

PULSE SURVEY



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

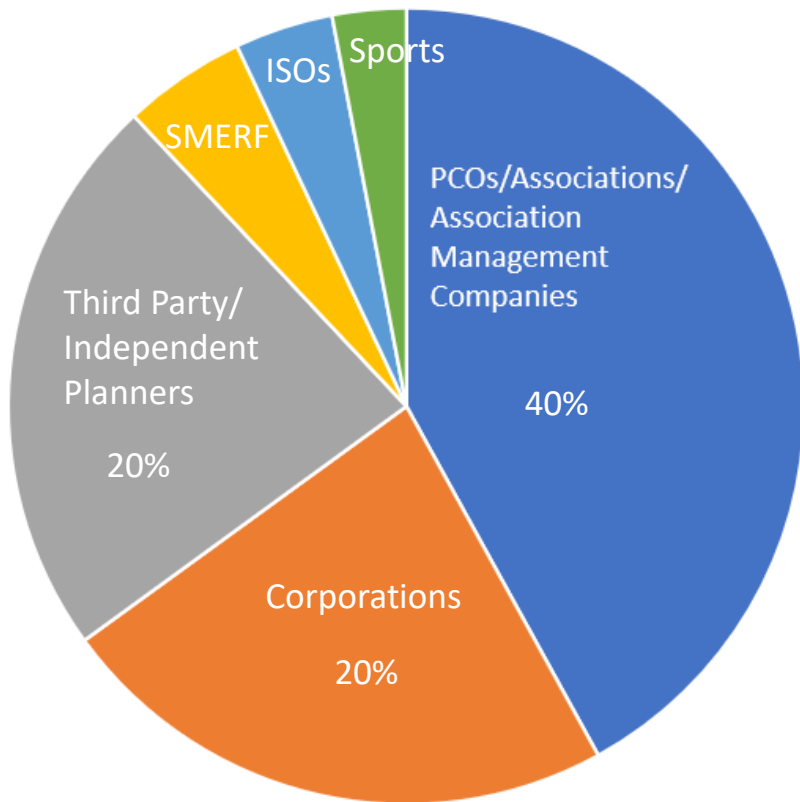
WEDNESDAY, JUNE 17, 2020



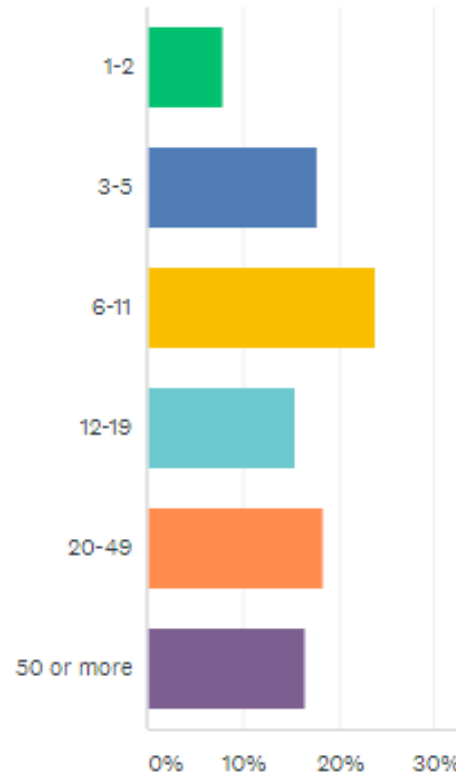
NORTHSTAR
MEETINGS GROUP

Respondents By Type, Volume and Size

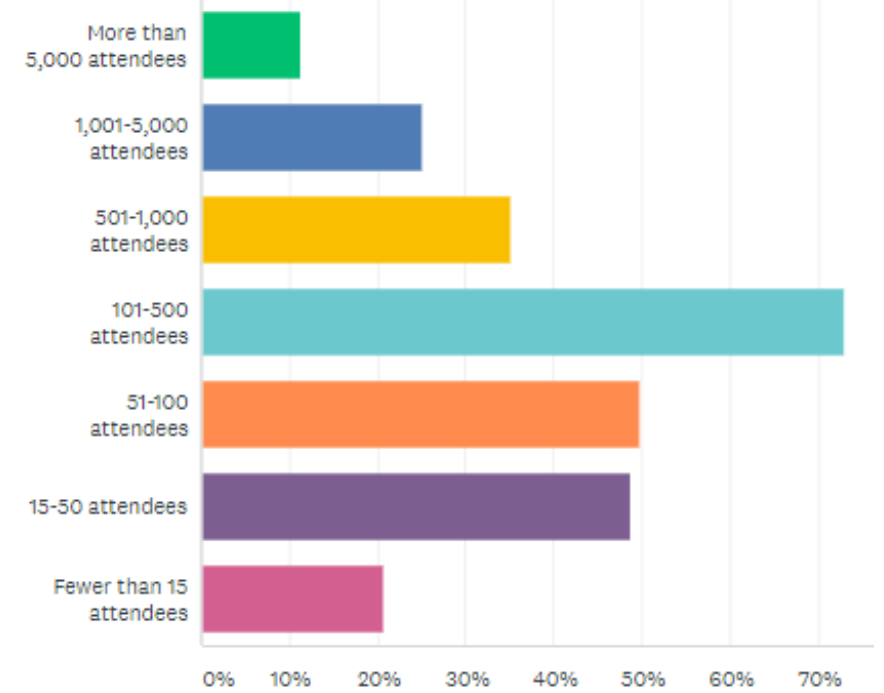
484 Valid Planner Responses



Type

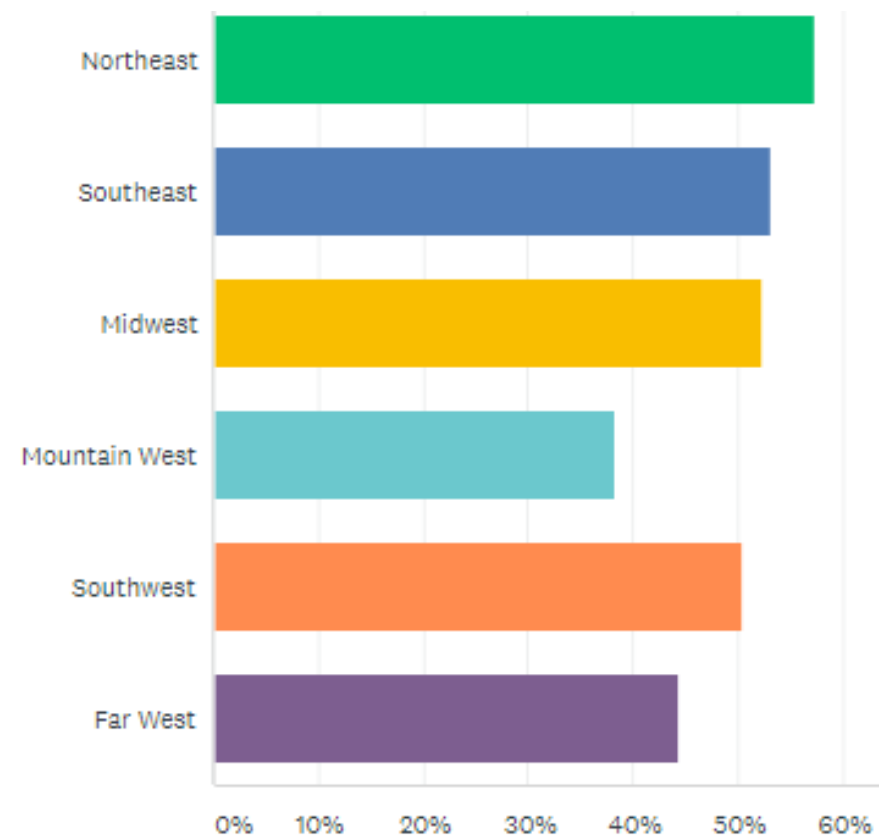
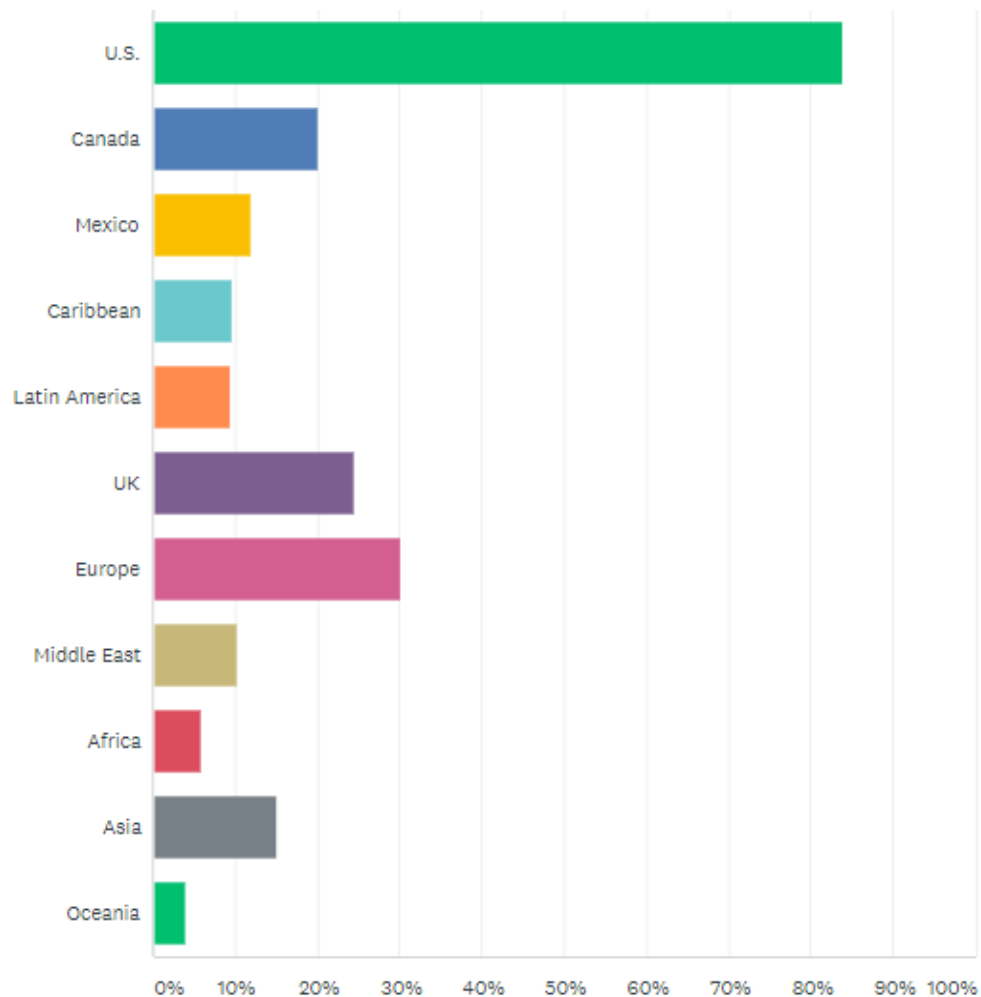


of Meetings



Size of Meeting

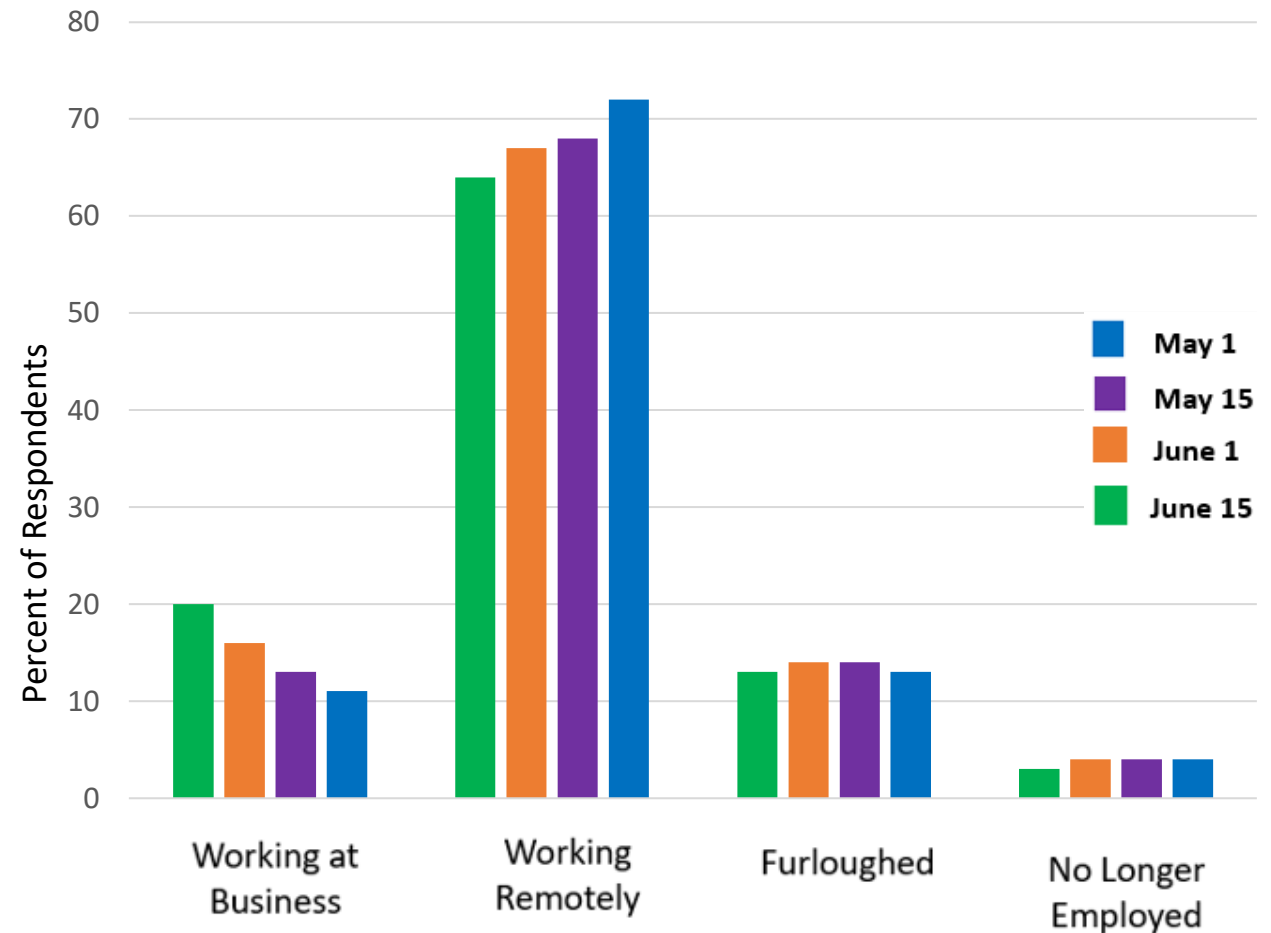
Respondents by Meeting Location



As countries and cities reopen, planners continue to return to their business locations, with 1 in 5 back to their offices

June 15 Responses

ANSWER CHOICES	RESPONSES
Working full time at a business location	20.18% 88
Working full time remotely	64.45% 281
Furloughed, I remain employed but I am now working part-time.	5.96% 26
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	2.75% 12
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	3.90% 17
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	2.52% 11
No longer employed in the job I had prior to March 1, 2020, and I do not intend to seek work in the meetings/events industry.	0.23% 1

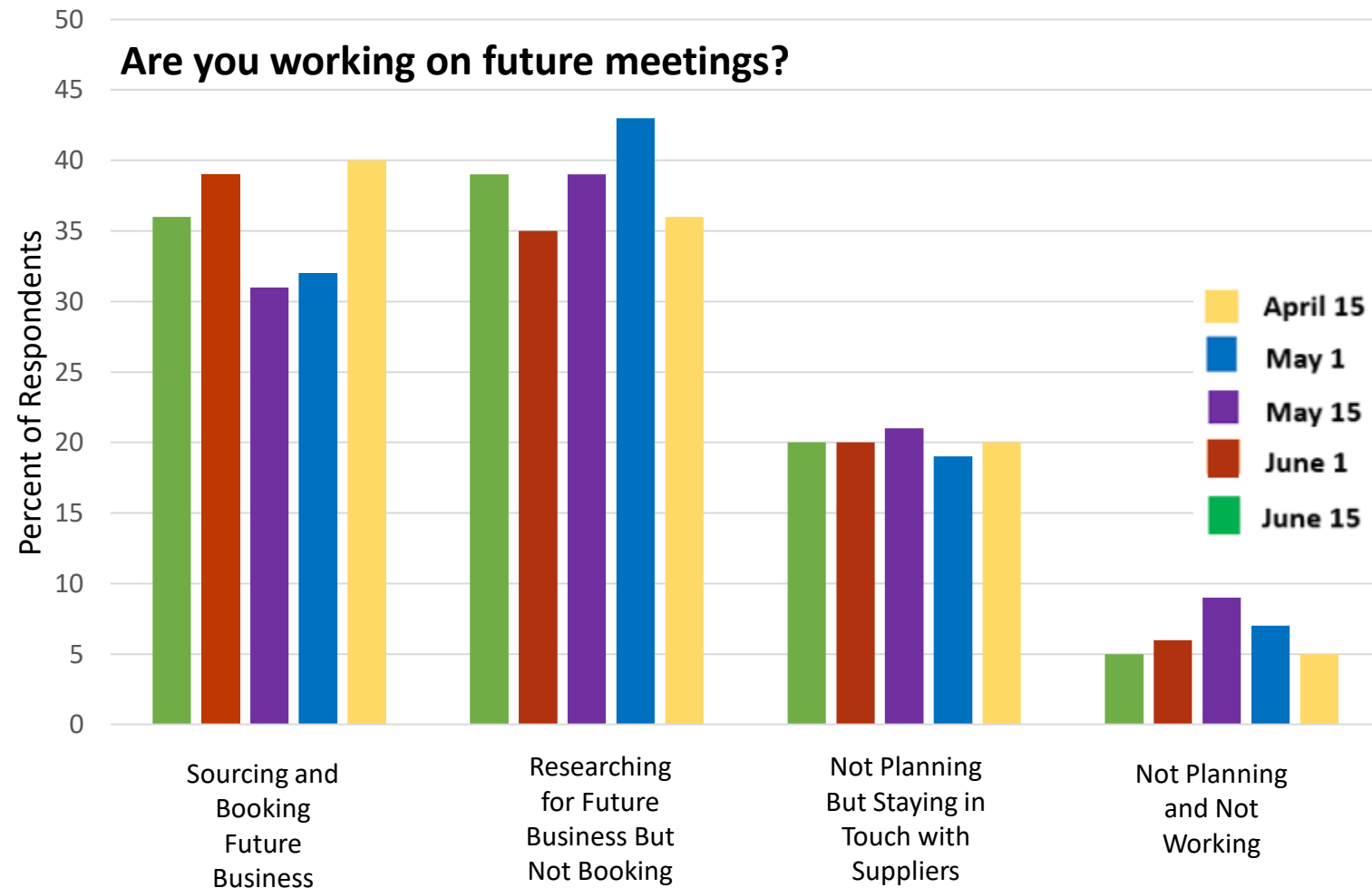


Booking vs. Looking – Hesitancy Remains

Momentum from earlier in the month has slowed over the past two weeks

June 15 Responses

ANSWER CHOICES	RESPONSES
Yes, sourcing and booking future business	35.61%
Researching for future meetings but not booking	39.17%
Not planning, but staying in touch with destination and venue partners	20.18%
Not planning and not staying in contact at this point	3.86%
Not employed	1.19%

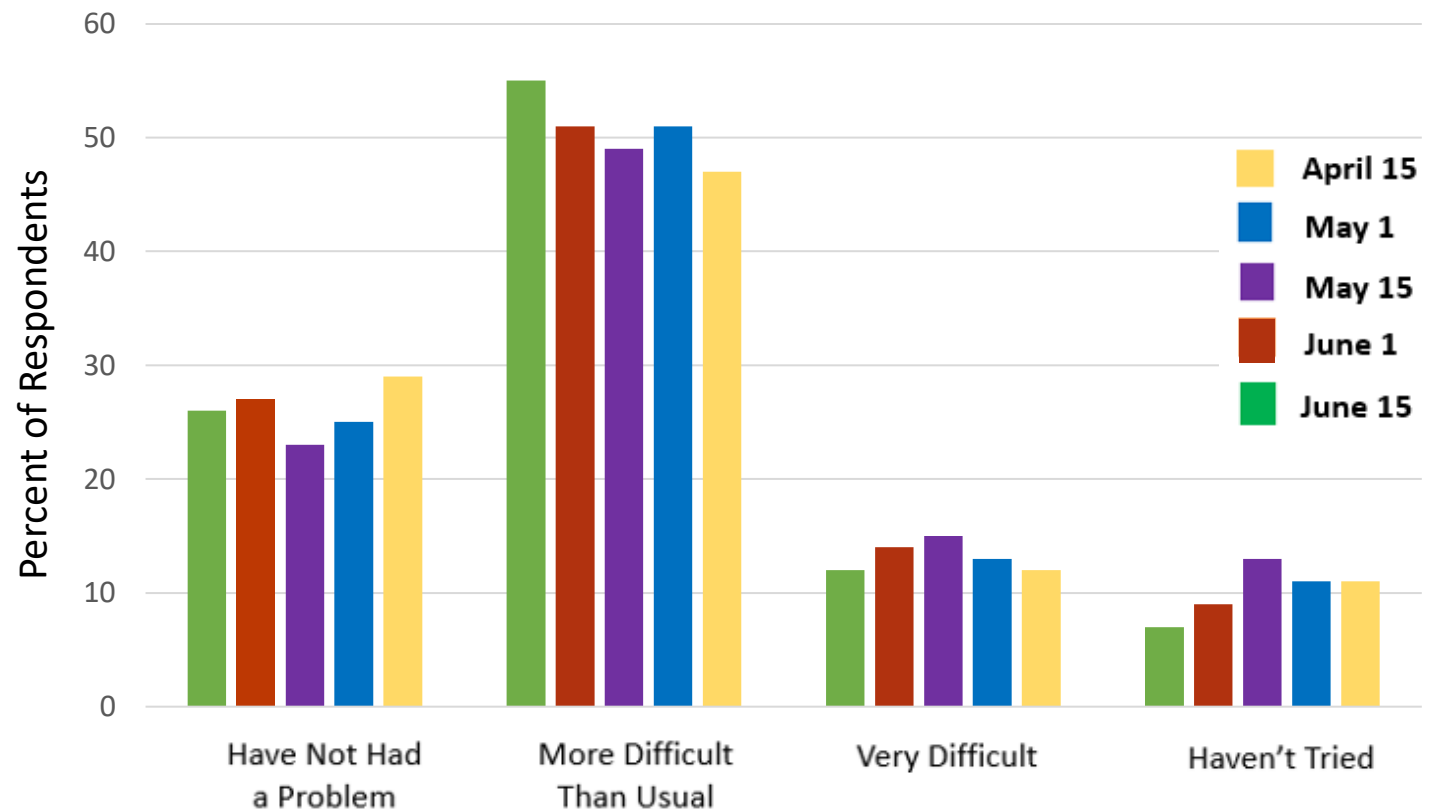


As more planners reach out to suppliers, more report difficulties

What is your current experience in reaching out to suppliers of meeting services?

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ I have not had a problem.	25.89%
▼ It has been more difficult than usual.	55.36%
▼ It has been very difficult.	11.61%
▼ I haven't tried.	7.14%

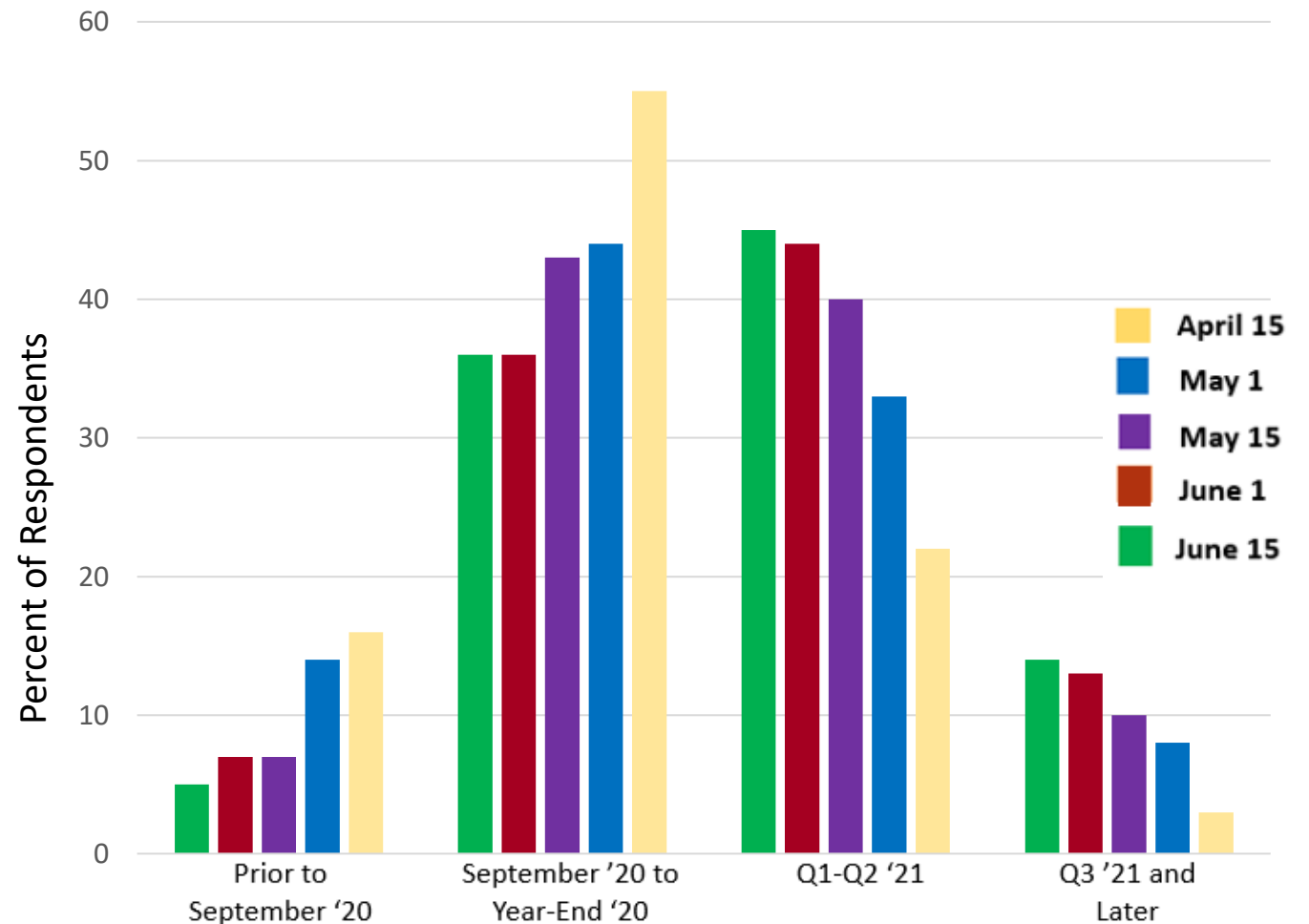


4 in 10 planners expect to actualize rescheduled events before year-end

When is the earliest you are scheduling RESCHEDULED meetings and events?

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ Prior to September 2020	5.09%
▼ September to Year-End 2020	35.63%
▼ Q1 2021	26.35%
▼ Q2 2021	18.56%
▼ Q3 2021	8.98%
▼ Q4 2021	2.69%
▼ Q1 2022 and later	2.69%
TOTAL	

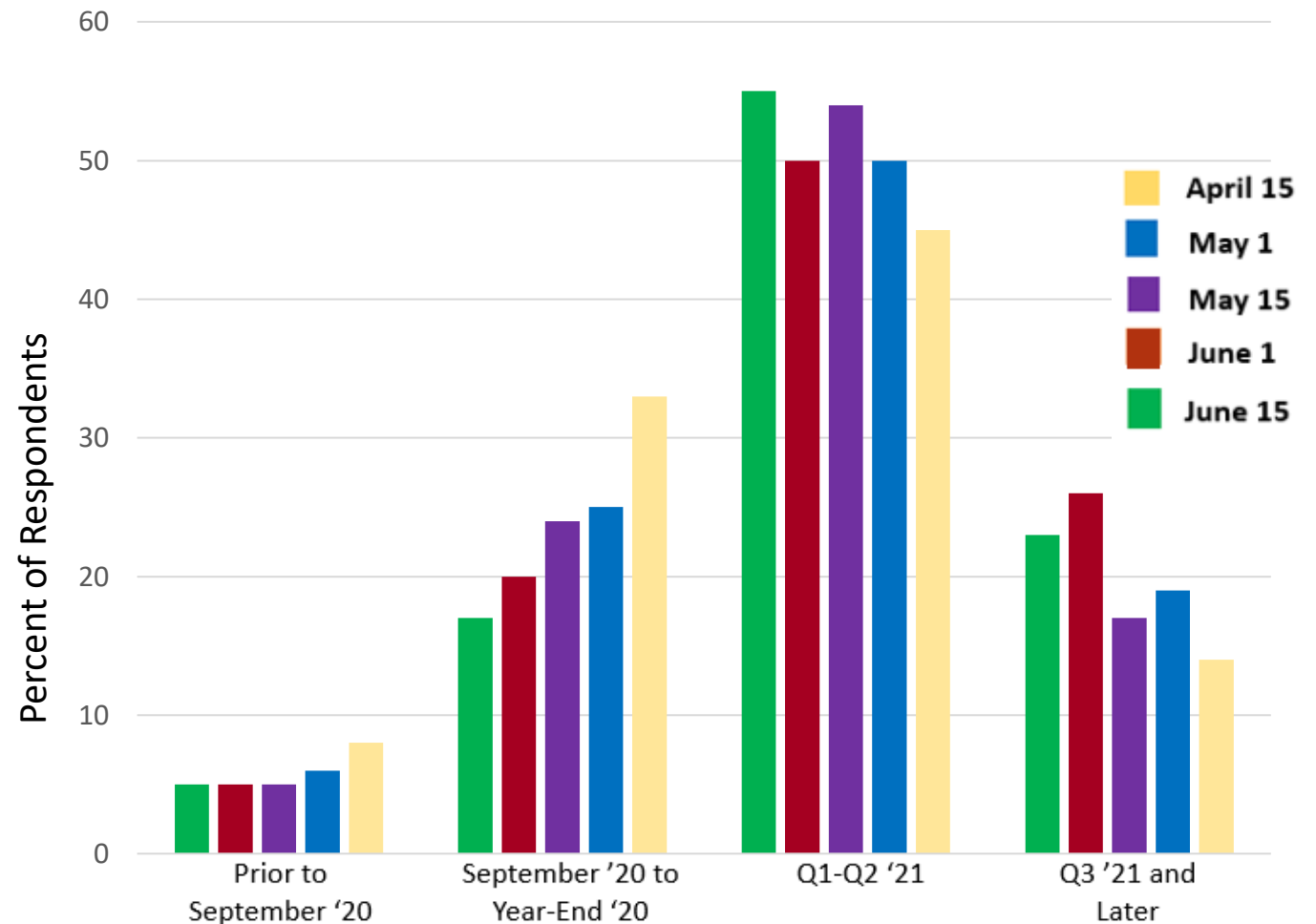


Four out of every five planners are looking to 2021 and beyond for their new events

When is the earliest you are scheduling NEW meetings and events?

June 15 Responses

ANSWER CHOICES	RESPONSES
▼ Prior to September 2020	4.78%
▼ September to Year-End 2020	16.42%
▼ Q1 2021	38.21%
▼ Q2 2021	17.61%
▼ Q3 2021	9.55%
▼ Q4 2021	3.28%
▼ Q1 2022 and later	10.15%
TOTAL	

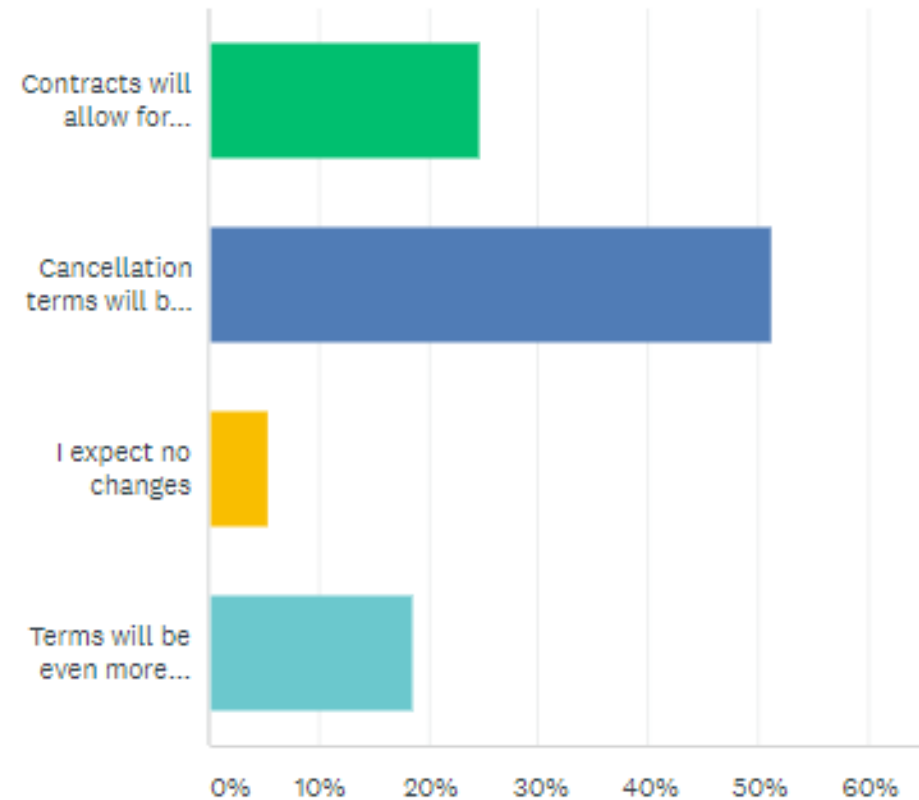


Planners are increasingly sanguine about contracts and cancellation terms

What are your expectations regarding cancellation clauses?

June 15 Responses

ANSWER CHOICES	RESPONSES	
▼ Contracts will allow for cancellation without penalty	24.63%	83
▼ Cancellation terms will be more forgiving	51.34%	173
▼ I expect no changes	5.34%	18
▼ Terms will be even more stringent	18.69%	63
TOTAL		337

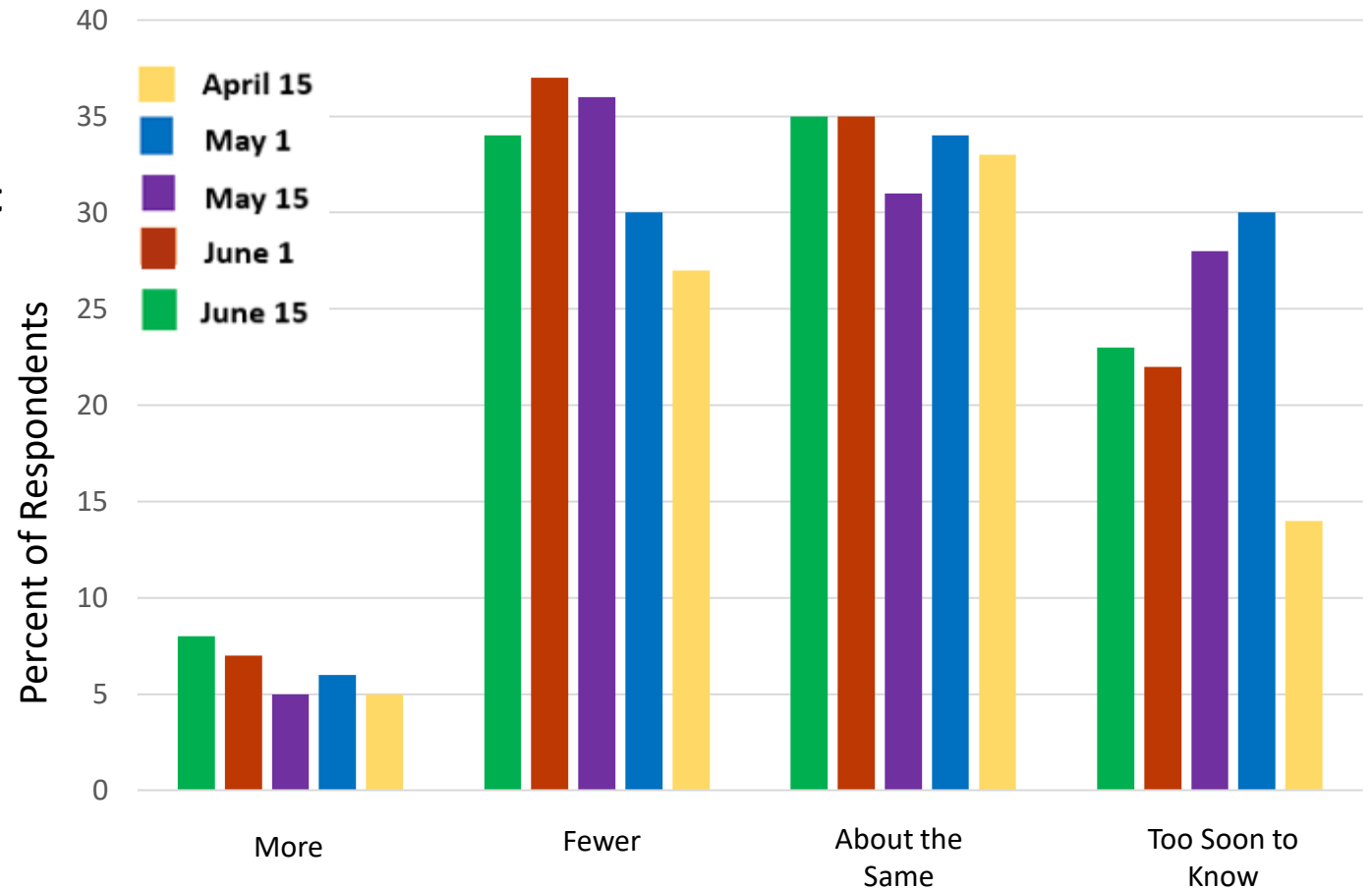


1 in 3 planners believe they'll plan fewer events post-COVID-19, though that number continues to decline

Once the threat of COVID-19 has passed, over the next 12-18 months, will you plan more or fewer meetings?

June 15 Responses

ANSWER CHOICES	RESPONSES
More	7.99%
Fewer	33.73%
About the same	35.21%
It's too soon to know.	23.08%
TOTAL	



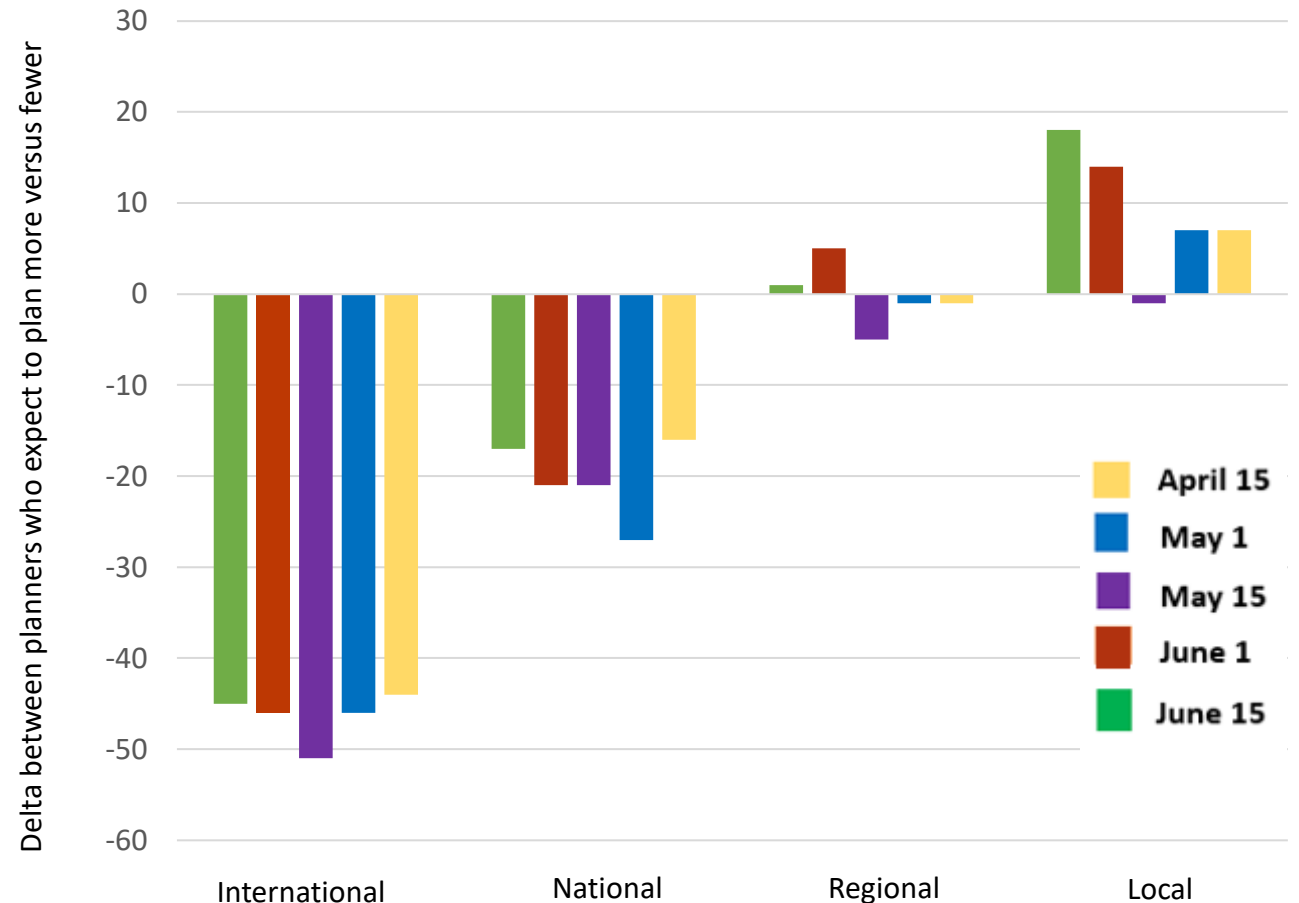
Will you plan more or fewer?

Planners are bullish for local events, as prospects improve from previous lows overall

Once the threat of COVID-19 has passed, will you plan more or fewer meetings over the next 12-18 months?

June 15 Responses

	MORE	FEWER
International	5.56% 11	51.01% 101
National	11.91% 33	29.24% 81
Regional	24.51% 62	24.51% 62
Local	35.71% 80	17.41% 39

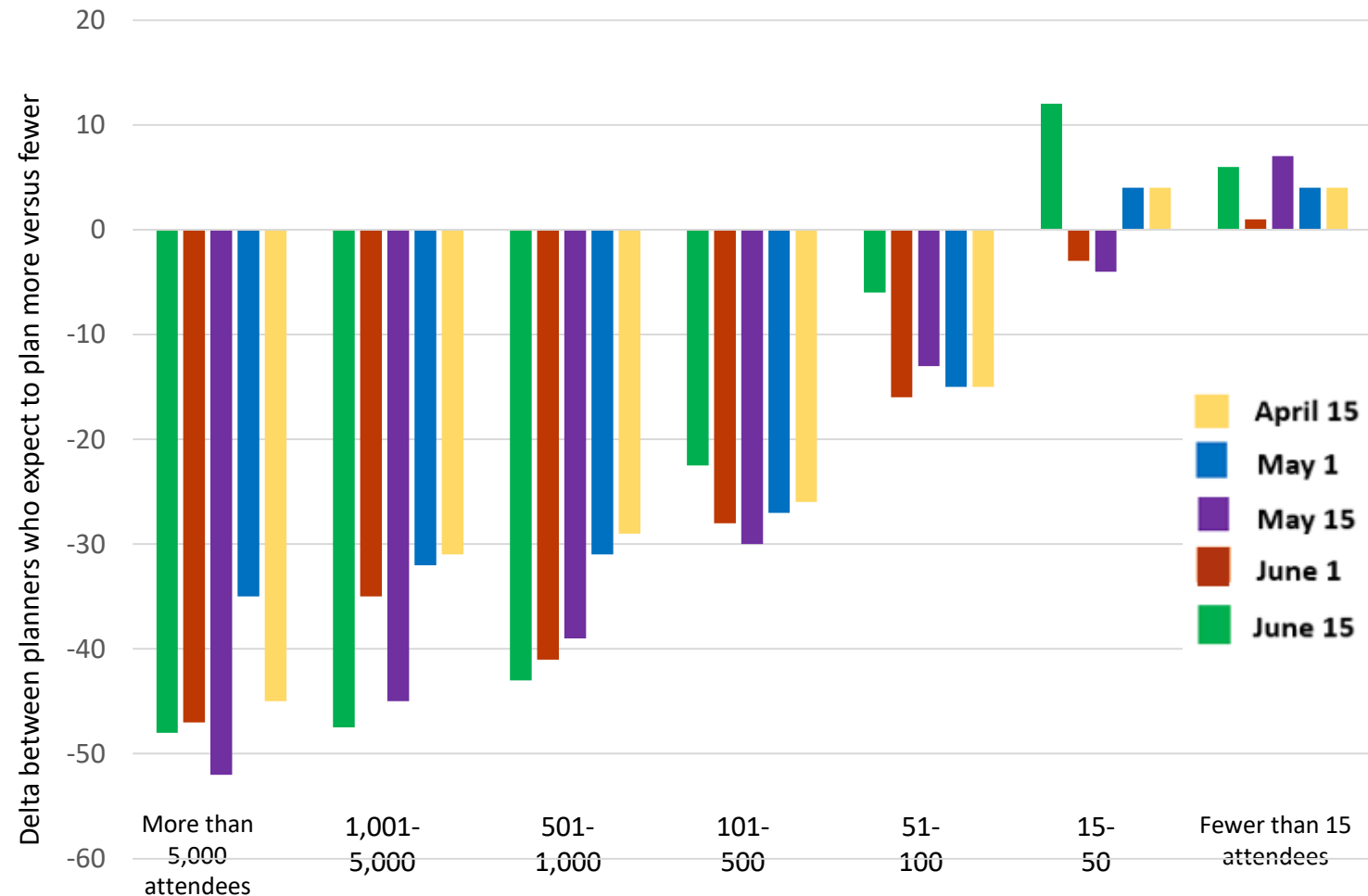


“Sweet spot” for post-COVID-19 meetings? 100 attendees or less

Once the threat of COVID-19 has passed, will you plan more or fewer meetings over the next 12-18 months?

June 15 responses

	MORE	FEWER
More than 5,000 attendees	3.70% 3	51.85% 42
1,001-5,000 attendees	3.33% 4	50.83% 61
501-1,000 attendees	4.88% 8	48.17% 79
101-500 attendees	9.64% 27	32.14% 90
51-100 attendees	19.54% 51	25.29% 66
15-50 attendees	29.34% 76	17.76% 46
Fewer than 15 attendees	26.51% 44	20.48% 34

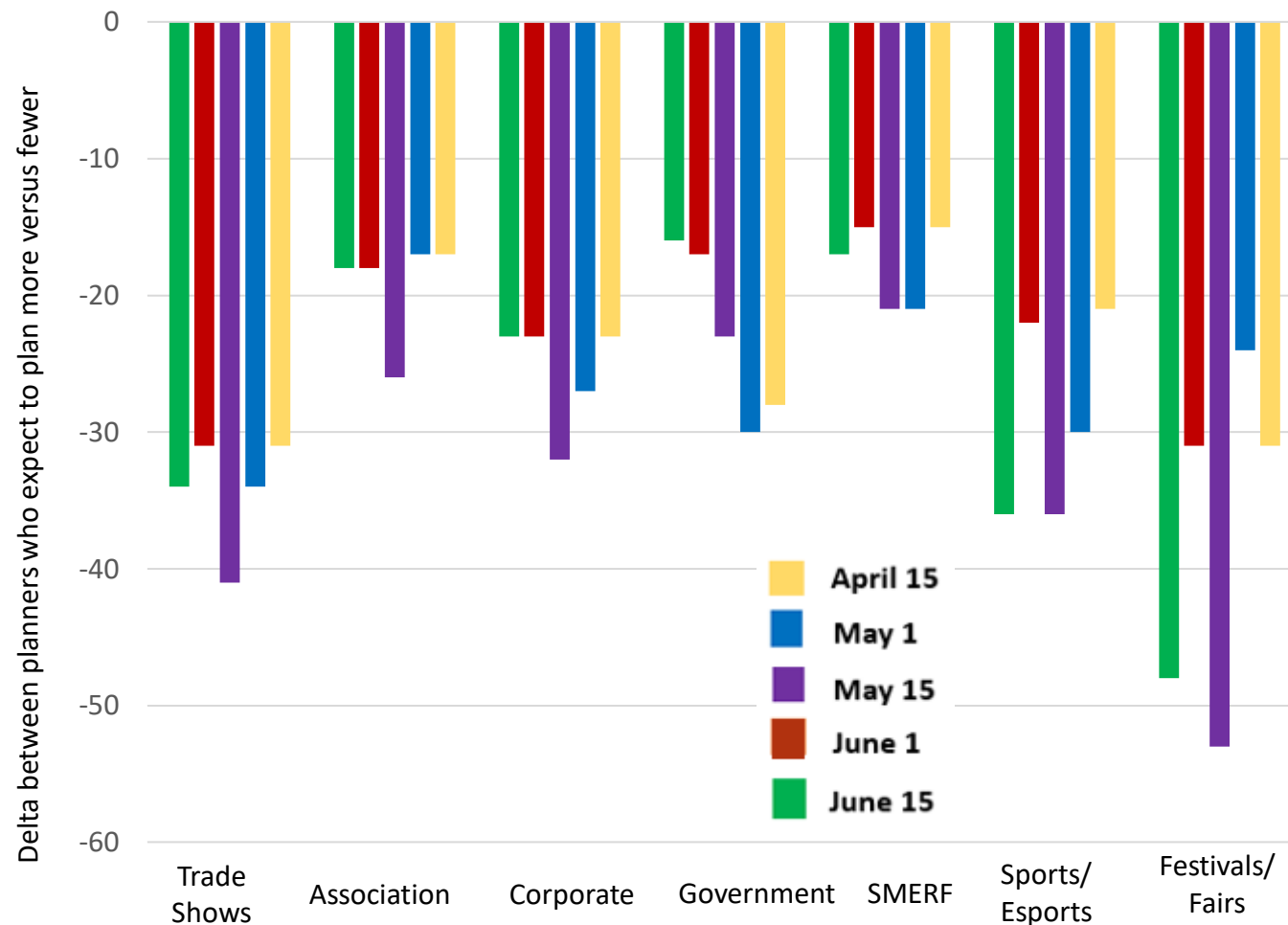


Associations, Government, Corporate: If they can meet, they more likely will

Once the threat of COVID-19 has passed, will you plan more or fewer events over the next 12-18 months?

June 15 Responses

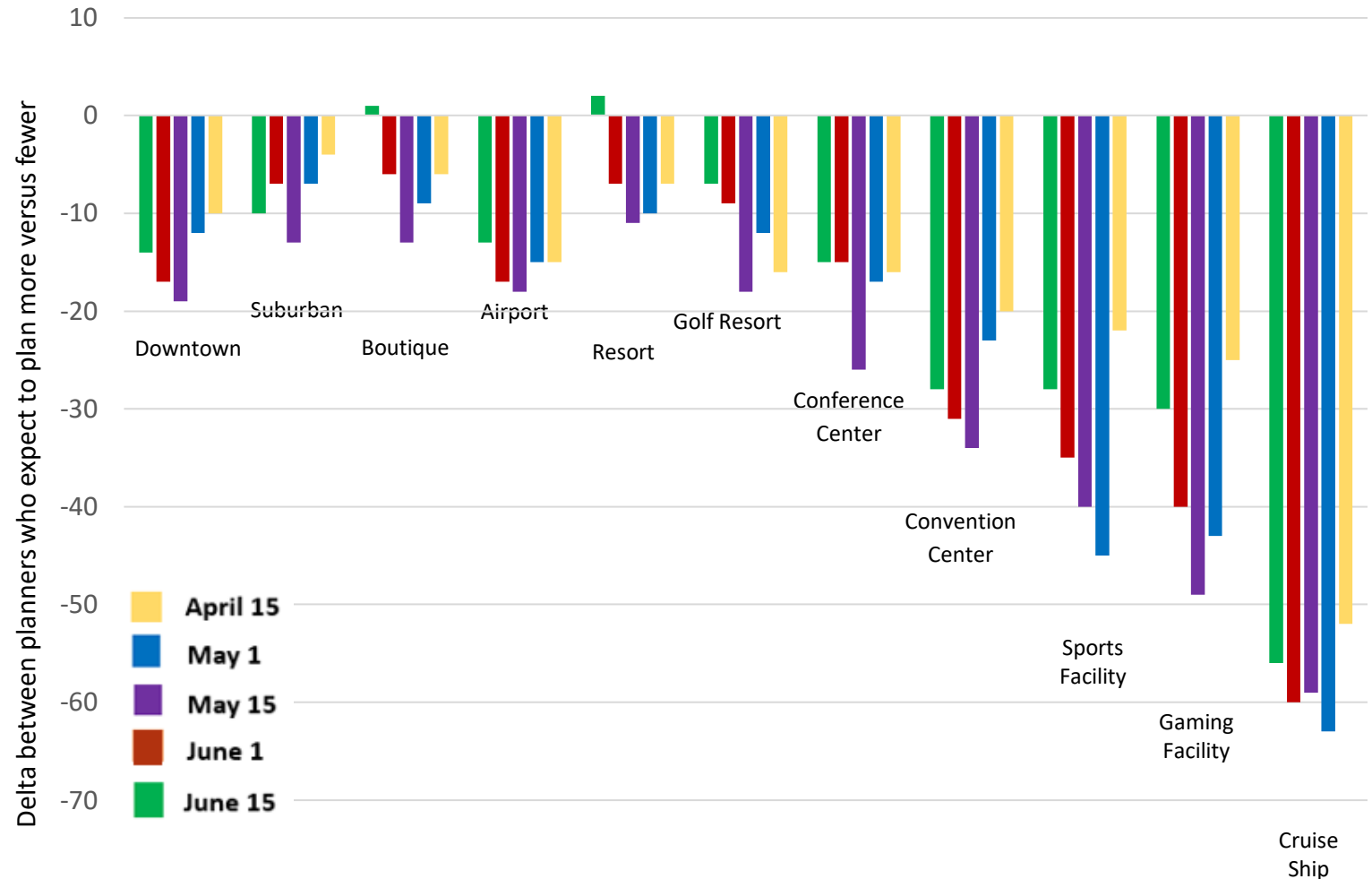
	MORE	FEWER
Trade Shows/Exhibitions/Congresses	5.63% 9	40.00% 64
Association	4.71% 8	22.94% 39
Corporate	9.95% 20	33.33% 67
Government	14.71% 10	30.88% 21
Social, Military, Education, Religion, Fraternal	15.58% 12	32.47% 25
Sports/Esports	13.21% 7	49.06% 26
Festivals/Fairs	1.92% 1	50.00% 26



Are we seeing the impact of clean building standards? All venues improve, with planners positively disposed to boutiques, resorts

June 15 Responses

	MORE	FEWER
Downtown Hotel	9.22% 27	22.87% 67
Suburban Hotel	14.29% 35	24.49% 60
Boutique Hotel	20.64% 45	19.72% 43
Airport Hotel	13.17% 22	26.35% 44
Resort	18.80% 44	17.09% 40
Golf Resort	15.43% 27	22.29% 39
Conference Center	11.26% 26	25.97% 60
Convention Center	6.70% 13	34.54% 67
Sports Facility/Stadium/Arena	14.43% 14	42.27% 41
Gaming Facility	13.25% 11	43.37% 36
Cruise Ship	10.29% 7	66.18% 45
Other	23.08% 15	20.00% 13

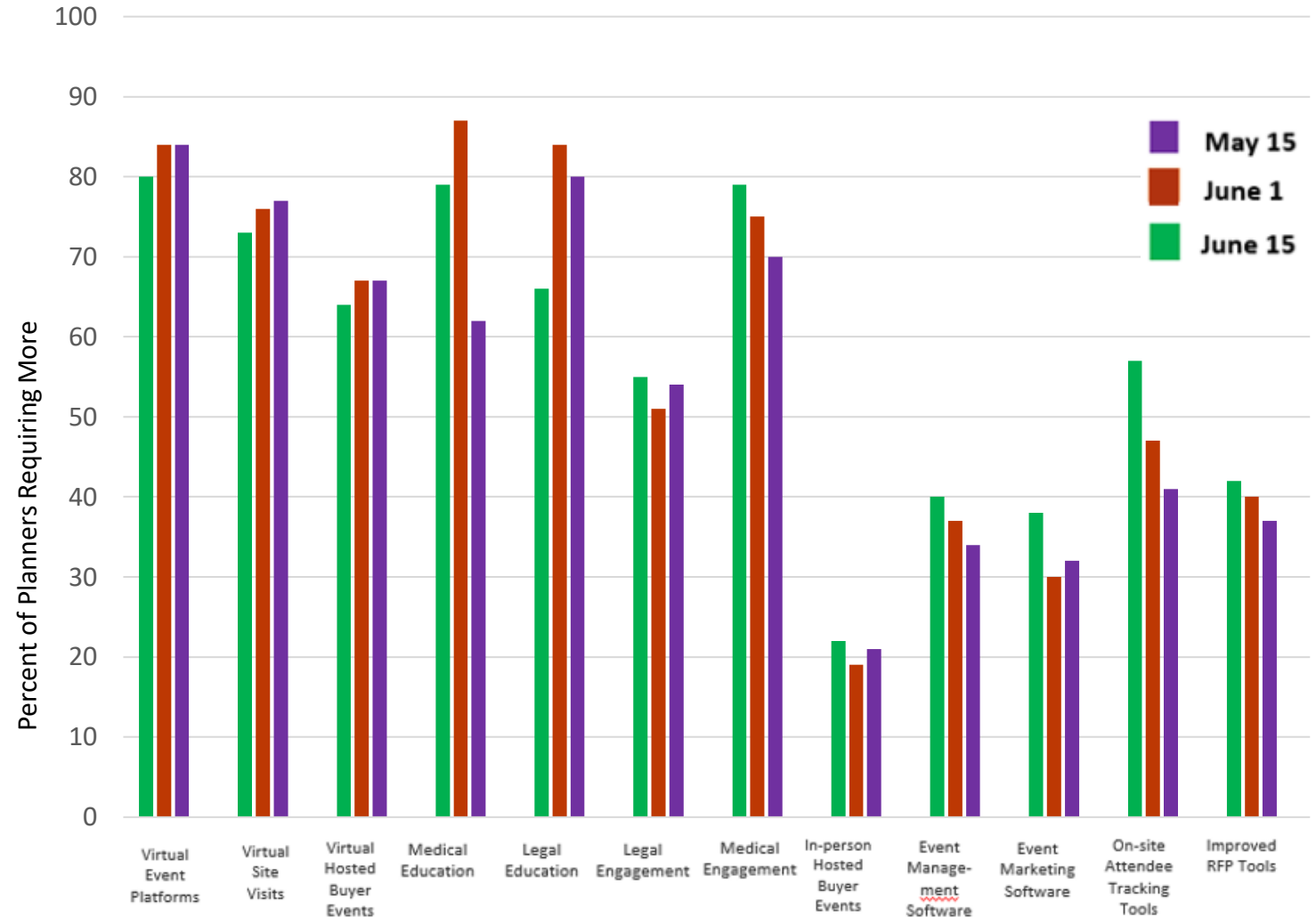


“Virtual” and “medical” top priorities, while attendee tracking gains favor

Do you expect you will require more or fewer of these products/services to plan your meetings and events?

June 15 Responses

	MORE		MORE
Virtual event platforms	80.39% 250	On-site registration tools to minimize crowding and touch points	78.00% 234
Virtual site visits	73.45% 213	Event management software	39.85% 108
Education specific to legal matters	65.57% 179	Event marketing software	38.30% 90
Education specific to health/medical safety matters	79.36% 223	On-site attendee-tracking tools	57.31% 145
Engagement of professional legal advisory services	54.72% 139	Improved RFP tools	41.80% 102
Engagement of health/medical safety advisory services	73.48% 194		
In-person, hosted-buyer events and fairs to support buying decisions	22.42% 50		
Virtual hosted-buyer events and fairs to support buying decisions	64.00% 128		

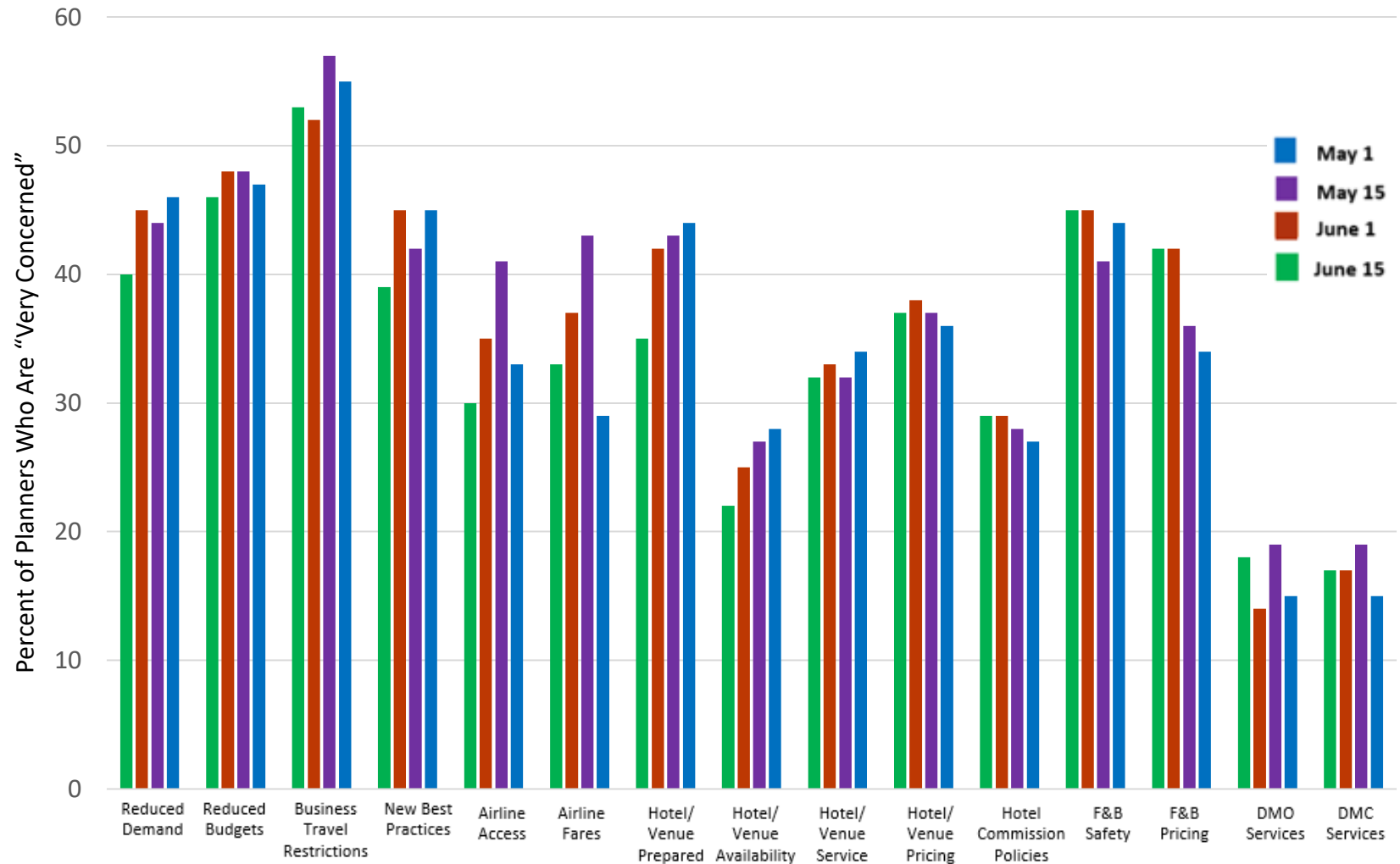


Business travel restrictions, F&B are planners top concerns

How concerned are you about the following?

June 15 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	39.64% 132	Hotel and venue service levels	31.91% 105
Reduced meeting and event budgets	46.08% 153	Hotel and venue pricing and rates	37.35% 124
Travel policy updates restricting business travel	52.73% 174	Hotel commission policies	28.67% 80
New best practices for gatherings	39.33% 129	Food-and-beverage safety	44.98% 148
Airline accessibility	30.10% 93	Food-and-beverage pricing	41.69% 138
Airline fares	32.91% 103	DMO availability and service levels	17.77% 43
Hotel and venue health and safety preparedness	35.24% 117	DMC availability and service levels	16.80% 43
Hotel and venue availability	22.36% 74		



Whatever it takes? Planners know these are the “new normal”

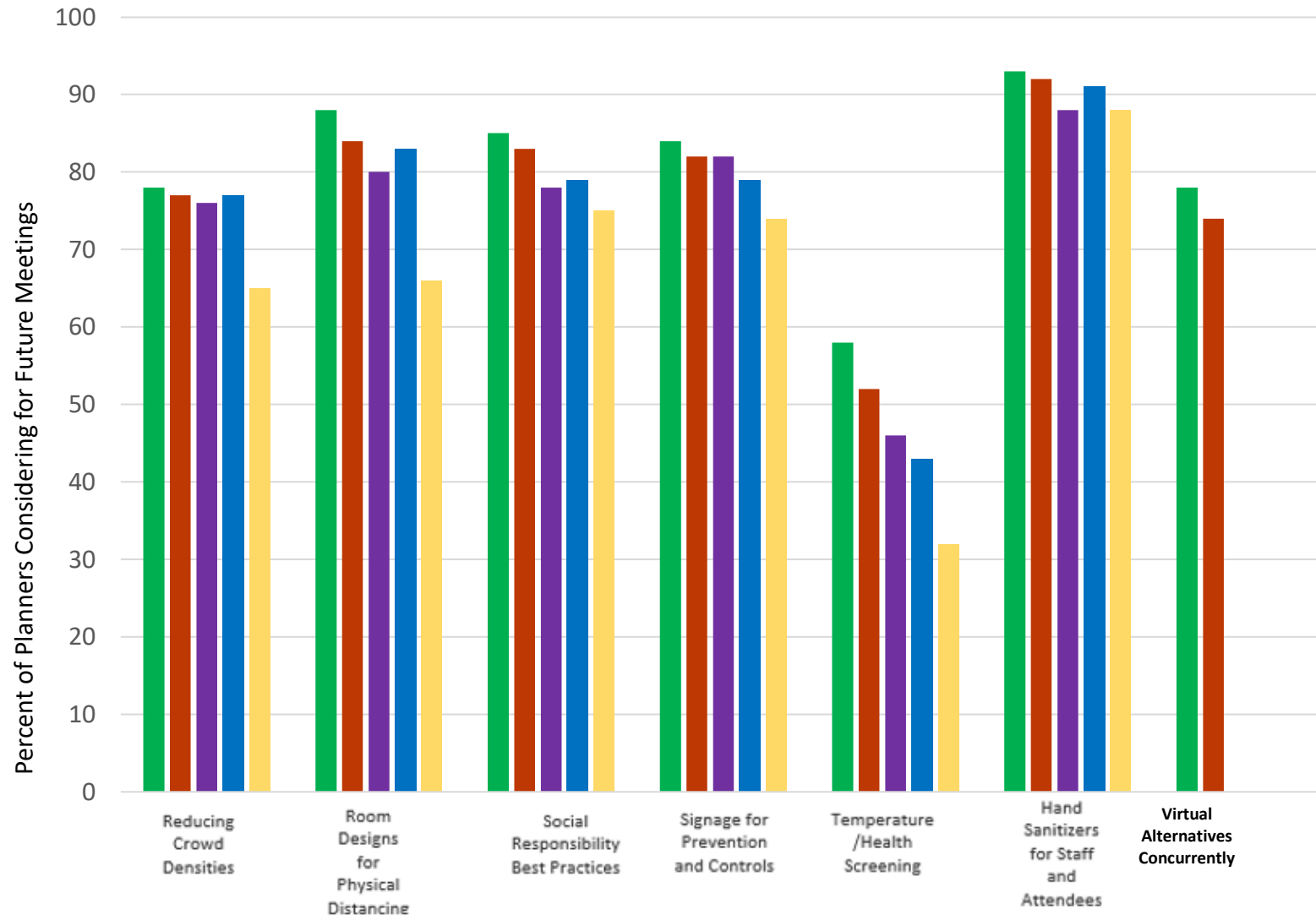
Are you considering any of the following in the planning of future events?

June 15 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	77.71%
Developing meeting room designs to encourage physical distancing	87.68%
Putting into place social responsibility best practices, including protocols for attendees who are ill	84.75%
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	84.46%
Providing temperature/health screening	58.36%
Providing hand sanitizer on-site for staff and attendees	92.67%
Providing virtual alternatives concurrently with physical events	77.71%
None of the above	1.17%
Other (please specify)	3.23%

Total Respondents: 575

■ April 15
■ May 1
■ May 15
■ June 1
■ June 15

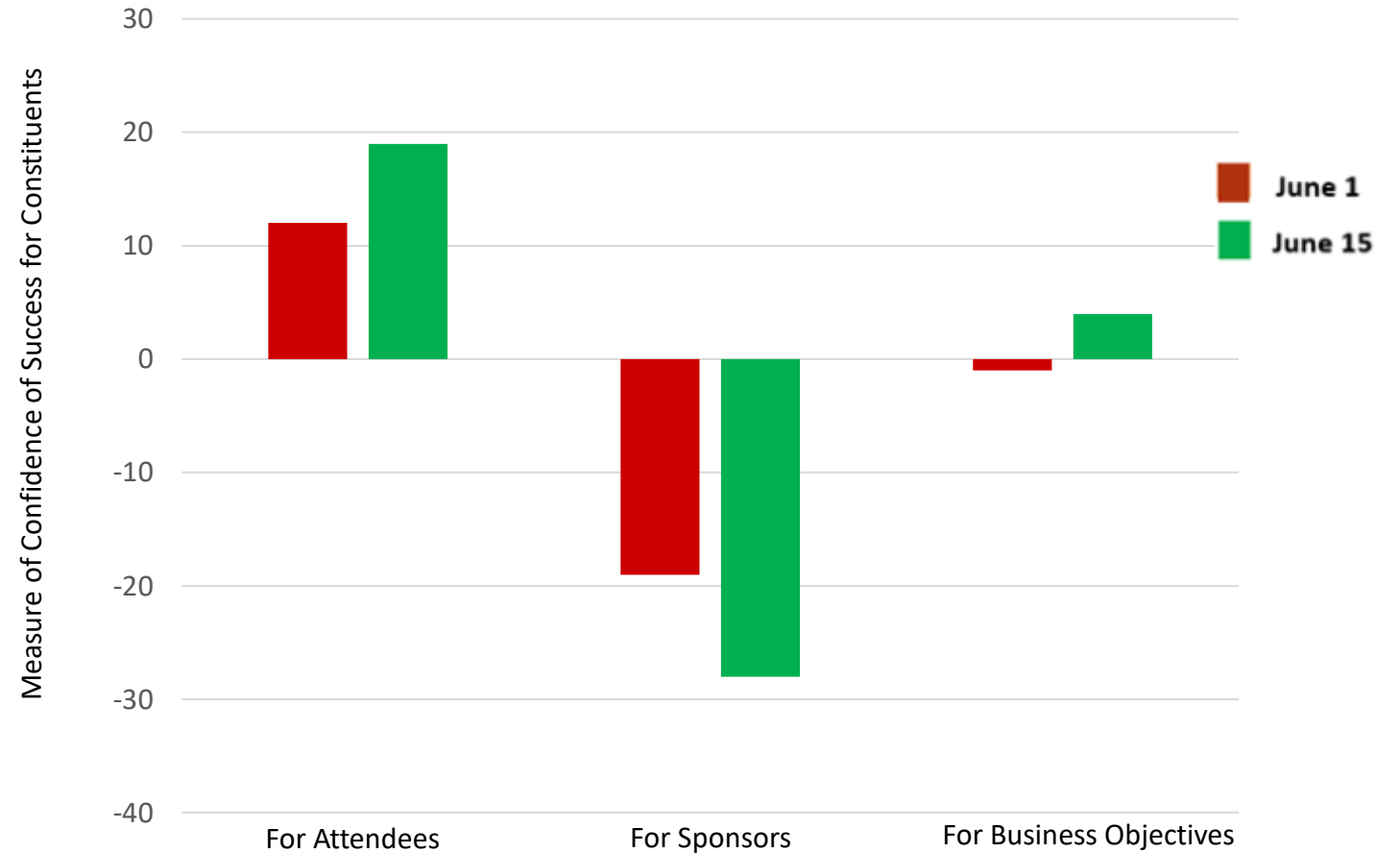


Application of virtual to attendees is more readily understood, though a sponsor model is elusive

How successful will virtual events be for your constituents? Please rate your confidence, 5 being highly confident, one being not at all confident

June 1 Responses

	1-2	3	4-5
For attendees	22.02% 74	37.20% 125	40.77% 137
For sponsors	47.24% 154	33.13% 108	19.63% 64
For business objectives	31.53% 105	33.33% 111	35.14% 117
Not applicable	54.69% 35	26.56% 17	18.75% 12



In Summary:

- ✓ Back to work: 1 in 5 planners are back in their offices
 - ✓ Hesitancy to book meetings/events is exacerbated by difficulty reaching suppliers
 - ✓ 4 in 10 planners expect to actualize events before year-end 2020
 - ✓ Local meetings of 100 attendees or less are the post-COVID-19 industry standard, for now
 - ✓ Planners anticipate continued contract resiliency, flexibility
 - ✓ Boutiques and resorts are the preferred venues for post COVID-19 meetings
 - ✓ How do you achieve your business objectives through virtual meetings?
Planners are not sure
- “I’m concerned about the domestic regional differences of restrictions in opening and conducting events. I will consider looking at more secondary and other markets instead of big cities, as long as transportation to/from is adequate.”
 - “With large meetings industry conferences like IMEX and CONNECT canceling, it's hard to convince clients that meetings will be safe, and that they should move forward on their face-to-face events.”
 - “Concerns revolve around the behavioral mind shift of the planner and attendee as it relates to the mitigation of risks for in-person events and the ROI on virtual events. The uncertainty is unsettling. It will take several years to build the level of trust in having safe and effective in-person events.”
 - “My concern is that my clients and prospective clients are afraid to move forward with in-person meetings due to the fear of liability.”
 - “In truth, between budget cuts and Covid-19 fears, most of our delegates will not travel until there is a vaccine .”