

PCMA CONVENE

APAC COVID-19 SURVEY

SURVEY DATES: 13-26 APRIL

APAC COVID-19 Survey

Survey analysis by Michelle Russell

Charts and design by Point Five

The positive outweighed the negative in the most-recent PCMA APAC Dashboard Survey — at least when it came to how 184 planner and supplier respondents said they were feeling. One-third said their mood was hopeful, 16 percent are feeling inspired and creative, and 15 percent said they were determined, sort of a middle ground. A collective 36 percent expressed a less positive outlook, saying they were doing their best to get by, anxious about the future, or exhausted and burned out.

Respondents to the survey, conducted 13-26 April, were both business event professionals (66 percent) and suppliers (34 percent), who do the majority of their business in Australia and New Zealand (38 percent), followed by Southeast Asia (36 percent). The largest percentage work in professional services (32 percent), followed by independent planners and agencies representing clients in a variety of industries (27 percent).

Around half of respondents (52 percent) said they are focusing their reskilling efforts on designing live experiences in post-COVID-19 physical environments, slightly down from 55 percent of respondents who identified this as an important new skill in a PCMA APAC survey conducted last July. And only 57 percent of respondents said that they are focused on designing digital event experiences, compared to 74 percent of planner respondents to the 2020 survey.

A possible interpretation of this data point may be that respondents to the recent survey have become more proficient in digital event design in the nine months between the two surveys, and/or they are focusing more of their efforts on convening small face-to-face events safely.

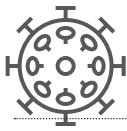
In fact, 82 percent of respondents were planning an in-person event this year, with the largest contingent (44 percent) scheduling events for Q4 2021.

They do expect their in-person events, however, to look very different than in pre-COVID times. Sixty percent estimate that the rise in the use of digital-event technology will have a high or extensive impact on face-to-face attendance at 2021 events, slightly higher than predictions in last year's survey — slightly more than half of planners said they anticipated a high or extensive impact this year. Looking ahead to 2022, only 39 percent foresee a high or extensive impact on attendance, with the

In-Person Events Return

Recent physical events are cause for optimism, including the Victorian Tourism Conference, held 21-22 April at the Melbourne Convention and Exhibition Centre, which attracted 900 in-person delegates, and the 11-day Indonesia International Motor Show Hybrid 2021, held at Jakarta International Expo, beginning on 15 April. The auto show has previously attracted 20,000-50,000 visitors, and the 2021 version was capped, by local regulations, to 25 percent of normal capacity or up to 5,000 visitors a day. Another auto show, Auto Shanghai, was held 19-28 April at the Shanghai National Exhibition and Convention Center, attracting 810,000 visitors and about 1,000 international car manufacturers, suppliers, and technology companies.

In addition, plans are moving forward for IBTM World to be held in person in Barcelona in December and IMEX America in Las Vegas 9-11 November. Carina Bauer, CEO of the IMEX Group, told *TTGmice*, "The vaccine programme is a major determining factor as it builds confidence in the ability to travel and meet in person. We're confident the programme will have significantly progressed by the time IMEX America takes place in November."



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largest percentage (44 percent) planning their 2022 events for the first quarter.

And while only 15 percent of respondents described their mood as determined, pulling off their events with anticipated quick turnarounds will certainly require grit: More than one-third said they are making the go/no go decision on planning an in-person event within two months of the event date, the shortest window offered among the survey options.

That the post-COVID-19 environment remains fluid and uncertain is also backed up by respondents' estimates for in-person registration numbers: Nearly one-third say they were unable to estimate until they got closer to the event date. Of those hazarding a guess, 46 percent expected declines of up to 50 percent or more in attendance for their 2021 in-person event vs. the same event held in pre-pandemic times. The largest percentage — 46 percent — do not anticipate any overseas delegates attending these events. Indeed, government officials confirmed in mid-May that Australia will remain closed to the rest of the world until mid-2022.

The most popular scenario for the recovery of face-to-face meetings, chosen by 36 percent of respondents, is that smaller local and regional events will thrive before national and international groups gather.

The thinking that global events will take longer to return in the APAC region was confirmed by recent news (announced after the survey had concluded) that World Economic Forum (WEF) organisers canceled a special annual meeting, scheduled for Aug. 17-20 in Singapore. "Regretfully, the tragic circumstances unfolding across geographies, an uncertain travel outlook, differing speeds of vaccination roll-out, and the uncertainty around

How They're Different

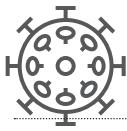
The APAC survey asked similar questions to the largely North American monthly PCMA *Convene* Dashboard survey — but there were marked differences in responses between the two markets, reflecting cultural norms and geographic realities.

For example, in the Dashboard conducted in North America over a similar time period (19-22 April), 400 suppliers and planners were far less apt to require attendees to show proof of vaccination in order to participate in their events — only 20 percent of planners and 32 percent of suppliers. A nearly inverse proportion of APAC respondents said they would require vaccination proof — 67 percent. This may be due to privacy concerns when it comes to health records being more prevalent in the U.S.

The two markets are also taking different hybrid event approaches, with 17 percent of North American planners — compared to 38 percent of their APAC counterparts — planning simultaneous, small in-person events with streaming video for a virtual audience and no separate online content for digital participants. Only 5 percent of North American survey participants have hub-and-spoke models planned compared to 18 percent of APAC respondents. And only 27 percent of North American planners are giving the in-person and virtual audiences opportunities to interact. Of the APAC respondents planning a hybrid 2021 event, nearly 80 percent said the two audiences would be able to interact via the digital platform.

Additionally, only one-quarter of North American Dashboard respondents are seeking out broadcasting facilities in their site-selection efforts compared to 69 percent of APAC respondents.

The two groups of respondents are in sync in terms of what they think will limit attendance at face-to-face events, despite a pent-up desire to travel to events: The largest percentage in both groups cite risk as the biggest mitigating factor. Until there is herd immunity, it seems universally agreed upon, organizations will avoid assuming business travel risk — an even larger consideration than budget cuts and economic hardship.



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new variants combine to make it impossible to realise a global meeting with business, government, and civil society leaders from all of the world at the scale which was planned,” WEF said in the 17 May announcement.

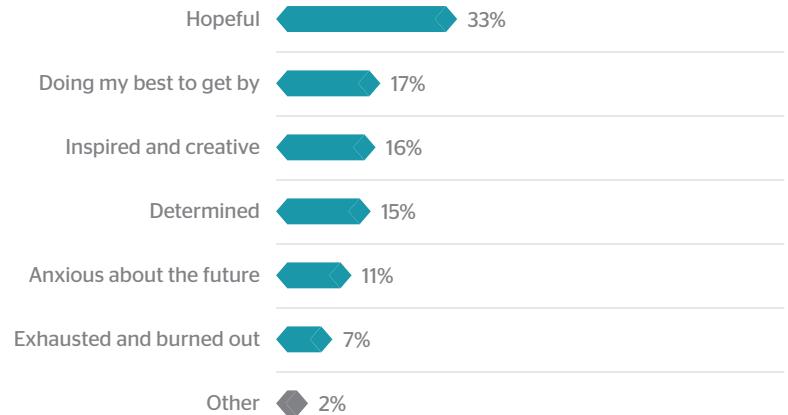
While 30 percent of participants expect that people will travel to regional and domestic events in the third and fourth quarter of this year, 28 percent acknowledged that despite a pent-up demand for in-person events, organisations will avoid assuming risks associated with business travel, and 23 percent cited budget cuts, the economy, and job insecurity as playing a key role in limiting attendance.

Respondents are pursuing several different models of hybrid events – they are almost evenly split between holding a simultaneous in-person event with streaming video and a separate online program for a virtual audience (37 percent) and the same offering but without separate online content for digital participants (38 percent). The vast majority (79 percent) see interaction between the in-person and digital audiences as an important aspect of a hybrid event.

That event professionals are pursuing a hybrid approach to their events is also evidenced by the fact that nearly 70 percent of survey participants are making broadcasting facilities a criterion for future events in their site-selection process, with 74 percent prioritising broadcast quality virtual event and studio spaces and 68 percent looking for facility staff with experience in running digital events. Of course, costs are a deciding factor as well, cited by 70 percent of respondents.

Finally, events professionals’ resourcefulness comes through in their responses to the question, How has your event/s business model changed? In almost equal percentages, survey

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?

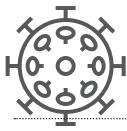


respondents said they had become less reliant on face-to-face event registrations and/or sponsors (49 percent) and had changed the frequency of their events (48 percent). Thirty percent have adopted a hub-and-spoke model with regional gatherings and a virtual audience and 31 percent have found ways to monetise the digital audience by becoming more data driven.

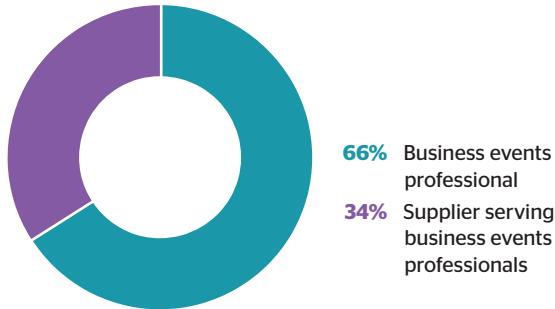
Some responses in the open-ended comments section to this question reveal initiatives that are less about changes to the business model and more about demonstrating flexibility, like “cross skilling of sales staff to be able to work with whichever markets are active through recovery,” or belt-tightening – reducing fixed overhead costs, such as staff and office space.

Michelle Russell is PCMA Convene’s editor in chief.

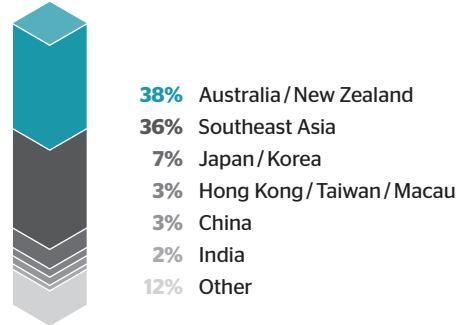
“Overwhelmed. So much work, not quite the same \$\$.”



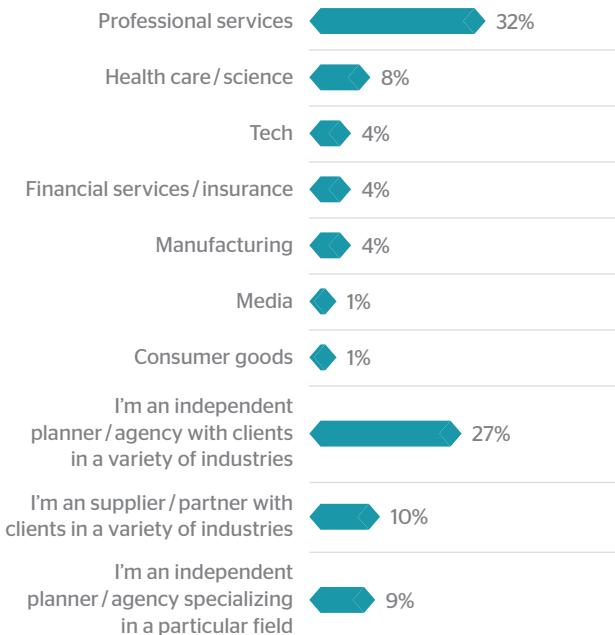
What best describes your role in the business events industry?



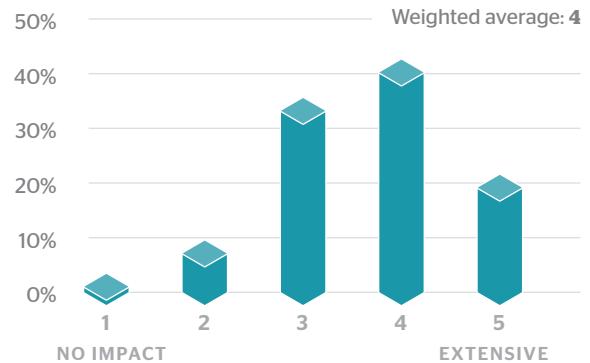
What region best represents where you do the majority of your business?



What best describes the industry you represent?



To what extent do you believe the rise in the use of digital-event technology will impact in-person attendance at your event/s **in 2021** on a scale of 1 to 5?

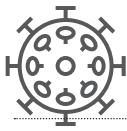


To what extent do you believe the rise in the use of digital-event technology will impact in-person attendance at your event/s **in 2022** on a scale of 1 to 5?

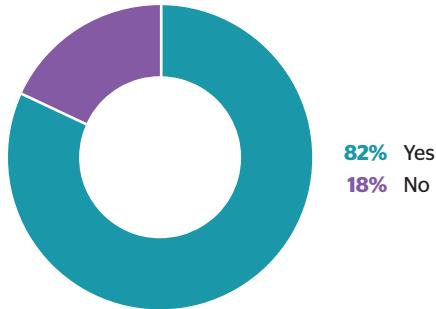


81%

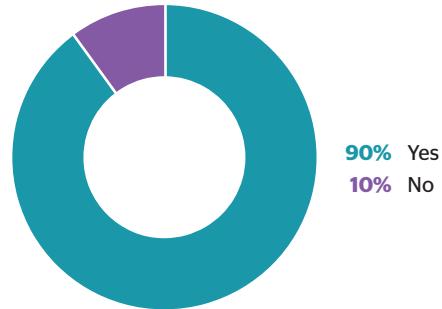
BELIEVE THE RISE IN THE USE OF DIGITAL-EVENT TECHNOLOGY WILL HAVE A MEDIUM TO EXTENSIVE IMPACT ON IN-PERSON ATTENDANCE IN 2022.



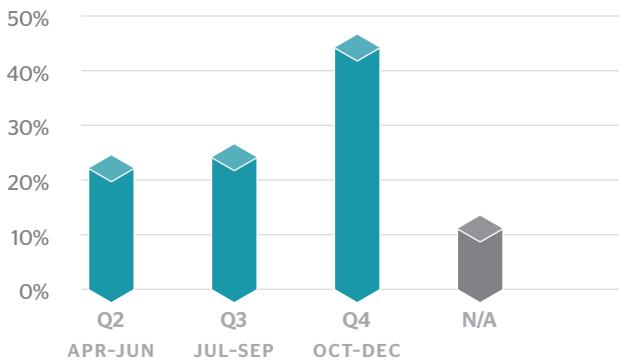
Are you/your client planning an in-person event **in 2021**?



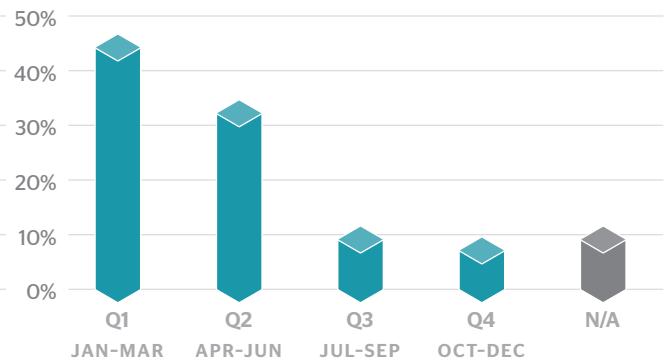
Are you/your client planning an in-person event **in 2022**?



What is the anticipated date of you/your client's in-person event planned **for 2021**?

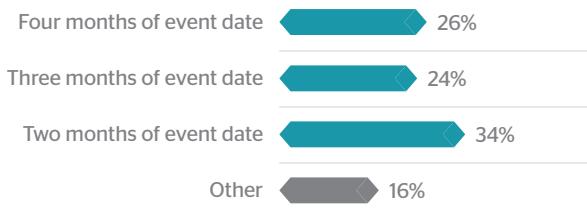


What is the anticipated date of you/your client's in-person event planned **for 2022**?



What is your /your client's planning window for in-person events **in 2021**?

We are making a go / no-go decision within ...

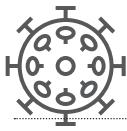


What scenario best describes the recovery?

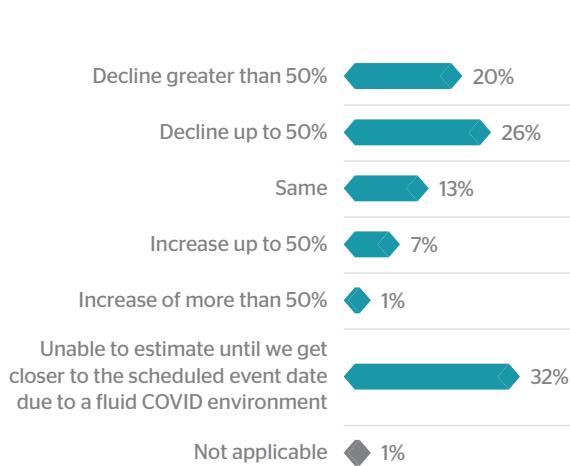
"Face to face will be back, with caution. Protocols will be observed. There will be lesser participation and visitors in attendance at the initial part of the event opening/re-opening."

"Rise of digital-first technology for all events."

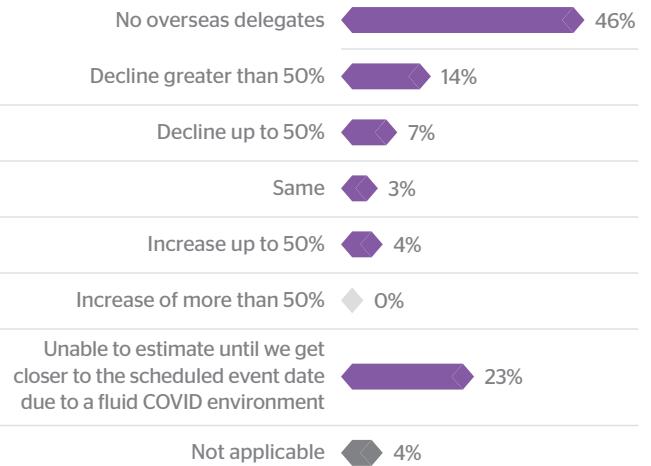
"COVID related protocol for those returning home after the event will impact attendance."



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



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



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?

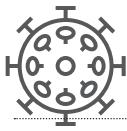


- 36%** Smaller local and regional events will thrive before national and international groups gather
- 26%** There is/will be pent-up demand for all groups to meet face-to-face
- 20%** Small in-person events are/will be hybrid, with a digital version for a larger audience
- 14%** People are/will be hesitant to travel to meet face-to-face
- 4%** Other

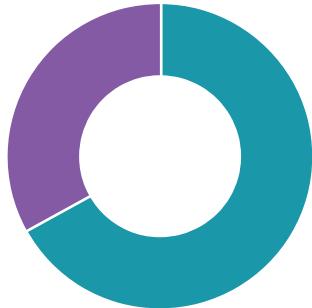
There has been a lot of press recently about the expected leisure travel surge in the coming months. What do you think this means for face-to-face event attendance?



- 6%** People will travel to attend regional and domestic events Q2 2021
- 20%** People will travel to attend regional and domestic events Q3 2021
- 10%** People will travel to attend regional and domestic events Q4 2021
- 8%** People will travel to attend regional and domestic events Q1 2022
- 23%** There may be pent-up demand for F2F events, but budget cuts, the economy, and/or job insecurity will limit attendance
- 28%** There may be pent-up demand for F2F events, but until there is herd immunity, organizations will avoid assuming business travel risk
- 4%** No change – attendees have grown accustomed to digital events and will participate virtually
- 2%** Other

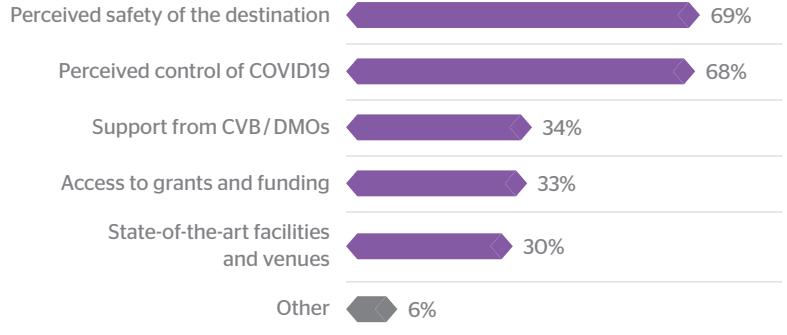


Once the vaccine is widely available, will you require your staff and visitors to show proof of vaccination in order to gain access at physical events?

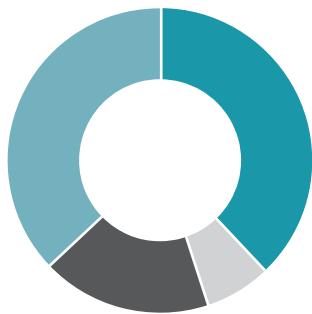


67% Yes
33% No

What are key priorities for planners when selecting site / destinations for future events?



If you / your client are planning a hybrid event in 2021, how do you foresee it taking shape?



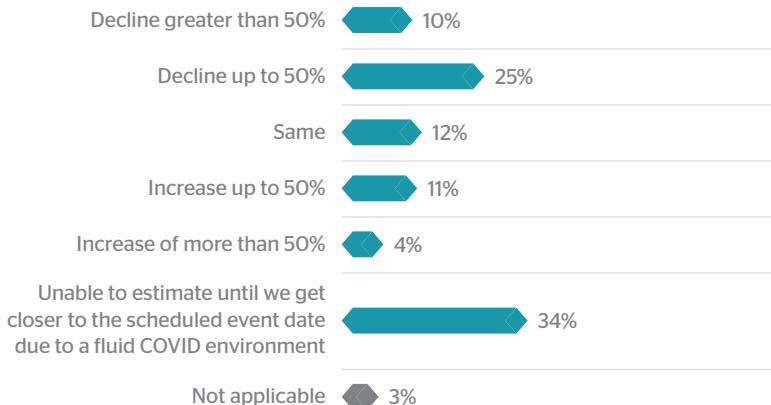
38% Simultaneous, in-person event with streaming video for virtual audience; no separate online content for digital participants

37% Simultaneous, in-person event with streaming video and separate online program for virtual audience

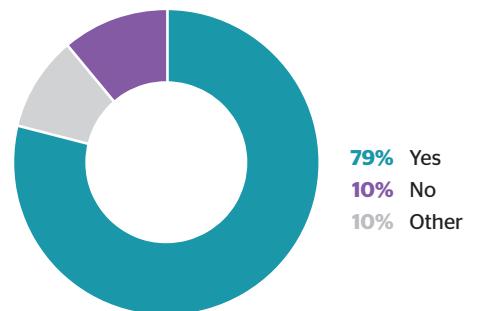
18% Hub-and-spoke model: regional in-person events held simultaneously with separate content for digital audience

7% Other

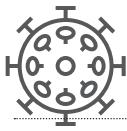
If you / your client are planning a hybrid event in 2021, what kind of overall registration numbers are you expecting vs. 2019 (or pre-pandemic 2020)?



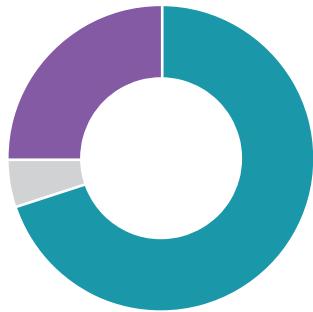
If you / your client are planning a hybrid event in 2021, do you plan to have both face-to-face and virtual audiences interact via the event platform?



79% Yes
10% No
10% Other

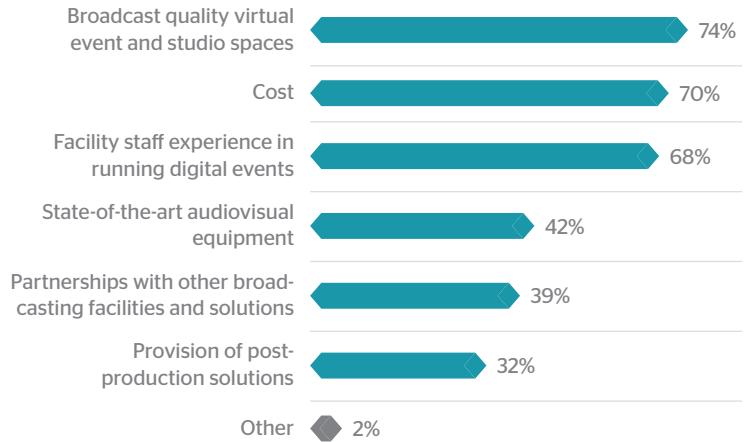


Are you seeking out broadcasting facilities in your site-selection efforts for future hybrid events?

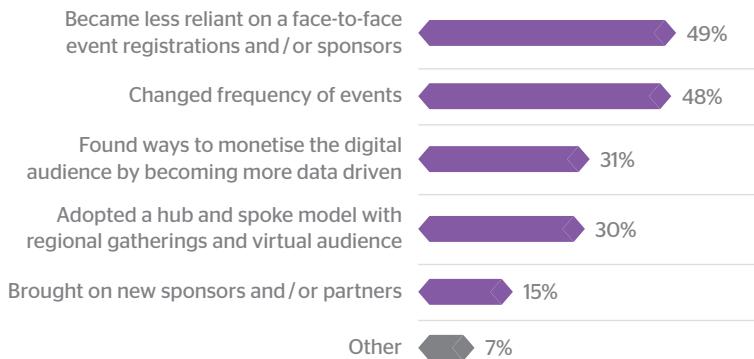


69% Yes
 25% No
 5% Not applicable

If yes, what are your key priorities when selecting broadcasting facilities?



How has your event/s business model changed?



Please comment on any additional changes you have made to your business model.

“Adapted to online events, but found it hard to monetise.”

“In a rush to develop niche approach to virtual events as everyone is selling the same thing but with different pricing models.”

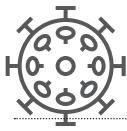
“Changed our content distribution strategy that will have a lasting effect, with many content events remaining virtual into and beyond 2022.”

“Our business model will predominately still rely on face-to-face meetings. China is already operating on this model. We await the rest of the world to catch up.”

“We moved to a global operating model during COVID and now that we see business returning, are moving to a more regional one again. The benefits of going global have been tremendous but are not sustainable.”

“Cross-skilling of sales staff to be able to work with whichever markets are active through recovery.”

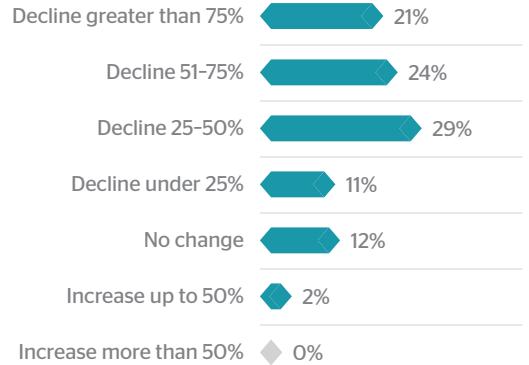
“Our site-selection process has changed greatly for hotels. Air circulation, access to hand-washing sinks, access to outdoor space from meeting facility, air vent cleaning schedules, destruction of dreaded COVID drool on hotel soft goods.”



What are you / your client's biggest financial challenges with regard to planning a business event in 2021?
(Please rank from 1 to 7 with 1 being the biggest challenge.)



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



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?



‘Our business model pivoted from in-person to creating a fully hosted online events platform for Asia, which we have combined with broadcast production facilities. These are now being further blended with regional in-person venues to offer a truly hybrid end-to-end service that can be subscribed to – events-as-a-service, if you like.’