



PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: MAY 4-7

COVID-19 Recovery Dashboard

Survey and analysis by PCMA *Convene* editors

Charts and design by Point Five

The best we can do during the COVID-19 crisis is to continue to learn from each other as we try to plan ahead in an uncertain and rapidly shifting world. Here are the results of our second biweekly check-in, conducted during the first week in May, to determine how the business events community is coming to terms with the coronavirus crisis, imagining events in the near future, and reskilling for the long term. Over the course of four days, 1,388 respondents participated; 935 planners and 453 suppliers.

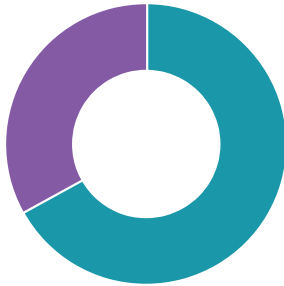
In this third in our COVID-19 surveys, we introduced a new question for those who are in the business of attracting, hosting, and supporting attendees from all over the world: In the absence of a therapeutic treatment or vaccine for the COVID-19 virus, what is the farthest distance *you* would consider traveling to a business event in 2020, assuming there are no financial or regulatory restrictions placed on travel?



MAY 4-7 PLANNER TRACK
APRIL 20-23

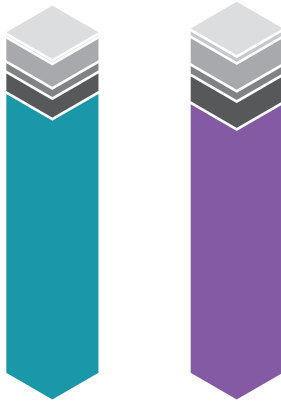
MAY 4-7 SUPPLIER TRACK
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What best describes your role in the business events industry?



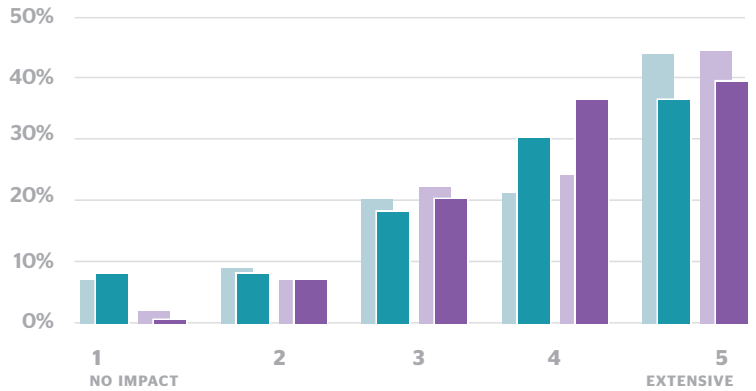
67% Business events professional
33% Supplier serving business events professionals

What region best represents where you do the majority of your business?



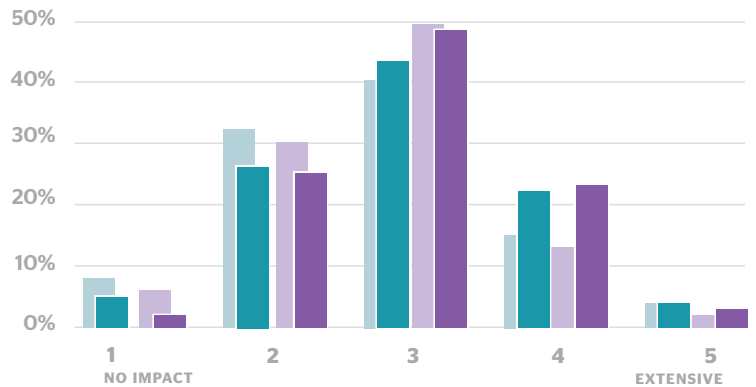
82% U.S.	79% U.S.
6% Canada	8% Canada
3% APAC Region	3% APAC Region
7% EMEA region	8% EMEA region
1% Latin America	2% Latin America

To what extent do you believe the rise in the use of digital-event technology will cannibalize face-to-face attendance at your event/s in the **next three months** on a scale of 1 to 5?



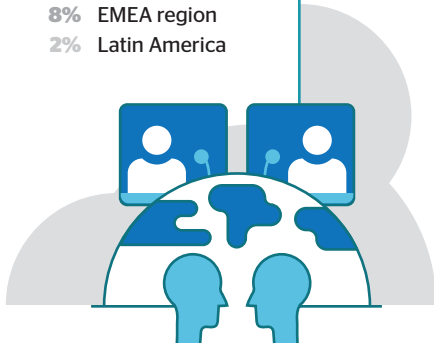
The weighted average of the impact of digital on face-to-face event attendance went **down slightly** – from 3.85 to 3.79 – between the two weeks (for both planners and suppliers).

To what extent do you believe the rise in the use of digital-event technology will cannibalize face-to-face event attendance at events **in 2021** on a scale of 1 to 5.



The weighted average of the impact of digital on face-to-face event attendance went **up slightly** – from 2.75 to 2.93 – between the two weeks (for both planners and suppliers).

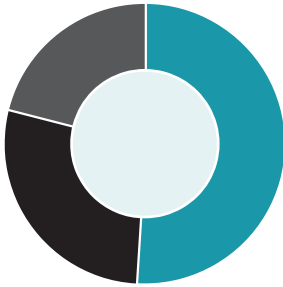
This suggests a shift: As the pandemic wears on, professionals are thinking that the rise in digital events will have a longer-term negative impact on attendance at in-person events.





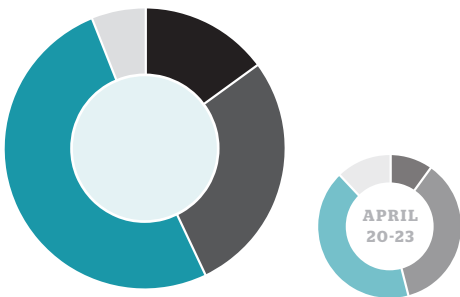
PLANNER TRACK

Are you planning to redesign an existing face-to-face event for a digital platform in the next three months?



- 51%** Yes, the entire program will be online.
- 28%** Yes, there will be a digital component.
- 21%** No

When the pandemic crisis passes, what scenario do you think best describes the recovery of face-to-face meetings for the business events industry in your geographic region?



- 15%** There will be pent-up demand for all groups to meet face-to-face.
- 28%** People will be hesitant to travel to meet face-to-face.
- 51%** Smaller local and regional events will thrive before national and international groups gather.
- 6%** Other

'We Have to Prepare for an Entirely New Way'

Planners talk about possible recovery scenarios and challenges.

"No one is anxious to get out there and be the guinea pig and risk contracting the coronavirus. People will be hesitant to meet face-to-face, even if they don't have to travel far. Holding in-person events will require enacting social-distancing measures, and that creates a host of challenges."

"People will be much more choosy about the events they attend. They'll only travel to attend the events that really matter to them."

"Your queries are slanted. It presumes the same mindset used, prior to COVID-19, will be relevant. Therefore, the data is not relevant to the real problem and opportunity. That being: How might we co-exist with COVID-19."

"I cannot imagine a world where extroverts will 'settle' with online events. There has to be something awfully compelling about online events that will ever trump a live one. I've watched/semi-participated in too many online conferences and have felt nothing but dread with wondering how the heck I'm going to create any worthwhile engagement with our online event. The thought of it makes me sick."

"The premise of the question is flawed. We can't think of when 'the crisis passes.' We have to prepare for an entirely new way of holding events in a world where rational people are afraid to even go to a movie theater, much less a large event like a conference or keynote speaker. The old models of event planning are simply not feasible in the new world we're facing. We have to be prepared to leave them in the past."

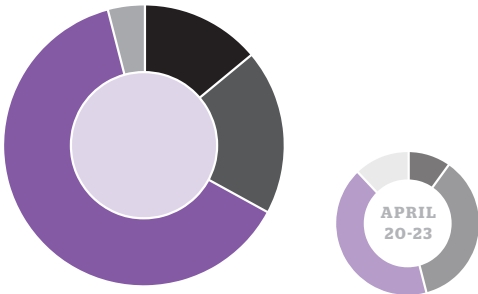
"Budget constraints from the economic downturn will exist beyond the crisis and impact overall event attendance into the future regardless of the event size."





SUPPLIER TRACK

When the pandemic crisis passes, what scenario do you think best describes the recovery of face-to-face meetings for the business events industry in your geographic region?



- 14%** There will be pent-up demand for all groups to meet face-to-face.
- 19%** People will be hesitant to travel to meet face-to-face.
- 63%** Smaller local and regional events will thrive before national and international groups gather.
- 3%** Other

6%

MORE SUPPLIERS BELIEVE THERE WILL BE PENT-UP DEMAND FOR ALL GROUPS TO MEET FACE-TO-FACE THAN TWO WEEKS AGO



'We Don't Know Which Way It Will Go'

Suppliers talk about possible recovery scenarios and challenges.

"People will want to meet. But likely large events will be a thing of the past. Just because COVID-19 passes, doesn't mean there won't be another [virus]. Additionally, corporations will be dictating when/if their employees can travel."

"While there may be a pent-up demand for face-to-face [meetings], I am concerned that organizations will be hesitant to ask employees to travel for liability reasons. I am also concerned about budgets in industries that have been impacted financially by the shutdowns."

"We HOPE there will be a pent-up demand and all strategies are based on reminding people they are missing out. However, there is the concern now that people know how to virtually attend events and meetings that they will want that option instead. It is cheaper than travel, accommodations, etc. We don't know which way it will go."

"National events will happen, depending on the opening of the states. They will be scaled back as people will be more hesitant to travel, so there will be a good opportunity to supplement with free or reduced-cost virtual attendance to get them excited to come back to the live event next year."

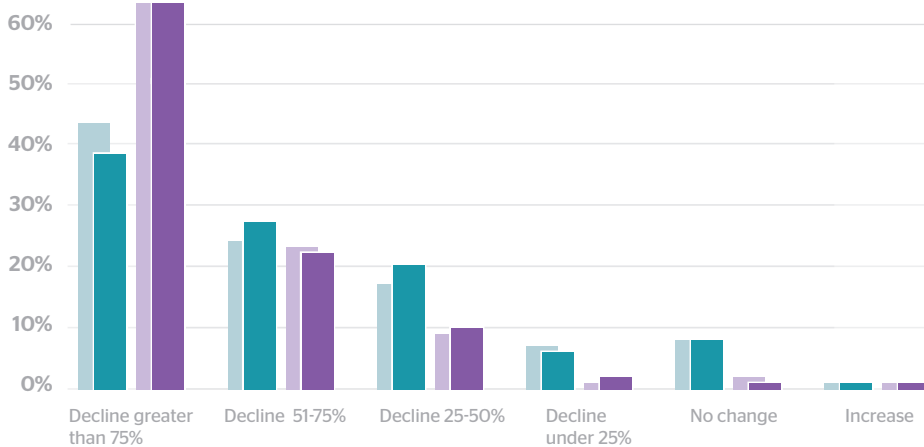
"Some of each. There will be pent-up demand (we ARE human); we will be hesitant because we are still dealing with a large unknown; and smaller meetings will lead the way."



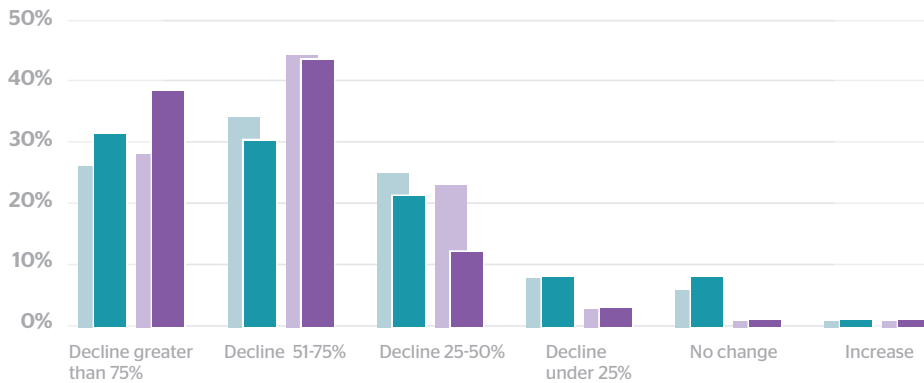
■ MAY 4-7 PLANNER TRACK
■ APRIL 20-23

■ MAY 4-7 SUPPLIER TRACK
■ APRIL 20-23

What do you believe will be the overall revenue impact of COVID-19 on your events-related business during the **next three months**?



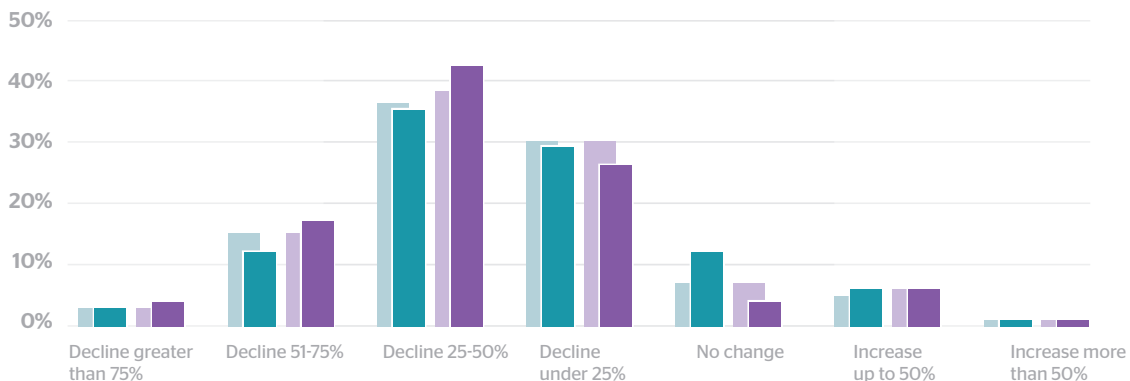
What do you believe will be the overall revenue impact of COVID-19 on your events-related business for the **rest of 2020**?



10%

MORE SUPPLIERS IN THIS SURVEY COMPARED TO TWO WEEKS AGO THINK THAT THERE WILL BE A DECLINE GREATER THAN 75%

What do you believe will be the overall revenue impact of COVID-19 on your events-related business for **2021**?

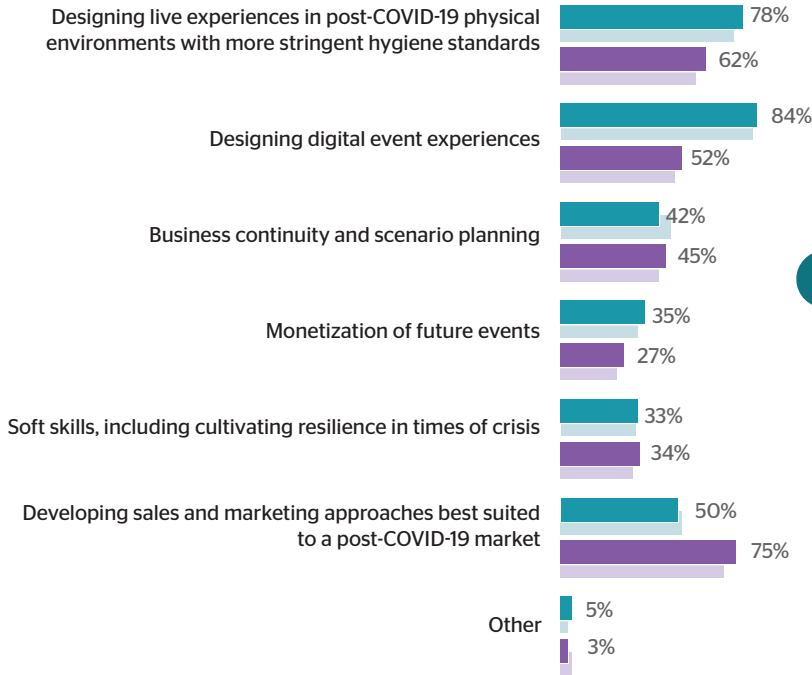




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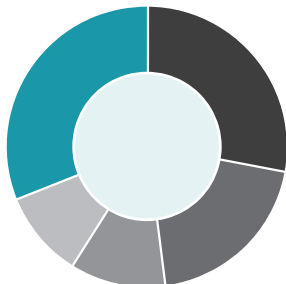
MAY 4-7 SUPPLIER TRACK
APRIL 20-23

In order to prepare professionally for success in the business events industry during the recovery, which new skills do you think you need to pursue/develop?

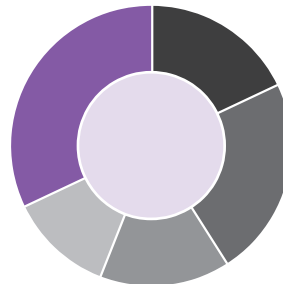


NEW QUESTION FOR MAY 4-7 SURVEY:

In the absence of a therapeutic treatment or vaccine for the COVID-19 virus, what is the farthest distance from your home you would consider traveling to a business event in 2020, assuming there are no financial or regulatory restrictions placed on travel?



- 28%** I would not travel
- 20%** Within a four-hour drive
- 11%** Within a two-hour flight
- 10%** Within a five-hour flight
- 31%** Any distance necessary if the program was worth it



- 17%** I would not travel
- 23%** Within a four-hour drive
- 15%** Within a two-hour flight
- 12%** Within a five-hour flight
- 32%** Any distance necessary if the program was worth it