



Global DMC Partners

MAY 2020 MEETINGS & EVENTS PULSE SURVEY

Key Insights



THE IMPACT OF THE COVID-19 PANDEMIC TO 2020 MEETINGS & EVENTS IS DRASTIC.

97.3% reported that their 2020 meetings and events were impacted by the crisis.



INCENTIVE PROGRAMS AND FACE-TO-FACE EVENTS ARE NOT FULLY REPLACEABLE.

While many live events are pivoting to virtual in 2020, virtual is not considered to be a long-term replacement for face-to-face events. Live events and hybrid solutions are in high demand for 2021.



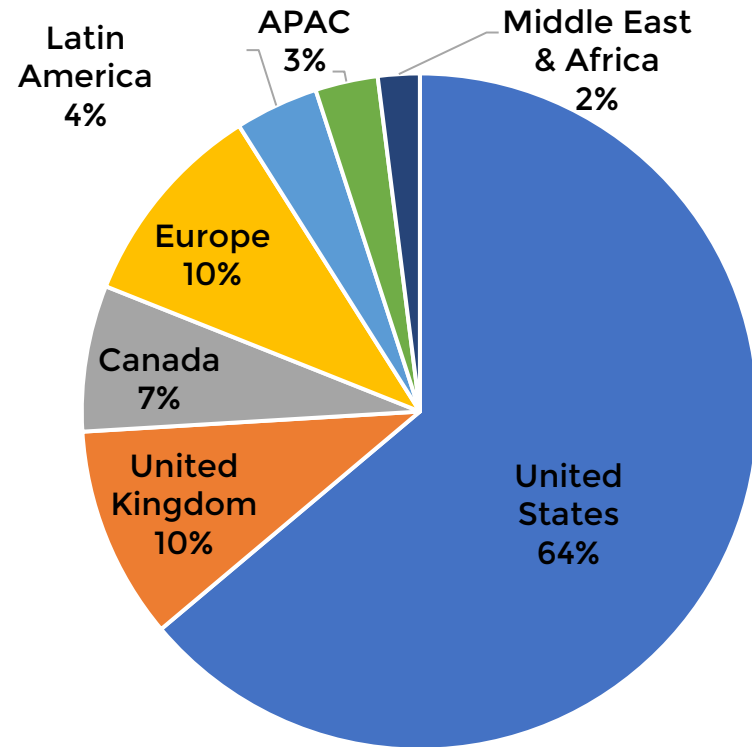
GENERAL FEAR OF COVID-19 AND TRAVEL RESTRICTIONS ARE TOP OF MIND.

A clear outline of health and sanitation protocols throughout the entire event supplier chain is vital to restoring confidence for the future rebirth of face-to-face meetings and events.

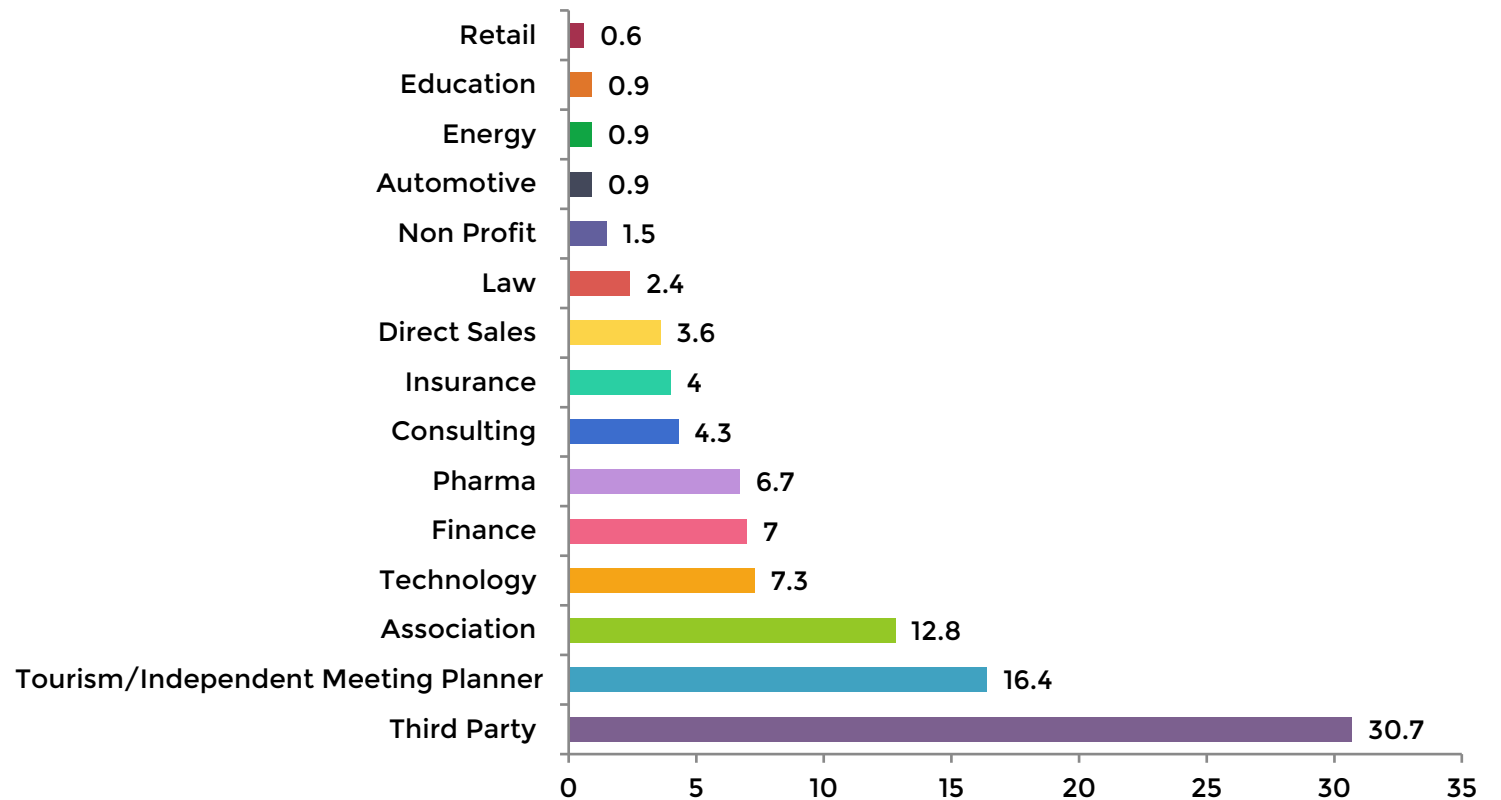
374 Respondents: 93% are Planners (vs Suppliers)

Survey conducted April 27, 2020 - May 4, 2020

Country where they are based:



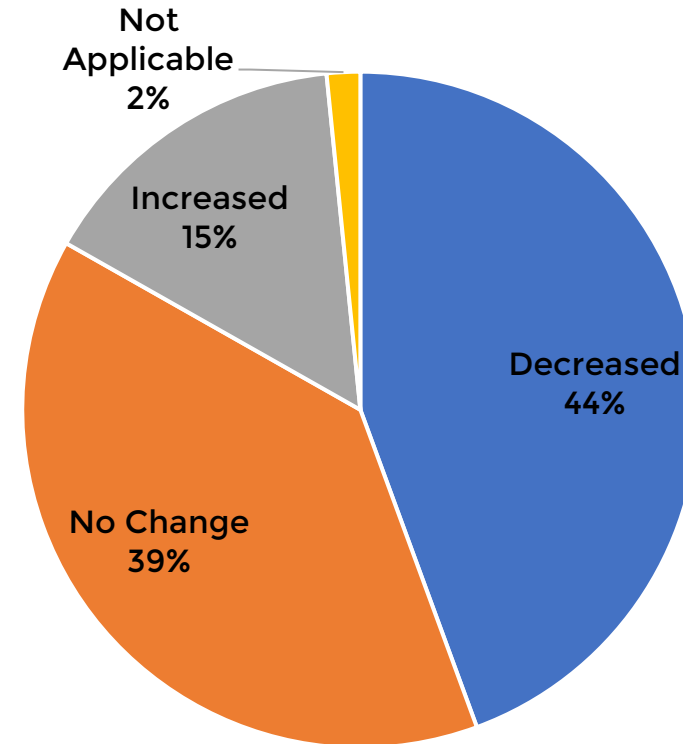
Industries Represented:



2020 Budgets

Have budgets for meetings, conferences, and events increased, decreased, or stayed the same from 2019 to 2020?

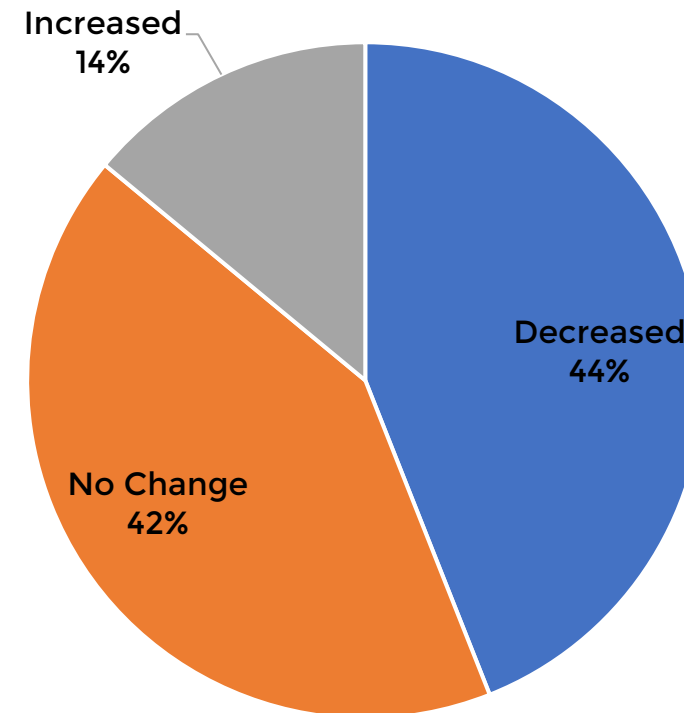
Compared to GDP's Q1 survey, **20% more planners** are now reporting a decrease in meeting budgets, likely due to COVID-19.



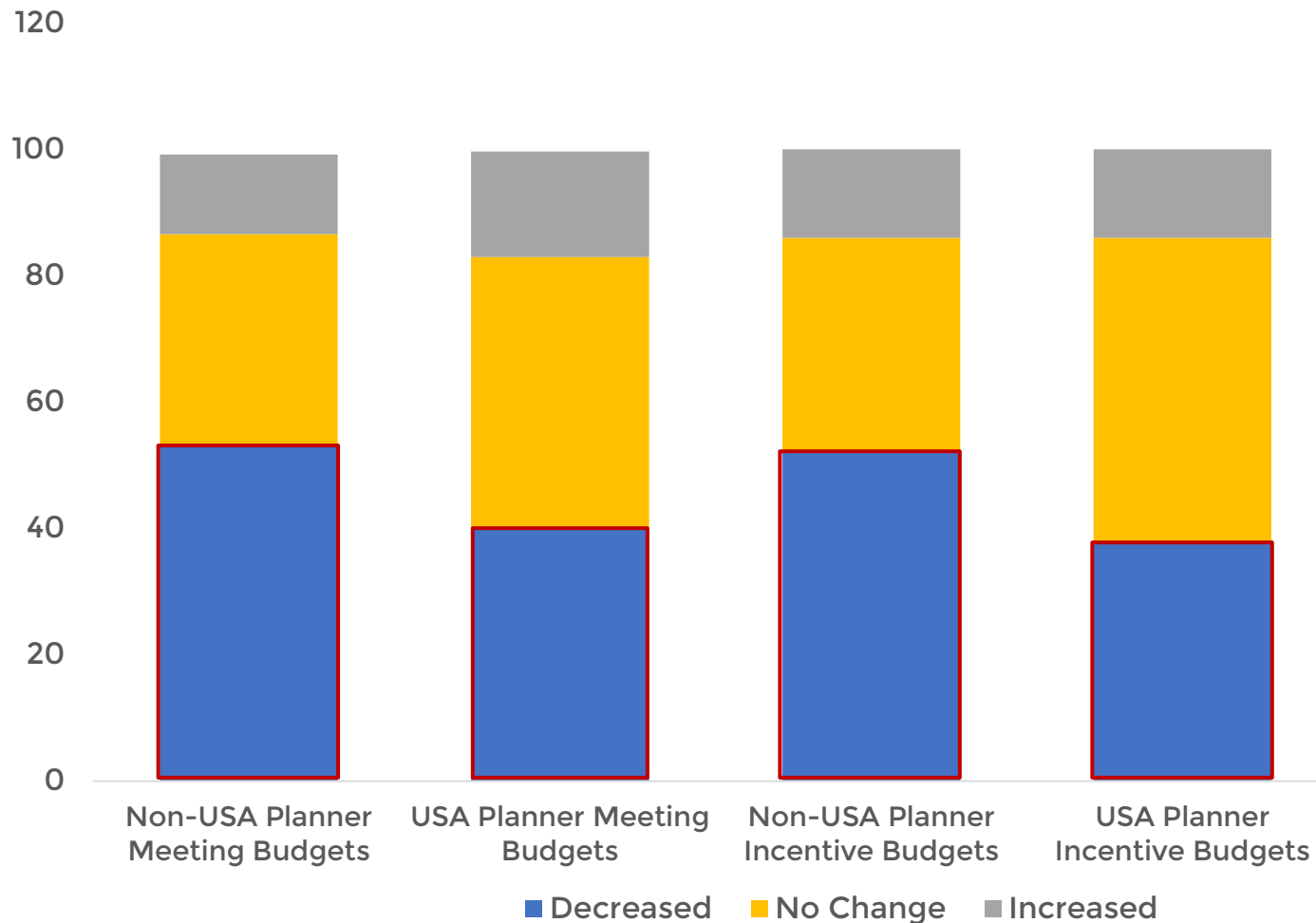
2020 Budgets

Have budgets for incentives increased, decreased, or stayed the same from 2019 to 2020?

Compared to GDP's Q1 survey, **17% more planners** are now reporting a decrease in meeting budgets, likely due to COVID-19.



2020 Budgets: USA vs Non-USA

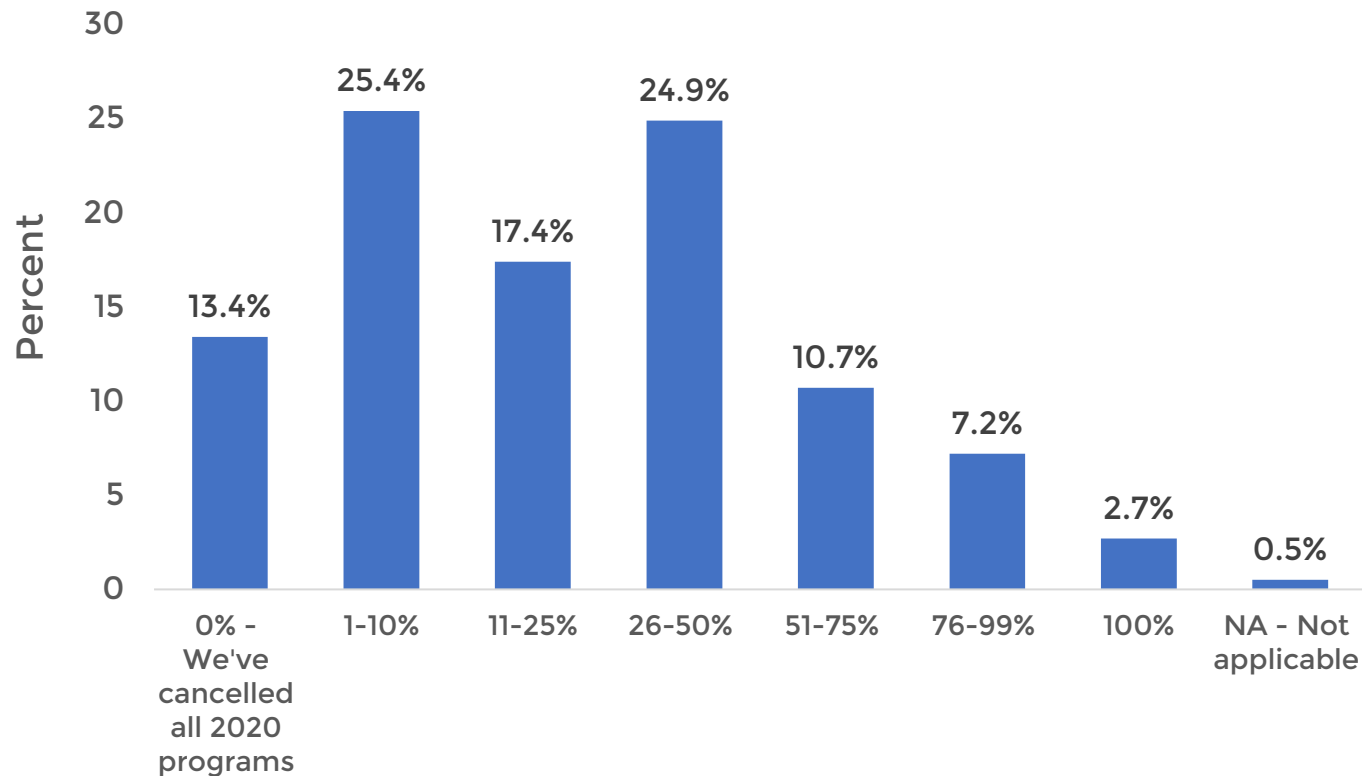


More non-USA planners are seeing a decrease in budgets than USA planners.

- **53% non-USA respondents** said their 2020 meeting budgets decreased from 2019, compared to only **40% of USA respondents**.
- **52% non-USA respondents** said their 2020 incentive budgets decreased from 2019 compared to only **38% of USA respondents**.

2020 Events – Are any operating?

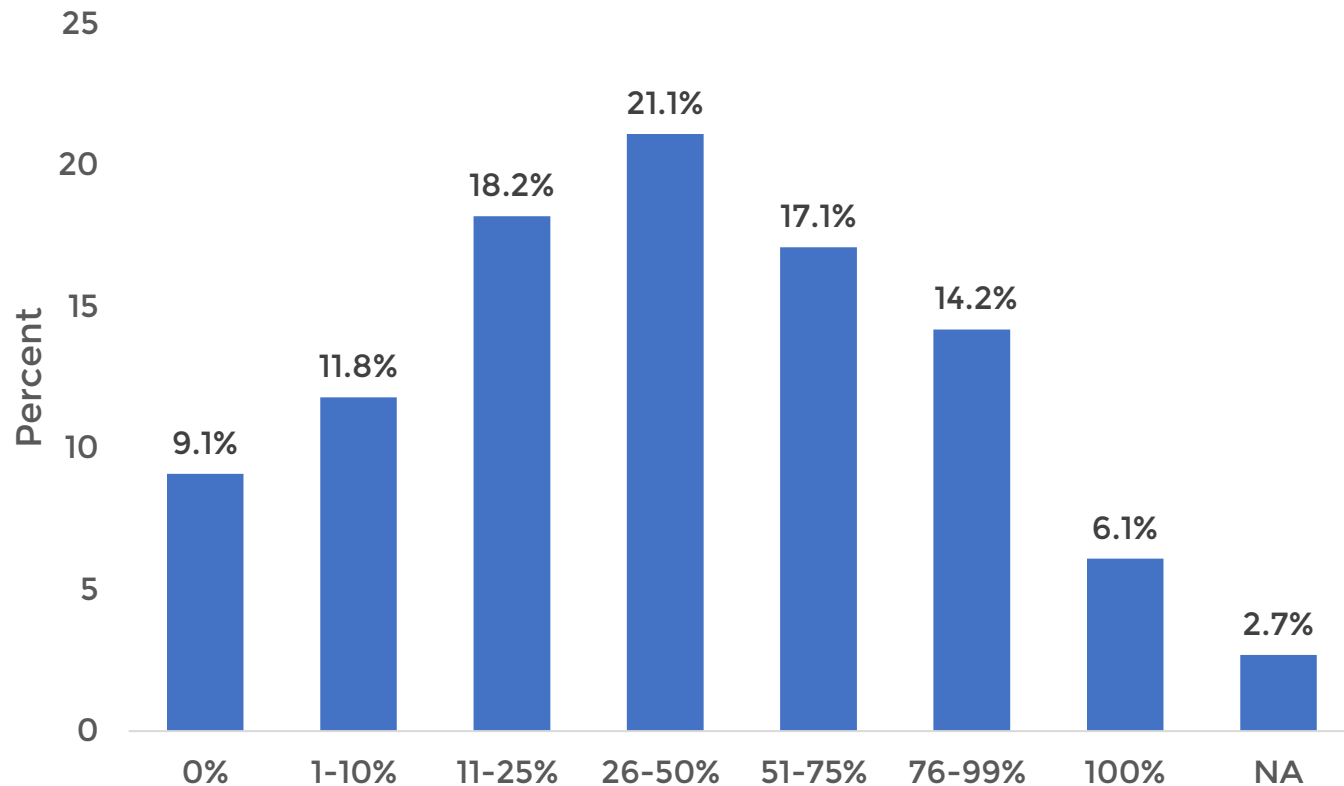
What percentage of your 2020 live meetings, incentives or events operated or plan to operate in 2020?



56.2% predict they will operate 25% or less of their 2020 live events.

2020 Events – How many are postponing?

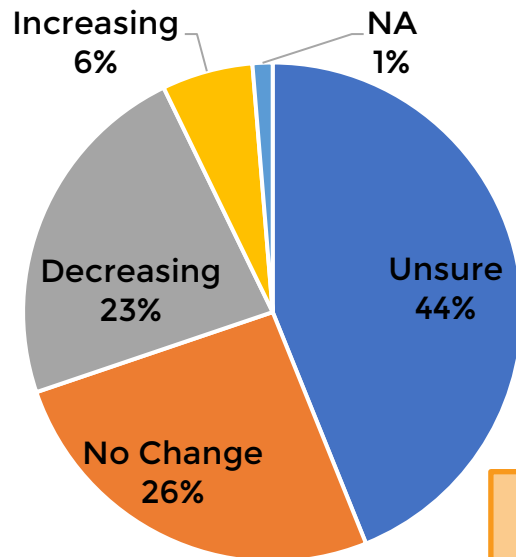
What percentage of your 2020 live meetings, incentives or events have been postponed to 2021?



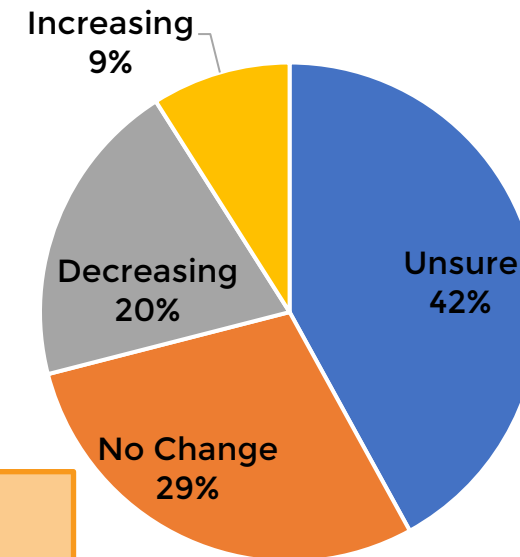
88.2% predict that some portion of their 2020 events will be or are already postponed to 2021.

2021 Budgets

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



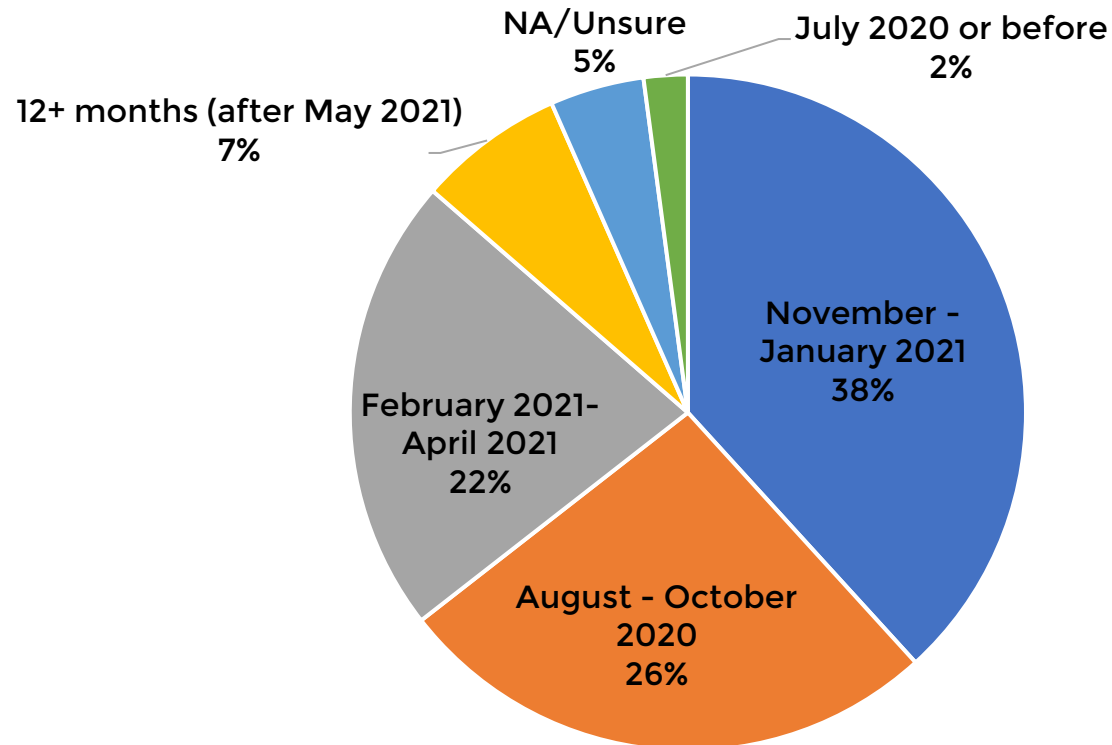
Are your budgets for incentives increasing, decreasing, or staying the same from 2020 to 2021?



The majority are still unsure about 2021 budgets.

When will live events return?

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

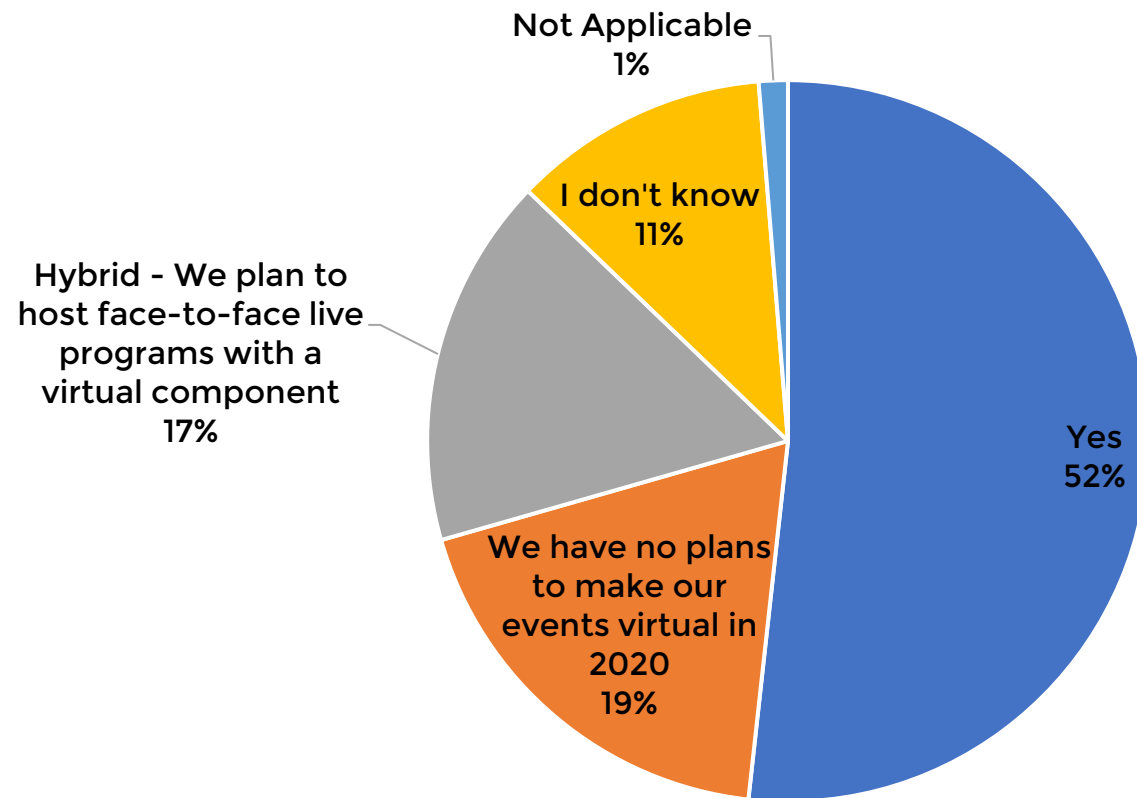


As of May 4, 2020

The majority (64%) are predicting that they will host live events sometime between August 2020 - January 2021.

Virtual in 2020?

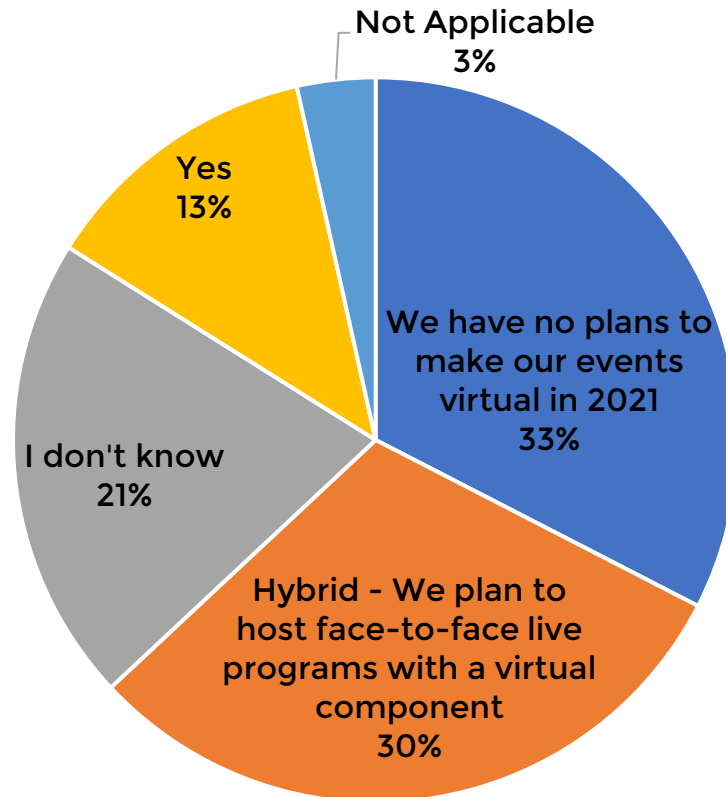
In lieu of live meetings, events, and/or incentives in 2020, is your company (or clients) hosting virtual meetings, events and/or incentives in place of the live event?



69% plan to go virtual or incorporate virtual aspects into their program in 2020.

Virtual in 2021?

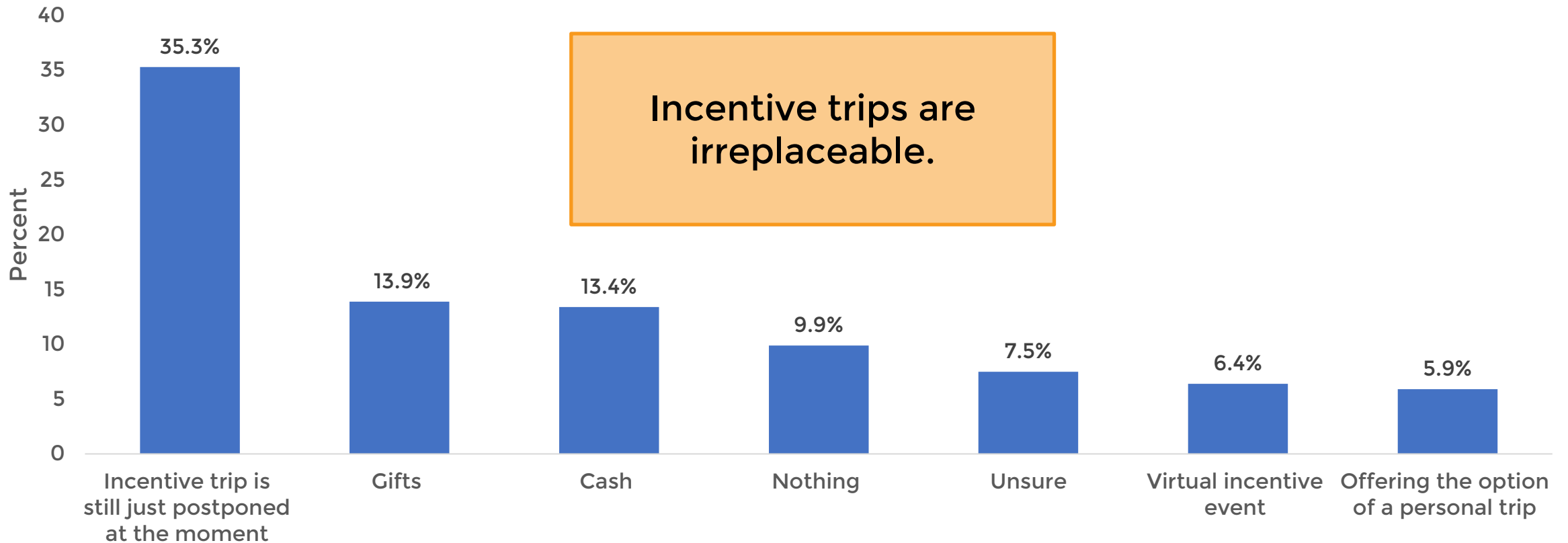
In lieu of live meetings, events, and/or incentives in 2021, is your company (or clients) hosting virtual meetings, events and/or incentives in place of the live event?



The majority (63%)
have no plans to go
completely virtual in 2021.

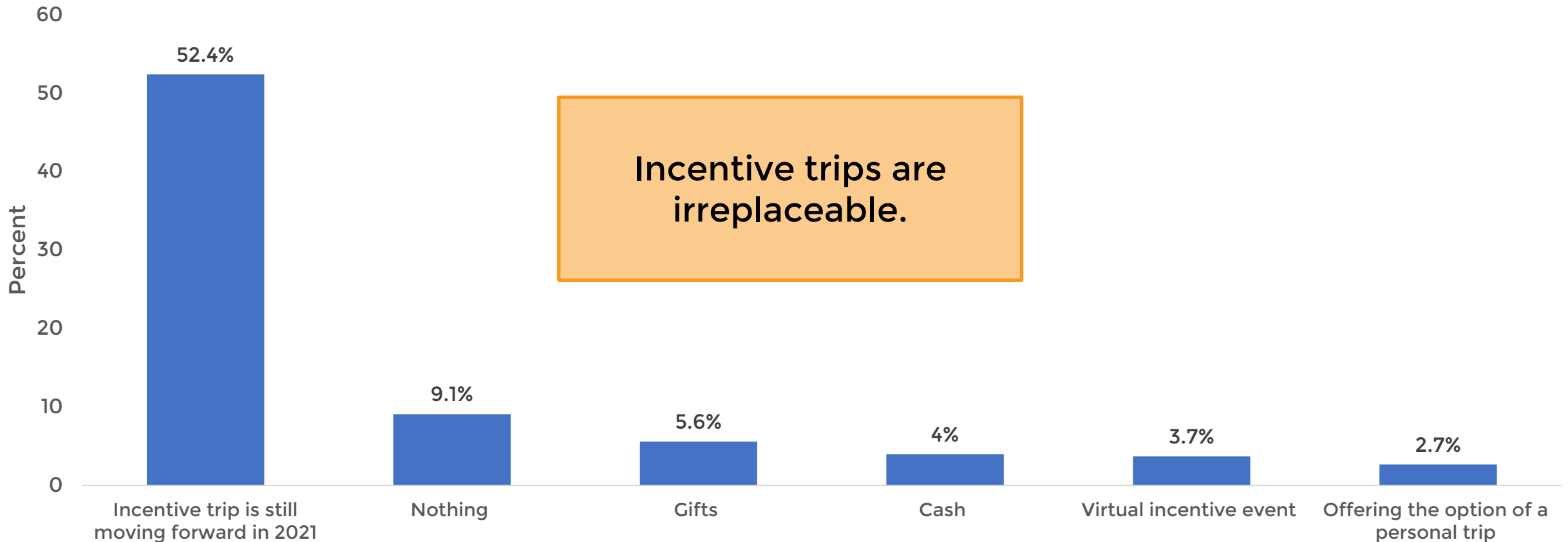
2020 Incentives

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



2021 Incentives

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



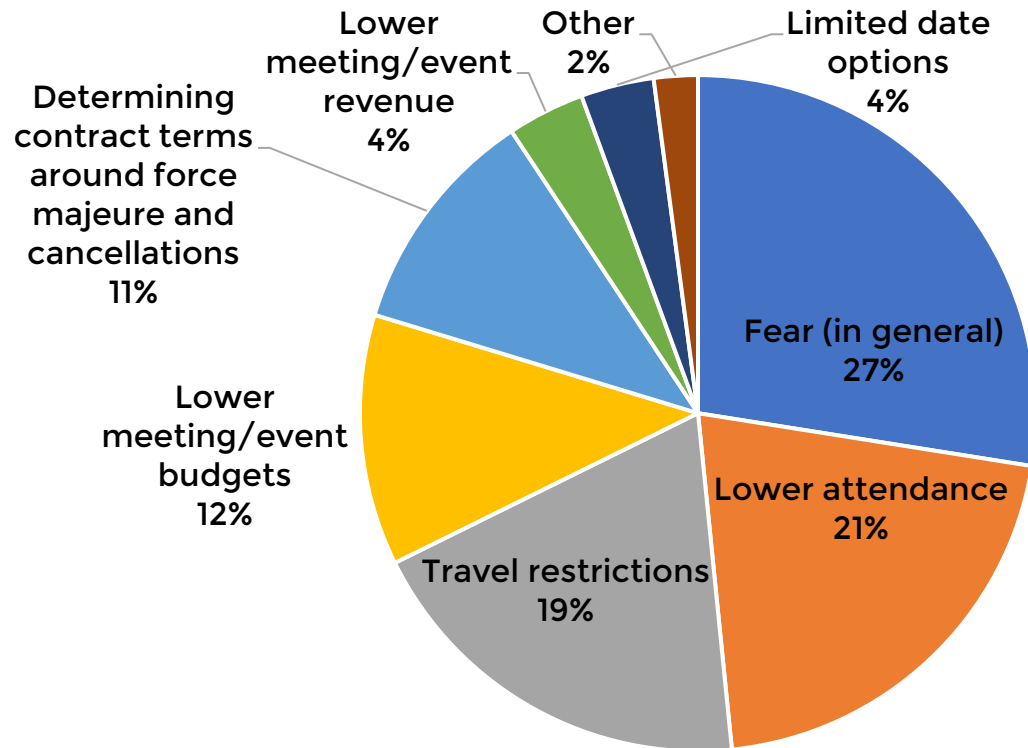
The Future of Face-to-Face

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

ANSWER	PERCENT
Hand sanitizer stations	90.4%
Space restrictions in meeting rooms to maintain distance between participants	79.4%
Plated, served or boxed meals only	66.6%
Reduced attendee count	61.2%
Only contracting hotels, venues, and event vendors with verifiable sanitation processes	60.2%
Virtual option for all face-to-face meetings/events	51.6%
Mandatory face masks for attendees	40.6%
Limited number of participants for tours/activities	35.3%
Temperature check at registration	34.8%
Medical/EMT personnel on staff	28.1%
No international travel/meetings (will stay domestic/local only)	22.5%
Considering ground transportation changes	11.0%
Private chartered flights	5.3%

Post COVID-19 Challenges

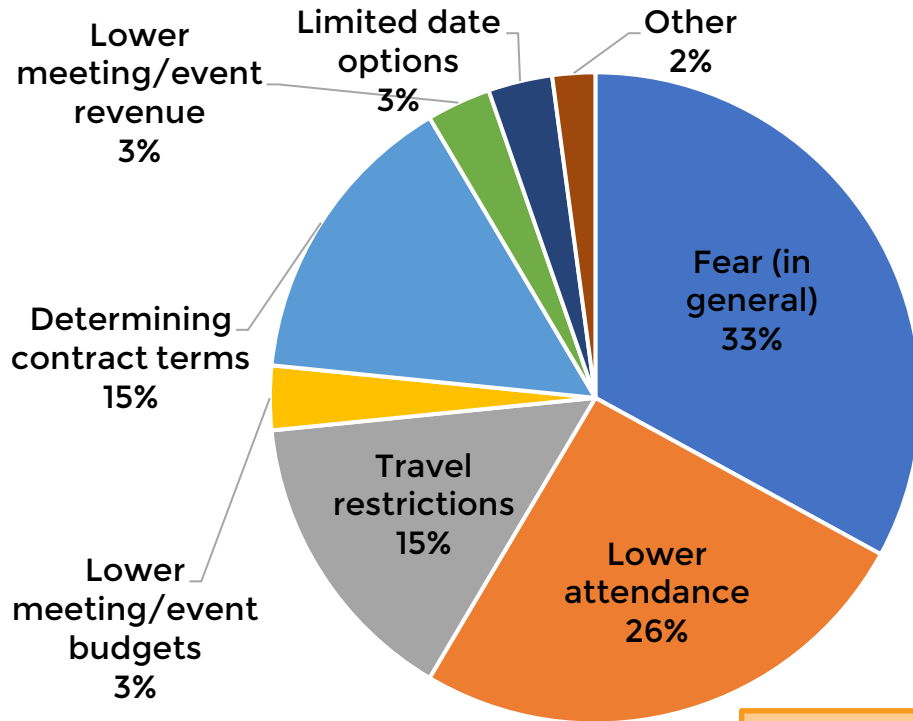
What is the #1 challenge you expect to face with your meetings, events, and incentives once the COVID-19 crisis dissipates?



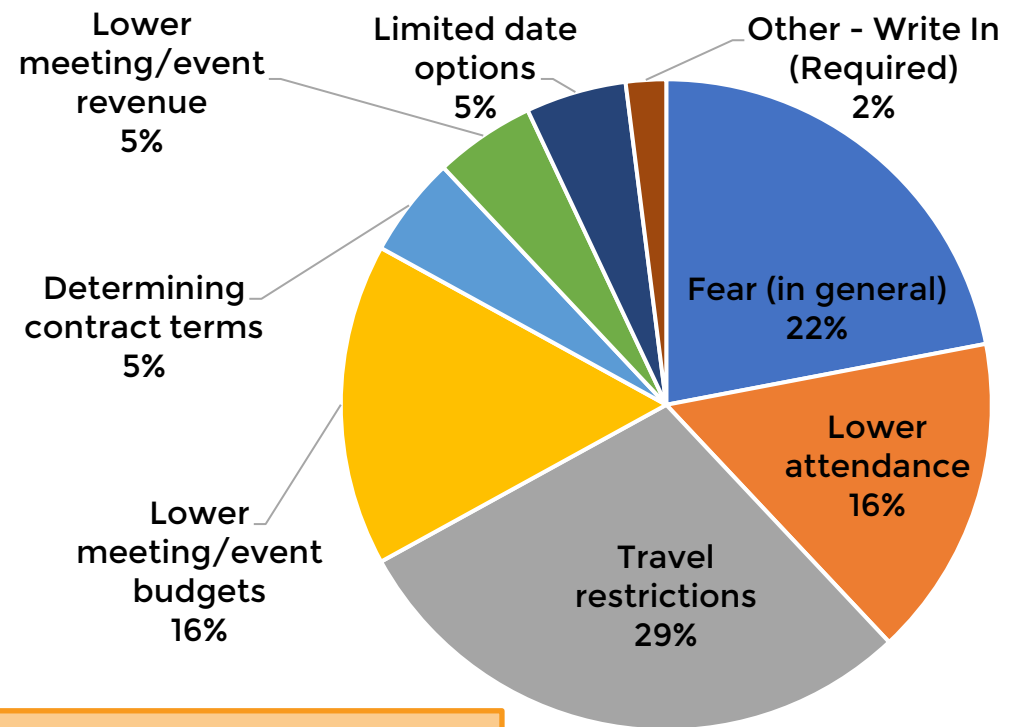
Fear is the #1 predicted challenge.

Post COVID-19 Challenges: USA vs Non-USA

USA



Non-USA



Travel restrictions are predicted to be the #1 challenge for non-USA planners, while **general fear** is predicted to be the #1 concern for USA planners.



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