

PULSE SURVEY

**NEW
DATA**

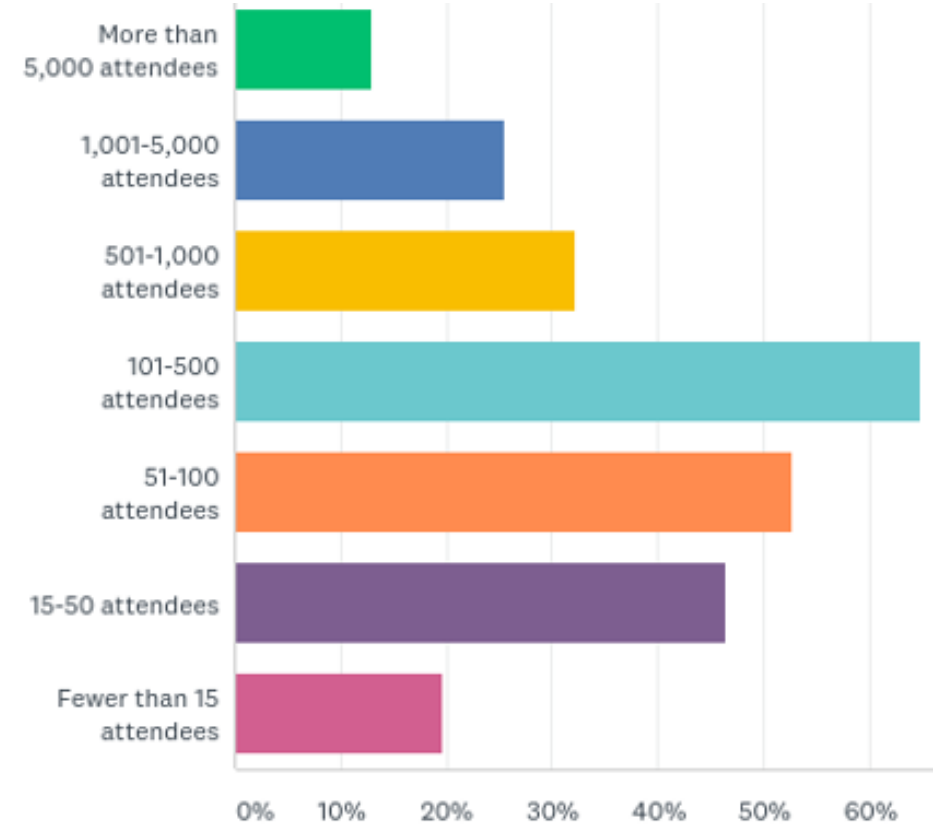
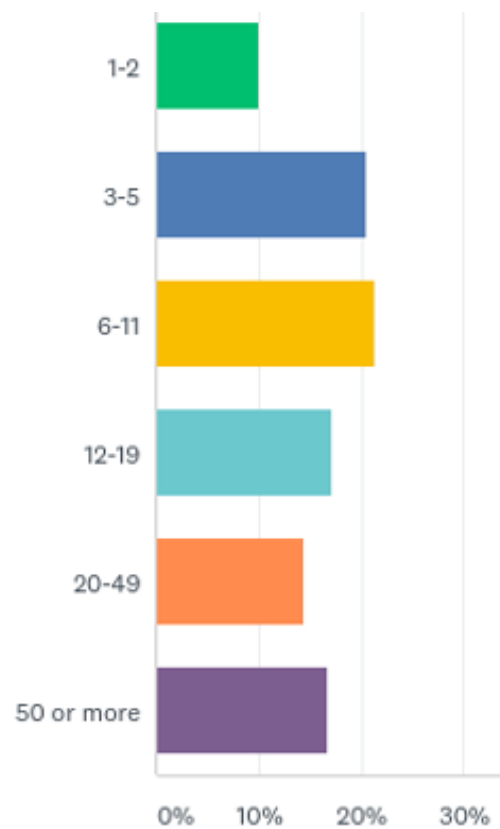
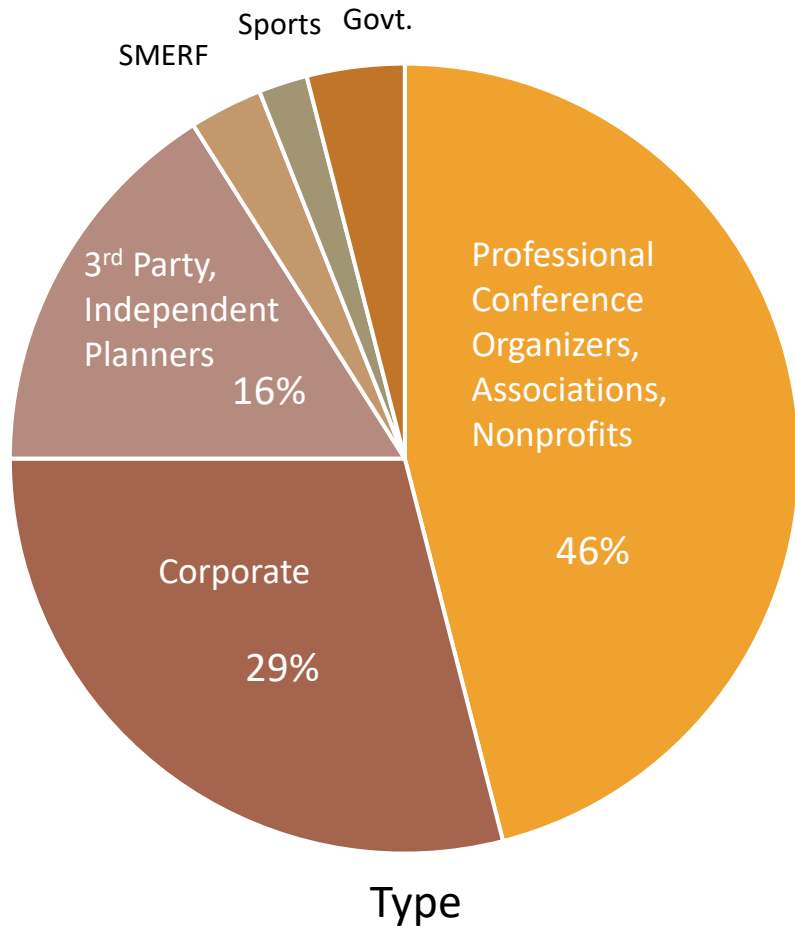
THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19

AUGUST 19, 2021



Respondents by Type, Meetings Volume and Size

826 Valid Planner Responses



New Booking Activity Peaked in July

Though Booking New Events And Sourcing Are Still the Primary Focus

Delta variant prompts focus back to rescheduling, as rebooking activity grows by 40%, from 17% to 24% since July.

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

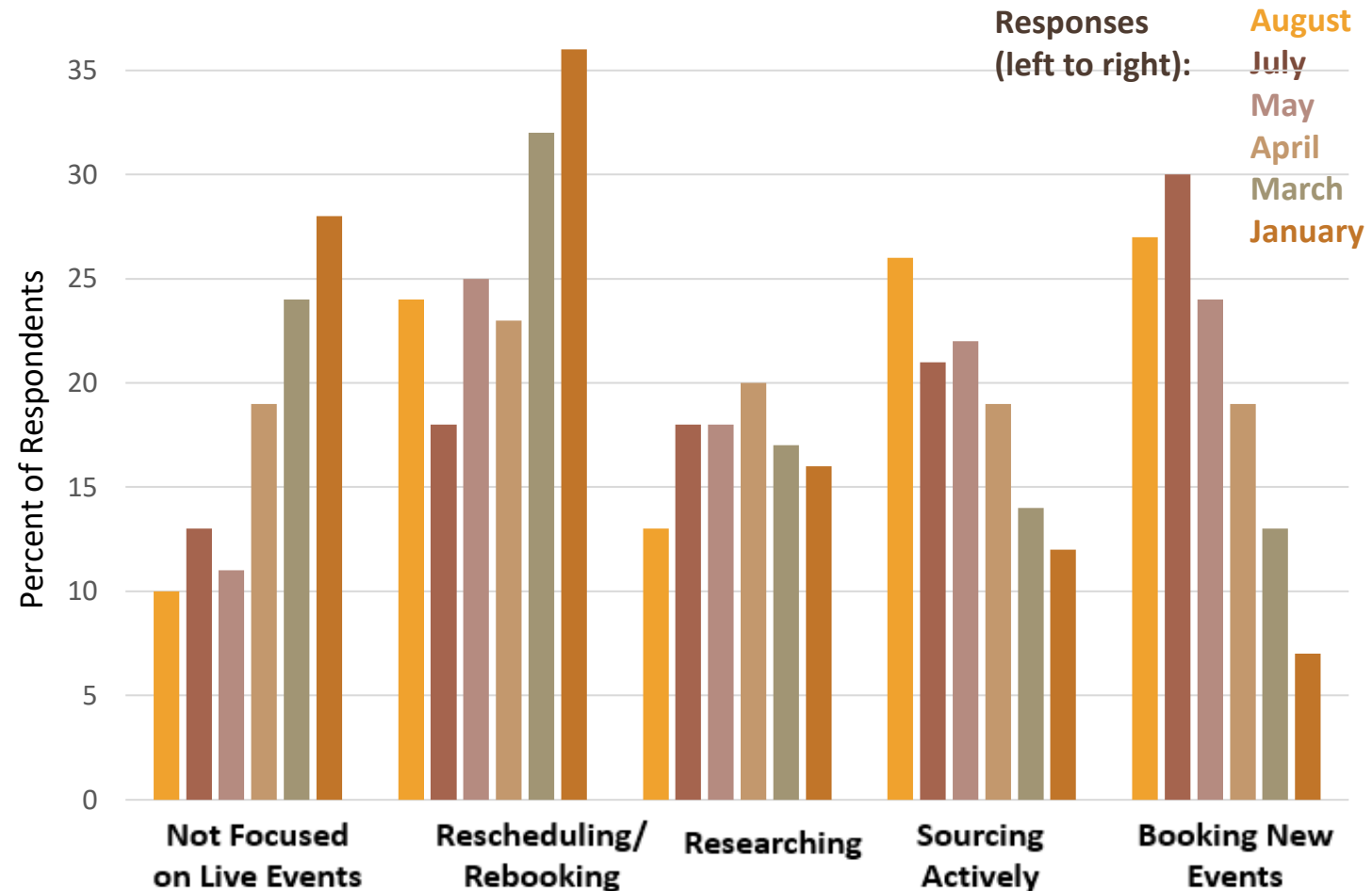
Responses as of August 19, 2021

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

- 24.13%
- 13.31%
- 25.80%
- 27.05%
- 9.71%

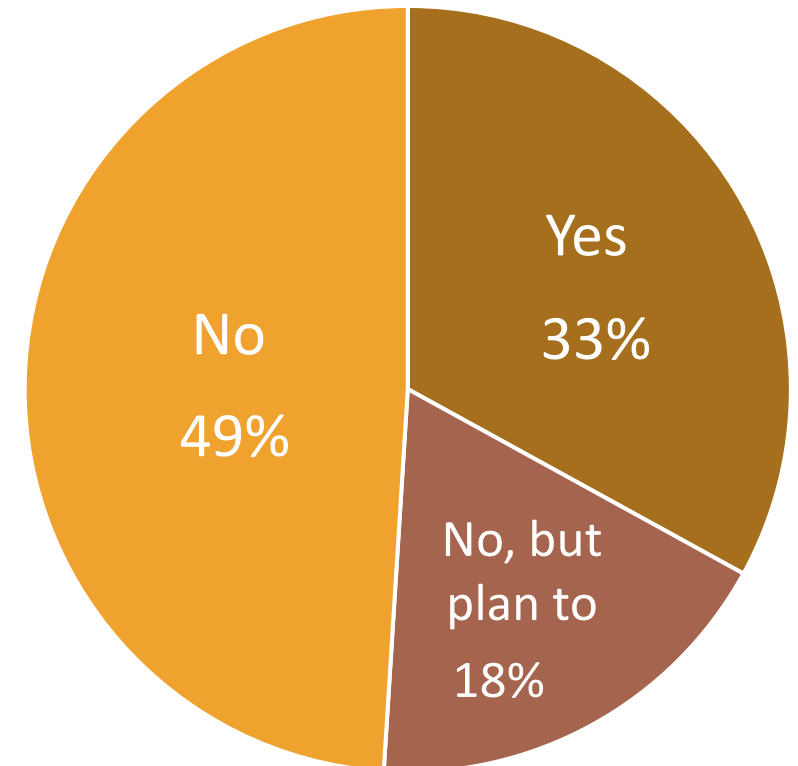


Planners Have Acted Fast As Cases Have Surged Again



*One in three planners
have already
rescheduled, moved
or cancelled their
upcoming events over
the past six weeks.*

Over the past six weeks, have you delayed, rescheduled, moved or cancelled an in-person meeting or event as a result of the increase of Covid-19 cases?

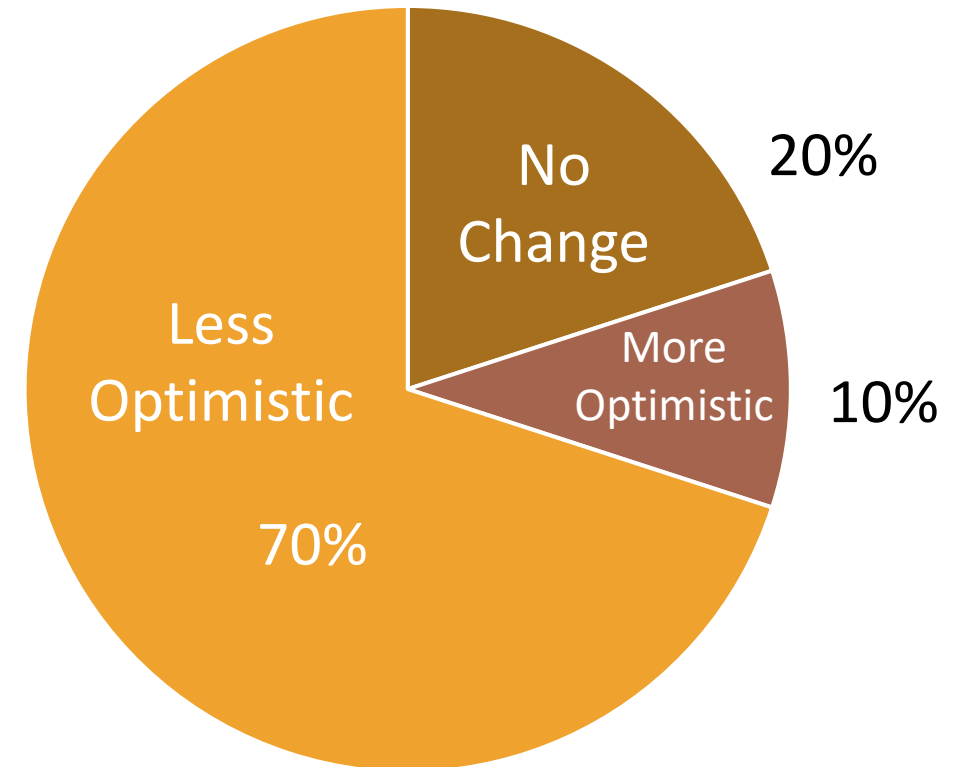


As Cases Rise, Confidence Falls



70% of planners are less optimistic for recovery than they were six weeks ago.

How has your outlook for recovery changed over the past six weeks as a result of the surge in Covid-19 cases?

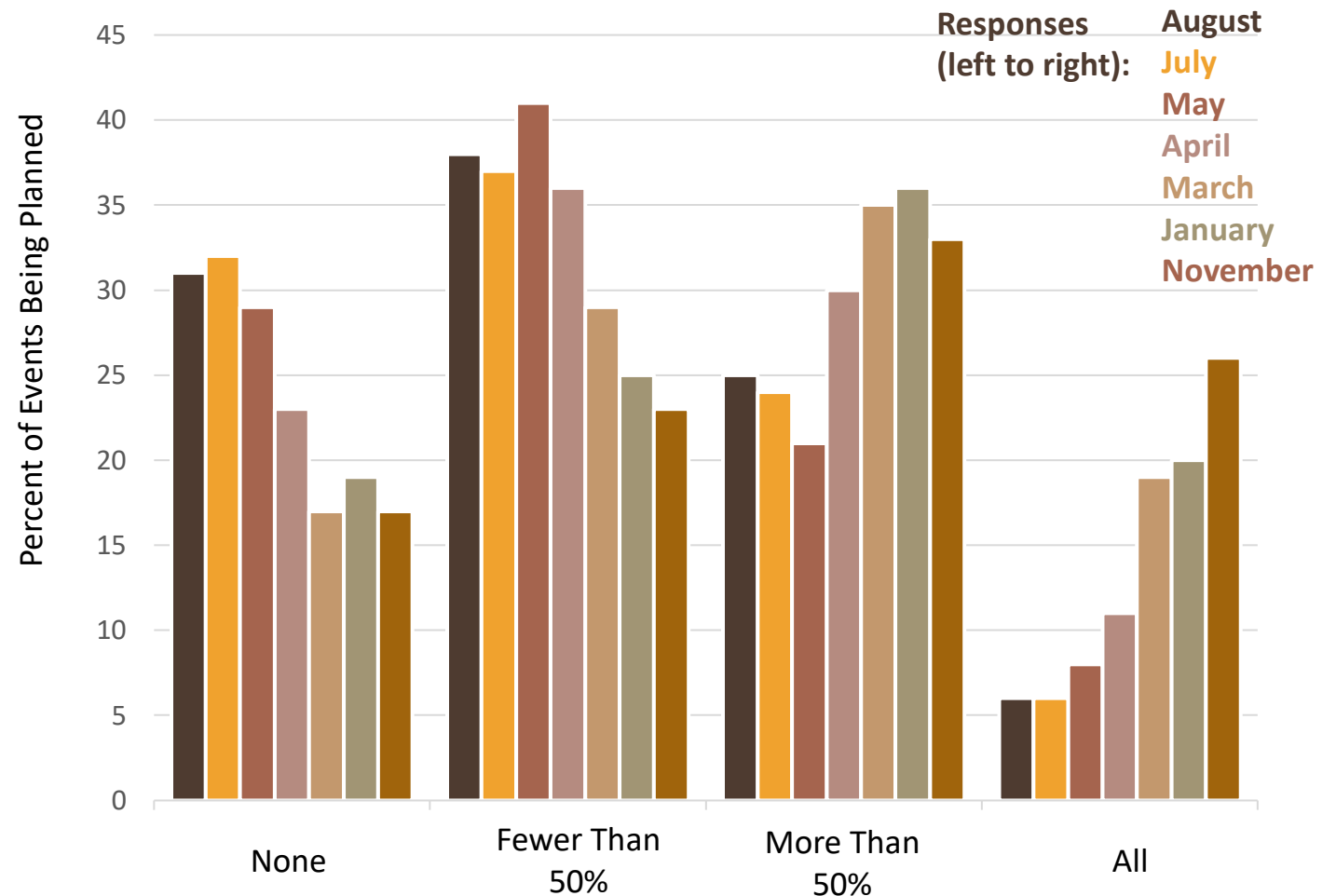


What percentage of the events you are now planning will be online only?



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The latest surge of COVID cases has not spurred renewed interest in online only events.



When's Your Next Live Event?

Notwithstanding Concerns, Planners Remain Hopeful for 2021

- **66% expect their next live event during the back half of 2021, consistent with their Q3/Q4 expectations in May.***

Responses as of May 25, 2021

ANSWER CHOICES	RESPONSES
Q2 2021	25.37%
Q3 2021	31.25%
Q4 2021	25.37%
2022 or later	18.01%

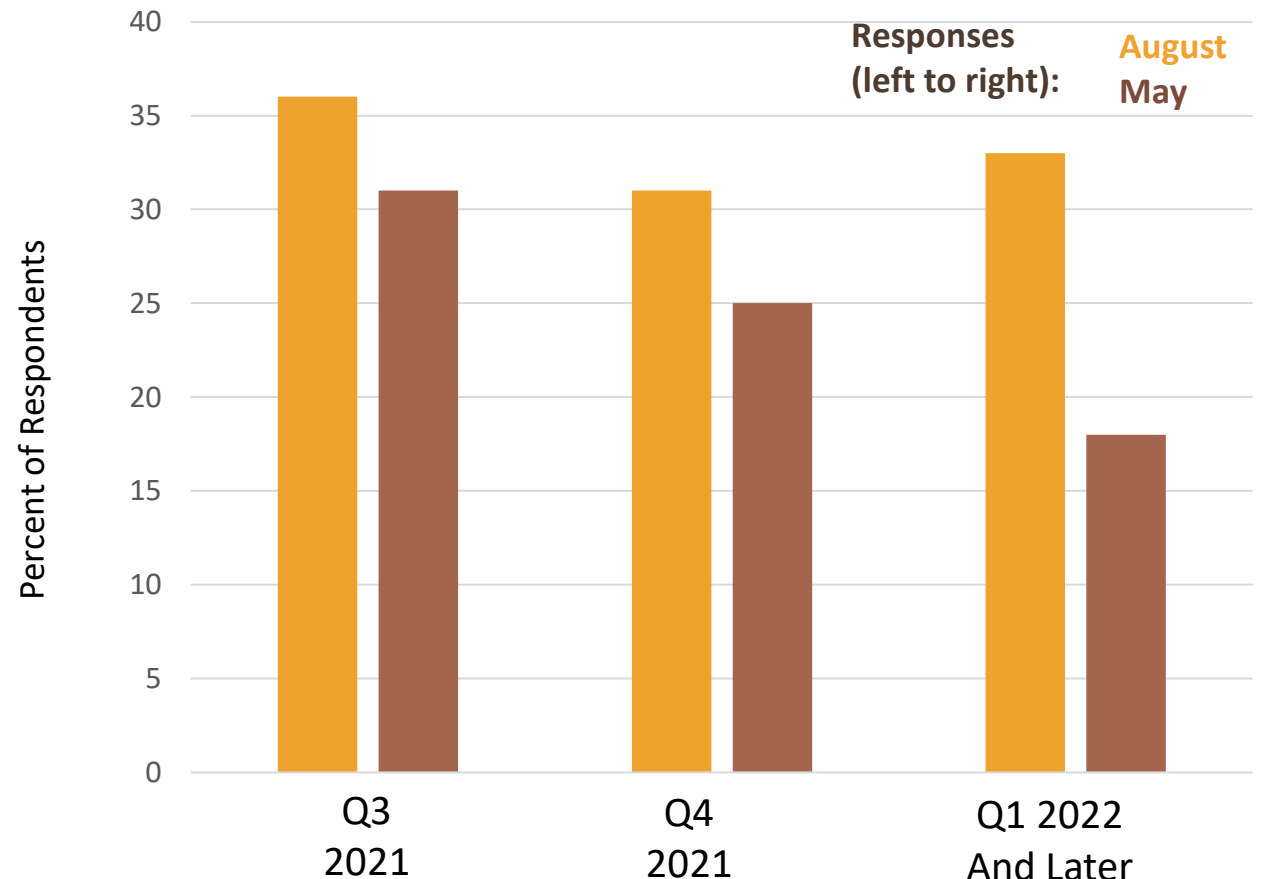
Responses as of August 19, 2021

ANSWER CHOICES	RESPONSES
Q3 2021	36.15%
Q4 2021	31.16%
First half 2022	23.68%
Second half 2022	7.48%
2023 or later	1.52%

* Factoring out the 25% Q2 2021 respondents from the May cycle, Q3/Q4 expectations remain relatively flat; expectations for 2022 and beyond grow from 18% to 24% from the May cycle, as compared to 33% in the August cycle .

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When at the earliest do you expect to hold your next in-person or hybrid meeting or event?

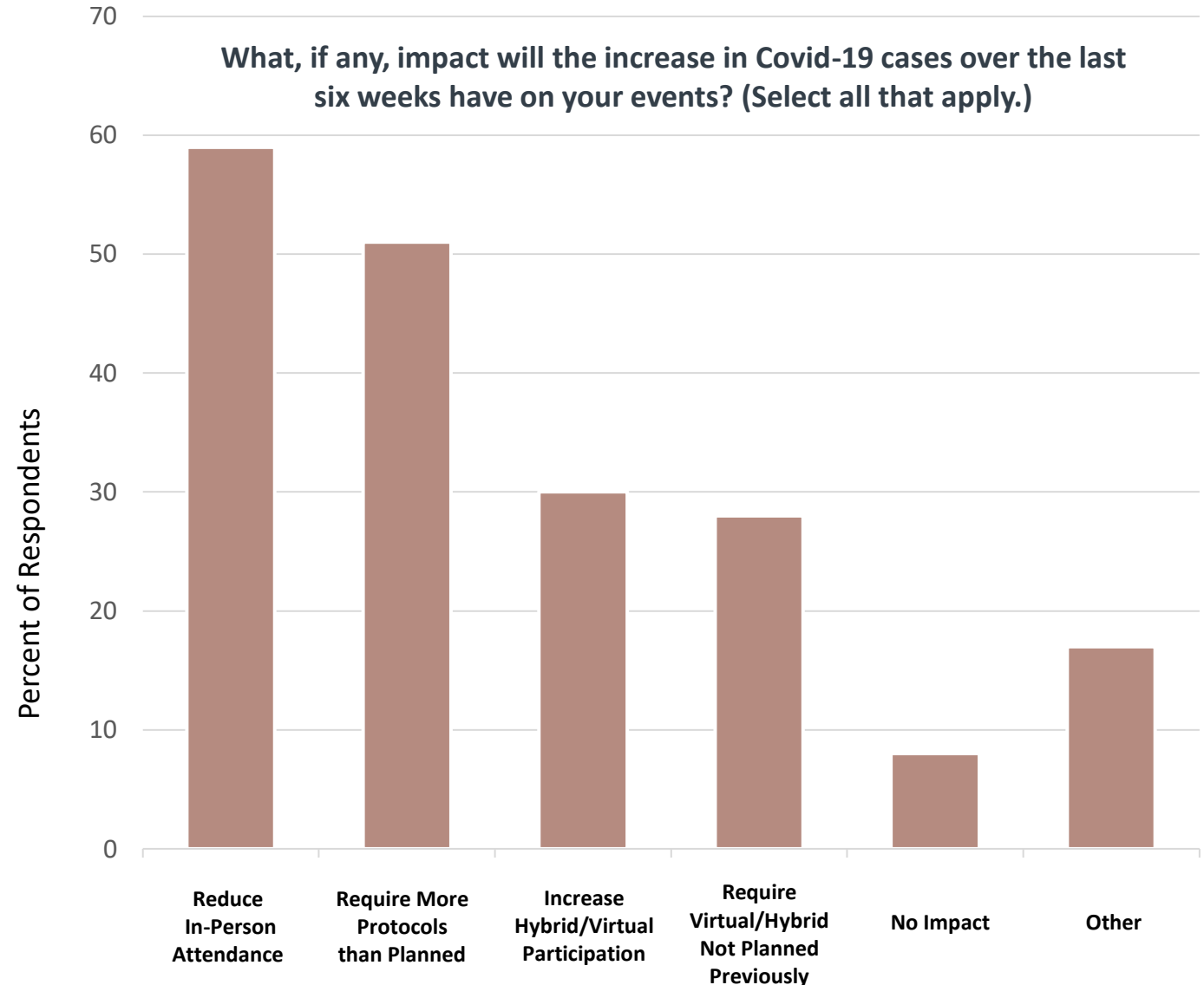


Fewer Attendees, More Rigorous Protocols are Expected

Verbatims indicate shifting to hybrid, moving outdoors, requiring vaccinations and masks, negotiating with hotels -- among other moves -- are being actively considered to avoid another round of cancellations.

ANSWER CHOICES	RESPONSES
Reduce the number of in-person attendees expected	59.00%
Increase participation in the virtual/hybrid component of the event	30.33%
Require a virtual/hybrid component which we had not previously planned	28.25%
Require more rigorous health and safety protocols than previously planned	51.39%
No material impact to our events	8.03%
Other (please specify)	17.17%

August 19, 2021



For Protocols, Most Planners Rely on State and Local Mandates

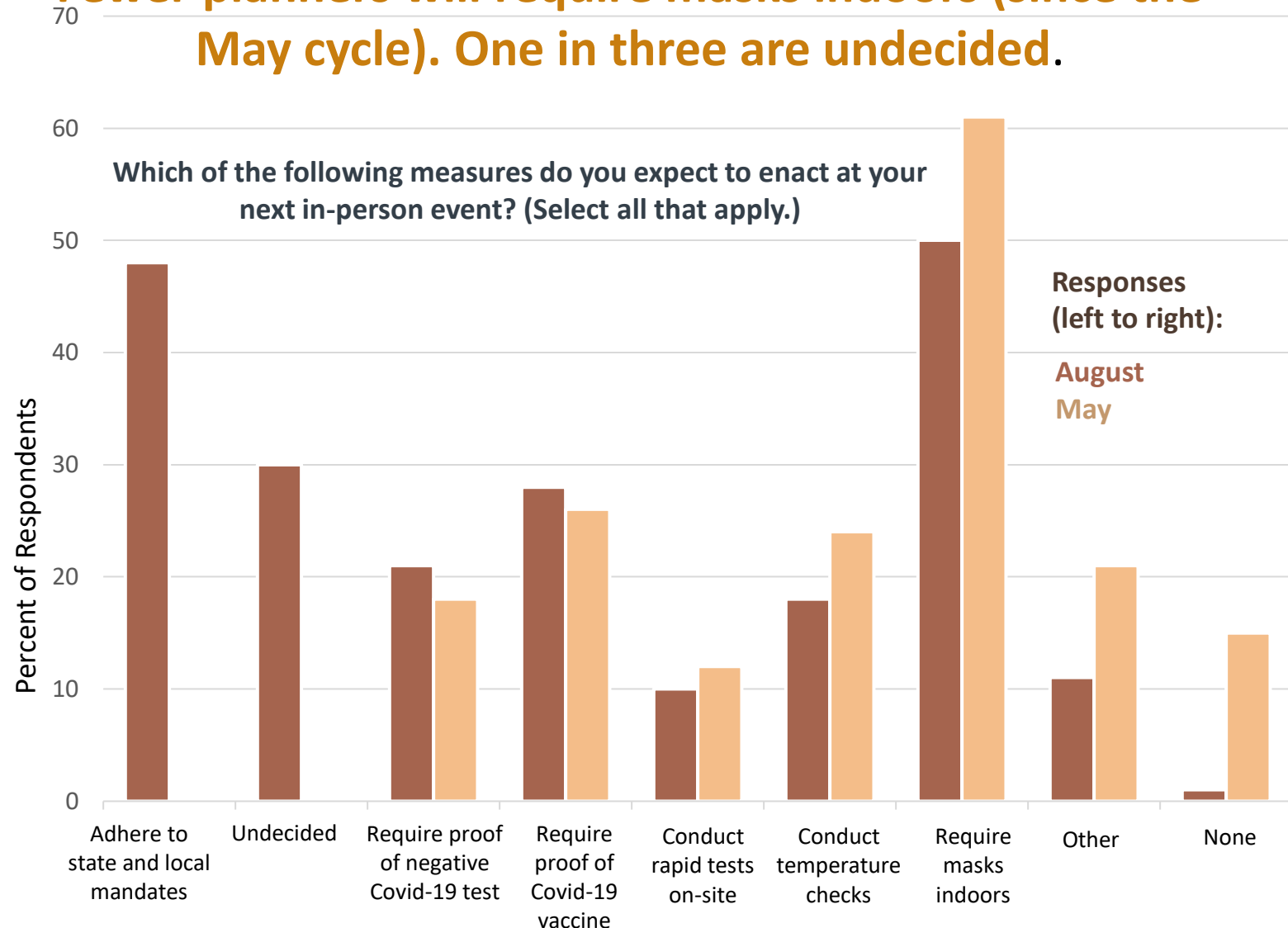
ANSWER CHOICES

RESPONSES

▼ None of the above	0.69%
▼ Require proof of recent negative Covid test	20.94%
▼ Require proof of Covid-19 vaccination	28.16%
▼ Conduct rapid tests on-site	10.26%
▼ Conduct daily temperature checks	18.17%
▼ Require masks indoors	50.07%
▼ Adhere to state and local mandates only	47.85%
▼ Undecided/to be determined	30.37%

August 19, 2021

Fewer planners will require masks indoors (since the May cycle). One in three are undecided.



What's Vexing Planners?

Rates, dates, contract terms and staffing.

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

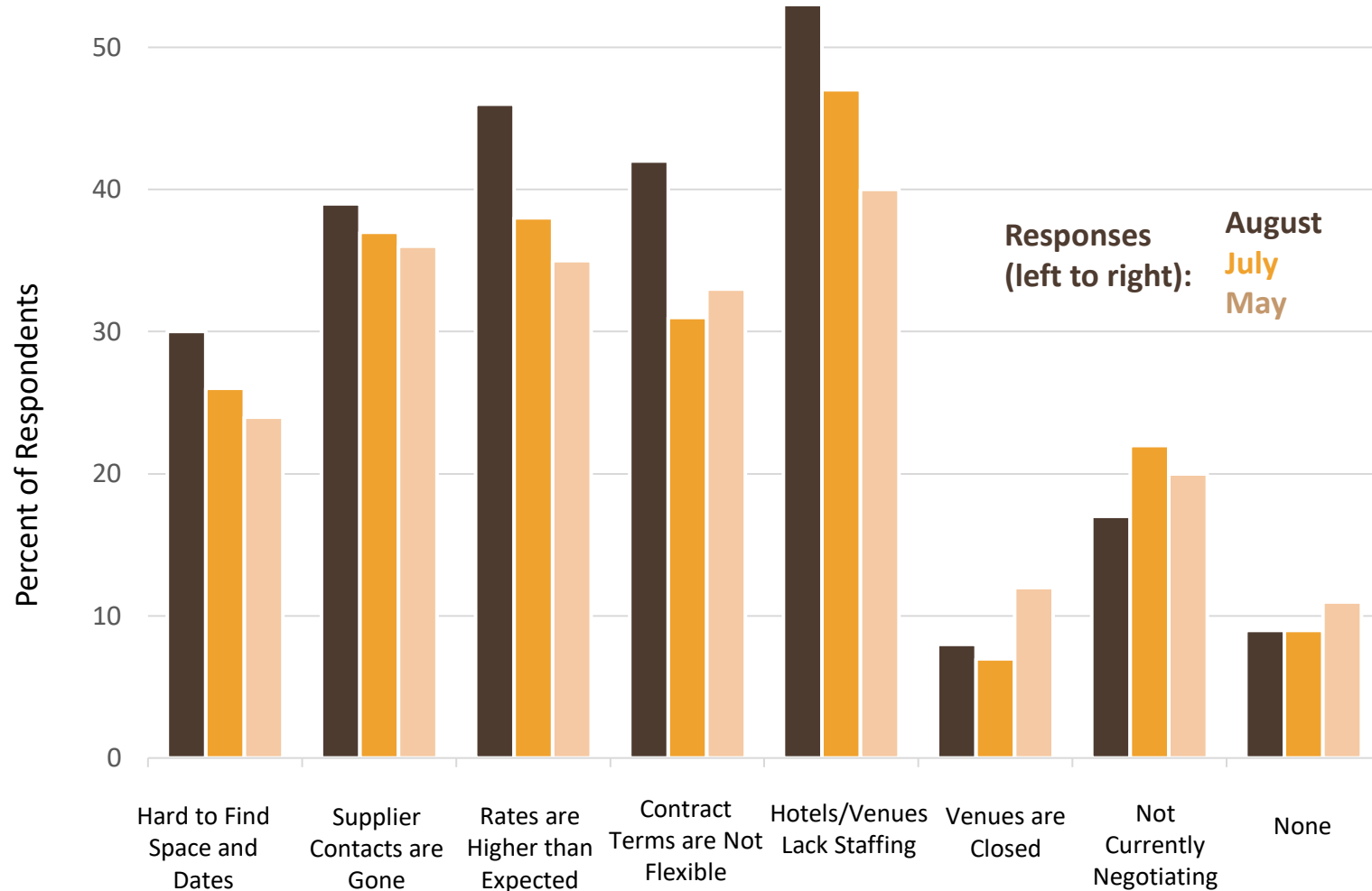
ANSWER CHOICES

- 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

- 9.17%
- 30.42%
- 39.44%
- 46.39%
- 41.81%
- 52.64%
- 8.06%
- 16.81%

August 19, 2021



In Summary:

- ✓ New booking activity peaked in July, but **sourcing activity remains relatively robust** even with increasing concerns over cases.
- ✓ Many **planners acted fast to reschedule**, move or cancel their events over the past six weeks.
- ✓ Growing pessimism for live events is **not translating to Q3/Q4 cancellations – at least not yet.**
- ✓ Neither is growing pessimism translating to any **renewed interest in digital-only events.**
- ✓ Fewer attendees and more rigorous **protocols are expected.**
- ✓ Most planners will rely on **state and local guidelines for safety protocols.**
- ✓ Rates, dates, staffing and contract terms are **challenging planners more than before.**

Selected Verbatim Comments:

- “Over the last 15 months, we have seen that in-person meetings, if handled properly, can be held safely.”
- “We are dual-planning for every in-person event so we can switch to virtual if needed.”
- “The Federal Government needs to expedite the FDA approval of all COVID-19 specific vaccines and make it mandatory for those who travel and participate in gatherings of 20 people or more to be vaccinated.”
- “Covid is a roller-coaster and it makes planning for it extremely tough. We have to remain fluid, and that doesn't always translate well when planning events — especially when changes happen at the last minute.”
- “I feel like fear is driving decision-making right now.”
- “The change in CDC guidance came unexpectedly, and we're having to pivot yet again. Frustration and burnout are running pretty high right now.”
- “We've done business for a year in the digital environment. My hotel partners need to be aware that my sleeping room space is going to decrease but my need for their technology and meeting space is going up. It's not only heads in beds these days. Those heads are sleeping at home.”