PULSE SURVEY

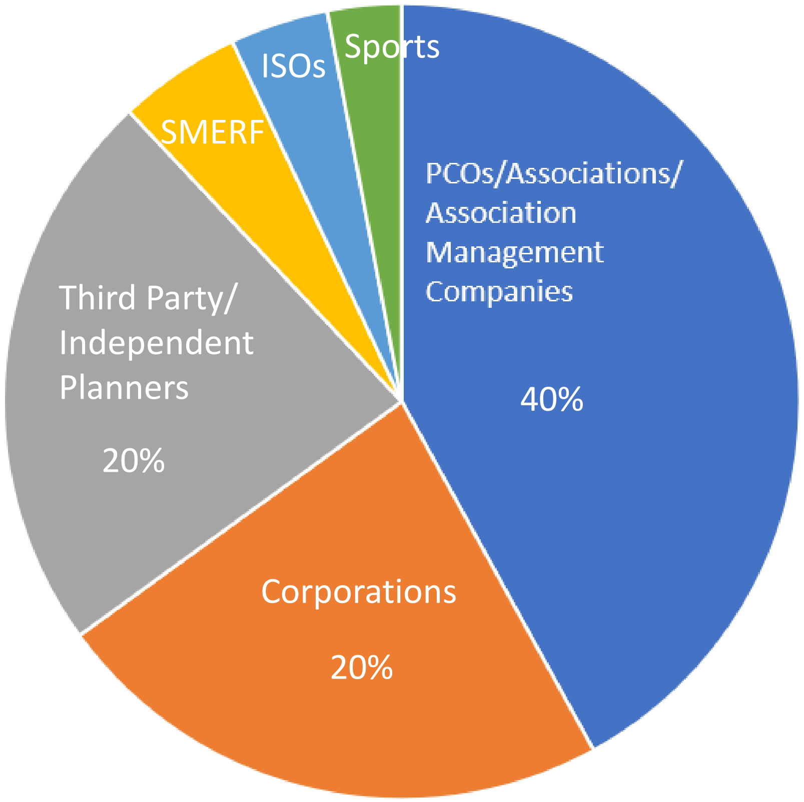
THE FUTURE OF MEETINGS AND EVENTS IN THE ERA OF COVID-19

WEDNESDAY, AUGUST 26, 2020

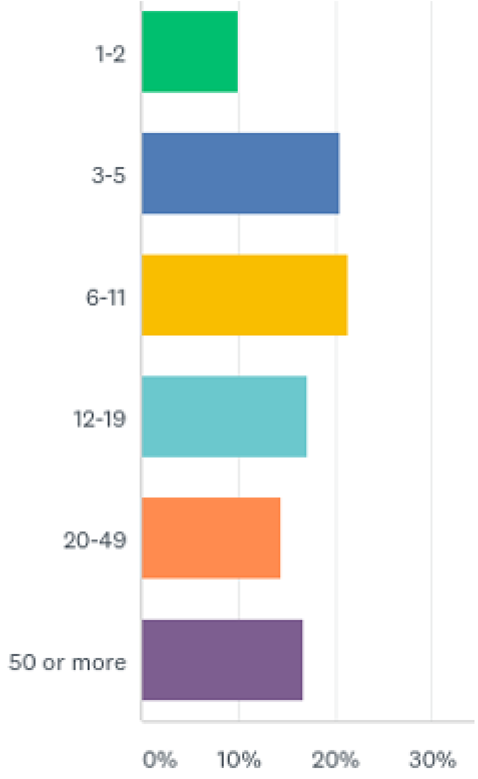
NORTHSTAR MEETINGS GROUP

Respondents By Type, Volume and Size

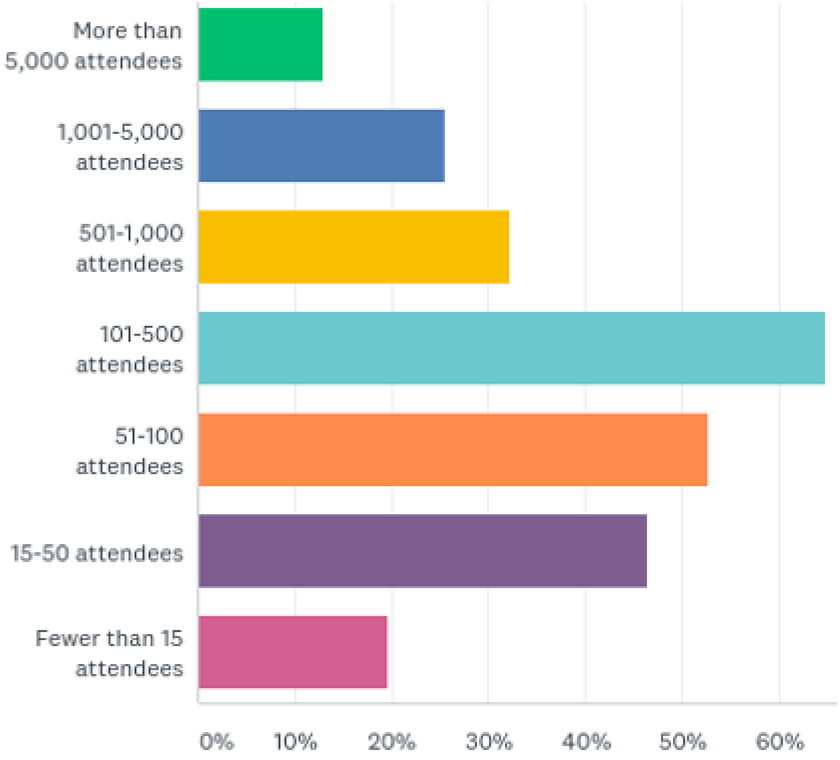
819 Valid Planner Responses



Type



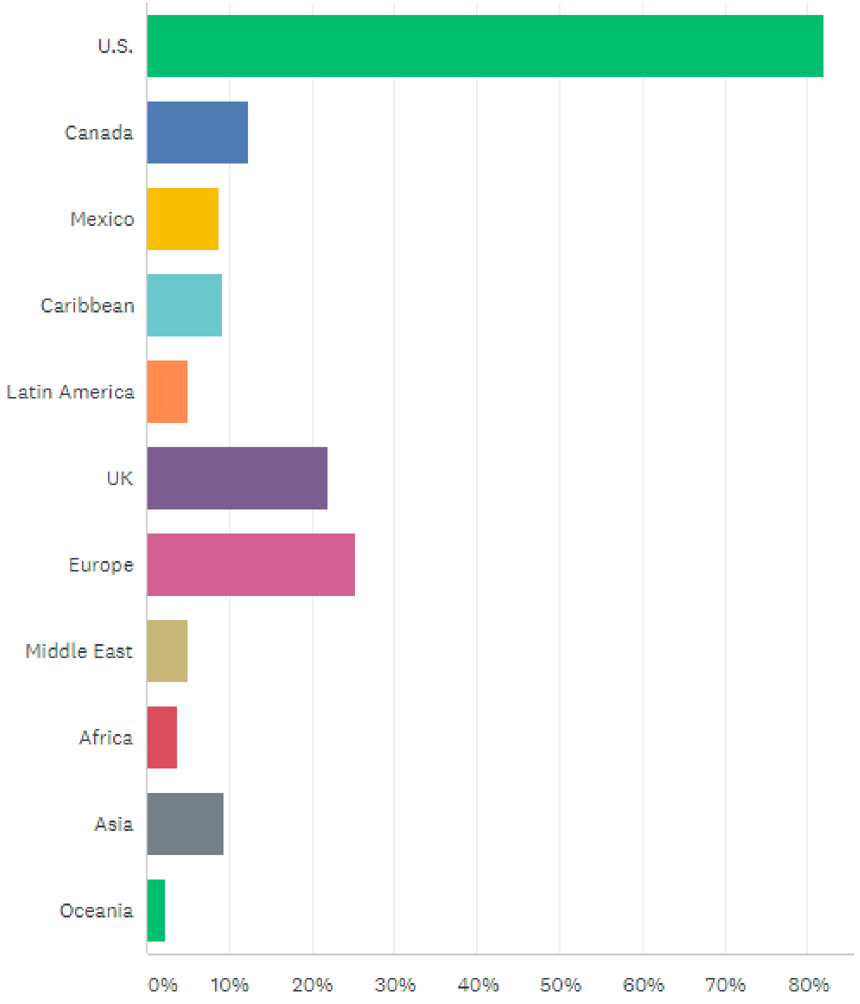
# of Meetings

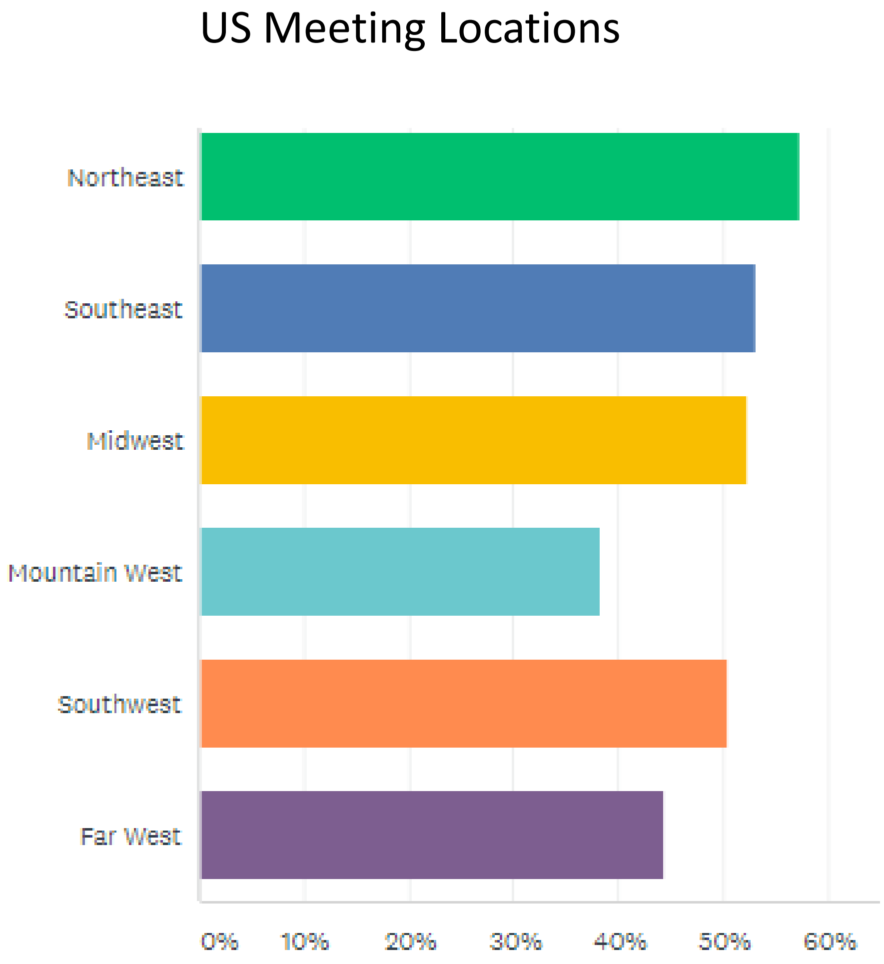


Size of Meeting

August 25, 2020

Respondents by Meeting Location

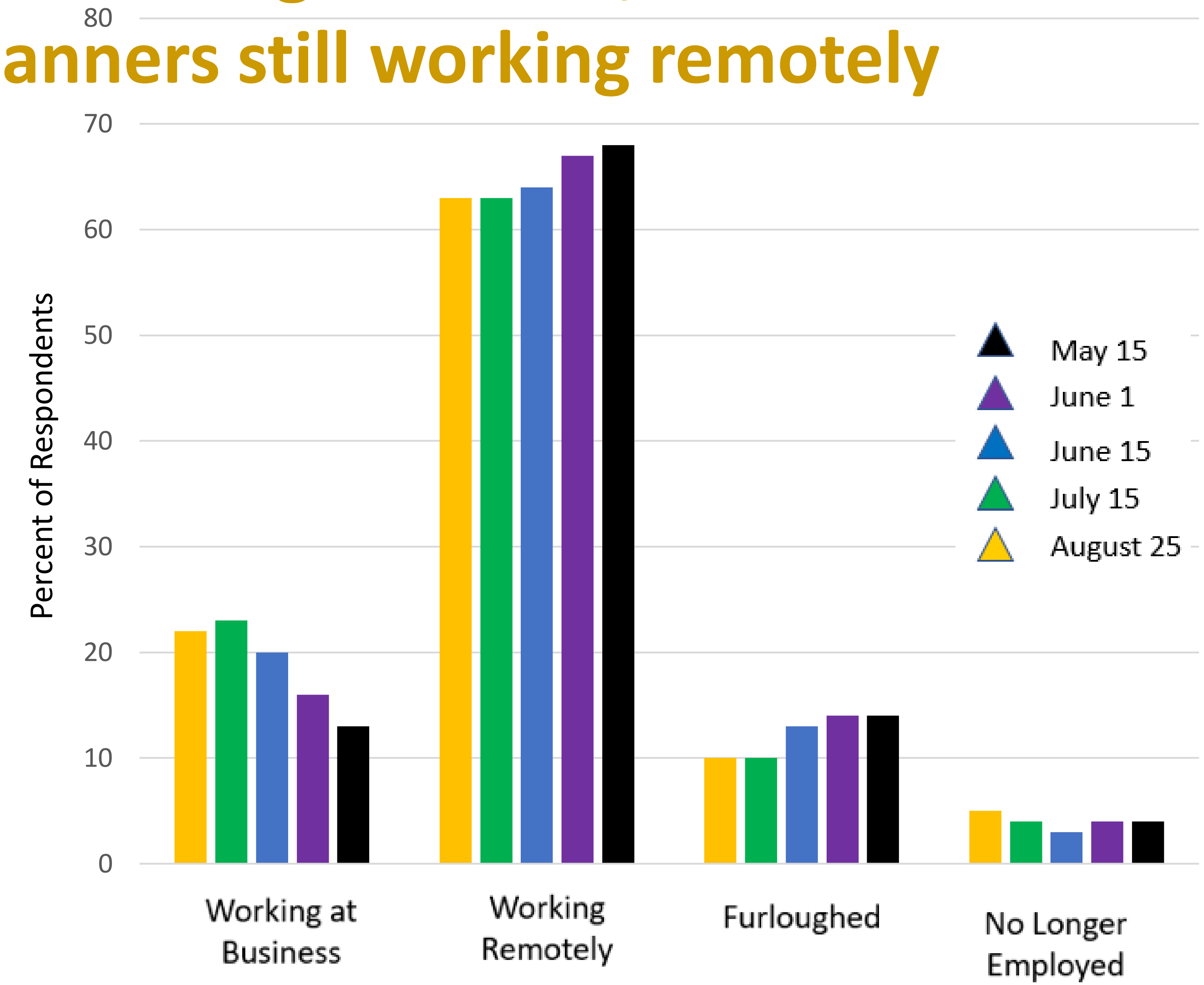




No changes to working locations, with the majority of planners still working remotely

August 25 Responses

Working full time at a business location	21.52%
Working full time remotely	62.60%
Furloughed, I remain employed but I am now working part-time.	6.30%
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	1.84%
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	3.02%
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	3.67%
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.	1.05%

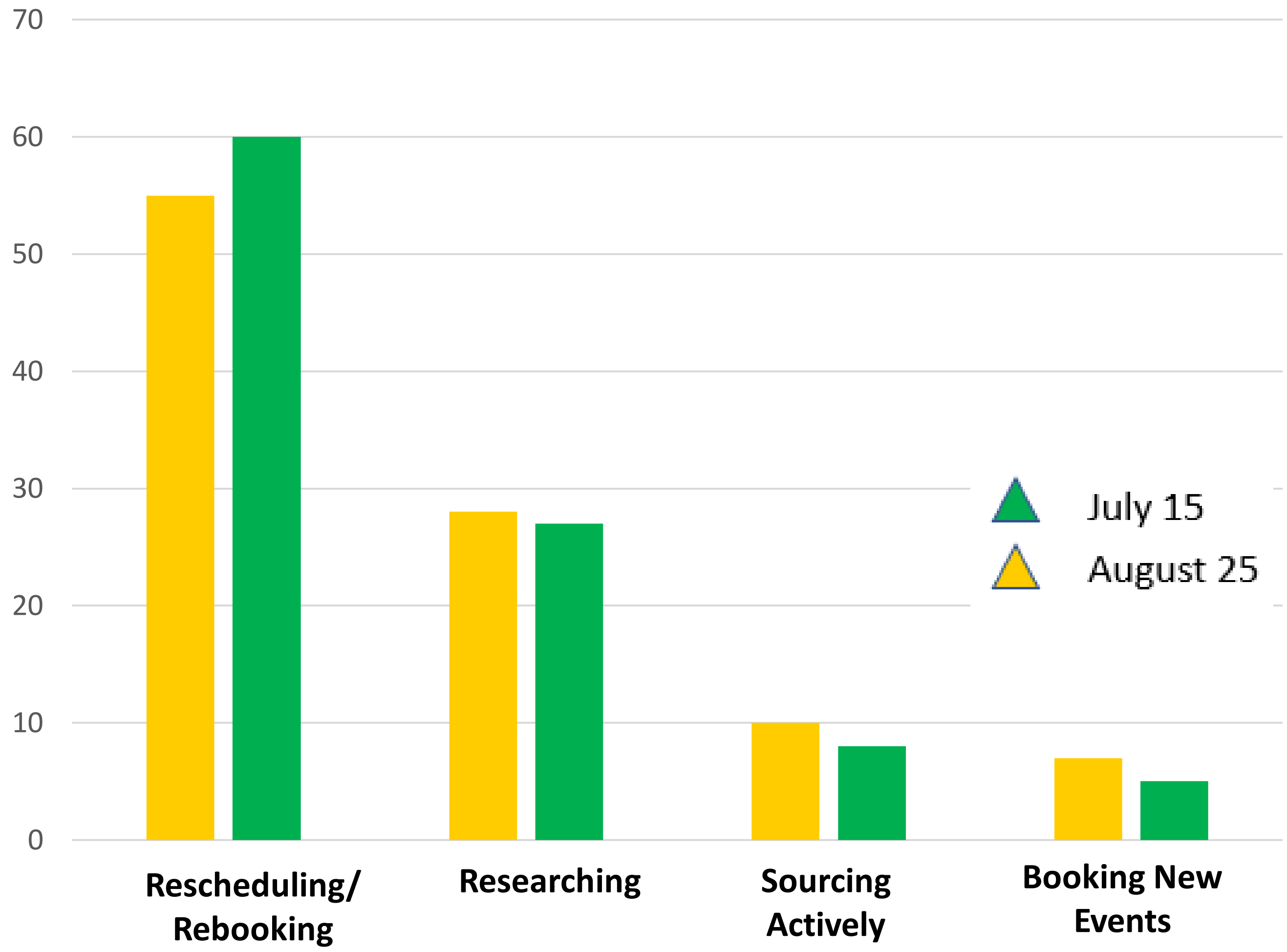


Rebooking Continues to Be the Primary Focus

Though New Booking and Sourcing Activity Rises from July's Low

August 25 Responses

I am rescheduling or rebooking events.	54.96%
I am researching potential new events, but not ready to issue an RFP or lead.	27.84%
I am actively sourcing (issuing RFPs or leads) for new events.	9.93%
I am booking new events.	7.27%



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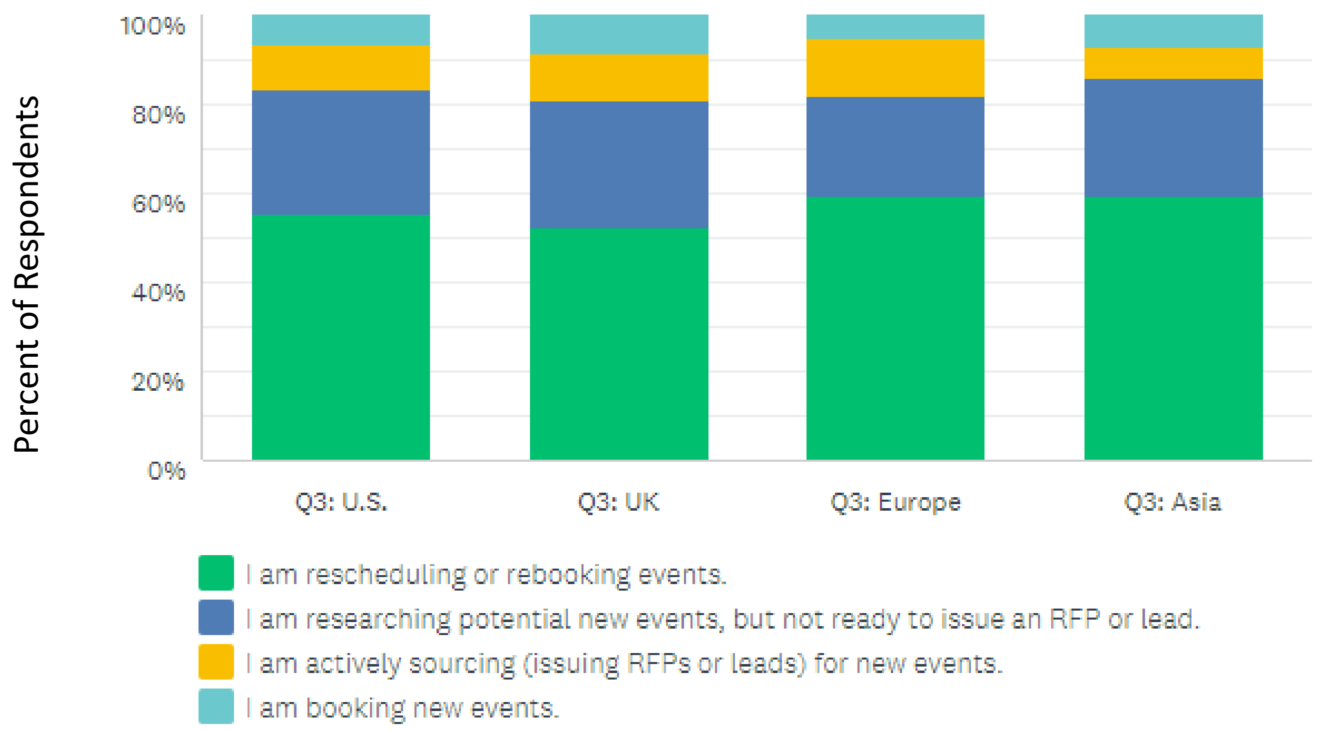
Regardless of Event Location, Planners' Primary Focus Continues to Be Rescheduling

What is your current primary focus?

Are you rescheduling, booking, or researching?

August 25 Responses

	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.
Q3: U.S.	55.32% 265	28.39% 136	9.60% 46	6.68% 32
Q3: UK	52.38% 66	28.57% 36	10.32% 13	8.73% 11
Q3: Europe	59.59% 87	22.60% 33	13.01% 19	4.79% 7
Q3: Asia	59.65% 34	26.32% 15	7.02% 4	7.02% 4

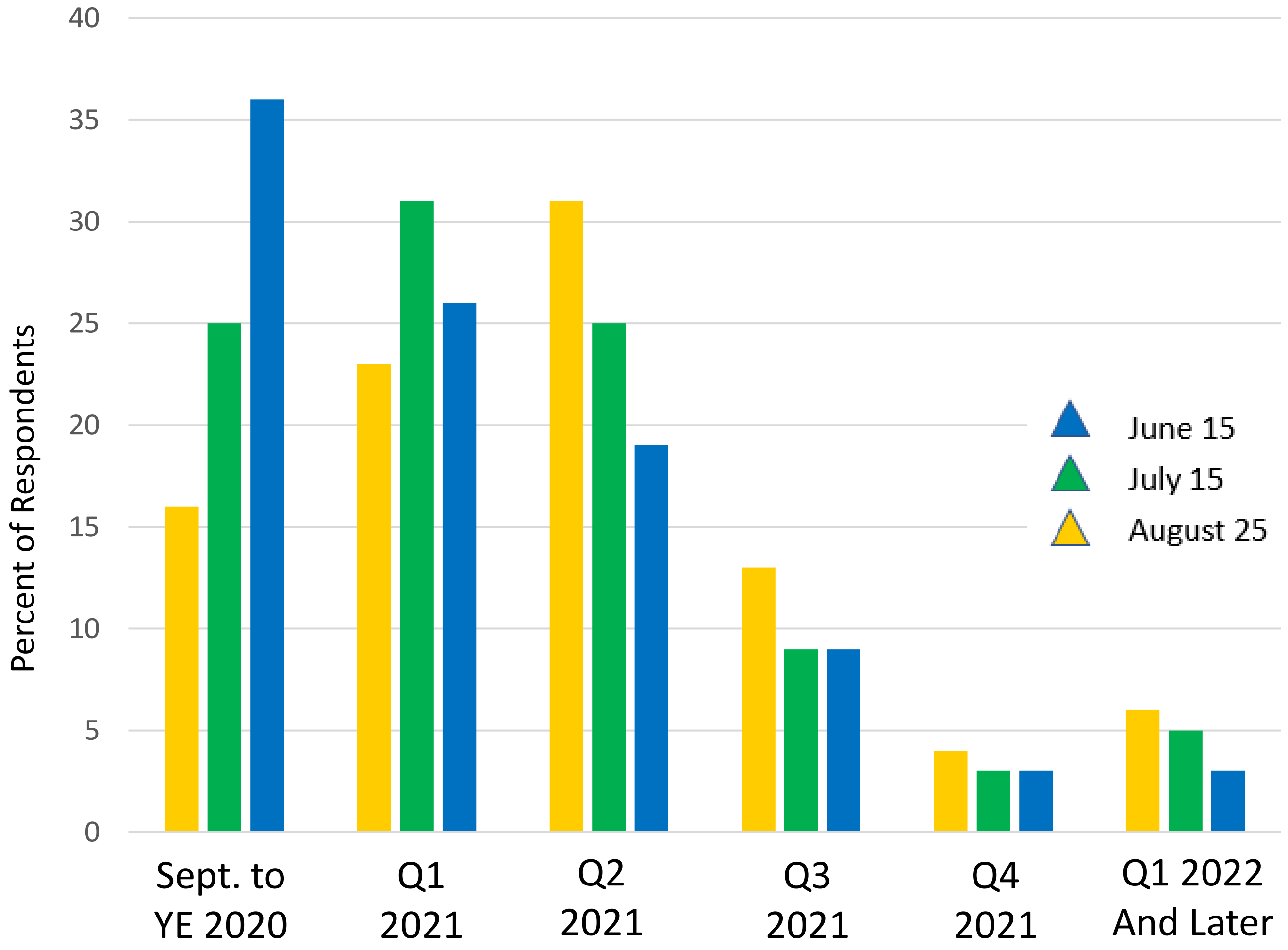


Majority of Planners Rescheduling for Q2 ’21

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

August 25 Responses

September to Year-End 2020	16.23%
Q1 2021	23.28%
Q2 2021	31.39%
Q3 2021	12.70%
Q4 2021	3.70%
Q1 2022 and later	6.00%



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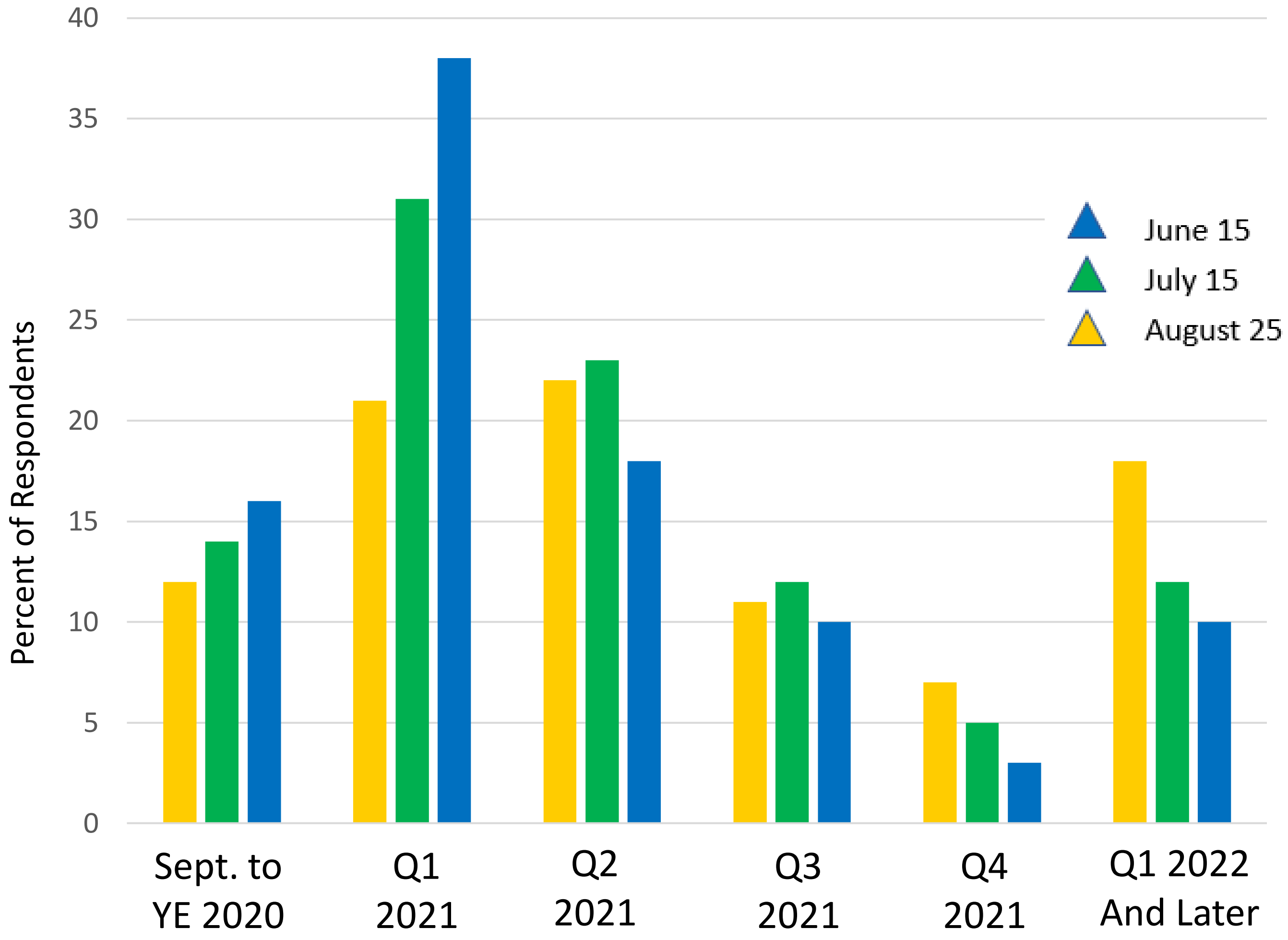
Big Shift Seen for New Meetings to 2022

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

August 25 Responses

September to Year-End 2020	11.99%
Q1 2021	20.99%
Q2 2021	22.22%
Q3 2021	10.93%
Q4 2021	6.70%
Q1 2022 and later	17.81%



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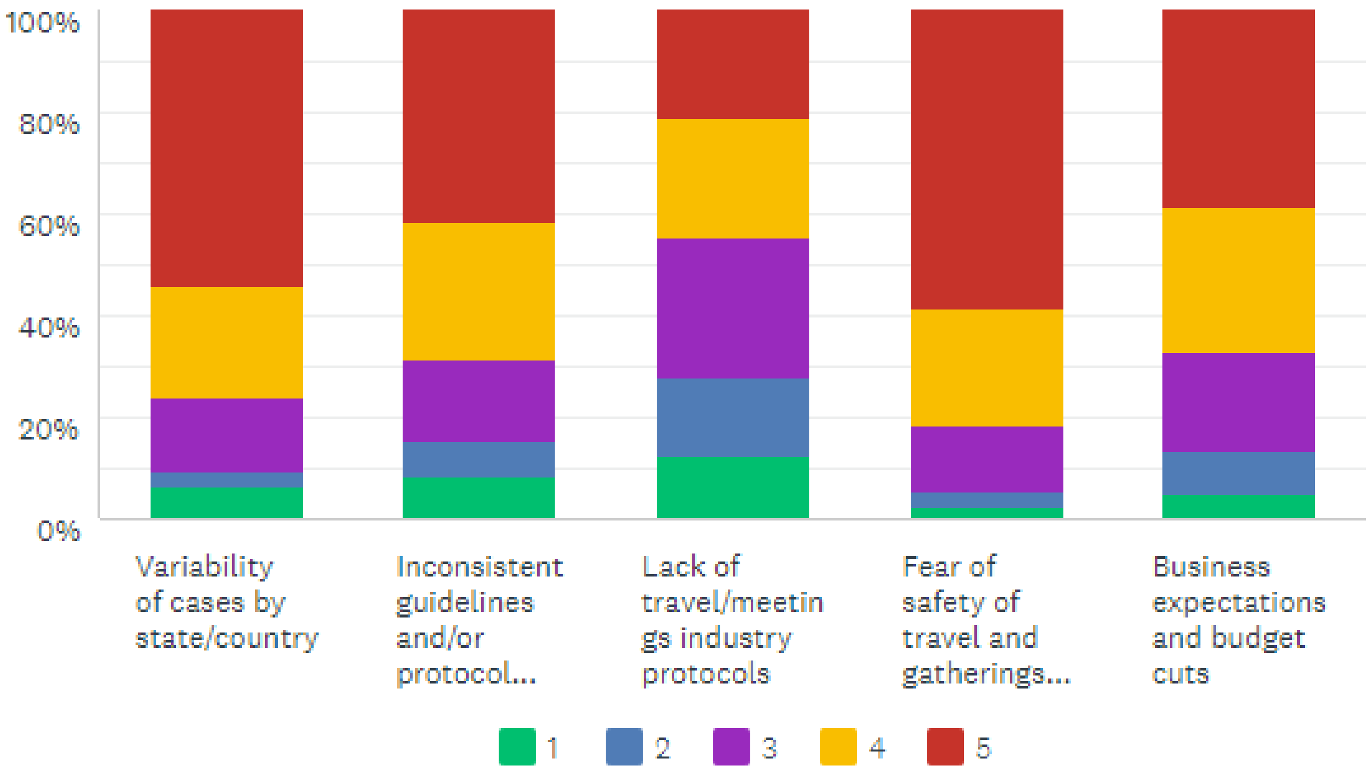
Fear is the Biggest Obstacle

87% report it significantly affects their ability to plan live events in the near-term

Factors that are affecting planners' ability to plan live events in the near-term (1 = not at all; 5 = very significantly)

	1	2	3	4	5
Variability of cases by state/country	6.51% 37	2.99% 17	14.44% 82	22.18% 126	53.87% 306
Inconsistent guidelines and/or protocol enforcements by state/country	8.55% 49	6.81% 39	16.23% 93	27.05% 155	41.36% 237
Lack of travel/meetings industry protocols	12.39% 71	15.71% 90	27.40% 157	23.56% 135	20.94% 120
Fear of safety of travel and gatherings, regardless of protocols	2.43% 14	3.30% 19	12.70% 73	23.30% 134	58.26% 335
Business expectations and budget cuts	5.04% 29	8.35% 48	19.48% 112	28.87% 166	38.26% 220



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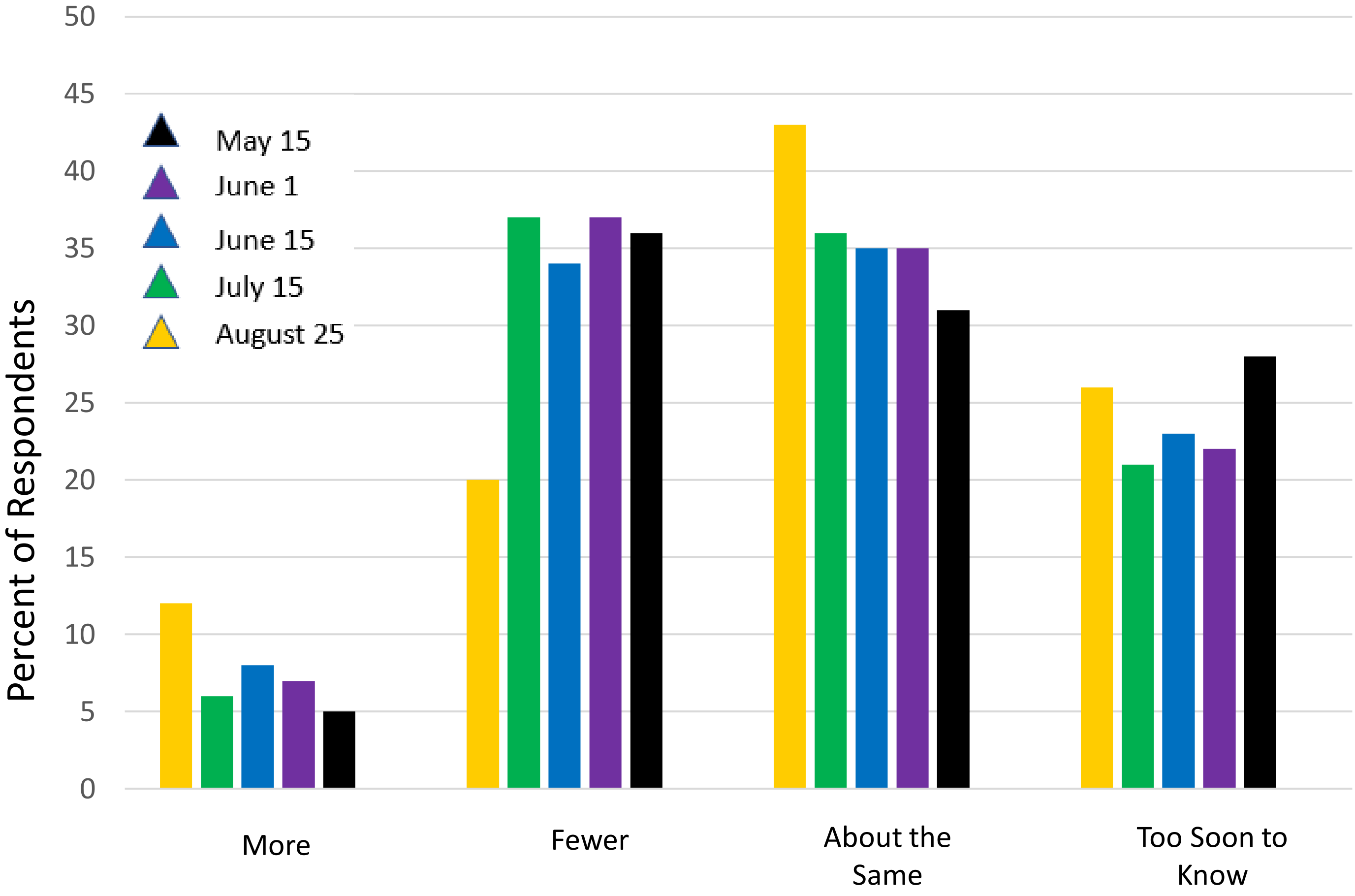
Light at the End of the Tunnel: Is the Expectation for ’21 and ‘22 Boosting Planner Confidence?

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

August 25 Responses

More	11.81%
Fewer	19.97%
About the same	42.53%
It's too soon to know.	25.69%



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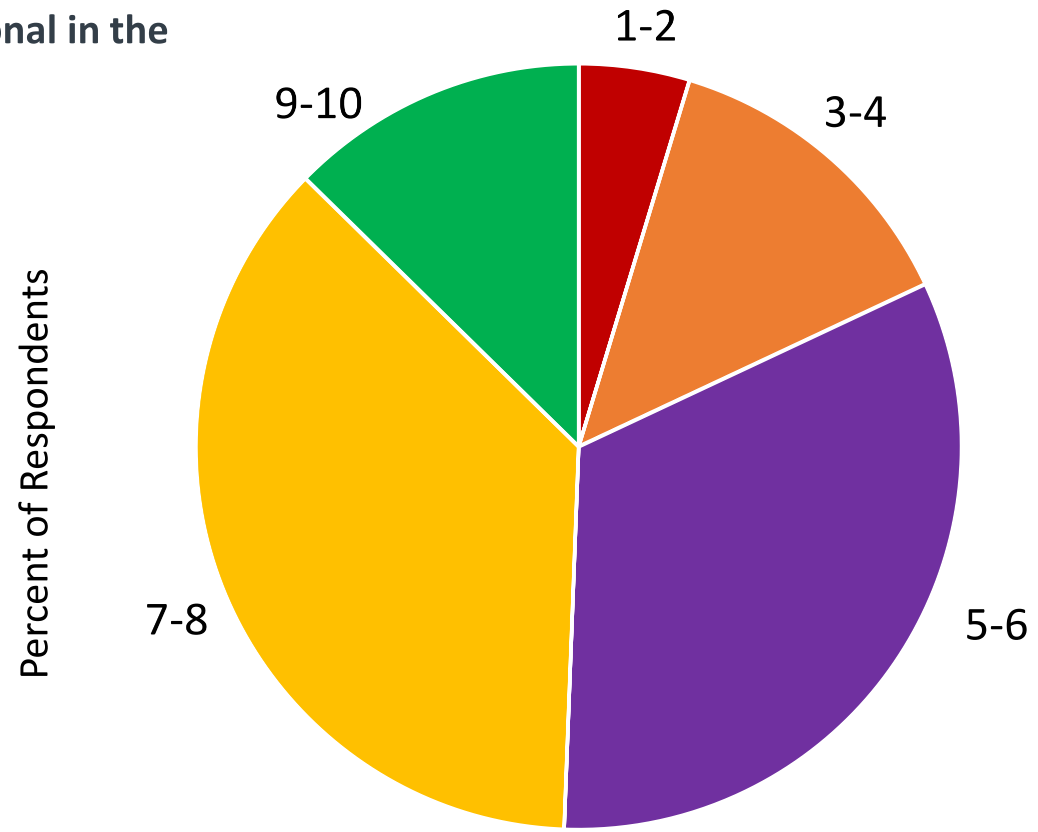
Light at the End of the Tunnel: Is the Expectation for ’21 and ‘22 Boosting Planner Confidence?

On a scale of 1 to 10, how confident are you about the near-term future (over the next five years) for the meetings and events industry, and your role as a professional in the industry. (1 being not at all confident, 10 being highly confident.)

On a Scale of 1-10:

6.25

As of August 25, 2020



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Planners are Generally Satisfied with Industry Leadership in this Time of Crisis

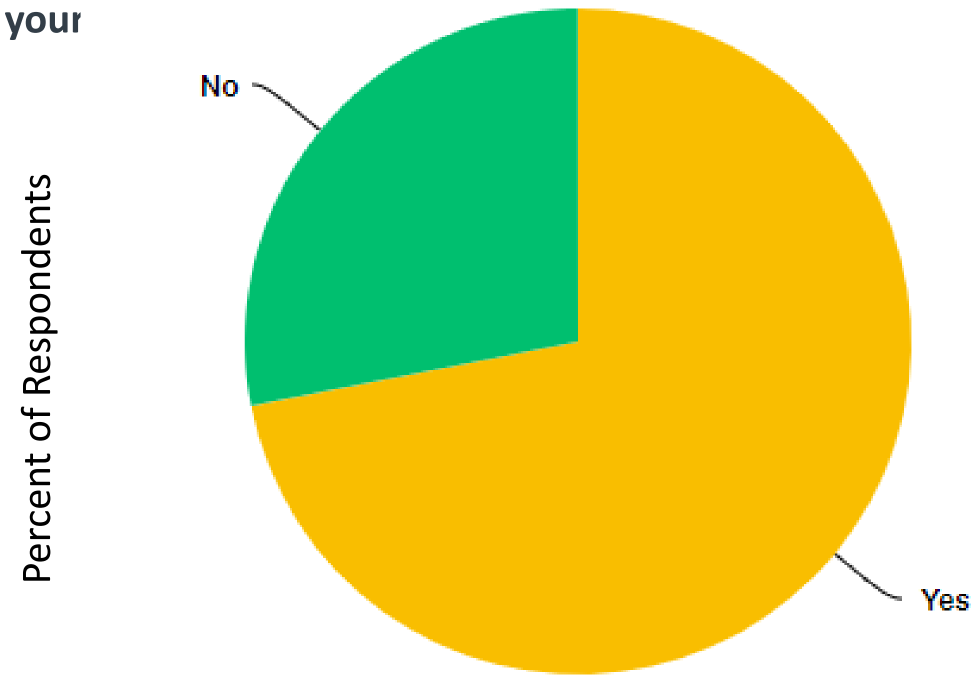
As of August 25, 2020

Do you believe industry leadership (associations, organizations, hospitality industry executive leadership, etc.) has responded adequately to address your needs during the crisis?

72% Say “Yes”

”I feel like the major hotels and airlines and associations/councils are working around the clock to get meetings and events back in business. They have done everything they can to help planners navigate what's next.”

“The need for a coordinated industry response is greater than ever.”



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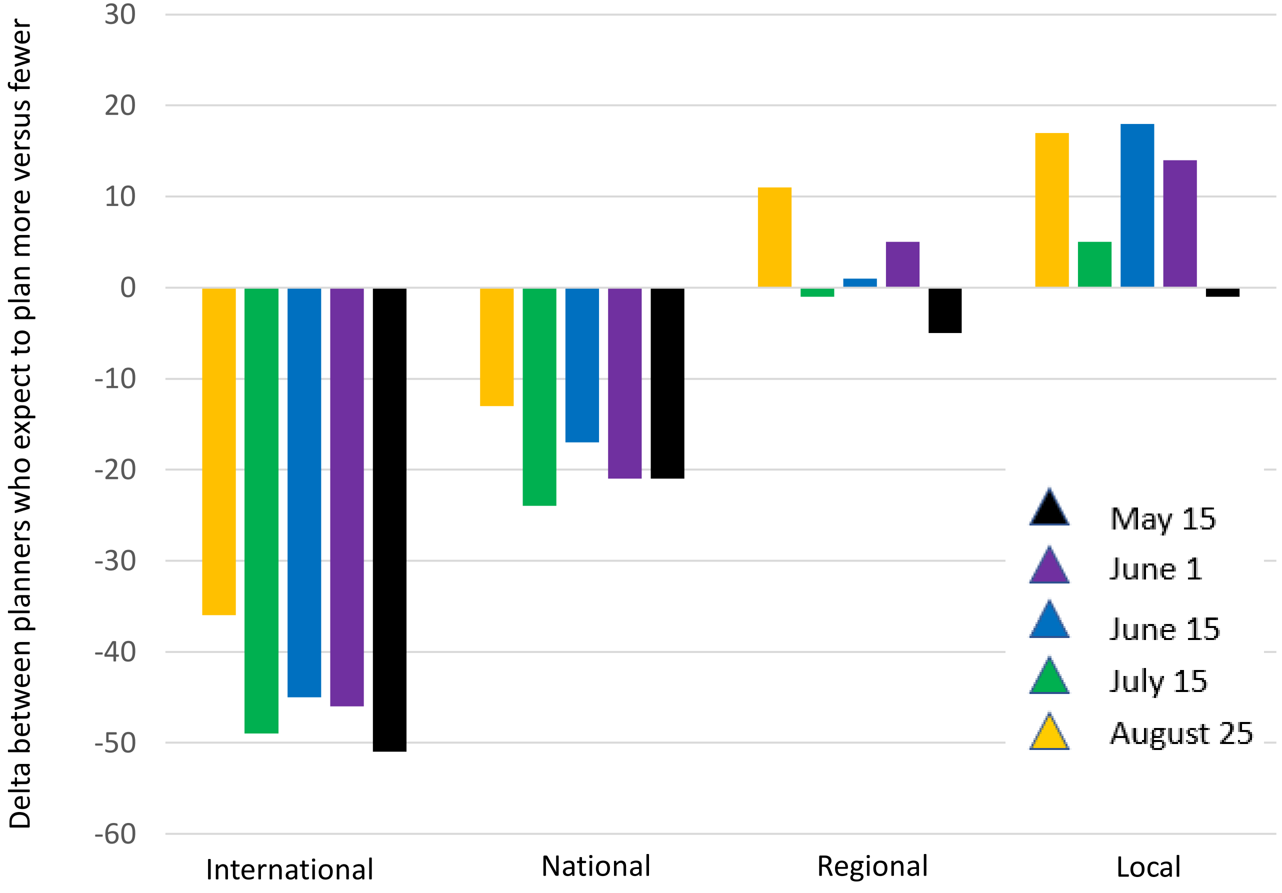
More or Fewer?

Planners anticipate more local and regional events (again), and gain confidence in national and international events

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

August 25 Responses

	MORE	FEWER
International	9.45% 31	45.43% 149
National	12.63% 59	25.48% 119
Regional	28.22% 127	17.56% 79
Local	31.22% 128	13.90% 57



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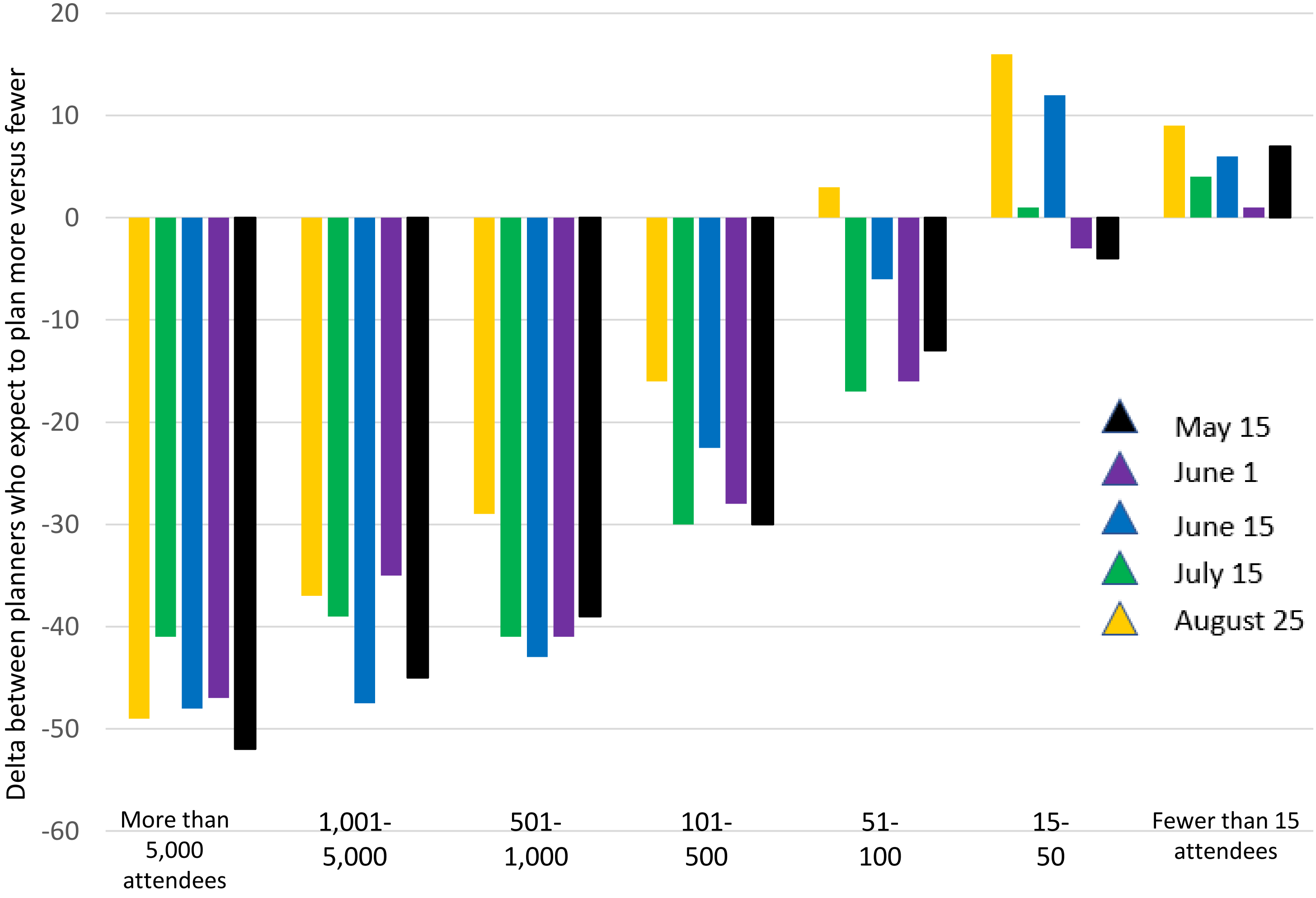
More or Fewer?

Meetings < 100 attendees expected to grow in number, while large events remain less likely

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

August 25 responses

	MORE	FEWER
More than 5,000 attendees	5.46% 10	54.10% 99
1,001-5,000 attendees	4.81% 13	42.22% 114
501-1,000 attendees	8.88% 31	38.11% 133
101-500 attendees	11.40% 57	27.60% 138
51-100 attendees	21.67% 101	18.67% 87
15-50 attendees	30.51% 144	14.83% 70
Fewer than 15 attendees	26.58% 97	18.08% 66



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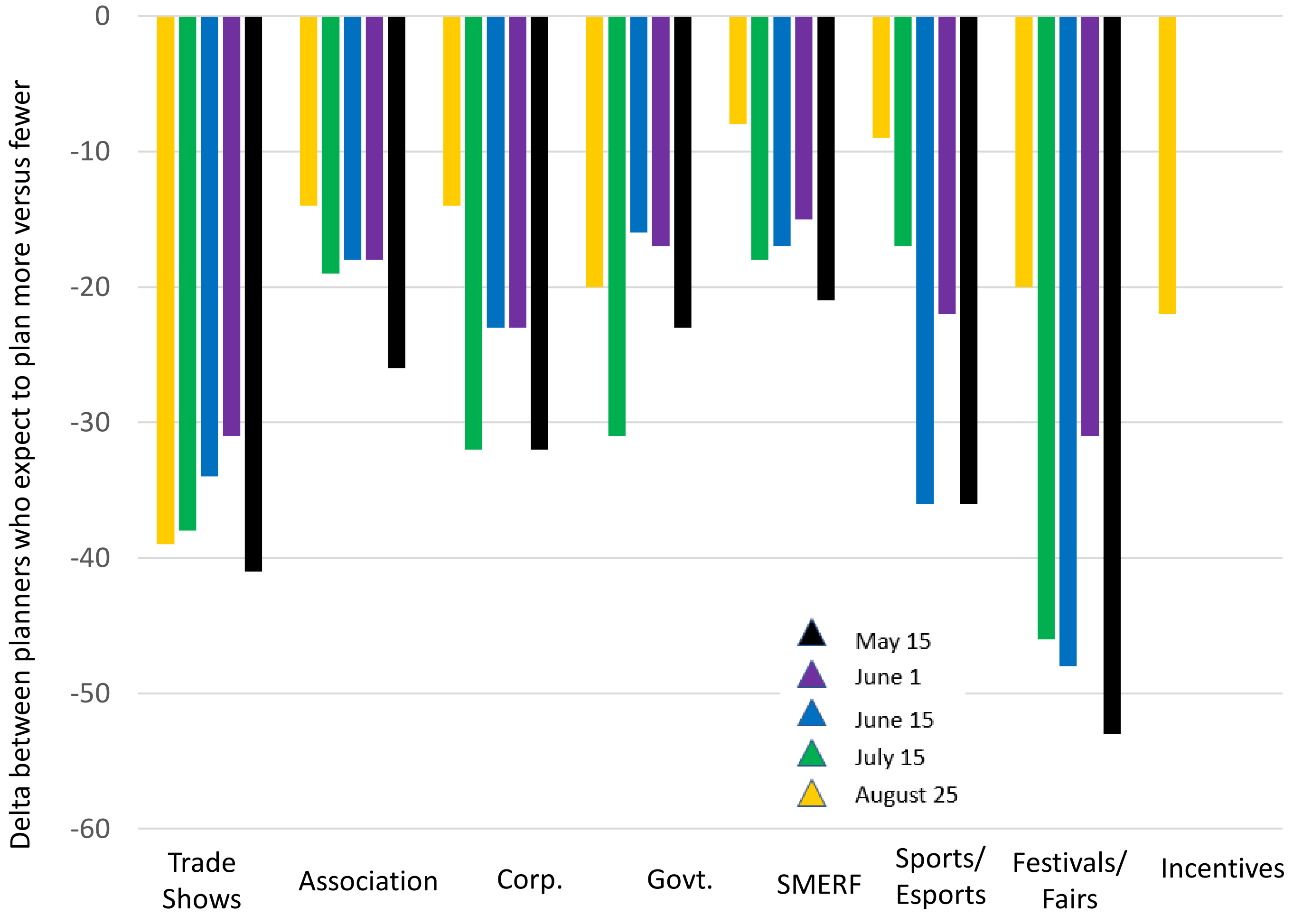
Prospects for Trade Shows Approach Lowest Levels

Though Expectations Remain , All Other Event Categories Show Gains

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

July 15 Responses

	MORE	FEWER
Trade Shows/Exhibitions/Congresses	2.68% 11	40.98% 168
Association	7.51% 29	26.42% 102
Corporate	8.94% 38	40.94% 174
Government	10.71% 15	41.43% 58
Social, Military, Education, Religion, Fraternal	13.53% 28	31.40% 65
Sports/Esports	19.57% 27	36.96% 51
Festivals/Fairs	9.02% 12	54.89% 73



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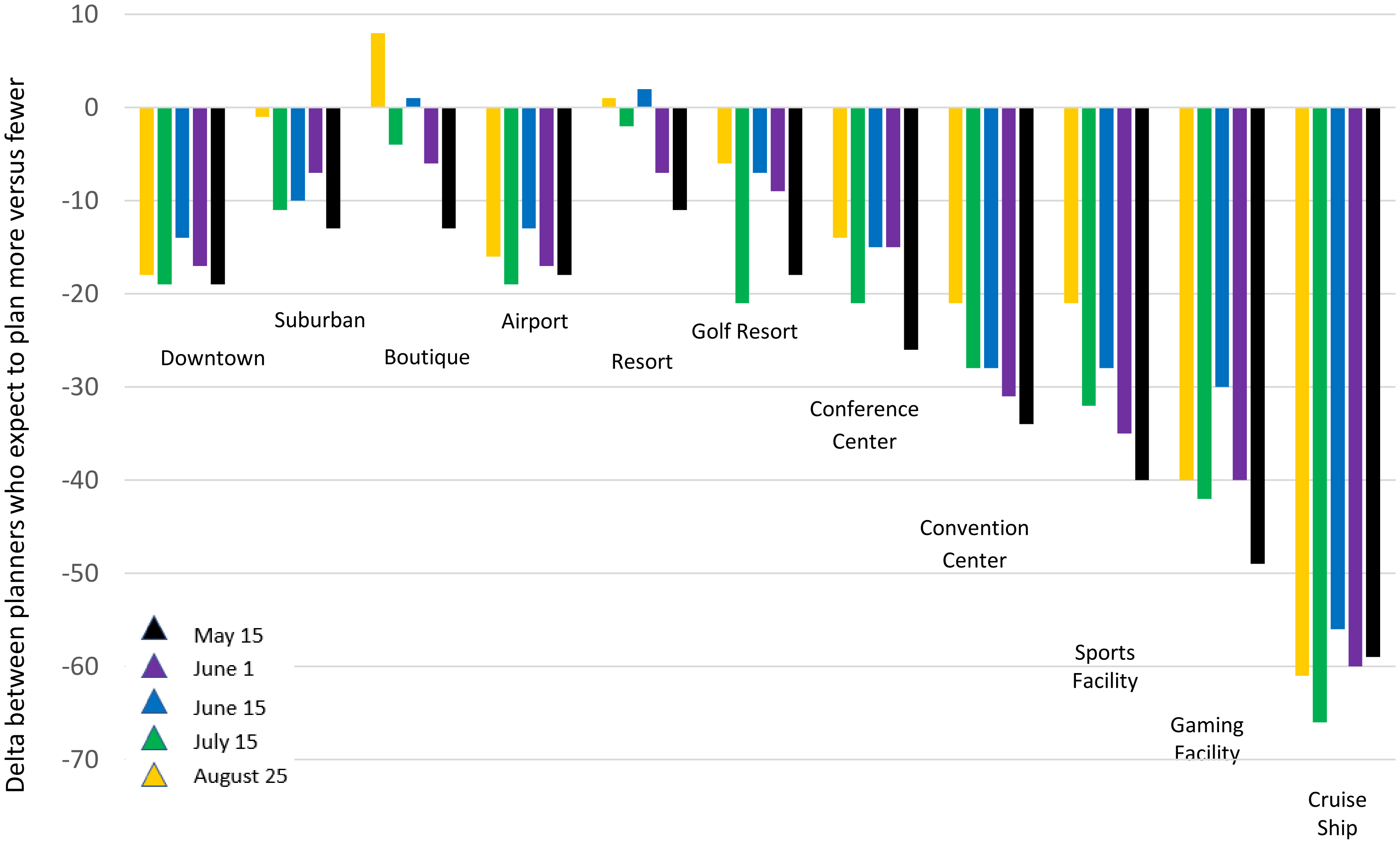
Among Venue Types, Boutique Hotels, Resorts Increase in Favor

While large, complex facilities are less likely to attract meetings

August 25 Responses

	MORE	FEWER
Downtown Hotel	6.32% 32	23.91% 121
Suburban Hotel	16.43% 68	17.87% 74
Boutique Hotel	21.82% 84	14.29% 55
Airport Hotel	11.36% 35	26.62% 82
Resort	18.54% 79	17.84% 76
Golf Resort	13.95% 42	20.27% 61
Conference Center	11.03% 43	25.38% 99
Convention Center	9.97% 35	30.77% 108
Sports Facility/Stadium/Arena	13.69% 23	35.12% 59
Gaming Facility	5.80% 8	45.65% 63
Cruise Ship	6.96% 8	67.83% 78



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Onsite Technology Tools Rise Relative to Interest in Virtual

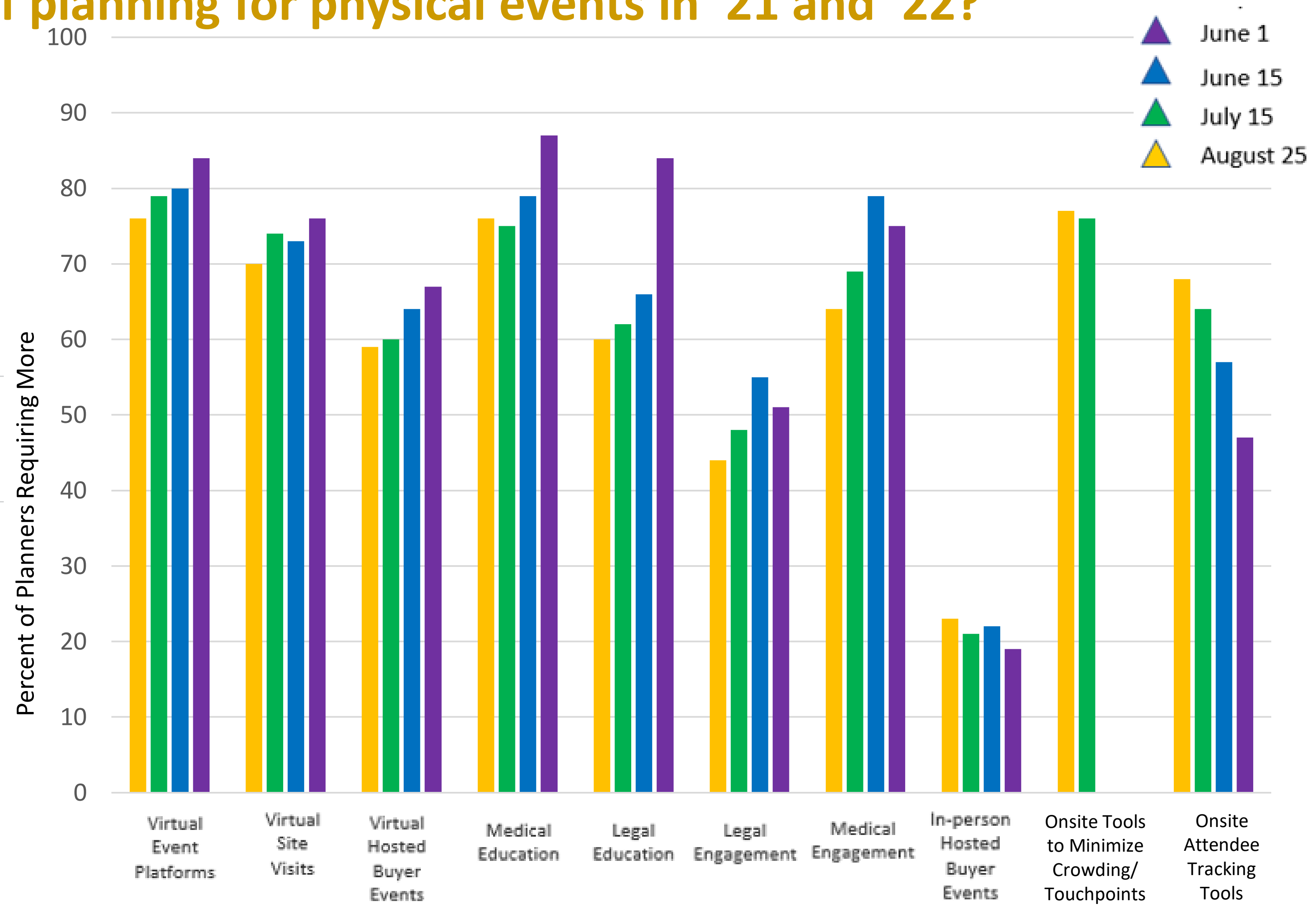
An indicator of planning for physical events in ‘21 and ‘22?

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

August 25 Responses

	MORE	FEWER
Virtual event platforms	75.80% 404	12.01% 64
Virtual site visits	69.66% 349	13.77% 69
Education specific to legal matters	60.29% 290	3.95% 19
Education specific to health/medical safety matters	76.48% 387	3.75% 19
Engagement of professional legal advisory services	44.42% 199	3.57% 16
Engagement of health/medical safety advisory services	64.47% 294	5.26% 24
In-person, hosted-buyer events and fams to support buying decisions	23.31% 93	35.59% 142

	MORE	FEWER
Virtual hosted-buyer events and fams to support buying decisions	58.53% 223	18.90% 72
On-site registration tools to minimize crowding and touch points	76.85% 405	5.69% 30
On-site attendee-tracking tools	68.22% 307	6.67% 30



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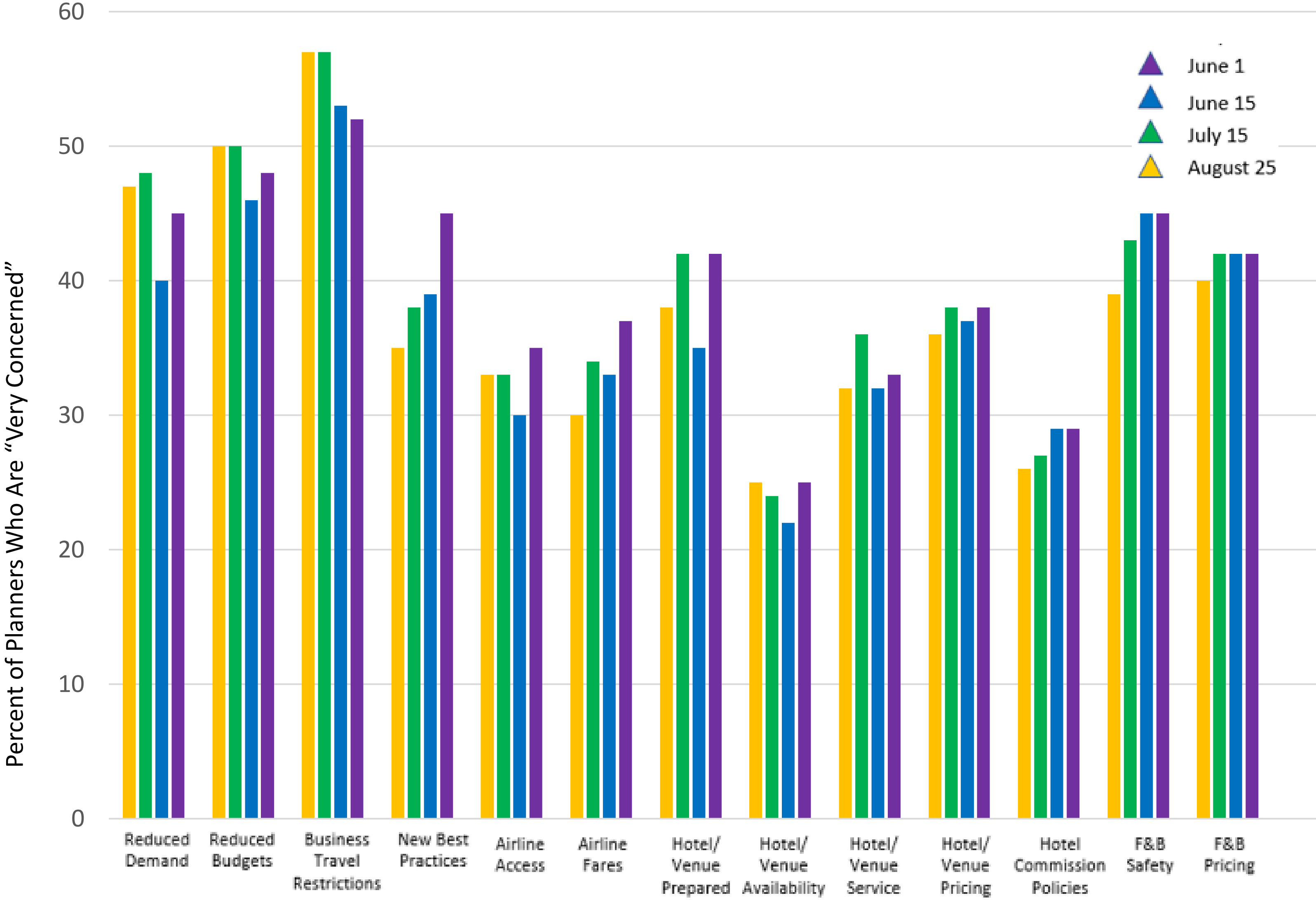
“If You Build It, They May Not Come”: Travel Restrictions the Top Concern

How concerned are you about the following?

August 25 Responses

	VERY CONCERNED
Reduced demand for in-person meetings and events	47.36% 269
Reduced meeting and event budgets	49.56% 282
Travel policy updates restricting business travel	56.59% 322
New best practices for gatherings	35.10% 199
Airline accessibility	33.15% 179
Airline fares	30.22% 162
Hotel and venue health and safety preparedness	38.29% 219
Hotel and venue availability	25.22% 143

	VERY CONCERNED
Hotel and venue service levels	32.09% 181
Hotel and venue pricing and rates	36.38% 207
Hotel commission policies	26.25% 126
Food-and-beverage safety	39.34% 225
Food-and-beverage pricing	40.60% 231



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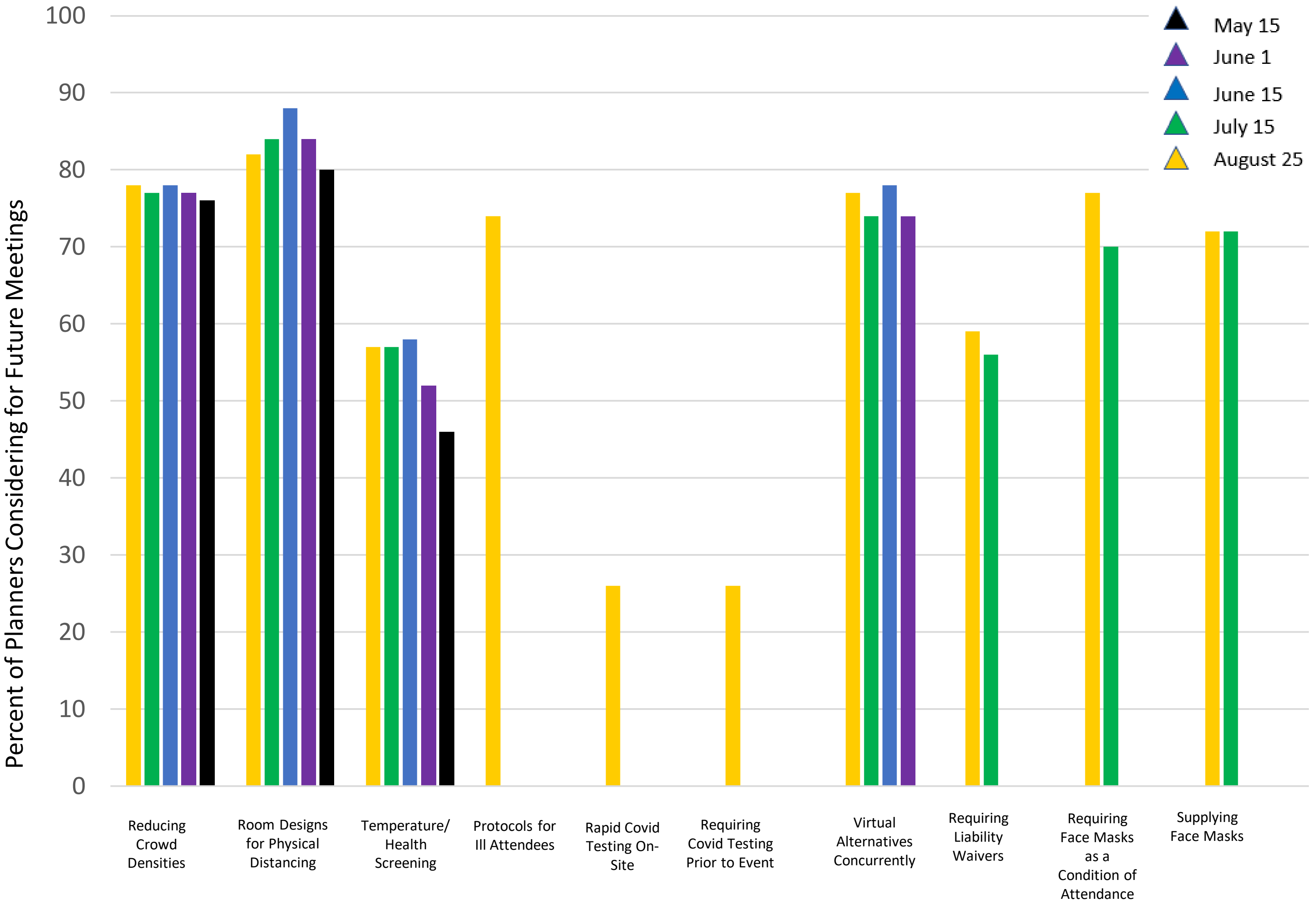
“Yes” to Distancing, Protocols, Face Masks; “No” to Testing

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

August 25 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	78.28%
Developing meeting room designs to encourage physical distancing	82.24%
Establishing protocols for attendees who are ill	74.14%
Providing temperature checks	57.07%
Providing rapid Covid-19 testing	25.69%
Requiring Covid test prior to the meeting	26.38%
Providing virtual alternatives concurrently with physical events	76.55%
Requiring liability waivers as a condition of attendance	58.97%
Requiring face masks as a condition of attendance	77.07%
Supplying face masks for attendees	72.24%



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As More is Learned About Virtual Events, More Planners Begin to Gain Confidence in Their Business Potential

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

August 25 Responses

	1-2	3	4-5
For attendees	22.81% 130	32.98% 188	44.21% 252
For sponsors	44.82% 251	35.71% 200	19.46% 109
For business objectives	27.29% 155	38.91% 221	33.80% 192
Not applicable	53.03% 70	30.30% 40	16.67% 22

In Summary:

- ✓ Majority of planners focused on Q2 '21 for rescheduled and new events.
- ✓ Is planning for '21 providing "light at the end of the tunnel"?
- ✓ Fear of travel and gathering are the biggest near-term obstacles.
- ✓ Rebooking remain the primary focus.
- ✓ The glass is half full – most planners are modestly confident about the near-term future (1-5 years) for live events.
- ✓ Planners are satisfied with industry leadership in this time of crisis.
- ✓ Greatest demand seen for meetings of less than 100 attendees, at boutique hotels and resorts.
- ✓ Protocols expected, but not Covid testing.
- ✓ Travel restrictions top concern.
- ✓ Virtual now looking more promising, business-wise.

- "We have to get over the fear factor and get back to traveling and meeting again."
- "There is no longer a 'going back to normal'. I'd like to be part of shaping the new normal, but I don't know where to begin."
- "I just held my annual event with significant safety protocols in place. It worked."
- "This is an exciting time in our industry. We can finally showcase the strategy that should have existed all along. The folks who think of themselves as 'planners' might not have a future here. But the folks who think of themselves as strategic advisors and producers will thrive."
- "We just hosted an annual local meeting. We capped attendance to allow for 6 feet social distancing, temperature checks, waivers, masks. We received nothing but compliments and there have been no Covid cases reported."
- "We are hosting our first event since March this weekend and to be honest, I am more nervous than I ever have been for an event. We are prepared and trained, but still nervous for the unknown and anxious thinking about dealing with people who aren't willing to follow protocols to keep everyone safe."
- "I'm expecting virtual for larger events until at least mid 2021 - smaller boutique physical events up until then too."