

PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: MAY 17-20, 2021

COVID-19 Recovery Dashboard

Survey and analysis by PCMA Convene editors

Charts and design by Point Five

In a surprise move, just days before we invited the business events community to participate in our May COVID-19 Recovery Dashboard, the U.S. Centers for Disease Control and Prevention (CDC) recommended that fully vaccinated individuals no longer had to wear masks outdoors and indoors, except in hospitals, on public transit, and other specified places.

CDC's latest guidance, according to *Science News*, caught scientists off guard. While it "offered a glimmer of hope that the pandemic's end was inching closer," said the article's writers, "it has also caused confusion, anger, and worry," leaving even experts to wonder "what it meant for individuals and society as a whole."

Respondents to this month's survey — 232 planners and 143 suppliers — seemed to take the CDC's May 13 announcement as more of a positive than a cause for concern. Sixty-one percent of planners vs. 50 percent in the April Dashboard said they were feeling hopeful. That sense of optimism was even more pronounced among suppliers — 70 percent checked off the hopeful option compared to 51 percent last month, and 7 percent fewer supplier respondents said they were feeling anxious about the future (17 percent vs. 24 percent).

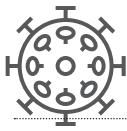
Respondents were not, however, of the mind that the CDC news would flip the "on" switch for large, in-person events. More than half of planners (55 percent) said that the new mask guidance has not made it easier for them to plan in-person events. Likely that's because the CDC guidance is not a federal mask mandate — that's determined by states and even by local businesses and private entities. Some states have lifted the mandate to wear masks on the heels of the CDC guidance and those changes are ongoing, so that adds more flux to the mix.

And while 28 percent of planners indicated that the

new guidance would make attending physical events more appealing and result in higher attendance, far more respondents (62 percent) said that it wouldn't necessarily translate to more on-site participants. Suppliers were more apt to believe that the new mask guidance would result in greater attendance with more than half (52 percent) choosing that option and only 40 percent expecting it wouldn't generate an increase.

Part of the confusion over the new mask guidance is that it doesn't take human behavior into account — it assumes that unvaccinated individuals will continue masking, even though people in the United States are not required to show proof of vaccination. As of May 20, only 38 percent of the total U.S. population was fully vaccinated. And our latest survey shows that planners and suppliers continue to be mostly against making proof of vaccination a requirement for attendance, with only a minority favoring that policy. By contrast, 67 percent of 184 event professionals doing business in the APAC region who participated in a recent PCMA survey said they would make vaccination a requirement.

"People," wrote one supplier, "will hesitate to travel to meet face to face until 1) more countries vaccinate their people; 2) we have concrete data on the length of time the vaccine is effective and whether a booster shot will be required; and 3) there is a universal vaccination certificate for proof of being fully vaccinated."



PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: MAY 17-20, 2021

But despite the in-person event proposition remaining a gray area, the May Dashboard results found fewer planners focusing their reskilling efforts on designing digital event experiences (50 percent vs. 62 percent last month) and fewer planning digital-only events (54 percent vs. 67 percent last month). Nearly half (48 percent) are planning an in-person/hybrid event in the fourth quarter of this year, compared to only 38 percent last month.

How these hybrid events will play out has become an even bigger question, however. The percentage of planners who said they are unable to estimate overall registration numbers for their events until they get closer to the scheduled date increased month over month — 37 percent versus 28 percent for hybrid events, and 40 percent versus 32 percent for in-person events. One planner described being “cautiously optimistic but realistic. Also, so sick of uncertainty.”

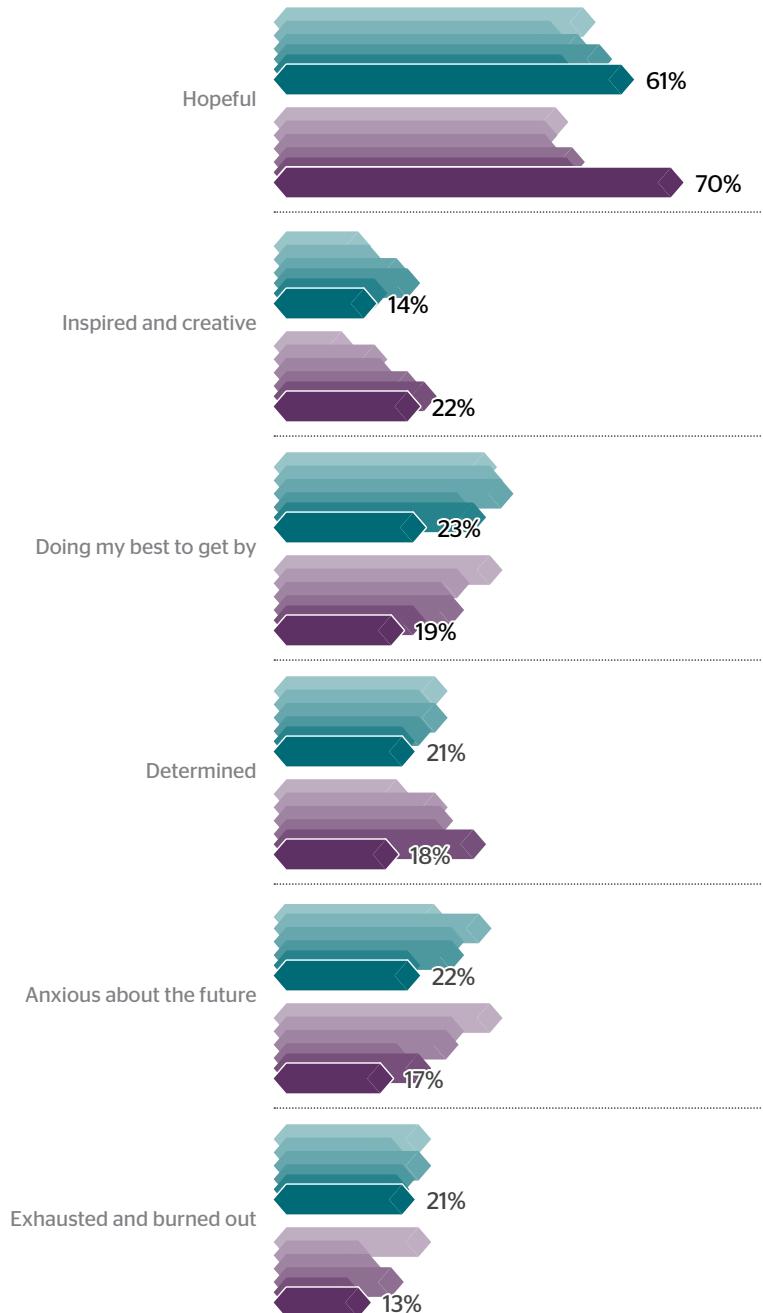
Meanwhile, the percentage of suppliers who see hybrid events as the most likely recovery scenario has shrunk by half: Only 9 percent in May compared to 18 percent in April. This comment comes from a supplier who is likely among that 9 percent: “Organizers will have to think differently about events, beyond hybrid into multichannel. Huge opportunity for those who experiment and put their attendees — and how they want to engage — at the center.”

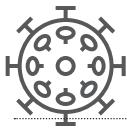
One human emotion that should not be discounted as we inch toward getting back to business is ambivalence. “As we move through the spring of The Great Vaccination,” according to a recent *New York Times* article, “many of us are feeling cautious optimism, and also its flip side: creeping dread.” For instance, if you used to work in an office, you may be eager to see people again, but worried about interactions at the same time. “There will be new forms of social anxiety” about gathering with others, Dacher Keltner, a professor of psychology and the director of the Social Interaction Lab at the University of California, Berkeley, told *The Times*.

This planner comment expressed some of that anxiety, but also captured how some changes forced by the pandemic have made for a better work/life balance and created a reluctance to go back to a hectic routine — a perspective that may be shared by event attendees as well. “[I’m] a little numb,” the planner wrote. “I love my work, however I got too used to being home, and do not want to go back to work five days a week in the office plus the travel demanded by my position. Something will need to give. ... Life is too short.”

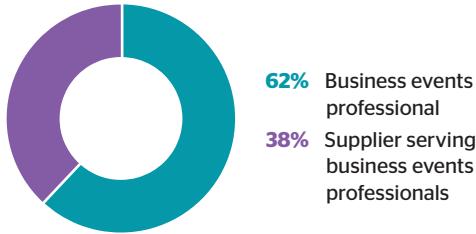


We appreciate your input in this survey. We'd like to check in with you first. What best describes how you're feeling right now? (Choose all that apply.)

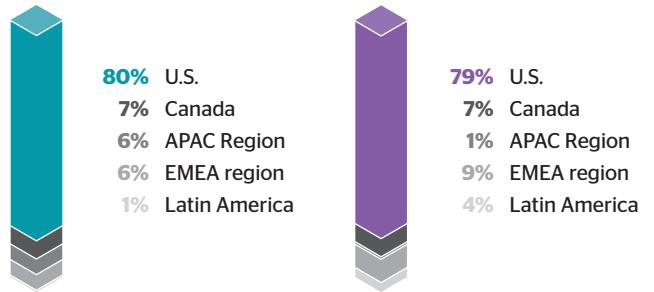




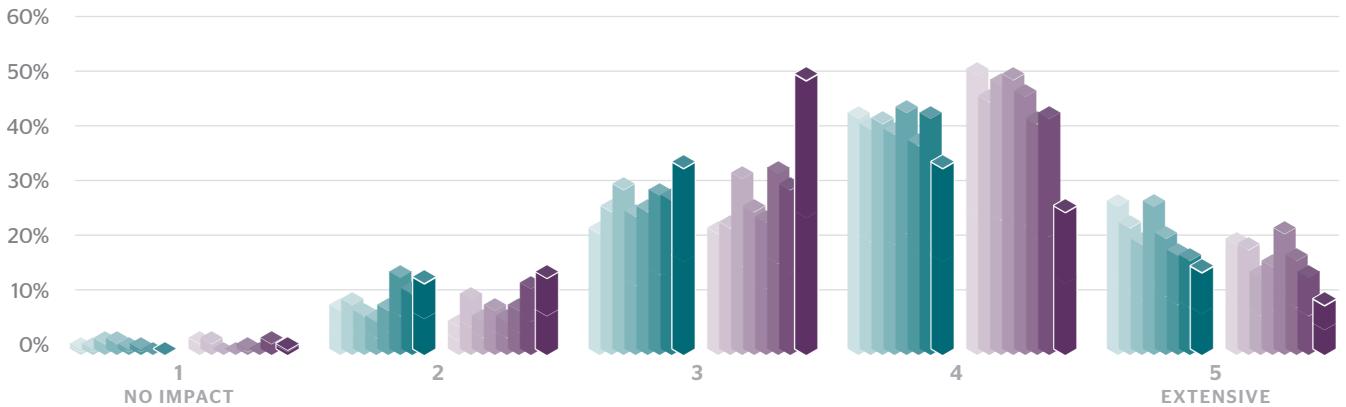
What best describes your role in the business events industry?



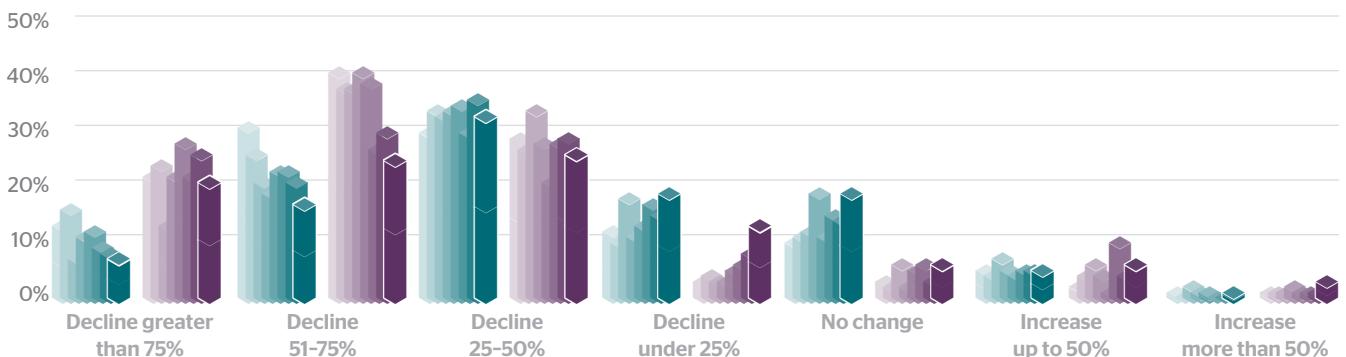
What region best represents where you do the majority of your business?

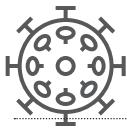


To what extent do you believe the rise in the use of digital-event technology will impact face-to-face event attendance at your event/s in 2021 on a scale of 1 to 5, with 1 being no impact and 5 being extensively?



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

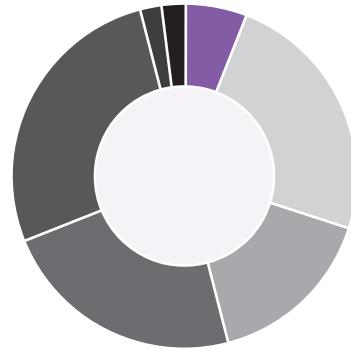
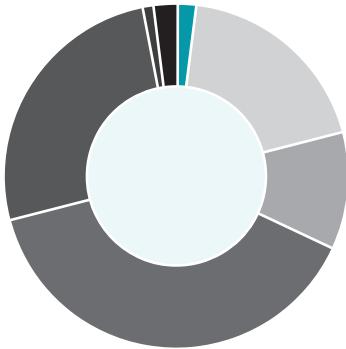




PLANNER TRACK

SUPPLIER TRACK

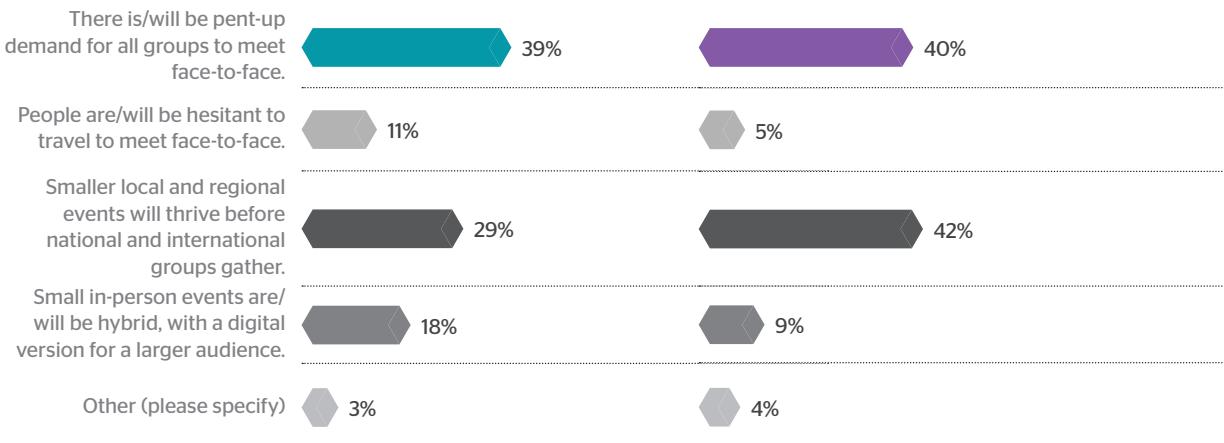
What do you think the surge in leisure travel over the coming months means for face-to-face event attendance?

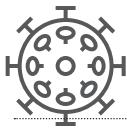


- 2%** People will travel to attend regional and domestic events Q2.
- 19%** People will travel to attend regional and domestic events Q3.
- 11%** People will travel to attend regional and domestic events Q4.
- 39%** There may be pent-up demand for F2F events, but budget cuts, the economy, and/or job insecurity will limit attendance
- 26%** There may be pent-up demand for F2F events, but until there is herd immunity, organizations will avoid assuming business travel risk.
- 1%** No change – attendees have grown accustomed to digital events and will participate virtually.
- 2%** Other

- 6%** People will travel to attend regional and domestic events Q2.
- 24%** People will travel to attend regional and domestic events Q3.
- 16%** People will travel to attend regional and domestic events Q4.
- 23%** There may be pent-up demand for F2F events, but budget cuts, the economy, and/or job insecurity will limit attendance
- 27%** There may be pent-up demand for F2F events, but until there is herd immunity, organizations will avoid assuming business travel risk.
- 2%** No change – attendees have grown accustomed to digital events and will participate virtually.
- 2%** Other

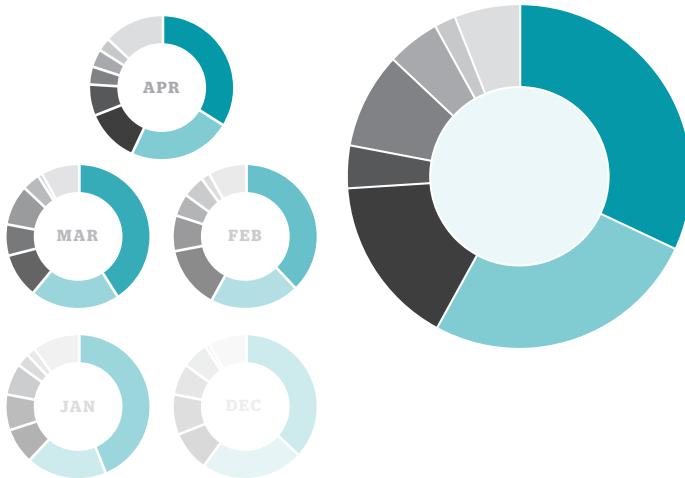
What scenario do you think best describes the recovery of face-to-face meetings for the business events industry, according to the industry or field you represent?





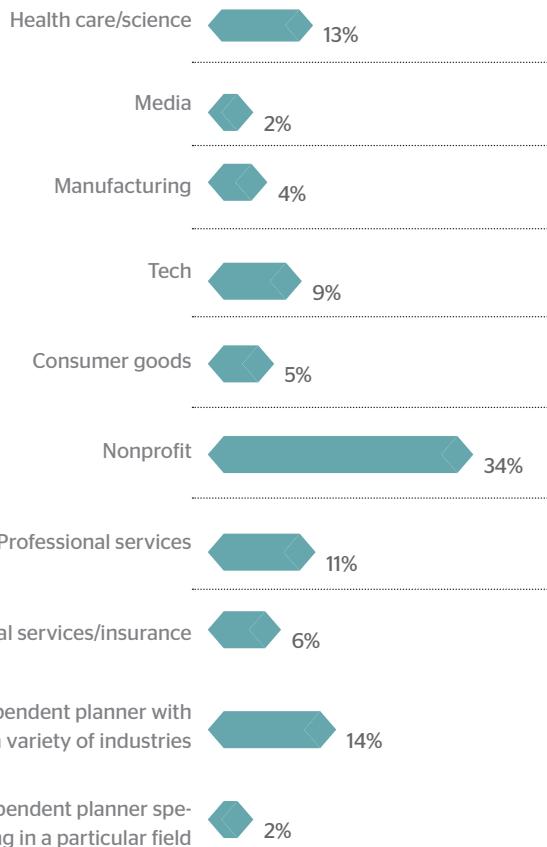
PLANNER TRACK

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

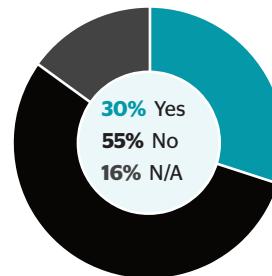


- 32%** Budgeting/pricing for a hybrid (in-person + digital) events
- 26%** How to budget in terms of face-to-face attendance expectations
- 16%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 4%** What to charge digital participants
- 9%** What to charge digital 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
- 6%** Other

What best describes the industry you represent?

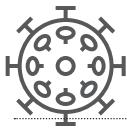


Has the latest CDC guidance allowing vaccinated people to not wear masks outdoors and in uncrowded indoor spaces made it easier for you to plan in-person events?



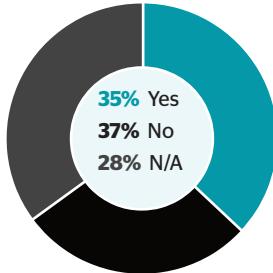
What type of event are you planning in 2021?
(Choose all the apply.)



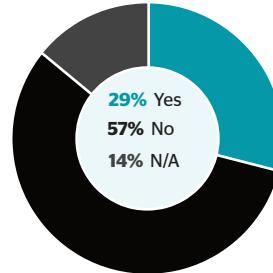


PLANNER TRACK

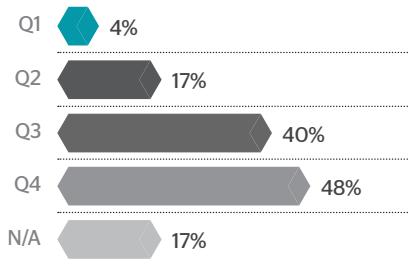
Are you planning to do networking differently to encourage interaction at your in-person or hybrid event(s)?



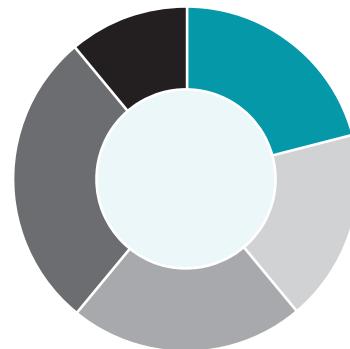
Are you seeking out broadcasting facilities in your site-selection efforts for future hybrid events?



What is the anticipated date of your in-person or hybrid event planned for 2021?

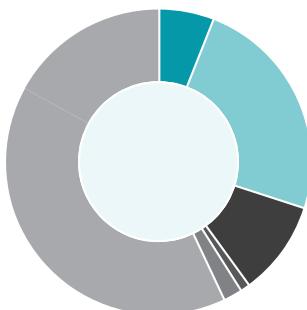


What is your planning window for in-person events in 2021?

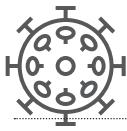


- 21%** We are making a go/no-go decision within four months of event date.
- 18%** We are making a go/no-go decision within three months of event date.
- 22%** We are making a go/no-go decision within two months of event date.
- 28%** N/A
- 12%** Other

What kind of overall registration numbers are you expecting for your planned 2021 in-person only event vs. 2019 (or pre-pandemic 2020)?

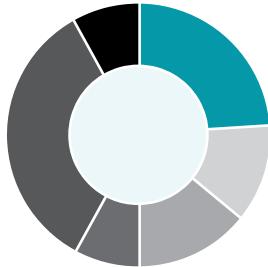


- 6%** Decline greater than 50%
- 24%** Decline up to 50%
- 10%** Same
- 1%** Increase up to 50%
- 2%** Increase of more than 50%
- 40%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment



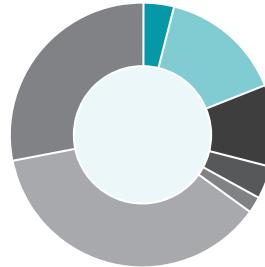
PLANNER TRACK

If you are planning a hybrid event, how do you foresee it taking shape?



- 24%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, with ability for both audiences to interact via the event platform
- 12%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, without ability for both audiences to interact via the event platform
- 14%** Simultaneous, small in-person event with streaming video for virtual audience; no separate online content for digital participants
- 8%** Hub-and-spoke model: small regional in-person events held simultaneously with separate content for digital audience
- 34%** N/A
- 8%** Other

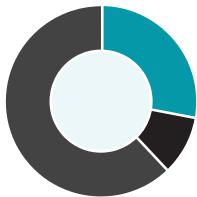
What kind of overall registration numbers are you expecting for your 2021 hybrid event vs. 2019 (or pre-pandemic 2020)?



- 4%** Decline greater than 50%
- 15%** Decline up to 50%
- 10%** Same
- 4%** Increase up to 50%
- 2%** Increase of more than 50%
- 37%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 29%** N/A

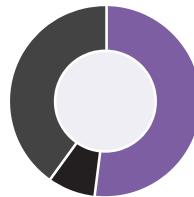
PLANNER TRACK

Do you think the new guidance about mask-wearing will make attending in-person events more appealing and result in higher attendance?



- 28%** Yes
- 10%** No
- 62%** Yes, perhaps in-person events will be more appealing but it won't translate to higher attendance.

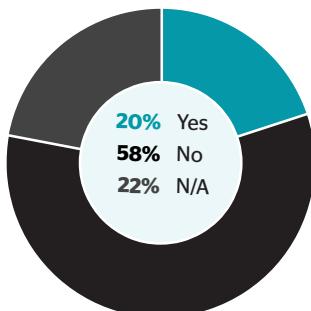
SUPPLIER TRACK



- 52%** Yes
- 8%** No
- 40%** Yes, perhaps in-person events will be more appealing but it won't translate to higher attendance.

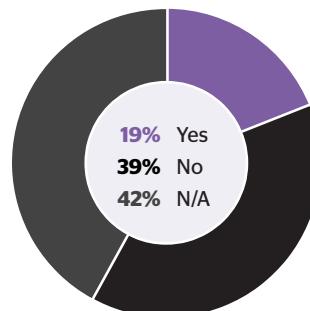
PLANNER TRACK

Now that the vaccine is widely available, will you require attendees, staff, and visitors to show proof of vaccination in order to participate in your physical events?

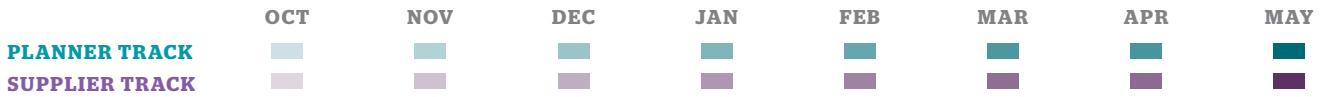
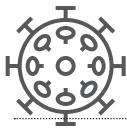


- 20%** Yes
- 58%** No
- 22%** N/A

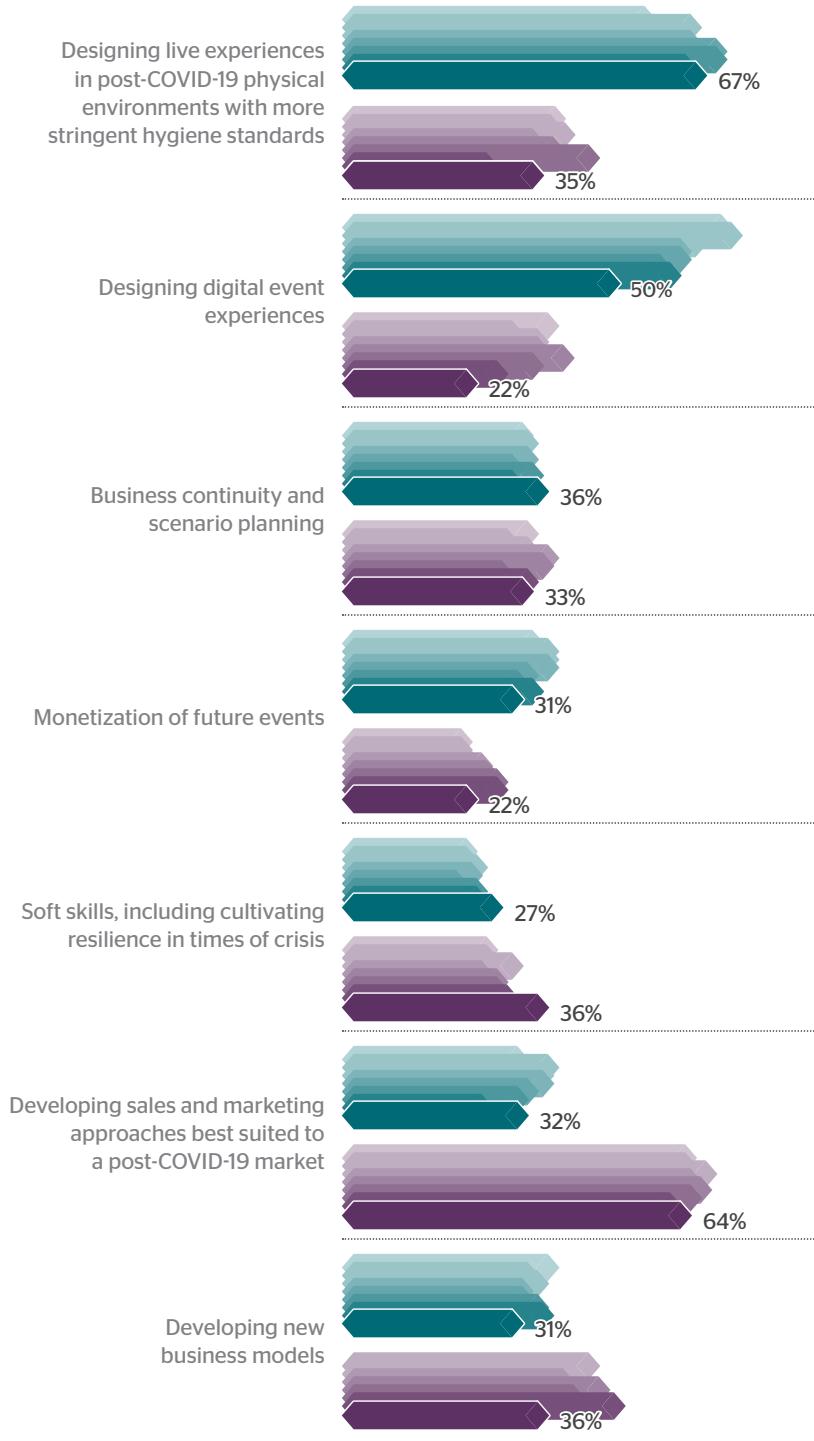
SUPPLIER TRACK



- 19%** Yes
- 39%** No
- 42%** N/A



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? (Choose all that apply.)



PLANNERS SPEAK

"Integration of race, diversity, equity, and inclusion into event design, contracts, and best practices for registration (i.e. inclusive restrooms, closed captions, hotel ability/mobility access points)."

"Designing live events with virtual components that keep both class of attendees engaged and fulfilled."

"Designing hybrid experiences."

"Building skills outside the industry."

SUPPLIER PERSPECTIVE

"Planning and designing for hybrid experiences."

"I do not think I will need to develop new skills."

"Too old to learn new tricks, but can't retire. I don't know."