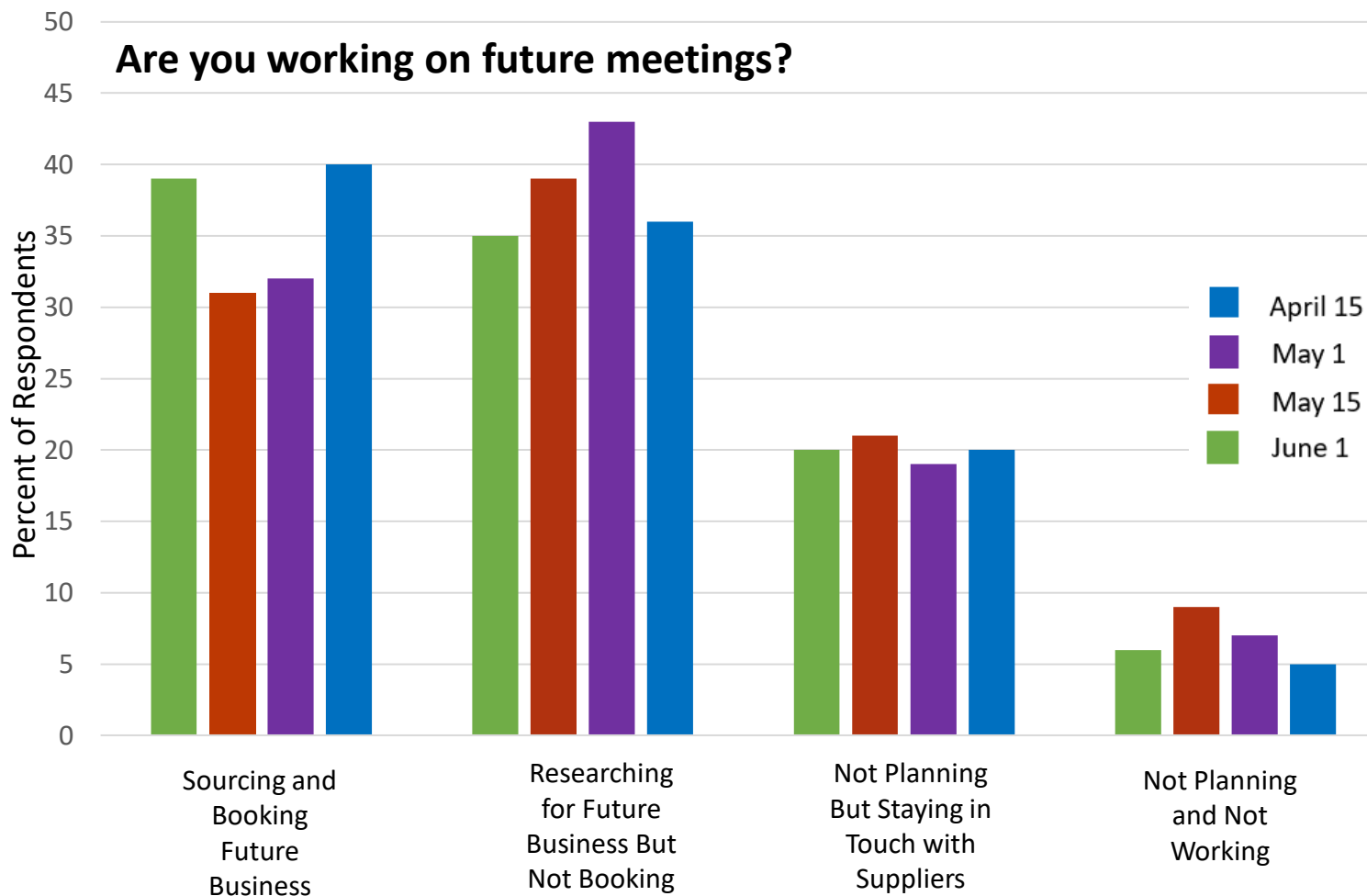
ANSWER CHOICES	RESPONSES
Working full time at a business location	16.29% 121
Working full time remotely	67.16% 499
Furloughed, I remain employed but I am now working part-time.	5.92% 44
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	3.23% 24
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	3.77% 28
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	2.29% 17
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.	1.35% 10
TOTAL	743



After nearly two months of declines, have we found the bottom? More planners are booking, not just looking

June 1 Responses

ANSWER CHOICES	RESPONSES	
Yes, sourcing and booking future business	38.68%	222
Researching for future meetings but not booking	35.19%	202
Not planning, but staying in touch with destination and venue partners	20.73%	119
Not planning and not staying in contact at this point	2.96%	17
Not employed	2.44%	14
TOTAL		574

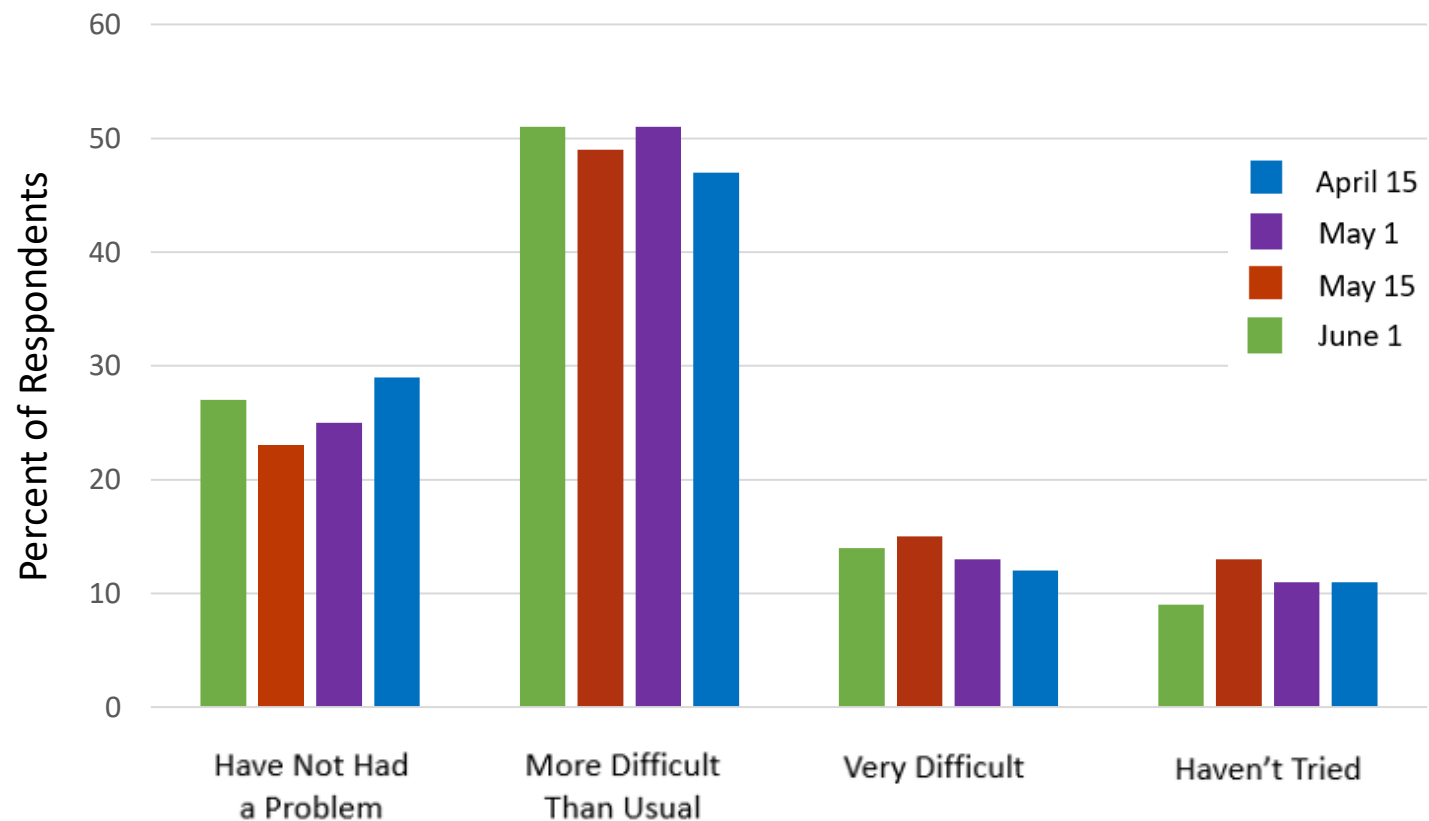


2 out of 3 planners are experiencing problems with suppliers, but there's a positive: More of them are reaching out

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

June 1 Responses

ANSWER CHOICES	RESPONSES	
I have not had a problem.	26.53%	152
It has been more difficult than usual.	50.61%	290
It has been very difficult.	13.79%	79
I haven't tried.	9.08%	52
TOTAL		573

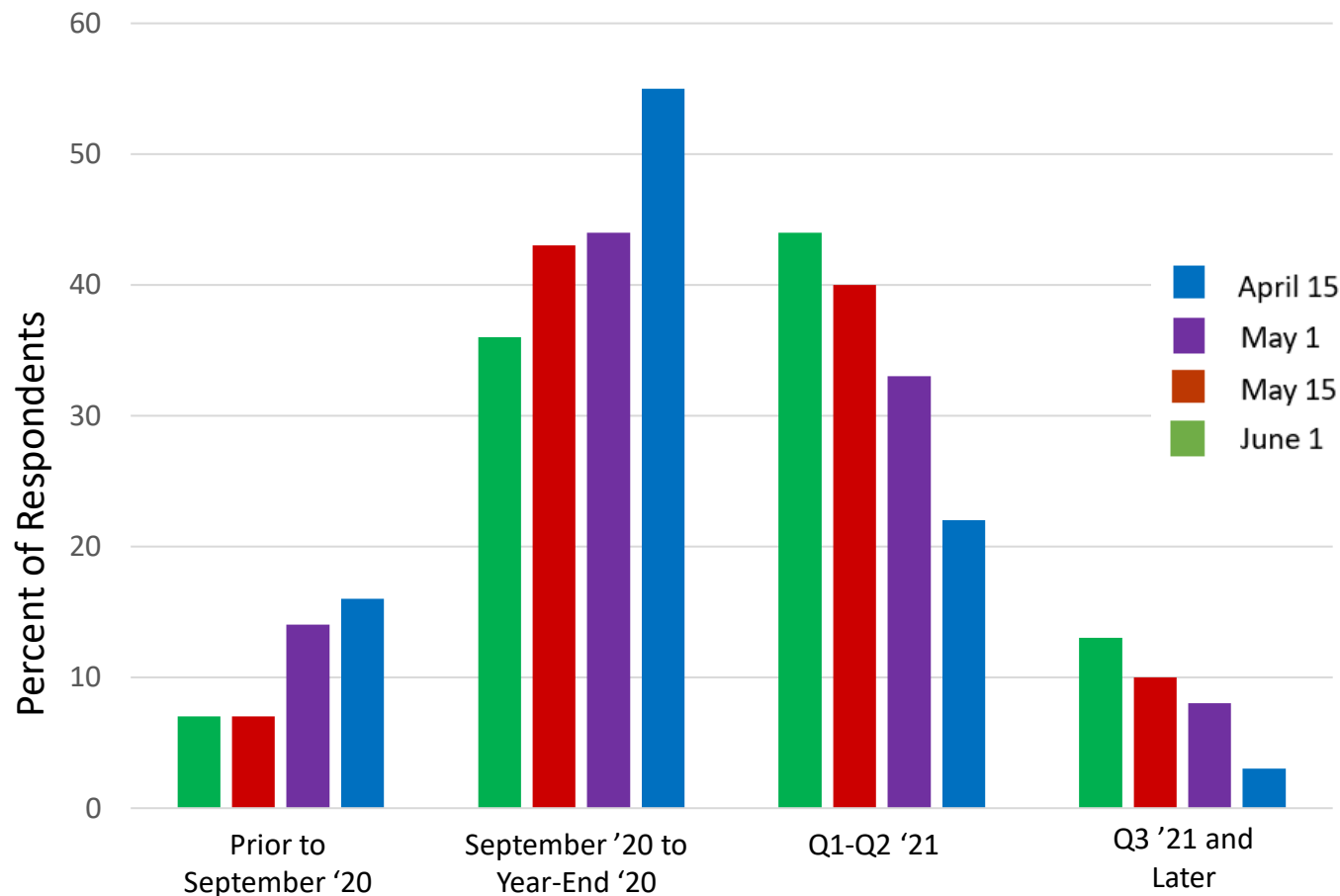


Confidence continues to decline for rescheduled events in '20, as the majority of planners reschedule events to '21 and later

When is the earliest you are RESCHEDULING meetings and events?

June 1 Responses

ANSWER CHOICES	RESPONSES	
▼ Prior to September 2020	6.85%	39
▼ September to Year-End 2020	36.56%	208
▼ Q1 2021	28.65%	163
▼ Q2 2021	15.47%	88
▼ Q3 2021	4.75%	27
▼ Q4 2021	4.22%	24
▼ Q1 2022 and later	3.51%	20
TOTAL		569

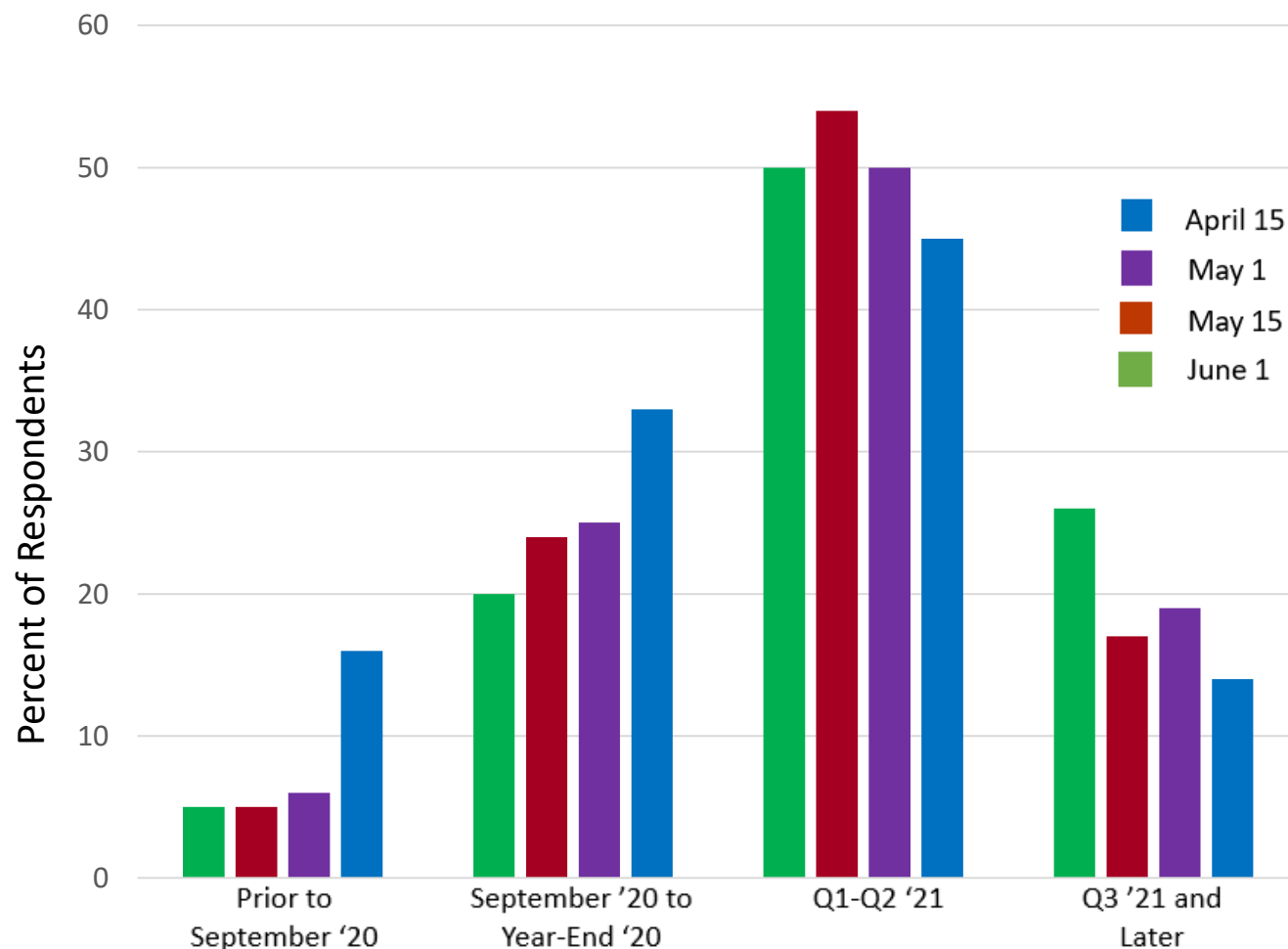


When scheduling new events, planners are showing increased preference for the back half of '21 and beyond

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

June 1 Responses

ANSWER CHOICES	RESPONSES	
▼ Prior to September 2020	4.55%	26
▼ September to Year-End 2020	20.45%	117
▼ Q1 2021	32.69%	187
▼ Q2 2021	16.96%	97
▼ Q3 2021	9.62%	55
▼ Q4 2021	4.55%	26
▼ Q1 2022 and later	11.19%	64
TOTAL		572

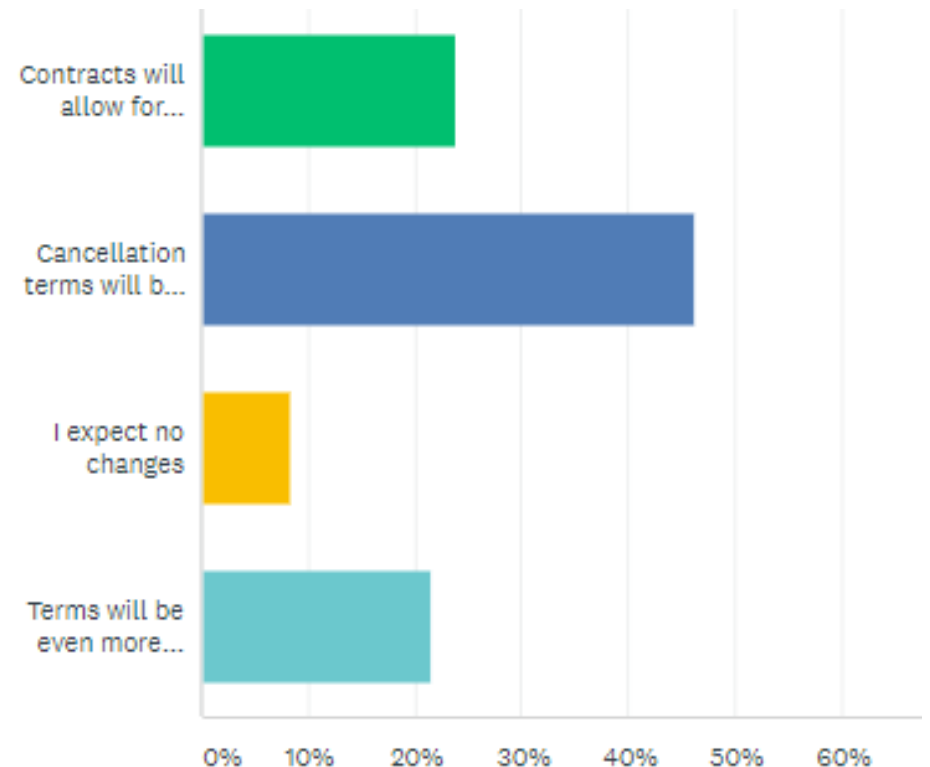


Planners are sanguine about contracts and cancellation terms

What are your expectations regarding cancellation clauses?

June 1 Responses

ANSWER CHOICES	RESPONSES
Contracts will allow for cancellation without penalty	23.83% 137
Cancellation terms will be more forgiving	46.26% 266
I expect no changes	8.35% 48
Terms will be even more stringent	21.57% 124
TOTAL	575

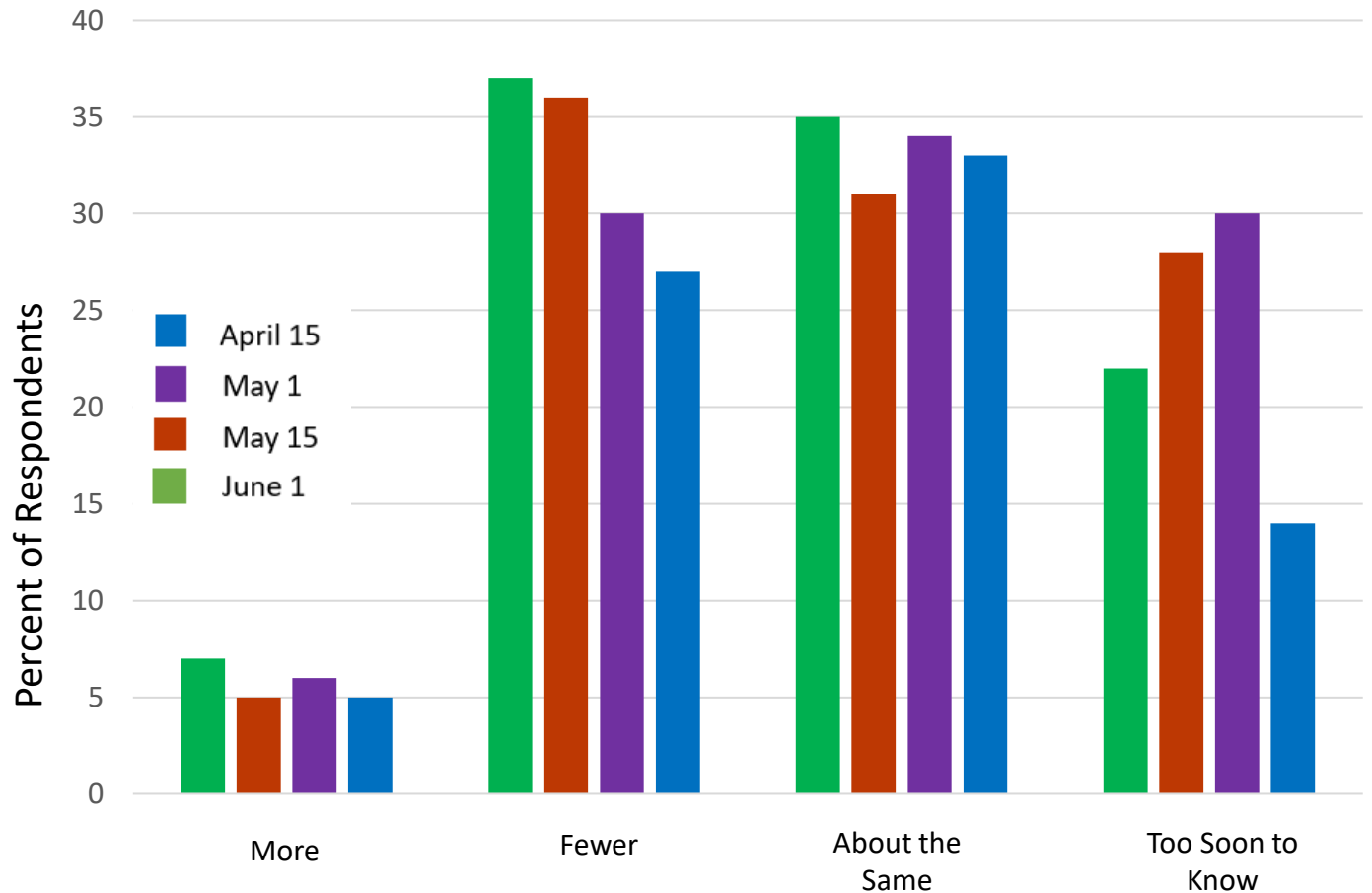


As planners begin to firm up their plans post-COVID-19, more planners are hopeful for their program volume

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

June 1 Responses

ANSWER CHOICES	RESPONSES	
More	6.59%	38
Fewer	36.57%	211
About the same	35.01%	202
It's too soon to know.	21.84%	126
TOTAL		577

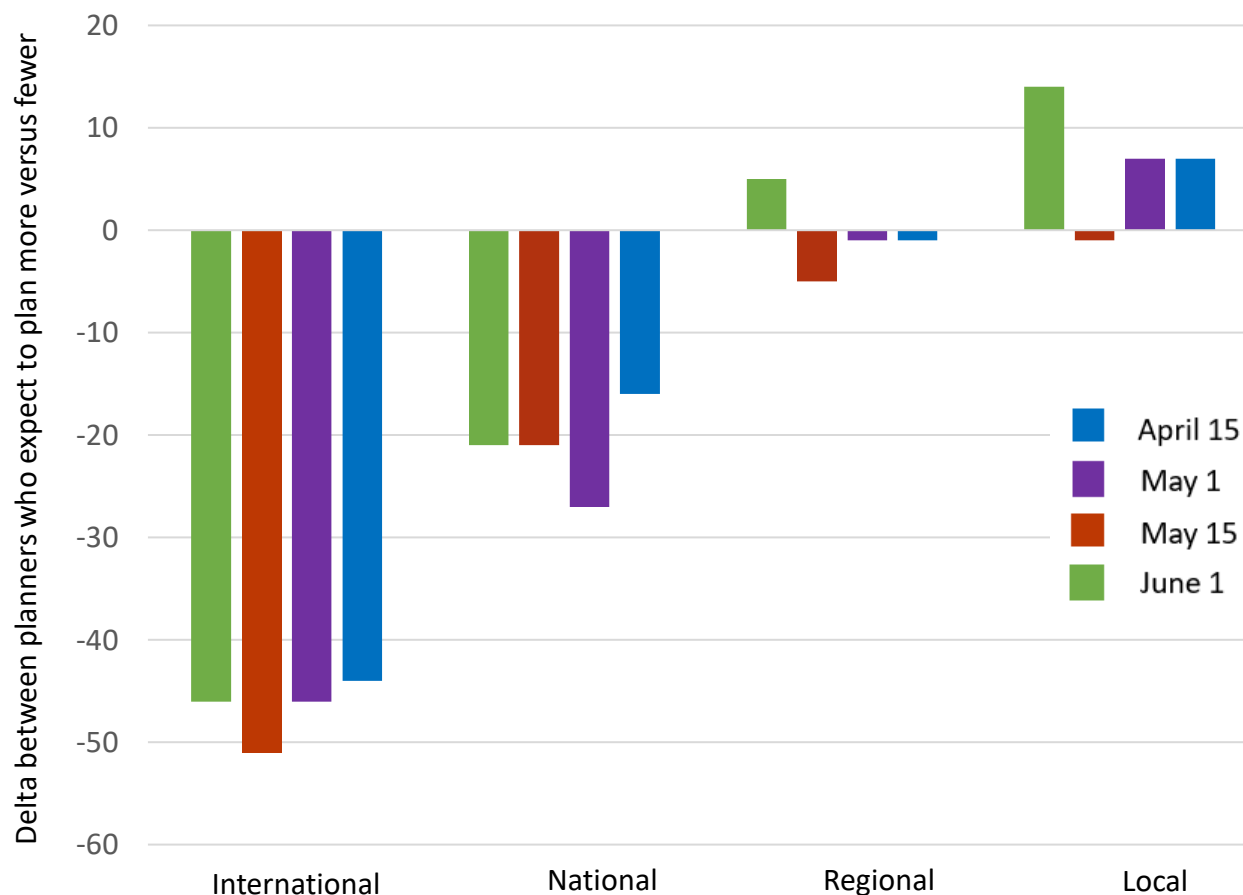


Regional and local events are “back in the black”; planners expect to plan more of them post-Covid-19

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

June 1 Responses

	MORE	FEWER
International	4.78% 14	51.88% 152
National	9.91% 46	31.03% 144
Regional	28.33% 117	23.00% 95
Local	32.09% 120	18.18% 68
Trade Shows/Exhibitions/Congresses	3.65% 11	39.20% 118
Association	5.73% 16	24.73% 69

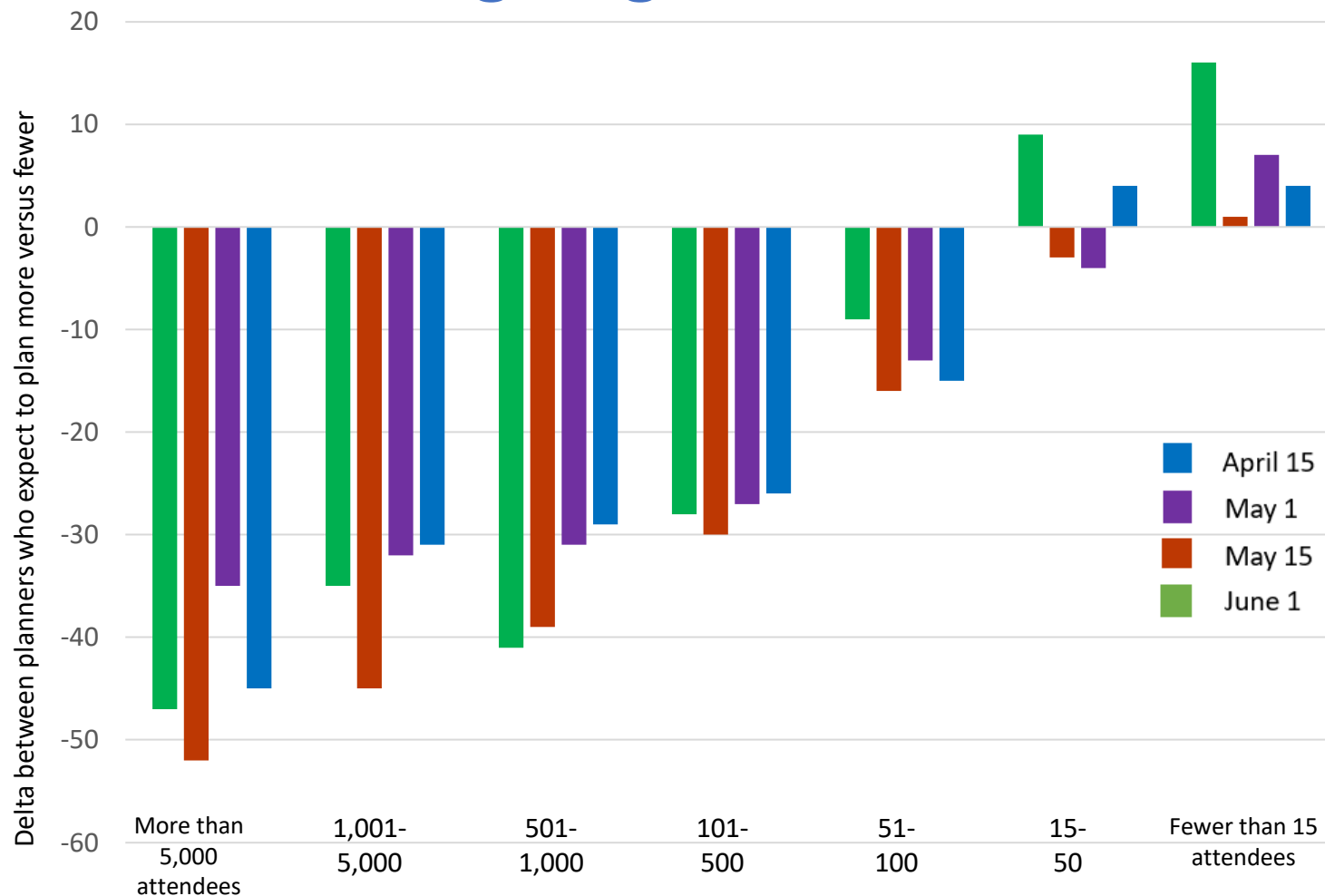


Confidence improves for events of (almost) all sizes; the smallest will see the largest growth

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

June 1 responses

	MORE	FEWER
More than 5,000 attendees	3.25% 4	51.22% 63
1,001-5,000 attendees	4.31% 9	39.71% 83
501-1,000 attendees	5.76% 16	47.12% 131
101-500 attendees	7.68% 35	36.18% 165
51-100 attendees	15.53% 68	24.89% 109
15-50 attendees	27.08% 114	18.05% 76
Fewer than 15 attendees	32.54% 96	16.27% 48

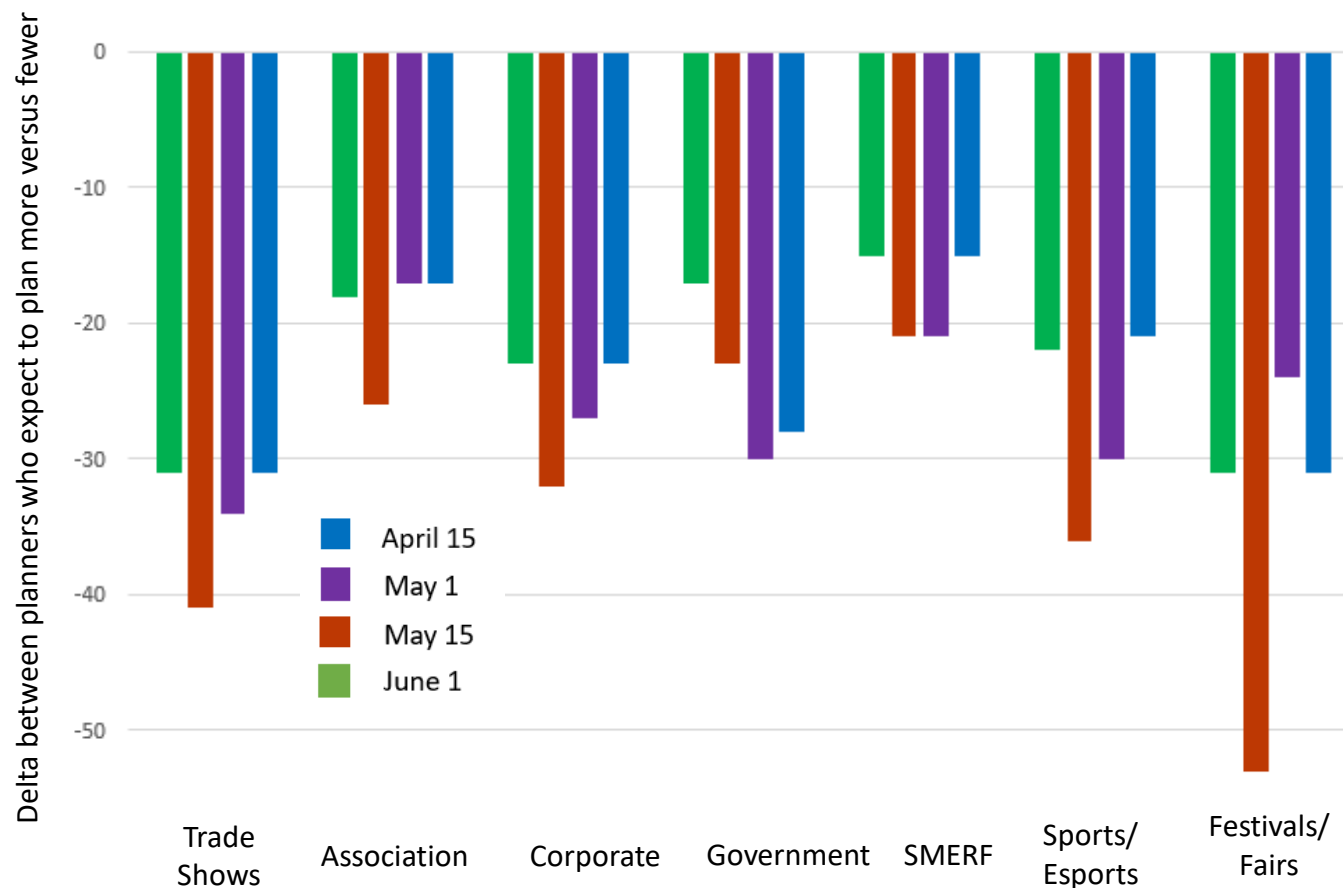


Though still low, has the tide begun to turn on expectations for 2021 and beyond for meetings of all types?

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

June 1 Responses

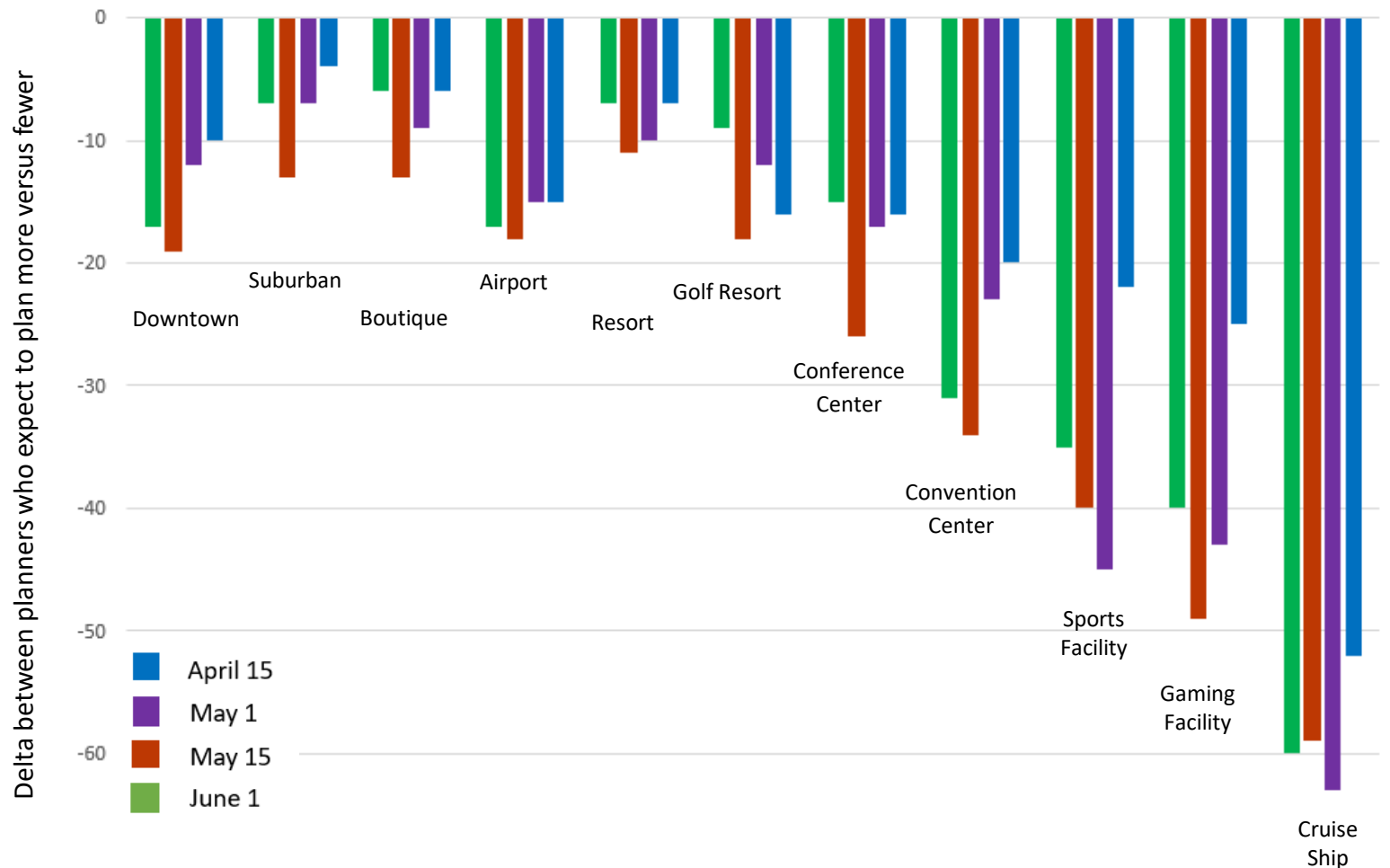
	MORE	FEWER
Trade Shows/Exhibitions/Congresses	3.65% 11	39.20% 118
Association	5.73% 16	24.73% 69
Corporate	7.85% 26	39.88% 132
Government	9.26% 10	41.67% 45
Social, Military, Education, Religion, Fraternal	11.56% 17	31.97% 47
Sports/Esports	15.05% 14	41.94% 39
Festivals/Fairs	6.59% 6	50.55% 46



All venues benefit from the new optimism, with suburban hotels, boutique hotels, resorts and golf resorts well-positioned

June 1 Responses

	MORE	FEWER
Downtown Hotel	5.22% 25	22.34% 107
Suburban Hotel	11.61% 41	18.70% 66
Boutique Hotel	15.81% 52	22.49% 74
Airport Hotel	10.08% 26	27.13% 70
Resort	14.51% 55	21.64% 82
Golf Resort	12.08% 32	21.89% 58
Conference Center	9.52% 34	26.33% 94
Convention Center	9.00% 28	30.23% 94
Sports Facility/Stadium/Arena	8.11% 12	43.24% 64
Gaming Facility	8.26% 10	48.76% 59
Cruise Ship	6.52% 6	67.39% 62
Other	22.22% 22	24.24% 24

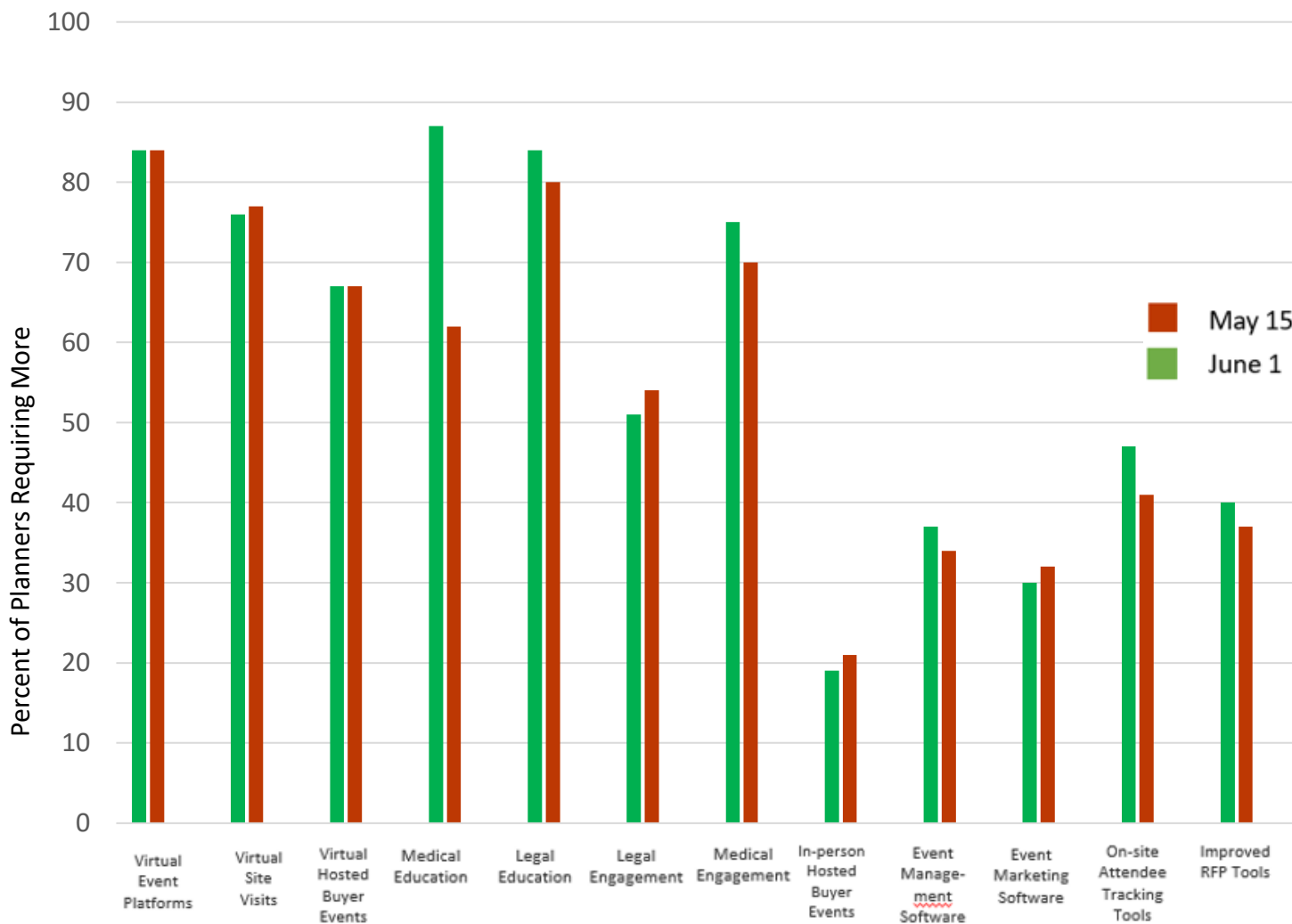


“Virtual” is real, as is the need for legal and medical education/engagement

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

June 1 Responses

	MORE		MORE
Virtual event platforms	84.36% 437	On-site registration tools to minimize crowding and touch points	78.51% 391
Virtual site visits	76.33% 358	Event management software	36.77% 157
Education specific to legal matters	67.12% 294	Event marketing software	30.41% 111
Education specific to health/medical safety matters	83.65% 394	On-site attendee-tracking tools	46.89% 181
Engagement of professional legal advisory services	51.79% 217	Improved RFP tools	38.73% 153
Engagement of health/medical safety advisory services	75.58% 325		
In-person, hosted-buyer events and fams to support buying decisions	18.88% 71		
Virtual hosted-buyer events and fams to support buying decisions	66.86% 226		

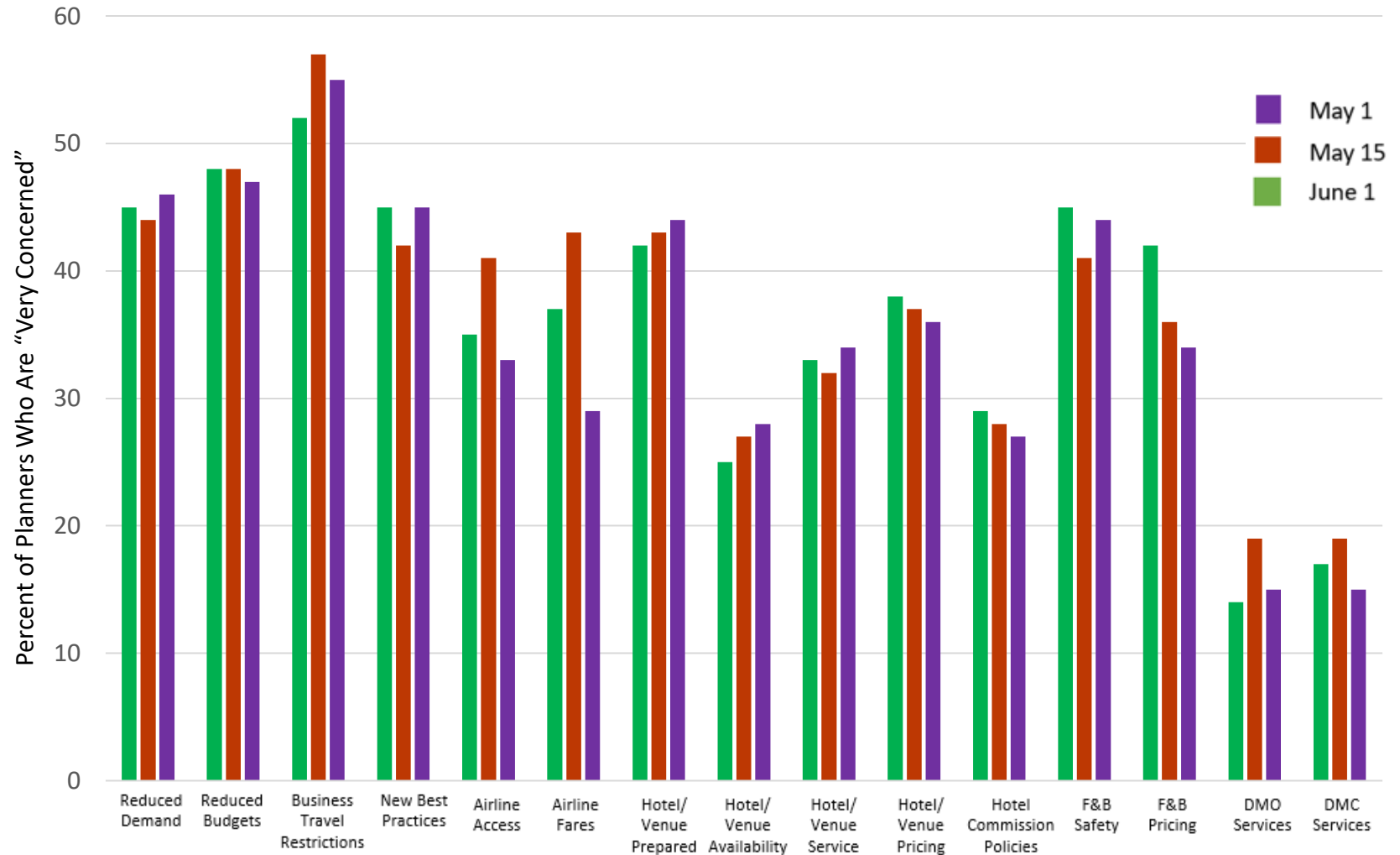


Planners are “very concerned” about a lot of things, but there’s increased concern for F&B safety and pricing, and business travel overall

How concerned are you about the following?

June 1 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	44.94% 253	Hotel and venue availability	25.27% 141
Reduced meeting and event budgets	48.04% 270	Hotel and venue service levels	33.57% 186
Travel policy updates restricting business travel	51.72% 285	Hotel and venue pricing and rates	38.67% 215
New best practices for gatherings	44.40% 246	Hotel commission policies	28.79% 131
Airline accessibility	35.38% 190	Food-and-beverage safety	45.62% 255
Airline fares	37.48% 199	Food-and-beverage pricing	42.01% 234
Hotel and venue health and safety preparedness	42.07% 236	DMO availability and service levels	14.59% 55
		DMC availability and service levels	16.67% 66



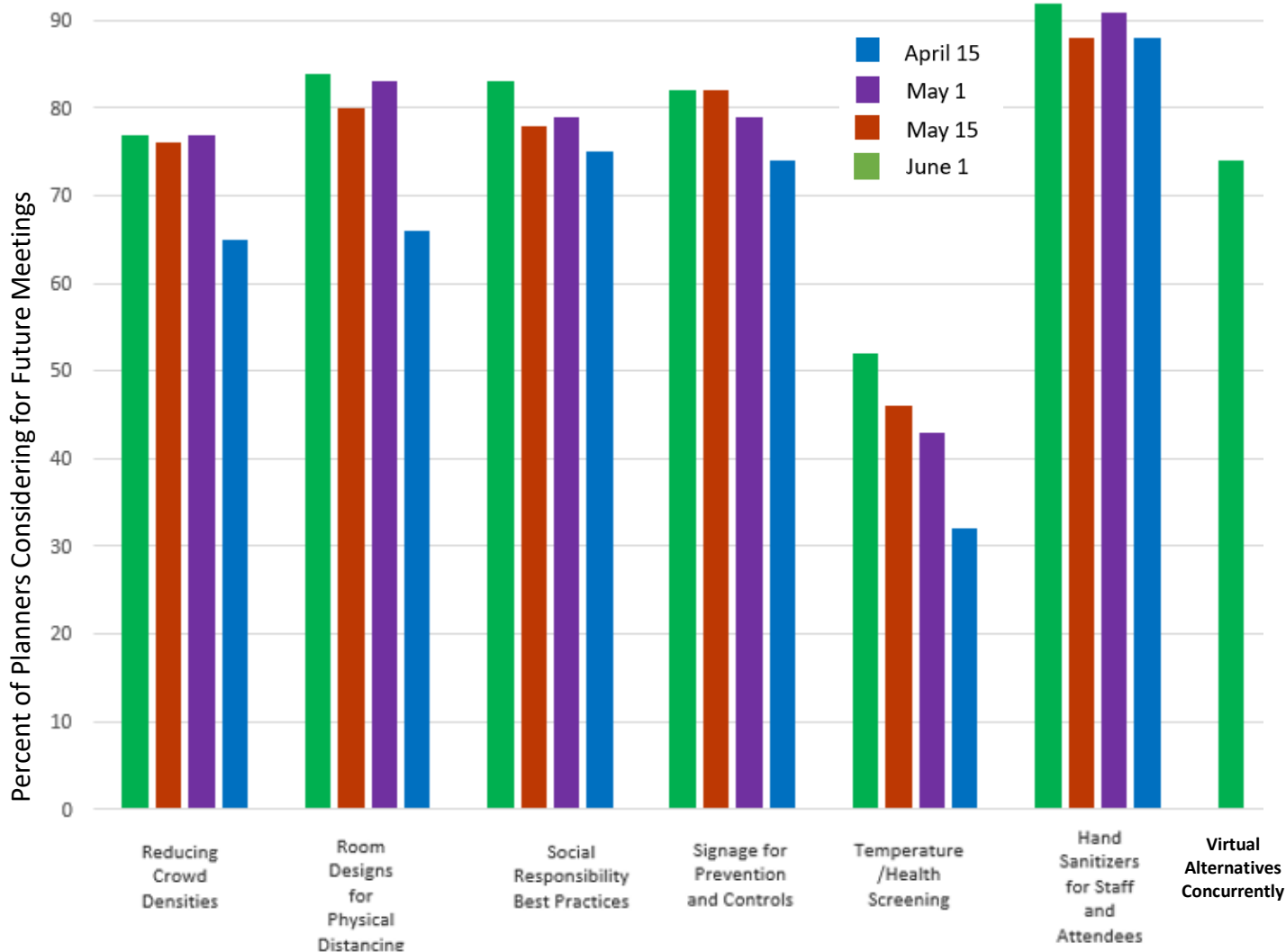
Temperature screening is on the rise, while 3 out of 4 planners consider virtual hybrids

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

June 1 Responses

ANSWER CHOICES	RESPONSES	
Reducing and managing crowd densities	77.57%	446
Developing meeting room designs to encourage physical distancing	83.83%	482
Putting into place social responsibility best practices, including protocols for attendees who are ill	82.78%	476
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	81.91%	471
Providing temperature/health screening	52.00%	299
Providing hand sanitizer on-site for staff and attendees	93.04%	535
Providing virtual alternatives concurrently with physical events	74.43%	428
None of the above	2.78%	16
Other (please specify)	4.70%	27

Total Respondents: 575

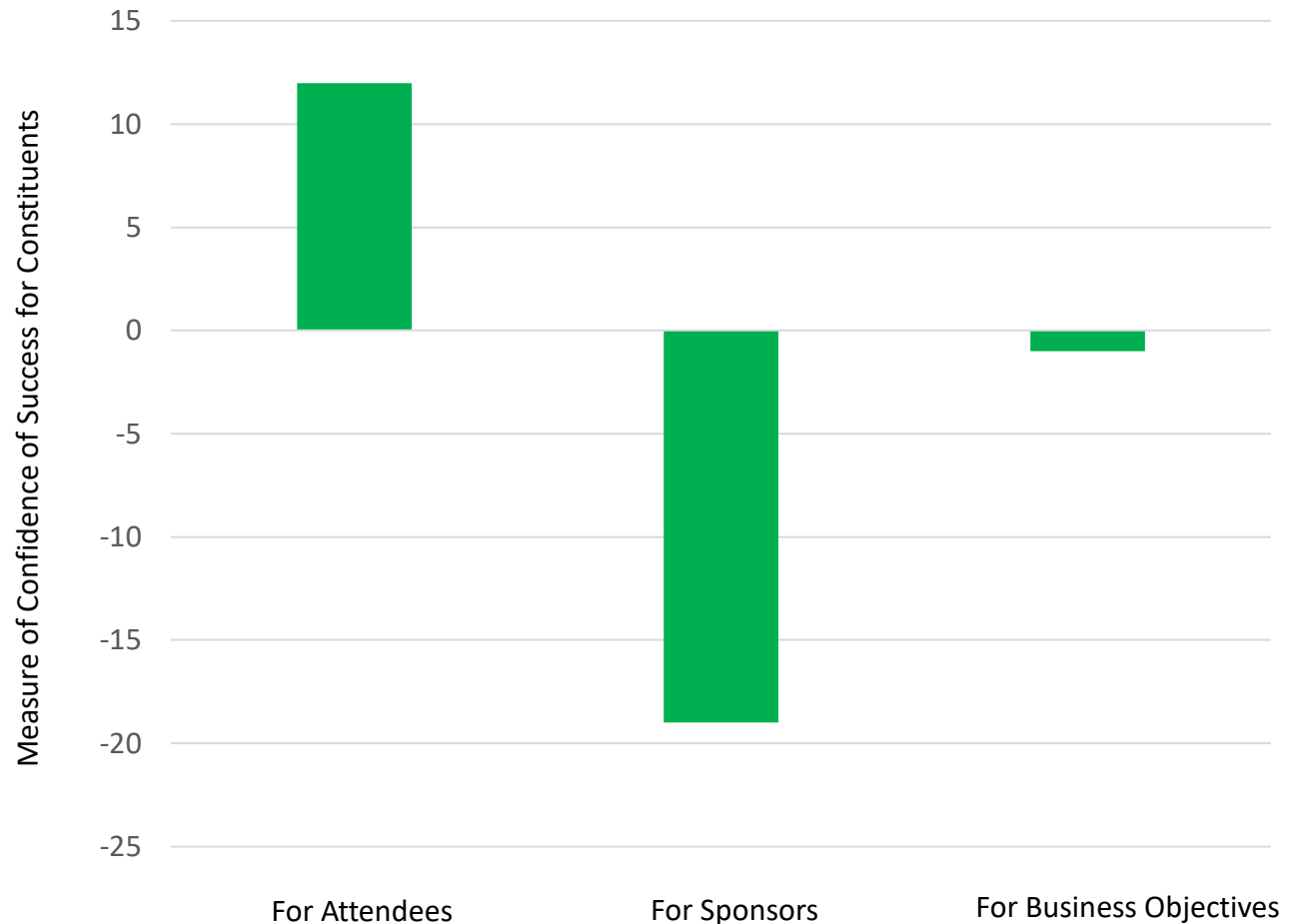


Planners express uncertainty about the success of their virtual events

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	26.61% 149	35.18% 197	38.21% 214
For sponsors	48.52% 262	31.67% 171	19.81% 107
For business objectives	31.45% 173	37.45% 206	31.09% 171
Not applicable	68.85% 84	16.39% 20	14.75% 18



In Summary:

- ✓ Business bounce?: Shift in planners moving from looking to booking
 - ✓ Previous “too soon to know” planners skewing to optimism
 - ✓ Rescheduled events have moved to ‘21
 - ✓ New events moving to back half of ‘21 and later
 - ✓ Planners now bullish on regional and local events
 - ✓ Suburban, boutiques and resorts positioned to benefit from new optimism
 - ✓ Virtual is real
 - ✓ Can you accomplish your business objectives virtually? Planner aren’t sure
- “Our responsibility is to provide the duty of care necessary to protect the health and safety of our clients and participants. We expect that all travel suppliers provide information and participate similarly, at the highest levels.”
 - “I wish I knew the answers with more certainty. Our company relies heavily on our event profits and I think we are going to have a hard time getting exhibitors and customers to invest and attend for the next year. I am concerned about the contracts I have in place.”
 - “One concern is different state rules; what might be applicable to one state might not be for the state the meeting is being hosted in. Who is going to keep track and know if you are complying with all state regulations?”
 - “The differences state to state and country to country are a concern as a global organisation. Rules and regulations vary wildly at present and this makes it hard for (some) attendees to know the right approach.”
 - “Confidence levels across the board - clients, suppliers, audiences, organisers have plummeted. We need to slowly build confidence across all stakeholders to get back to anywhere near the 1st March 2020 position.”

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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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Updated May 19, 2020, 1:05 p.m. EDT Italy, Ireland, Mexico and Portugal are...

May 19, 2020

PULSE SURVEY



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