

PULSE SURVEY

**NEW
DATA**

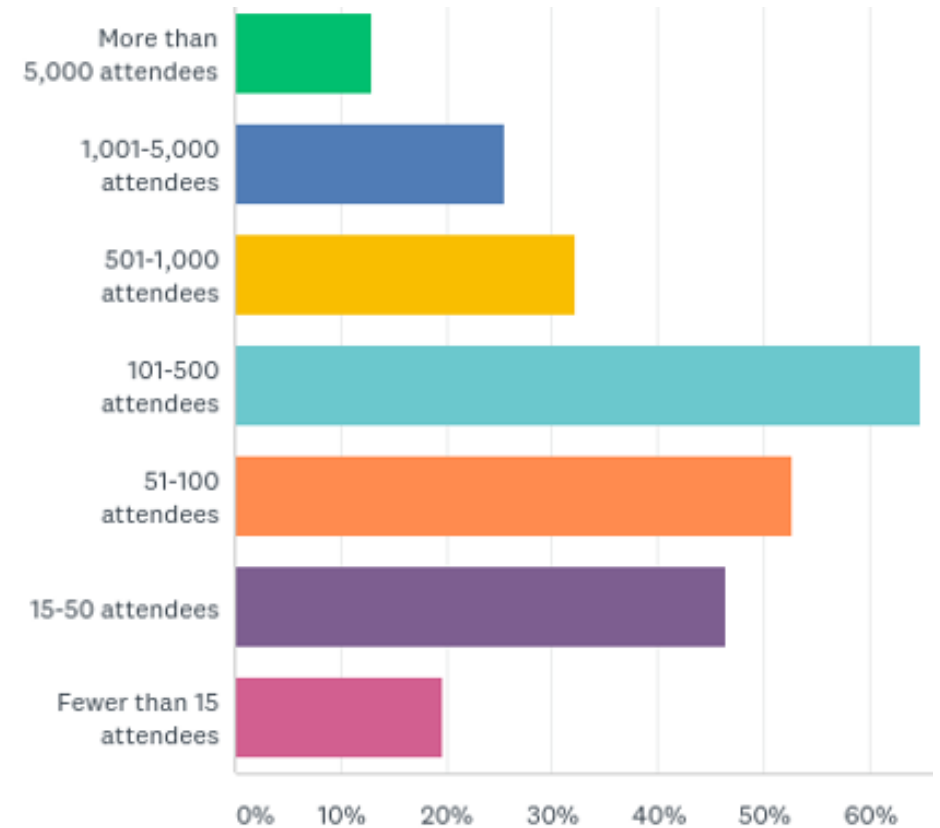
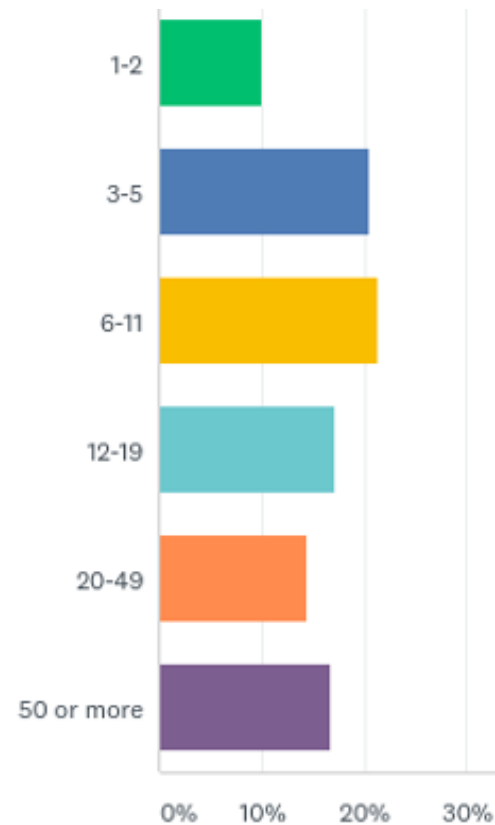
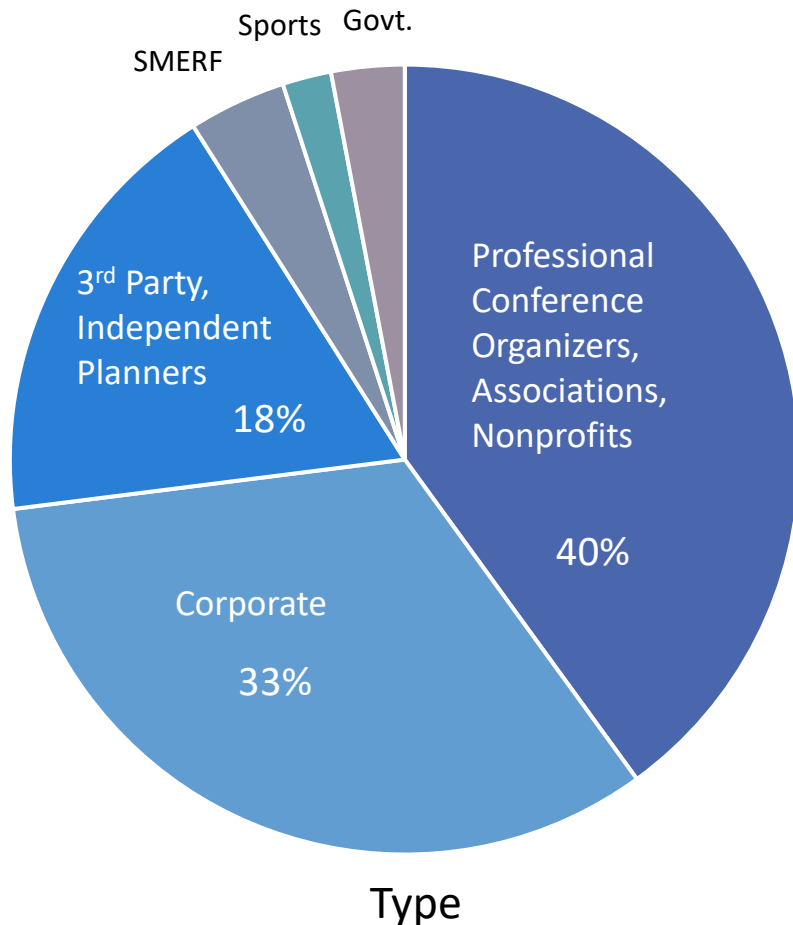
MEETINGS AND EVENTS IN THE ERA OF COVID-19

OCTOBER 7, 2021



Respondents by Type, Meetings Volume and Size

550 Valid Planner Responses



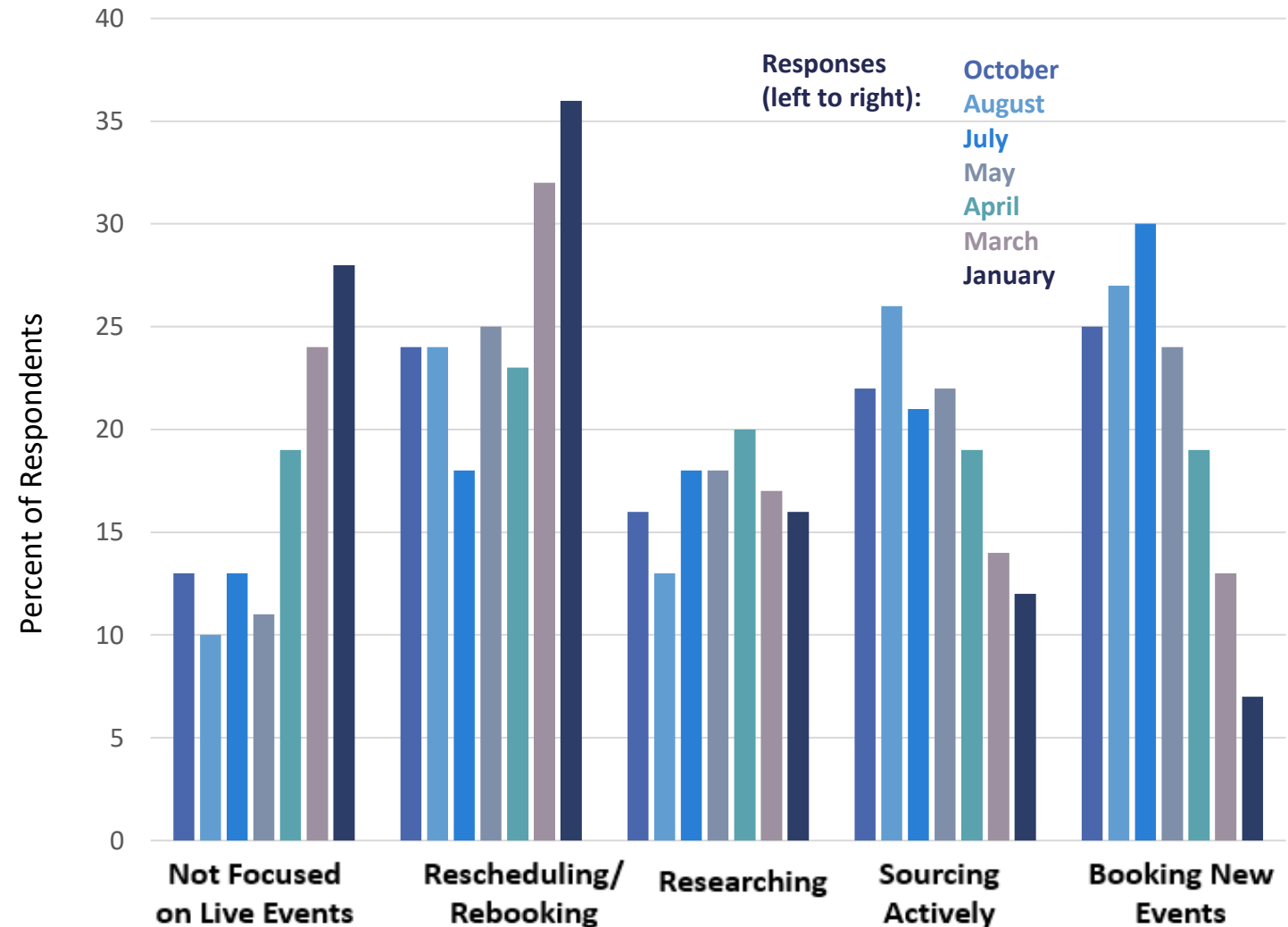
New Booking Activity Continues Decline

The spread between new booking activity and rescheduling/rebooking tightens, with fewer planners sourcing actively.

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

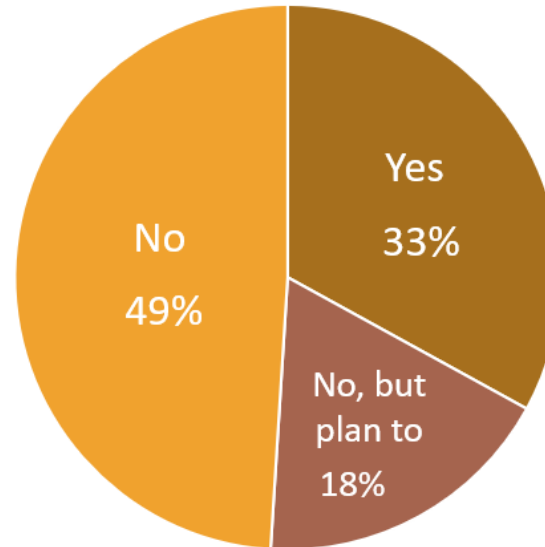
Responses as of October 6, 2021

ANSWER CHOICES	RESPONSES
▼ I am rescheduling or rebooking events	24.17%
▼ I am researching potential new events, but not ready to issue an RFP or lead	16.18%
▼ I am actively sourcing (issuing RFPs or leads) for new events	21.64%
▼ I am booking new events	25.15%
▼ I am not currently focused on in-person events	12.87%



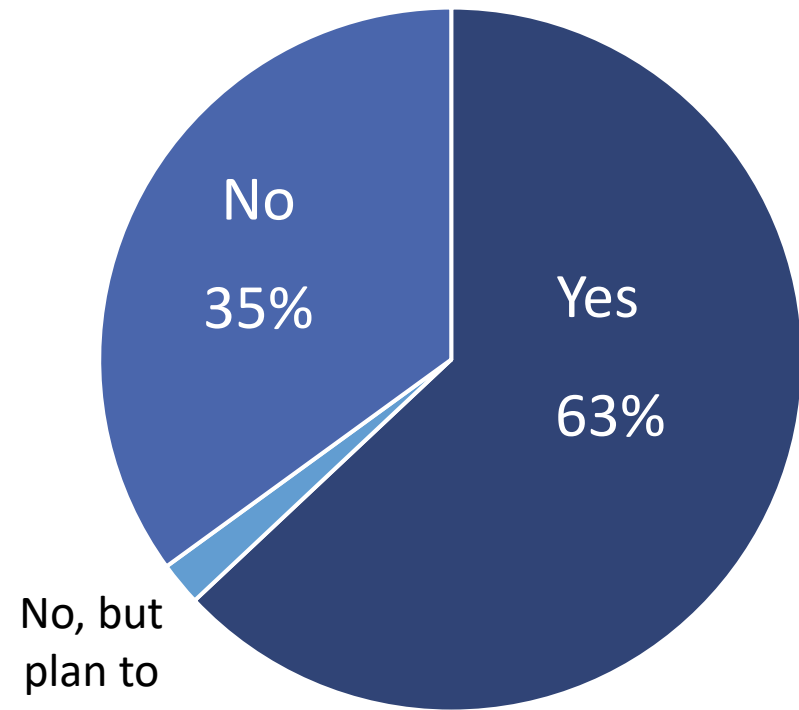
Is the Wave of Cancellations and Rescheduled Events Behind Us?

Many who hadn't planned on changing their meetings previously ended up doing so. Nearly two-thirds have taken some action. Is more to come?



August 19, 2021

Over the past two months, have you delayed, rescheduled, moved or cancelled an in-person meeting or event?



No, but
plan to
2%

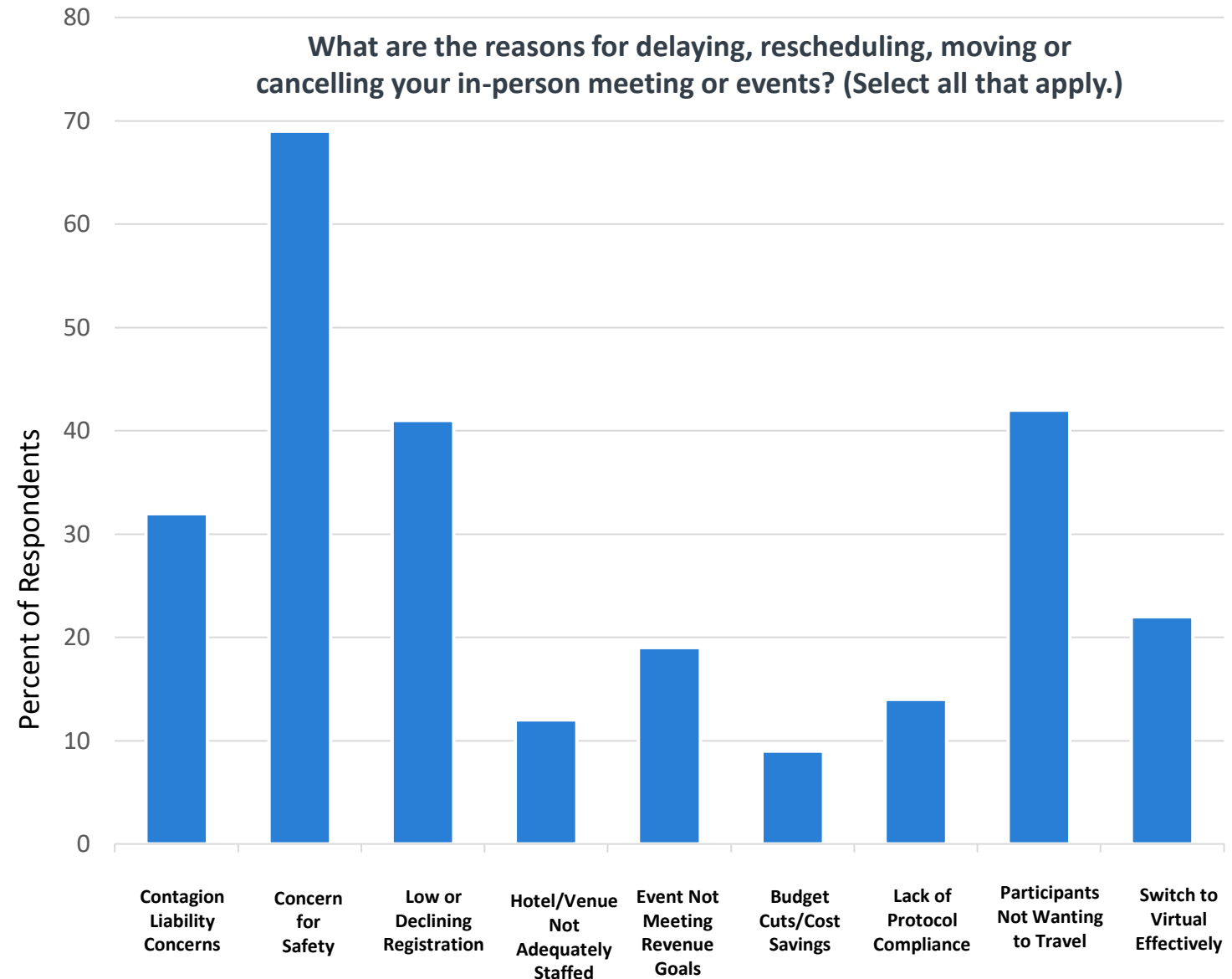
October 6, 2021

What Prompted the Change in Plans?

Concern for safety was the most common response, but reduced demand for registration – and participants not wanting to travel – were driving factors too.

ANSWER CHOICES	RESPONSES
▼ Concern for liability in the event of contagion	31.91%
▼ Concern for the safety of participants and staff	69.30%
▼ Low or declining registration/participant numbers	41.03%
▼ Hotel/venue not adequately staffed for groups	11.55%
▼ Event would not have met revenue goals	19.45%
▼ Budget cuts/cost-savings opportunity	8.51%
▼ Participants did not want to comply with health and safety protocols	13.68%
▼ Participants did not want to travel	41.95%
▼ Ability to switch to all digital/virtual effectively	21.58%

October 6, 2021

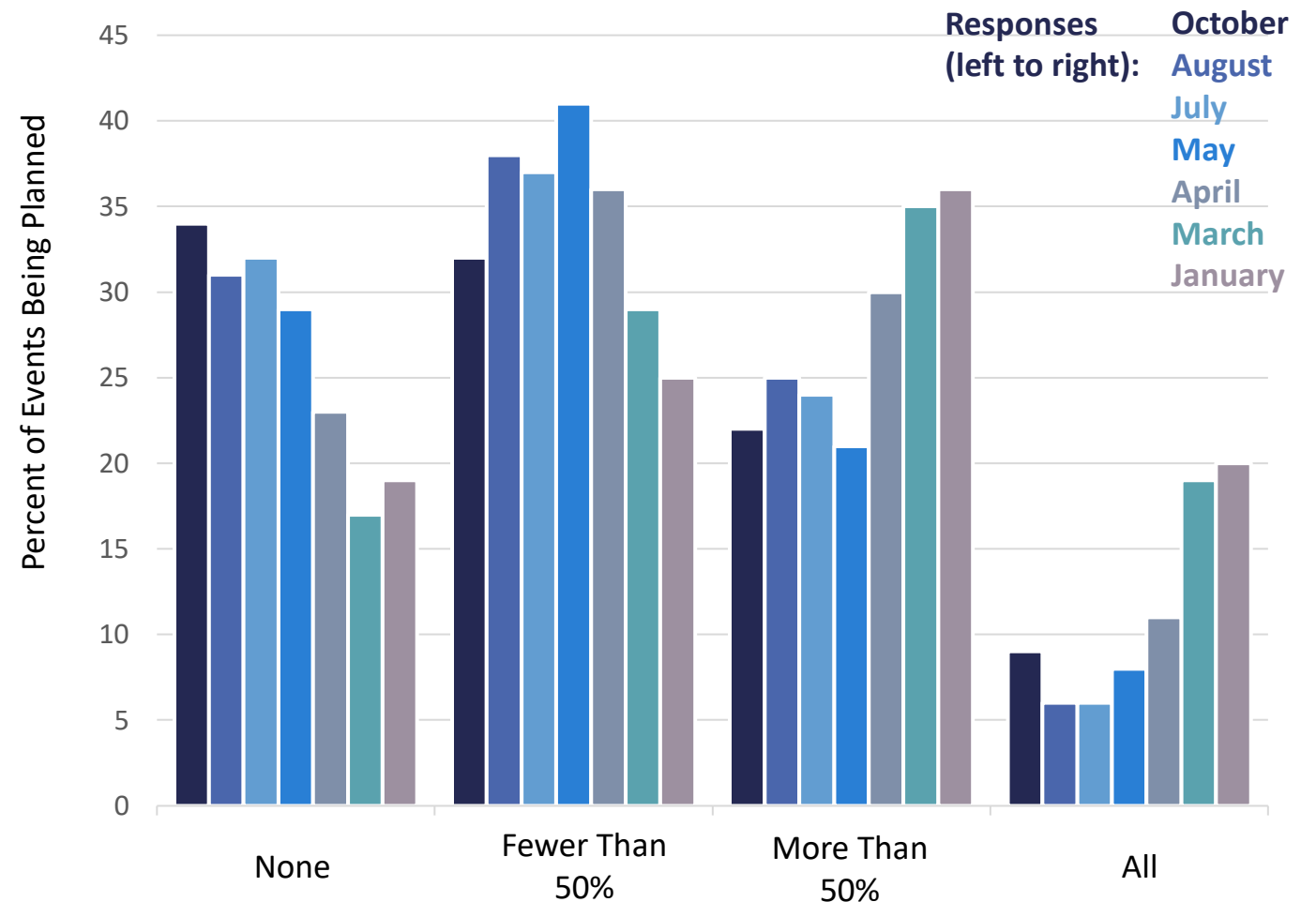


What percentage of the events you are now planning will be online only?



October 6, 2021

Planners are still mixed about online-only events, but more now say “none” versus “some.”

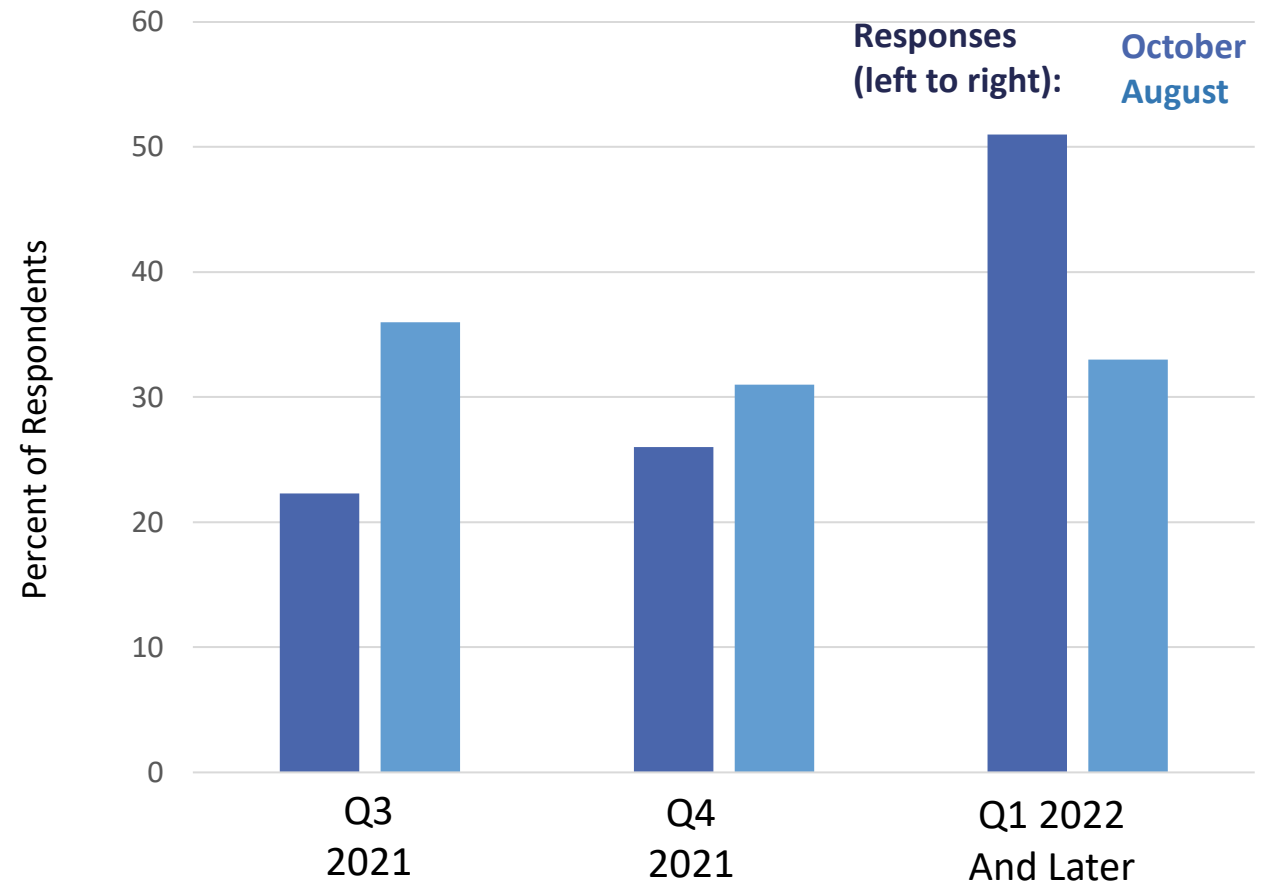


When's Your Next Live Event?

Hopes for 2021 Fade as Most Planners Look to 2022 for their Next Event

Fewer than 50% expect their next live event during the back half of 2021, down from 66% six weeks ago.

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



Responses as of August 19, 2021

ANSWER CHOICES	RESPONSES
Q3 2021	36.15%
Q4 2021	31.16%
First half 2022	23.68%
Second half 2022	7.48%
2023 or later	1.52%

Responses as of October 6, 2021

ANSWER CHOICES	RESPONSES
Q3 2021	22.38%
Q4 2021	26.36%
First half 2022	35.36%
Second half 2022	14.64%
2023 or later	1.26%

October 6, 2021

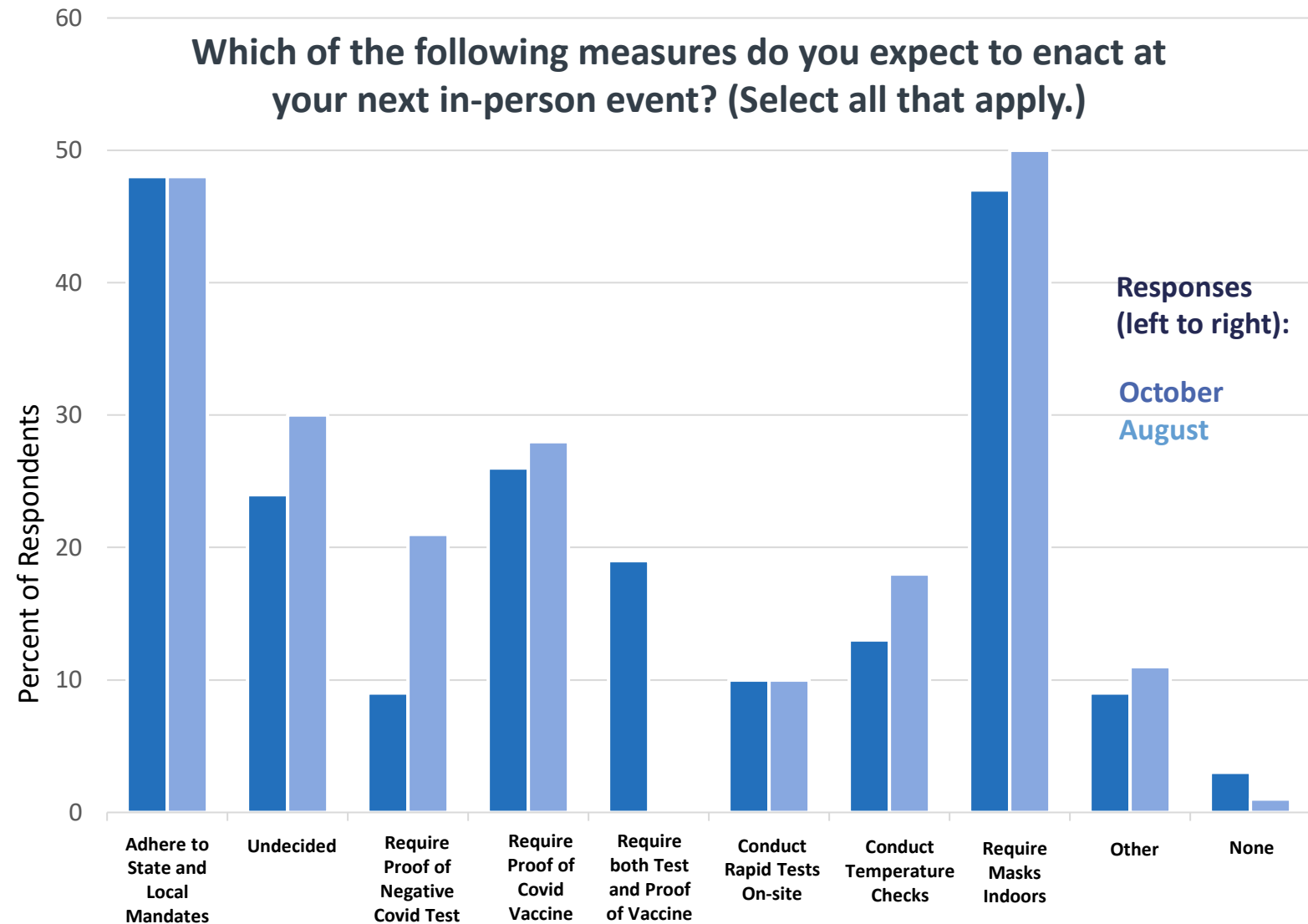
Intent to Enact Protocols Wanes

Fewer than 50% of planners report they will require masks for their next events, down from 62% in May.

ANSWER CHOICES

None of the above	2.71%
Require proof of recent negative Covid test only	8.96%
Require proof of Covid-19 vaccination only	25.62%
Require both vaccination and negative test	19.17%
Conduct rapid tests on-site	10.21%
Conduct daily temperature checks	13.33%
Require masks indoors	47.50%
Require masks indoors and outdoors	4.17%
Adhere to state and local mandates only	48.13%
Undecided/to be determined	23.96%

RESPONSES



October 6, 2021

What's Vexing Planners?

Space is less difficult to find, but contract terms, staffing are complicating factors.

If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)

ANSWER CHOICES

None of the above

It's hard to find the space and dates I want

Many of my supplier contacts are gone

Rates are higher than expected

Contract terms are not as flexible as needed

Hotels/venues lack adequate staffing

Venues I would like to use are closed

Not currently negotiating

RESPONSES

6.68%

23.80%

41.96%

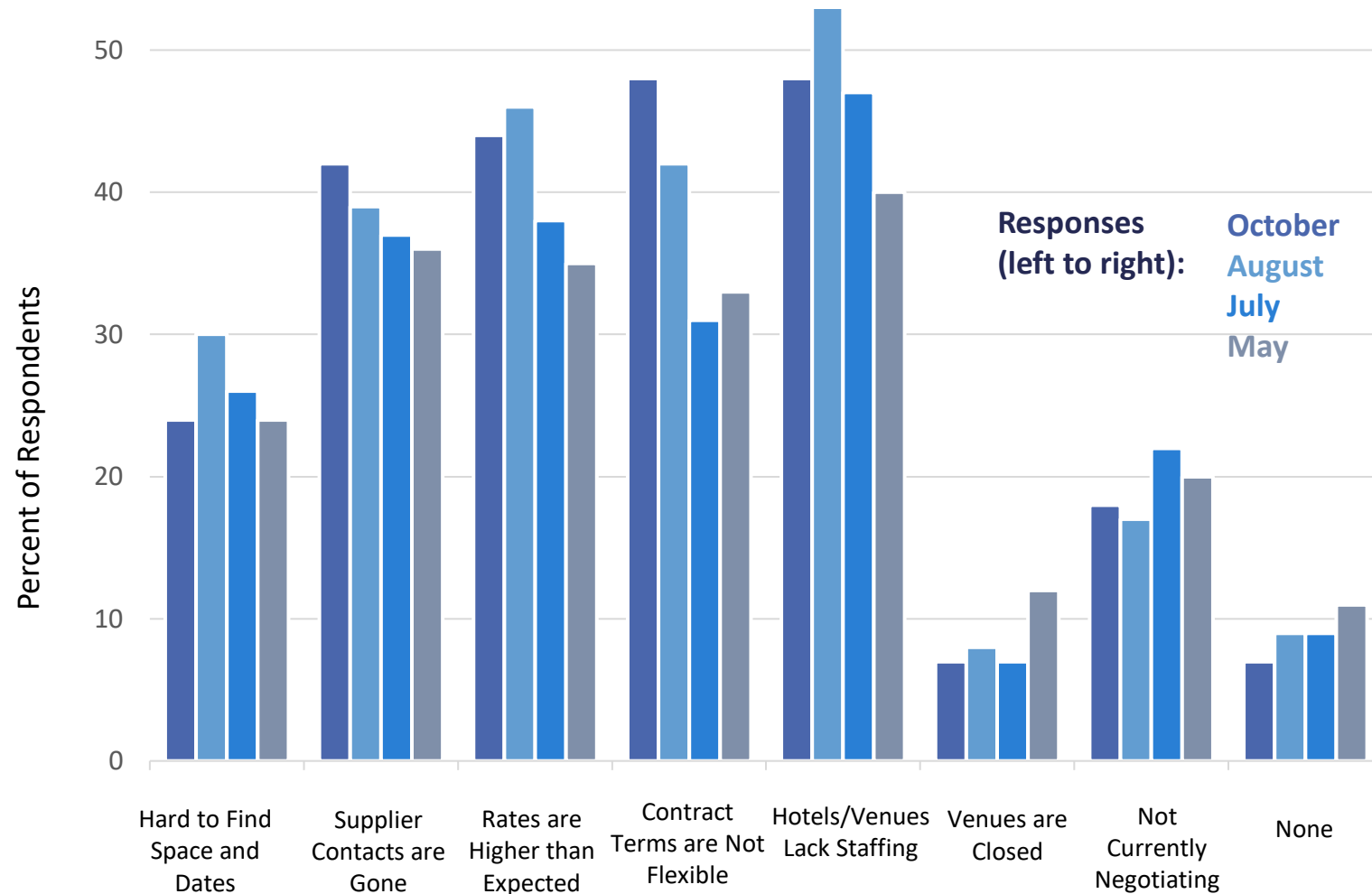
44.05%

48.02%

48.23%

6.89%

17.75%



October 6, 2021

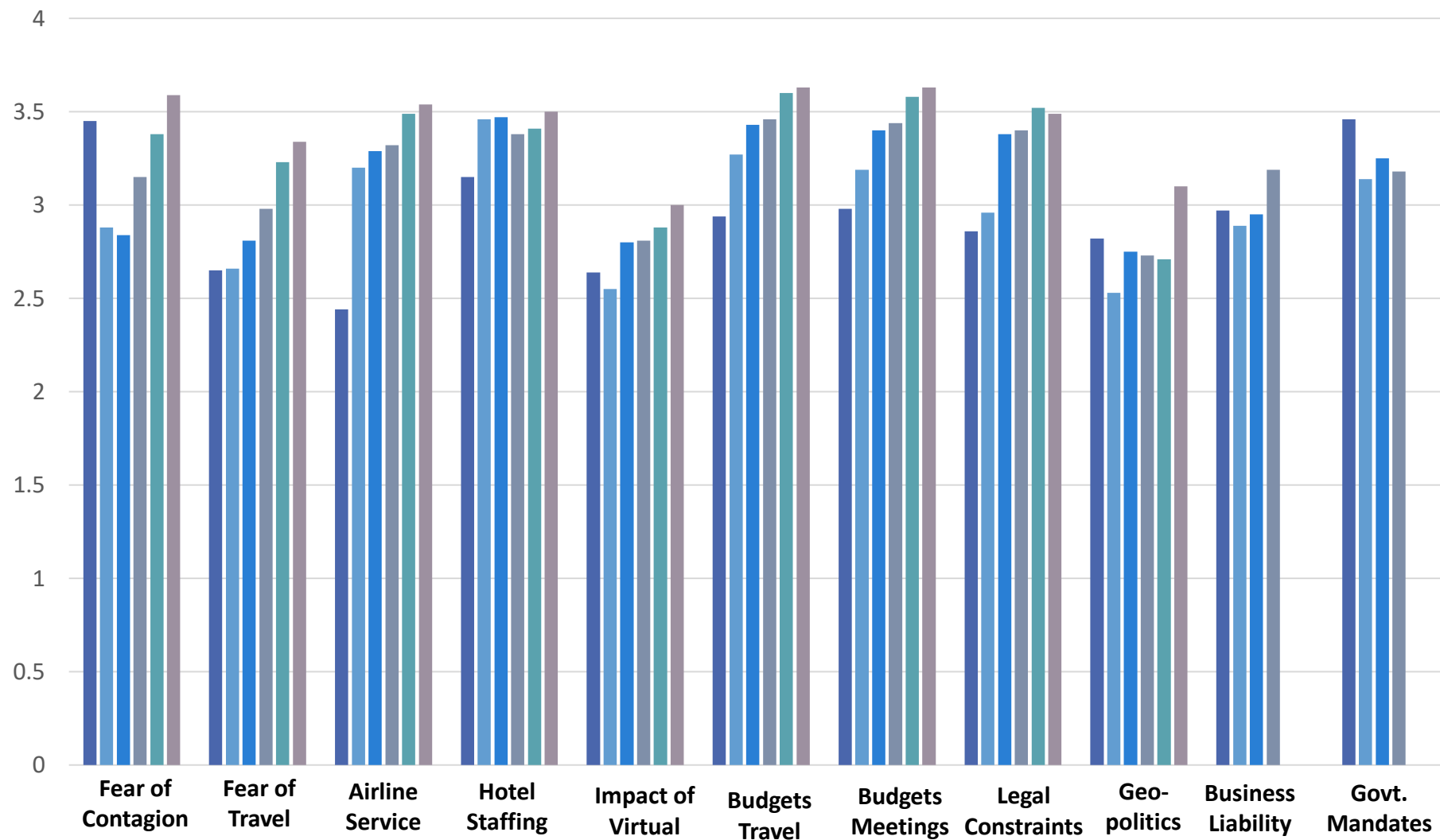
Fear of Contagion Reemerges as Planners' Top Concern

Worries about airline service have decreased; government mandates are as concerning as contagion.

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"). Ranked by weighted average.

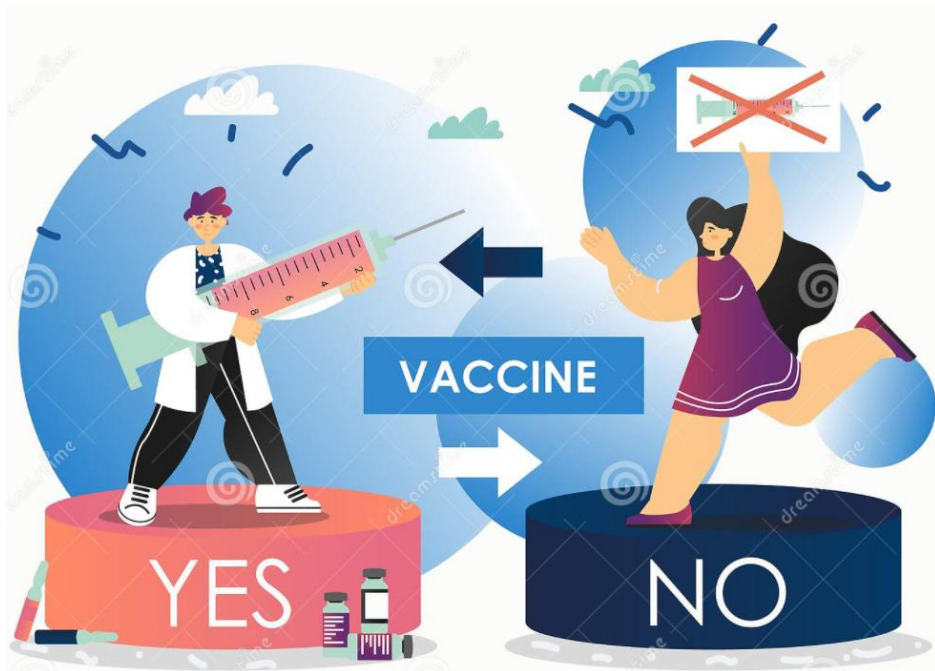
Responses
(left to right):
October
July
May
April
March
January

October 6, 2021



To Vaccinate or Not to Vaccinate?

More say “yes” than “no,” but over one-third say they don’t support the industry’s advocacy for proof of vaccination to participate in business events, or they’re still “not sure.”



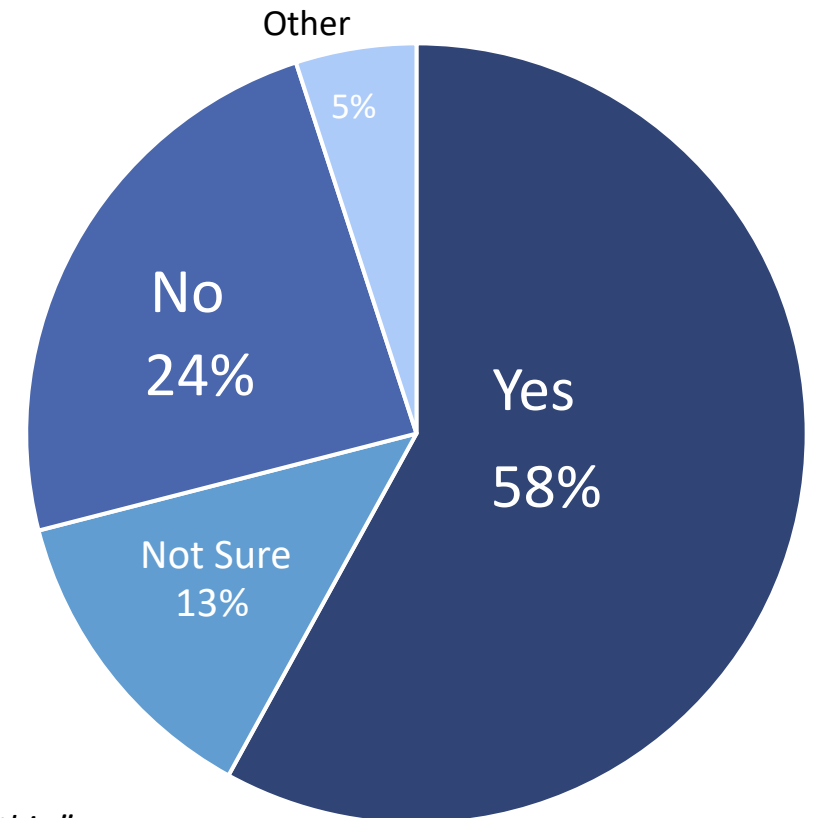
Other Verbatim Comments:

“I prefer requiring negative testing only. It’s less controversial and provides a higher level of safety.”

“I do but my clients do not.”

“We don’t have the staff nor the resources to support and enforce this.”

Many events and organizations in the meetings industry have advocated for proof of vaccination to participate in business events? Do you support this position?



October 6, 2021

In Summary:

- ✓ New booking continues a downward trend, even though rescheduling appears to have waned, at least for now.
- ✓ Nearly two-thirds of planners cancelled, rebooked or changed their events recently. Far fewer planners expected to need to take such action in August.
- ✓ Concerns for safety, declining expectations for participation were the primary reasons for the cancellation/rebooking wave.
- ✓ Most planners are looking to 2022 and later for their next event, down from two-thirds expecting their next event before year-end.
- ✓ Planners are not unanimous about protocols, or vaccinations; data indicates they'll fall back on state and local mandates, if they do anything.
- ✓ Inflexible contract terms is the most vexing issue when dealing with hotels/venues.

Selected Verbatim Comments:

- “We cancelled one event because the restrictions would not have allowed for the experience that we have traditionally delivered for our attendees, which places a key emphasis on networking. However, we proceeded with a smaller, less networking-oriented event in September, with minimal restrictions at most venues.”
- “We just completed an in-person event in September; we only had 1/4 of our usual attendees. We have now created a follow-up virtual conference to offer to our greater global community. We will not be hosting another in-person event until we are clear of this.”
- “Due to the fact that there has been so much turnover with staffing at CVB's, convention centers, and hotels, going back to holding in-person events will be like training the staff about our event all over again.”
- “Given the changing scope of the meetings and events industry I'm curious as to how many have or are toying with the idea of leaving the industry. I know many hoteliers who have changed career paths. What affect has the era of COVID had on meeting planners and their desire to stay in the game or jump ship?”
- “For events that strictly provide information, it is not necessary to hold an in-person event. Only where strategic planning or networking are critical do I expect meetings to return to in-person. Business travel and meetings will be severely reduced in the future.”
- “I am finding that attendees are using Covid-19 as an excuse right before the event to cancel and get refunds. I hope this will not be a trend.”