

COVID-19 Recovery Dashboard

Survey and analysis by PCMA *Convene* editors

Charts and design by Point Five

Who needs proof that the Delta variant has put a kink in the recovery of the business events industry? There may not be any hands in the air, but *Convene's* latest Dashboard — which drew 451 planner and 173 supplier participants from Aug. 11-17 — offers just that.

In mid-June, nearly seven out of 10 planners said they were feeling hopeful. By mid-August, the percentage of planners and suppliers who checked off “hopeful” had dropped by more than half: down to 27 percent vs. 69 percent of planners and 31 percent compared to 64 percent of suppliers in June.

The spike in the number of new COVID-19 cases reported daily between the two months — 8,197 in the U.S. and 372,472 worldwide on June 15 vs. 181,433 in the U.S. and 535,797 around the world on Aug. 16 — not only dashed the industry's hopes just as face-to-face events were starting up again, it caused anxiety levels to climb. According to responses to the survey's question about how planners and suppliers were feeling, the most-popular option was “anxious about the future,” checked off by 47 percent of planners and 42 percent of suppliers. In June, only around one out of five planner and supplier respondents reported feeling anxious.

After nearly 18 months of riding the COVID roller-coaster, more than one-third of planners and suppliers were gritting their teeth, saying they were doing their best to get by. And nearly two planners and three suppliers out of 10 were showing grit, clicking on the “determined” option.

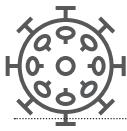
That determination may be channeled into designing physical events during a more challenging COVID environment: 59 percent of planners and 33 percent of suppliers said they were focusing their reskilling efforts on designing in-person experiences in August vs. 50

percent and 21 percent, respectively, in June. Meanwhile, more planners — 54 percent vs. 39 percent in June — were turning their attention to designing digital event experiences, perhaps recognizing it as their best option for engaging their stakeholders. And the percentage of planners honing their business continuity and scenario-planning skills rose from 38 percent in June to nearly half of all planner respondents.

Only around a quarter of planners said the Delta variant has not changed their plans for their events in the upcoming months: 12 percent are moving forward with their in-person — and 14 percent are proceeding with their hybrid — events. On the other hand, 14 percent have canceled their in-person events, with 11 percent moving them to digital-only versions. The highest percentage of planners — two out of five — said that they are taking a wait-and-see approach.

The rise in new COVID cases since our last Dashboard survey also prompted the CDC to reverse its earlier recommendation that only unvaccinated individuals wear masks indoors. We asked planners and suppliers if they thought the revised everyone-wear-a-mask-regardless-of-vaccination-status advice (which is now mandated in cities around the U.S.) would make participants less likely to attend events in person. Sixty percent of planners and 57 percent of suppliers said yes, they thought it would be a deterrent.

Despite the increased risk of transmission, only a slightly higher percentage of planners — 28 percent



vs. 22 percent in June — will make proof of vaccination a requirement to attend in-person events. And, surprisingly, fewer suppliers (25 percent compared to 30 percent in June) indicated that they will require proof of vaccination.

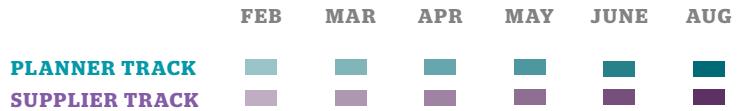
After a-year-and-a-half of navigating the crisis, we asked respondents to take stock of their roles with a new question: How has the pandemic changed the nature of their work? Not surprisingly, 63 percent of planners and 54 percent of suppliers said it has changed almost everything about their jobs.

Recognizing that “hybrid” is a buzzword for events as well as the workplace, we asked another new question this time around: If you work in an office, are you back full-time, part-time, or not at all? The most common response among planners (37 percent) is that they are still fully remote but planning to go back to the office at least part of the week in the future. Forty-two percent of suppliers are either back in the office full- or part-time.

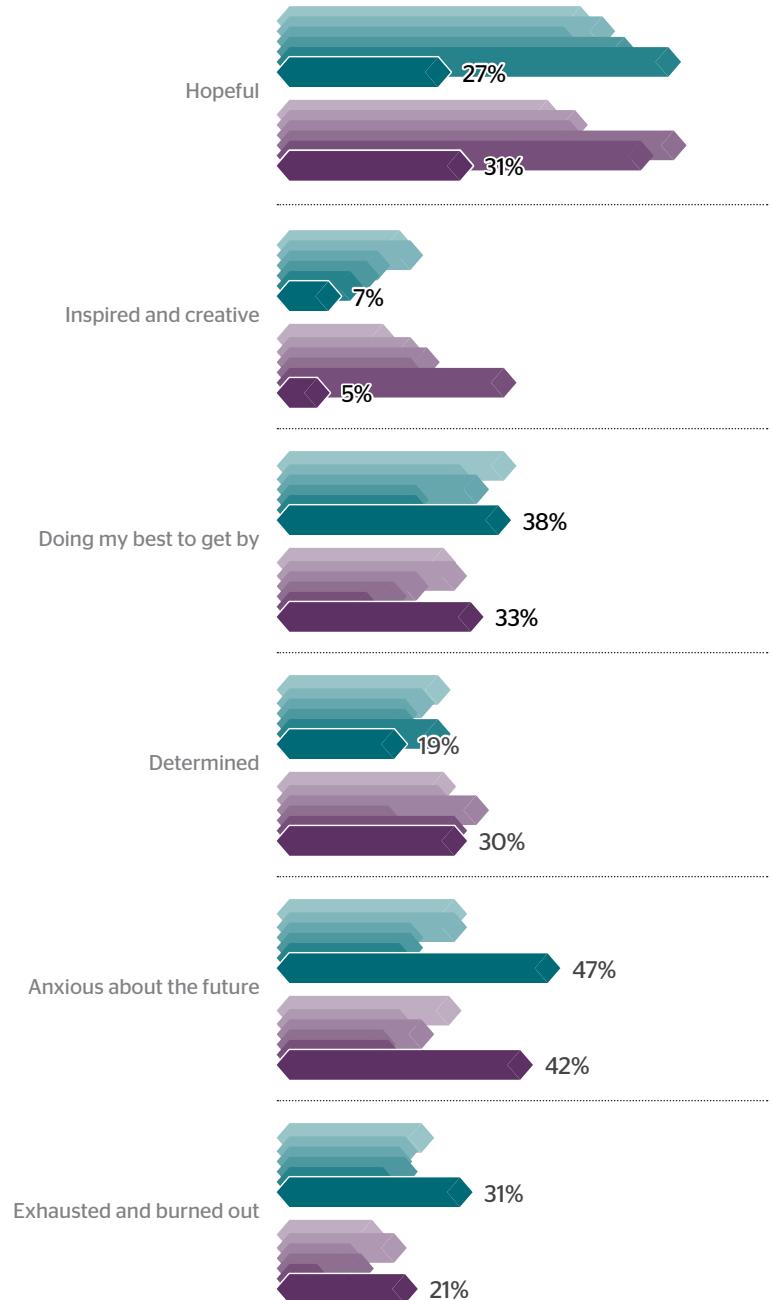
In their open-ended answers, respondents voiced everything from frustration “that we can’t get the pandemic under control” to feeling “resentful that some people won’t be vaccinated” to resilience during this latest bump in the road to recovery. One supplier questioned whether there may ever be a “post-COVID era,” saying we should instead “focus on a more sustainable approach, taking into account that viruses will remain a part of life.”

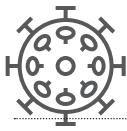
For this planner, COVID has created unsustainable expectations, sharing the need to get their organization out of working on “condensed timelines.” When COVID hit, this planner noted, “it was necessary to be nimble and flexible, knowing key decisions on go/no-go couldn’t be made until close to the event. However, it has now become an expectation that events can be put on with very little runway to plan. My team is burnt out from running at fire-drill pace trying to meet unrealistic expectations from senior leadership.”

Another planner had more of a positive take on the tumult of the past year, expecting the one to come to “again be another year of learning. Last year it was all virtual, now we add another layer of complexity: hybrid, which is new. This is exciting and scary at the same time!”

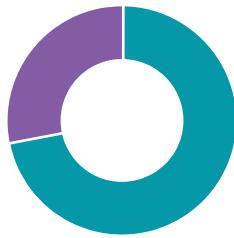


We appreciate your input in this survey. We'd like to check in with you first. What best describes how you're feeling right now? (Choose all that apply.)





What best describes your role in the business events industry?



72% Business events professional

28% Supplier serving business events professionals

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



86% U.S.

5% Canada

3% APAC Region

5% EMEA region

1% Latin America



81% U.S.

5% Canada

3% APAC Region

8% EMEA region

3% Latin America

DEC

JAN

FEB

MAR

APR

MAY

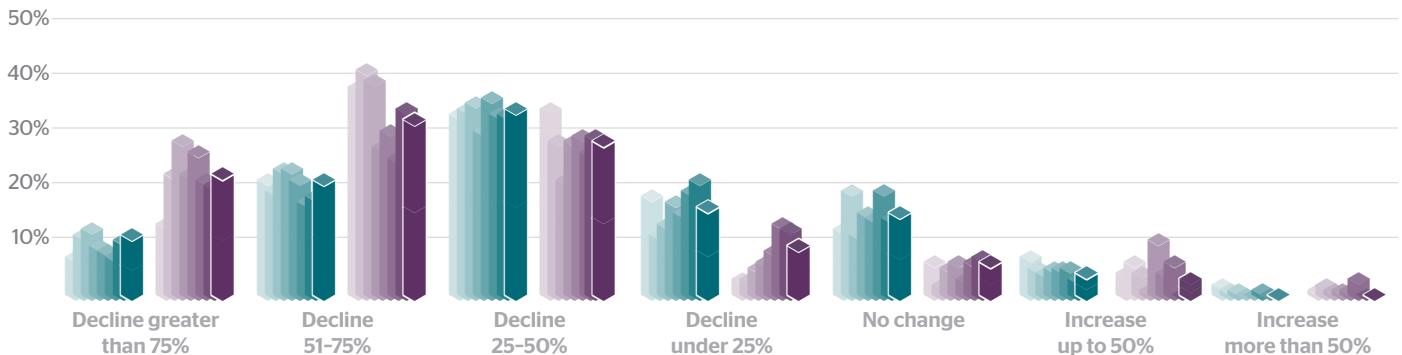
JUNE

AUG

PLANNER TRACK

SUPPLIER TRACK

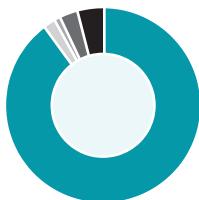
What do you believe will be the overall revenue impact of COVID-19 on your events-related business for 2021?



PLANNER TRACK

SUPPLIER TRACK

Have you been vaccinated against COVID-19?



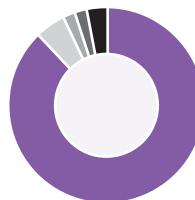
92% Yes, I'm fully vaccinated.

2% Yes, I've had one dose and am scheduled for my second.

1% Not yet, but I plan to get the vaccine.

3% I don't plan to get the vaccine.

4% I prefer not to answer.



89% Yes, I'm fully vaccinated.

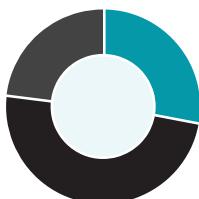
5% Yes, I've had one dose and am scheduled for my second.

2% Not yet, but I plan to get the vaccine.

2% I don't plan to get the vaccine.

3% I prefer not to answer.

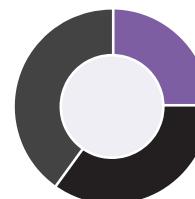
Will you require attendees, staff, and visitors to show proof of vaccination in order to participate in your face-to-face or hybrid event?



28% Yes

49% No

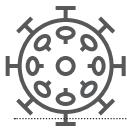
23% N/A



25% Yes

34% No

41% N/A



PLANNER TRACK

SUPPLIER TRACK

What do you consider your biggest achievement during the last six months?

PLANNERS SPEAK

"Pivoting to Zoom and demonstrating my value to my organization."

"We survived and thrived! We made it this far with much success of our virtual events and we were able to reach a wider audience."

"[Mastering] the ability to adapt at the rapidly changing event environment. Also, having a record year in terms of sponsorship sales."

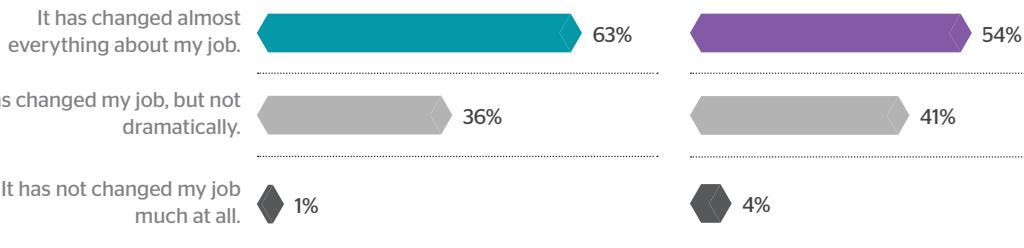
SUPPLIERS SPEAK

"Our organization switching to fully virtual programs, mastering execution and design, and offering our clients quality solutions."

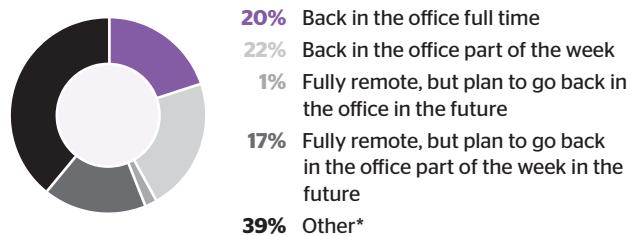
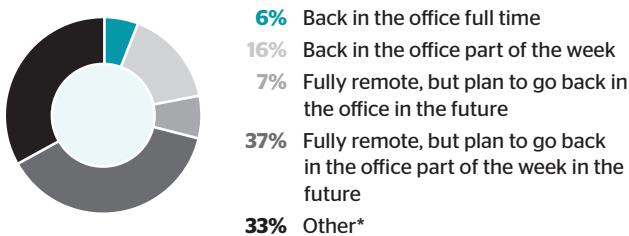
"Not quitting. Continuing to serve my clients well, even though they have all canceled their 2020 and 2021 programs, and not yet rebooking."

"Operating several SAFE face-to-face events in our destinations in LATAM."

Which of these statements most closely matches your experience since the pandemic started?

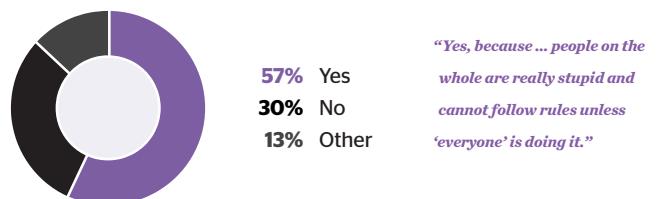
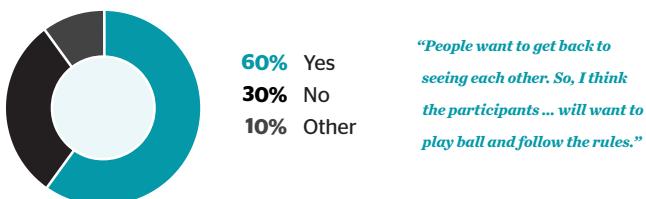


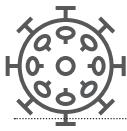
If you work in an office, are you:



* The majority of respondents choosing "other" stated they have always worked remotely.

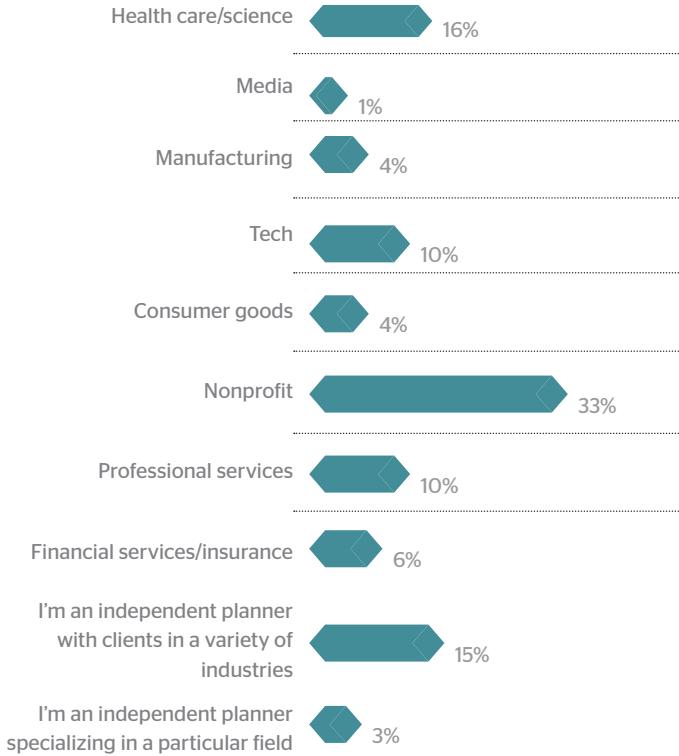
Do you think the CDC's recently revised recommendation that fully vaccinated individuals wear masks indoors in areas where the Delta variant is a major concern will make participants less inclined to attend in-person events?



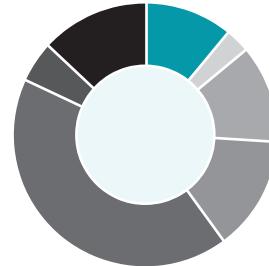


PLANNER TRACK

What best describes the industry you represent?

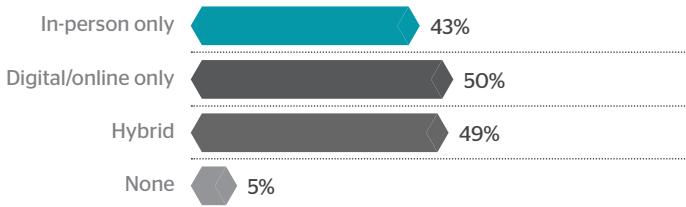


Has the rise in the Delta variant changed your plans for in-person and hybrid events scheduled in the coming months?

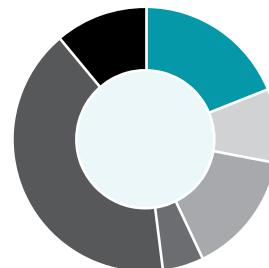


- 11%** Yes, we are canceling our in-person event for digital only.
- 3%** Yes, we are canceling our in-person event with no digital version offered.
- 12%** No, we are moving forward with our in-person event.
- 14%** No, we are moving forward with our in-person/hybrid event.
- 41%** We're taking a wait-and-see approach and closely monitoring the situation in our host destination.
- 5%** We're regularly polling our potential registrants to gauge their in-person attendance comfort level before making a decision.
- 13%** Other

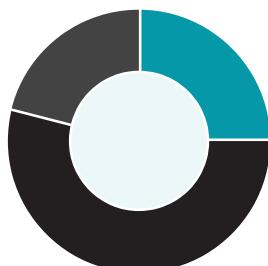
What type of event are you planning in 2021? (Choose all the apply)



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

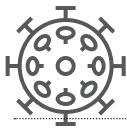


What is the anticipated date of your in-person or hybrid event planned for 2021?



- 30%** Q3
- 57%** Q4
- 26%** N/A

- 19%** 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
- 9%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, without ability to interact via the event platform
- 15%** Simultaneous, small in-person event with streaming video for virtual audience; no separate online content for digital participants
- 5%** Hub-and-spoke model: small regional in-person events held simultaneously with separate content for digital audience
- 41%** N/A
- 12%** Other



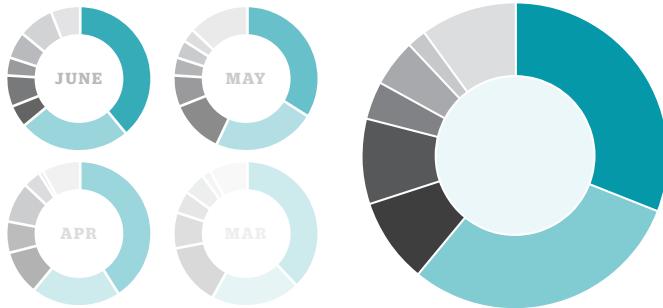
PLANNER TRACK

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



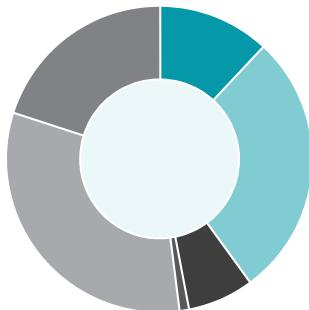
- 9%** We are making a go/no-go decision within four months of event date.
- 9%** We are making a go/no-go decision within three months of event date.
- 36%** We are making a go/no-go decision within two months of event date.
- 30%** Not applicable
- 16%** Other

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



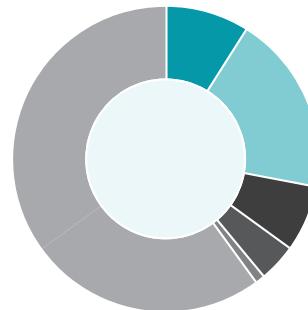
- 31%** Budgeting/pricing for a hybrid (in-person + digital) events
- 30%** How to budget in terms of face-to-face attendance expectations
- 9%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 9%** What to charge digital participants
- 4%** What to charge digital 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
- 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)?

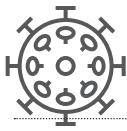


- 12%** Decline greater than 50%
- 28%** Decline up to 50%
- 7%** Same
- 1%** Increase up to 50%
- 0%** Increase of more than 50%
- 32%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 20%** N/A

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

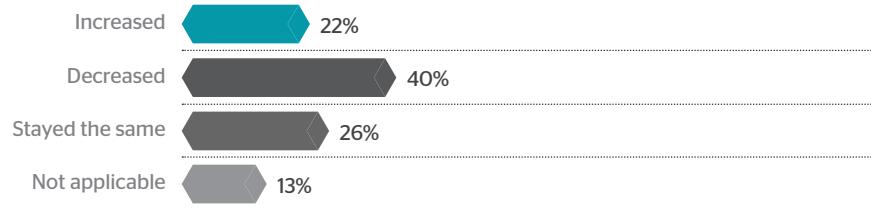


- 9%** Decline greater than 50%
- 19%** Decline up to 50%
- 7%** Same
- 4%** Increase up to 50%
- 1%** Increase of more than 50%
- 24%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 35%** N/A

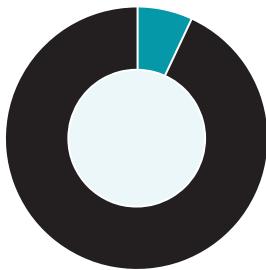


PLANNER TRACK

When planning for upcoming in-person or hybrid events, compared with 2019, has your budget:



During the time of the pandemic, we also saw racial and gender issues come to the forefront. In your registration forms for online and in-person events, are you asking registrants to identify their race?



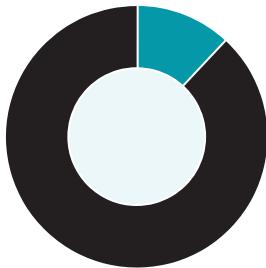
93% No

7% If yes, how are you phrasing the question and for what purpose/s are you collecting this information?

“To create programming that is more inclusive.”

“We are using the info [from optional demographic questions] in aggregate to better understand and further diversify our audience and speakers.”

Are you asking registrants to identify their gender with non-binary options?



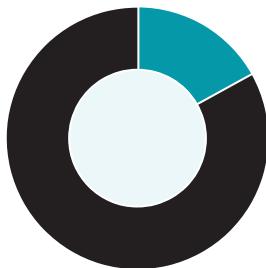
88% No

12% If yes, how are you phrasing the question and for what purpose/s are you collecting this information?

“My gender pronoun is’ with a drop down of options.”

“We started doing this pre-pandemic. We give them the option to indicate their gender preference on their name badge to show we respect their gender identity.”

Are you including other new questions that you haven't previously asked in your registration forms?

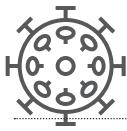


83% No

17% If yes, how are you phrasing the question and for what purpose/s are you collecting this information?

“We are asking anyone who registers for the event to attest to being vaccinated. If they do not attest to this, they are only able to register for the virtual event.”

“We are asking registrants to certify our vaccination statement and to acknowledge, accept and agree to our liability waiver as it pertains to COVID.”



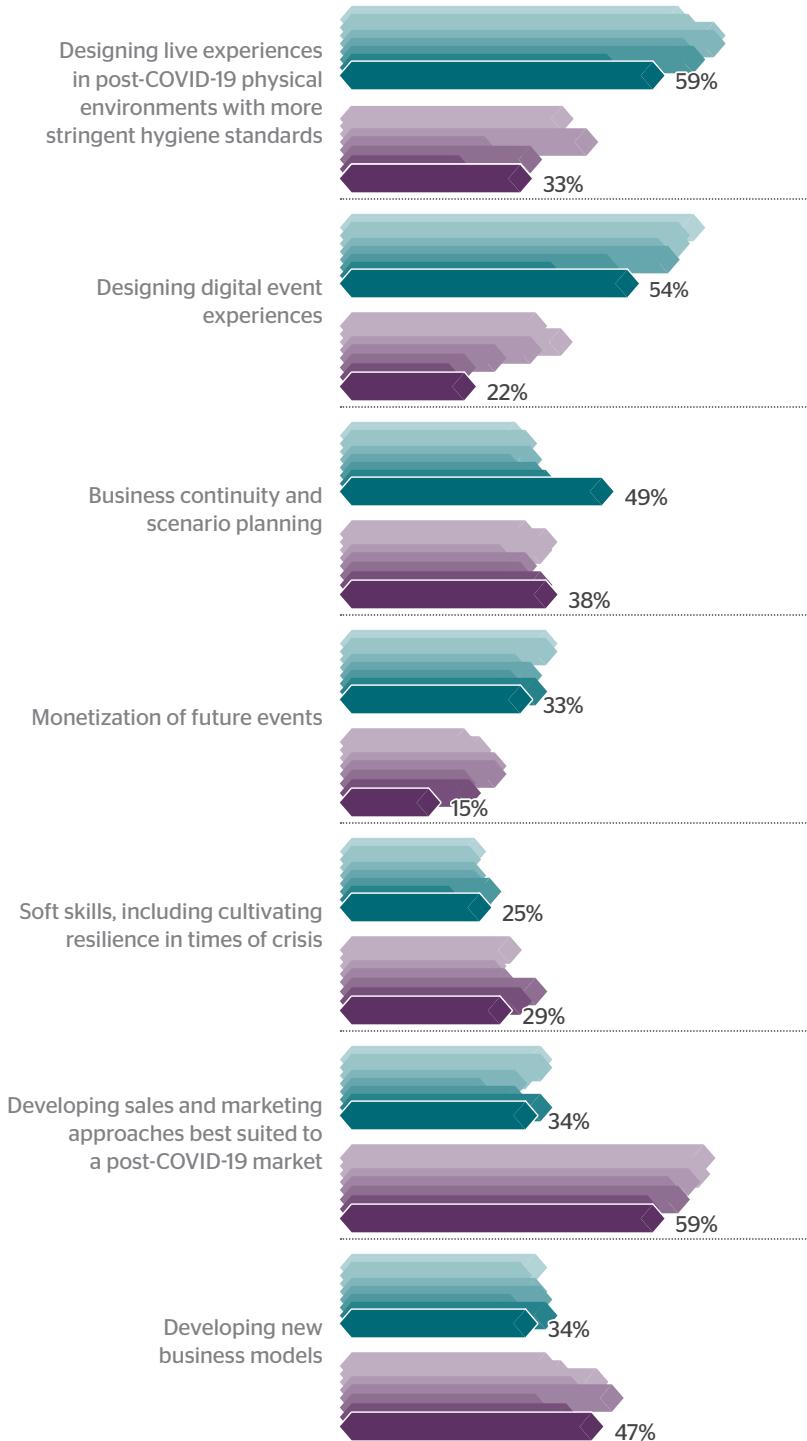
PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: AUGUST 12-17, 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? (Choose all that apply.)



PLANNERS SPEAK

“Multi-disciplinary specialization within team. [We] cannot afford separate experts for the face-to-face, digital, and hybrid in any part of the business (marketing, design, education, business development, etc.)”

“New ways of data tracking to predict future behavior/break reliance on pre-COVID data.”

“Managing guests who don’t want to follow local guidelines — and executives who don’t want to enforce them.”

SUPPLIER PERSPECTIVE

“Soft skills are important. We do not want to overreact to something that is temporary. And if it isn’t temporary then the world will be changed forever and we will have bigger things to be concerned about.”

“Better contract negotiation for constantly updated and shifting force majeure/cancel/postponement parameters.”