

PULSE SURVEY

**NEW
DATA**

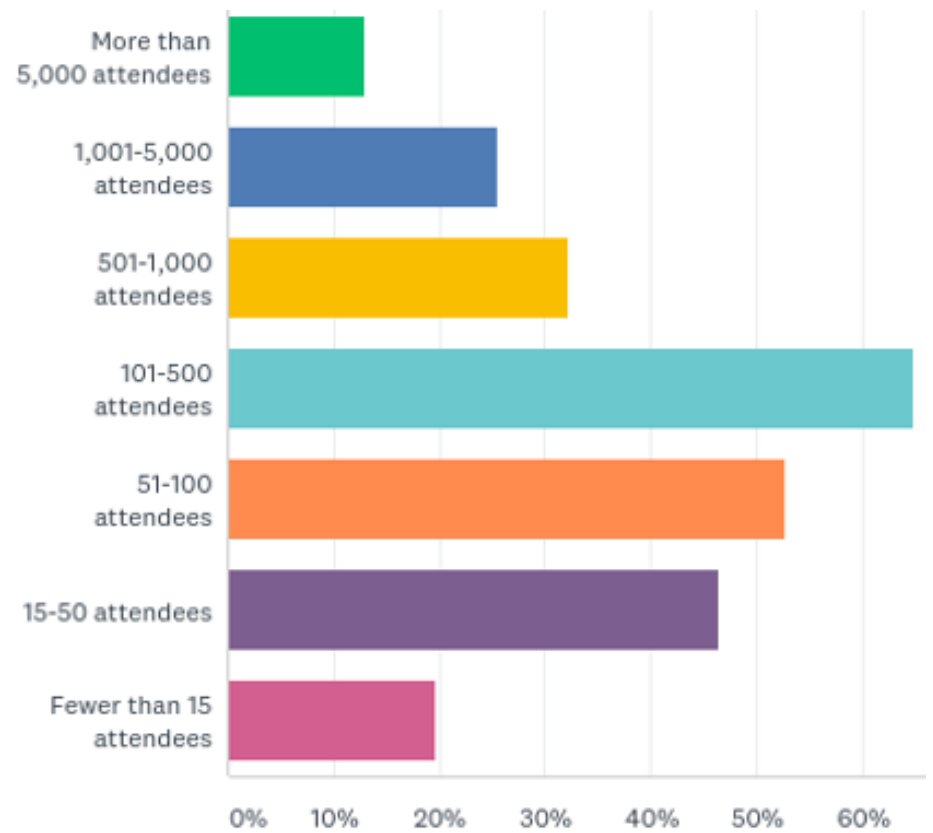
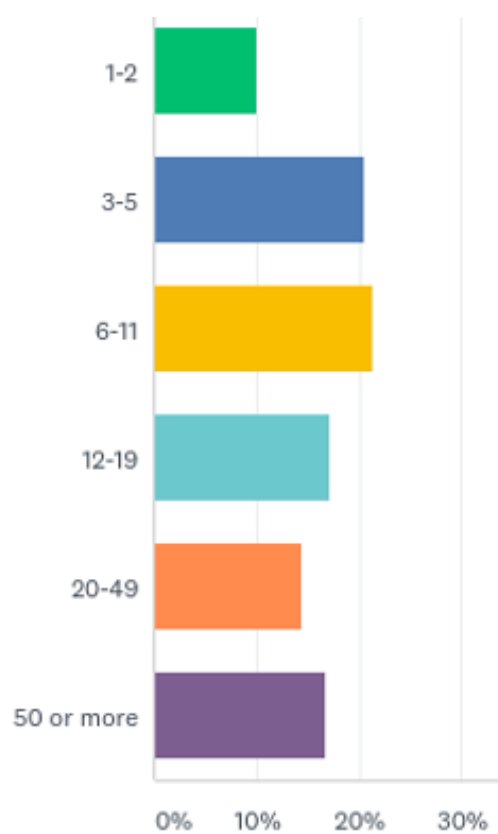
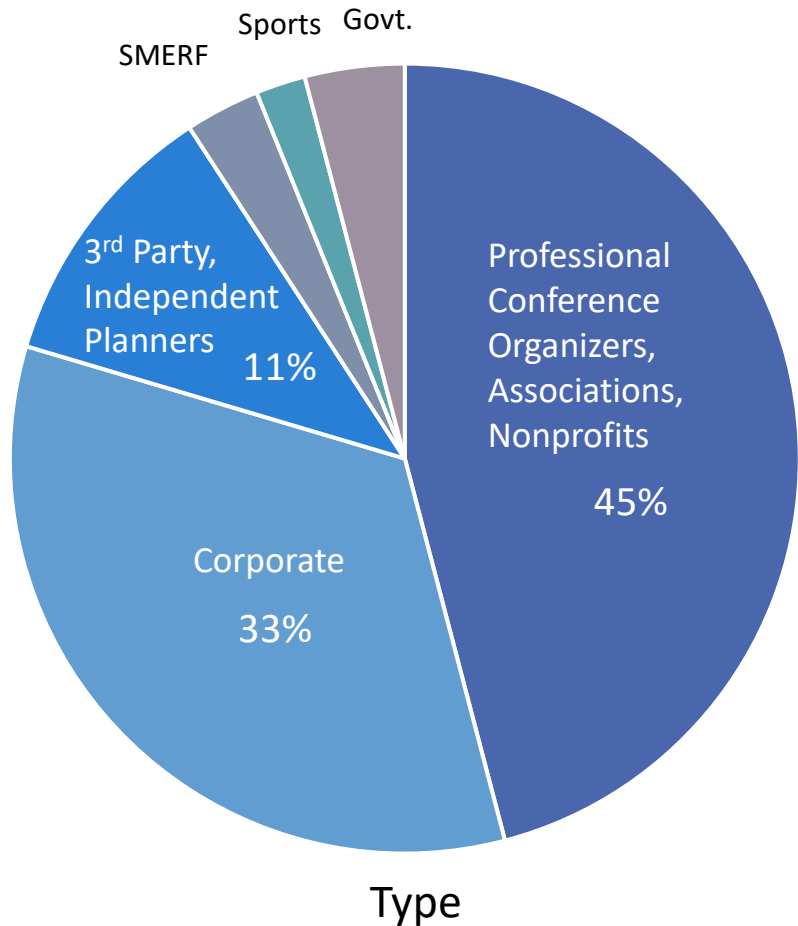
THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19

JULY 9, 2021

 NORTHSTAR
meetings group

Respondents by Type, Meetings Volume and Size

414 Valid Planner Responses



Is the Downturn Officially Over?

New Event Booking Activity (Finally!) Surpasses Rescheduling

Momentum accelerates for recovery though not all planners are focusing on live events.

What is your current primary focus as it pertains to your live, in-person events?

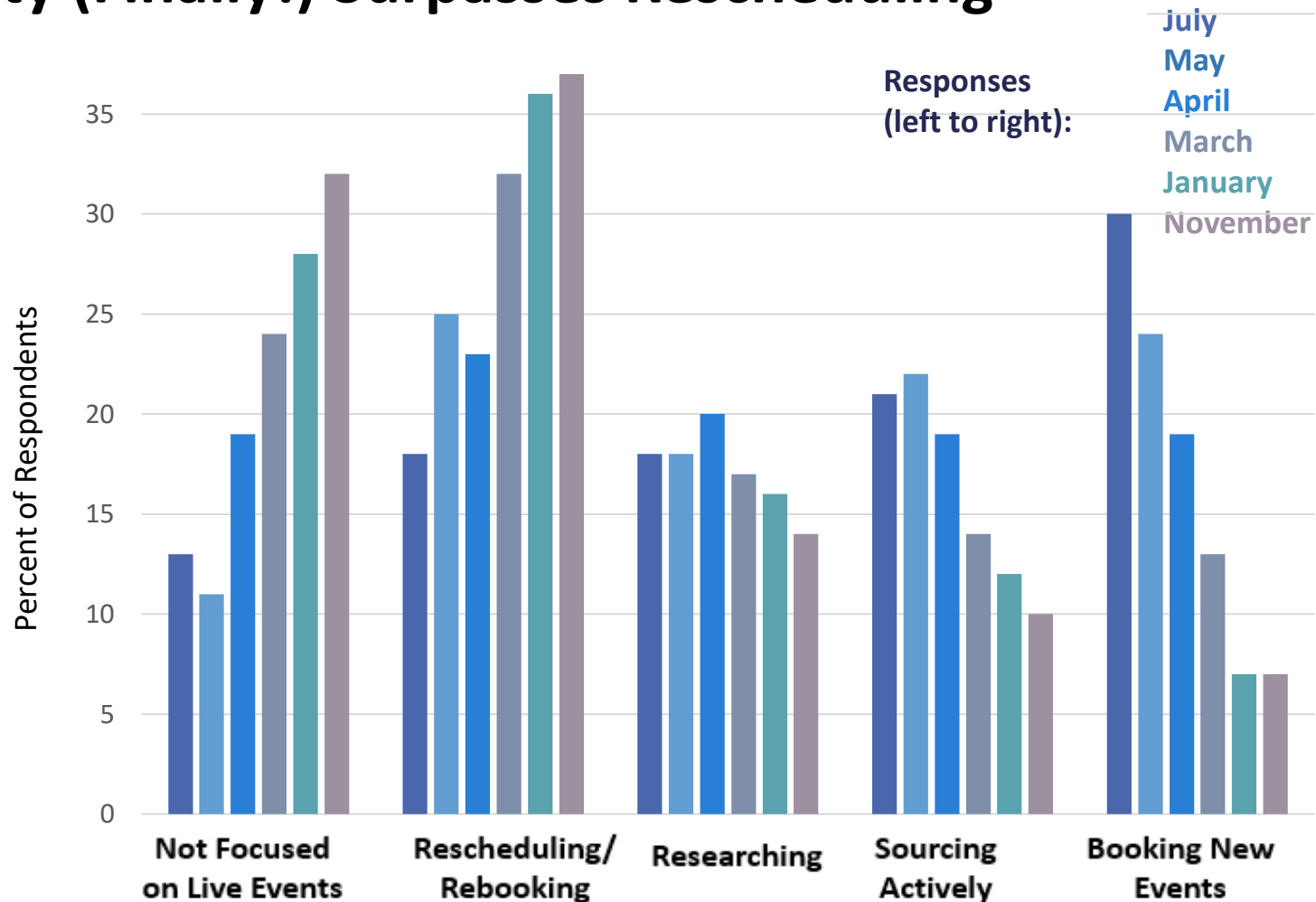
Responses as of July 7, 2021

ANSWER CHOICES

- I am rescheduling or rebooking events
- I am researching potential new events, but not ready to issue an RFP or lead
- I am actively sourcing (issuing RFPs or leads) for new events
- I am booking new events
- I am not currently focused on live, in-person events

RESPONSES

- 17.63%
- 17.89%
- 21.32%
- 30.26%
- 12.89%



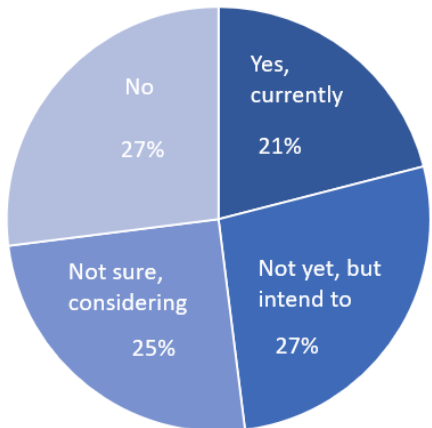
Hybrid Is Happening

As Live Events Come Back, Planning for Hybrid Grows

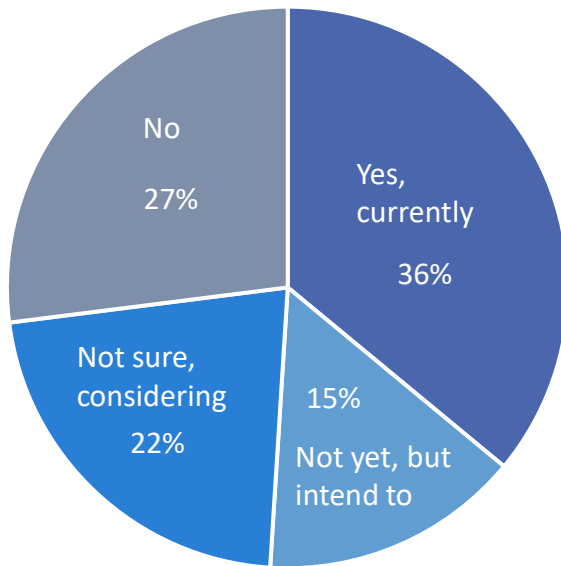
Are you currently planning hybrid events (with both in-person and virtual audiences)?

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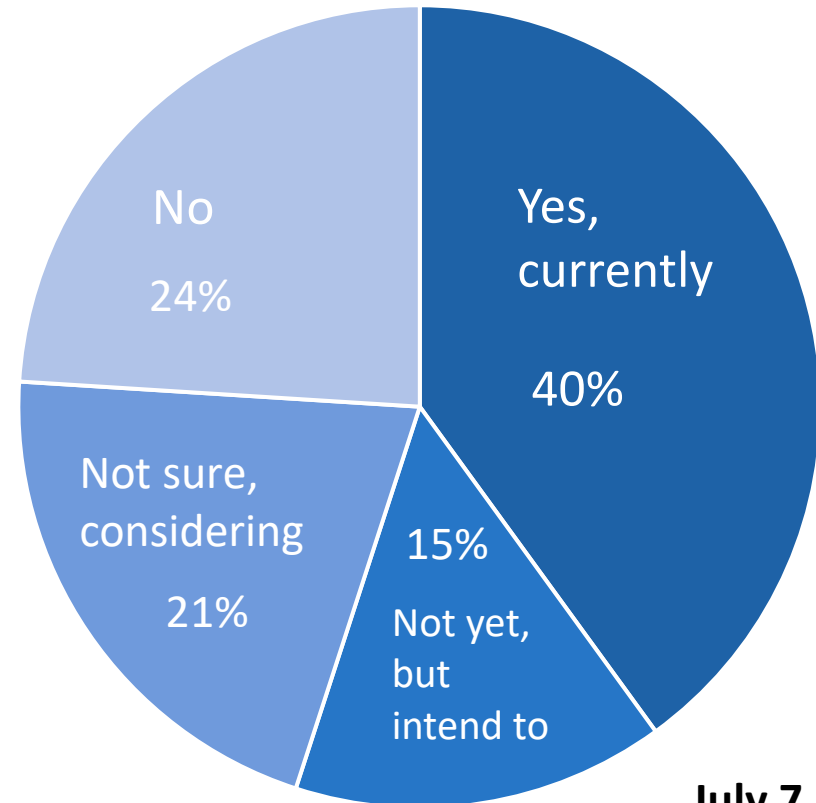
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January 20, 2021



May 25, 2021



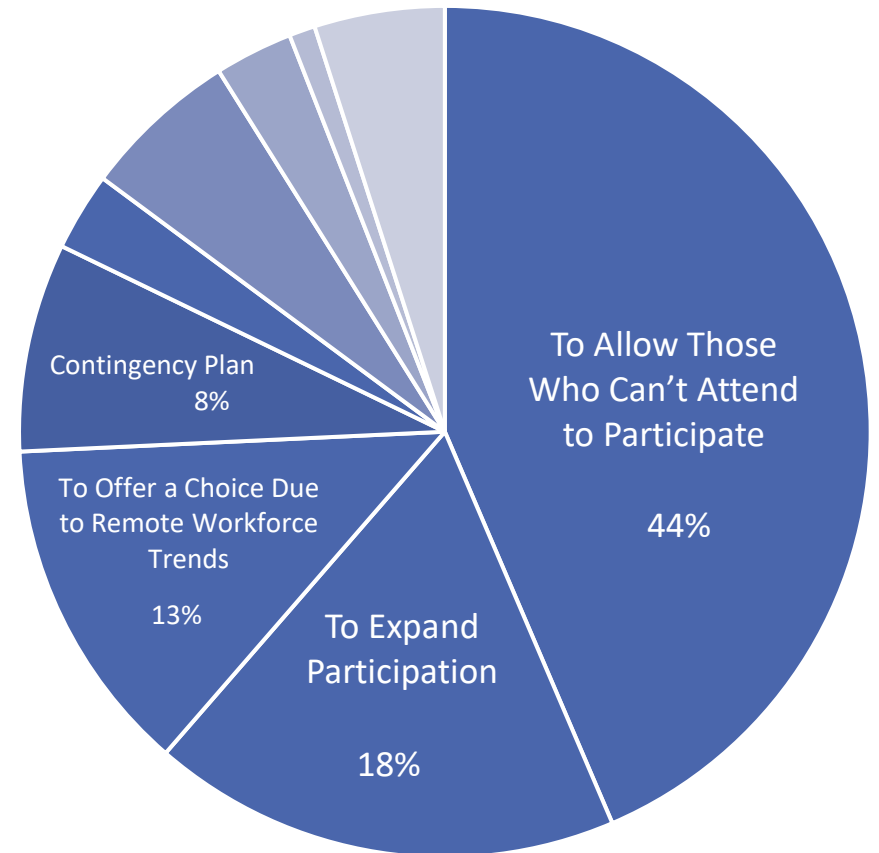
July 7, 2021

For Those Planning Hybrid: It's to Serve Current Stakeholders

What Is the Primary Reason for Planning or Intending to Plan a Hybrid Event?

Of 210 respondents reporting they are *now* planning or intending to plan hybrid.

To allow those who can't attend in person to participate	44.22%
To expand participation to current contacts who are unlikely to attend in person	18.09%
To discover and engage new participants with our events/community	2.51%
To reinvent and repackage our event programming, both in-person and virtually, in response to competitive trends	6.03%
To offer a choice of virtual or in-person participation due to remote workforce trends	12.56%
To maintain digital as a contingency plan, allowing for possible travel/gathering restrictions	8.04%
To increase meeting/event revenue overall	2.51%
To reduce costs associated with our meetings/events	1.01%
Other (please specify)	5.03%



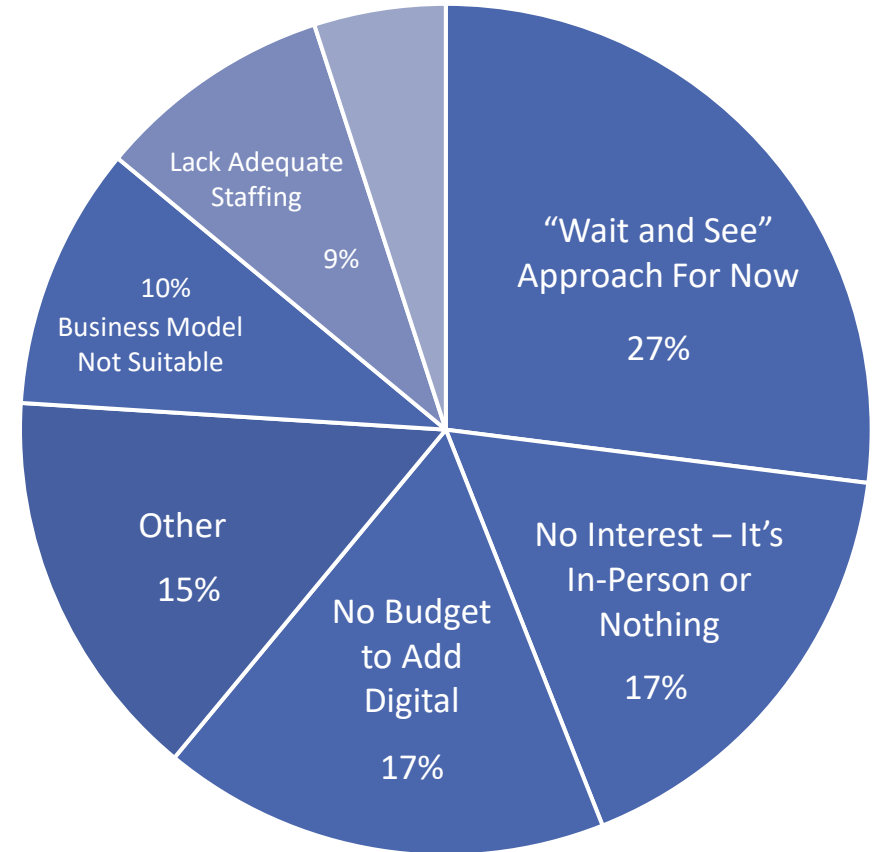
"I can't pick just one – it's for accessibility, for those who can't attend in person, to engage new people, and to offer choice." – Verbatim Comment

For Those Not Planning Hybrid: It's "Wait and See", No Interest or No Budget

What Is the Primary Reason You Are *Not* Planning a Hybrid Event?

Of 172 respondents reporting they are *not* planning hybrid.

ANSWER CHOICES	RESPONSES
Meeting/event business model is not suited to digital technology	10.06%
Content programming is not suited to digital technology	5.33%
We do not have the budget to add a digital component	16.57%
We don't have adequate staffing to produce/support a hybrid event	9.47%
We are taking a wait-and-see approach for now	26.63%
We have no interest; it's either in-person or nothing for us	17.16%
Other (please specify)	14.79%



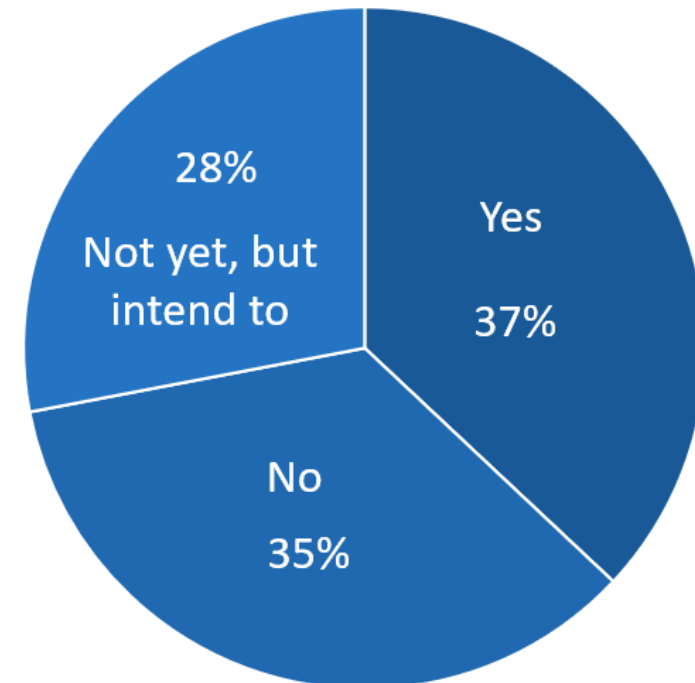
"Our events our extremely interactive. We will run virtual or in-person, but not hybrid. We hope to be mostly in-person as the recovery proceeds, but virtual will now remain a small part of our yearly lineup." – Verbatim Comment

What Is Hybrid's Prospective Business Impact?:

Though most planners seek to quantify it, many already have a hunch.



Has your organization (or your client[s]) forecasted the performance and cost efficiencies of hybrid events relative to in-person-only events?



Hybrid's Broader Audience Comes at a Cost

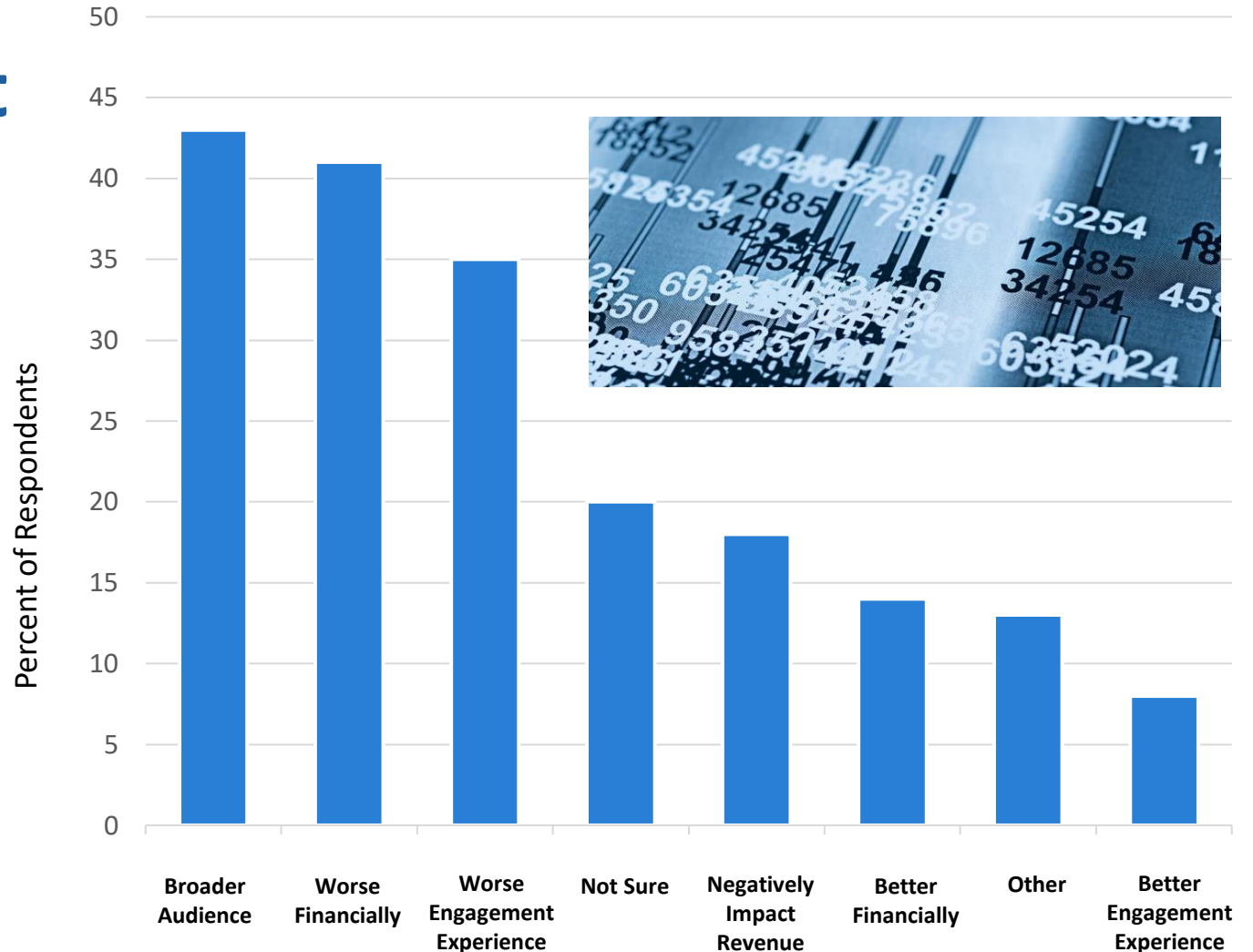
The apparent trade-off is between cost and audience for planner organizations that have forecasted for hybrid.

Of 137 respondents reporting they have forecasted hybrid's performance:

ANSWER CHOICES	RESPONSES
Hybrid will perform better financially	13.87%
Hybrid will perform worse financially	40.88%
Hybrid quality of engagement/experience will be better	8.03%
Quality of engagement/experience will be worse for remote attendees	35.04%
Audience reach is broader for hybrid	43.07%
Hybrid will detract from in-person revenue	17.52%
Have not yet reached any definitive conclusions	19.71%
Other (please specify)	13.14%

July 7, 2021

How do you expect your hybrid events will perform relative to your in-person-only meetings/events? (Select all that apply.)



Hybrid Is an Option, but Only When It Works

For most planners who've crunched the numbers, hybrid is case by case.

Of 137 respondents reporting they have forecasted hybrid's performance:

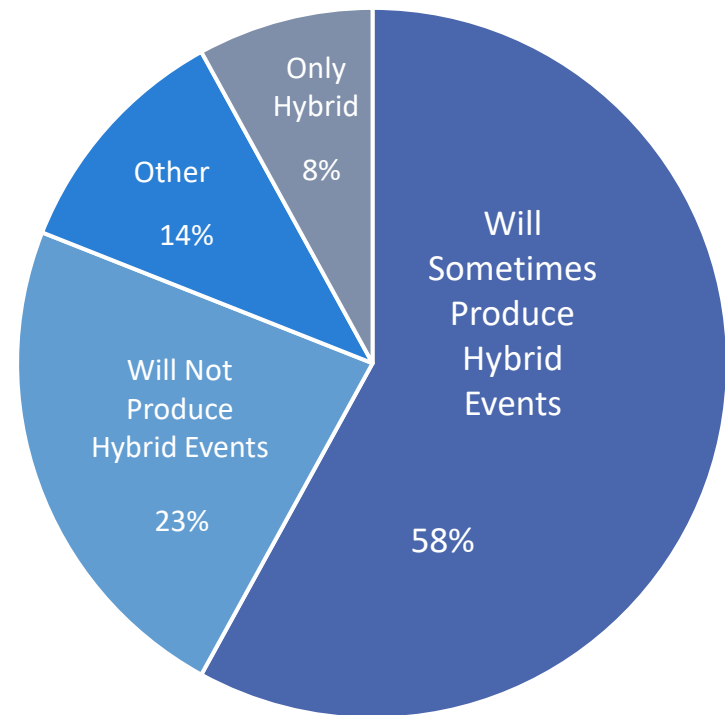
ANSWER CHOICES

We will produce only hybrid events going forward.	8.03%
We will sometimes produce hybrid events (when it's suitable for the meeting/event and the stakeholders).	58.39%
We will not produce any hybrid events going forward.	22.63%
Other (please specify)	10.95%

"We will consider the appropriateness of our hybrid investment based on world events, travel restrictions and travel trends." – Verbatim Comment

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What decisions have you made about how your meetings/event mix will change?



As Business Returns Supplier Staffing Challenges Grow

If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties?
(Select all that apply.)

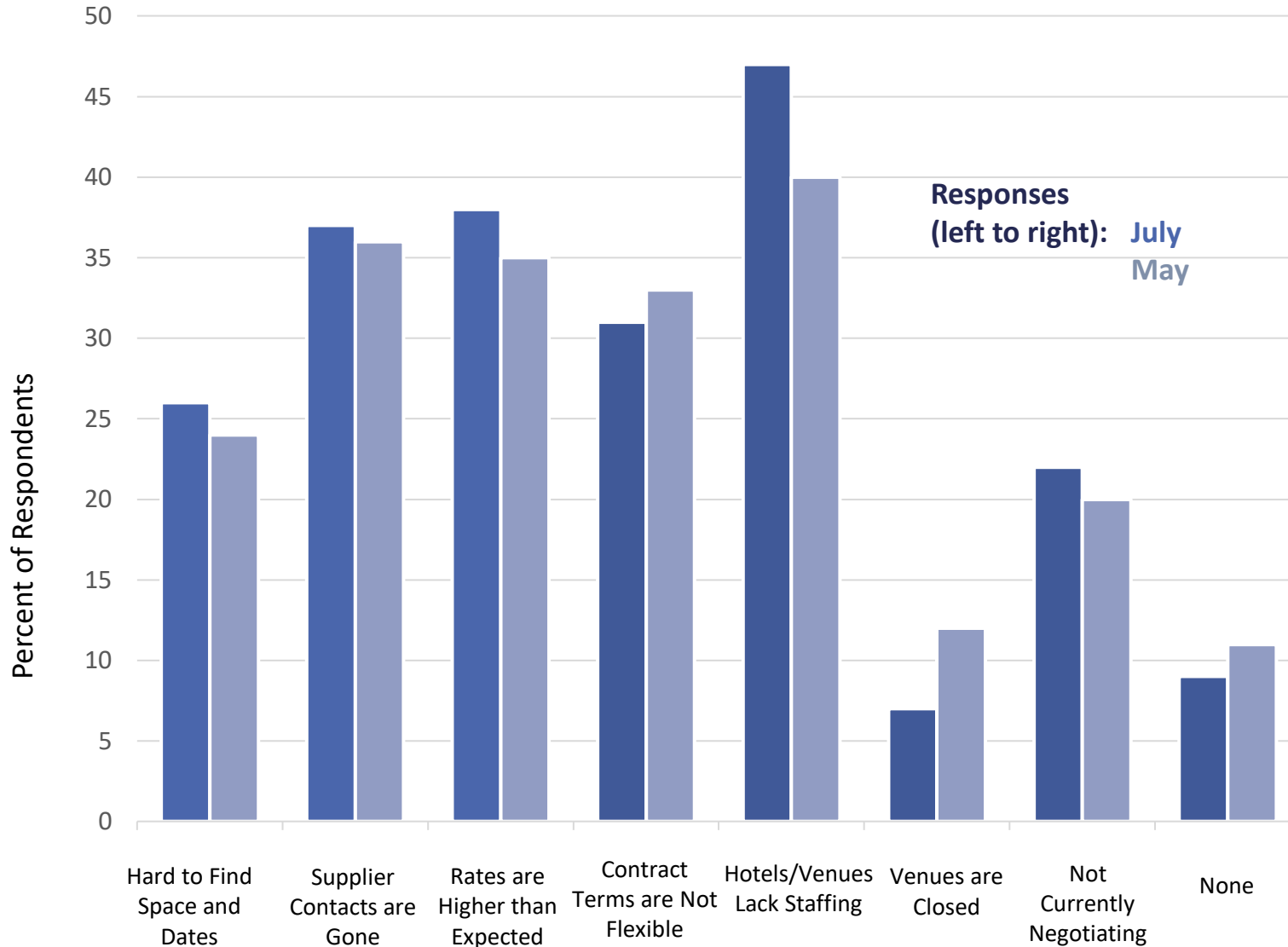
ANSWER CHOICES

- None of the above
- It's hard to find the space and dates I want
- Many of my supplier contacts are gone
- Rates are higher than expected
- Contract terms are not as flexible as needed
- Hotels/venues lack adequate staffing
- Venues I would like to use are closed
- Not currently negotiating

RESPONSES

- 9.22%
- 25.94%
- 37.46%
- 38.33%
- 30.55%
- 46.97%
- 7.49%
- 21.90%

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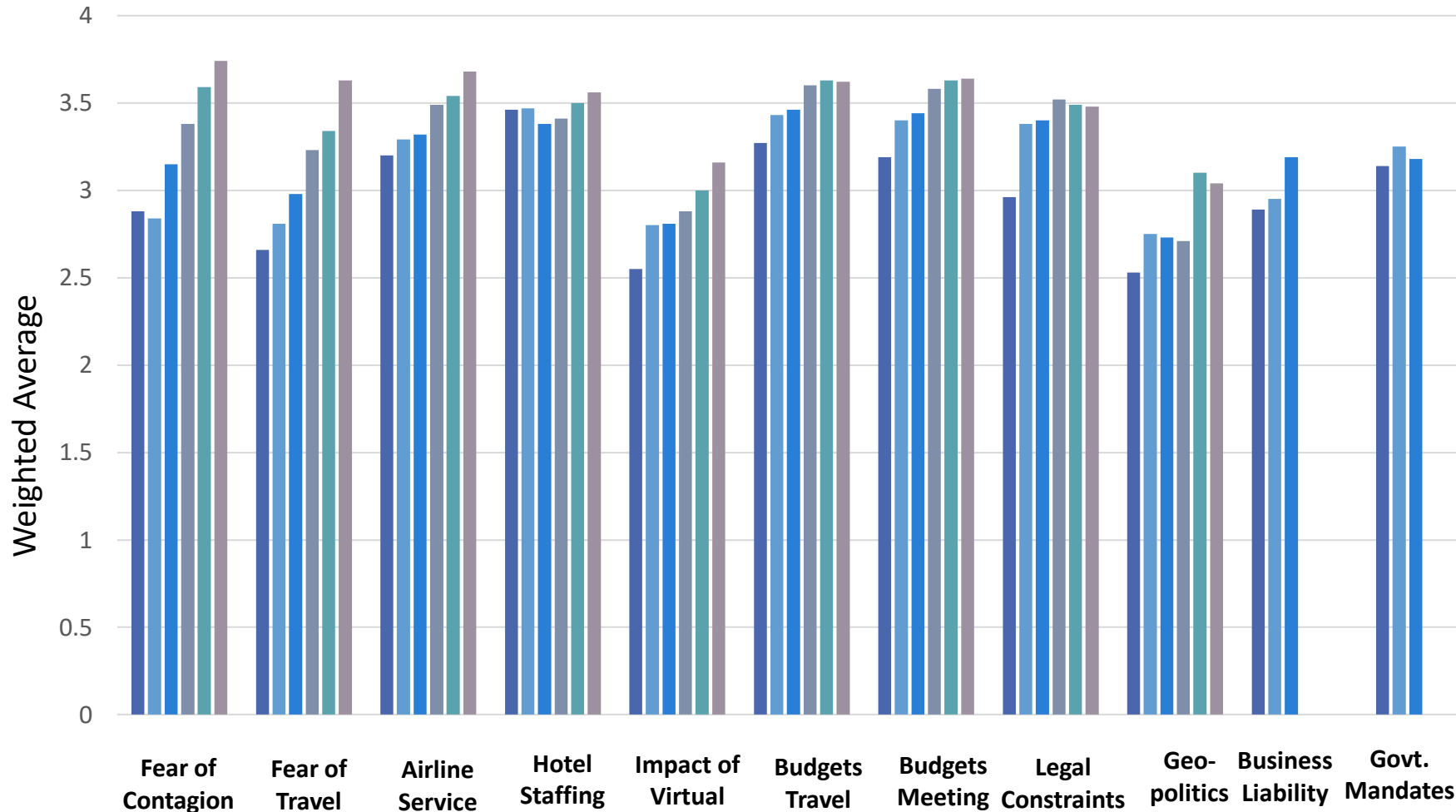
Recovery Remains Complicated as Concerns Persist

Budgets, hotel staffing and government mandates top the list.

Responses (left to right):
 July
 May
 April
 March
 January
 November

For your future in-person or hybrid events, how concerned are you about the following? Rate each on a scale of 1 to 5 (with 1 being "not at all concerned" and 5 being "extremely concerned")

July 7, 2021

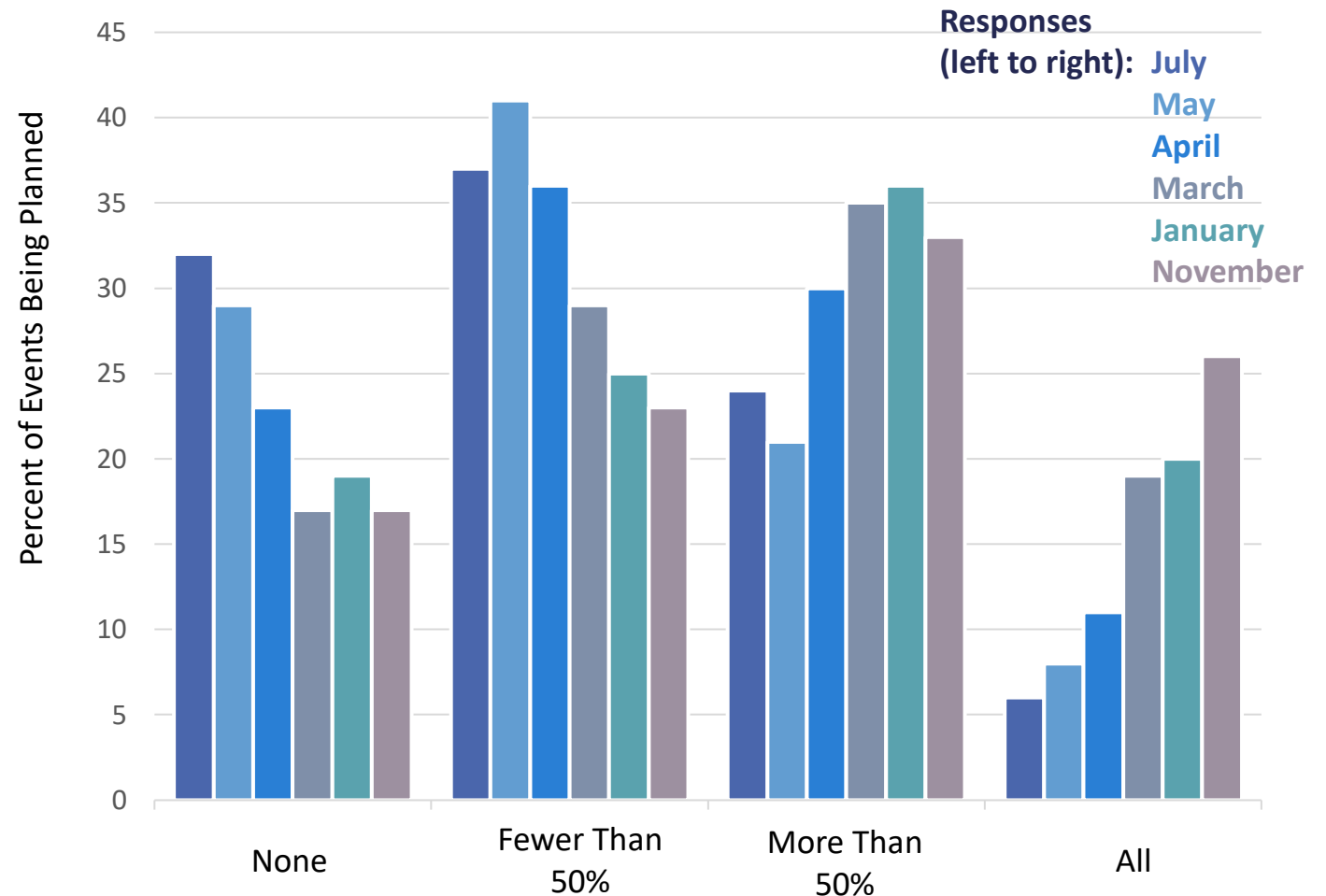


What percentage of the events you are now planning will be online only?



July 7, 2021

With momentum growing for live events, planners are producing online-only events too.



In Summary:

- ✓ More planners are booking new events than are rescheduling events, for the first time since March '20. Have we found the bottom?
- ✓ Hybrid is happening – 40% are currently planning hybrid. Many others demonstrate intent.
- ✓ Hybrid satisfies an immediate need: to accommodate current stakeholders unable to attend a live event.
- ✓ It's "wait and see" for planners not currently planning hybrid. Costs are a concern.
- ✓ The trade-off: Currently, only a small minority of planners will incur increased costs to engage a larger audience via hybrid.
- ✓ Live-event concerns continue to stabilize away from fear of travel and fear of contagion to hotel staffing as the #1 concern.
- ✓ Online-only events have their place. 2 of every 3 planners are still planning them.

Selected Verbatim Comments:

- "Even when Covid is no longer a concern (hopefully that day will come), we will probably continue with hybrid events going forward to allow those to participate who cannot come in person."
- "For Fall 2021 in-person meetings, I'm wondering if other planners are considering "just in case" contingency plans for variants. Will they enforce protocols such as masking, social distancing, etc. for their in-person meetings whether or not local mandates require them?"
- "Our concerns about staffing are both for the venues and the vendors who support our events, and internally, to have the appropriate bandwidth necessary to address the expanded workflows for planning a hybrid event."
- "Hybrid and virtual are here to stay. Hotels and locations will need to adapt to the needs of the meeting architects in order to remain viable business partners."
- "The industry continues to ignore the issues of WHY people in support jobs-- housekeeping, banquets, etc. -- are not returning to work. Where did the "hospitality" go? Elsewhere, I fear."
- "I love the idea of hybrid, but it's challenging for financial, experiential and staff capacity reasons. The idea of non-concurrent engagement is interesting, but it's not fleshed out enough for the virtual experience when using recordings from a live event. Moreover, many of us have been providing prerecorded programming for free to our members and registrants for years."