



PULSE SURVEY

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

November 18, 2020



EXECUTIVE SUMMARY

Planners who intended to hold in-person or hybrid meetings in the near future have adjusted their expectations — again — as Covid-19 numbers continue to rise. Although hopeful for positive change under the Biden administration, fewer than half of the 850 respondents to Northstar's latest PULSE Survey anticipate holding meetings and events with an in-person audience before Q3 2021, slightly down from 55 percent a month ago. One in four won't hold meetings until Q4 2021 or later, up from 16 percent in October.

This latest version of the survey was conducted from Oct. 22 through Nov. 18. Northstar established the PULSE Survey in March 2020 to gauge and track the industry's response to the pandemic.

Following are the latest takeaways.

Rebooking Is Still Job #1

Rescheduling or rebooking events is still the primary job responsibility of 37 percent of respondents, up slightly over the past two months. A consistent 32 percent are “not currently focused on live events.” Just 7 percent say booking new events is now their priority.

Many Are Hopeful for Change with the New Administration

The Biden administration will enact measures to address the pandemic and bring positive changes to the meetings and hospitality industry, 41 percent of respondents believe. Another 36 percent aren't sure what to expect, but they're hopeful.

Noted one respondent: “It doesn't matter who is in office; a pandemic is a pandemic.” Said another, “The election itself will not bring positive changes. It is our own mission to do that.”

Most Believe We Should Be Meeting

Whether or not our industry associations should be holding meetings — and demonstrating best practices to educate buyers and suppliers — is the subject of hot debate. Two-thirds of planners say we should be meeting, with 15 percent responding “absolutely; we need to get back to business,” and nearly half (48 percent) saying “yes, if proper protocols are followed and enforced.”

Among the 30 percent who believe in-person meetings are irresponsible, many added comments. Among them: “Arguing that we need to ‘get back to business’ is gross when juxtaposed as a binary decision between making money and public safety” and “I know this will be perceived as heresy, but I think it’s inappropriate to consider any sort of in-person meetings until the Covid-19 vaccine is widely available and people are getting it.”

Planners Themselves Will Stay Home

Even as a majority believe the meetings industry should go ahead with in-person events, 71 percent don’t plan to attend any meetings or business events this year.

“I want to see science on the protocols limiting spread of the virus first,” said one planner. Another noted, “I’m concerned with people not following the rules, not wearing masks and spreading this unnecessarily.”

More Are Holding Virtual Meetings

Virtual events are increasingly common, with only 17 percent of respondents not involved in planning online meetings. In fact, 33 percent report that more than half of their events are now digital only, with another 26 percent planning online meetings exclusively.

However, their confidence in the effectiveness of virtual events has steadily declined month-over-month. On a five-point scale (1 = not at all confident; 5 = highly confident), planners rate online meetings a 2.98, slightly down from 3.13 in October.

Fear Is Among the Biggest Obstacles

Concerns about future events are many and varied. Planners' most prevalent worries are fear of contagion, restrictive budgets, limited or costly airline service, hotel availability and staffing, and fear of travel.

"I think the word 'fear' is being thrown around too much," noted one respondent. "I wish people would use the word 'safe.' I'm not fearful, but I want to be safe."

Among the hundreds of verbatim comments, many respondents acknowledged that significant changes are necessary for our business to move forward. "It's time for a rebirth," said one respondent. "What can we learn from this? What have we been distracted from that we can examine now to re-create the meeting experience?"

PULSE SURVEY

**NEW
DATA**

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

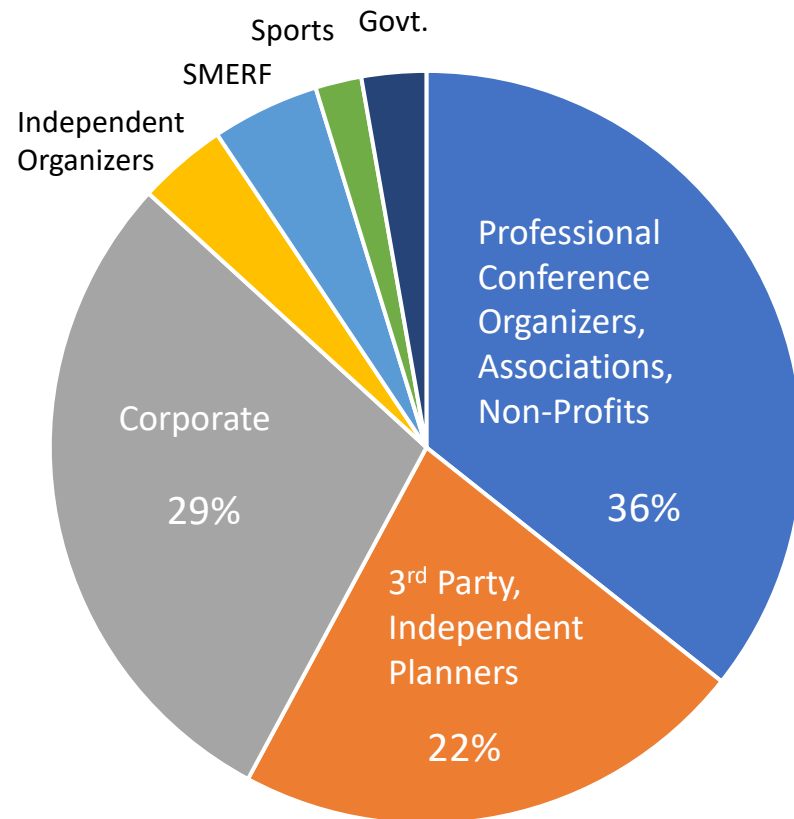
NOVEMBER 19, 2020



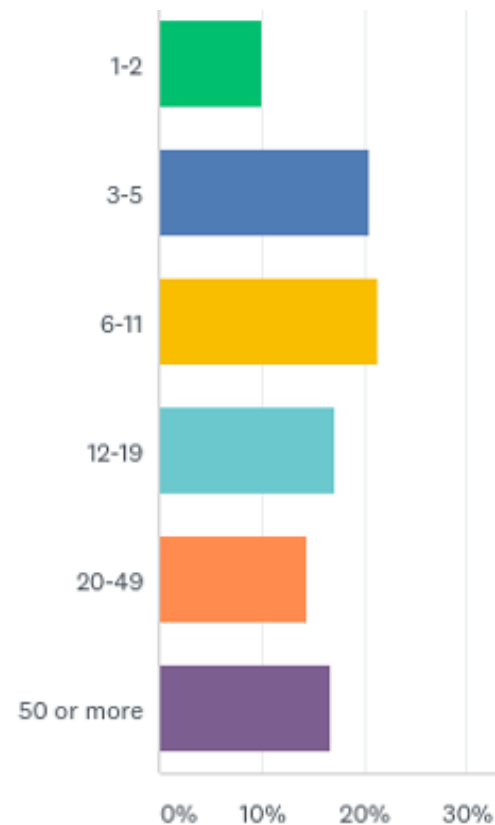
NORTHSTAR
MEETINGS GROUP

Respondents By Type, Volume and Size

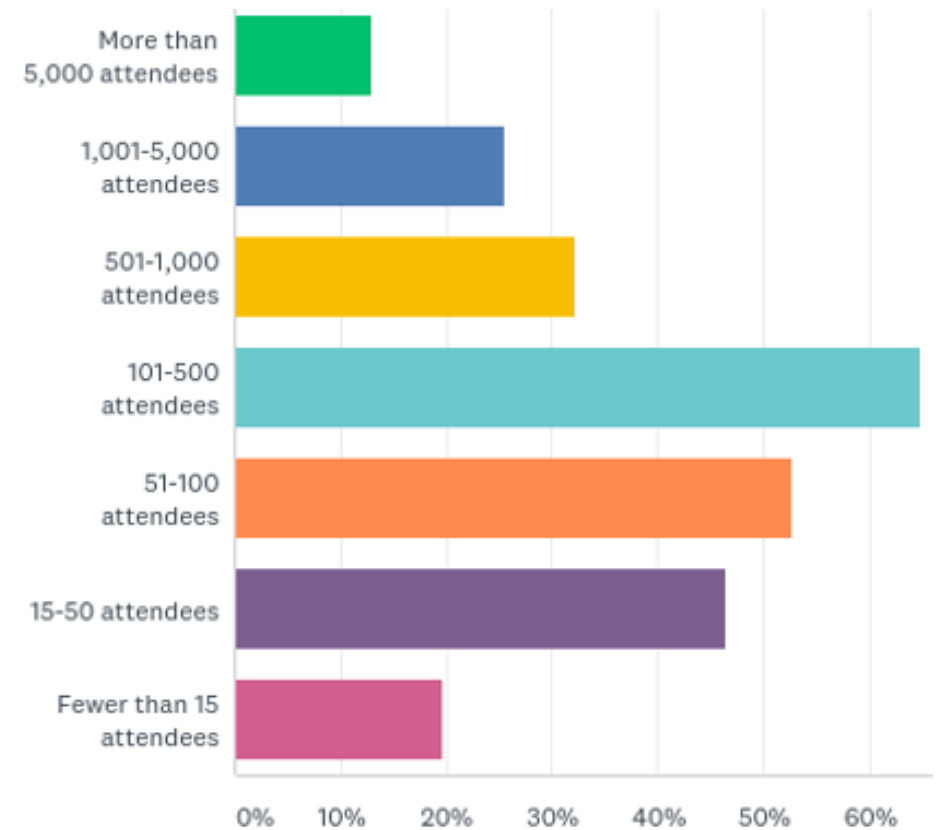
850 Valid Planner Responses



Type



of Meetings



Size of Meeting

“Steady” or “Stuck”?

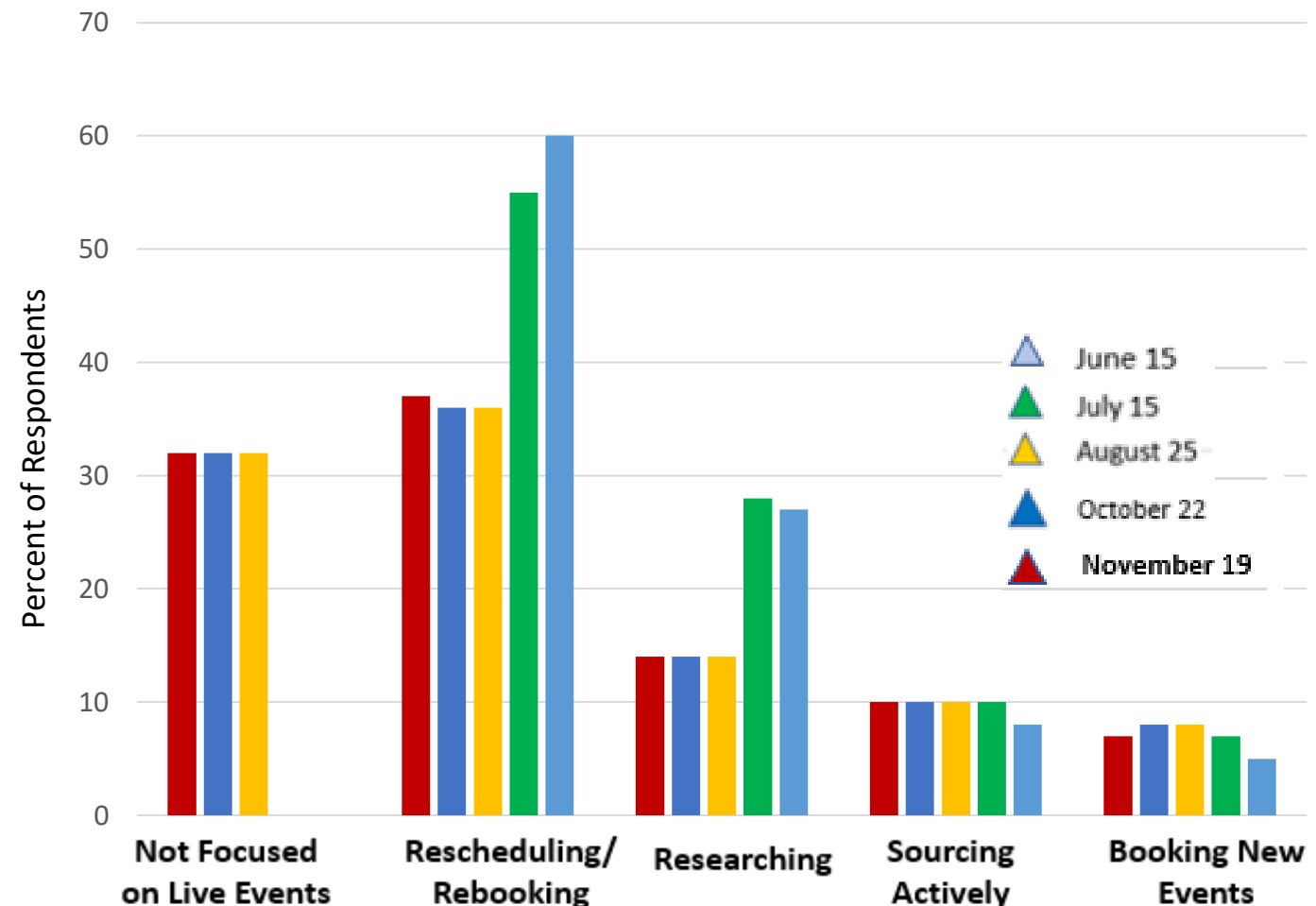
Sourcing remains at low levels as planners continue to focus on rebooking

Nearly two-thirds report they are not focused on live events

What is your current primary focus as it pertains to your live, in-person events?

Responses as of November 19, 2020

ANSWER CHOICES	RESPONSES
▼ I am rescheduling or rebooking events.	36.52%
▼ I am researching potential new events, but not ready to issue an RFP or lead.	13.81%
▼ I am actively sourcing (issuing RFPs or leads) for new events.	10.23%
▼ I am booking new events.	7.30%
▼ I am not currently focused on live, in-person events.	32.14%



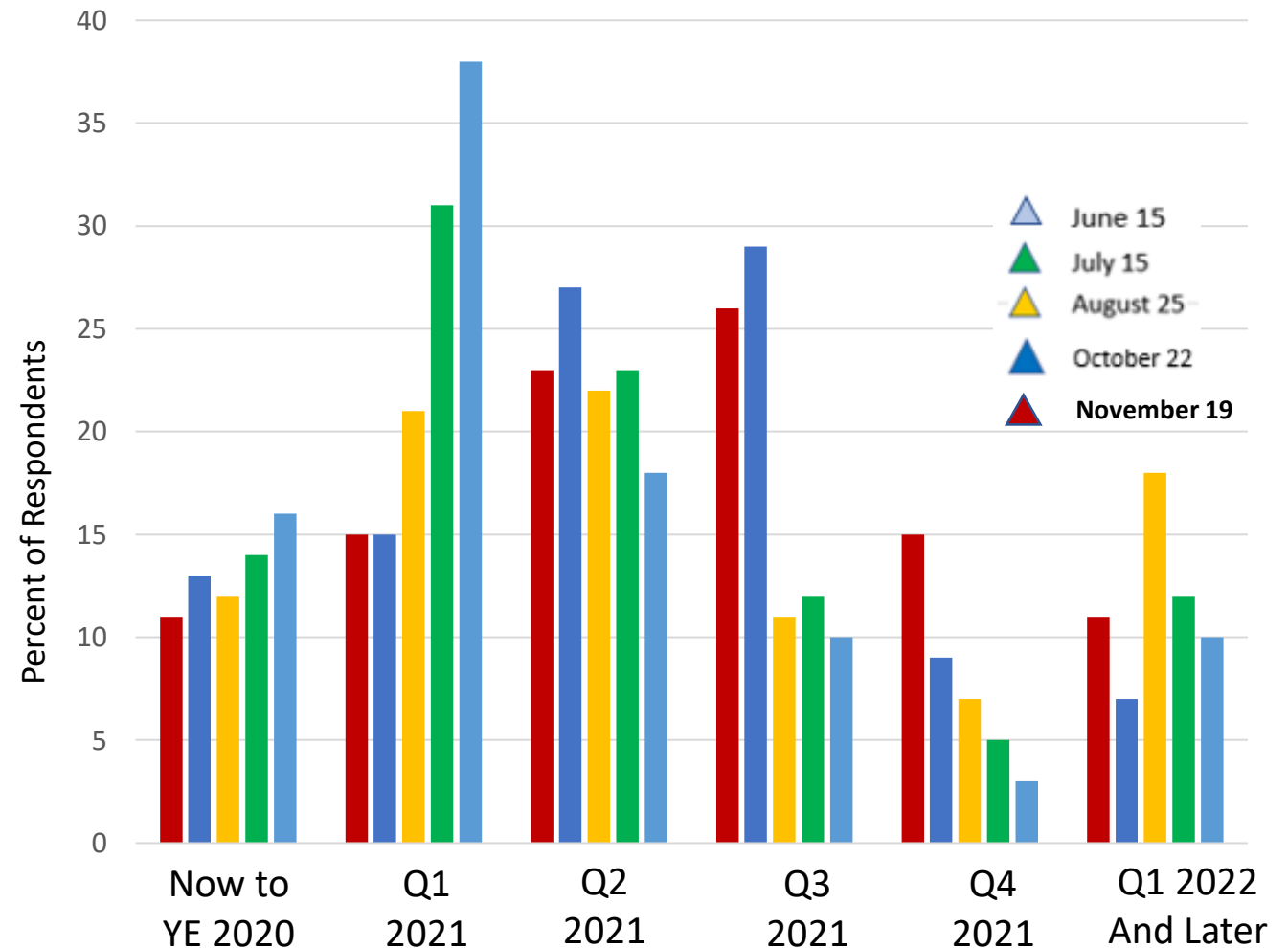
When's Your Next Live Event?

'Q3 '21 still most likely, but a notable confidence shift to Q4 '21 and '22

When at the earliest do you expect to hold your next in-person or hybrid meeting or event?

Responses as of November 19, 2020

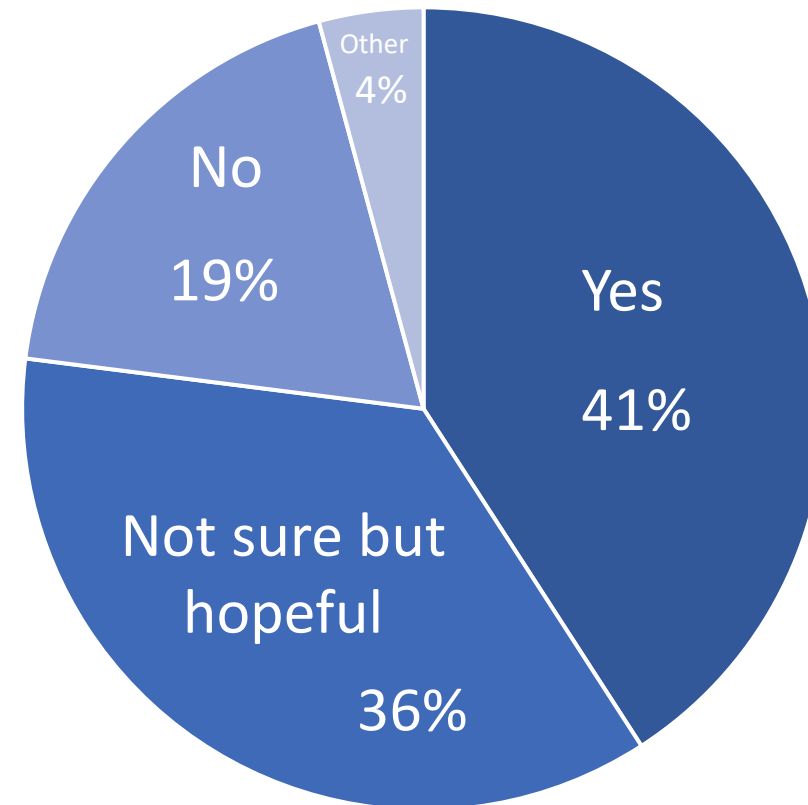
ANSWER CHOICES	RESPONSES
Before year-end 2020	10.77%
Q1 2021	14.80%
Q2 2021	23.28%
Q3 2021	25.71%
Q4 2021	14.67%
2022 or later	10.77%



Planners are hopeful the US election will yield positive change



Do you think the outcome of the US election will result in measures to address the pandemic and bring positive changes to the hospitality/meetings industry?



Few Planners Will Attend In-Person Gatherings Over the Next 3 Months

Do you plan to attend any in-person meetings or business events over the next three months?

As of November 19, 2020

71% Say “No”



As of October 22, 2020

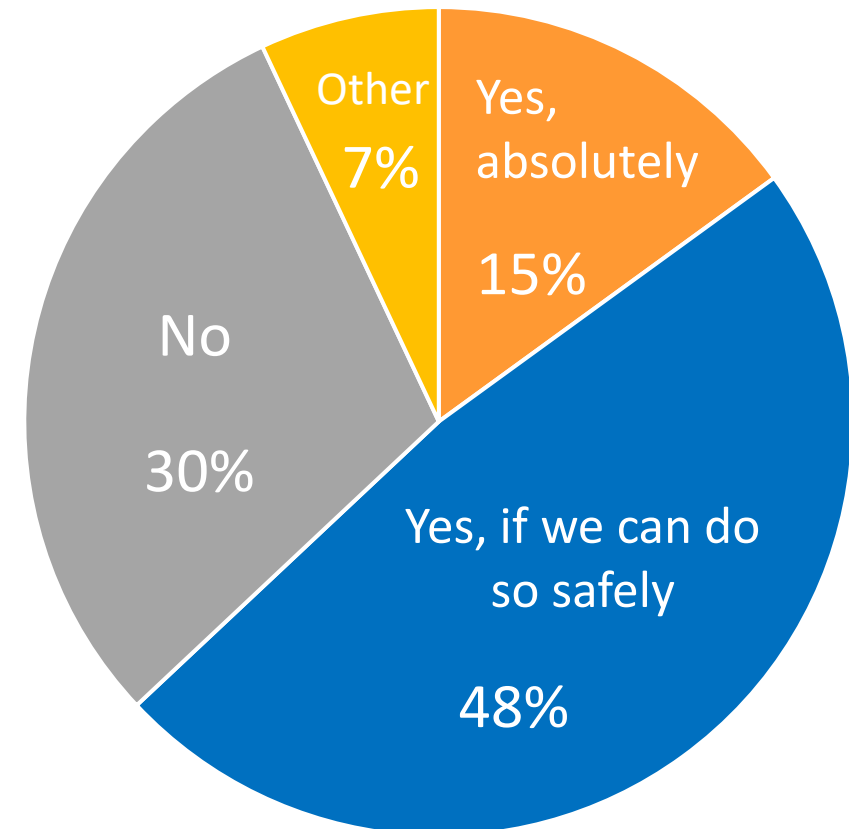
In response to the same question last month, 72% said “No”

Although They Say If We Can Meet, We Should



Absolutely; we need to get back to business	14.48%
Yes, if all restrictions and protocols are followed and enforced	48.39%
No	29.76%
Other (please specify)	7.37%

Should meetings industry organizations or related businesses be holding in-person meetings?



Although They Say If We Can Meet, We Should

Sample “Other” Verbatim Comments:



“It depends on the purpose of the meeting, the number of attendees, the comfort level of those attendees, and their agreeing to comply with all health and safety protocols.”

Should meetings industry organizations or related businesses be holding in-person meetings?

“I think if a group wants to meet and the venue wants to host them, then they should be able to meet. However, I am tired of being told ‘it is safe to meet’. That is an opinion and not a fact.”

“Leaving everything up to the states has caused more challenges than the actual pandemic.”

“The restrictions are complicated; the effects unknown.”

“It completely depends on where the event/meeting is located, what the Covid-19 situation is like in that area, the size of the event/meeting, and the likelihood of being able to implement and enforce the new best practices for Covid-19 prevention and control.”

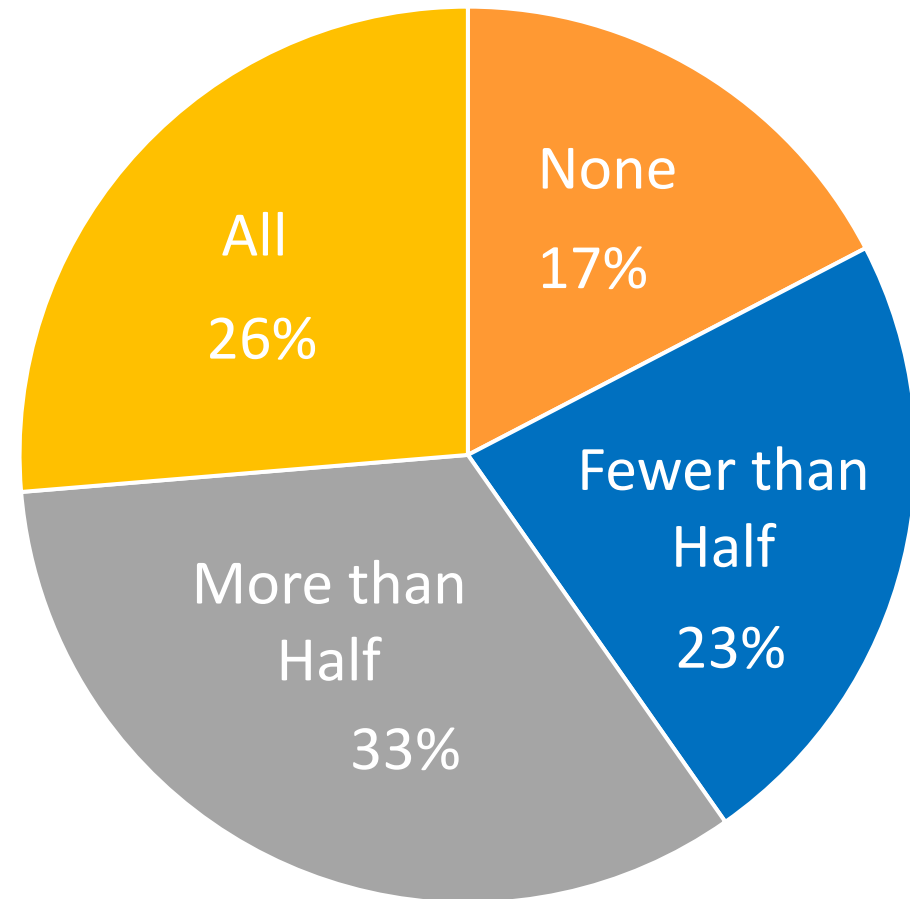
“We need to learn from event managers who are not suppliers to the meetings industry, to get a more balanced perspective of what is really going and ‘how to’.”

“Not until there is a coordinated effort across the U.S. to have clear, consistent, and enforced guidelines to protect society in general and establish confidence in efforts to control the spread of Covid-19.”

What percentage of the events you are now planning will be online only?



Since the onset of the pandemic, more and more planners report they are now planning online events.



Virtual Event Confidence Index Declines

Since October, planners' expectations for the success of their virtual events falls another 5%, reflecting steady, month over month declines since the pivot to virtual months ago.

As of November 19, 2020

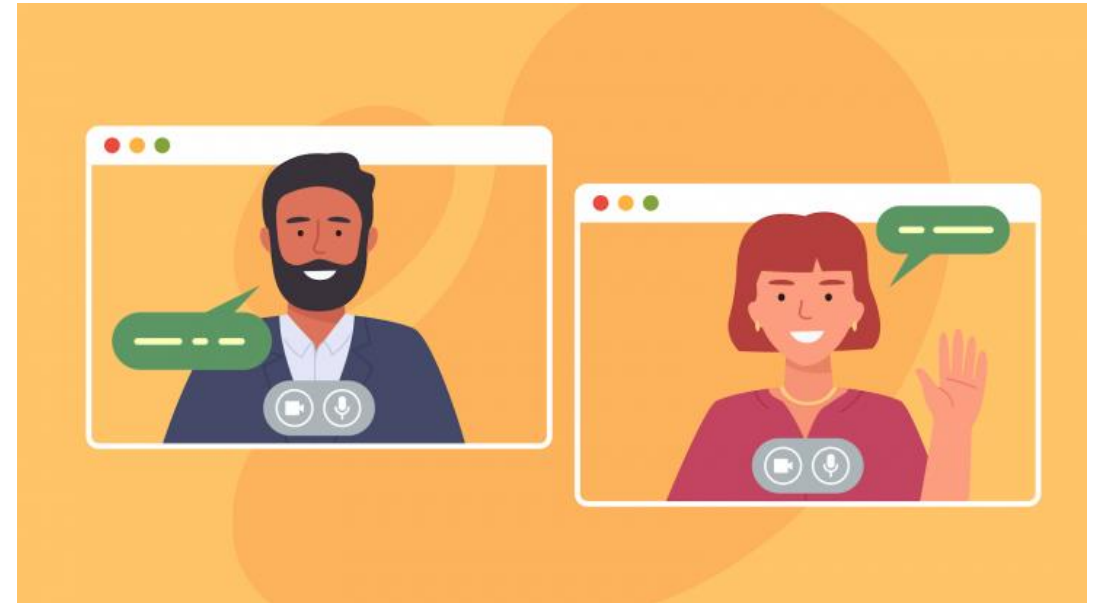
How successful will virtual events be for your constituents? (with 1 = not at all confident; 5 = highly confident)

2.98 Out of 5

“There are so many types of platforms, it’s difficult to determine which will be the right fit.”

“The silver lining in all of this is virtual meetings will help us reach a much wider audience . . .”

“The tools we’ve seen don’t bridge the gap on in-person networking in a virtual setting . . .”



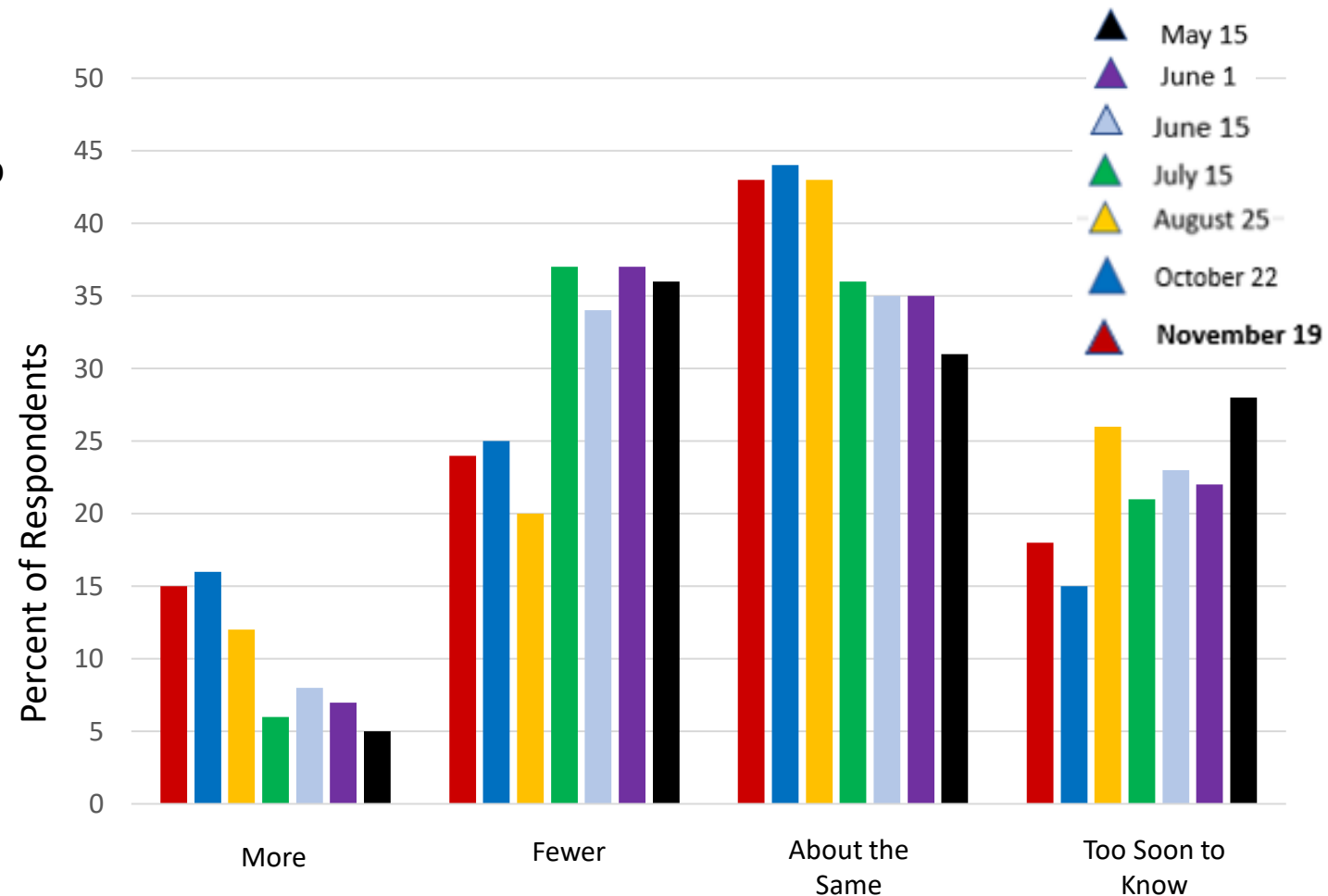
Most Planners Expect the Same Number of Meetings

But uncertainty, reflected by “too soon to know” sentiment, tweaks up again

When in-person gatherings are no longer restricted, do you expect more or fewer in-person or hybrid meetings than before Covid-19?

November 19 Responses

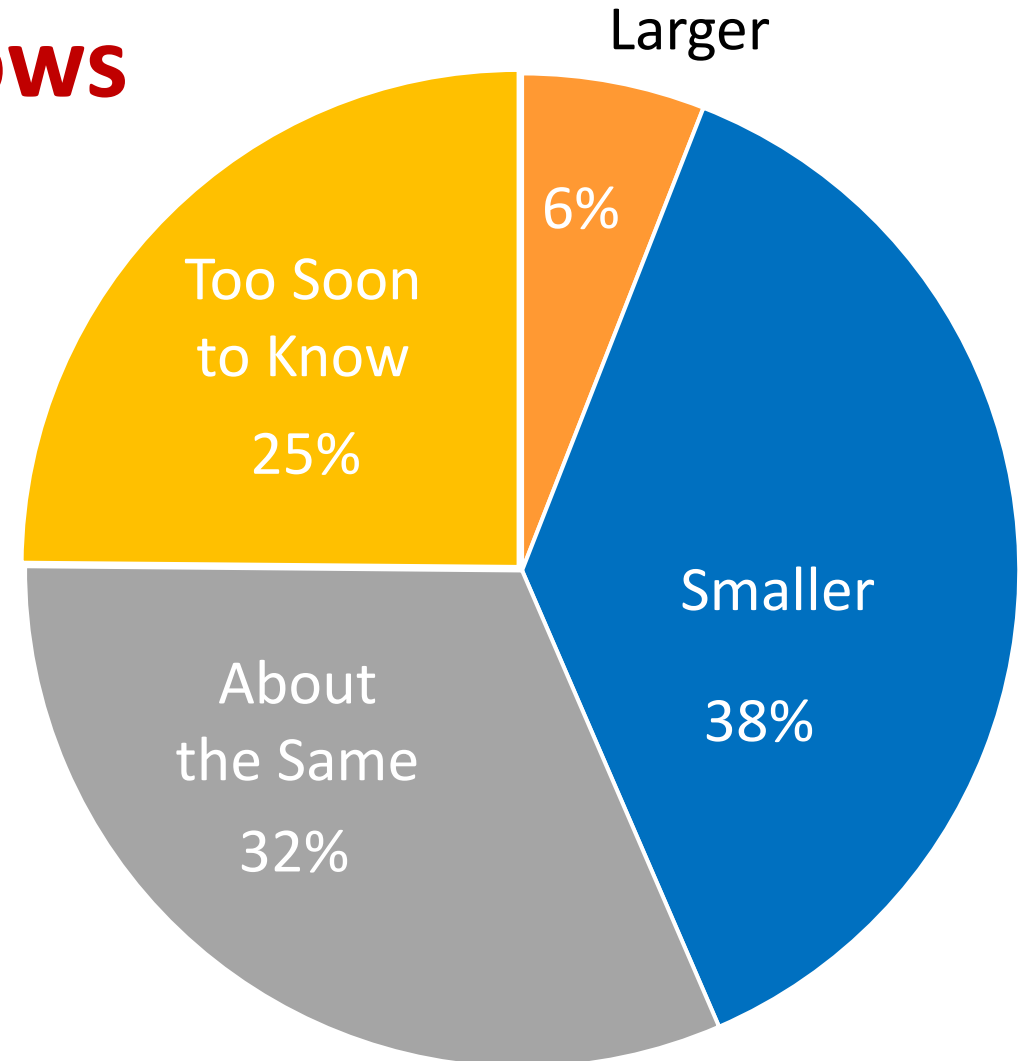
▼ More	14.94%
▼ Fewer	24.36%
▼ About the same	42.80%
▼ It's too soon to know.	17.90%



Trend to Smaller Events Grows

Since last month, 7% more planners think their live audiences will be smaller

When in-person gatherings are no longer restricted, will the size of your live audiences be larger or smaller than before Covid-19?

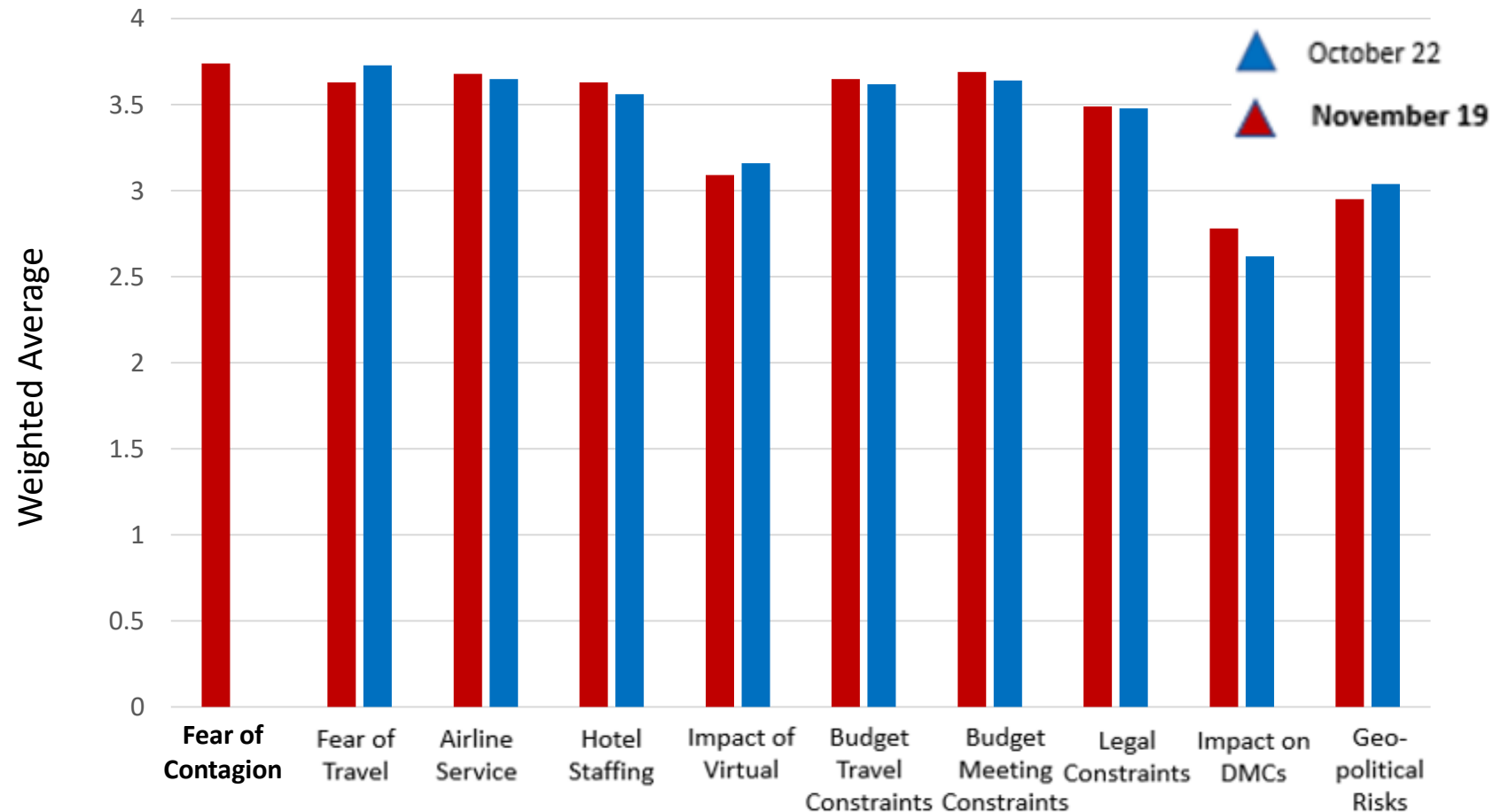


Budgets, Airlines, and Hotels Join Contagion As Top Concerns

For your future in-person or hybrid events, how concerned are you about the following? Rate each on a scale of 1 to 5 (with 1 being “not at all concerned” and 5 being “extremely concerned”)

November 19 Responses

Continued fear of travel extending over long-term	Constraints on business travel budgets
Continued fear of contagion from Covid-19	Constraints on meetings budgets
Impact of crisis on airline service, routes, pricing, etc.	Inflexible legal/financial contractual terms
Hotel staffing reductions/hotel closures	Loss of destination marketing companies to support programs
Impact of virtual events on demand for physical events	Risks associated with geopolitics, civil unrest, crime, immigration, trade, etc.



In Summary:

- ✓ Planners are hopeful the outcome of the US election will yield positive change for the travel and meetings industries.
- ✓ Planners' primary focus remains rescheduling events (36%), right where it was last month, with those reporting they are booking events are down slightly.
- ✓ Over 60% of meeting planners support the purpose of industry meetings, if for no other reason than to show that "safe meetings" is are possible.
- ✓ Confidence in the success of virtual events continues to wane.
- ✓ The majority think Q3 '21 is when their events will be back in business, but many have changed their minds and moved instead to Q4 '21 and '22 over the past month.

Selected Verbatim Comments:

- "Why is our industry incapable of getting support for us, when we contribute so much?"
- "I know this will be perceived as heresy, but I think it's inappropriate to consider any sorts of in-person meetings until the Covid-19 vaccine is widely available, and people are actually getting it."
- "I think the word "fear" is being thrown around too much. I wish people would use the word "safe." I am not fearful, but I want to be safe."
- "Whatever the "new normal" will be, it'll be a learning curve for every facet of the meetings industry and all of us who participate in it to whatever degree."
- "I've managed six in person events ranging in attendance from 50 to 300. No negative results. All parties involved were willing to follow CDC guidelines and benefited from attending the events."
- "It's time for a rebirth. What can we learn from this? What have we been distracted from that we can examine now, to recreate the meeting experience?"
- "In-person meetings are the livelihood for many -- from hotel workers, to convention center staff, but that's not the purpose of the meetings. The purpose of meetings is to accomplish business objectives. The case for the future of meetings has to be made for their purpose, not for the jobs that are impacted by them."