

PULSE SURVEY

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

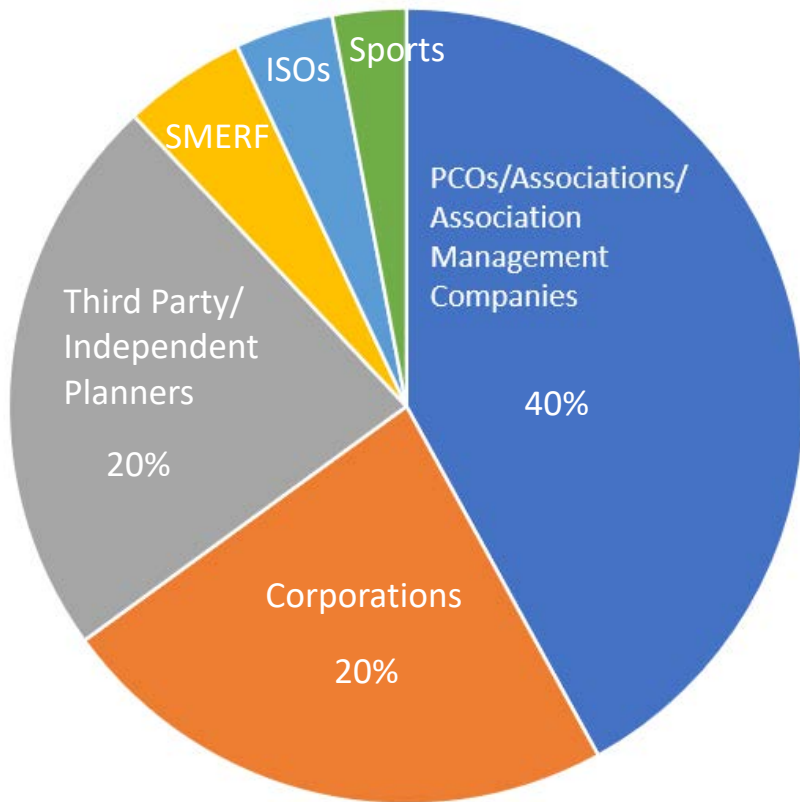
WEDNESDAY, JULY 15, 2020



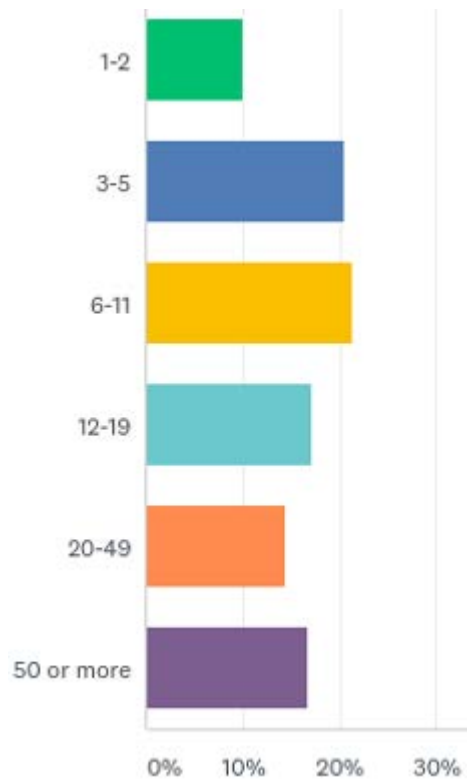
NORTHSTAR
MEETINGS GROUP

Respondents By Type, Volume and Size

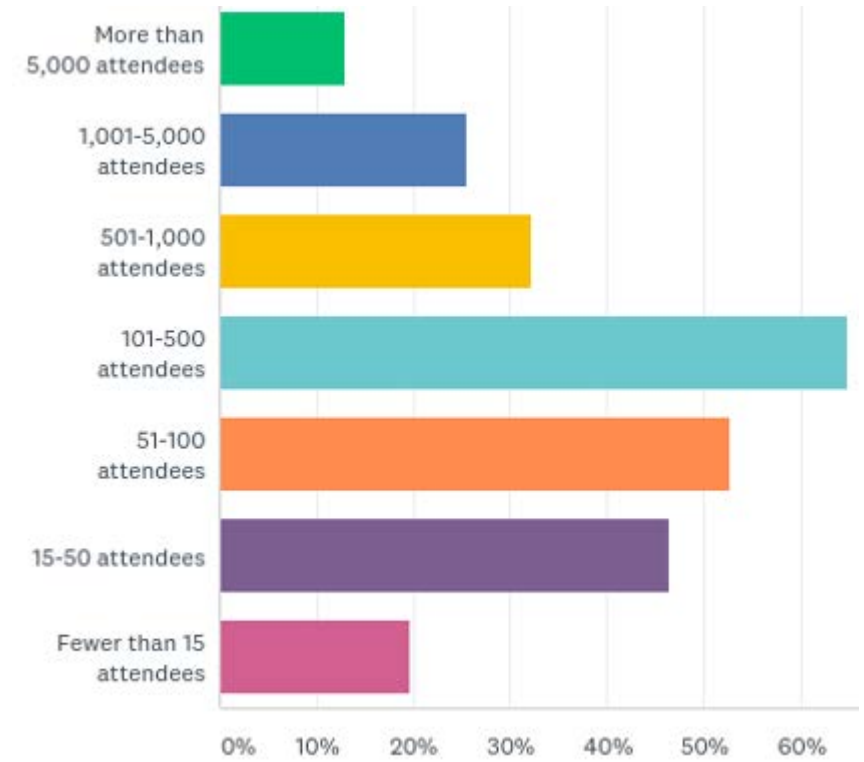
1,160 Valid Planner Responses



Type

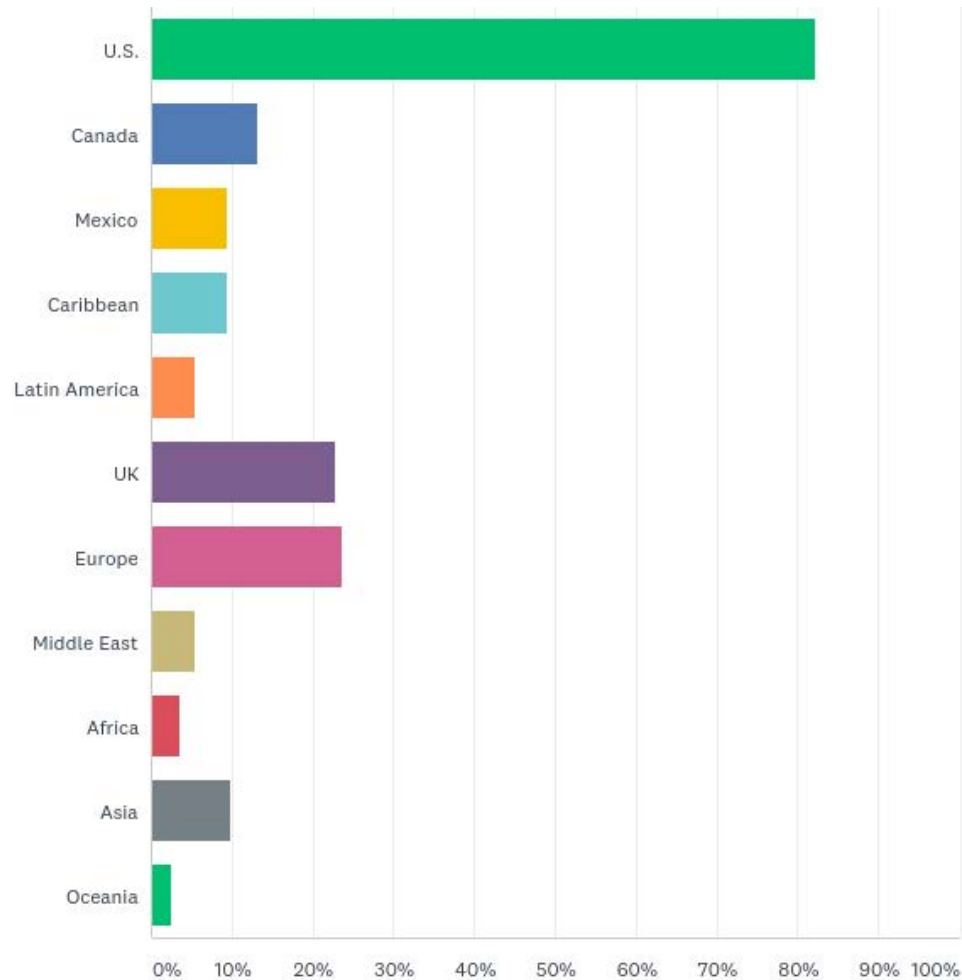


of Meetings

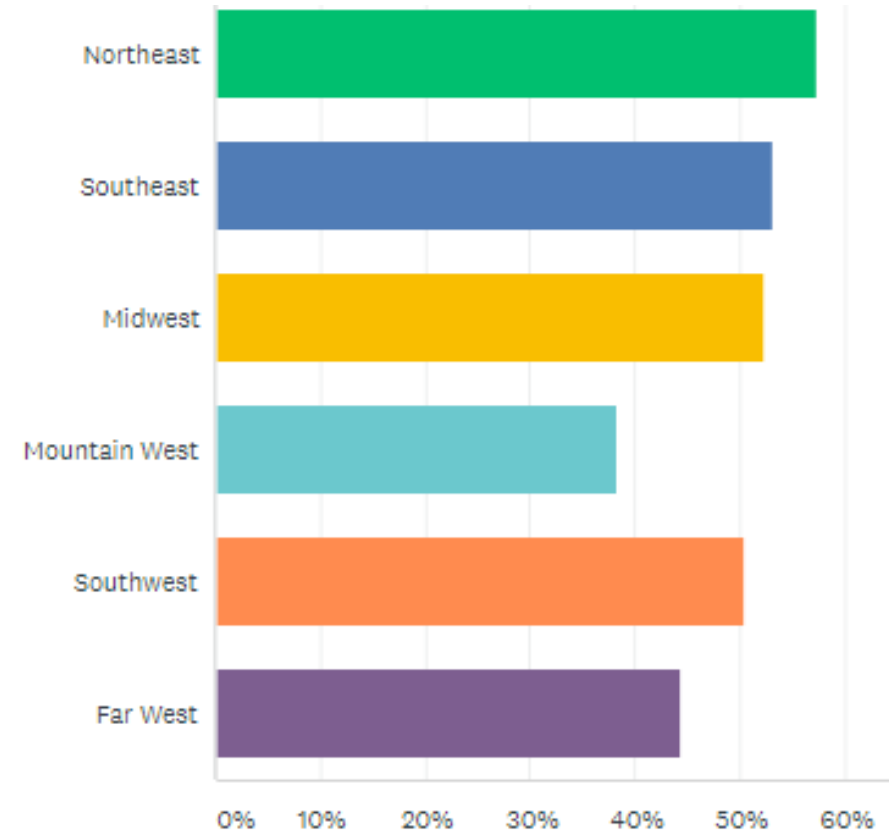


Size of Meeting

Respondents by Meeting Location



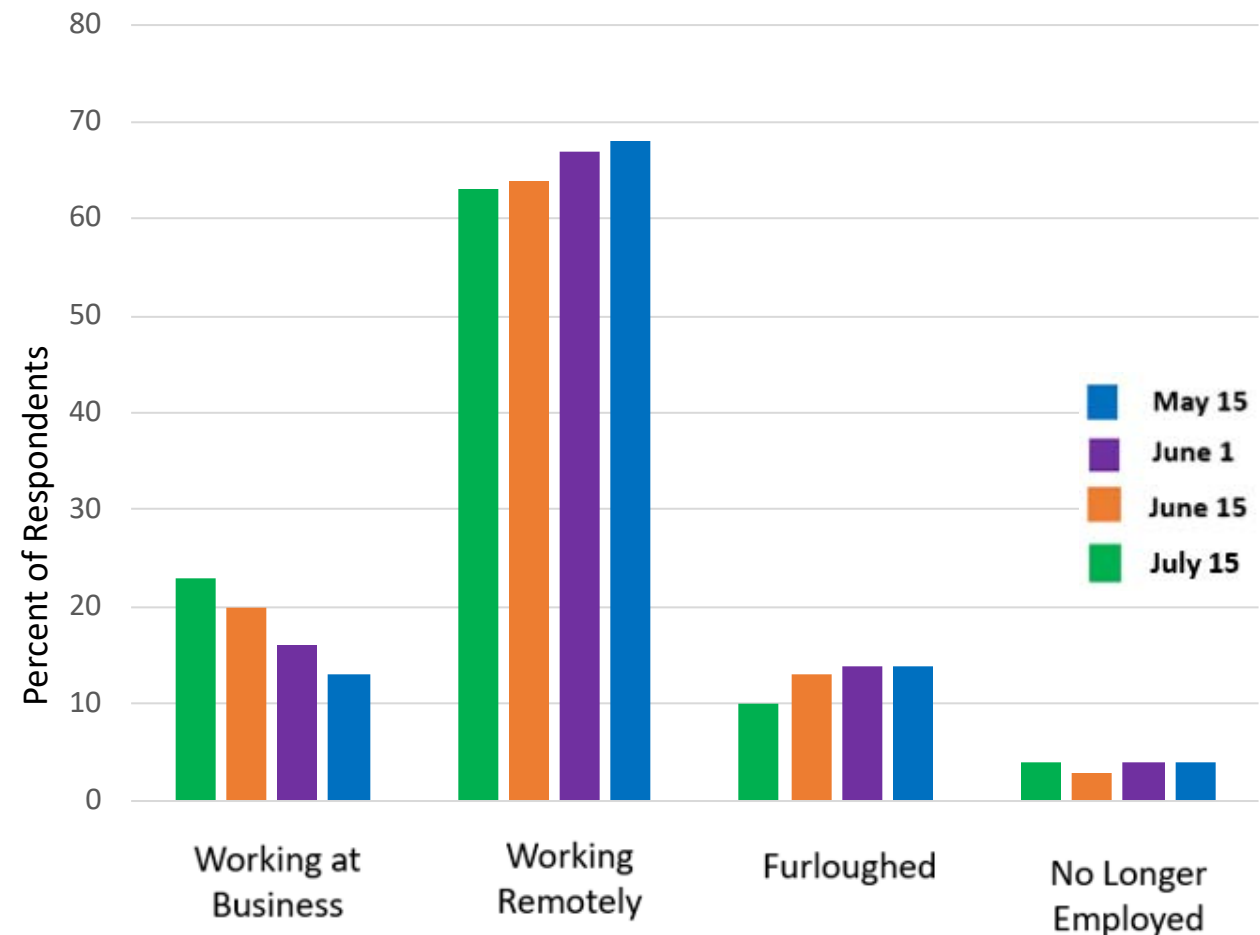
US Meeting Locations



Planners continue to return to their business locations, keeping pace with previous gains since mid-May

July 15 Responses

ANSWER CHOICES	RESPONSES
Working full time at a business location	22.00% 244
Working full time remotely	63.21% 701
Furloughed, I remain employed but I am now working part-time.	5.95% 66
Furloughed full-time, I remain employed but I am currently not working for a DEFINED period.	2.25% 25
Furloughed full-time, I remain employed but I am currently not working for an UNDEFINED period.	2.61% 29
No longer employed in the job I had prior to March 1, 2020, and I intend to seek work in the meetings/events industry.	3.25% 36
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.	0.72% 8
TOTAL	1,109

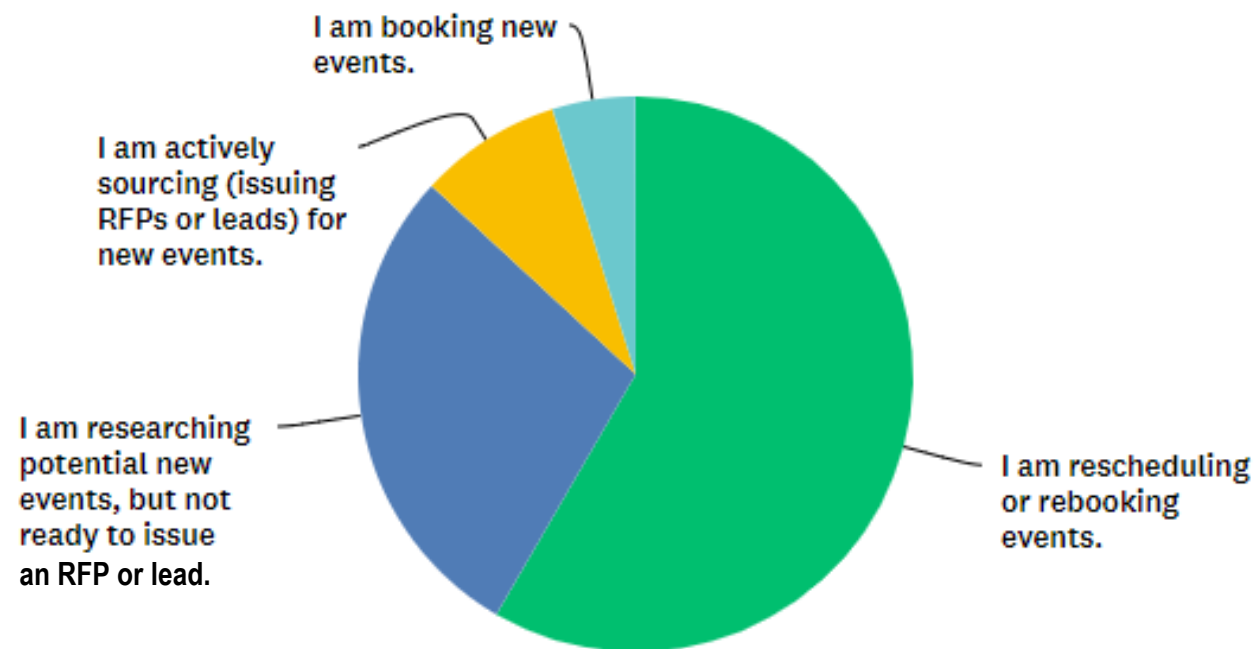


Rebooking is the Primary Focus

“Déjà vu all over again” for planners rescheduling events

July 15 Responses

ANSWER CHOICES	RESPONSES
I am rescheduling or rebooking events.	59.64%
I am researching potential new events, but not ready to issue an RFP or lead.	27.46%
I am actively sourcing (issuing RFPs or leads) for new events.	8.05%
I am booking new events.	4.85%



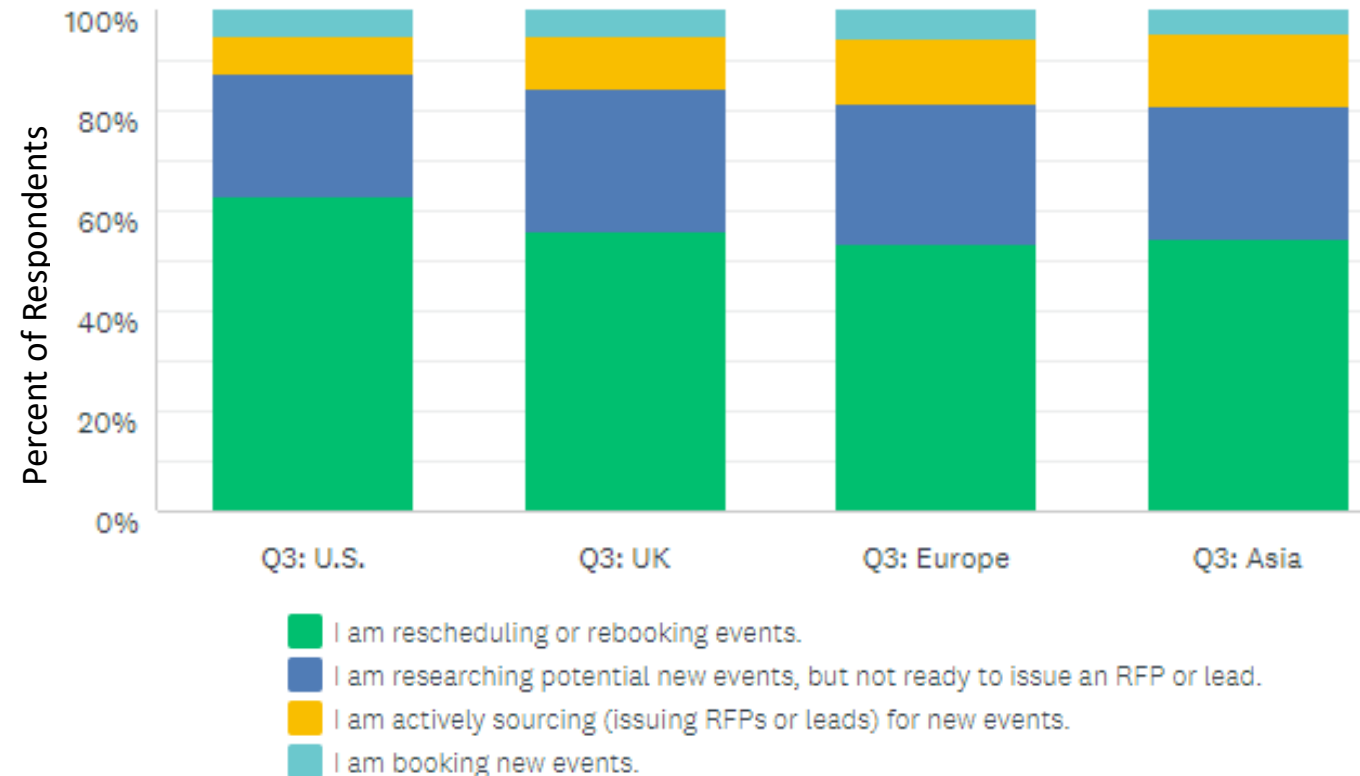
Around the World, Circumstances Begin to Deviate

US planners more inclined to rebooking, less inclined to new event sourcing

What is your current primary focus?
Are you rescheduling, booking, or researching?

July 15 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.
U.S.	63.25% 327	24.18% 125	7.54% 39	5.03% 26
UK	55.84% 86	28.57% 44	10.39% 16	5.19% 8
Europe	53.61% 89	27.71% 46	13.25% 22	5.42% 9
Asia	54.41% 37	26.47% 18	14.71% 10	4.41% 3



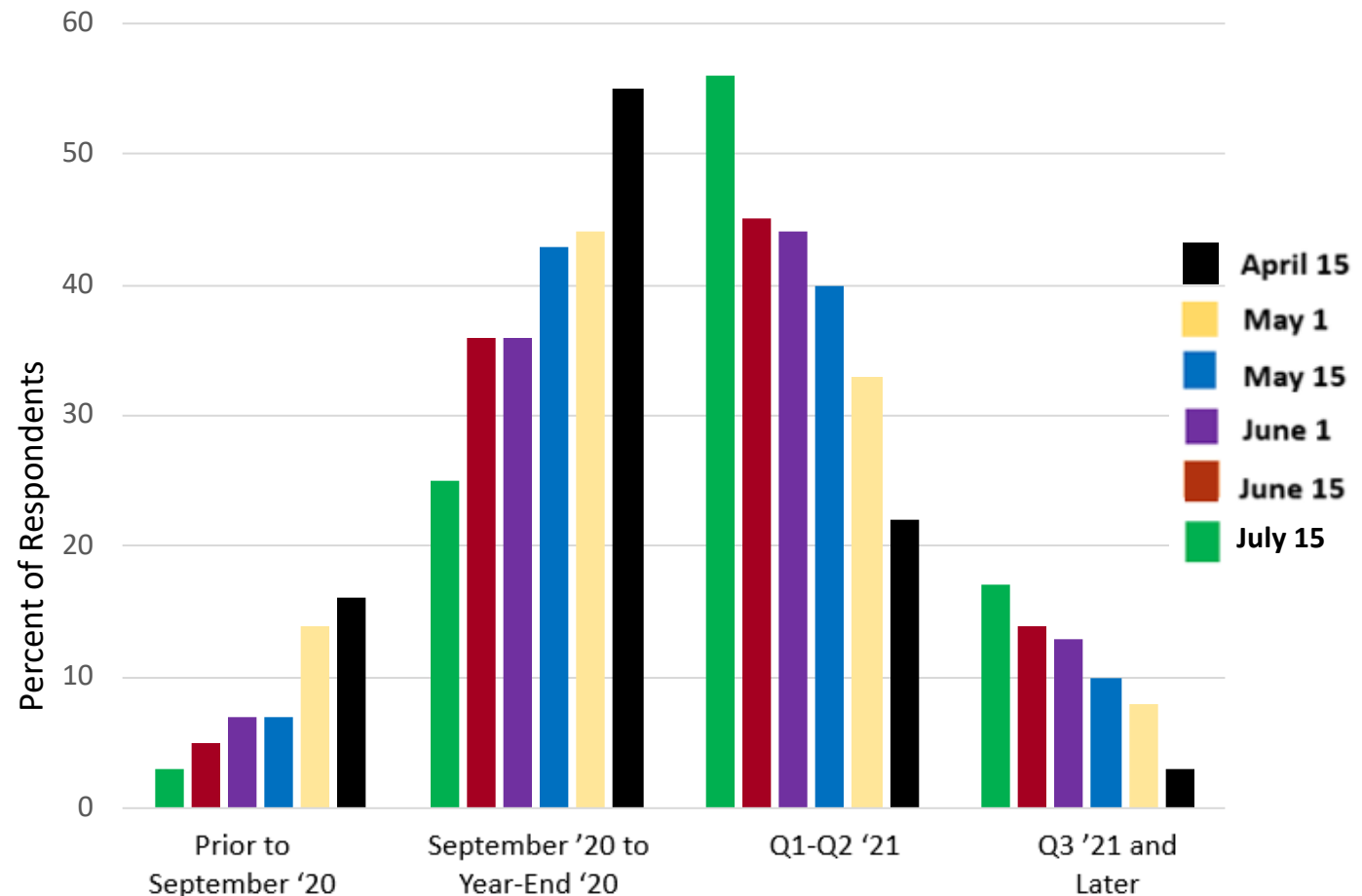
Expectations for Current Year Wane for Rescheduled Events

Planners looking to reschedule events in '20 down 25% from previous month

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

June 15 Responses

ANSWER CHOICES	RESPONSES
Prior to September 2020	3.09%
September to Year-End 2020	24.60%
Q1 2021	30.91%
Q2 2021	24.73%
Q3 2021	8.87%
Q4 2021	2.82%
Q1 2022 and later	4.97%

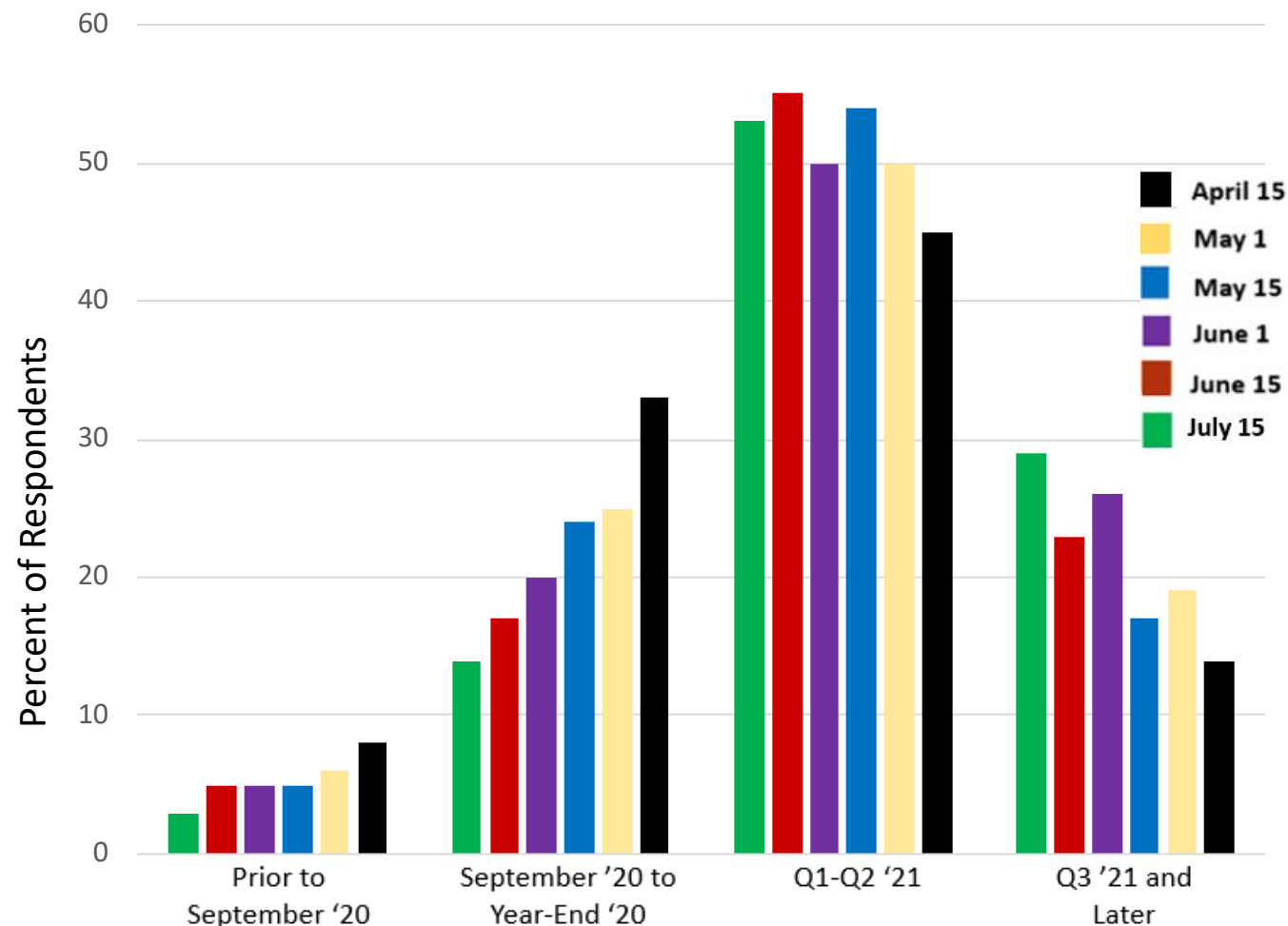


More Planners Now Looking a Year Out or More for New Events Interest in Q3 '21 and Later Grows Relative to the 1st Half of Next Year

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

July 15 Responses

ANSWER CHOICES	RESPONSES
Prior to September 2020	3.28%
September to Year-End 2020	14.21%
Q1 2021	30.60%
Q2 2021	22.81%
Q3 2021	12.02%
Q4 2021	4.78%
Q1 2022 and later	12.30%

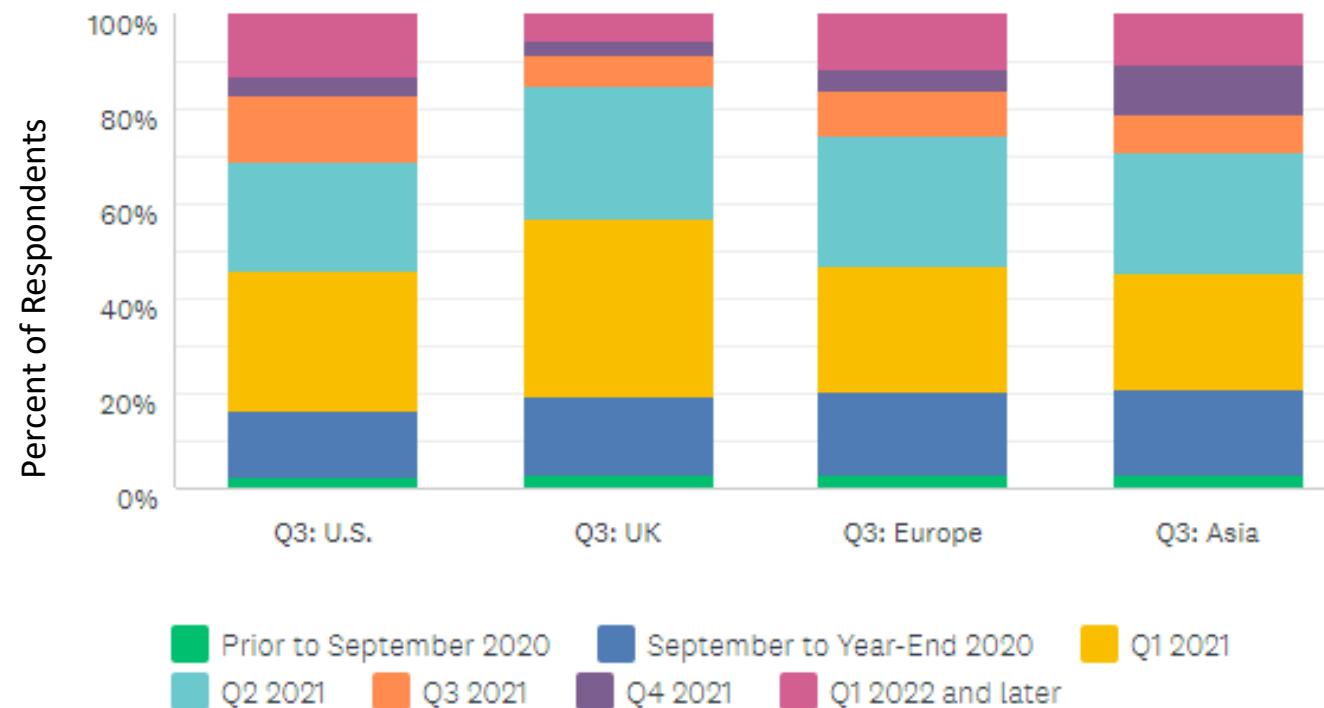


Expectations for New Events are “All Over the Map” With More Confidence for UK Events for 1H '21 a Notable Contrast

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

July 15 Responses

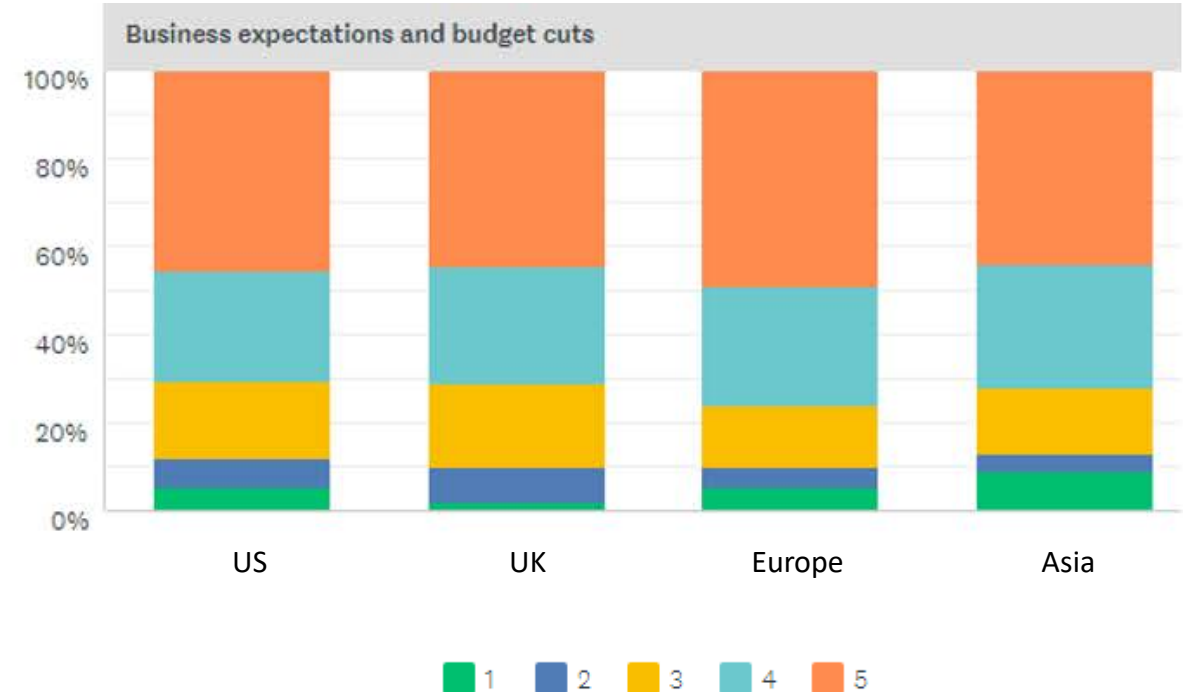
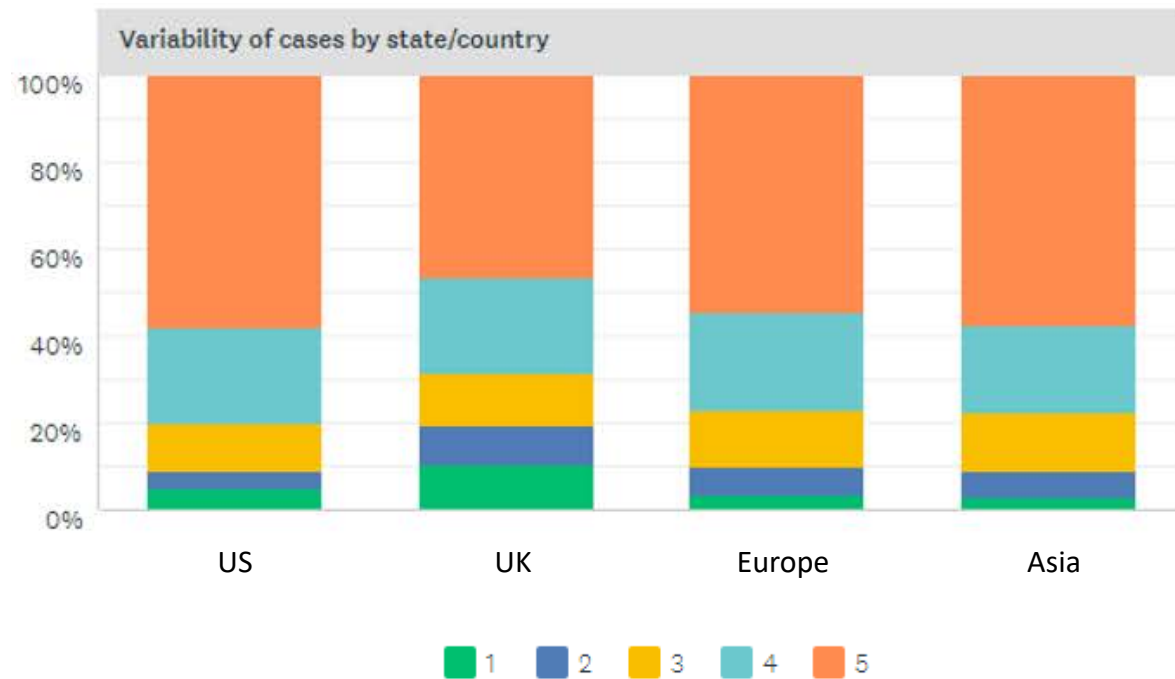
	PRIOR TO SEPTEMBER 2020	SEPTEMBER TO YEAR-END 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022 AND LATER
U.S.	2.68% 13	13.81% 67	29.28% 142	23.30% 113	13.61% 66	4.12% 20	13.20% 64
UK	2.76% 4	16.55% 24	37.93% 55	27.59% 40	6.90% 10	2.76% 4	5.52% 8
Europe	3.14% 5	16.98% 27	26.42% 42	27.67% 44	9.43% 15	4.40% 7	11.95% 19
Asia	2.99% 2	17.91% 12	23.88% 16	25.37% 17	7.46% 5	10.45% 7	11.94% 8



Has the Variability of Cases Affected Planner Confidence?

“Significantly” for Near-Term Events Relative to Business Expectations, Budget Cuts

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

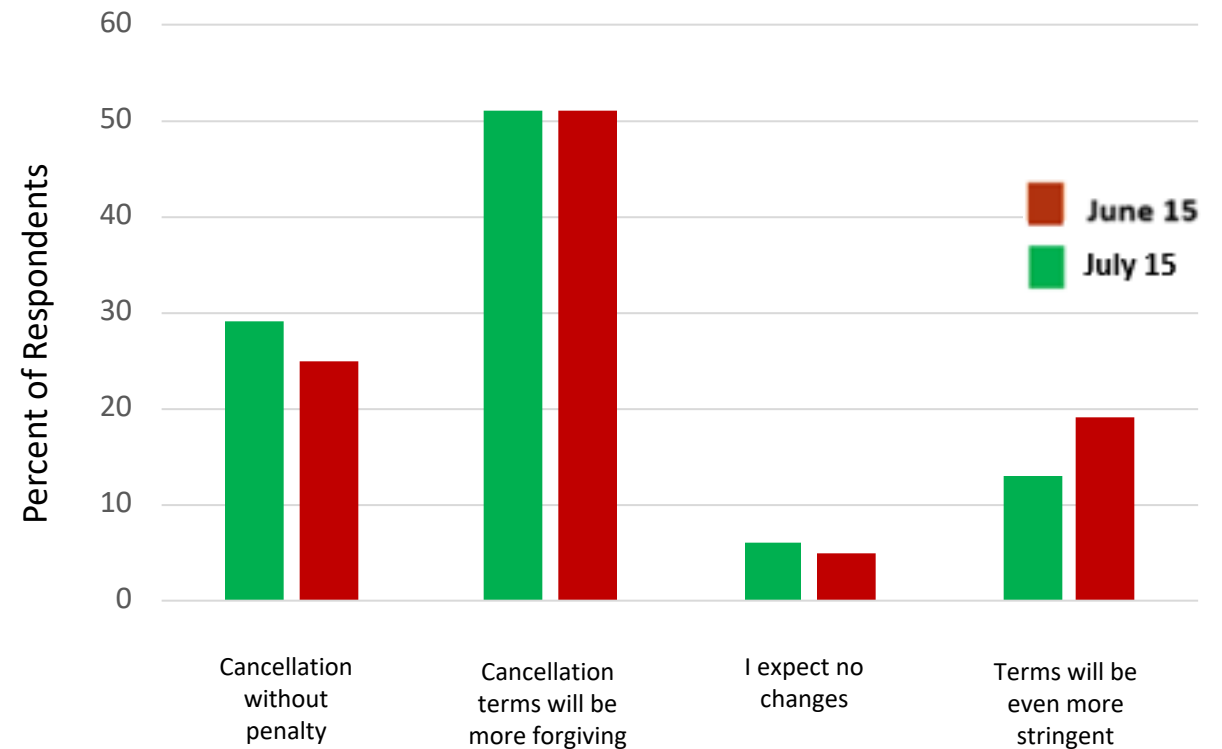


Planners are increasingly sanguine about contracts and cancellation terms

What are your expectations regarding cancellation clauses?

July 15 Responses

ANSWER CHOICES	RESPONSES
Contracts will allow for cancellation without penalty	29.37%
Cancellation terms will be more forgiving	51.27%
I expect no changes	5.95%
Terms will be even more stringent	13.42%



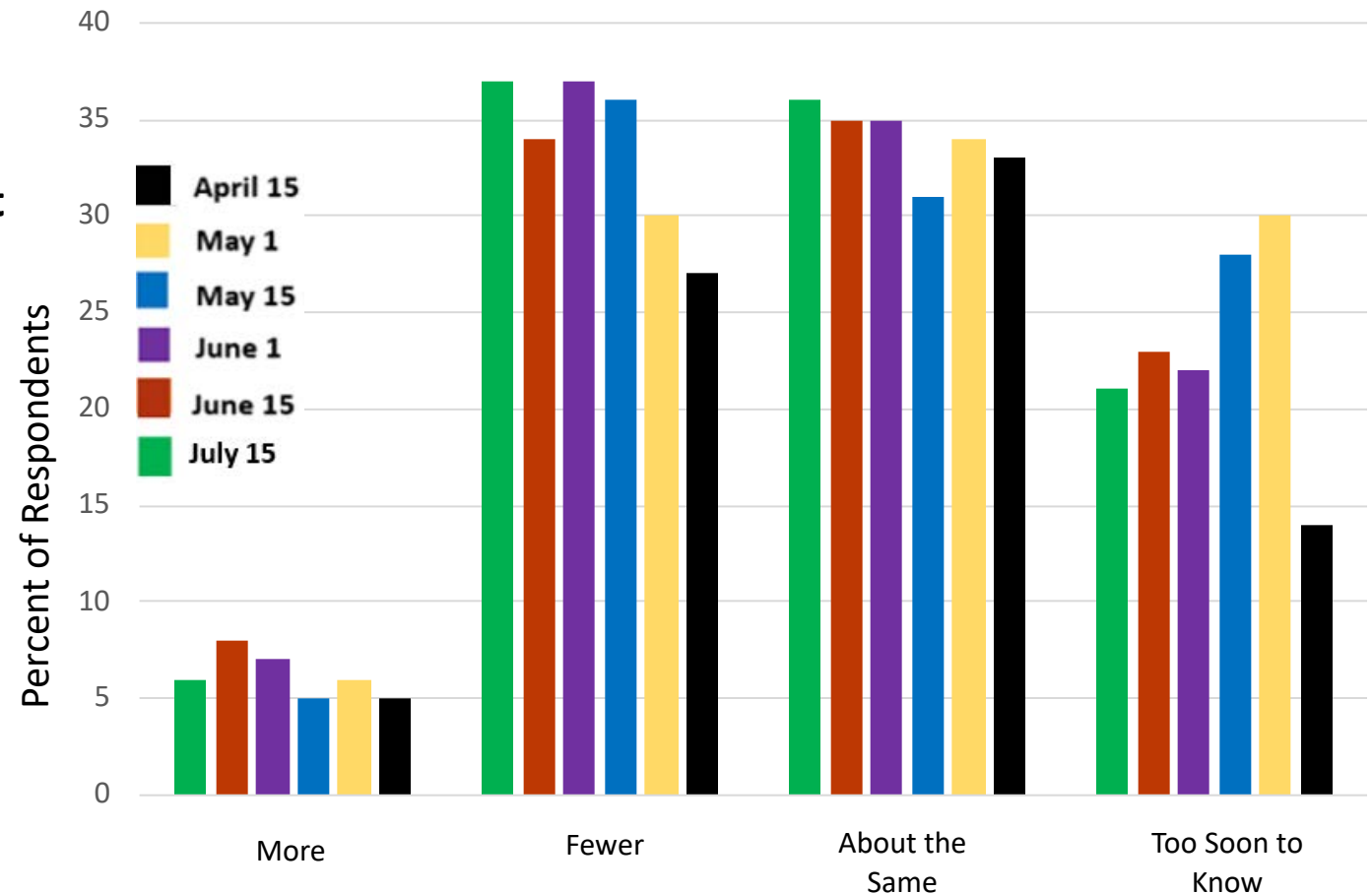
Fewer Events Continues to Be the Fear

Slight gain in early summer confidence retreats in July

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

July 15 Responses

ANSWER CHOICES	RESPONSES
More	5.71%
Fewer	37.31%
About the same	36.04%
It's too soon to know.	20.94%



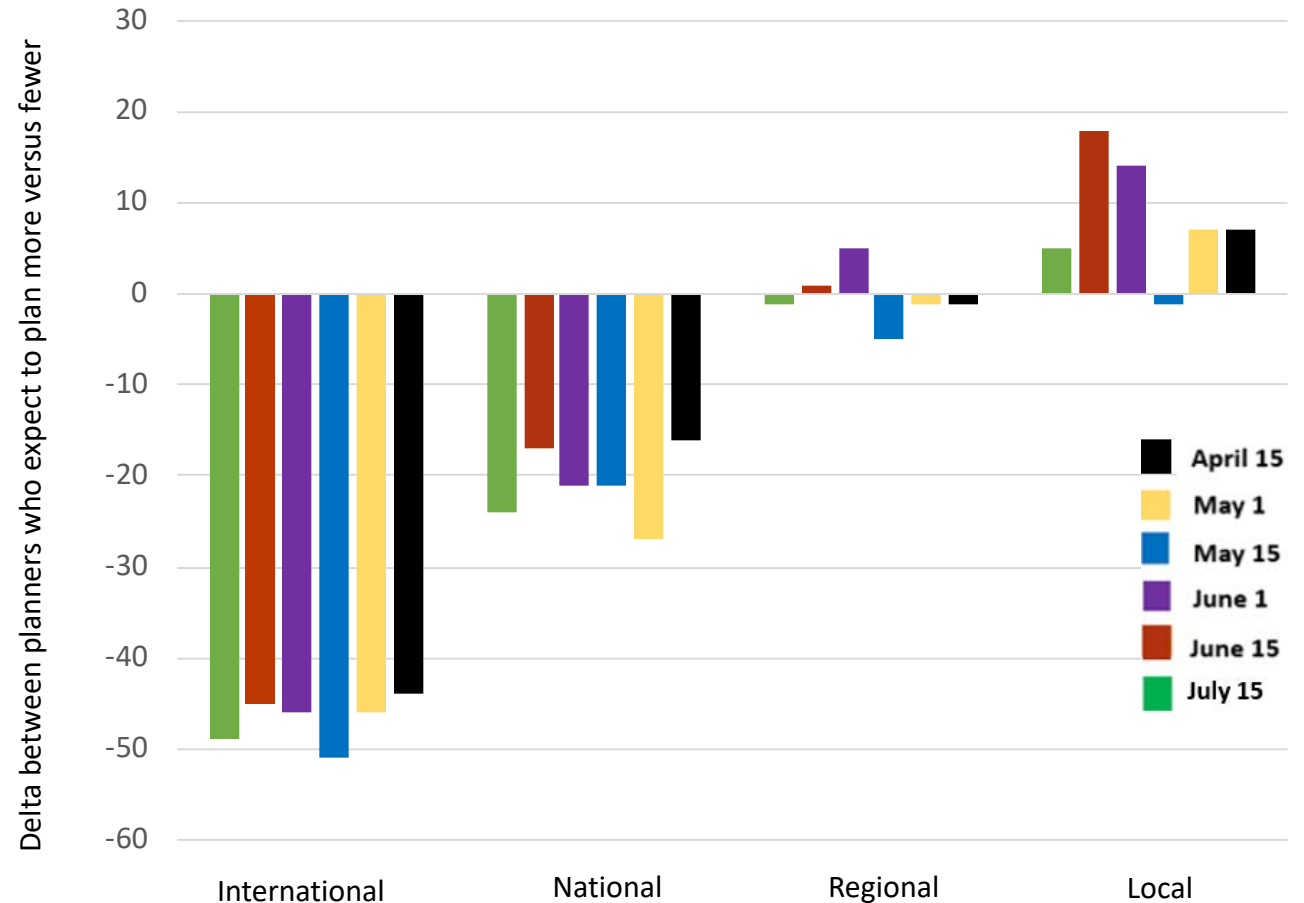
Will you plan more or fewer?

Local events see a marked decline in confidence as national, international events drop back

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

July 15 Responses

	MORE	FEWER
International	7.09% 29	55.99% 229
National	10.06% 63	34.19% 214
Regional	24.96% 145	25.82% 150
Local	26.77% 144	21.93% 118



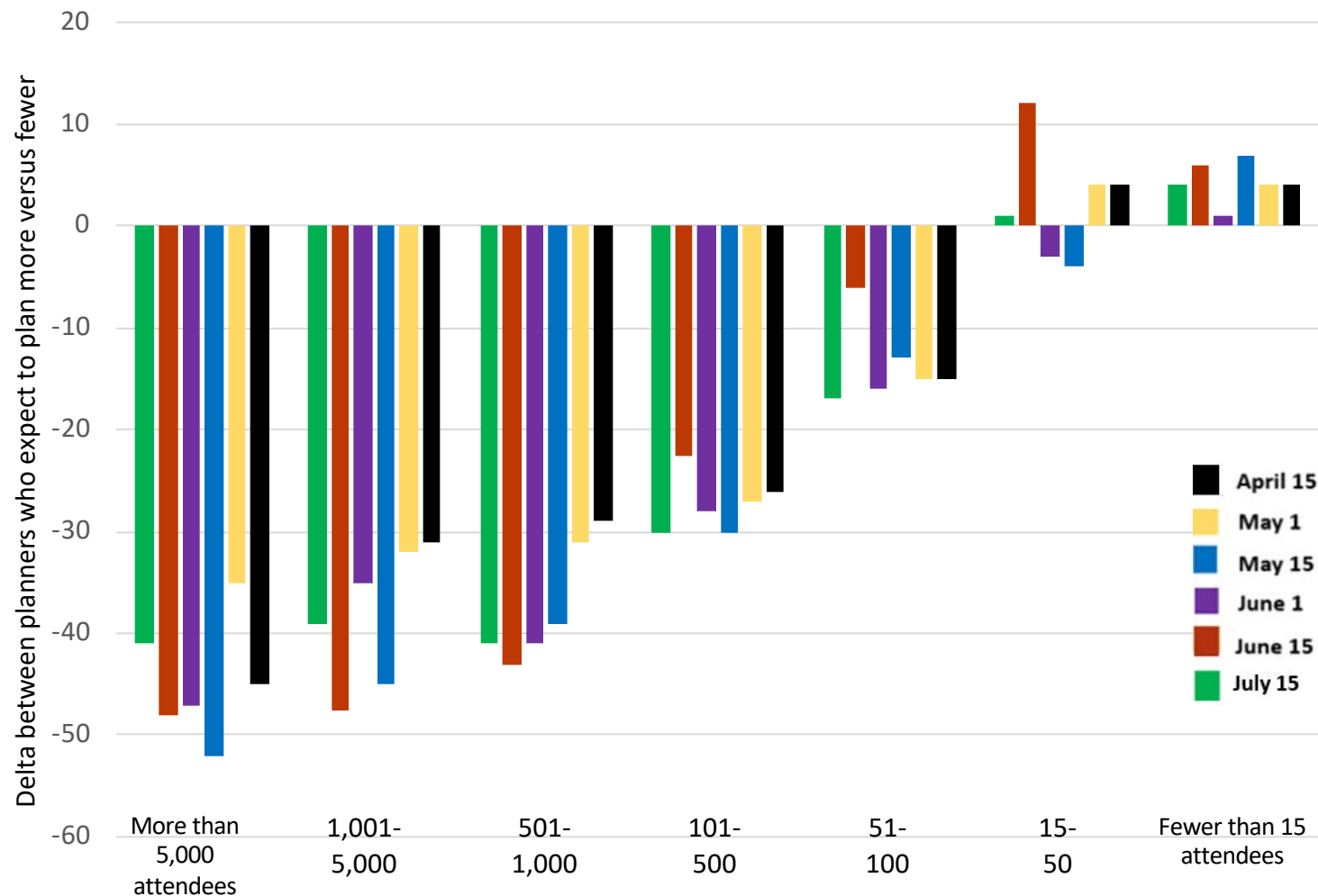
Will you plan more or fewer?

Expectations for meetings < 500 attendees drops, though still more likely than larger events

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

July 15 responses

	MORE	FEWER
More than 5,000 attendees	4.02% 8	45.73% 91
1,001-5,000 attendees	3.92% 12	42.81% 131
501-1,000 attendees	5.42% 20	46.34% 171
101-500 attendees	7.83% 48	38.17% 234
51-100 attendees	14.71% 89	31.40% 190
15-50 attendees	21.90% 129	21.39% 126
Fewer than 15 attendees	27.48% 108	23.66% 93

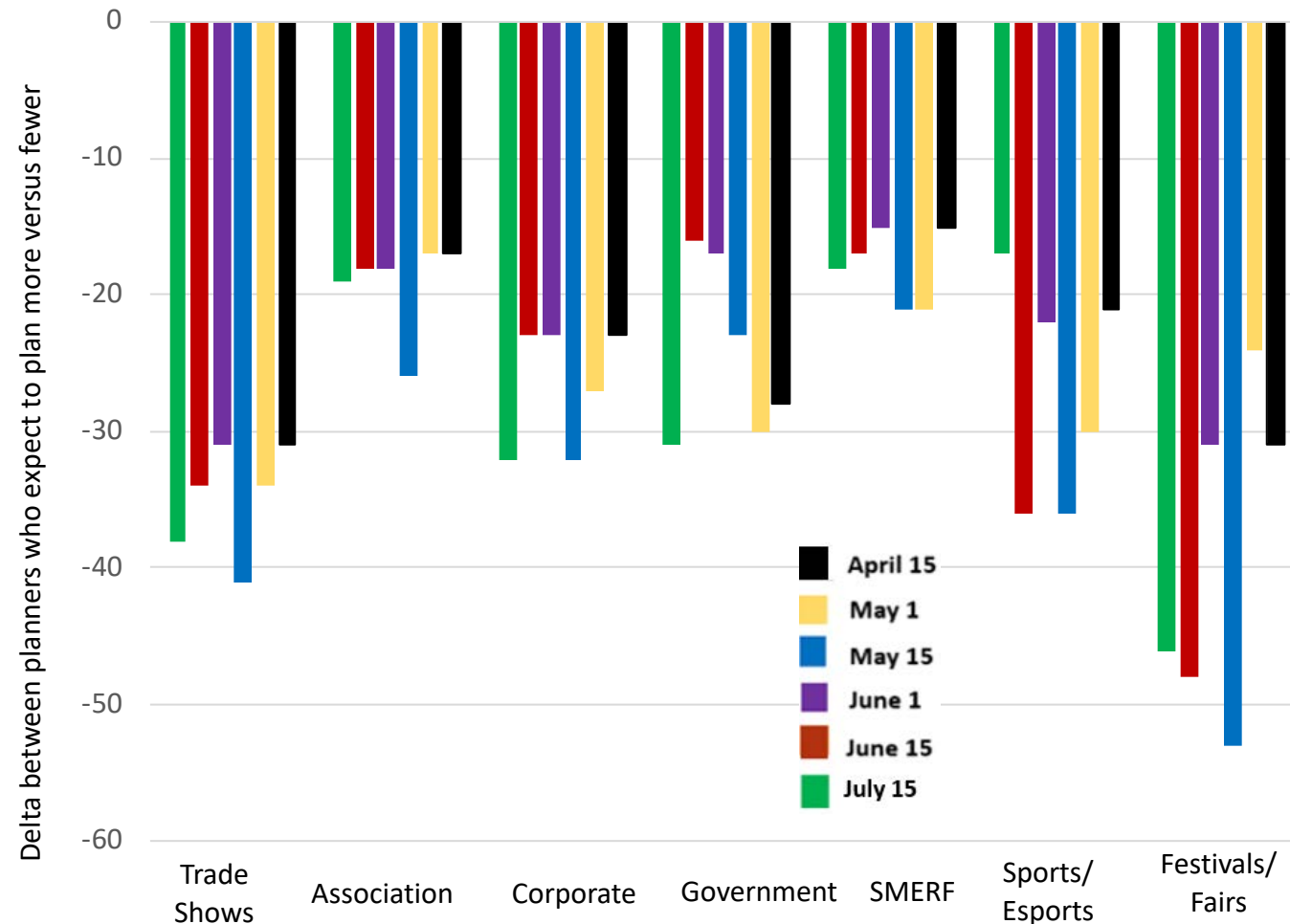


Sports a Bright Spot But Corporate, Government Events Lose Momentum

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

July 15 Responses

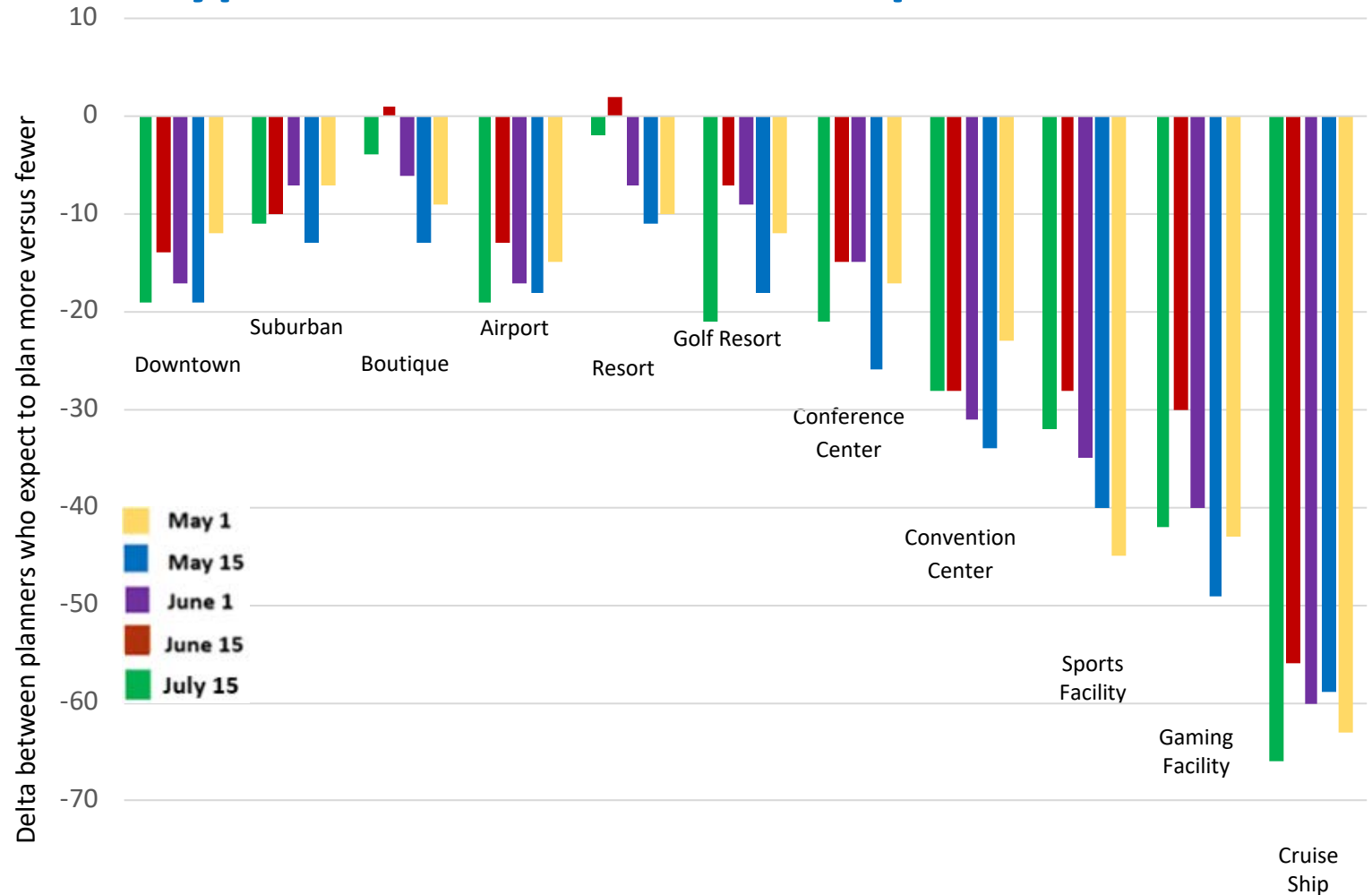
	MORE	FEWER
Trade Shows/Exhibitions/Congresses	2.68% 11	40.98% 168
Association	7.51% 29	26.42% 102
Corporate	8.94% 38	40.94% 174
Government	10.71% 15	41.43% 58
Social, Military, Education, Religion, Fraternal	13.53% 28	31.40% 65
Sports/Esports	19.57% 27	36.96% 51
Festivals/Fairs	9.02% 12	54.89% 73



Regardless of clean building standards, confidence that had been gaining for several meeting venue types has waned over the past month

July 15 Responses

	MORE	FEWER
Downtown Hotel	4.37% 29	23.08% 153
Suburban Hotel	9.55% 51	20.79% 111
Boutique Hotel	15.99% 75	20.26% 95
Airport Hotel	10.54% 41	29.05% 113
Resort	13.81% 75	15.65% 85
Golf Resort	10.25% 37	21.61% 78
Conference Center	7.10% 36	28.40% 144
Convention Center	5.43% 24	33.03% 146
Sports Facility/Stadium/Arena	9.41% 19	41.58% 84
Gaming Facility	5.88% 10	48.24% 82
Cruise Ship	6.38% 9	73.05% 103

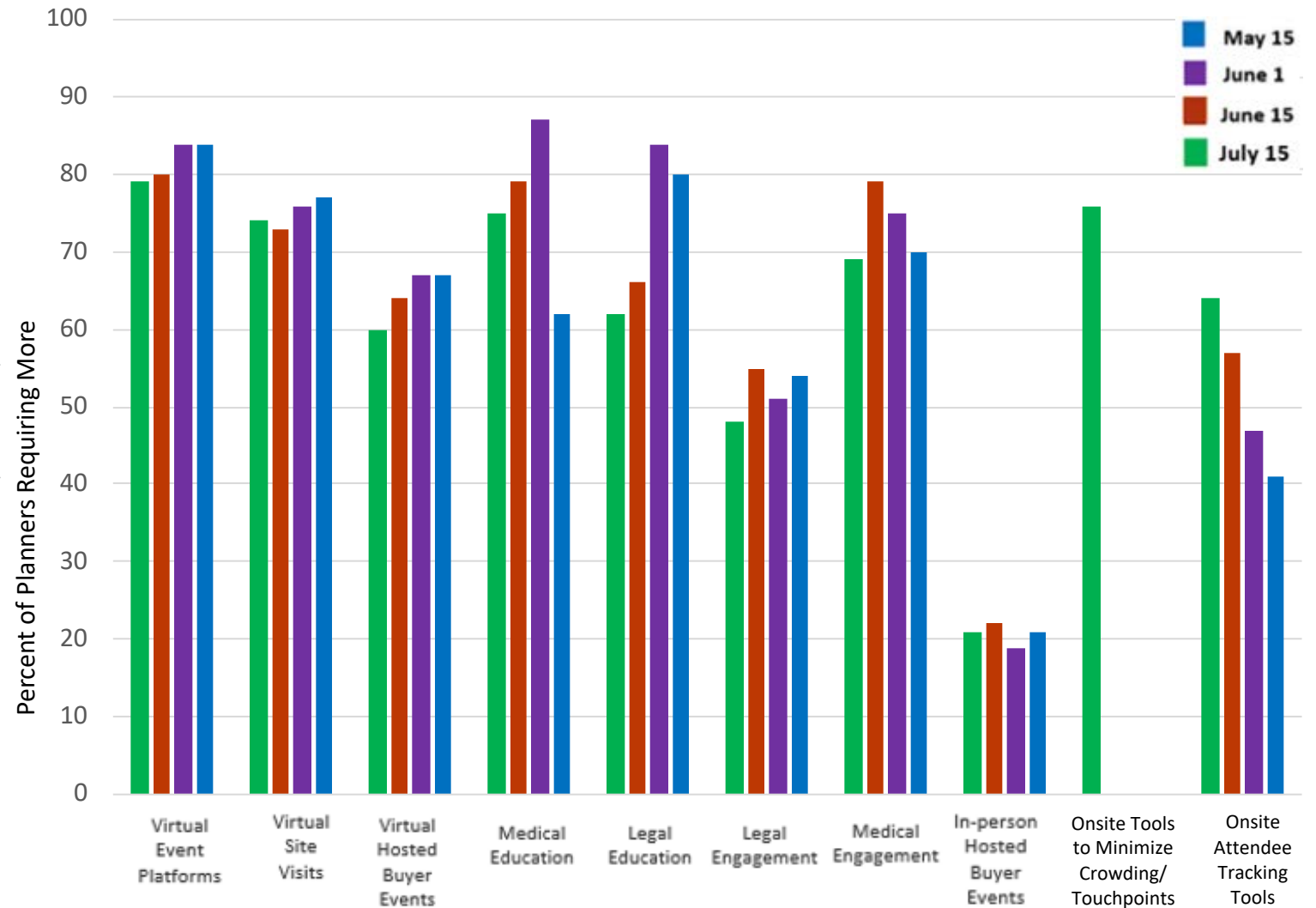


“Virtual” is still real, but onsite tools to help produce live events are needed

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

July 15 Responses

	MORE	FEWER		MORE	FEWER
Virtual event platforms	78.80% 576	8.07% 59	Virtual hosted-buyer events and fams to support buying decisions	60.19% 319	15.66% 83
Virtual site visits	73.86% 500	8.12% 55	On-site registration tools to minimize crowding and touch points	75.60% 536	6.49% 46
Education specific to legal matters	62.11% 400	3.88% 25	On-site attendee-tracking tools	64.29% 387	7.31% 44
Education specific to health/medical safety matters	74.67% 507	3.98% 27			
Engagement of professional legal advisory services	47.55% 282	5.40% 32			
Engagement of health/medical safety advisory services	68.65% 427	4.66% 29			
In-person, hosted-buyer events and fams to support buying decisions	21.10% 115	39.45% 215			

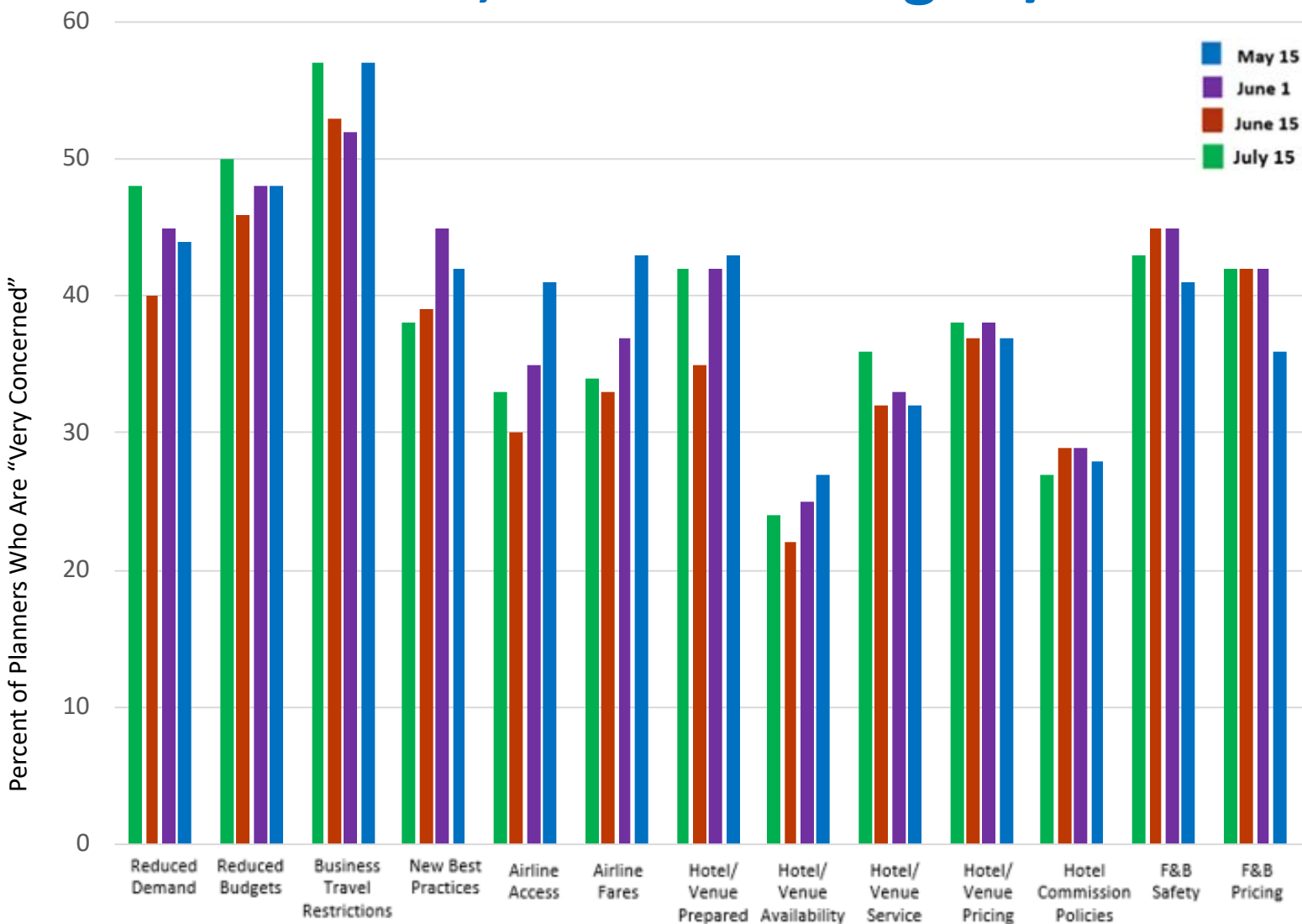


Top Concerns: Business Travel Restrictions, Reduced Budgets/Demand

How concerned are you about the following?

July 15 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	47.93% 370	Hotel and venue service levels	35.55% 273
Reduced meeting and event budgets	50.84% 393	Hotel and venue pricing and rates	37.92% 292
Travel policy updates restricting business travel	57.14% 436	Hotel commission policies	26.69% 170
New best practices for gatherings	37.84% 291	Food-and-beverage safety	42.78% 329
Airline accessibility	32.83% 239	Food-and-beverage pricing	42.37% 325
Airline fares	33.88% 248		
Hotel and venue health and safety preparedness	41.91% 324		
Hotel and venue availability	24.22% 186		

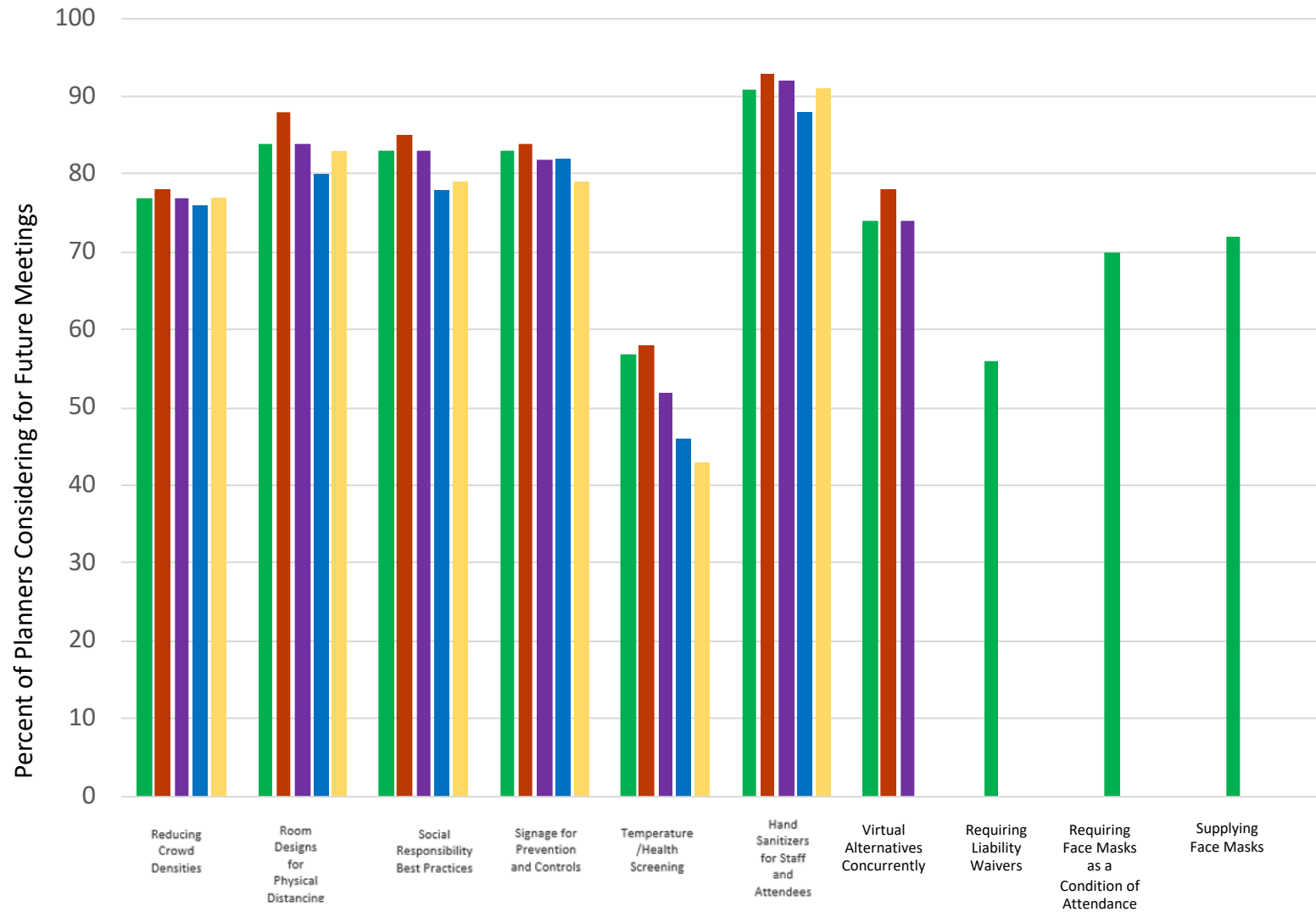


The Face Mask Debate?: 70% of Planners Will Require *and* Supply Them

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

July 15 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	77.40%
Developing meeting room designs to encourage physical distancing	83.71%
Putting into place social responsibility best practices, including protocols for attendees who are ill	83.33%
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	82.70%
Providing temperature/health screening	57.20%
Providing hand sanitizer on-site for staff and attendees	91.16%
Providing virtual alternatives concurrently with physical events	73.74%
Requiring liability waivers as a condition of attendance	56.44%
Requiring face masks as a condition of attendance	70.08%
Supplying face masks for attendees	72.10%



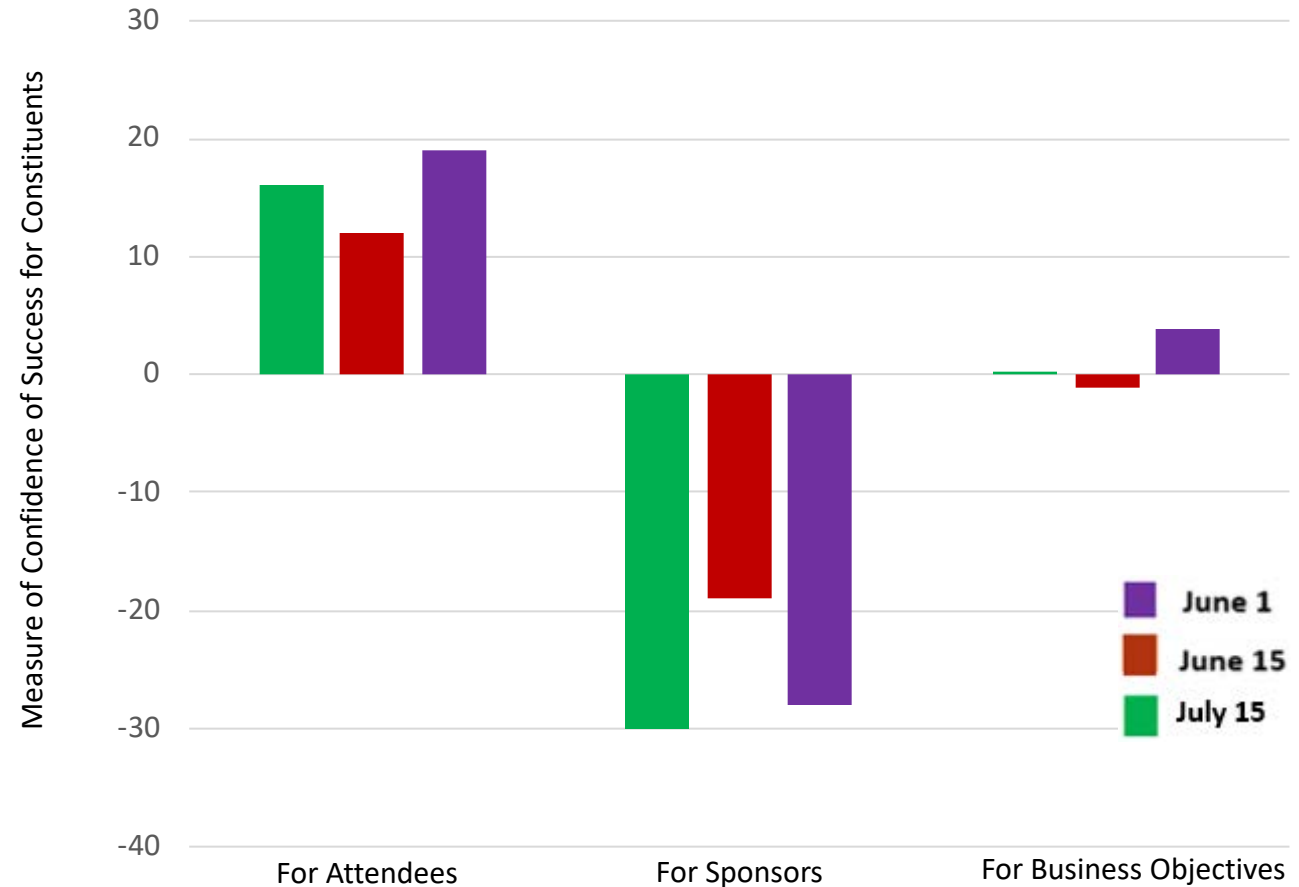
Is Virtual an Opportunity or a Threat?

The virtual events business model remains elusive

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

July 15 Responses

	1-2	3	4-5
For attendees	26.38% 205	31.02% 241	42.60% 331
For sponsors	49.40% 372	31.47% 237	19.12% 144
For business objectives	32.86% 254	34.02% 263	33.12% 256
Not applicable	60.51% 95	21.66% 34	17.83% 28



In Summary:

- ✓ Fewer events continues to be the big fear
 - ✓ Confidence gained in June erased in July
 - ✓ Increase in cases a key downward driver
 - ✓ Even small, local events -- once a bulwark against the tide -- see a decline in confidence
 - ✓ Rebooking is the primary focus . . . again!
 - ✓ Expectations for actualizing current year events drops considerably
 - ✓ New events show more promise outside the US
 - ✓ More planners are now looking a year out (or later) to book their new events
 - ✓ Planners anticipate continued contract resiliency, flexibility
 - ✓ As soon as live events come back, planners will require (and supply) masks
 - ✓ Planners embrace virtual, but reluctantly
- “We are rebooking cancelled events although we’ll have fewer participants and smaller budgets. Uncertainty remains our biggest enemy.”
 - “Pricing and contracting – to buyers’ favor – must change to get meetings back.”
 - “Virtual events have been added to our portfolio, but in-person events will remain key. What we need is government or venue protocols for health and safety. It will be useful to have international guidance that event organisers can follow.”
 - “The back-and-forth dance of open, close, open, close makes it impossible to plan for in-person events. Opinions, perceptions change daily.”
 - “I’m concerned about live events over the next two years and am considering what other options I have for employment. I have done one virtual event and that looks to be my immediate future, though it’s not something I’m interested in long-term.”
 - “Relationships are key to business success, and they can’t be made and cultivated virtually. Meetings and events are essential to business development. There’s both a direct and indirect relationship between meetings and economic growth. We won’t have a healthy travel industry or overall economy without being able to gather again.”