

PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: SEPTEMBER 21-27, 2021

COVID-19 Recovery Dashboard

Survey conducted by Curt Wagner

Original design by Point Five

Charts by Kayla Feldstein

Analysis by Michelle Russell

If the results of our latest COVID-19 Recovery Dashboard Survey tell one story, it's this: We're much less anxious about the future than we were just a month ago. When asked to describe how they were feeling, 29 percent of planners and 26 percent of suppliers said they were anxious during the week this dashboard was conducted, Sept. 21-27. When responding to our survey a month earlier, Aug.12-17, 47 percent of planners and 42 percent of suppliers had reported feeling anxious.

At the other end of the spectrum, positive feelings among the 354 planners and 115 suppliers who responded to the September dashboard went up a bit, but not to the same extent as that drop in anxiety: One-third of planners said they were hopeful compared to 27 percent in August; for suppliers, it was 34 percent in September vs. 31 percent in August. Sixteen percent of suppliers (vs. 5 percent in August) also said they were feeling inspired and creative.

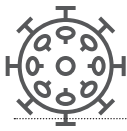
But the other emotions respondents checked off indicate that the COVID whiplash they were experiencing in August — when the Delta variant caused COVID cases to spike, dashing earlier hopes for a smooth recovery of face-to-face business events — has coalesced into more of a sense of resolve. A slightly higher percentage of respondents reported feeling determined and a larger percentage of planners said they were doing their best to get by (insert gritted-teeth emoji) compared to the August results.

We can see this collective grit in another part of the survey: More planners and suppliers said in September that they think it's necessary to develop soft skills — including cultivating resilience in times of crisis — to

succeed professionally during the recovery. One planner cited “remaining resilient” as her biggest achievement in the last six months.

The emotional toll more than 18 months of dealing with the pandemic has taken on events industry professionals can't be understated. In the open-ended comments, many expressed feeling angry, frustrated, defeated, disappointed, and exhausted — and there was, in fact, an uptick in the percentage of planners and suppliers who reported feeling exhausted and burned out in September compared to August: more than one-third of planners (vs. 31 percent) and more than a quarter of suppliers (vs. 21 percent).

The percentage of planners in September vs. August who said they were canceling their in-person event for digital only in the coming months in response to the Delta variant more than doubled — 23 percent compared to 11 percent. At the same time, more said they are moving forward with a hybrid event: 19 percent vs. 14 percent. When asked a different way, only three in 10 planners said they are planning an in-person-only event for the remainder of this year, compared to more than two out of five who said the same in August. Nearly half are planning a digital-only event (around the same as last survey) and



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only 35 percent is planning a hybrid event for Q4 2021 compared to the 49 percent of planners who were doing so in August. The percentage of those who are taking a wait-and-see approach and closely monitoring the COVID situation was cut by half: Only 21 percent said they are biding their time, compared to 41 percent in August.

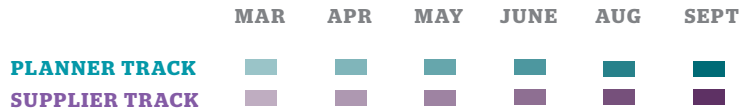
Taken together, the open-ended comments may be summed up this way: “Enough already.” Which could help explain another big jump between the two surveys, just one month apart. While we continue to hash out what it takes to safely bring people together in person for events, the latest survey responses point to one approach gaining ground to minimize the risk of exposure to COVID: mandating vaccination.

Forty percent of planners and 43 percent of suppliers — vs. 28 percent and 25 percent, respectively, in August — said they will require attendees, staff, and visitors to show proof of vaccination to participate in their face-to-face or hybrid event. When asked why they wouldn’t enforce a vaccine mandate, some expressed concern that it would be divisive or send a political message. But this planner has looked beyond the potential objections of individual audiences and had this to say about whether such a requirement should be enforced: “100% ABSOLUTELY! This has to become a standard! We are a global industry and we can impact the world in the most positive ways.”

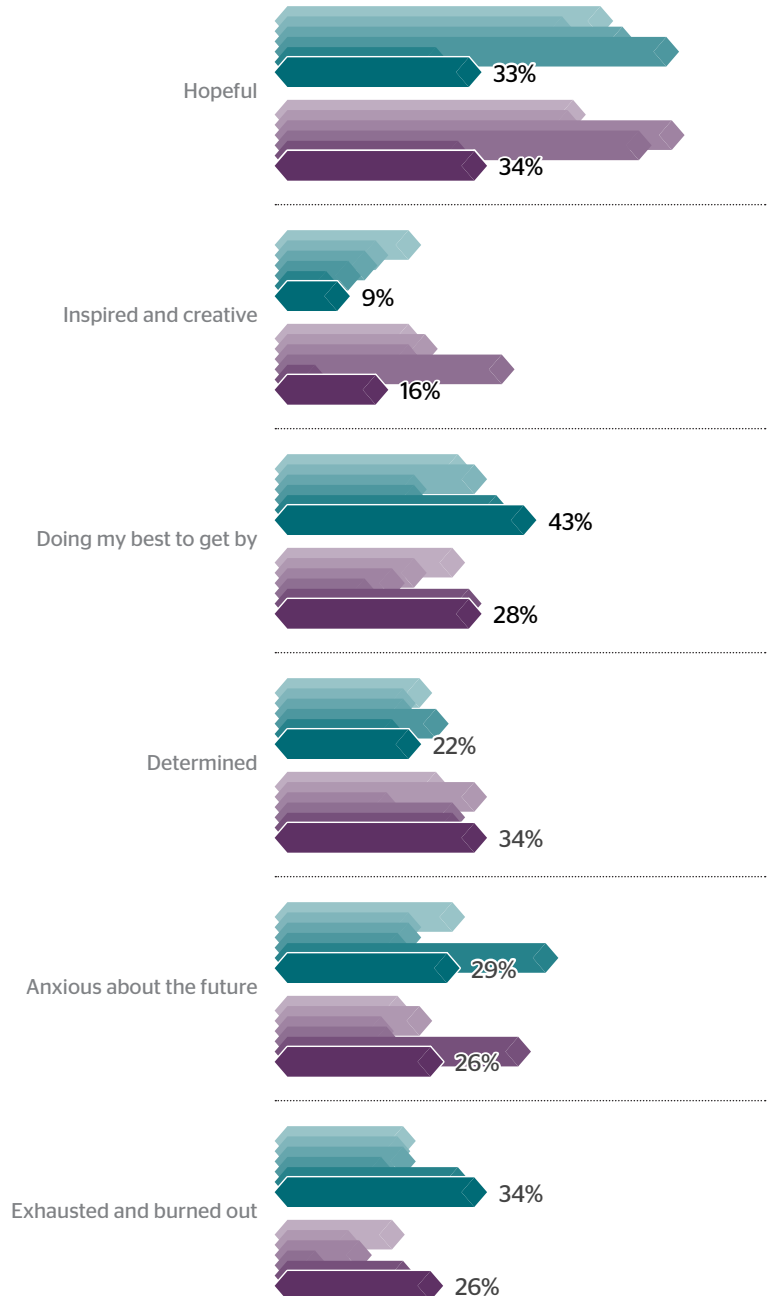
The writer of an article I recently read suggested that we stop referring to “waves” of COVID, since the metaphor is tied to the ceaseless and relentless movement of the ocean. Instead, the writer said, we should consider our experience akin to a roller-coaster ride — there are highs and lows, for sure. But eventually, the ride ends and we get off. It’s healthier for our psyche to think in terms of an end to this pandemic.

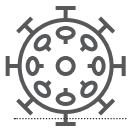
While the world waits for that full stop, planners are setting their sights on more of a return to business as usual in first and second quarters of 2022, when nearly half are planning a hybrid event. Another half are planning an in-person-only event, like this respondent, who wrote: “We are crossing our fingers and jumping in with two feet.” We’re all hoping for a safe landing.

Curt Wagner is an associate editor at *Convene*. Kayla Feldstein is a digital marketing associate at PCMA. Michelle Russell is *Convene*’s editor in chief.

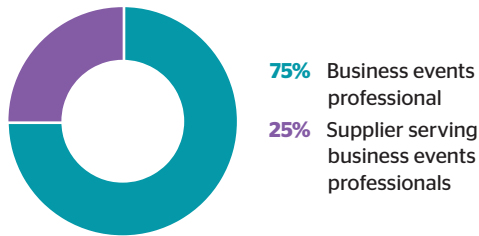


We appreciate your input in this survey. We’d like to check in with you first. What best describes how you’re feeling right now? (Choose all that apply.)

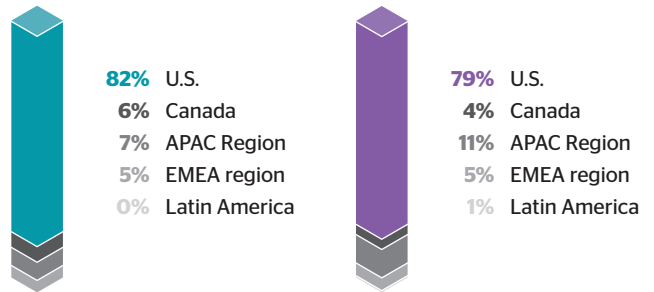




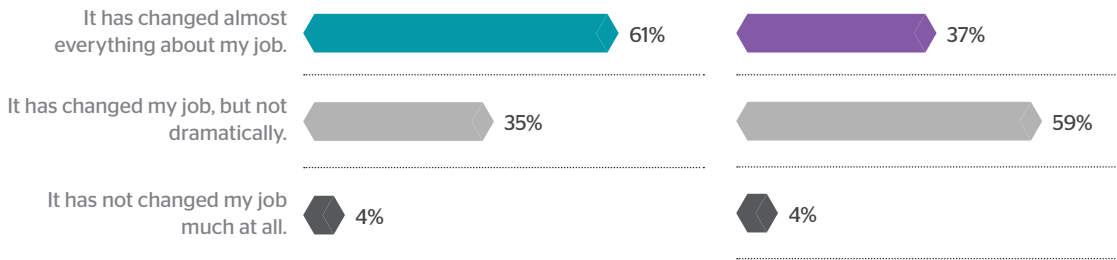
What best describes your role in the business events industry?



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



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



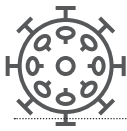
What do you consider your biggest achievement during the last six months?

PLANNERS SPEAK

- “Keeping events alive thanks to digital solutions.”*
- “Creating pandemic guidelines for our organization’s onsite meetings.”*
- “Producing Singapore’s 56th National Day Parade Show despite the uncertainty and chaos caused by the Delta variant.”*
- “Successfully overseeing multiple concurrent in-person and virtual conferences.”*
- “Earning my CMP designation!”*
- “Creating cost effective digital systems/programs to run alongside our traditional in-person offerings.”*

SUPPLIERS SPEAK

- “Leading our team through the roller coaster that is the event industry at the moment with as positive of an attitude as possible.”*
- “Securing new business through investigating new opportunities.”*
- “[Conducting] a full review of all operating practices with improvements in place to support future business. Also reviewed all contracts and routine expenditure and removed significant costs from areas by changing work practices where costs were caused by ‘we’ve always done it like that!’ habits.”*
- “We have developed a full featured virtual event line of business that complements our in-person event services.”*



JAN

FEB

MAR

APR

MAY

JUNE

AUG

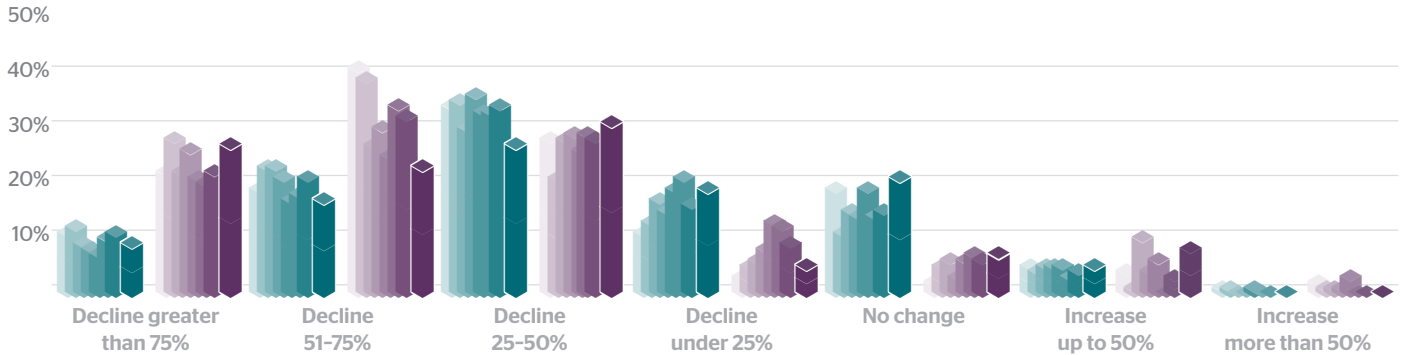
SEPT

PLANNER TRACK

SUPPLIER TRACK



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



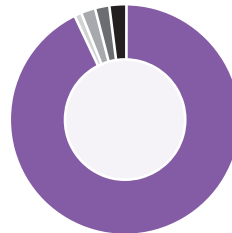
PLANNER TRACK

SUPPLIER TRACK

Have you been vaccinated against COVID-19?

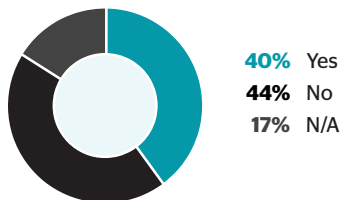


- 93%** Yes, I'm fully vaccinated.
- 0%** Yes, I've had one dose and am scheduled for my second.
- 1%** Not yet, but I plan to get the vaccine.
- 2%** I don't plan to get the vaccine.
- 4%** I prefer not to answer.

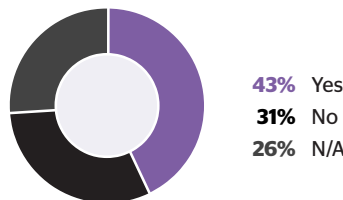


- 92%** Yes, I'm fully vaccinated.
- 1%** Yes, I've had one dose and am scheduled for my second.
- 2%** Not yet, but I plan to get the vaccine.
- 2%** I don't plan to get the vaccine.
- 2%** I prefer not to answer.

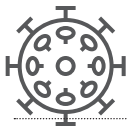
Will you require attendees, staff, and visitors to show proof of vaccination in order to participate in your face-to-face or hybrid event?



- 40%** Yes
- 44%** No
- 17%** N/A

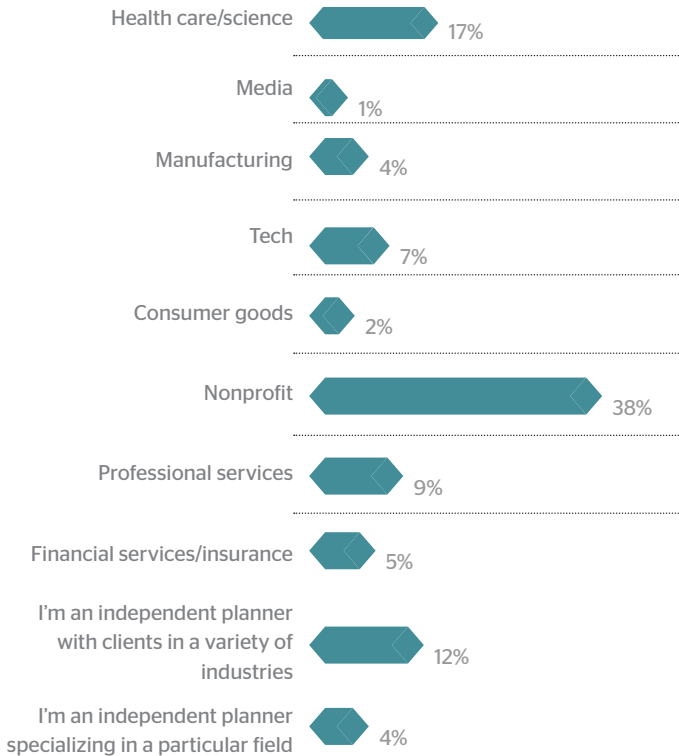


- 43%** Yes
- 31%** No
- 26%** N/A



PLANNER TRACK

What best describes the industry you represent?

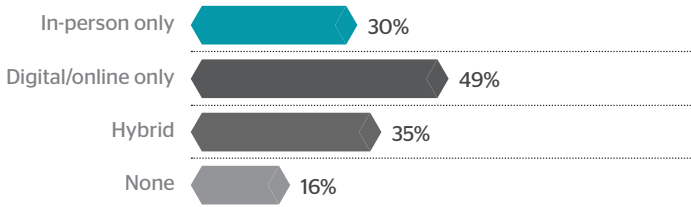


Has the rise in the Delta variant changed your plans for in-person and hybrid events scheduled in the coming months?

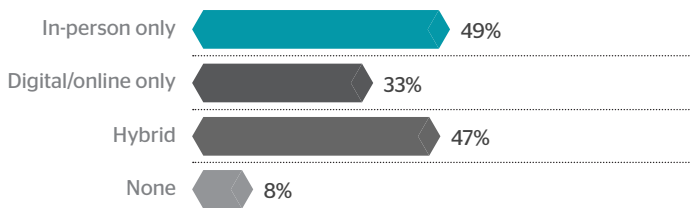


- 23%** Yes, we are canceling our in-person event for digital only.
- 3%** Yes, we are canceling our in-person event with no digital version offered.
- 14%** No, we are moving forward with our in-person event.
- 19%** No, we are moving forward with our in-person/hybrid event.
- 21%** We're taking a wait-and-see approach and closely monitoring the situation in our host destination.
- 4%** We're regularly polling our potential registrants to gauge their in-person attendance comfort level before making a decision.
- 15%** Other (See some responses below.)

What type of event are you planning in Q4 2021? (Choose all that apply.)



What type of event are you planning in Q1-2 2022? (Choose all that apply.)



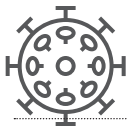
PLANNERS SPEAK

"We are doing what our clients are comfortable with, and if they choose in-person events we are guiding them to ensure delegates feel safe to attend by complying with all COVID regulations."

"With no budget and no interest from our members, we are on hold with everything."

"It's a mixed bag. Some of my clients are moving forward with in-person events with a hybrid option and others are staying fully virtual."

"Both moving forward with in-person events and polling our membership for other meetings."



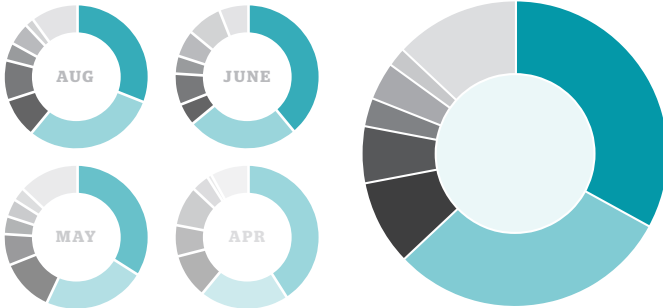
PLANNER TRACK

What is your planning window for in-person or hybrid events in Q4 2021 and Q1-2 2022?



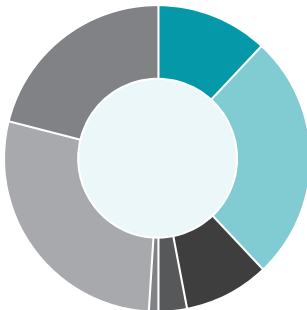
- 14%** We are making a go/no-go decision within four months of event date.
- 15%** We are making a go/no-go decision within three months of event date.
- 44%** We are making a go/no-go decision within two months of event date.
- 17%** Not applicable
- 10%** Other

What is your biggest financial challenge with regard to planning a business event in Q4 2021 and Q1-2 2022? (Please choose one.)



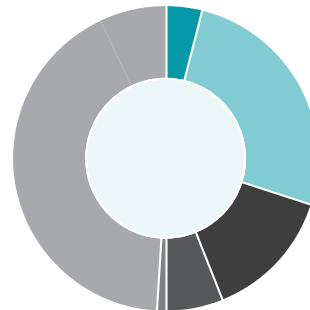
- 32%** Budgeting/pricing for a hybrid (in-person + digital) events
- 30%** How to budget in terms of face-to-face attendance expectations
- 9%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 6%** What to charge digital participants
- 3%** What to charge digital event exhibitors/sponsors
- 4%** Expenses related to event marketing and communications in a post COVID-19 world
- 2%** Deciding on registration pricing for face-to-face participants
- 13%** Other

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

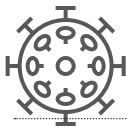


- 12%** Decline greater than 50%
- 26%** Decline up to 50%
- 9%** Same
- 3%** Increase up to 50%
- 1%** Increase of more than 50%
- 28%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 21%** N/A

What kind of overall registration numbers are you expecting for your planned 2022 in-person-only event vs. 2019 (or pre-pandemic 2020)?

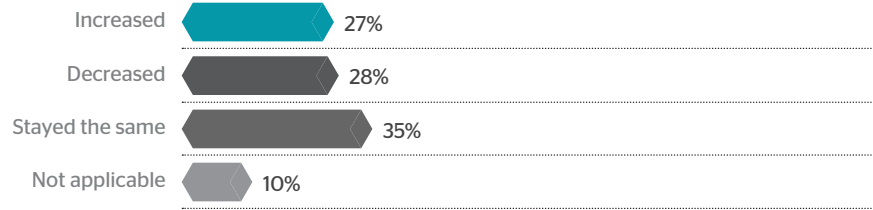


- 4%** Decline greater than 50%
- 26%** Decline up to 50%
- 14%** Same
- 6%** Increase up to 50%
- 1%** Increase of more than 50%
- 42%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 7%** N/A



PLANNER TRACK

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

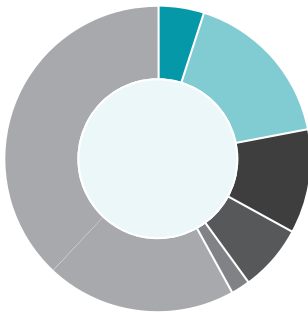


If you are planning a hybrid event, how do you foresee it taking shape?



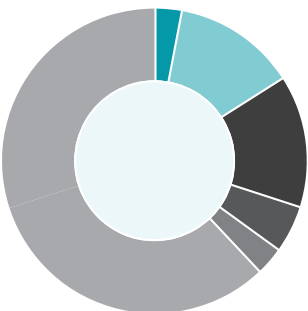
- 20%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, with ability for both audiences to interact via the event platform
- 12%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, without ability for both audiences to interact via the event platform
- 19%** Simultaneous, small in-person event with streaming video for virtual audience; no separate online content for digital participants
- 3%** Hub-and-spoke model: small regional in-person events held simultaneously with separate content for digital audience
- 31%** N/A
- 15%** Other

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

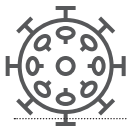


- 5%** Decline greater than 50%
- 17%** Decline up to 50%
- 11%** Same
- 7%** Increase up to 50%
- 2%** Increase of more than 50%
- 20%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 39%** N/A

What kind of overall registration numbers are you expecting for your 2022 hybrid event vs. 2019 (or pre-pandemic 2020)?



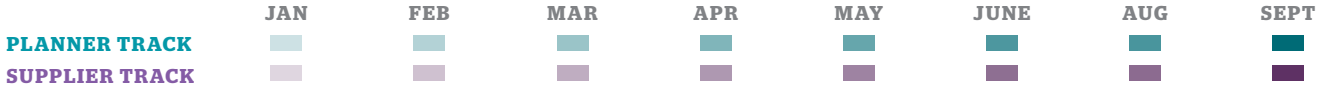
- 3%** Decline greater than 50%
- 13%** Decline up to 50%
- 14%** Same
- 5%** Increase up to 50%
- 3%** Increase of more than 50%
- 32%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 31%** N/A



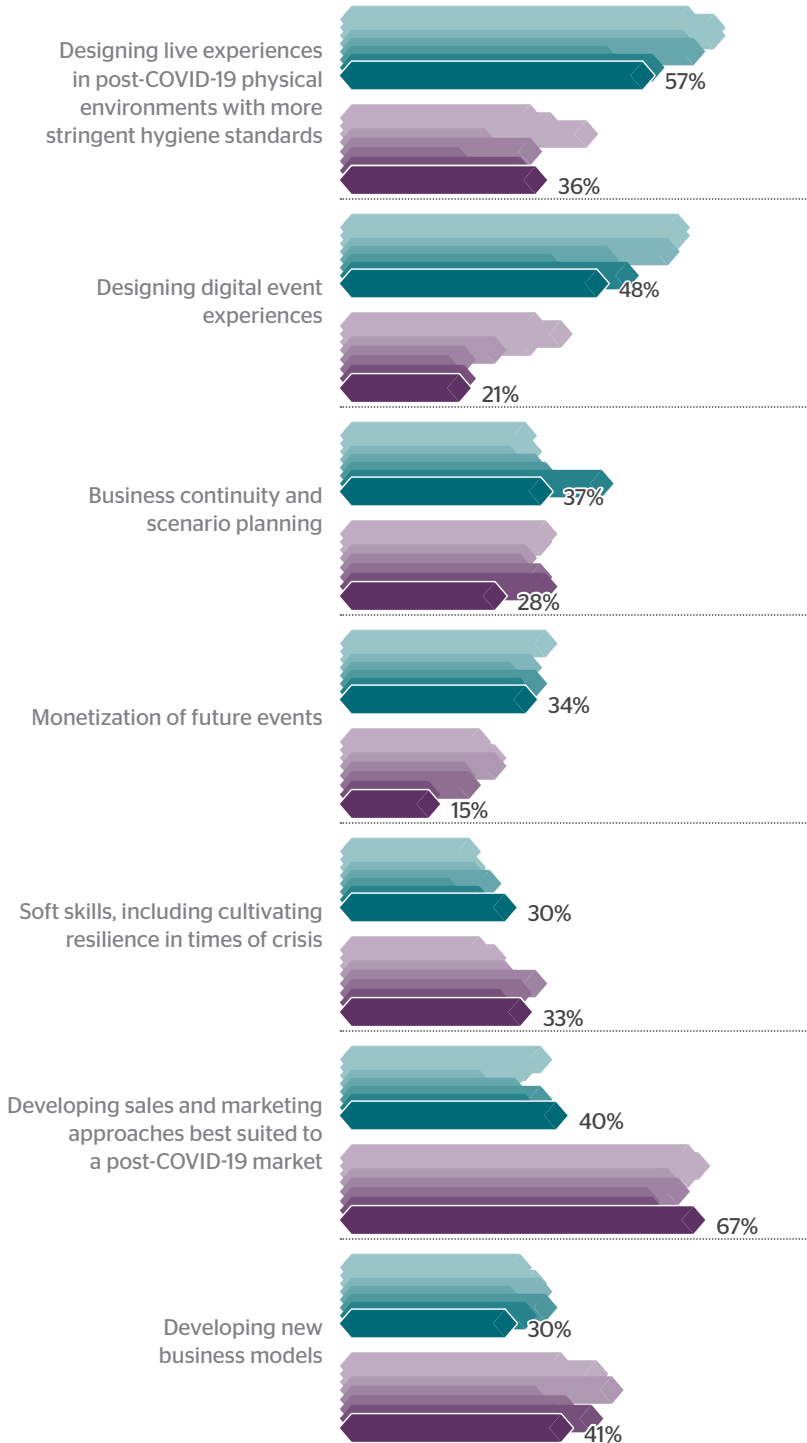
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In order to prepare professionally for success in the business events industry during the recovery, which new skills do you think you need to pursue/develop? (Choose all that apply.)



PLANNERS SPEAK

"Incorporating multiple 'back-up' plans for every event as I can no longer anticipate what is to come — lockdown, another COVID wave, volcanoes, alien invasion. Who knows? The predictability of an event has narrowed so thinking outside the box about expectations of the outcomes has to change as well. The 'box' no longer exists."

"I got the CMP in 2020 and DES in 2021. Now I am looking for a new career field. This is going on too long. My company is keeping me employed, but I have no work to do."

*"How to forge effective relationships virtually with coworkers and suppliers."
"Designing hybrid event experiences that provide equal value for both virtual and in-person attendees."*

"Staying focused on bringing hope and solutions to my company's membership."

SUPPLIER PERSPECTIVE

"Deeply resourced staff experience in both live and virtual events to accommodate pivots in ever-changing event formats."

"Developing business models for everyone that do not polarize or set rules [that exclude] non-vaccinated individuals due to their religious belief."