

PCMA CONVENE

COVID-19 SURVEY

SURVEY DATES: FEBRUARY 8-14, 2022

COVID-19 Recovery Dashboard

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When we surveyed planners and suppliers in mid-December, the Omicron variant was just starting to cause COVID cases — and therefore the business events industry's concerns — to rise. As we've learned during COVID times, the space of a few months can bring fresh challenges and new realities, so what changed between December and mid-February, when nearly 500 respondents — 300 planners and 192 suppliers — participated in our latest Dashboard survey?

For one, we're a more hopeful group: 56 percent of planners described themselves as hopeful in February compared to 49 percent in December; and 58 percent of suppliers expressed optimism in this survey, up 15 percentage points from December. As many parts of the world are seeing COVID cases decline after a spike caused by Omicron, planners and suppliers are making more deliberate plans and have firmer expectations about upcoming in-person and hybrid events.

On the mood scale, fewer planners reported feeling anxious about the future — 18 percent compared to 32 percent in December, and 14 percent of suppliers expressed anxiety vs. 20 percent in December. But nearly one-third of planners, up a few points from December, report feeling exhausted and burned out. That is likely due to the continued strain of another two months spent planning events in a constantly shifting environment.

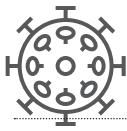
Although we seem to be on the downside of Omicron, it still remains a major concern, causing 11 percent of planners to cancel their in-person events, more than double the percentage of planners who said the same in December. Nonetheless, 31 percent are moving forward with their physical event vs. 24 percent in the previous survey, and 27 percent vs. 24 percent in the previous survey are holding hybrid events. Around one out of 10 is polling potential registrants to get a sense of their

willingness to travel, up from 5 percent in December. Most telling is that only 14 percent are taking a wait-and-see approach — in December, three out of 10 said they were unable to make a decision until closer to the event date.

All told, nearly half will be holding an in-person-only event in 2022; 35 percent digital only; and 41 percent hybrid, down from 46 percent who selected hybrid in December. While organizers said planning a hybrid event remains a major financial challenge, it came in second in this survey in terms of budgeting hurdles for the first time. A more pressing challenge now is how to budget for their face-to-face events, a sign that attendee and exhibitor willingness to travel remains difficult to gauge. Thirty-six percent of planners expect an up-to-50-percent decline in registration numbers at their 2022 events compared to their pre-COVID events and more than one-third said they are unable to estimate registration numbers. One planner said the challenge is ensuring hard-cost expenses like F&B minimums and AV “without really knowing what attendance turnout will be.”

Since many are facing the prospect of lower attendance, we asked whether planners are considering co-locating an upcoming in-person event with another group. Only 14 percent are weighing that option. One of those is a planner at a national association that is looking to partner with state associations and other partners.

And if you were to presume that planners and suppliers are more comfortable moving forward with in-person events because they have more fully embraced requiring proof of vaccination at their events, you would be wrong. There's not much movement there, with 61 percent of planners requiring proof of vaccination vs. 59 percent in December, and a larger percentage — 65 percent vs. 59 percent — not requiring proof of a booster.



In fact, a greater percentage of planners this month — 37 percent, up from 30 percent in December — said they are not requiring proof of vaccination. They cited several reasons, including objections over personal freedoms, following local mandates in the host destination rather than setting their own policy, politics, and a preference for testing rather than proof of vaccination. Proof of vaccination, wrote one planner, “doesn’t prove anything. Omicron has proved that even the vaccinated can get it and spread it. Consequently, we should be testing everyone, vaccinated or not.”

“The best way to control the contagion is protocols,” wrote one planner, saying the vaccination just helps to avoid complications. The events that require vaccination, this planner reasoned “are the most dangerous, because people relax their [behaviors] and many times don’t respect protocols and social distancing.”

We asked about requiring proof of a negative COVID test result for the first time in this Dashboard, and more than a quarter of planners said proof of a negative test result will be required in lieu of proof of vaccination; 12 percent are requiring it along with vaccination; and roughly half are not requiring negative test results at all. The majority — 56 percent — said they would require either PCR or rapid test results, but PCR was the more popular choice — 28 percent PCR vs. 16 percent rapid.

Some planners expressed concern that we may be thinking we can put COVID in the rear-view mirror and resume holding events like in 2019. Said this planner: “Confused by the belief that we are returning to a time of ‘see the pretty birdie’ — what my grandmother said when things were unpleasant — as if COVID, Vegas massacre, 9/11, etc., never happened.”

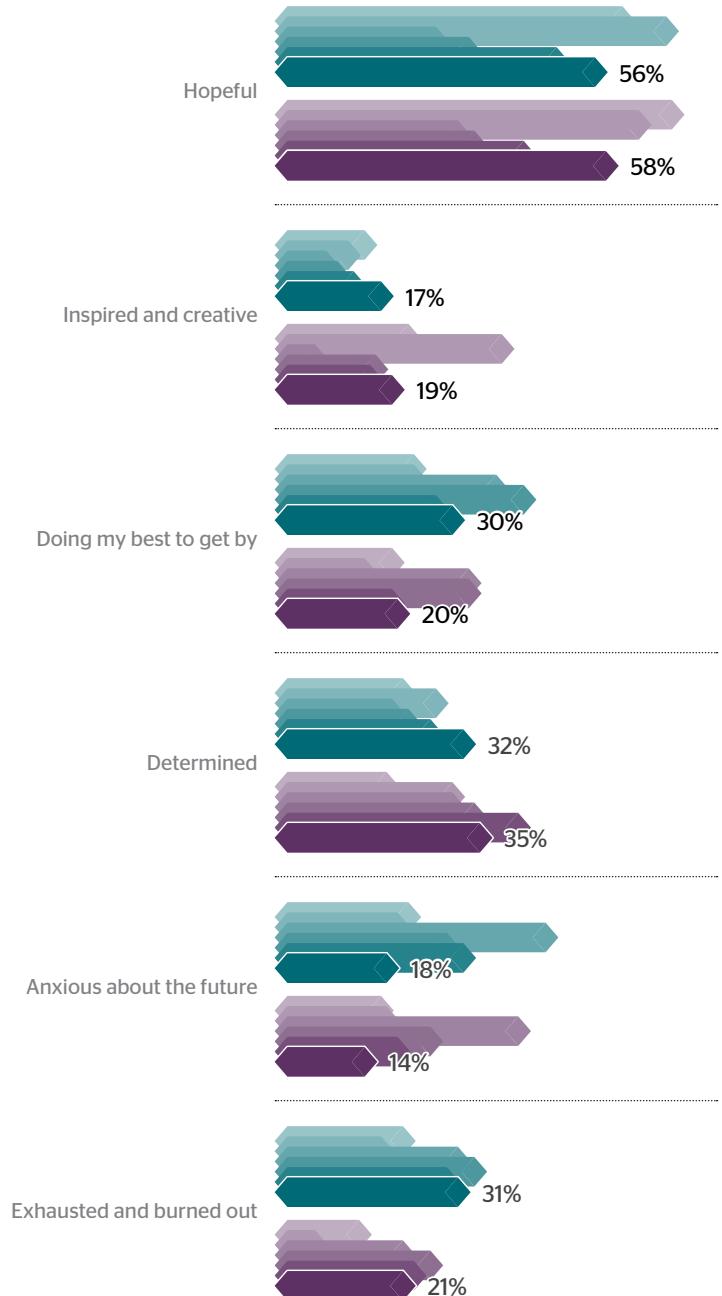
Others were more resolute that the show must go on. “While I absolutely respect every person’s right to set their own boundaries,” this planner said, “the valid option of getting back to normal needs to be, well, normalized. So let’s get back out there!” Echoing that sentiment, a supplier wrote: “I believe it is ‘Game on.’ This fall will be crazy busy.”

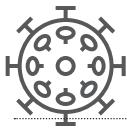
As my grandmother used to say, “From your mouth to God’s ears.”

Curt Wagner is an associate editor at *Convene*. Kayla Feldstein is a digital marketing associate at PCMA. Michelle Russell is *Convene*’s editor in chief.

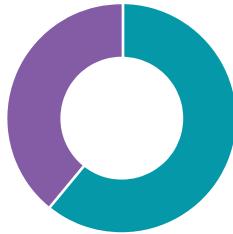


We appreciate your input in this survey. We’d like to check in with you first. What best describes how you’re feeling right now? (Choose all that apply.)





What best describes your role in the business events industry?



61% Business events professional

39% Supplier serving business events professionals

What region best represents where you do the majority of your business?



81% U.S.

7% Canada

4% APAC Region

7% EMEA region

1% Latin America



76% U.S.

10% Canada

3% APAC Region

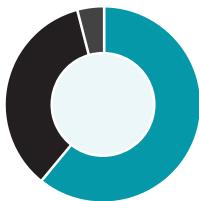
11% EMEA region

1% Latin America

PLANNER TRACK

SUPPLIER TRACK

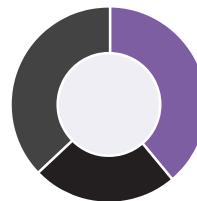
Will you require attendees, staff, and visitors to show proof of vaccination in order to participate in your face-to-face or hybrid event?



61% Yes

35% If you're not requiring proof of vaccination, why?

4% N/A



39% Yes

24% If you're not requiring proof of vaccination, why?

37% N/A

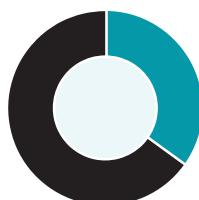
PLANNERS SPEAK

"Yes, however, states are rapidly changing their requirements, so we will abide by the state mandates, whatever those may or may not be at the time of our meeting (March 25-29, 2022)."

SUPPLIERS SPEAK

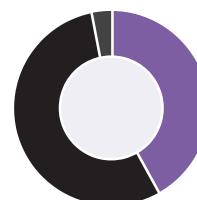
"We require staff to be vaccinated, but as an event venue, we allow the client the right to determine their protocols for their own events. As a DMO (we are both), we work with many venues that all have different policies."

If requiring proof of vaccination, will you also be checking for booster status?



35% Yes

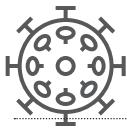
65% No



42% Yes

55% No

3% N/A



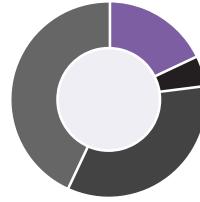
PLANNER TRACK

SUPPLIER TRACK

Will you be asking for proof of a negative COVID-19 test?

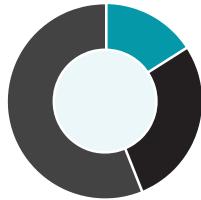


26% Yes, in lieu of proof of vaccination
12% Yes, along with proof of vaccination
51% No
10% Not applicable

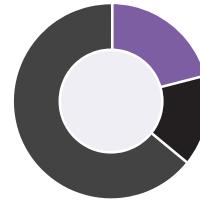


18% Yes, in lieu of proof of vaccination
5% Yes, along with proof of vaccination
34% No
43% Not applicable

If you will be asking for proof of a negative COVID test, please share what kind of test (rapid, PCR, either), and the timeline of results for admittance to the event.



16% Rapid
28% PCR
56% Either



21% Rapid
15% PCR
65% Either

PLANNERS SPEAK

"Day of and testing throughout the program."

"This is optional and provided daily on site for attendees and ALL vendors/staff."

SUPPLIERS SPEAK

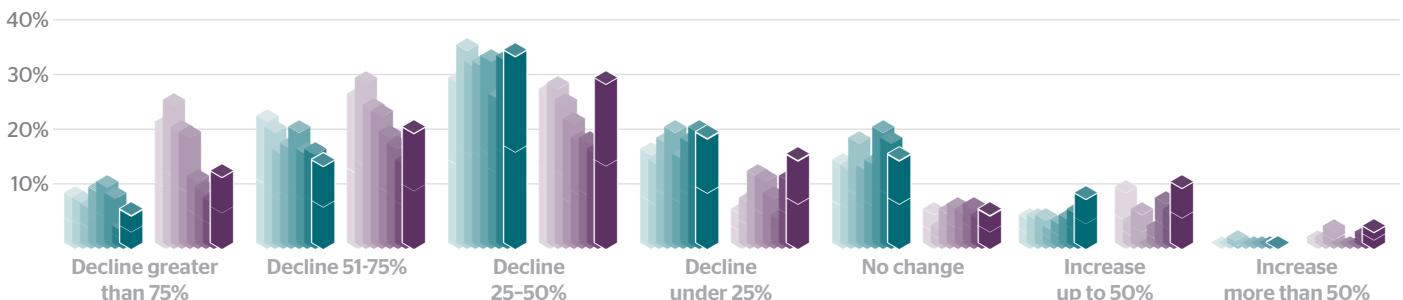
"Tests are requested in lieu of vaccination only if individual is unable to get vaccinated due to medical or religious reasons; negative result must be within 24 hours."

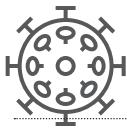
MAR **APR** **MAY** **JUNE** **AUG** **SEPT** **DEC** **FEB**

PLANNER TRACK

SUPPLIER TRACK

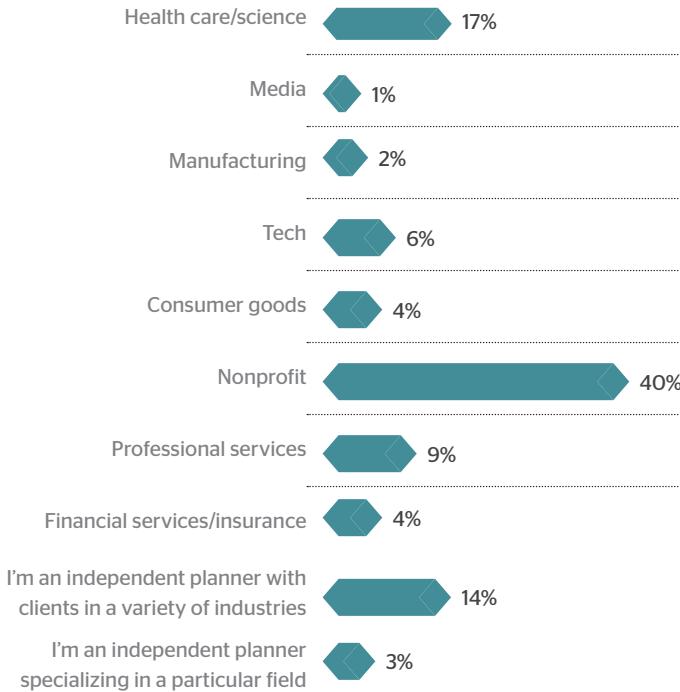
What do you believe will be the overall revenue impact of COVID-19 on your events-related business for 2021?and the timeline of results for admittance to the event.



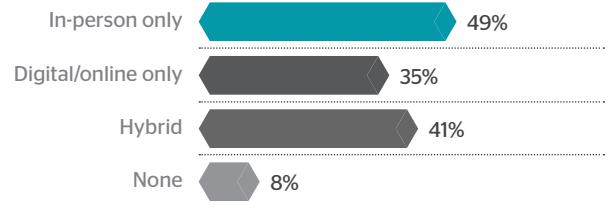


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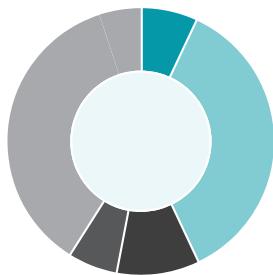
What best describes the industry you represent?



What type of event are you planning in Q1-2 2022? (Choose all that apply.)



What kind of overall registration numbers are you expecting for your planned 2022 in-person-only event vs. 2019 (or pre-pandemic 2020)?



- 7%** Decline greater than 50%
- 36%** Decline up to 50%
- 10%** Same
- 6%** Increase up to 50%
- 0%** Increase of more than 50%
- 36%** Unable to estimate until we get closer to the scheduled event date due to a fluid COVID environment
- 5%** N/A

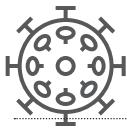
Has the identification of the Omicron variant – or rising COVID cases – changed your plans for in-person and hybrid events scheduled in the coming months?



- 11%** Yes, we are canceling our in-person event for digital only.
- 2%** Yes, we are canceling our in-person event with no digital version offered.
- 31%** No, we are moving forward with our in-person event.
- 27%** No, we are moving forward with our in-person/hybrid event.
- 14%** We're taking a wait-and-see approach and closely monitoring the situation in our host destination.
- 5%** We're regularly polling our potential registrants to gauge their in-person attendance comfort level before making a decision.
- 11%** Other

PLANNERS SPEAK

"We pulled back on in-person events and shifted back to fully virtual events after the Delta variant. We are hopeful we can return to in-person and hybrid events this fall but are ready to pivot as needed based on the evolution of the ongoing pandemic."



PLANNER TRACK

What is your planning window for in-person or hybrid events in Q1-Q2 2022?



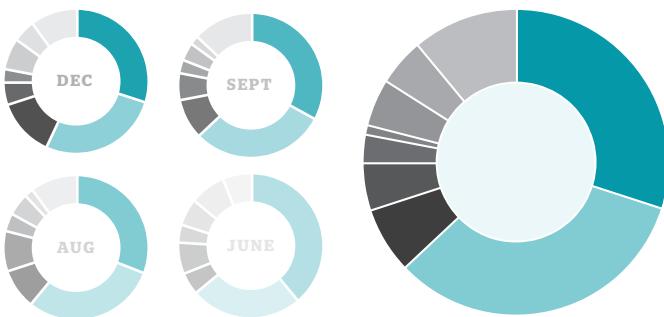
- 11%** We are making a go/no-go decision within four months of event date.
- 15%** We are making a go/no-go decision within three months of event date.
- 26%** We are making a go/no-go decision within two months of event date.
- 31%** Not applicable
- 18%** Other

PLANNERS SPEAK

“We made our go/no go decision for our March 2 live event on February 7. Normally this event was 250 people, we decided to decrease the expectation to 50 and go forward with the live event.”

“We made the decision about our January 2022 Annual Meeting three weeks before the event to go from hybrid to fully virtual.”

What is your biggest financial challenge with regard to planning a business event in Q1-Q2 2022?
(Please choose one.)

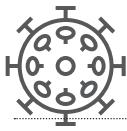


- 30%** Budgeting/pricing for a hybrid (in-person + digital) events
- 33%** How to budget in terms of face-to-face attendance expectations
- 7%** Expenses related to enhanced hygiene and sanitary standards at a face-to-face event
- 5%** Navigating registration timelines/deadlines to budget for a hybrid event
- 3%** What to charge digital participants
- 1%** What to charge digital event exhibitors/sponsors
- 5%** Expenses related to event marketing and communications in a post COVID-19 world
- 5%** Deciding on registration pricing for face-to-face participants
- 12%** Other

PLANNERS SPEAK

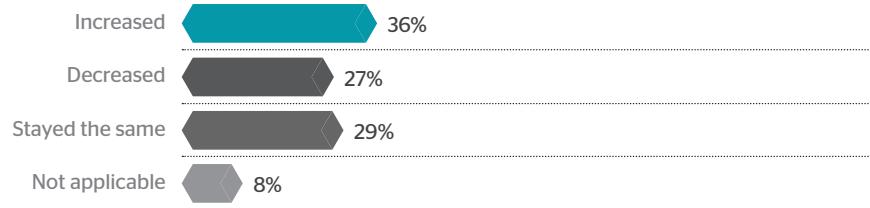
“Costs and time related to making attendees feel safe.”

“Vendors can’t supply products to the show because of shortages and waiting for production parts and trucks.”



PLANNER TRACK

When planning for upcoming in-person or hybrid events, compared with 2019, has your budget:



If you are planning a hybrid event, how do you foresee it taking shape?

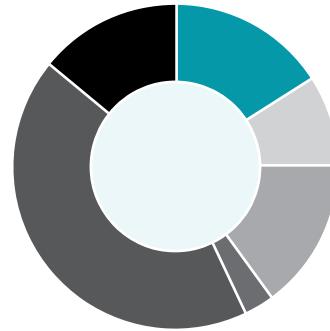
PLANNERS SPEAK

“Recording less than 10 percent of sessions during the in-person conference and offering a virtual ‘best of’ event two months later that will be free.”

“We are not sure if we will provide live hybrid, or if we will record live events and offer the recordings live at a future date.”

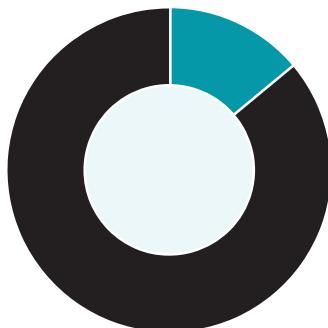
“Medium-sized citywide, with lower attendance than normal years, and a virtual event three weeks later. Two different audiences and registrations, same content.”

“Emphasis is on the live event with all main and secondary education provided virtually.”



- 16%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, with ability for both audiences to interact via the event platform
- 9%** Simultaneous, small in-person event with streaming video and separate online program for virtual audience, without ability for both audiences to interact via the event platform
- 15%** Simultaneous, small in-person event with streaming video for virtual audience; no separate online content for digital participants
- 3%** Hub-and-spoke model: small regional in-person events held simultaneously with separate content for digital audience
- 43%** N/A
- 15%** Other

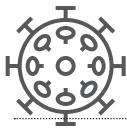
Are you considering co-locating an upcoming in-person event with another event in a related profession or sector to maximize attendance?



14% Yes
86% No

PLANNERS SPEAK

“We are planning a trade show and we are allocating up to 12 educational programs and congresses. It means that we are allocating 12 small events into the show to boost the attendance.”



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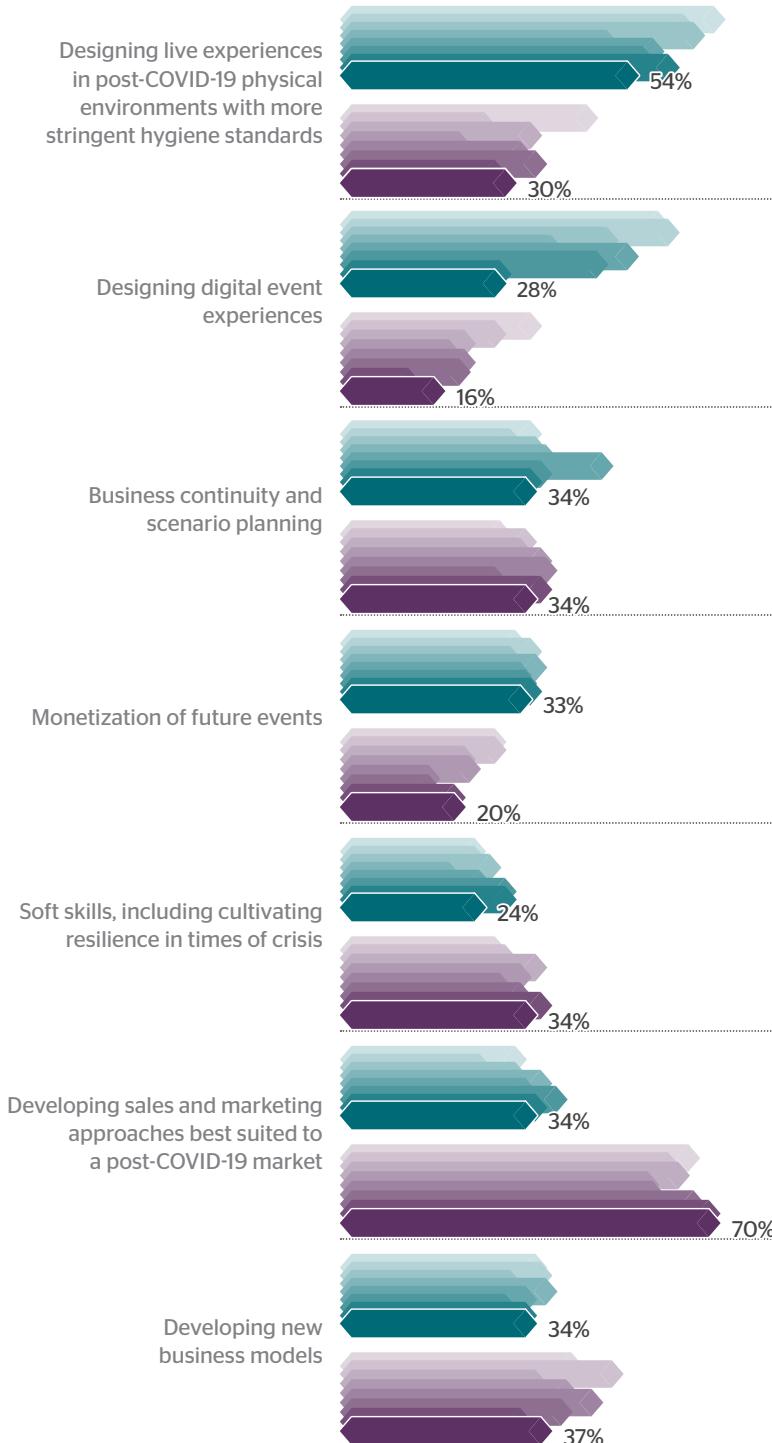
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PLANNER TRACK
SUPPLIER TRACK



In order to prepare professionally for success in the business events industry during the recovery, which new skills do you think you need to pursue/develop? (Choose all that apply.)



58%

of planners are focusing their skills on designing hybrid event experiences.

PLANNERS SPEAK

"How to deal with staff burnout and the continued uncertainty."

"Using design-focused principles to produce programs (in-person, virtual or hybrid) which provide better value to create desired, measurable behavior change in targeted stakeholders."

"Not sure new skills are needed. Just need time to use the ones we have."

SUPPLIER PERSPECTIVE

"Being more focused on individual needs."

"Creating content for hybrid event audiences."

"Diversifying our income."

"Understanding attendee perspectives."