

# COVID-19 Recovery Dashboard

Survey and analysis by PCMA *Convene* editors

Charts and design by Point Five

If we were to pinpoint just one thing from our latest COVID-19 Recovery Dashboard survey that indicates just how quickly the events industry has shifted in the last six months, it would be an email we received after we invited professionals to participate in the survey on Aug. 17. Barbara J. Armentrout, CAE, managing partner at the Mesa Group, took issue with

the wording of several survey questions that asked to what extent respondents believe the rise in the use of digital-event technology will cannibalize face-to-face attendance at their event/s (for the rest of 2020 and in 2021).

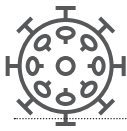
“I wanted to note that I STRONGLY OBJECT to the use of ‘cannibalize’ in the questions,” she wrote. “To me, this shows far too much bias in the desire to return things to the way they used to be, when we all must acknowledge some truths including that the meeting industry was long overdue for a major overhaul and sadly, the pandemic has provided the essential impetus to get that done. It’s an awful situation but the old style was stale, losing ROI, and needed a major facelift. To say that any new format or technology ‘cannibalizes’ is to fail to show resilience, courage, and creativity. And we need all three in abundance.”

Barbara, thanks for pointing out what we should have realized ourselves. We immediately changed “cannibalize face-to-face attendance” to “impact face-to-face attendance” in the survey questions. And in fact, both planners and suppliers expect digital tech will have a greater *impact* throughout the rest of this year — an average of 57 percent in August vs. an average of 47 percent in last month’s survey say the impact will be extensive. And as far as 2021 is concerned, more planners and suppliers expect digital to have a higher impact on their face-to-face events than a medium impact — the reverse of last month’s results. The readiness to fully embrace digital is also evidenced by the fact that 64 percent of planners vs. 53 percent in July said they are redesigning an existing face-to-face event entirely for a digital platform in the next three months.

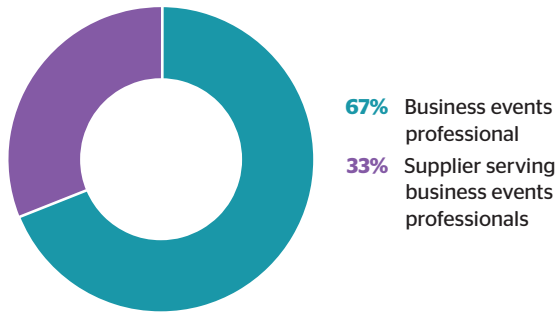
Here are some additional changes we’ve seen over the last month:

- Planners are less inclined to think that there will be a pent-up demand for all groups to meet face-to-face once the pandemic crisis passes — 14 percent vs. 19 percent last month cited this as the most likely recovery scenario. Meanwhile, suppliers are more optimistic than last month: 18 percent vs. 14 percent believe there will be a pent-up demand to meet in person.
- Suppliers are focusing more sharply on what skills they will need during the recovery, with more respondents this time around citing the need to know how to design live experiences in post-COVID-19 physical environments than designing digital experiences. Also, 32 percent vs. 22 percent in last month’s survey said they are focusing on the monetization of future events.

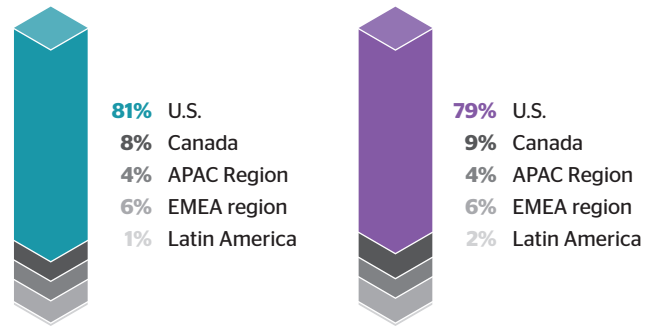
And while slightly more planners than those who responded in July see hybrid events as the most likely recovery scenario, only one-third said that they are seeking broadcasting facilities in their site-selection process — a question we asked for the first time in this latest survey. Also new: We asked if planners are satisfied with their tech solutions for digital platforms — 63 percent said yes — and if planners and suppliers have joined online communities to help navigate the pandemic. More than half have, primarily on social media and largely to share ideas in unfamiliar times and facing an uncertain future — as Barbara would hope, with “resilience, courage, and creativity.”



What best describes your role in the business events industry?



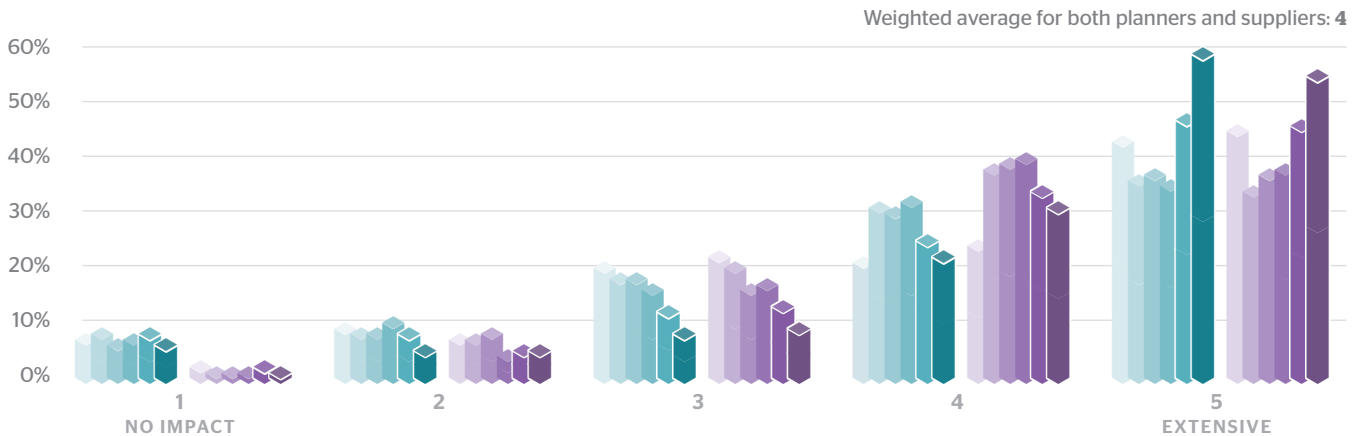
What region best represents where you do the majority of your business?



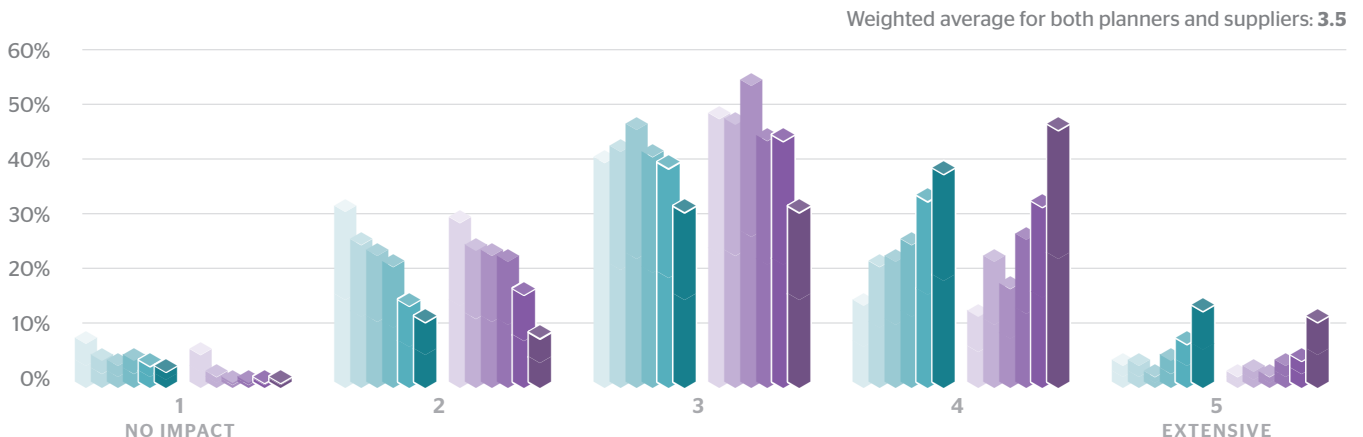
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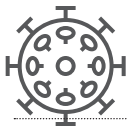
**SUPPLIER TRACK**    APR 20-23    MAY 4-7    MAY 18-21    JUN 15-18    JUL 13-16    AUG 17-20

To what extent do you believe the rise in the use of digital-event technology will impact face-to-face attendance at your event/s **for the rest of 2020** on a scale of 1 to 5?



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



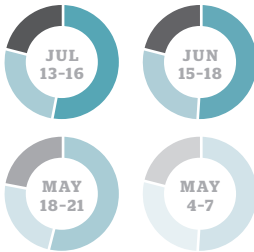


## PLANNER TRACK

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



**64%** Yes, the entire program will be online.  
**18%** Yes, there will be a digital component.  
**18%** No



Are you seeking out broadcasting facilities in your site-selection efforts for future hybrid events?



**33%** Yes  
**67%** No

Are you satisfied with your tech solutions for your online events?



**63%** Yes  
**37%** No

## PLANNER TRACK

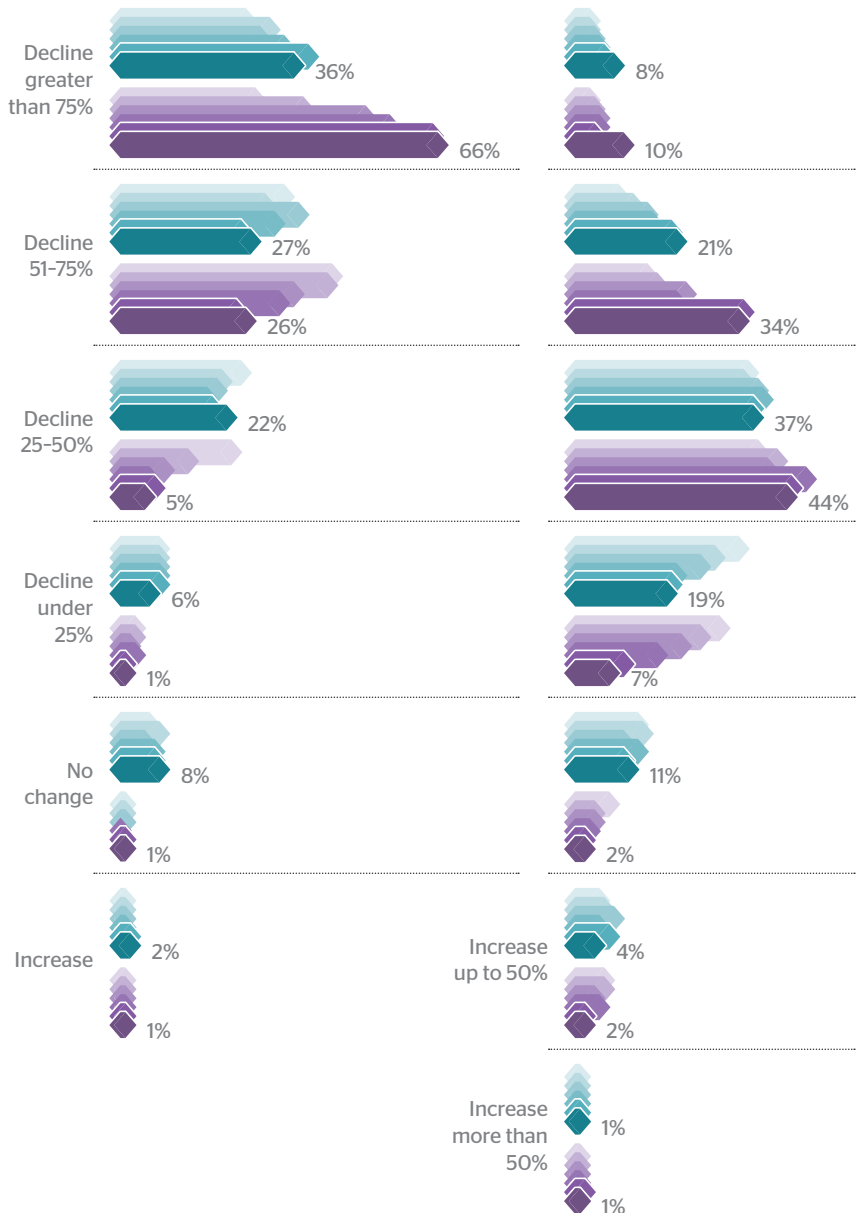
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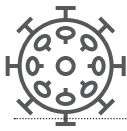


When compared to the same period in 2019, what do you believe will be the overall revenue impact of COVID-19 on your events-related business

for the **rest of 2020**?

for **2021**?





## PLANNER TRACK

What is your biggest financial challenge with regard to planning a business event in 2021?  
(Please choose one.)



- 40%** Budgeting/pricing for a hybrid (in-person + digital) events
- 22%** How to budget in terms of face-to-face attendance expectations
- 7%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 9%** What to charge digital participants
- 6%** What to charge digital event exhibitors/sponsors
- 5%** Expenses related to event marketing and communications in a post COVID-19 world
- 2%** Deciding on registration pricing for face-to-face participants
- 9%** Other

### 'Inability to Make Commitments'

Creating budgets and planning for events where there is no way to guarantee attendance are among the financial challenges weighing on planners.

*"Inability to make commitments at this time in any form because we do not know what will happen in the foreseeable future for allowances that are specific to every location."*

*"Significant decreases in sponsorship, exhibit, and registration fees."*

*"How to budget in general, not knowing if/when we can meet in person or what the desire is for high-production virtual events."*

*"Our board is not considering digital, and has canceled instead of adapting."*

*"The constantly changing regulations landscape (local, state, federal). How do you budget for F2F when you don't know how what the max capacity numbers might be?"*

*"How do you budget when you don't know what to charge and who will show up vs. who will do virtual? And what exhibitors/sponsors will commit to when you can't guarantee any attendees? It's really planning with no history or guarantees."*

*"Declining attendance for events booked years in advance – how to estimate face-to-face attendees versus virtual – could be devastating for years to come."*

*"Hotels not honoring force majeure for future years and the subsequent penalties we will need to pay to move or cancel meetings into 2022 due to COVID-19."*

*"How to manage for insurance claims."*

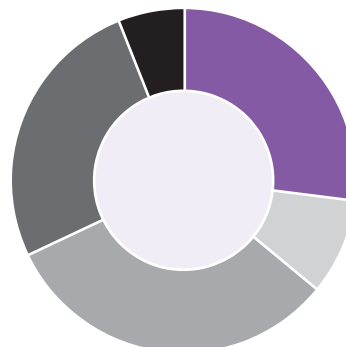
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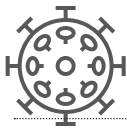
In the absence of a therapeutic treatment or vaccine for the COVID-19 virus, what is the farthest distance from your home you would consider traveling to a business event in 2020, assuming there are no financial or regulatory restrictions placed on travel?



- 42%** I would not travel.
- 3%** Within a two-hour flight.
- 24%** Any distance necessary if the program was worth it.
- 22%** Within a four-hour drive.
- 8%** Within a five-hour flight.



- 27%** I would not travel.
- 9%** Within a two-hour flight.
- 32%** Any distance necessary if the program was worth it.
- 26%** Within a four-hour drive.
- 6%** Within a five-hour flight.



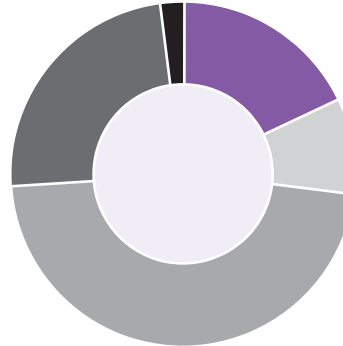
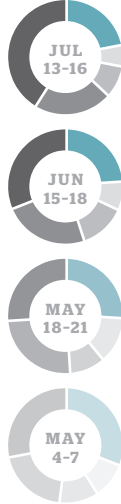
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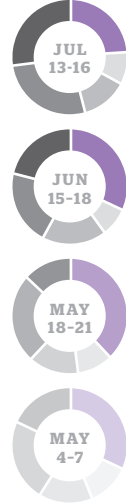
When the pandemic crisis passes, what scenario do you think best describes the recovery of face-to-face meetings for the business events industry in your geographic region?



- 14% There will be pent-up demand for all groups to meet face-to-face.
- 18% People will be hesitant to travel to meet face-to-face.
- 33% Smaller local and regional events will thrive before national and international groups gather.
- 30% Small in-person events will be hybrid, with a digital version for a larger audience.
- 5% Other



- 18% There will be pent-up demand for all groups to meet face-to-face.
- 9% People will be hesitant to travel to meet face-to-face.
- 47% Smaller local and regional events will thrive before national and international groups gather.
- 24% Small in-person events will be hybrid, with a digital version for a larger audience.
- 2% Other



## PLANNERS SPEAK

*"I think it's going to be a combination of the last three scenarios. People will be hesitant to meet, but smaller events will happen before larger. I'm certain there will be a hybrid component to many of our meetings in 2021, with some potential stickiness there for beyond."*

*"I think smaller and regional events will make a comeback before larger/national/international events. We fully expect most of our events to carry a hybrid solution going forward."*

*"Our market is dominated by youth sports events, so since they are outside-type events, we are already seeing nearly normal room rentals/bookings at our local hotels. However, these events are drawing smaller spectator crowds — mainly parents of players and coaching staffs. If we can broadcast these events via the web, then many elder family members can also view the games/events online for safety reasons."*

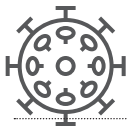
*"Learning expectations and budgets will be changed for some time (maybe through 2024-2025). People will no longer see the need to get on a plane to watch someone present a PowerPoint presentation. People will expect to be able to access content digitally on demand, on their schedule. Just as the presumed need for office space has changed, the need for in-person learning has changed. Conferences will need to focus on what attendees can uniquely achieve when they are together in person (e.g., hackathon, learning cohorts). I produce the National Charter Schools Conference and we are very concerned about massive state education budget cuts and money being spent on health and safety decimating travel and PD budgets. I'd like to be a part of thinking through how the industry needs to change/evolve. We are planning NCSC21 as a hybrid event with 500-1,000 in-person attendees with 2,000-4,000 participating virtually."*

*"There will be a desire to meet F2F, but lingering travel restrictions could make this a challenge for us. Our participants are global and there are severe equity issues with hybrid models for our highly participatory meetings, so our return to 'normal' will be a long way off until there is a global solution!"*

*"There is eagerness to return to face-to-face, but it depends on resolution of pandemic issues and the audience. Medical associations in particular deal with savvy attendees surrounding safety."*

## SUPPLIER PERSPECTIVE

*"Smaller local and regional events will thrive before national and international groups gather AND small in-person events will be hybrid, with a digital version for a larger audience."*



**PLANNER TRACK**

APR 20-23

MAY 4-7

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**SUPPLIER TRACK**

APR 20-23

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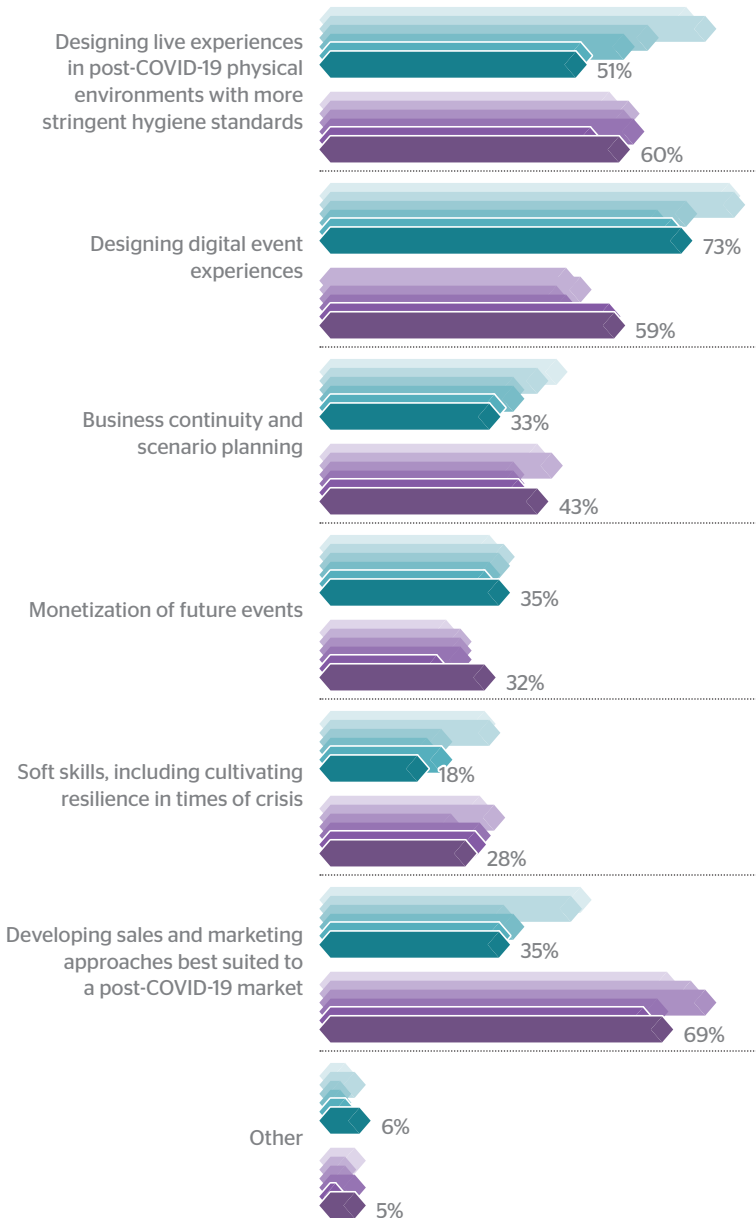
MAY 18-21

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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?



**PLANNERS SPEAK**

Learning hybrid meeting scenarios, including safety issues, was top of mind.

*“Gaining confidence that suppliers will execute new protocols — making stakeholders and attendees more comfortable and eliminate this chaos.”*

*“A whole new career, not in meetings or hospitality.”*

*“Engaging F2F and virtual participants in an equitable way, if and when we can start doing hybrid events rather than all virtual.”*

*“Designing hybrid events and budgeting them appropriately for the different face-to-face and digital scenarios.”*

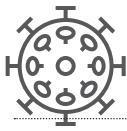
*“Designing a series of smaller regional events versus larger national events. More work for less revenue.”*

*“Design better attendee engagement options especially for hybrid programs.”*

**SUPPLIER PERSPECTIVE**

*“The skills we need to improve our standards of care for cleaning and sanitizing, and improving our customer options. We need to do this and then to shout it from the rooftops. We are making these changes and they are here to stay.”*

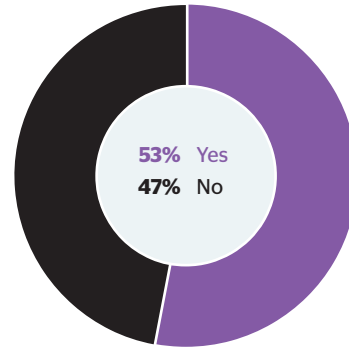
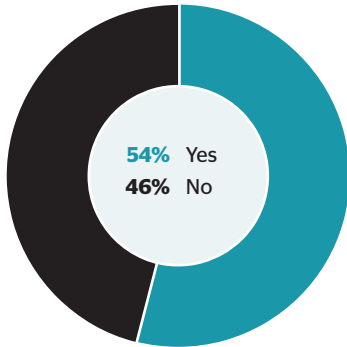
*“Creating a remote/on-site interactive cohort that ensures safety on site while engaging those online.”*



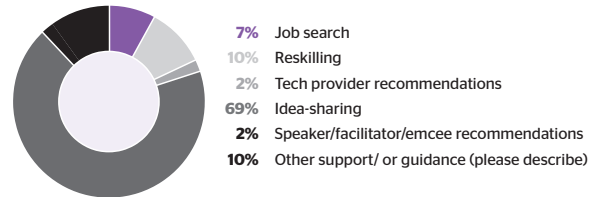
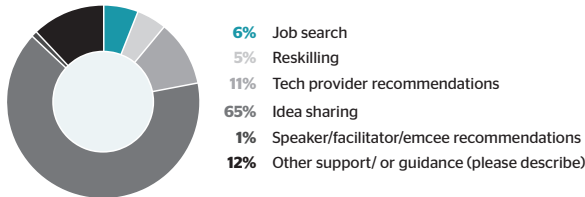
## PLANNER TRACK

## SUPPLIER TRACK

Have you joined any online community groups to help you navigate the crisis?



In what areas are you looking for help from the community group?



Planners who answered “other” listed a variety of topics, including business continuity, leadership management, contracts, and job searching.

*“All of the above, plus sharing links to free webinars and other resources. And humor. We always need humor during dark times.”*

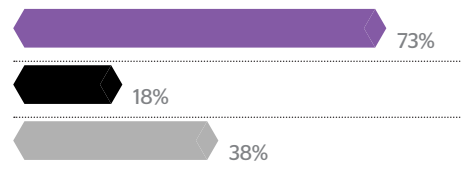
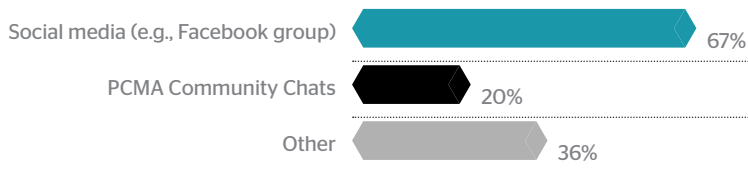
*“These trusted groups have become my lifeline to knowledge, growth, technical real-time stories, and most importantly, camaraderie with others in the same situation.”*

*“Open conversation among planners only [on topics such as] challenges with vendor partners and contracting. ... Overall this industry seems primarily focused on commercial entities and is not effectively considering the concerns of planners (and ways to address that).”*

*“Live-event safety guidance procedures and protocols, case studies if possible, and sharing monetization ideas for virtual [events].”*

*“A combination of the above ... job search, reskilling and redirecting my business, tech provider recommendations, speakers... . I am an independent planner and run a micro business. [I am] seeking other ways to generate sufficient income.”*

On what platform does the community group you participate in meet?



A majority of the 46 planners answering “other” to this question meet through association groups. Zoom is the most common tool used to meet, but others mentioned include:

- ConferenceDirect, via colleague, team, and company-wide groups
- Facebook and other virtual platforms that have a variety of business-focused groups and organizations
- Slack
- WebEx
- Conference calls, meeting association chatrooms, and emails