

Global DMC Partners

Q4 2020 MEETINGS & EVENTS PULSE SURVEY



Key Insights



MOST PLANNERS EXPECT THEIR FACE-TO-FACE EVENTS TO RESUME IN Q3 OR Q4 2021.

While the industry was hopeful for face-to-face programs to resume in Q1/Q2 2021, there is a clear shift towards the latter part of 2021 with most planners (53%) now predicting that their in-person meetings and events will resume sometime in Q3 & Q4 2021.



HEALTH & WELL-BEING IS A TOP CONCERN FOR PLANNERS AROUND COVID-19

More planners are reporting that the general health and well-being of themselves and their family and friends is their #1 concern now, whereas fear/uncertainty, travel & government restrictions, and job security ranked higher in Q3.



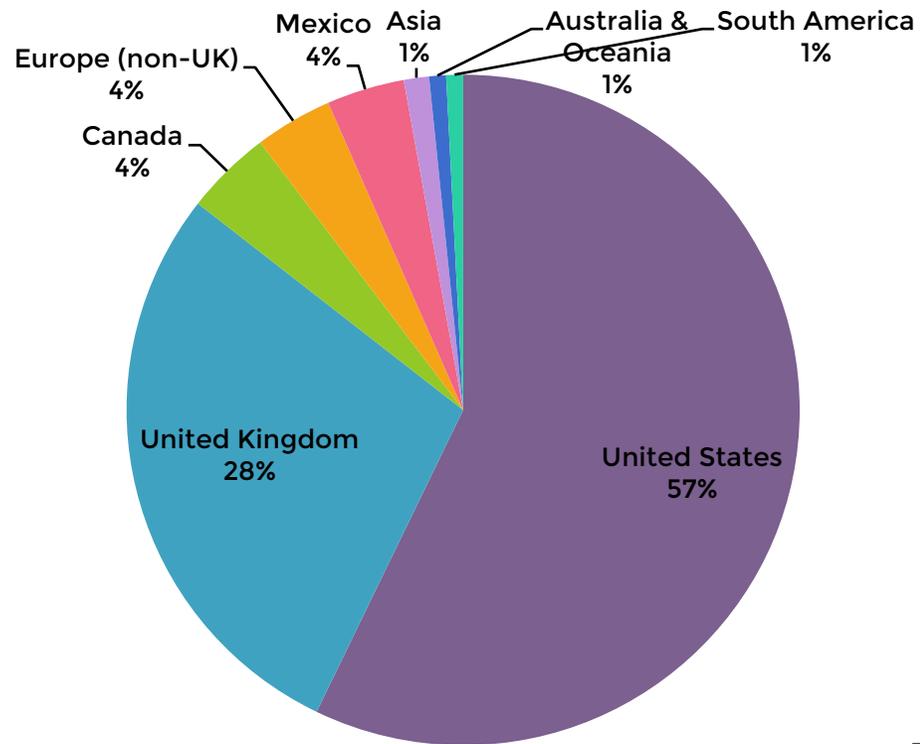
92% BELIEVE A VACCINE IS THE MOST IMPORTANT FACTOR IN BRINGING BACK FACE-TO-FACE

With the response increasing in popularity by 10 points between Q3 and Q4 2020, a widely available COVID-19 vaccine has become increasingly crucial for in-person meetings and events to resume in 2021.

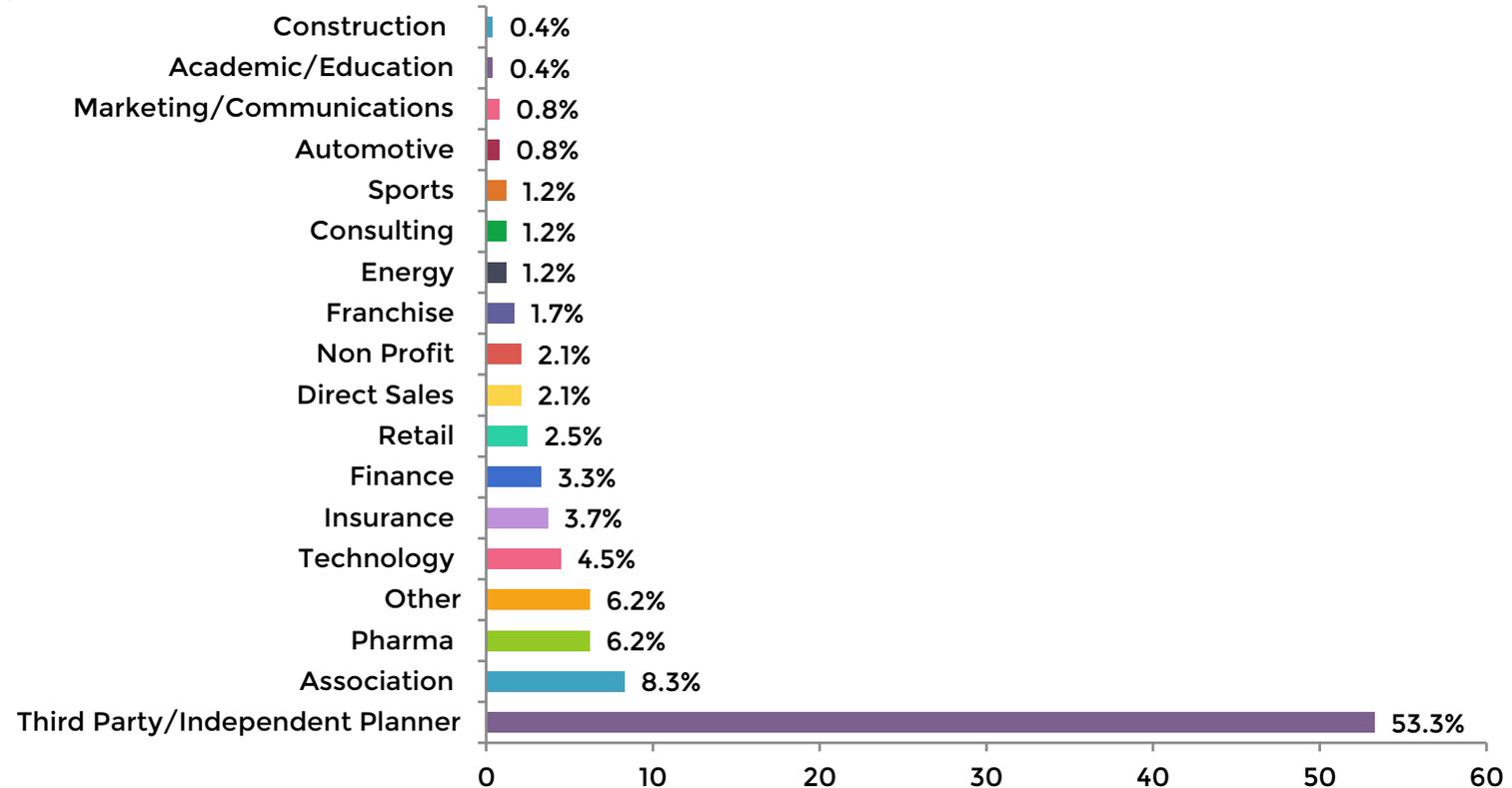
242 Respondents: 93% are Planners (vs Suppliers)

Survey conducted December 3, 2020 - December 29, 2020

Country where they are based:

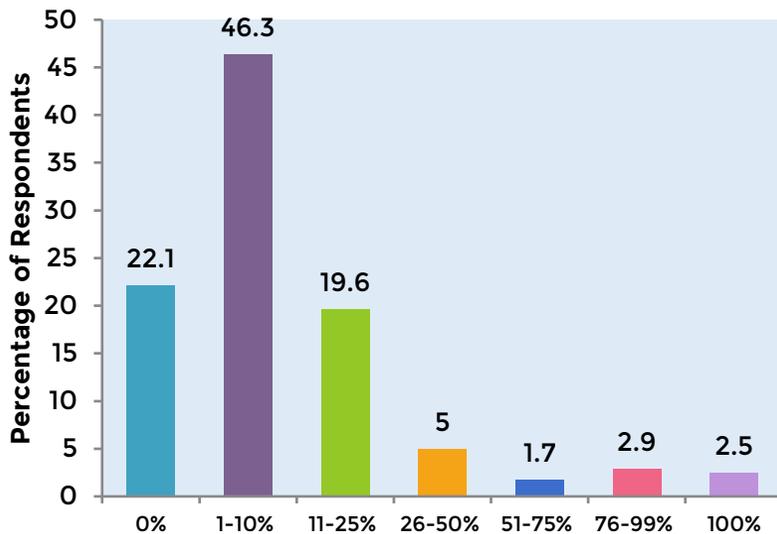


Industries Represented:



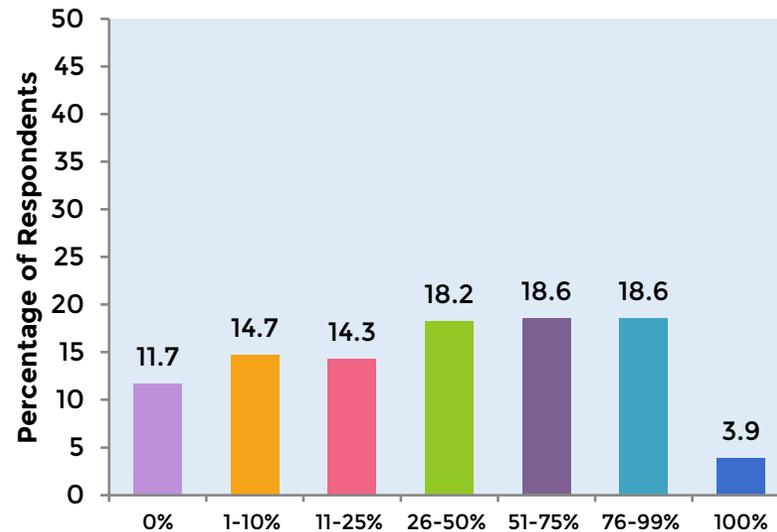
2020 Events – What operated & postponed?

88% say that **25% or less** of their in-person events operated in 2020, with many noting they took place before the pandemic in early 2020.



Percentage of 2020 in-person events operating in 2020

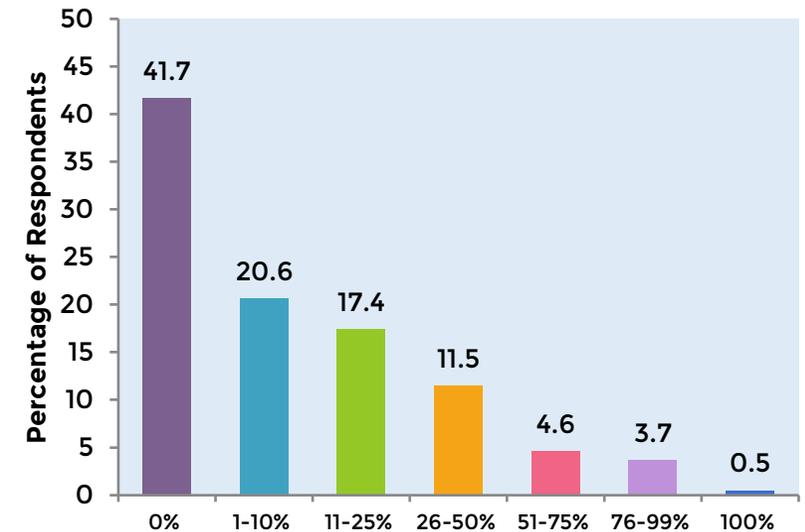
Over **88%** report that either some portion or all of their in-person 2020 events have been postponed to 2021.



Percentage of 2020 in-person events postponed to 2021

The majority of planners (**58%**) report that either some portion or that all of their 2020 in-person events were postponed to 2022.

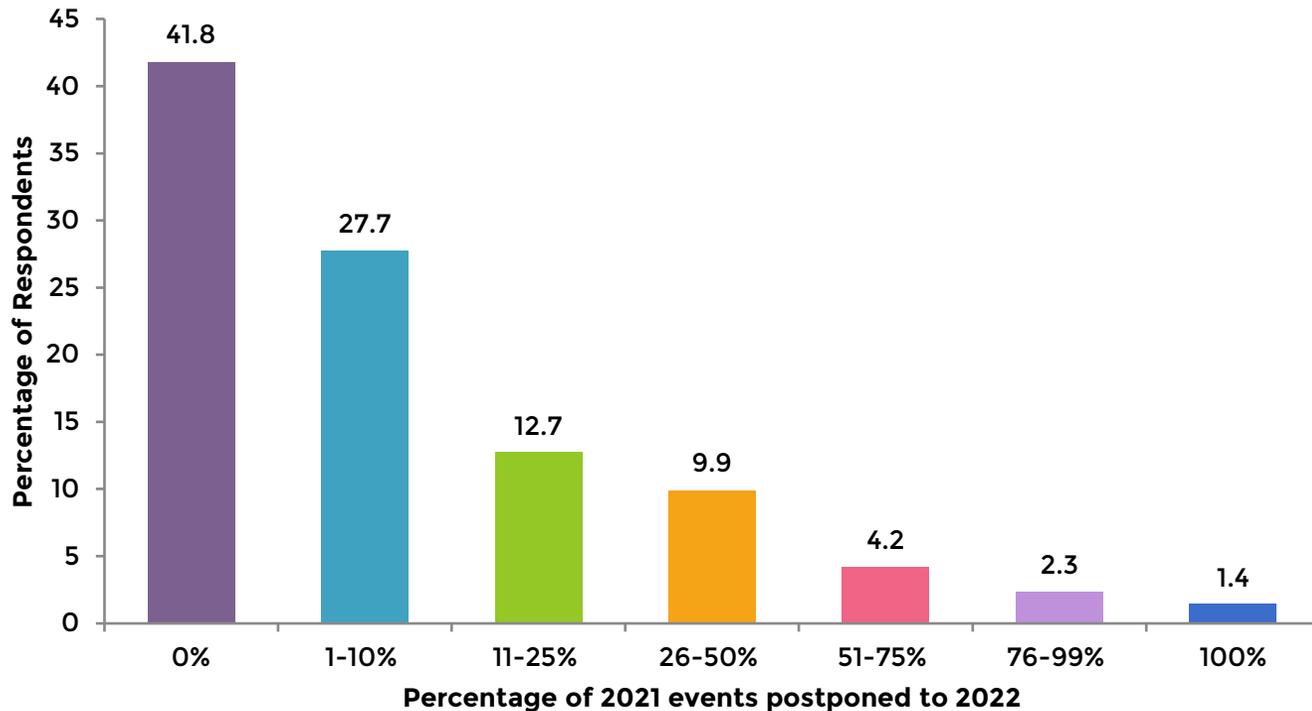
This metric has increased by over 10 points since Q3, indicating that as time has gone on, more in-person events are getting pushed to 2022.



Percentage of 2020 in-person events postponed to 2022

2021 Events – How many are already postponed?

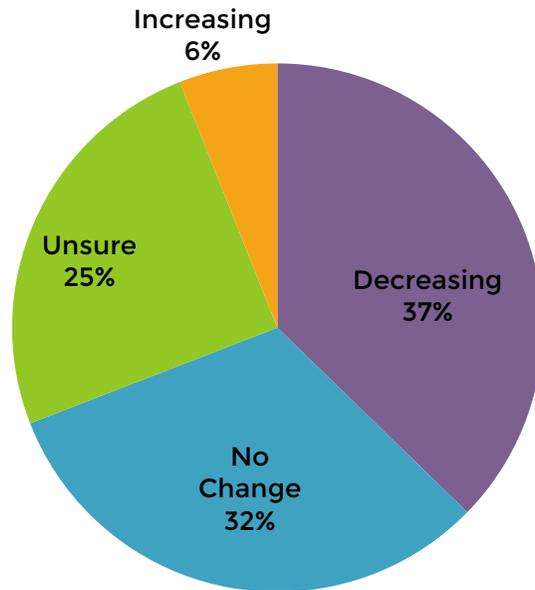
What percentage of your 2021 in-person meetings, incentives or events have already been postponed to 2022?



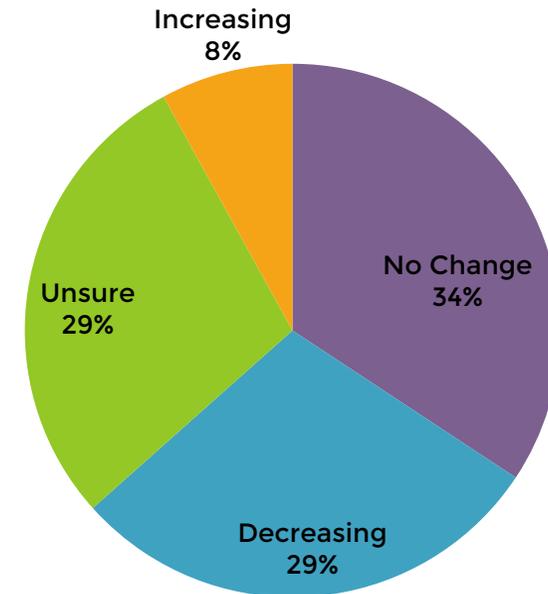
50% report that up to half of their 2021 in-person events have already been postponed to 2022.

2021 Budgets

Are your budgets for meetings, conferences, and events increasing, decreasing, or staying the same from 2020 to 2021?



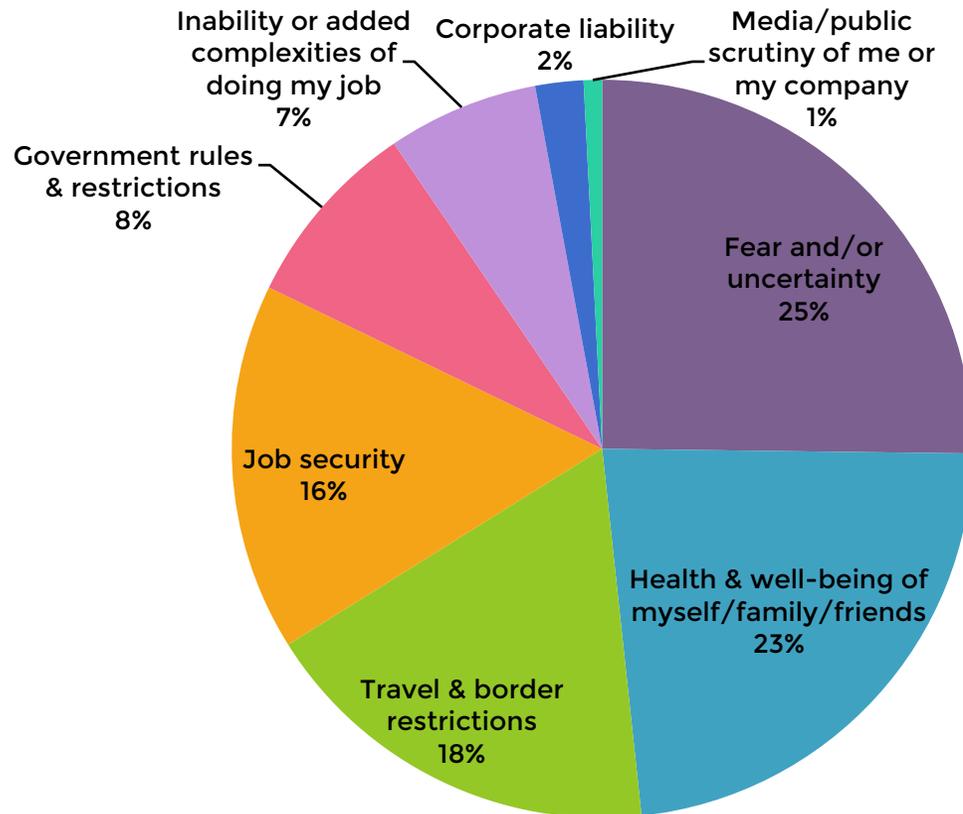
Are your budgets for incentives increasing, decreasing, or staying the same from 2020 to 2021?



For the majority, budgets are either decreasing or staying the same in 2021.

Industry Concerns Surrounding COVID-19

What part of the COVID-19 crisis is your biggest concern?

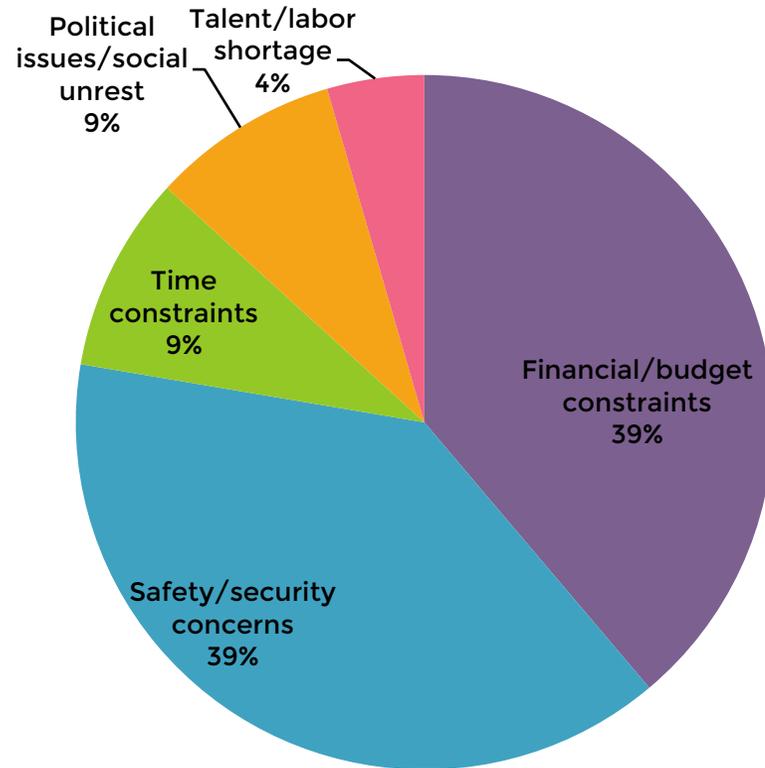


As compared to Q3 responses, **general fear and uncertainty** decreased by 8 points while **health and well-being of myself/family/friends** increased by 7 points in Q4 responses.

One potential correlation is that as COVID-19 cases rose in late 2020, health and well-being also became of greater concern to more people by the end of 2020.

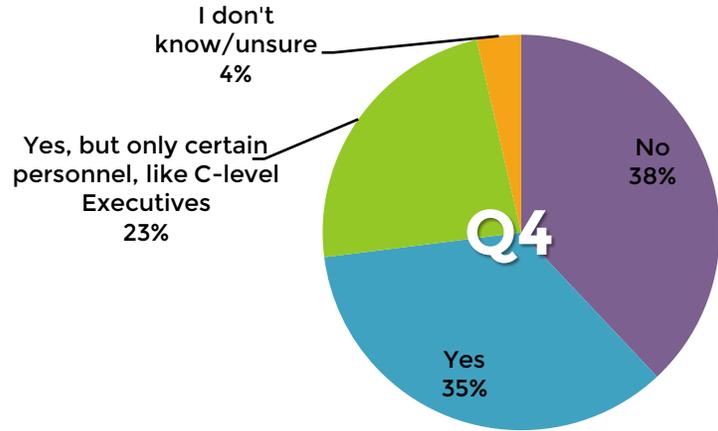
Second Largest Industry Concern (after COVID-19)

Other than COVID-19, what is the second largest issue or challenge that you currently face within the industry?

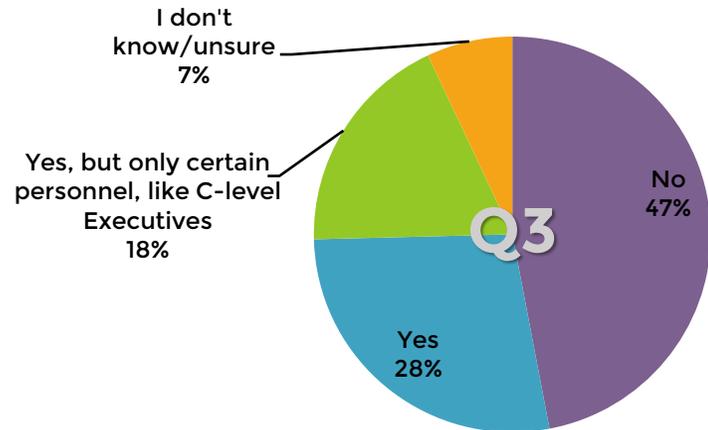


Financial and budget constraints along with safety/security concerns are the next largest concerns after COVID-19.

Are companies allowing employees to travel?

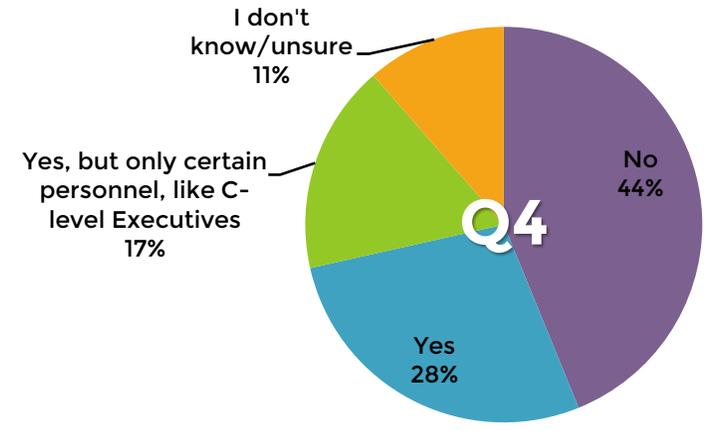


USA

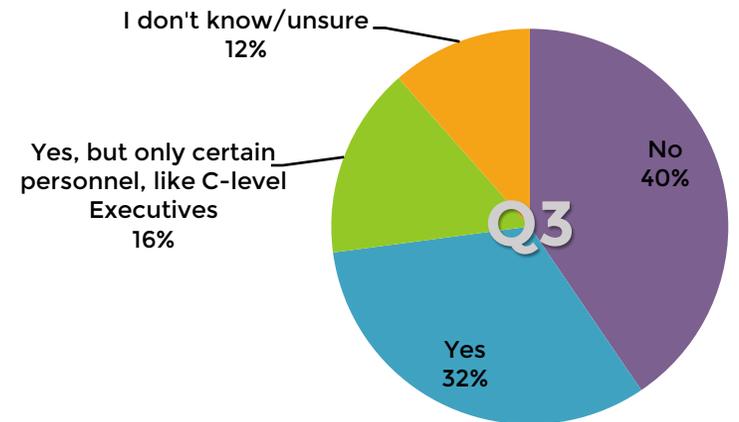


More US companies are allowing their employees to travel than non-US companies and this has increased as compared to Q3 responses.

Non-USA companies became slightly more conservative around allowing their employees to travel.



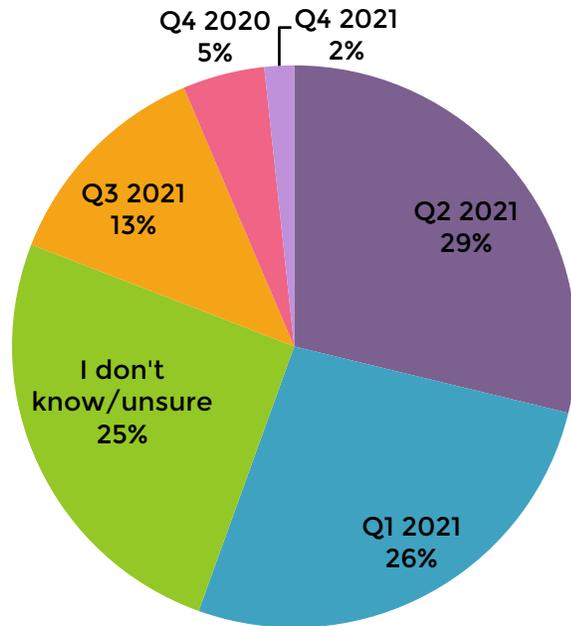
Non-USA



When will employees travel again?

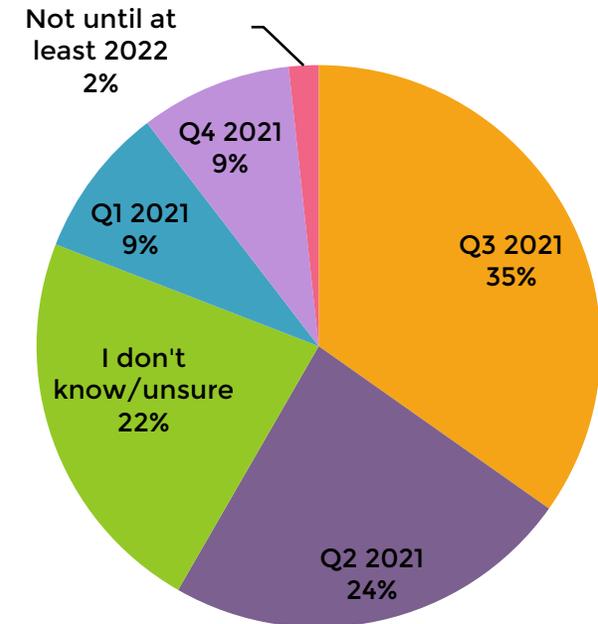
When do you predict your company will allow employees to travel again?

Q3 RESPONSES



The timeline for travel continues to pushback with most planners reporting that they predict their companies will allow travel starting in Q2 or Q3 2021.

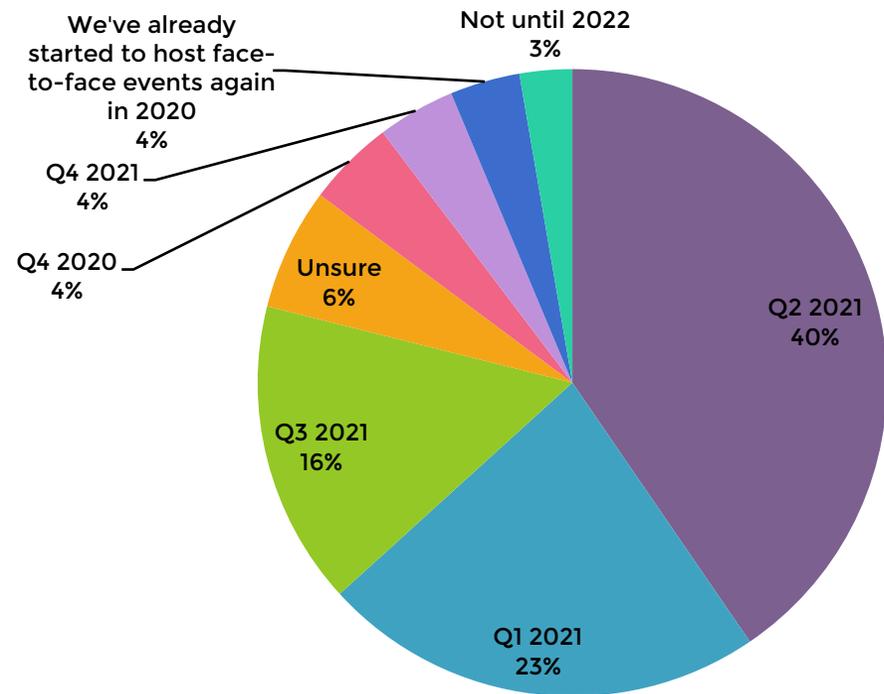
Q4 RESPONSES



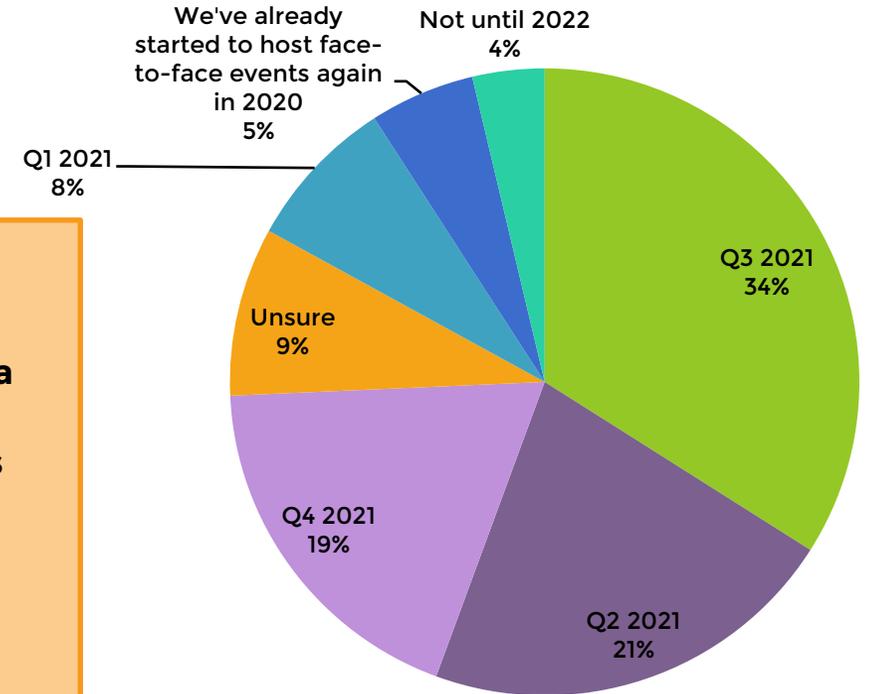
When will face-to-face events return?

When do you predict that your company (or clients) will start to host face-to-face live events, meetings, or incentives again?*

Q3 RESPONSES



Q4 RESPONSES

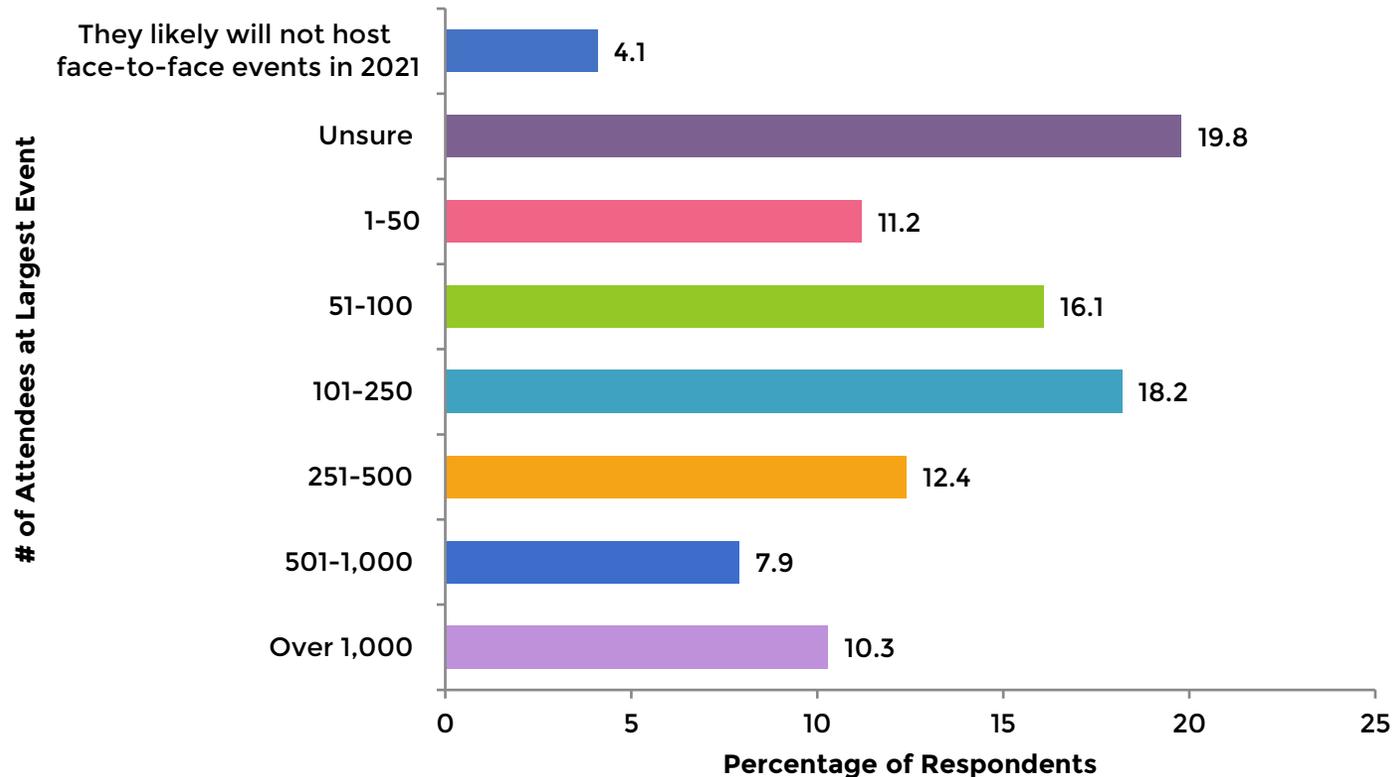


While the industry was hopeful for face-to-face programs to resume in Q1/Q2 2021, there is a clear shift towards the latter part of 2021 with most planners (53%) now predicting that their in-person meetings and events will resume sometime in Q3 & Q4 2021.

*If markets are open, flights are available, and health protocols are followed

Size of face-to-face events in 2021

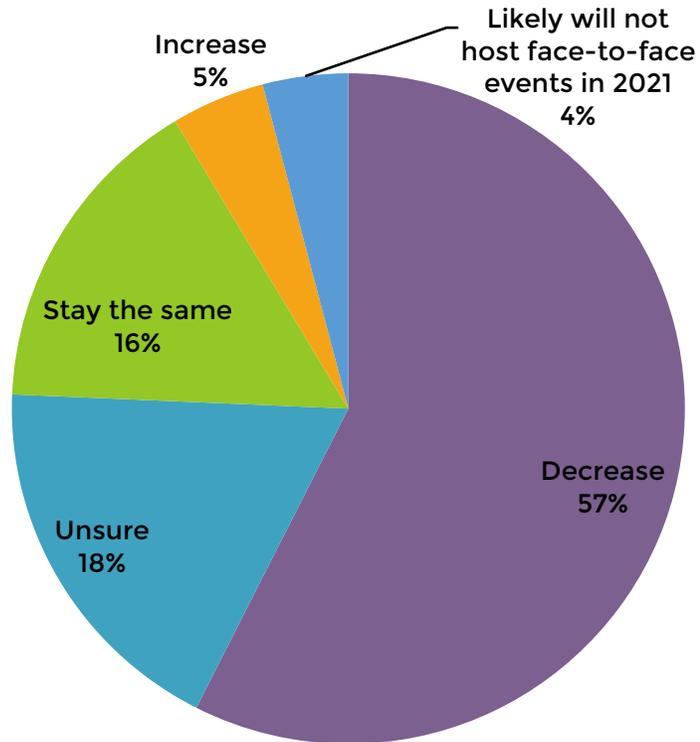
If your clients/company host face-to-face events in 2021, about how many attendees will you aim for at your largest program?



While many are still unsure about their attendee numbers, **46%** are reporting that they would expect less than 250 attendees at their largest in-person event in 2021.

Size of face-to-face events in 2021

Do you anticipate your average attendee numbers to decrease, increase or remain the same?

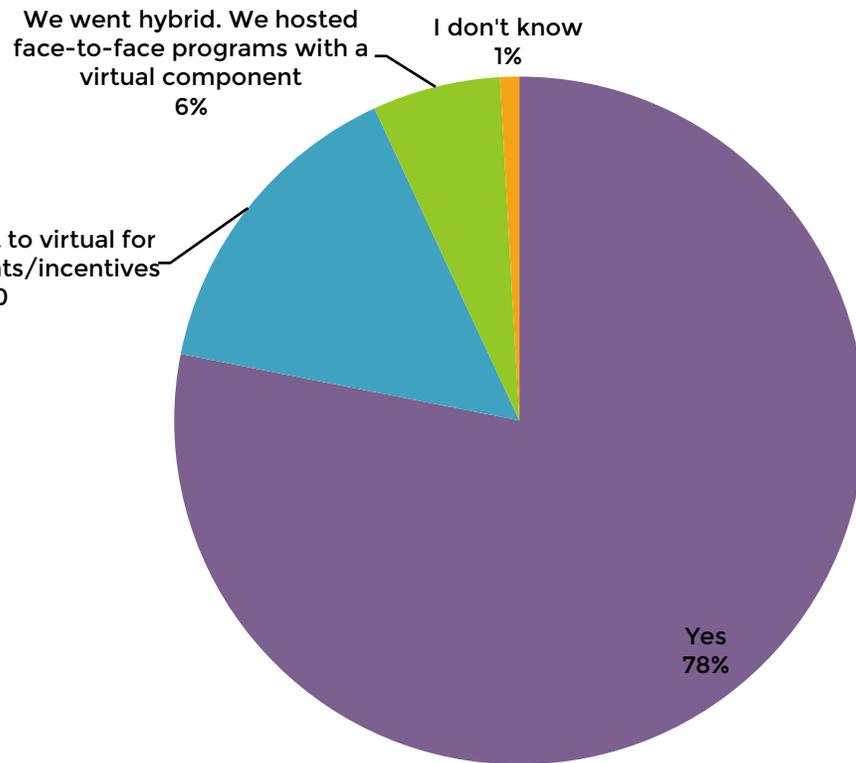


The majority (57%) are predicting average 2021 attendee numbers to decrease.

Many respondents commented that attendees may not feel comfortable traveling or attending an event, along with the potential that programs will incorporate a hybrid/virtual component.

Virtual in 2020?

In lieu of live meetings, events, and/or incentives in 2020, did your company (or clients) host virtual meetings, events and/or incentives in place of the live event?



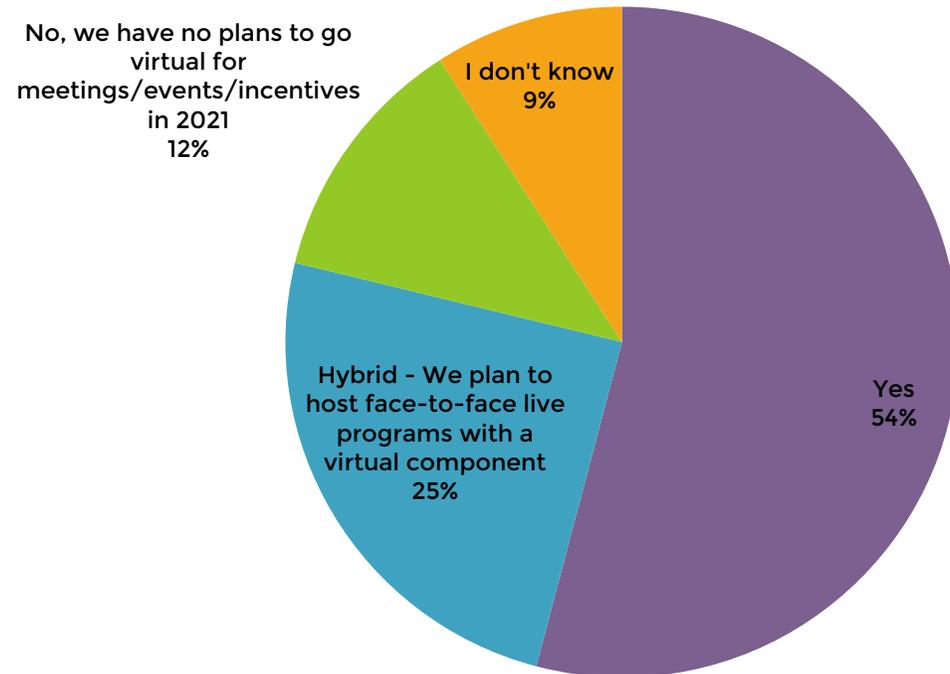
The vast majority (78%) of planners pivoted to virtual events in 2020.

The pivot to virtual in 2020 increased as the year progressed.

In Q2 2020, only 52% reported they were pivoting to virtual events. In Q3, 72% reported they were pivoting to virtual events.

Virtual in 2021?

In lieu of live meetings, events, and/or incentives in 2021, is your company (or clients) hosting virtual meetings, events and/or incentives in place of the live event?



The majority (54%) are moving their in-person events to virtual in 2021.

Once more, the pivot to virtual not only increased throughout 2020, but is becoming more of a long-term solution as the pandemic wears on.

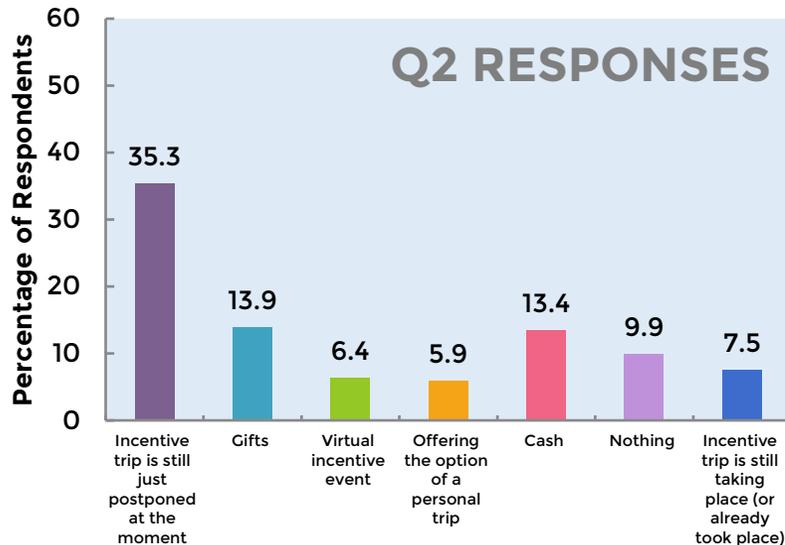
In Q2 2020, only 13% reported they were taking their programs virtual in 2021. In Q3, 30% reported they were taking their programs virtual in 2021.

2020 Incentives

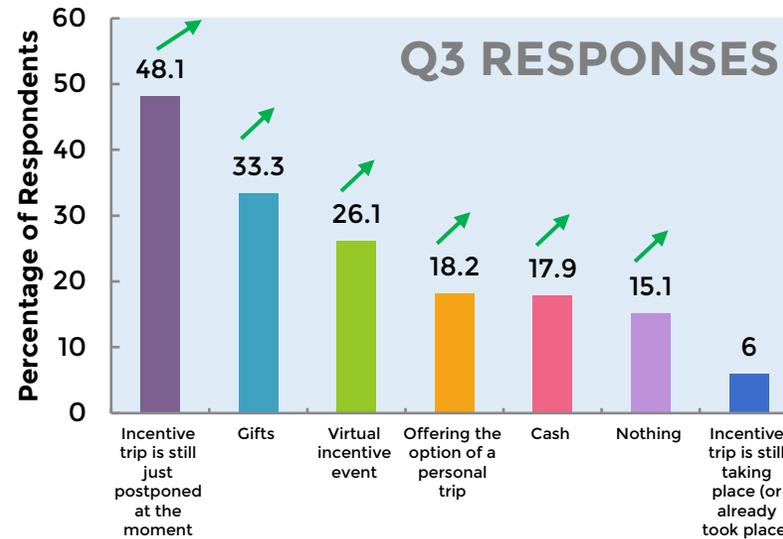
For 2020 incentive programs, what are you (or your clients) offering participants in lieu of a live incentive trip?

Incentive trips are largely irreplaceable.

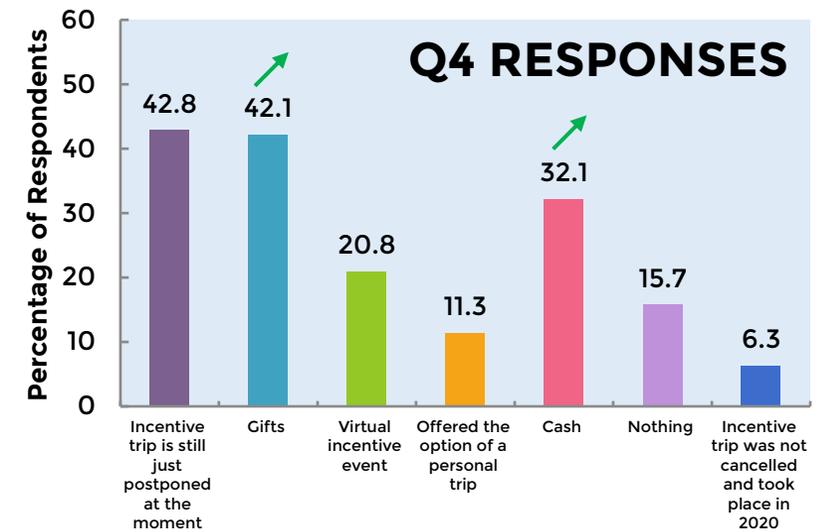
While many incentive trips are still just postponed, as 2020 went on Gifts and Cash became increasingly popular as replacements for the incentive trip.



Replacement Options For Incentive Trips



Replacement Options For Incentive Trips



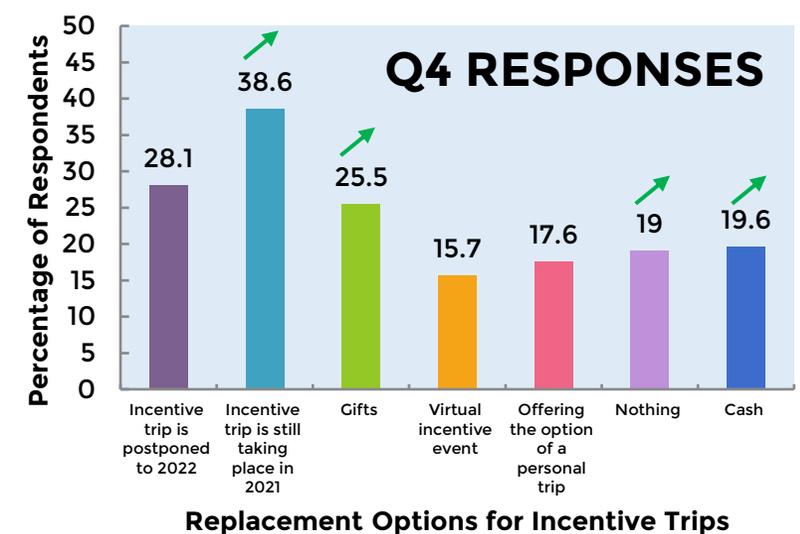
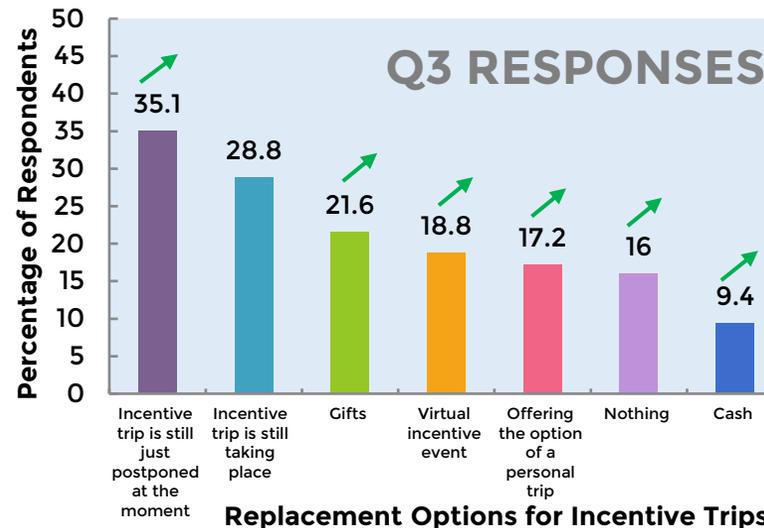
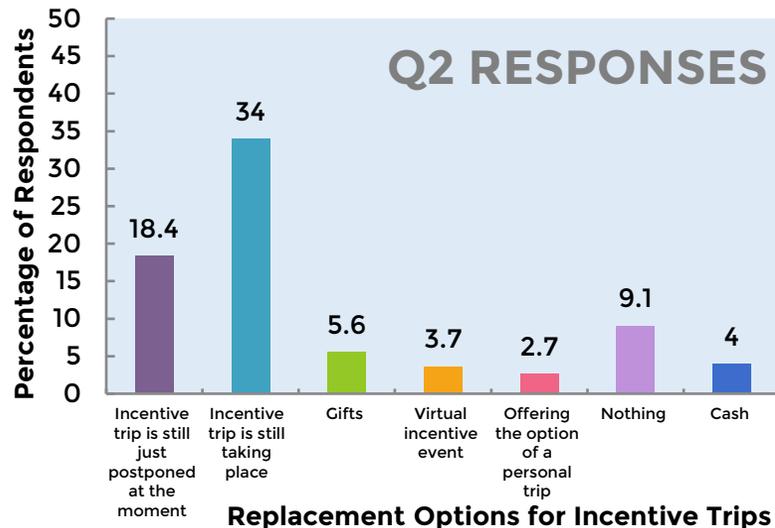
Replacement Options For Incentive Trips

2021 Incentives

For 2021 incentive programs, what are you (or your clients) offering participants in lieu of a live incentive trip?

67% report that the incentive trip is still taking place in 2021 or 2022.

Or, offering Cash or Gifts is another popular option.



The Future of Face-to-Face

Which of the following do you predict your company will implement for your future face-to-face programs?

Q2 RESPONSES

ANSWER	PERCENT
Hand sanitizer stations	90%
Space restrictions in meeting rooms to maintain distance between participants	79%
Plated, served or boxed meals only	67%
Reduced attendee count	61%
Only contracting hotels, venues, and event vendors with verifiable sanitation processes	60%
Virtual option for all face-to-face meetings/events	52%
Mandatory face masks for attendees	41%
Limited number of participants for tours/activities	35%
Temperature check at registration	35%
Medical/EMT personnel on staff	28%
No international travel/meetings (will stay domestic/local only)	23%
Considering ground transportation changes	11%
Private chartered flights	5%

Q3 RESPONSES

ANSWER	PERCENT
Hand sanitizer stations	93%
Space restrictions in meeting rooms to maintain distance between participants	88%
Plated, served or boxed meals only	79%
Mandatory face masks for attendees	72% (+31)
Temperature check at registration	68% (+33)
Only contracting hotels, venues, and event vendors with verifiable sanitation processes	65%
Reduced attendee count	64%
Virtual option for all face-to-face meetings/events	61%
Limited number of participants for tours/activities	44%
Considering ground transportation changes	37% (+26)
Medical/EMT personnel on staff	32%
No international travel/meetings (will stay domestic/local only)	22%
Private chartered flights	5%

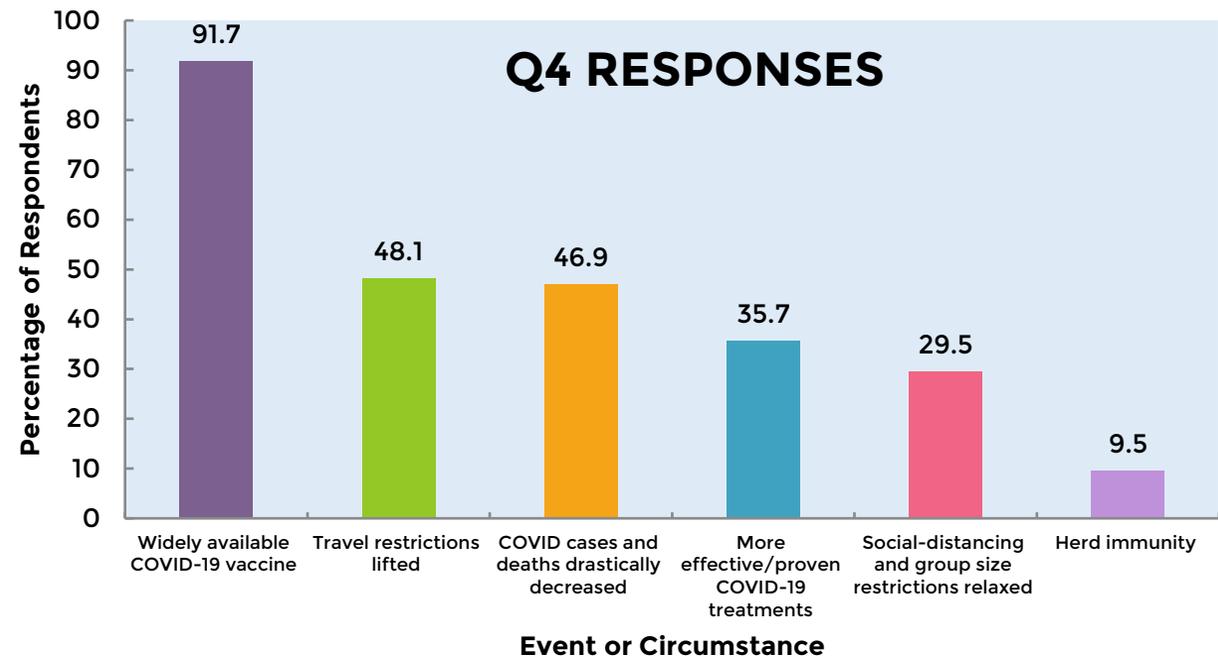
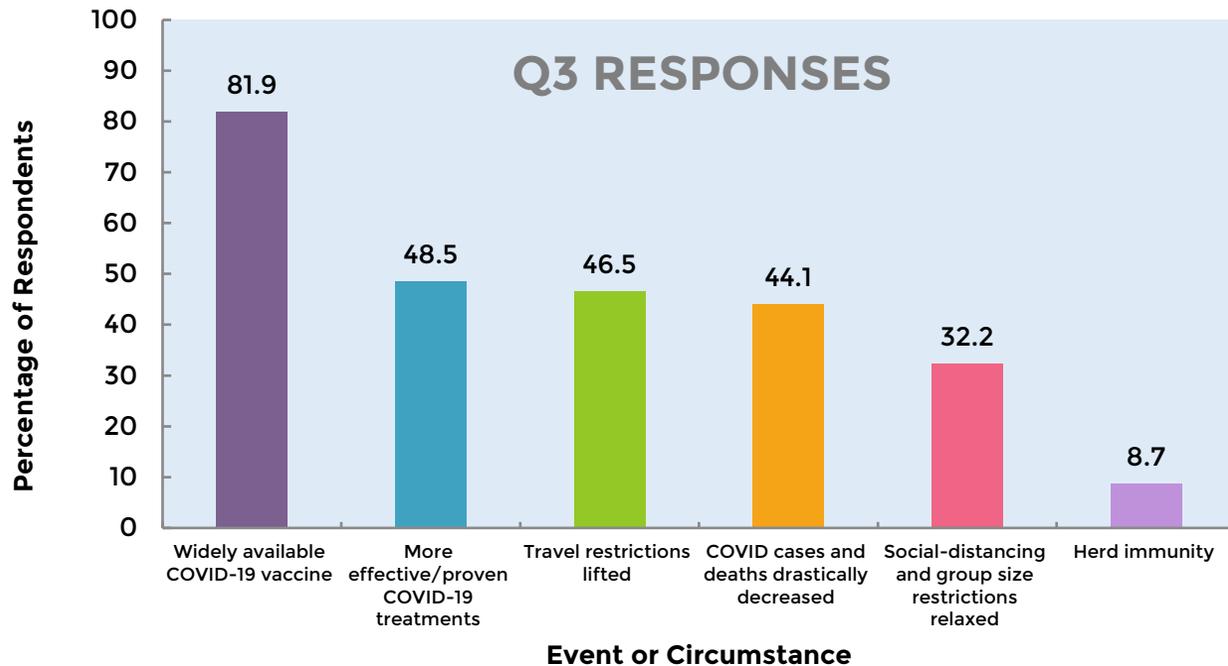
Q4 RESPONSES

ANSWER	PERCENT
Hand sanitizer stations	87%
Space restrictions in meeting rooms to maintain distance between participants	86%
Mandatory face masks for attendees	↑ 69%
Temperature check at registration	↑ 65%
Plated, served or boxed meals only	63%
Reduced attendee count	↑ 60%
Virtual option for all face-to-face meetings/events	↑ 59%
Only contracting hotels, venues, and event vendors with verifiable sanitation processes	57%
Limited number of participants for tours/activities	38%
Considering ground transportation changes	36%
Medical/EMT personnel on staff	34%
No international travel/meetings (will stay domestic/local only)	16%
Private chartered flights	3%

What will bring back face-to-face?

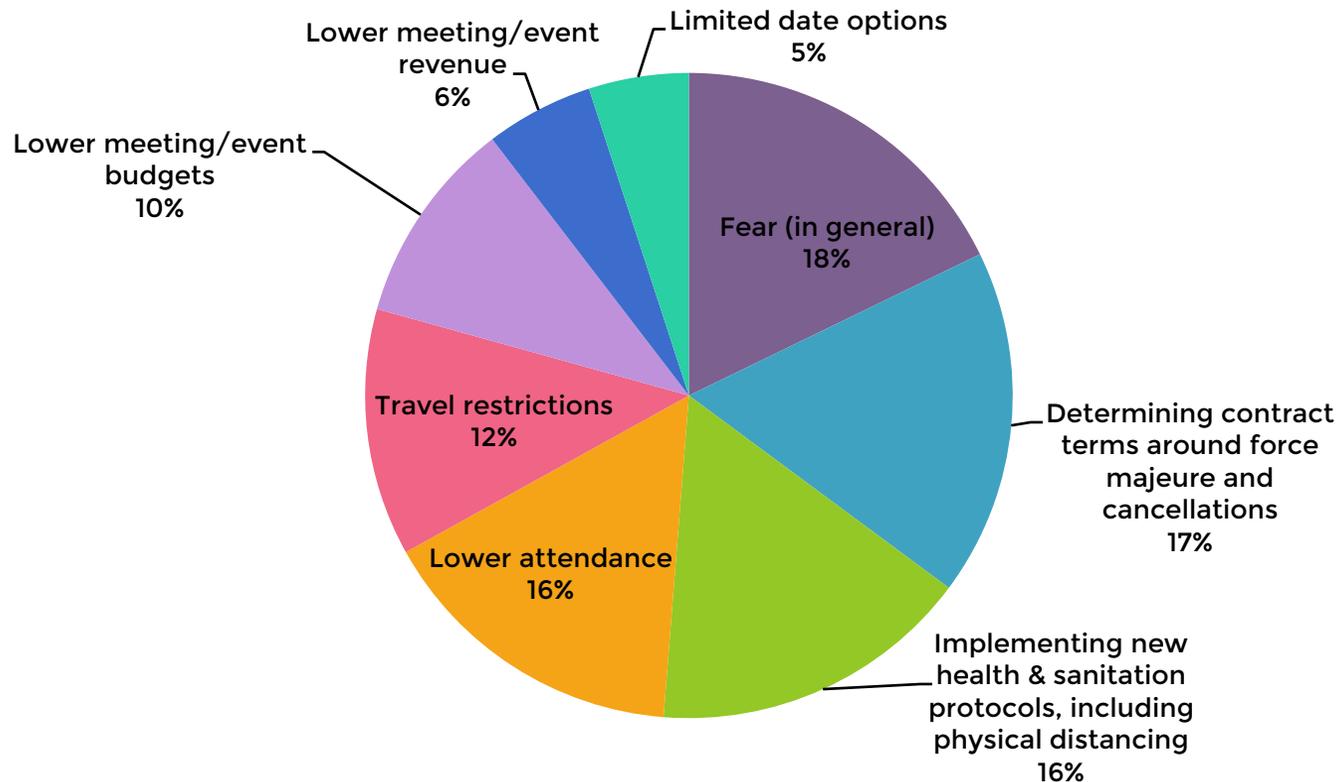
What do you anticipate will be the event or circumstance that will make your organization and/or clients more comfortable with hosting live meetings/events? *(Respondents could select up to three)*

92% believe a vaccine is the most important factor in bringing back face-to-face events. This increased by 10 points between Q3 and Q4.



Post COVID-19 Challenges

What is the #1 challenge you expect to face with your meetings, events, and incentives once travel resumes more broadly?



Fear, determining contract terms, implementing new health & sanitation protocols, and lower attendance are the top expected challenges for planners in 2021.

Lower meeting/event budgets dropped by 7 points since Q3.

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