

PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: SEPTEMBER 21-24

# COVID-19 Recovery Dashboard

Survey and analysis by PCMA *Convene* editors

Charts and design by Point Five

When the lockdowns began in the U.S. in March, we hoped we'd have COVID-19 well under control by the fall. In other words, by now. But, as we enter the last quarter of 2020, we've come to accept that we will be living with COVID-19 well into 2021 and perhaps 2022 —

and that its effects on the economy will linger, certain consumer and workplace behaviors have changed for good, and that the business events industry will look markedly different from now on.

These sentiments were reflected in the responses of more than 800 business events professionals — 558 planners and 231 suppliers — who participated in the latest COVID-19 Recovery Dashboard survey, conducted Sept. 21-24. One planner said as much in describing the scenario he or she thought best illustrated the business events recovery:

“I guess I feel that this is with us from here on out — meaning that once a vaccine is developed, we'll still have to contend with people being vaccinated and society reaching herd immunity. So, people may be slow to come back to large group gatherings because they may still not feel safe. Also, virtual meetings have now demonstrated that we can obtain access to content without needing to travel. For those who didn't like to travel/had time restrictions around traveling, they're going to expect a virtual component. Also, some audiences' budgets have been frozen. When will that end? We may see reduced in-person attendance because of lack of funding for travel on the part of attendees. For some of us, I think we're going to have to [reimagine] our meeting model — that could mean moving to all-virtual, having smaller in-person gatherings with larger online presences, smaller meetings we hold on a regional basis, etc. I think it will depend on the association and what their constituents demand.”

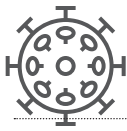
A reckoning with COVID-19's long-term effects on the business events industry is evident in how some of the responses in this survey compare with those of just a month ago — particularly in terms of revenue losses. A significantly greater percent of both planners and suppliers expect losses in the 50- to 75-percent range in 2021 compared to responses in August.

Meanwhile, some responses this month may indicate a greater willingness to participate in and conduct live events in the current environment.

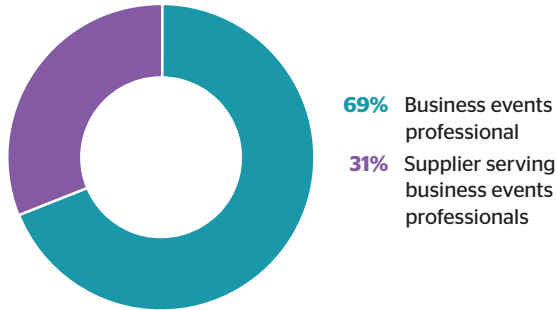
For example, in this month's survey, we asked two new questions: Have you attended a face-to-face event in the last few months requiring the use of PPE and other safety protocols? And if so, how would you describe your experience?

While only a minority — 17 percent of planners and 31 percent of suppliers — said they had attended an in-person event recently, the majority indicated that they were not put off by all the measures necessary to meet safely today: Sixty-five percent of planners and 74 percent of suppliers said they would do it again. Thirty-one percent of planners and nearly one-quarter of suppliers gave the experience an “okay” rating and said they didn't think it was a viable option for most groups. Only 5 percent of planners and 2 percent of suppliers said they didn't find it enjoyable and wouldn't do it again.

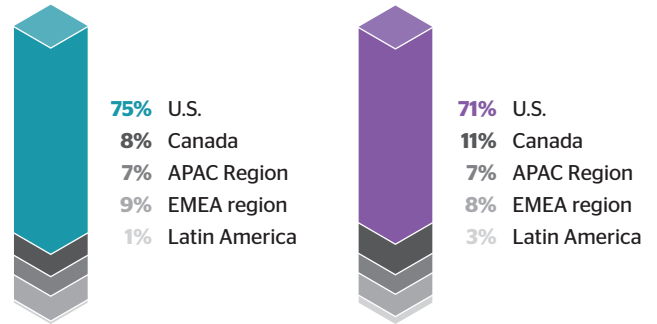
The responses to one question in particular this month revealed changing sentiments about live events — both pro and con. Once again, we asked how far respondents would be willing to travel to attend an in-person event in the absence of therapeutic treatment or a vaccine for COVID-19. Thirteen percent of planners, compared to just 3 percent in the August survey, and 18 percent of supplier respondents — double that of last month's survey — said they would be willing to take a two-hour flight, which we may attribute to a greater awareness of airline carriers' stringent safety measures. But on the other end of the spectrum, this month, a slightly higher percentage of planner and supplier respondents, 44 percent and 30 percent, respectively, said they would not travel in the absence of a COVID-19 vaccine.



What best describes your role in the business events industry?



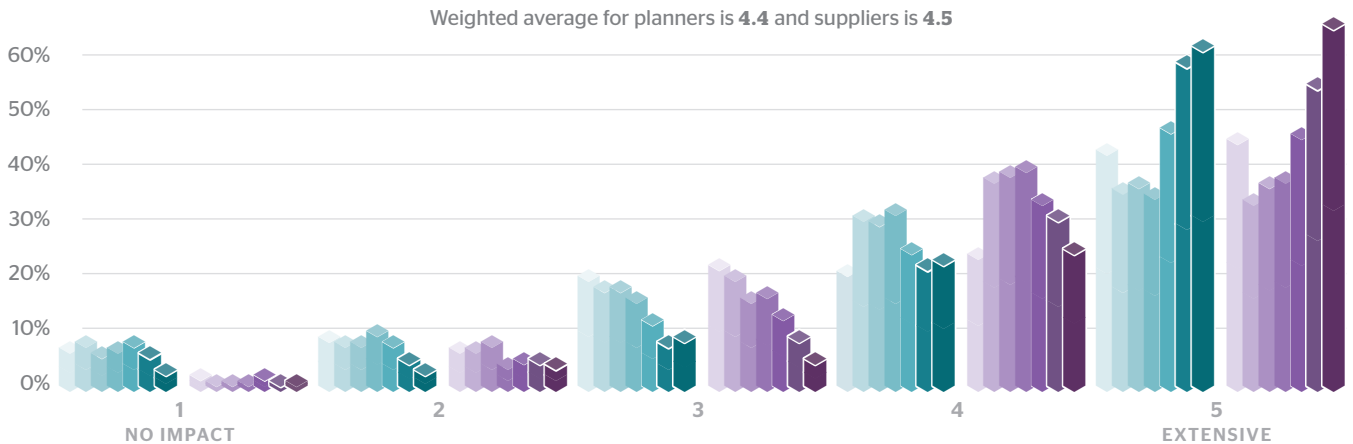
What region best represents where you do the majority of your business?



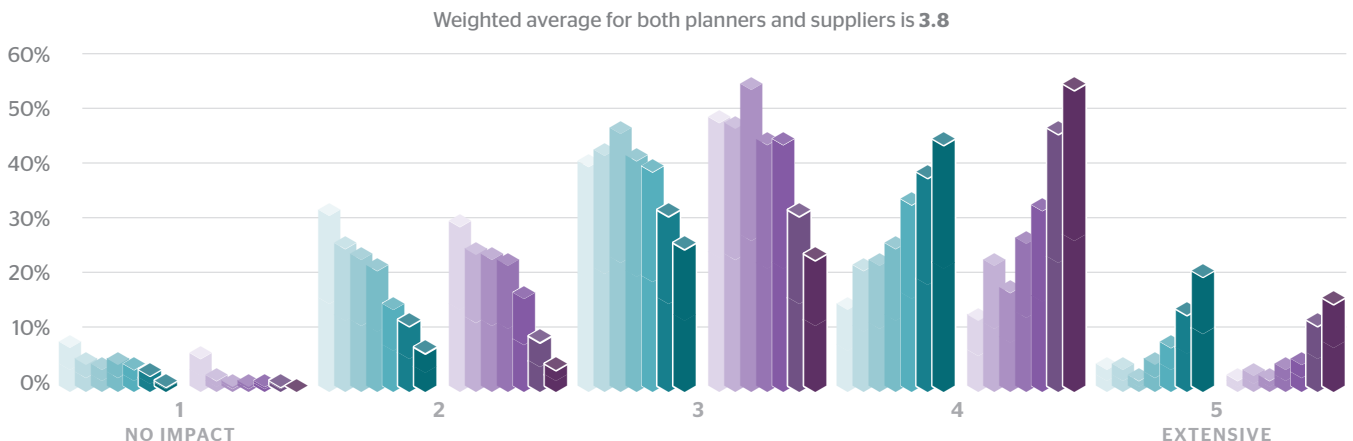
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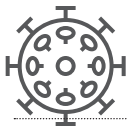
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To what extent do you believe the rise in the use of digital-event technology will impact face-to-face attendance at your event/s **for the rest of 2020** on a scale of 1 to 5?



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.



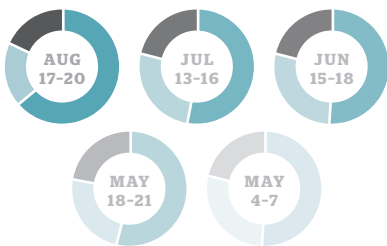


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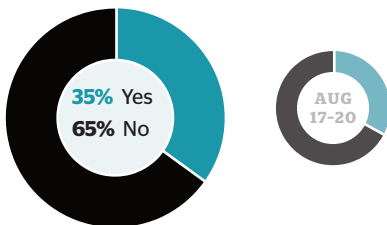
Are you planning to redesign an existing face-to-face event for a digital platform in the **next three months**?



**62%** Yes, the entire program will be online.  
**16%** Yes, there will be a digital component.  
**22%** No



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



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

**69%** Yes

No **37%**

## PLANNER TRACK

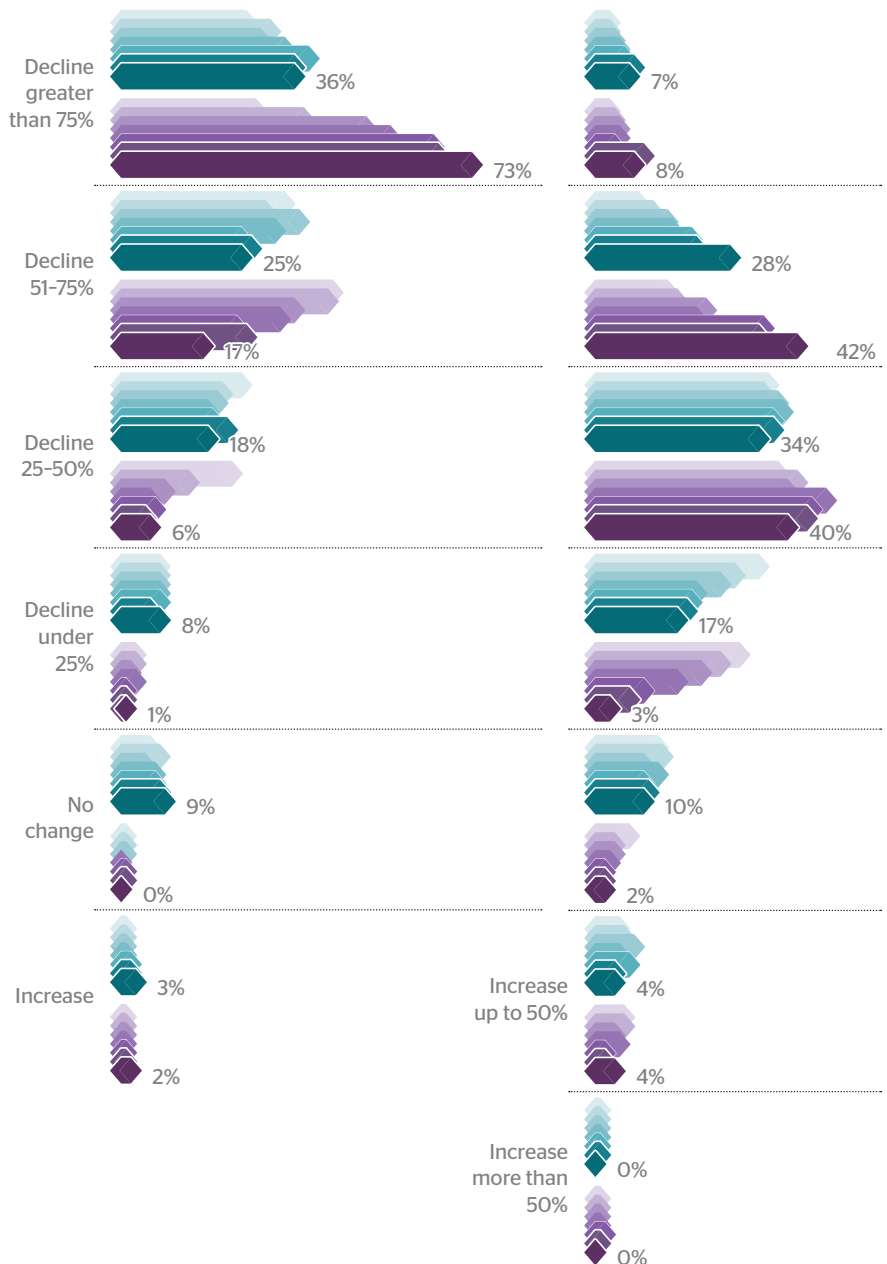
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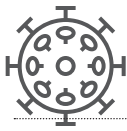


When compared to the same period in 2019, what do you believe will be the overall revenue impact of COVID-19 on your events-related business

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.)



- 42%** Budgeting/pricing for a hybrid (in-person + digital) events
- 24%** 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
- 7%** What to charge digital participants
- 6%** What to charge digital event exhibitors/sponsors
- 6%** Expenses related to event marketing and communications in a post COVID-19 world
- 1%** Deciding on registration pricing for face-to-face participants
- 8%** Other

## PLANNER TRACK

## SUPPLIER TRACK

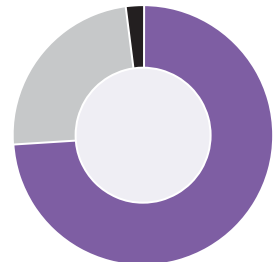
Have you attended a face-to-face event in the last few months requiring the use of PPE and other safety protocols? If you answered “yes”, please choose the statement that best describes your experience.

**17%** Yes



- 65%** It was worth all the precautions and safety measures – I would do it again.
- 31%** It was okay, but I don't see this as a viable option for most groups.
- 4%** Not at all enjoyable – I wouldn't do it again.

**31%** Yes



- 74%** It was worth all the precautions and safety measures – I would do it again.
- 24%** It was okay, but I don't see this as a viable option for most groups.
- 2%** Not at all enjoyable – I wouldn't do it again.

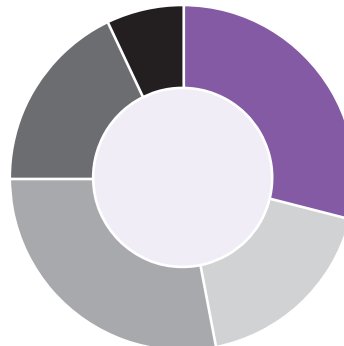
**83%** No

**69%** No

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?

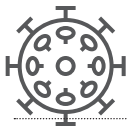


- 44%** I would not travel.
- 13%** Within a two-hour flight.
- 21%** Any distance necessary if the program was worth it.
- 18%** Within a four-hour drive.
- 5%** Within a five-hour flight.



- 29%** I would not travel.
- 18%** Within a two-hour flight.
- 27%** Any distance necessary if the program was worth it.
- 18%** Within a four-hour drive.
- 7%** Within a five-hour flight.





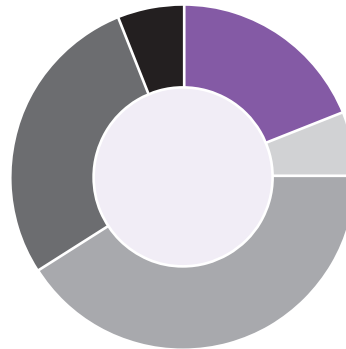
## PLANNER TRACK

## 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?



- 15% There will be pent-up demand for all groups to meet face-to-face.
- 17% People will be hesitant to travel to meet face-to-face.
- 35% Smaller local and regional events will thrive before national and international groups gather.
- 26% Small in-person events will be hybrid, with a digital version for a larger audience.
- 7% Other



- 19% There will be pent-up demand for all groups to meet face-to-face.
- 6% People will be hesitant to travel to meet face-to-face.
- 41% Smaller local and regional events will thrive before national and international groups gather.
- 28% Small in-person events will be hybrid, with a digital version for a larger audience.
- 6% Other



### PLANNERS SPEAK

*"I guess I feel that this is with us from here on out. Meaning that once a vaccine is developed, we'll still have to contend with people being vaccinated and society reaching herd immunity. So, people may be slow to come back to large group gatherings because they may still not feel safe. Also, virtual meetings have now demonstrated that we can obtain access to content without needing to travel. For those who didn't like to travel/had time restrictions around traveling, they're going to expect a virtual component. Also, some audiences' budgets have been frozen. When will that end? We may see reduced in-person attendance because of lack of funding for travel on the part of attendees. For some of us, I think we're going to have to [reimagine] our meeting model — that could mean moving to all virtual, having smaller in-person gatherings with larger online presences, smaller meetings we hold on a regional basis, etc. I think it will depend on the association and what their constituents demand."*

*"Our board has stated that they are nervous about hosting an event in Chicago given all of the unrest and would consider going somewhere else face-to-face in 2021."*

*"I believe digital and some form of hybrid is here to stay. We've learned that it's now a viable option and allows for greater access. In future, once the opportunity to gather becomes a reality again, digital will increase every event's footprint to those who want to attend any event but cannot be there in person."*

*"I think the industry is fooling itself and its clients to keep pushing reopening events any time during 2020 and first part of 2021 — and hybrid is not feasible. Budgets are being cut so now you are pushing adding live with venue costs and keeping the costs of virtual."*

*"It will all depend on the vaccine — once it is ready and people are able to get it, we can go back full speed with our in-person events."*

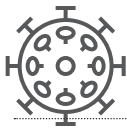
*"I think smaller and regional events will make a comeback before larger/national/international events. We fully expect most of our events to carry a hybrid solution going forward."*

### SUPPLIER PERSPECTIVE

*"Comfort levels for face-to-face meetings will depend upon science/health professionals' widely approved and widely available COVID vaccines."*

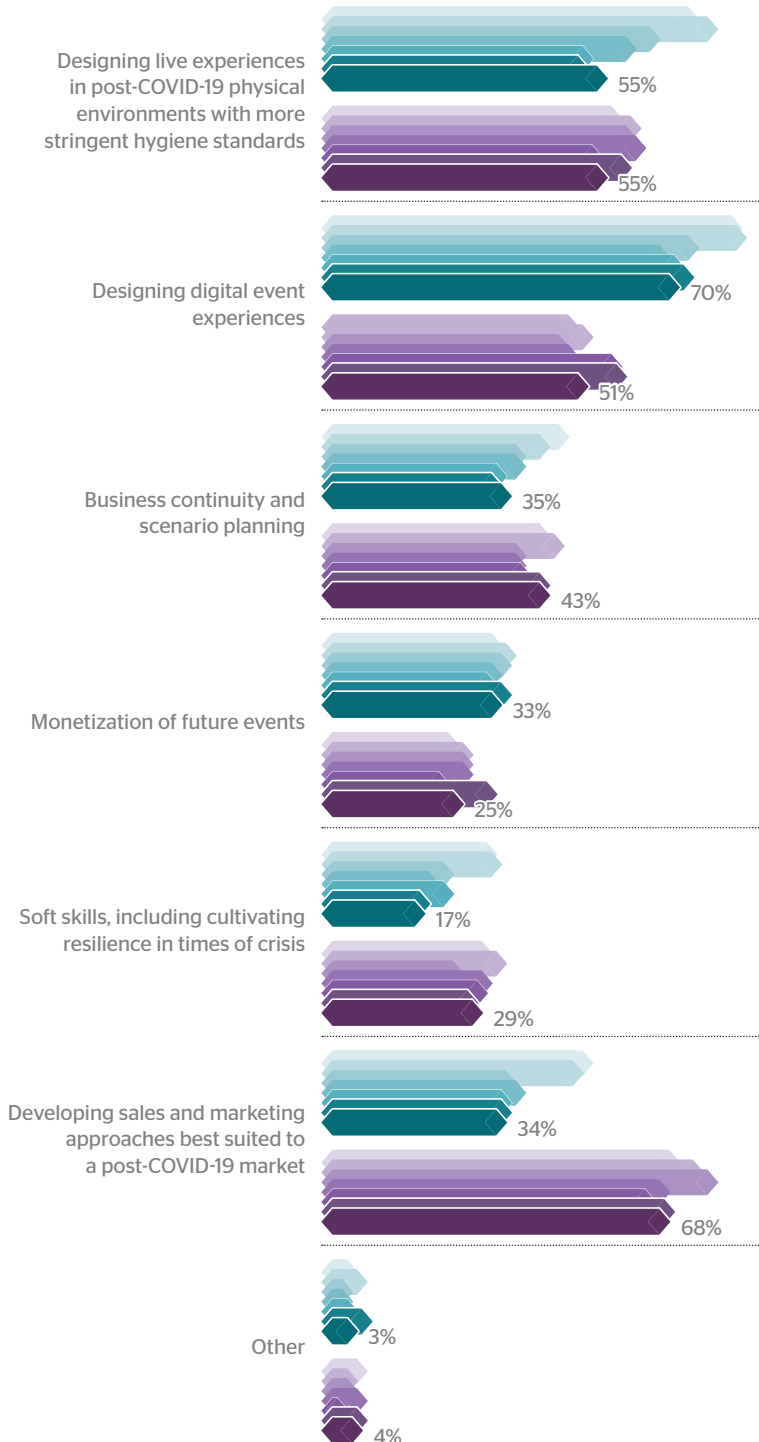
*"Depends on the business market segment and corporate leaders willing to step out and hold in-person meetings. Some industries are meeting and others are not. I'm seeing pent-up demand but also meetings that were several thousand [attendees] shrinking to hundreds. Every industry is facing this differently."*

*"Small, dispersed regionally for in-person events, with digital components — hub-and-spoke model."*



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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

*“How a live in-person event/meeting planner can become a producer of live virtual events – what we must know.”*

*“Designing hybrid events as we will continue to see lower international travel/participation.”*

*“Creating informational, engaging events that will attract and maintain attendees in a digital space.”*

*“Pricing strategies for live/digital attendance and also for sponsorships along with ROI for all.”*

### SUPPLIER PERSPECTIVE

*“We are looking to see if we can buy competitors or make new investments that can secure us a new position in the market.”*

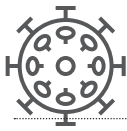
*“It is not about hygiene per first option above. It is about controlled access and everyone confirming their current health status prior to entry. If everyone is healthy, getting together poses minimal risk.”*

*“New business model as a vendor that only has services for in-person meetings. Need clients to come to table with shared risk.”*

*“Reimagine the sponsor/exhibitor experience.”*

*“Reduce overhead, expenses, and labor. Instead of offering all production services, narrow down to one thing really well.”*

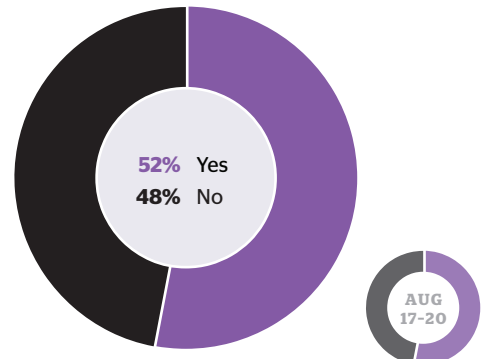
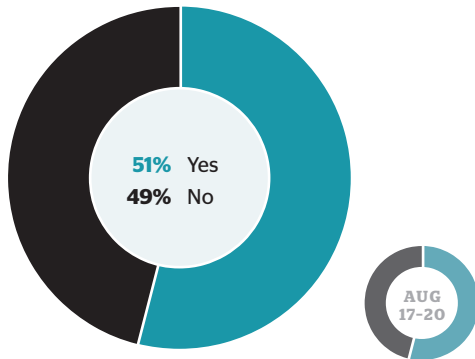
*“Assisting with community resilience.”*



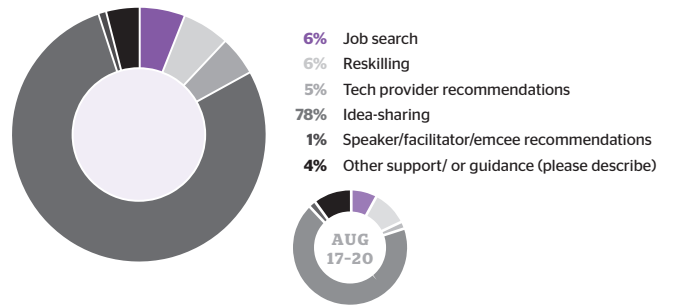
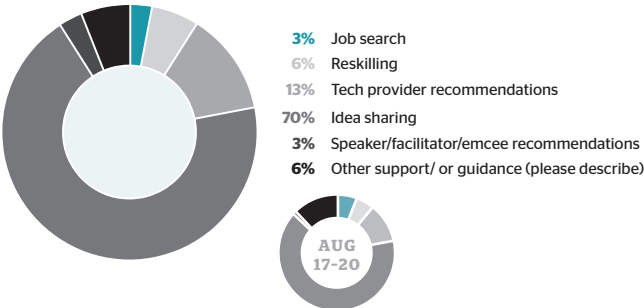
## PLANNER TRACK

## 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 SPEAK

*“All of the above ... specifically a job offer while upskilling in the DES course.”*

*“Both idea-sharing and tech recommendations amongst other things — timelines, schedules, what worked what didn’t, lessons learned.”*

### SUPPLIER PERSPECTIVE

*“Idea sharing. I live in California, a state that strongly follows CDC guidelines. I am interested in understanding what other states are doing.”*

*“Idea sharing, downsizing and/or re-structuring company.”*

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

Respondents named a variety of platforms, Zoom being most common, and professional discussion groups, as well as Microsoft Teams, ad-hoc groups formed in the DES class and CMP study group, and association member forums.

