

# PULSE SURVEY

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

August 15, 2020



## EXECUTIVE SUMMARY

**With coronavirus cases declining in the United States**, it's not surprising that Northstar Meetings Group's latest PULSE Survey reveals slight but encouraging gains in industry expectations.

Comprised of more than 800 planner responses from around the world, with just over 80 percent of them responsible for events in the United States, the PULSE Survey shows that planners are generally confident and rebooking activity is on the upswing. However, far fewer planners are expecting to produce in-person events in 2020, and most planners believe the second quarter of 2021 is the earliest they are likely to produce such gatherings. Fear remains the biggest obstacle; not just fear of travel, which impacts the viability of business events, but also the fear that uncertainty brings.

Highlights from this research cycle include:

- Booking and sourcing activity has increased since the last PULSE Survey, albeit slightly.
- Planners are generally confident. On a scale of 1 to 10, with 10 being most confident, planners' confidence level for their immediate future averages 6.25. There is no material difference in confidence levels across regions and among planners responsible for meetings in the United States, United Kingdom, Europe and Asia.
- Local and regional events, and events of 100 or fewer attendees, have gained favor, as planners indicated they will plan more of them next year.
- Boutique hotels and resort properties currently are the most favored venues for near-term meetings.
- On-site technology tools are growing in interest relative to virtual, indicating a growing confidence in the return of physical events.
- Face masks and other safety protocols are now accepted as "industry standards," but testing — either on-site or prior to events — is not seen as a requirement.
- Planners are accepting digital events as solid options, and that they need to make virtual events an ongoing component of their portfolios. They are beginning to gain confidence in the business potential for virtual events.



# PULSE SURVEY



Clearly, the meetings industry is in a state of flux. Confidence levels for the near-term future ebb and flow with Covid-19 case levels, with business-travel restrictions and with the perception of the value of in-person events compared to virtual alternatives. Most respondents agree those alternatives not only are here to stay, but also will improve over time. One takeaway is unanimous: As soon as it is possible, planners want to get back to meeting face-to-face again.

"I do believe we've started to see a turn in the negativity over the past five to six weeks, and more of an opening and positivity, and a push toward hosting events that are already scheduled," said Paul Van Deventer, president and CEO of Meeting Professionals International. "However, planners might be more open to hosting or encouraging live events because it's what we do. We recognize the need and value of live events, the innovation and creativity that comes from them. We're benefitting from the quick dive into hybrid events, but we're also seeing the limitations."

"I think people are still very much trying to figure out their own organizational priorities as they relate to their workforces," said Amy Calvert, CEO of the Events Industry Council, the umbrella organization that represents more than 30 member industry associations. "I would be cautiously optimistic. I think organizations are very much wanting to get back to the business of meeting face-to-face again; people are feeling a bit burnt out on this whole Zoom endeavor."

As planners have had to learn how to move their events online, 76 percent of respondents said they are anticipating the need to provide virtual alternatives concurrently with physical events in the future. As one respondent commented, "There is no longer a 'going back to normal.' I'd like to be part of shaping the 'new normal,' but I don't know where to begin."

That "new normal" is already here, as evidenced by the growing numbers of virtual events already being produced worldwide, and the overwhelming majority of planners who report they will require virtual platforms for the foreseeable future, according to the latest PULSE Survey results.

Already employers are looking for planners with experience in this area. Dawn Penfold, president of [MeetingJobs.com](https://www.meetingjobs.com), an industry job board, recently received notice of two planner openings — the first such listings since the lockdowns began — both of which require candidates to have skills related to producing hybrid face-to-face and digital events.

NMG's PULSE Survey, launched in March 2020, tracks how the global pandemic has affected meeting planners, including their job status, business plans and projections for the future of their events.





# PULSE SURVEY



Following are additional findings from the Aug. 25 Northstar Meetings Group PULSE Survey.

## **STILL WORKING HARD**

The vast majority of respondents to the current survey (84 percent) still are employed, with 62 percent working remotely and 22 percent working from their offices. Those surveyed also report that their current focus continues to be on rescheduling events (55 percent), while many are researching potential new events but not ready to issue an RFP or lead (29 percent). Just over 10 percent of the sample has been furloughed to some degree.

## **TIME IS RUNNING OUT ON 2020**

In our July 15 survey, just 25 percent of meeting planners were expecting to hold rescheduled events this year, down from 40 percent in the June 17 cycle. Only 16 percent now expect to produce live meetings or events for the balance of the year. The second quarter of 2021 is seeing the most action, as 34 percent of planners working on rescheduling are moving events there, and 22 percent are working on new meetings for Q2. The first quarter of 2021 also is seeing plenty of activity, as 23 percent of those surveyed are rescheduling meetings then, along with 21 percent of those working on new events.

## **GOING ONLINE**

Planners acknowledge they need to make digital gatherings an ongoing component of their portfolios, as 76 percent of those surveyed said they will require virtual-event platforms for the foreseeable future. As more is being learned about virtual events, more planners are gaining confidence in their business potential.

## **KEEPING SAFETY IN MIND**

Face-mask requirements and safety protocols are accepted as "industry standards" now — 77 percent of those surveyed say they are now requiring face coverings for all — but testing for the virus, either on-site or prior to events, is not seen as a requirement.



# PULSE SURVEY



## RESPONDENTS ARE RESHAPING THEIR VIEWS

In verbatim comments, some planners showed enthusiasm for the changing nature of the industry.

As one planner said, "This is an exciting time in our industry. We can finally showcase the strategy that should have existed all along. The folks who think of themselves as 'planners' might not have a future here. But the folks who think of themselves as strategic advisors and producers will thrive."

And some noted they have been able to host in-person events successfully, taking all the necessary precautions:

"I just held my annual event with significant safety protocols in place. It worked," was one comment.

"We just hosted an annual local meeting," reported another planner. "We capped attendance to allow for 6 feet of social distancing, temperature checks, waivers and masks. We received nothing but compliments and there have been no Covid cases reported."

PULSE SURVEY



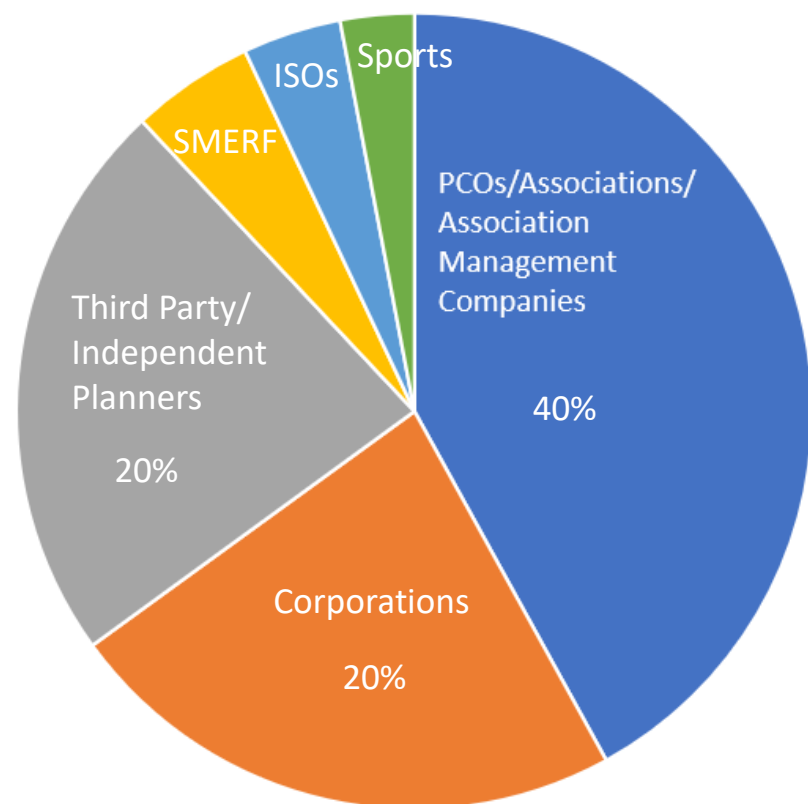
# **THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19**

WEDNESDAY, AUGUST 26, 2020



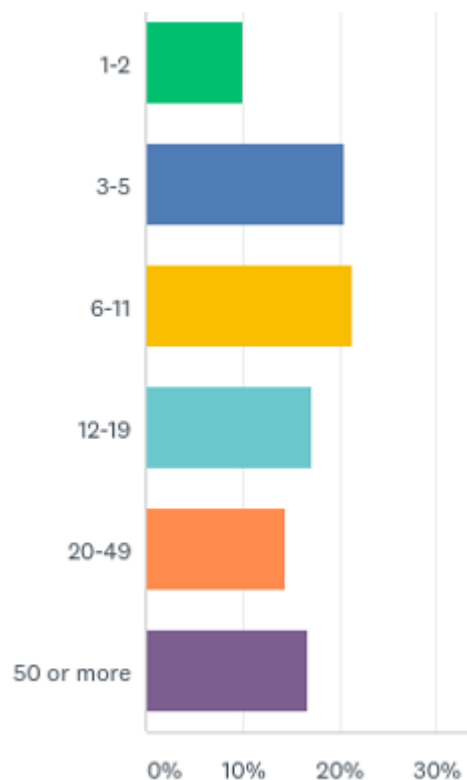
**NORTHSTAR**  
MEETINGS GROUP

## Respondents By Type, Volume and Size



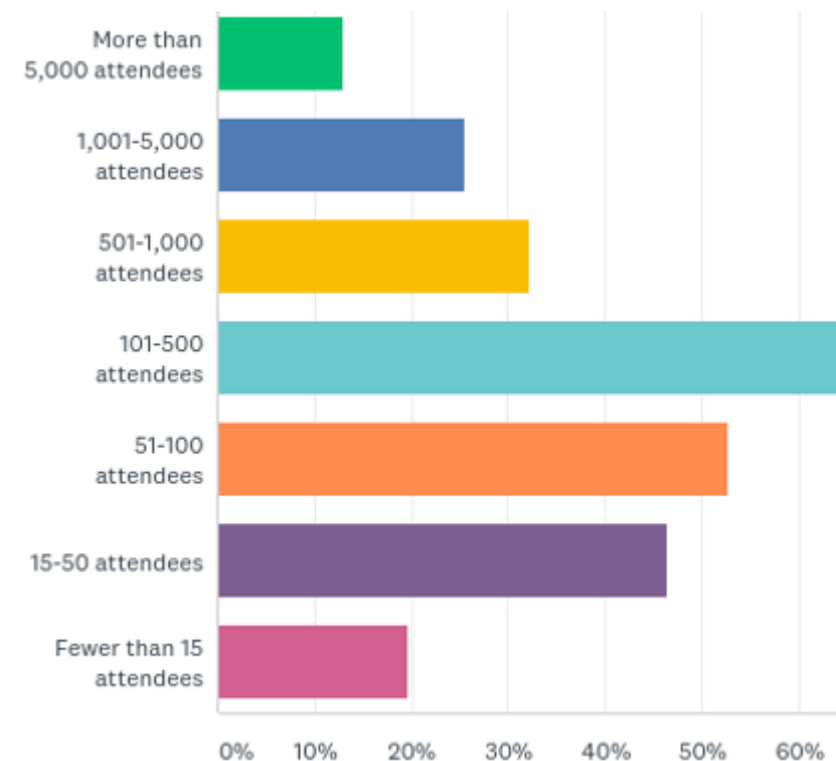
Type

August 25, 2020



# of Meetings

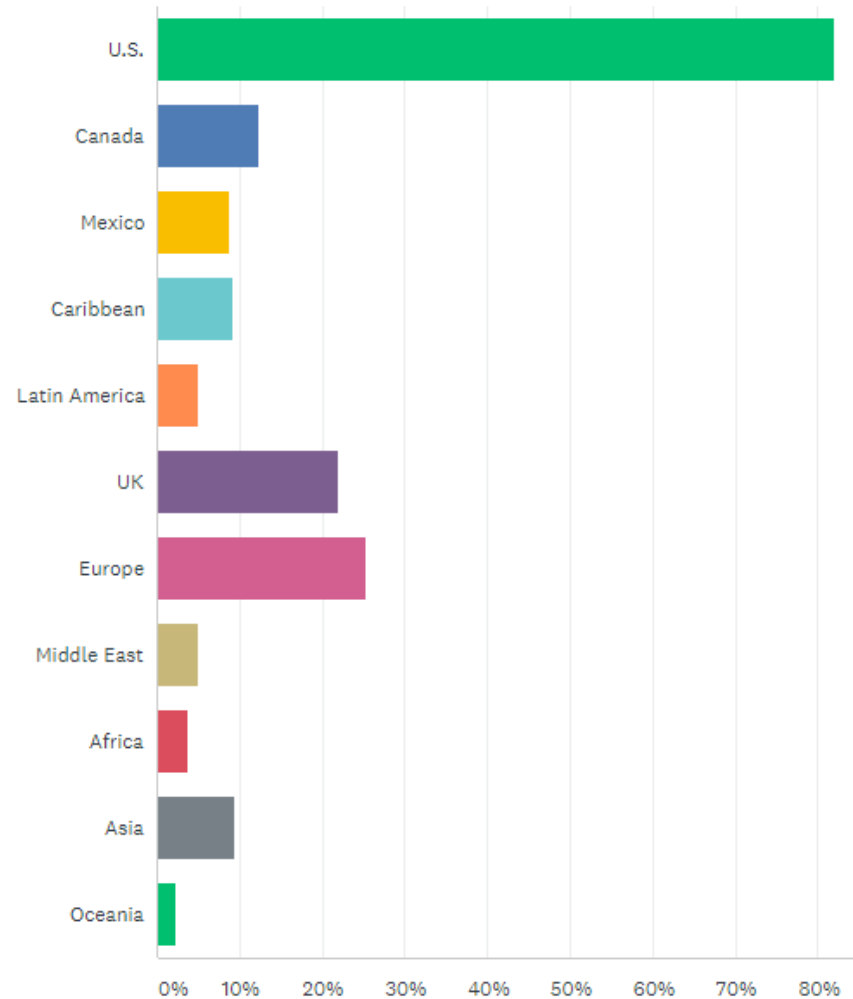
819 Valid Planner Responses



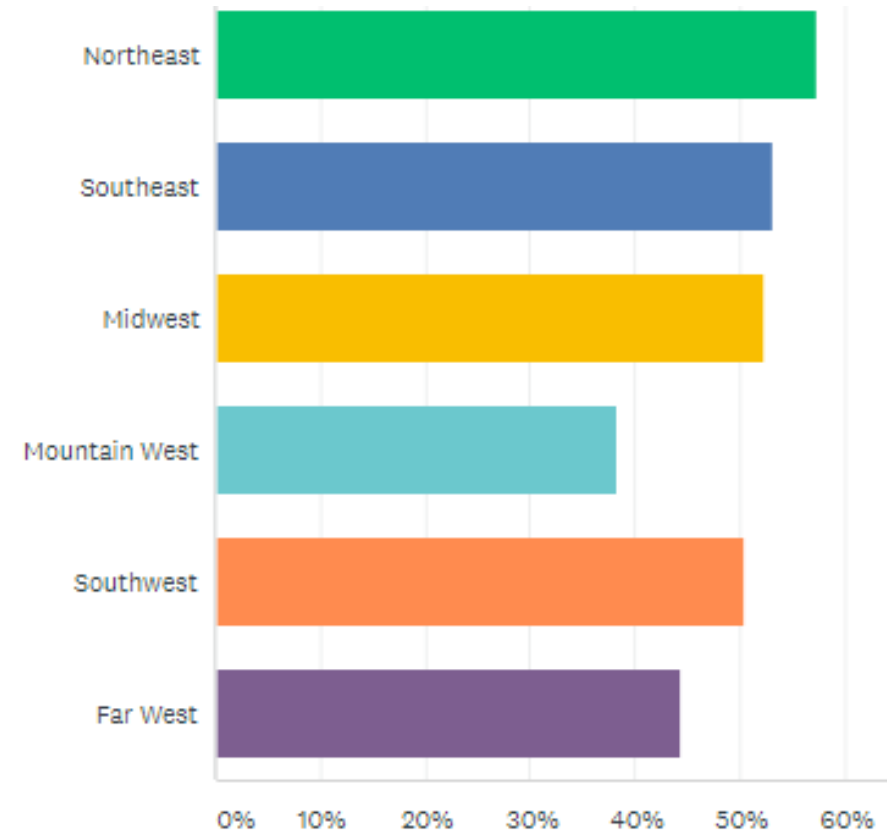
Size of Meeting



## Respondents by Meeting Location



### US Meeting Locations

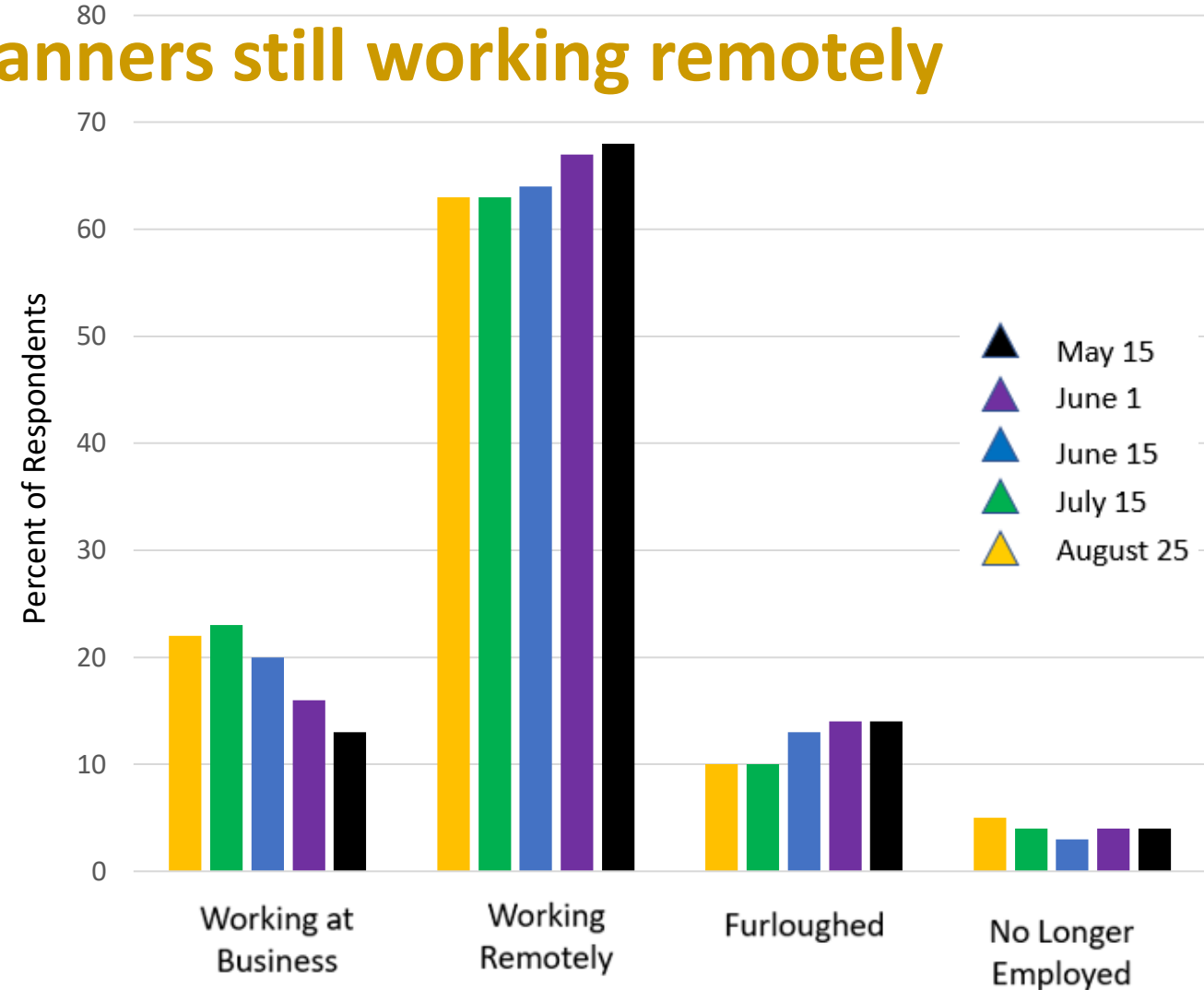




## No changes to working locations, with the majority of planners still working remotely

### August 25 Responses

Working full time at a business location	21.52%
Working full time remotely	62.60%
Furloughed, I remain employed but I am now working part-time.	6.30%
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	1.84%
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	3.02%
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	3.67%
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.	1.05%

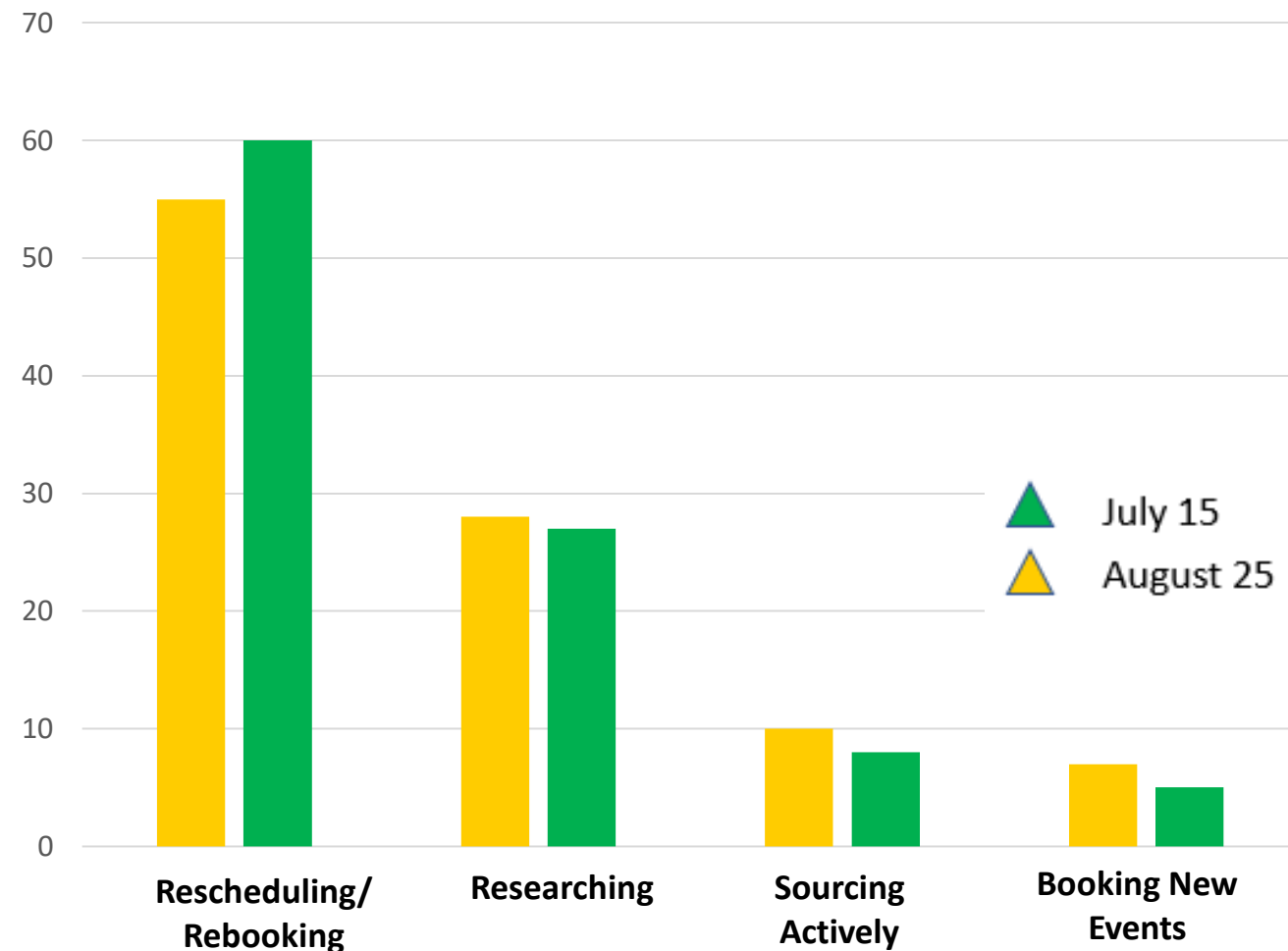


# Rebooking Continues to Be the Primary Focus

## Though New Booking and Sourcing Activity Rises from July's Low

### August 25 Responses

I am rescheduling or rebooking events.	54.96%
I am researching potential new events, but not ready to issue an RFP or lead.	27.84%
I am actively sourcing (issuing RFPs or leads) for new events.	9.93%
I am booking new events.	7.27%



# Regardless of Event Location, Planners' Primary Focus Continues to Be Rescheduling

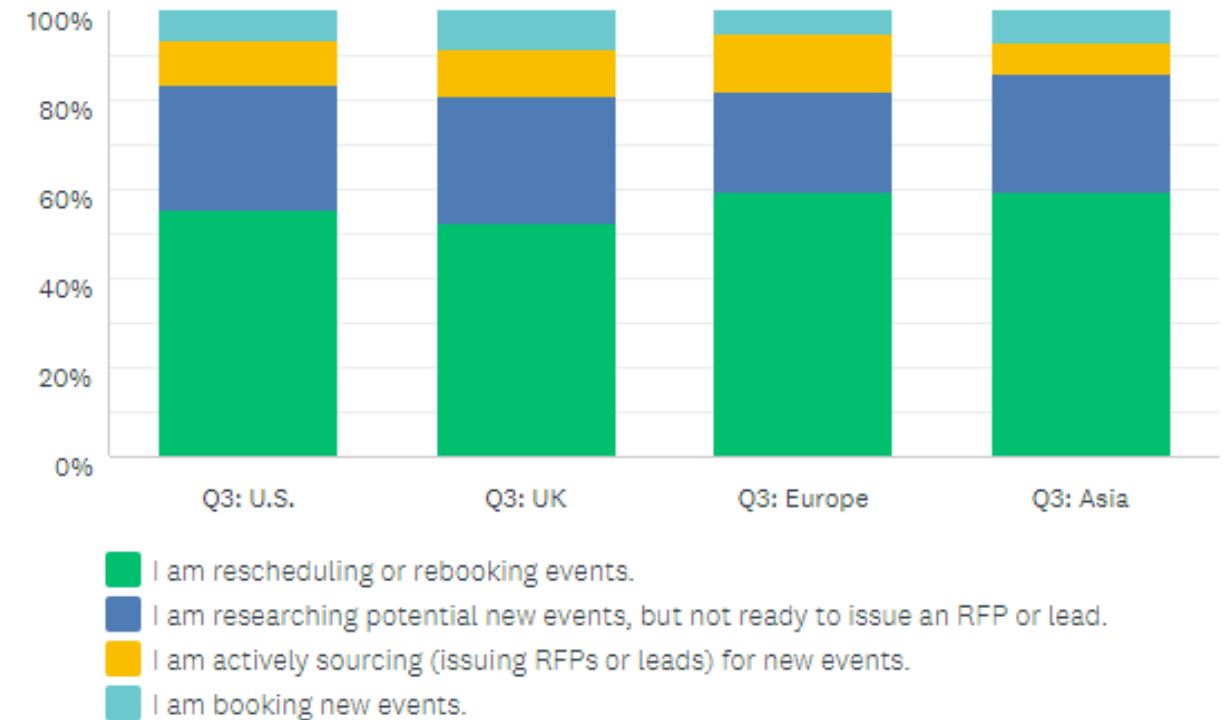
What is your current primary focus?

Are you rescheduling, booking, or researching?

August 25 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.
Q3: U.S.	55.32% 265	28.39% 136	9.60% 46	6.68% 32
Q3: UK	52.38% 66	28.57% 36	10.32% 13	8.73% 11
Q3: Europe	59.59% 87	22.60% 33	13.01% 19	4.79% 7
Q3: Asia	59.65% 34	26.32% 15	7.02% 4	7.02% 4

Percent of Respondents

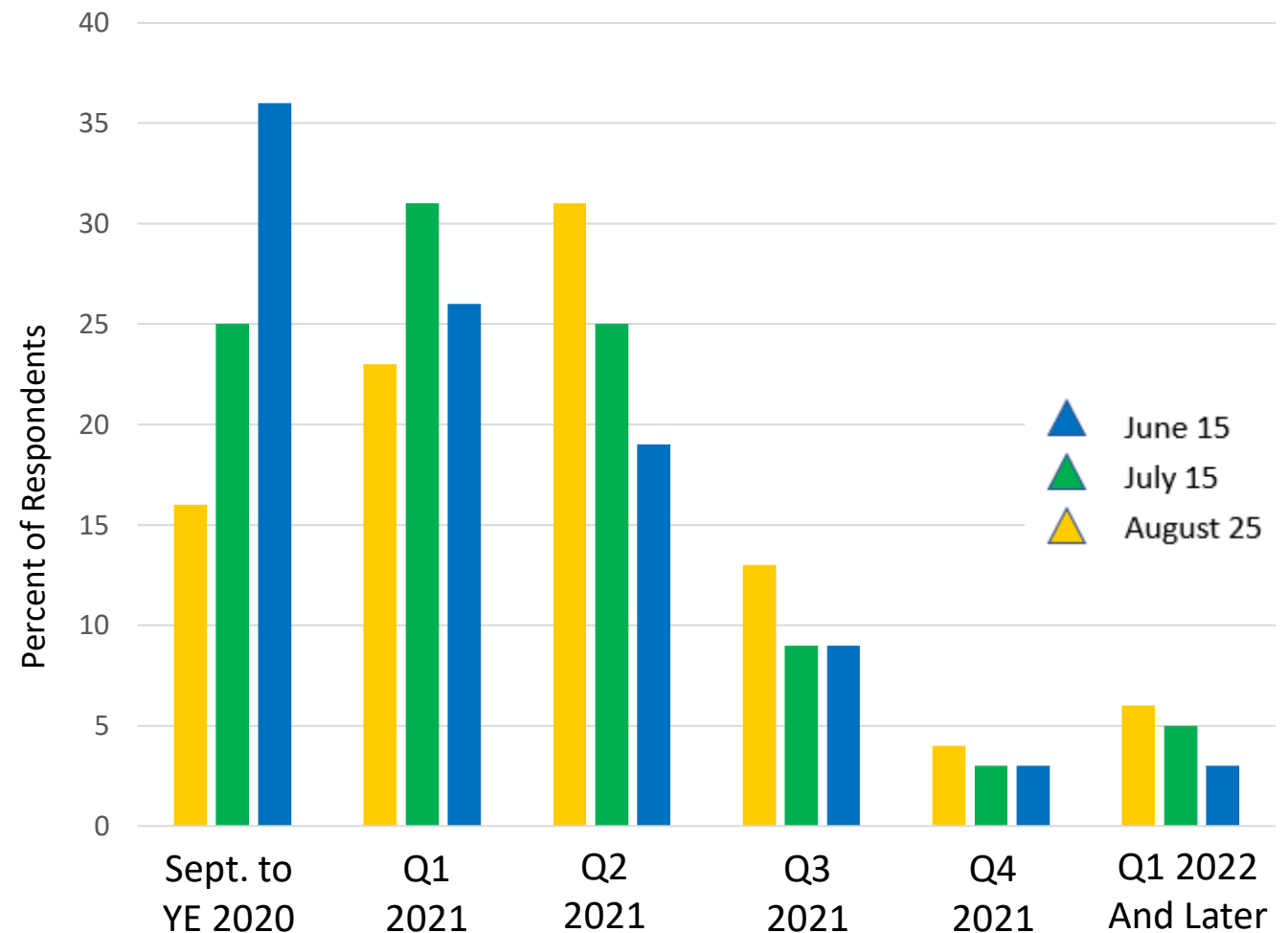


# Majority of Planners Rescheduling for Q2 '21

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

August 25 Responses

September to Year-End 2020	16.23%
Q1 2021	23.28%
Q2 2021	31.39%
Q3 2021	12.70%
Q4 2021	3.70%
Q1 2022 and later	6.00%



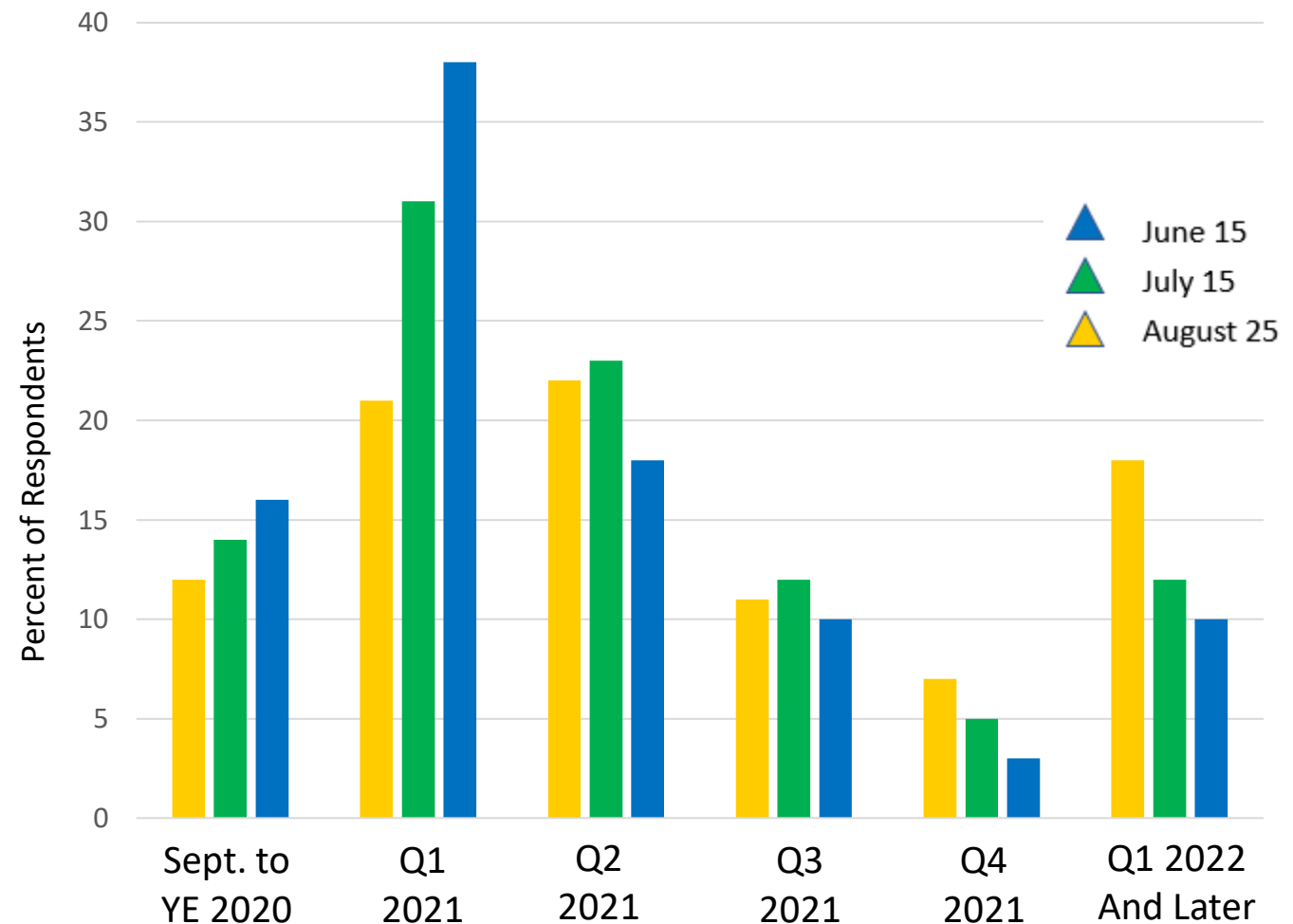


# Big Shift Seen for New Meetings to 2022

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

August 25 Responses

September to Year-End 2020	11.99%
Q1 2021	20.99%
Q2 2021	22.22%
Q3 2021	10.93%
Q4 2021	6.70%
Q1 2022 and later	17.81%

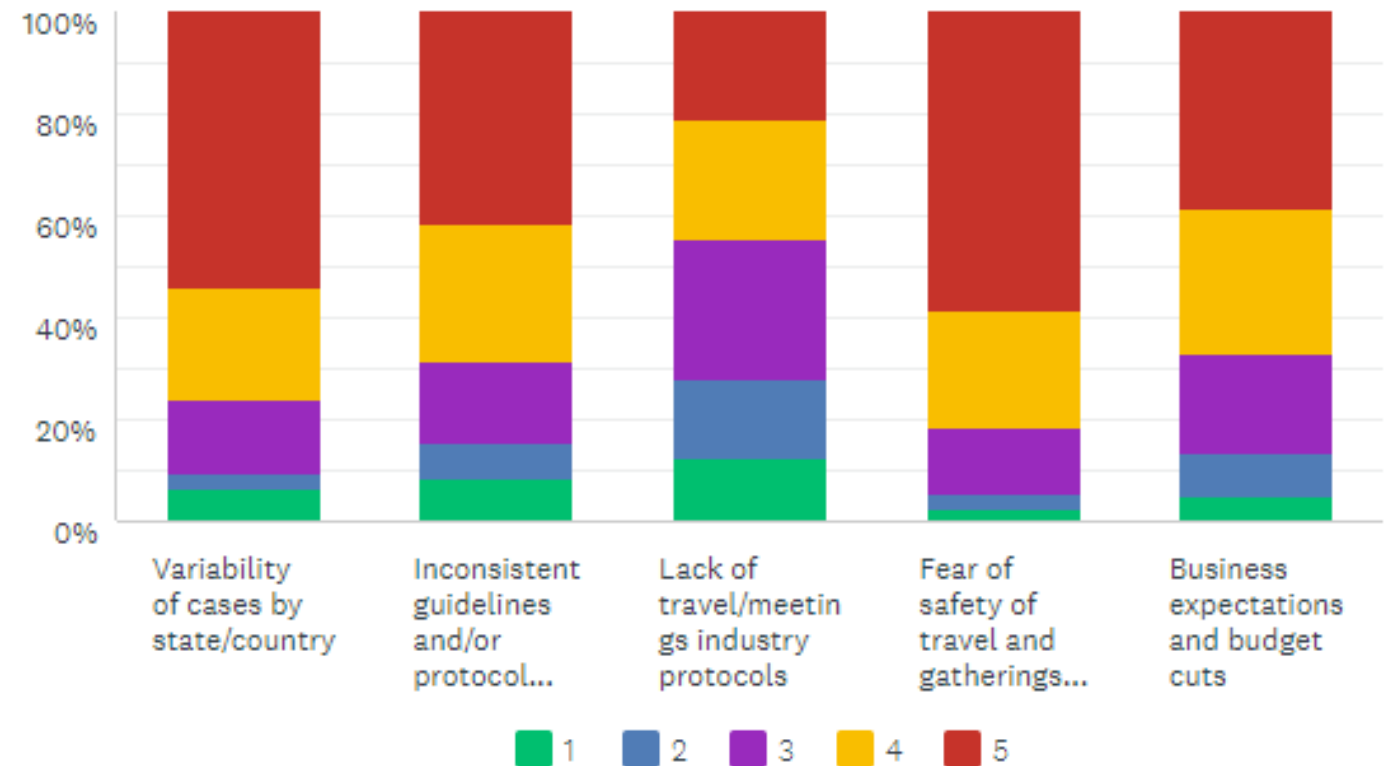


# Fear is the Biggest Obstacle

**87% report it significantly affects their ability to plan live events in the near-term**

**Factors that are affecting planners' ability to plan live events in the near-term (1 = not at all; 5 = very significantly)**

	1	2	3	4	5
▼ Variability of cases by state/country	6.51% 37	2.99% 17	14.44% 82	22.18% 126	53.87% 306
▼ Inconsistent guidelines and/or protocol enforcements by state/country	8.55% 49	6.81% 39	16.23% 93	27.05% 155	41.36% 237
▼ Lack of travel/meetings industry protocols	12.39% 71	15.71% 90	27.40% 157	23.56% 135	20.94% 120
▼ Fear of safety of travel and gatherings, regardless of protocols	2.43% 14	3.30% 19	12.70% 73	23.30% 134	58.26% 335
▼ Business expectations and budget cuts	5.04% 29	8.35% 48	19.48% 112	28.87% 166	38.26% 220

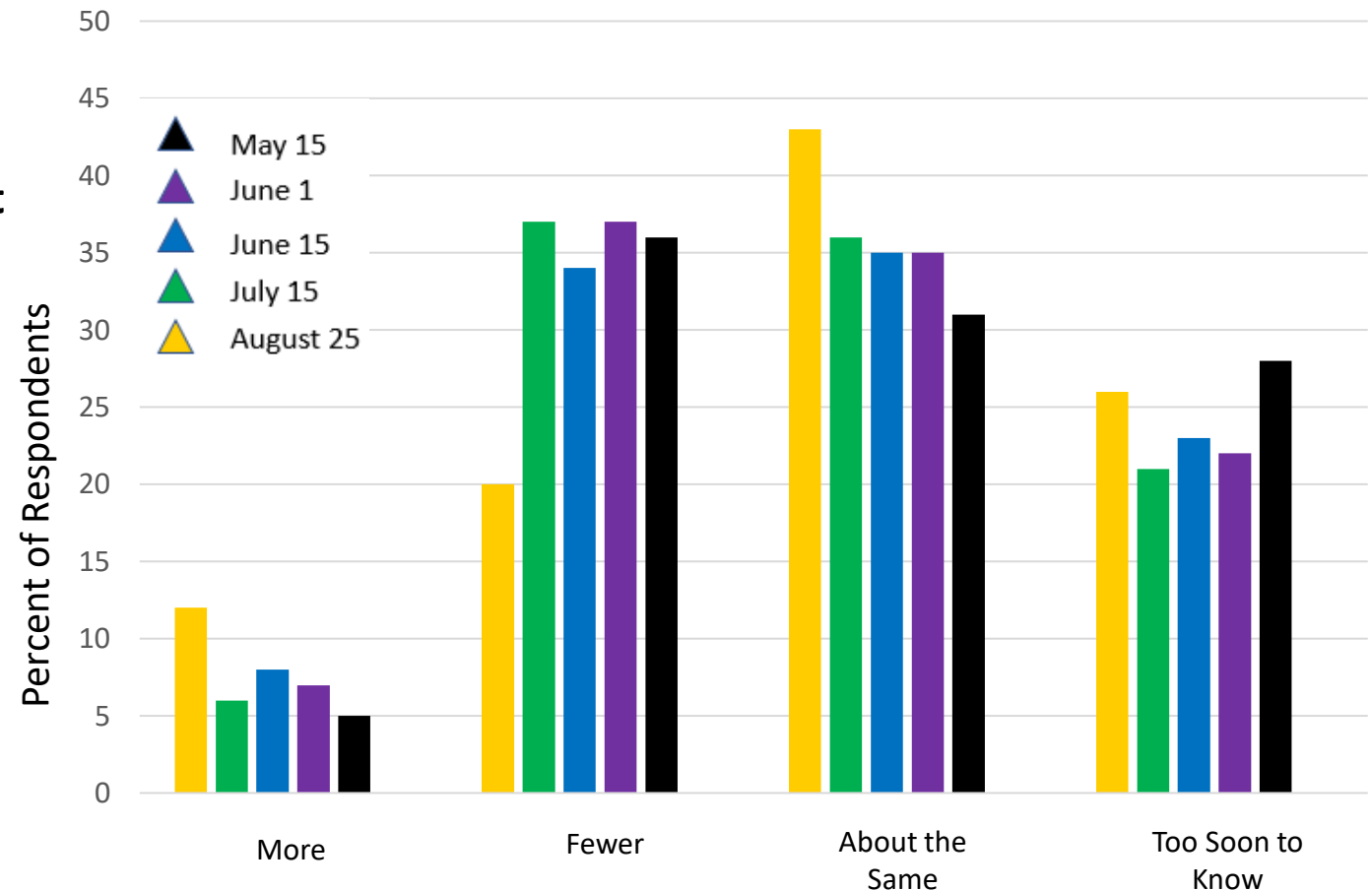


## Light at the End of the Tunnel: Is the Expectation for '21 and '22 Boosting Planner Confidence?

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

### August 25 Responses

▼ More	11.81%
▼ Fewer	19.97%
▼ About the same	42.53%
▼ It's too soon to know.	25.69%



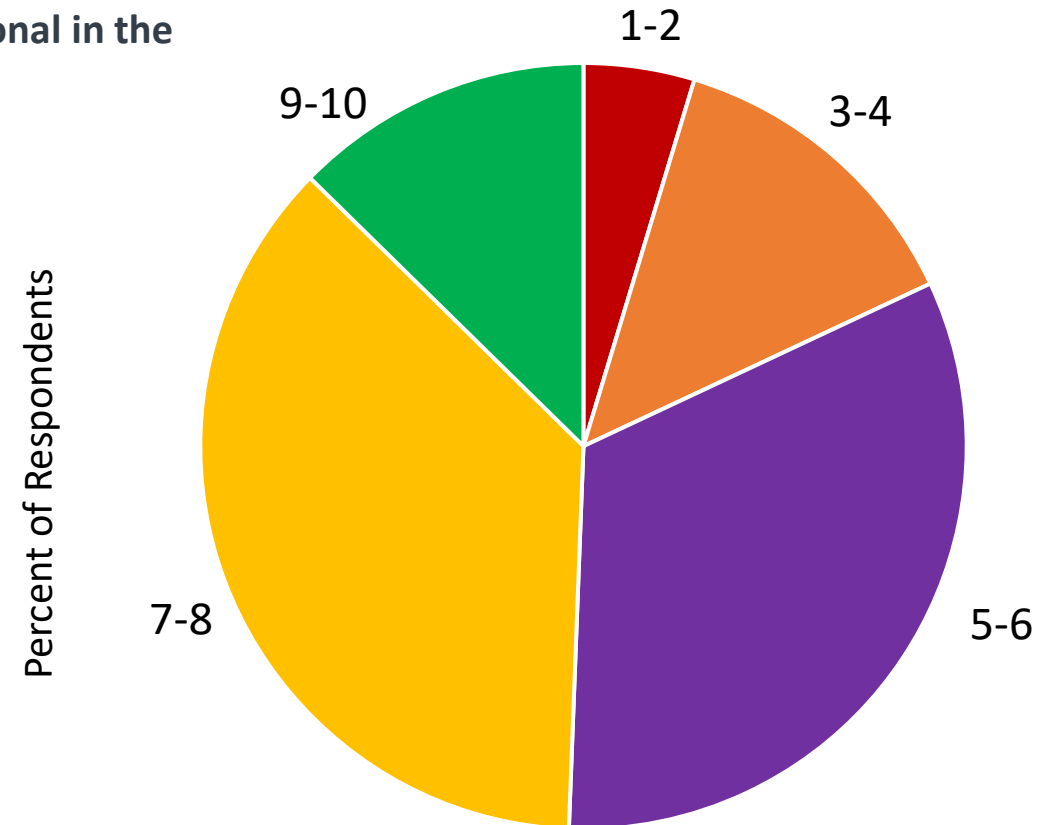
## Light at the End of the Tunnel: Is the Expectation for '21 and '22 Boosting Planner Confidence?

On a scale of 1 to 10, how confident are you about the near-term future (over the next five years) for the meetings and events industry, and your role as a professional in the industry. (1 being not at all confident, 10 being highly confident.)

On a Scale of 1-10:

# 6.25

As of August 25, 2020





# Planners are Generally Satisfied with Industry Leadership in this Time of Crisis

As of August 25, 2020

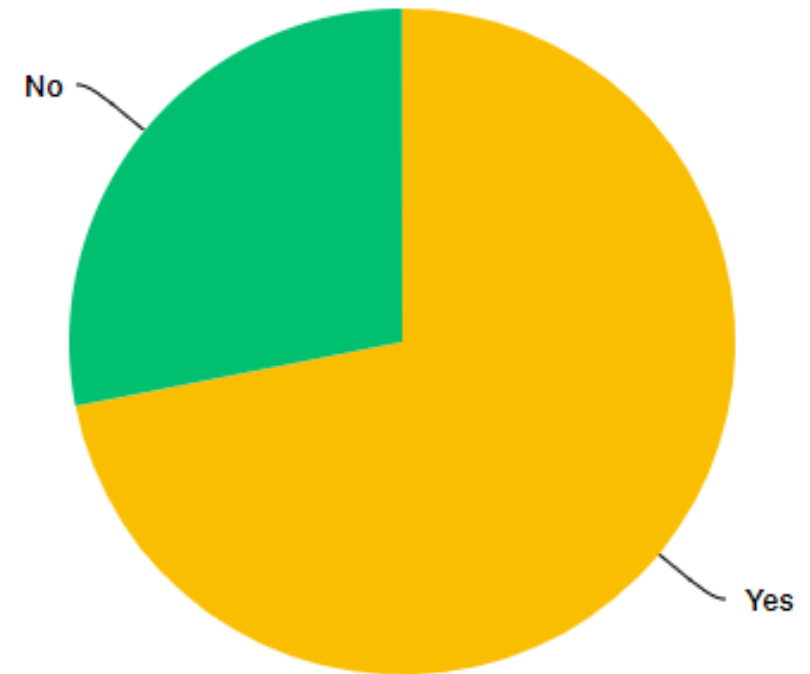
Do you believe industry leadership (associations, organizations, hospitality industry executive leadership, etc.) has responded adequately to address your needs during the crisis?

**72%** Say “Yes”

*“I feel like the major hotels and airlines and associations/councils are working around the clock to get meetings and events back in business. They have done everything they can to help planners navigate what's next.”*

*“The need for a coordinated industry response is greater than ever.”*

Percent of Respondents



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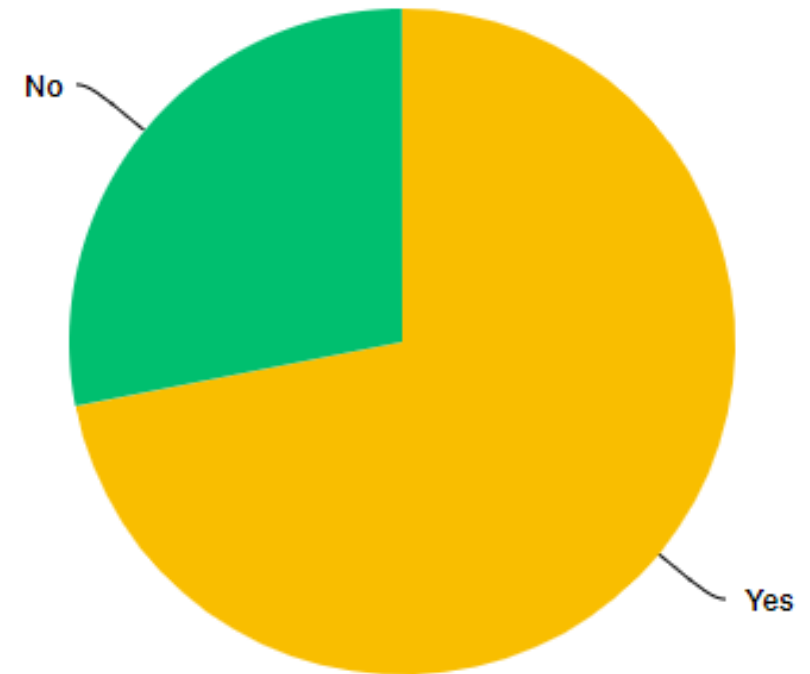
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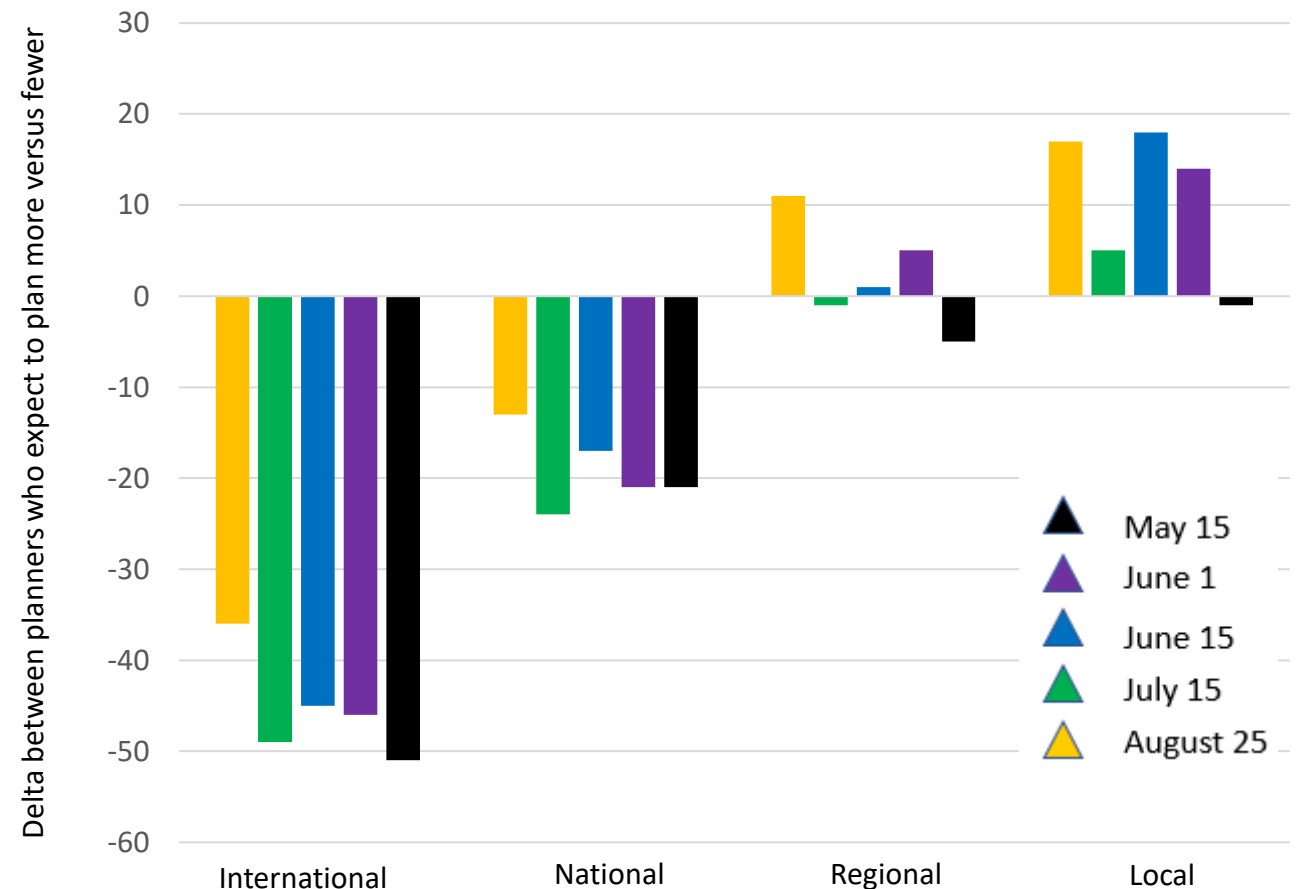
## More or Fewer?

**Planners anticipate more local and regional events (again), and gain confidence in national and international events**

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

August 25 Responses

	MORE	FEWER
International	9.45% 31	45.43% 149
National	12.63% 59	25.48% 119
Regional	28.22% 127	17.56% 79
Local	31.22% 128	13.90% 57



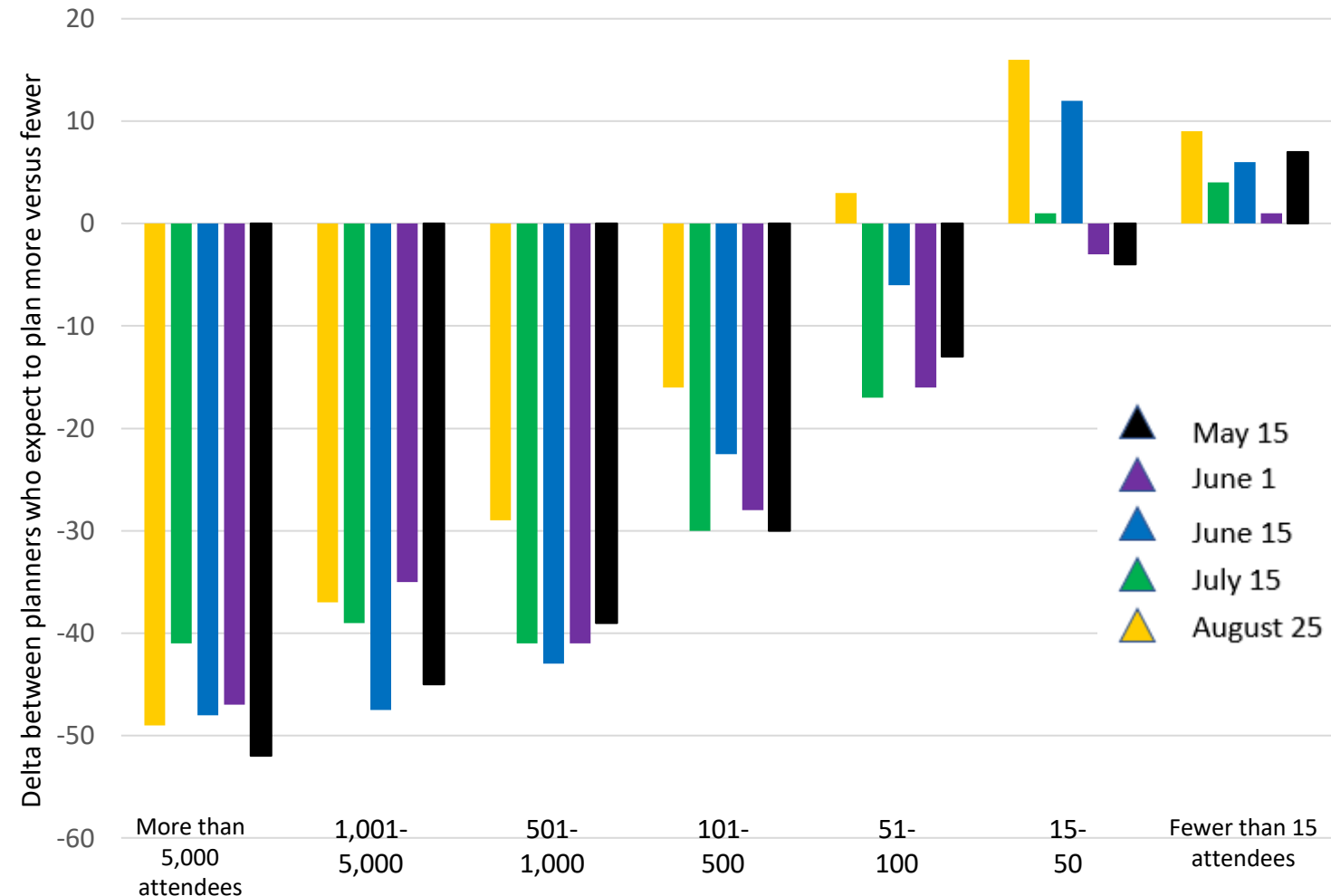
## More or Fewer?

**Meetings < 100 attendees expected to grow in number, while large events remain less likely**

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

August 25 responses

	MORE	FEWER
More than 5,000 attendees	5.46% 10	54.10% 99
1,001-5,000 attendees	4.81% 13	42.22% 114
501-1,000 attendees	8.88% 31	38.11% 133
101-500 attendees	11.40% 57	27.60% 138
51-100 attendees	21.67% 101	18.67% 87
15-50 attendees	30.51% 144	14.83% 70
Fewer than 15 attendees	26.58% 97	18.08% 66





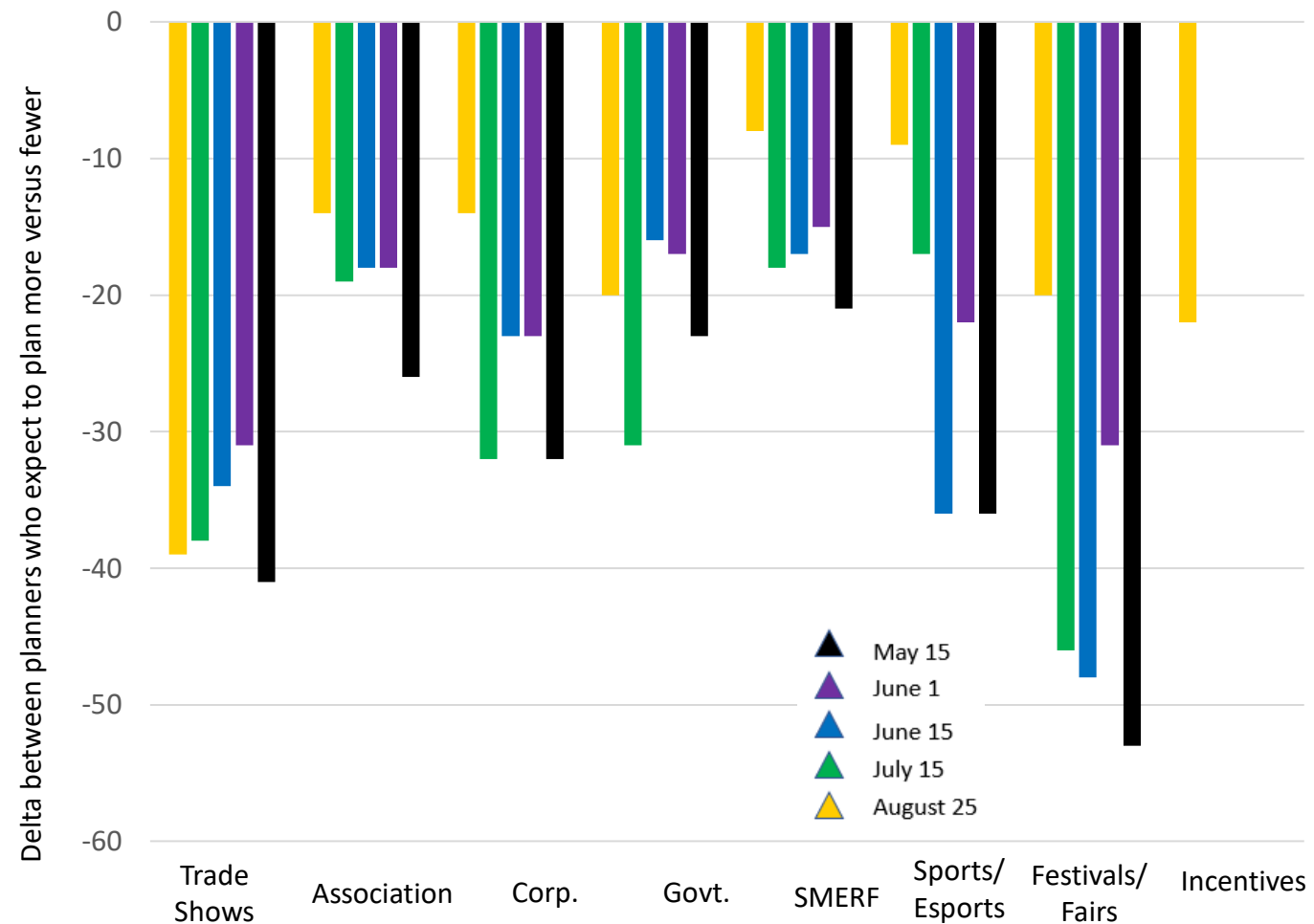
# Prospects for Trade Shows Approach Lowest Levels

## Though Expectations Remain , All Other Event Categories Show Gains

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

July 15 Responses

	MORE	FEWER
Trade Shows/Exhibitions/Congresses	2.68% 11	40.98% 168
Association	7.51% 29	26.42% 102
Corporate	8.94% 38	40.94% 174
Government	10.71% 15	41.43% 58
Social, Military, Education, Religion, Fraternal	13.53% 28	31.40% 65
Sports/Esports	19.57% 27	36.96% 51
Festivals/Fairs	9.02% 12	54.89% 73

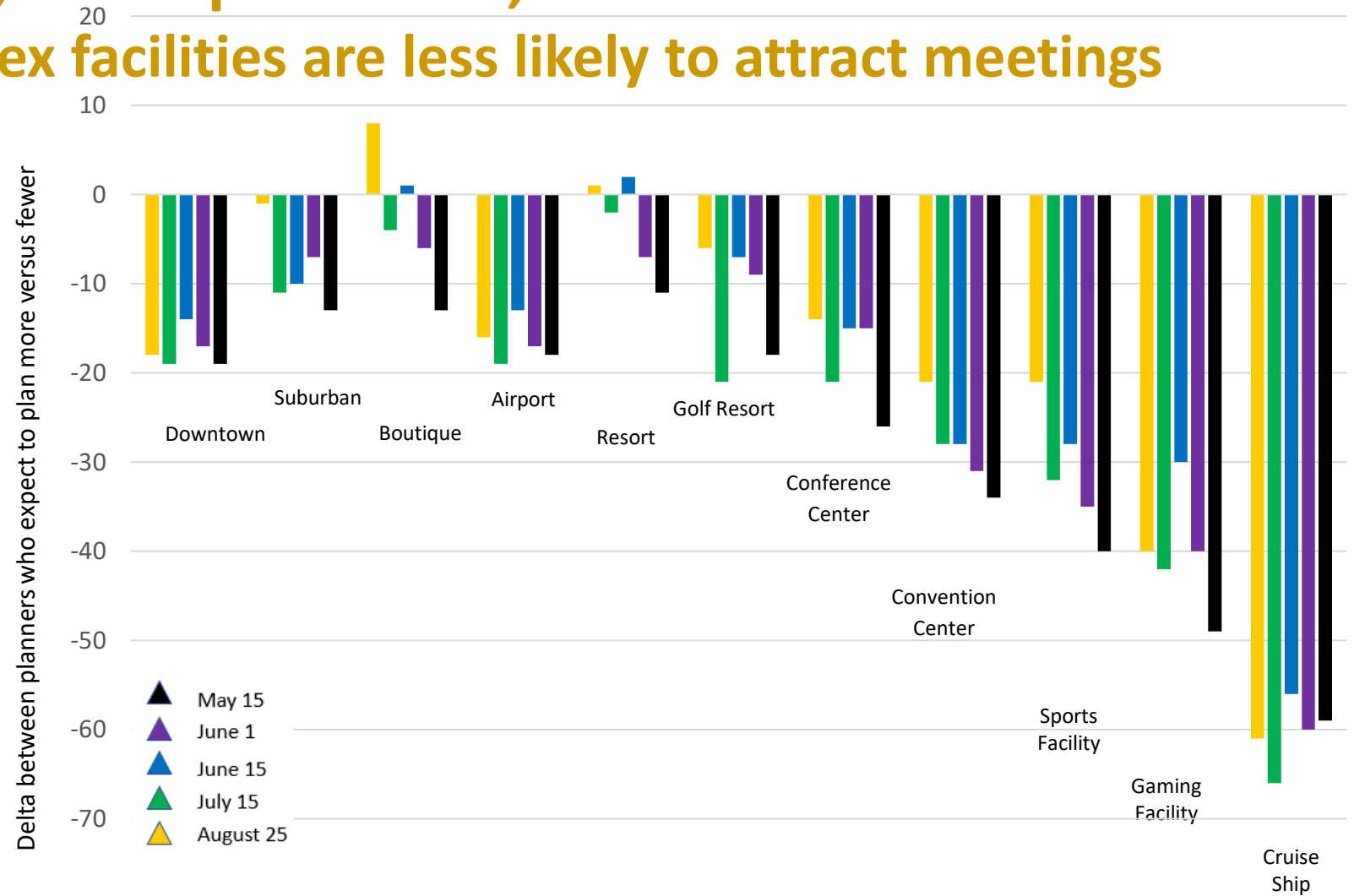


# Among Venue Types, Boutique Hotels, Resorts Increase in Favor

## While large, complex facilities are less likely to attract meetings

### August 25 Responses

	MORE	FEWER
▼ Downtown Hotel	6.32% 32	23.91% 121
▼ Suburban Hotel	16.43% 68	17.87% 74
▼ Boutique Hotel	21.82% 84	14.29% 55
▼ Airport Hotel	11.36% 35	26.62% 82
▼ Resort	18.54% 79	17.84% 76
▼ Golf Resort	13.95% 42	20.27% 61
▼ Conference Center	11.03% 43	25.38% 99
▼ Convention Center	9.97% 35	30.77% 108
▼ Sports Facility/Stadium/Arena	13.69% 23	35.12% 59
▼ Gaming Facility	5.80% 8	45.65% 63
▼ Cruise Ship	6.96% 8	67.83% 78



# Onsite Technology Tools Rise Relative to Interest in Virtual

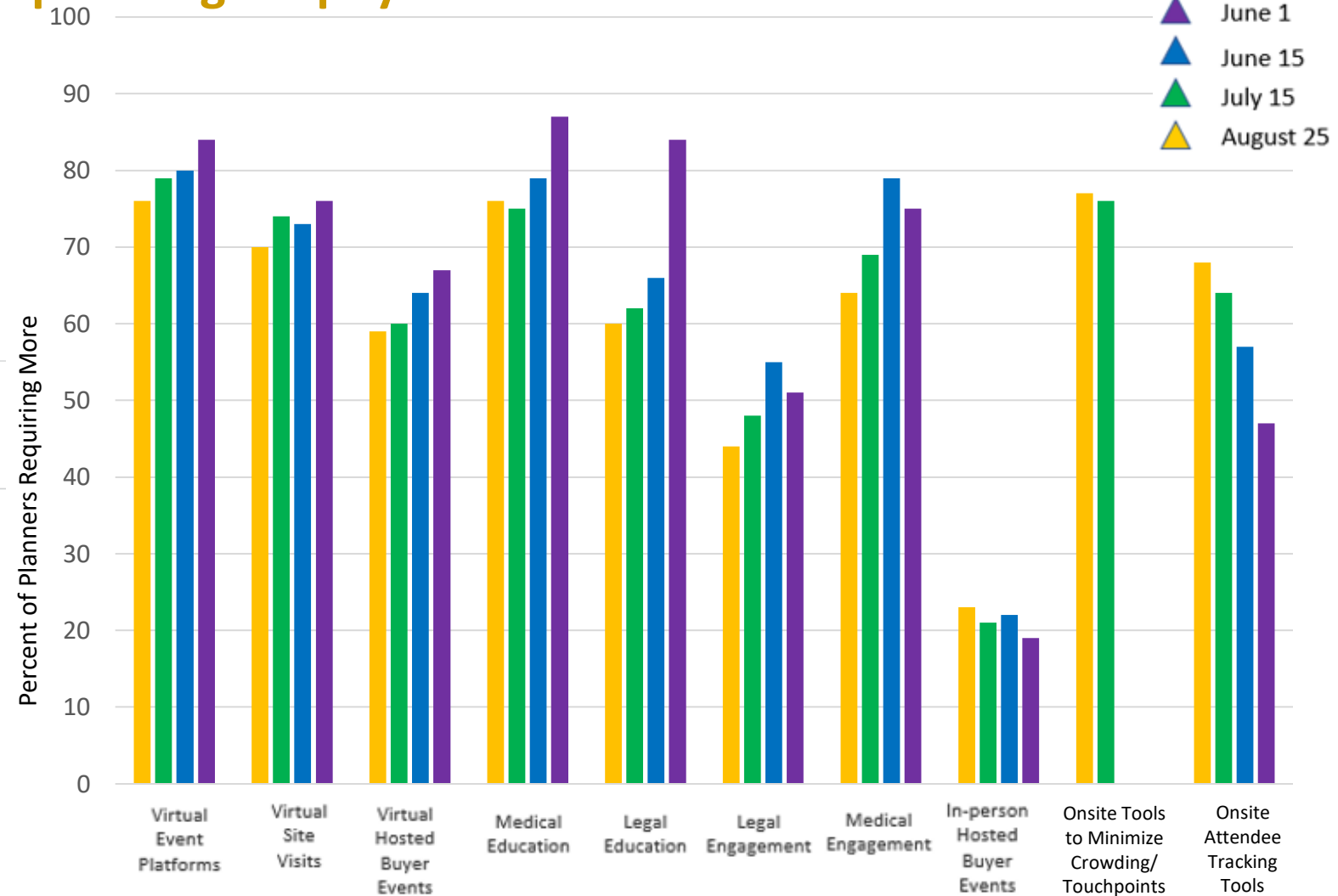
## An indicator of planning for physical events in '21 and '22?

 June 1  
 June 15  
 July 15  
 August 25

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

August 25 Responses

	MORE	FEWER		MORE	FEWER
Virtual event platforms	75.80% 404	12.01% 64	Virtual hosted-buyer events and fairs to support buying decisions	58.53% 223	18.90% 72
Virtual site visits	69.66% 349	13.77% 69	On-site registration tools to minimize crowding and touch points	76.85% 405	5.69% 30
Education specific to legal matters	60.29% 290	3.95% 19	On-site attendee-tracking tools	68.22% 307	6.67% 30
Education specific to health/medical safety matters	76.48% 387	3.75% 19			
Engagement of professional legal advisory services	44.42% 199	3.57% 16			
Engagement of health/medical safety advisory services	64.47% 294	5.26% 24			
In-person, hosted-buyer events and fairs to support buying decisions	23.31% 93	35.59% 142			

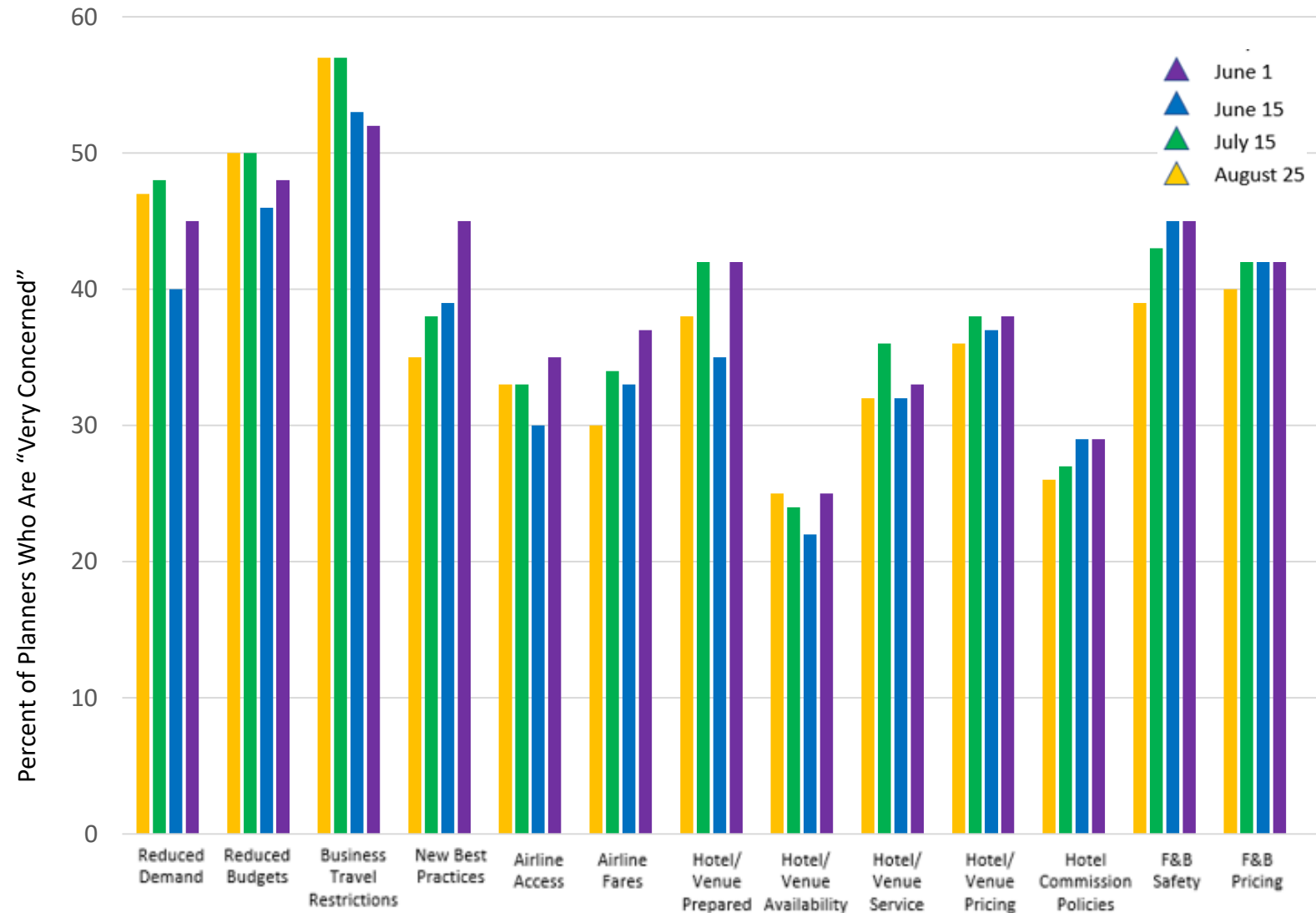


## “If You Build It, They May Not Come”: Travel Restrictions the Top Concern

How concerned are you about the following?

August 25 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	47.36% 269	Hotel and venue service levels	32.09% 181
Reduced meeting and event budgets	49.56% 282	Hotel and venue pricing and rates	36.38% 207
Travel policy updates restricting business travel	56.59% 322	Hotel commission policies	26.25% 126
New best practices for gatherings	35.10% 199	Food-and-beverage safety	39.34% 225
Airline accessibility	33.15% 179	Food-and-beverage pricing	40.60% 231
Airline fares	30.22% 162		
Hotel and venue health and safety preparedness	38.29% 219		
Hotel and venue availability	25.22% 143		



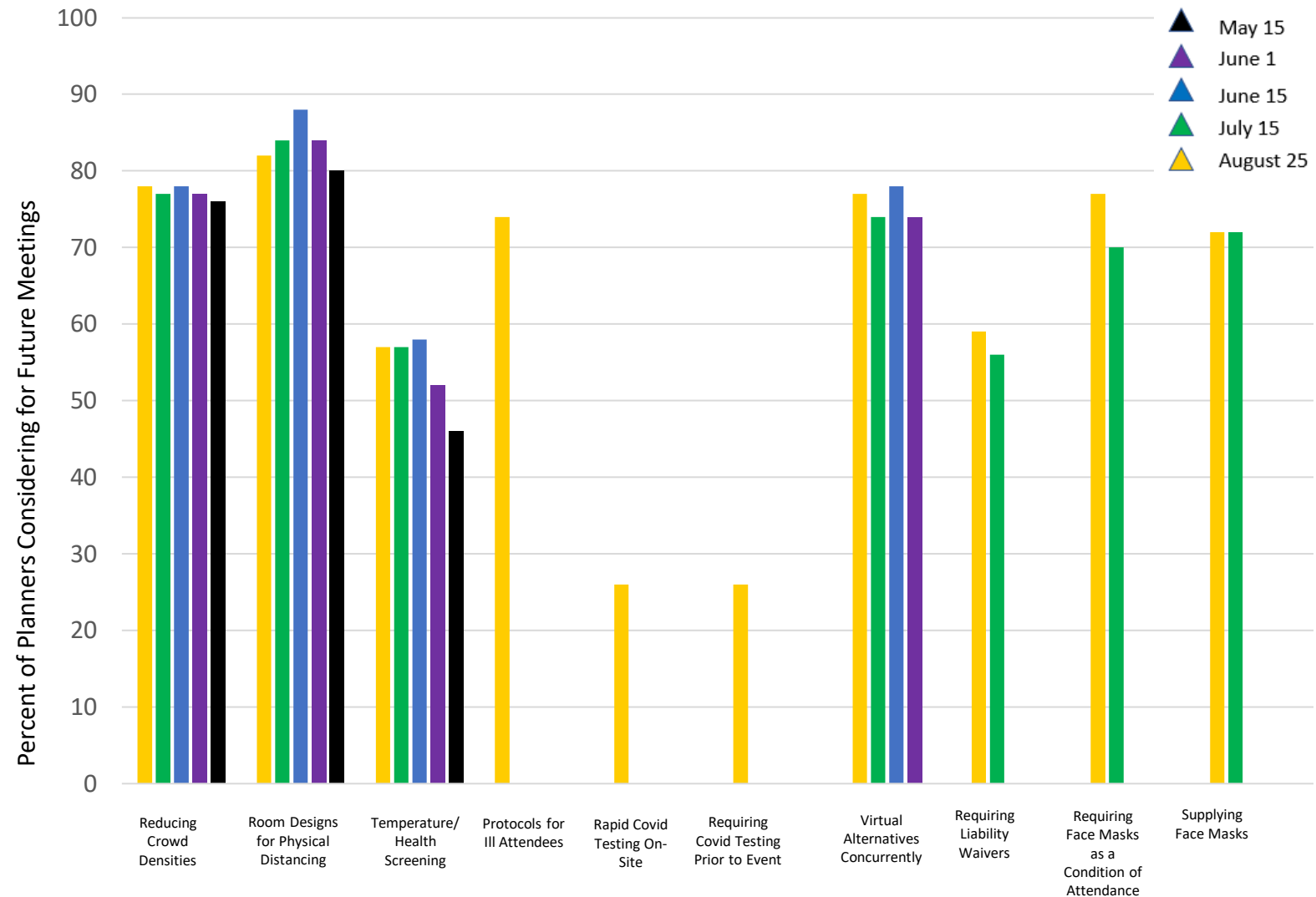


# “Yes” to Distancing, Protocols, Face Masks; “No” to Testing

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

August 25 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	78.28%
Developing meeting room designs to encourage physical distancing	82.24%
Establishing protocols for attendees who are ill	74.14%
Providing temperature checks	57.07%
Providing rapid Covid-19 testing	25.69%
Requiring Covid test prior to the meeting	26.38%
Providing virtual alternatives concurrently with physical events	76.55%
Requiring liability waivers as a condition of attendance	58.97%
Requiring face masks as a condition of attendance	77.07%
Supplying face masks for attendees	72.24%

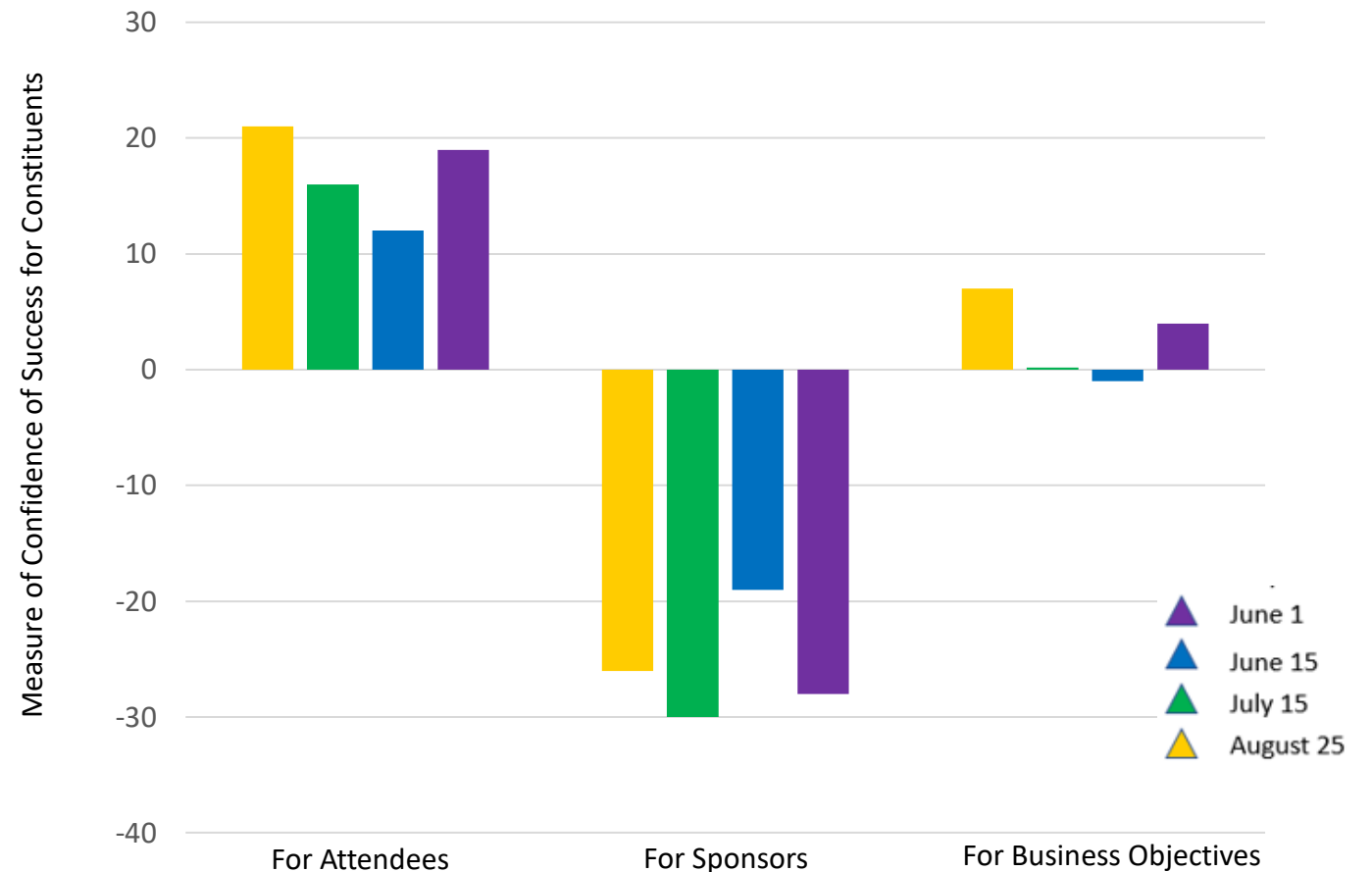


# As More is Learned About Virtual Events, More Planners Begin to Gain Confidence in Their Business Potential

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

August 25 Responses

	1-2	3	4-5
▼ For attendees	22.81% 130	32.98% 188	44.21% 252
▼ For sponsors	44.82% 251	35.71% 200	19.46% 109
▼ For business objectives	27.29% 155	38.91% 221	33.80% 192
▼ Not applicable	53.03% 70	30.30% 40	16.67% 22



## In Summary:

- ✓ Majority of planners focused on Q2 '21 for rescheduled and new events.
- ✓ Is planning for '21 providing "light at the end of the tunnel"?
- ✓ Fear of travel and gathering are the biggest near-term obstacles.
- ✓ Rebooking remain the primary focus.
- ✓ The glass is half full – most planners are modestly confident about the near-term future (1-5 years) for live events.
- ✓ Planners are satisfied with industry leadership in this time of crisis.
- ✓ Greatest demand seen for meetings of less than 100 attendees, at boutique hotels and resorts.
- ✓ Protocols expected, but not Covid testing.
- ✓ Travel restrictions top concern.
- ✓ Virtual now looking more promising, business-wise.

- "We have to get over the fear factor and get back to traveling and meeting again."
- "There is no longer a 'going back to normal'. I'd like to be part of shaping the new normal, but I don't know where to begin."
- "I just held my annual event with significant safety protocols in place. It worked."
- "This is an exciting time in our industry. We can finally showcase the strategy that should have existed all along. The folks who think of themselves as 'planners' might not have a future here. But the folks who think of themselves as strategic advisors and producers will thrive."
- "We just hosted an annual local meeting. We capped attendance to allow for 6 feet social distancing, temperature checks, waivers, masks. We received nothing but compliments and there have been no Covid cases reported."
- "We are hosting our first event since March this weekend and to be honest, I am more nervous than I ever have been for an event. We are prepared and trained, but still nervous for the unknown and anxious thinking about dealing with people who aren't willing to follow protocols to keep everyone safe."
- "I'm expecting virtual for larger events until at least mid 2021 - smaller boutique physical events up until then too."