

# Global DMC Partners

---

Q3 2020 MEETINGS & EVENTS PULSE SURVEY

# Key Insights

---



## **NEARLY THREE-QUARTERS OF PLANNERS ARE MOVING THEIR LIVE EVENTS TO VIRTUAL OR HYBRID IN 2021**

All the indicators are showing that 2021 will be a hybrid year. While live events are predicted to resume in Q1 or Q2 2021, many are planning to include a virtual option with their live event.



## **2021 BUDGETS ARE NOT INCREASING FOR THE VAST MAJORITY**

Planners are reporting a decrease in budgets due to various factors like the reallocation of event funds to other business areas.



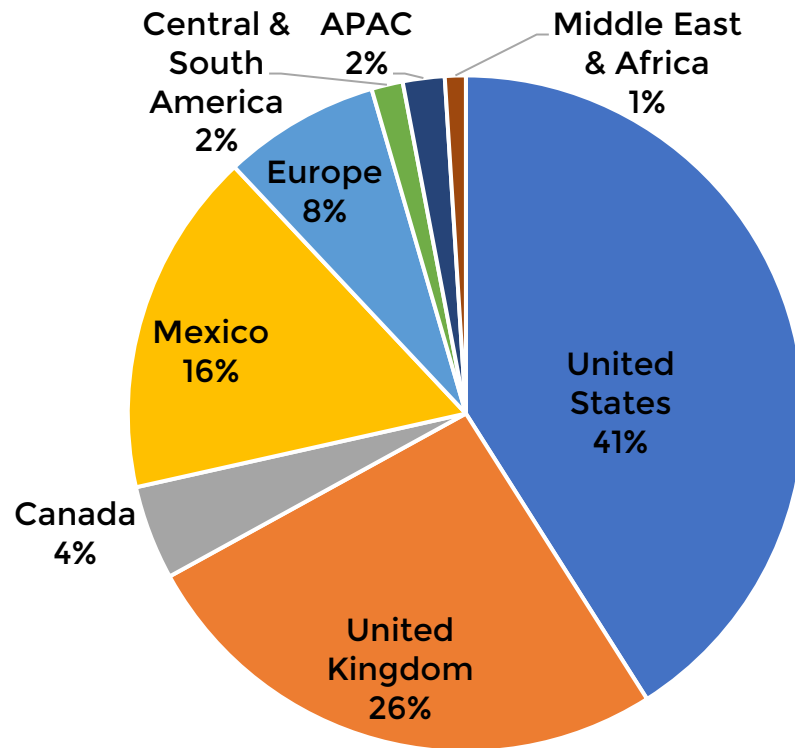
## **82% BELIEVE A VACCINE IS THE MOST IMPORTANT FACTOR IN BRINGING BACK FACE-TO-FACE**

Once face-to-face events resume, implementing new health & sanitation protocols, determining contract terms, and lower budgets are the top three expected challenges for planners in 2021.

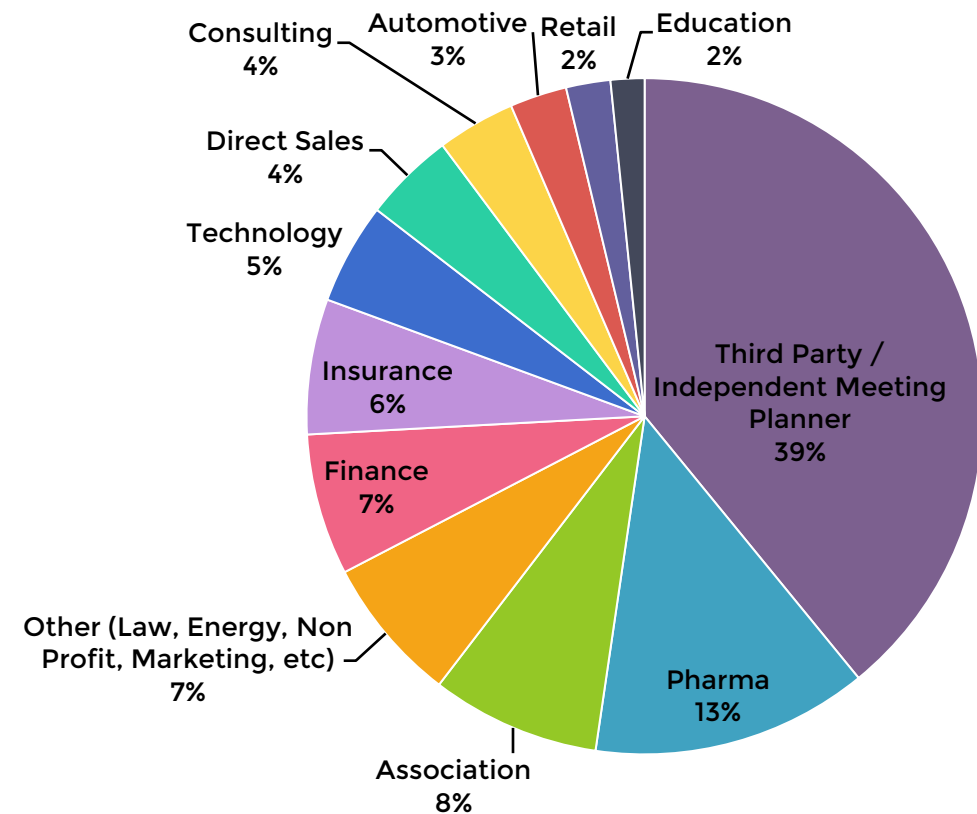
# 447 Respondents: 90% are Planners (vs Suppliers)

Survey conducted September 14, 2020 - September 30, 2020

Country where they are based:

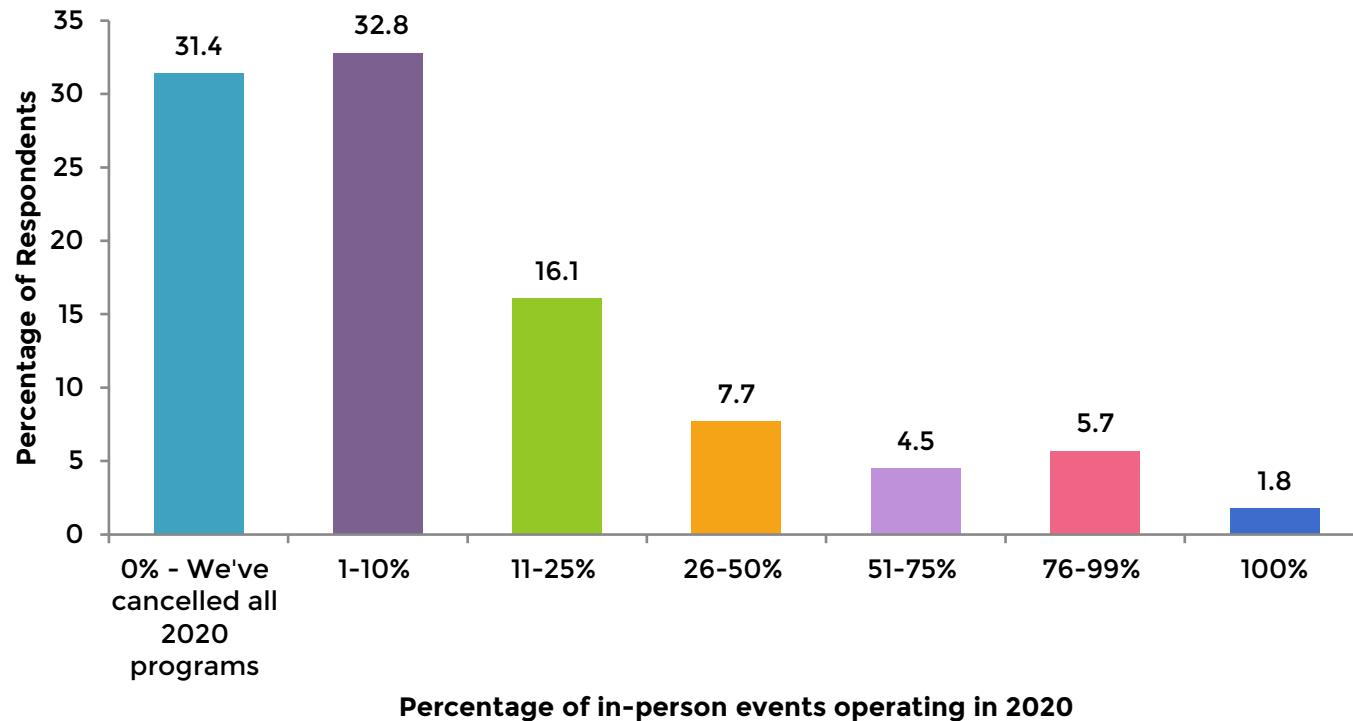


Industries Represented:



# 2020 Events – What has operated?

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

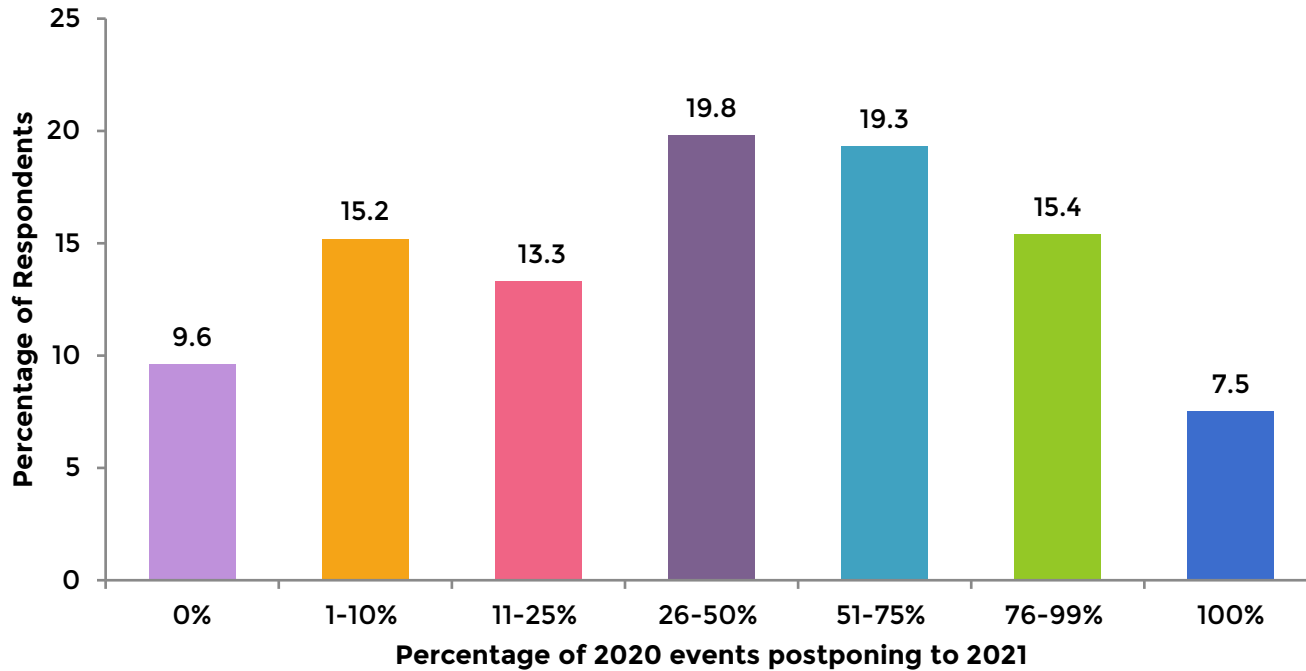


**80%** say that only **25% or less** of their in-person events operated in 2020.

In May, 56.2% predicted they would operate 25% or less of their in-person 2020 events. As 2020 has progressed, more planners are reporting that their live events have been cancelled or postponed in 2020.

# 2020 Events – How many are postponing?

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

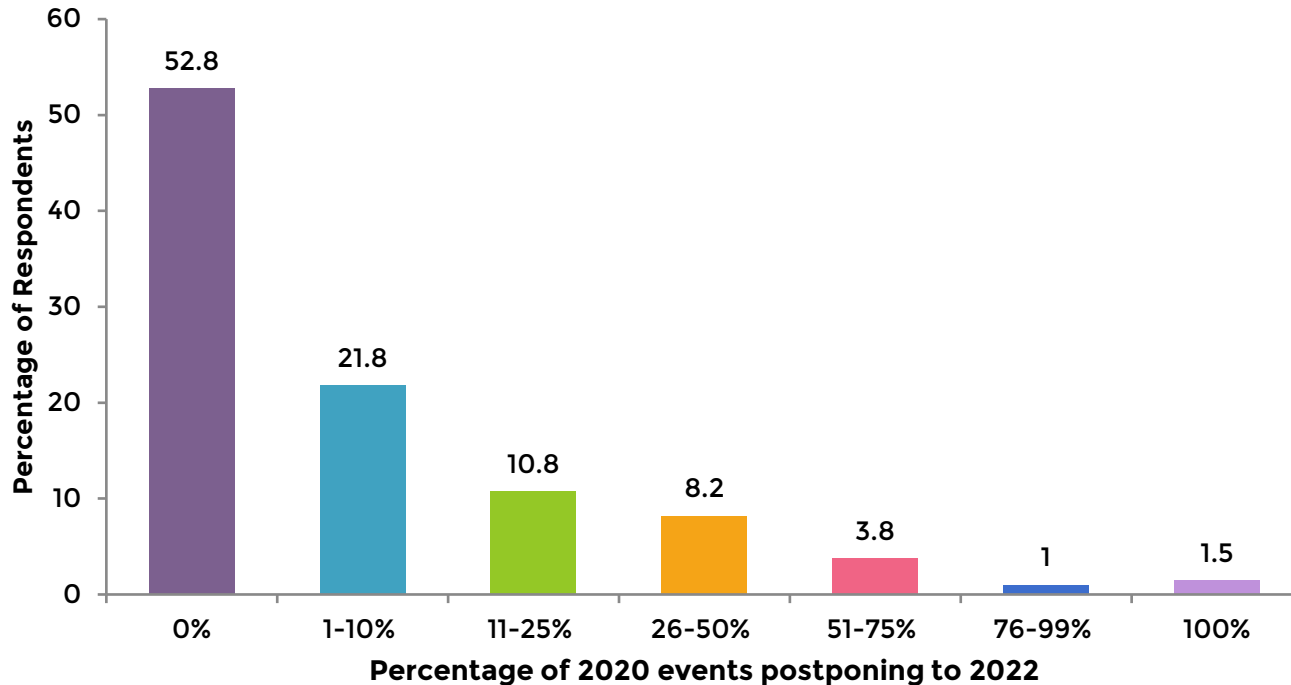


Over **90%** report that some portion or all of their 2020 events have been postponed to 2021.

This is similar to what was reported in GDP's Q2 Pulse Survey.

# 2020 Events – How many are postponing?

What percentage of your 2020 live meetings, incentives or events have been postponed to 2022?

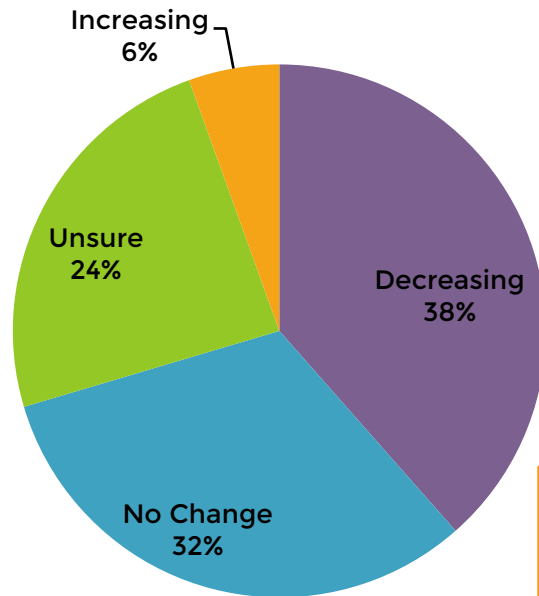


**47%** report that some portion or all of their 2020 events have been postponed to 2022.

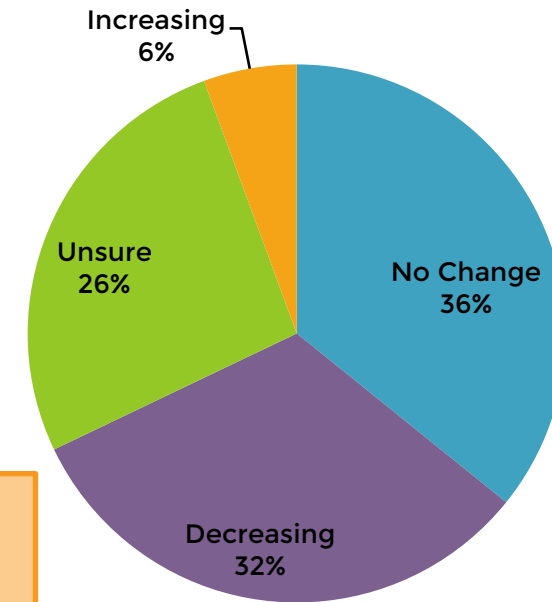
Either 2020 events were cancelled, postponed to 2021 (instead of 2022) or it's still too early to determine if anything will have to move to 2022.

# 2021 Budgets

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



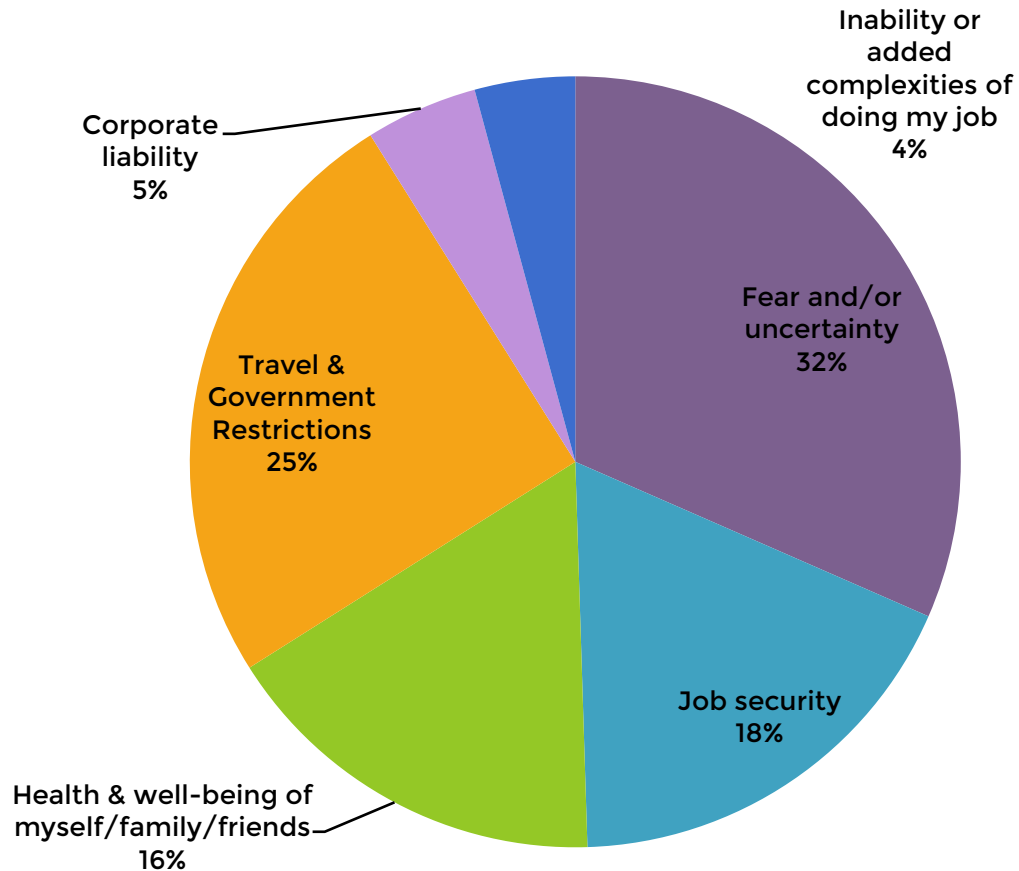
Are your budgets for incentives increasing, decreasing, or staying the same from 2020 to 2021?



**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?

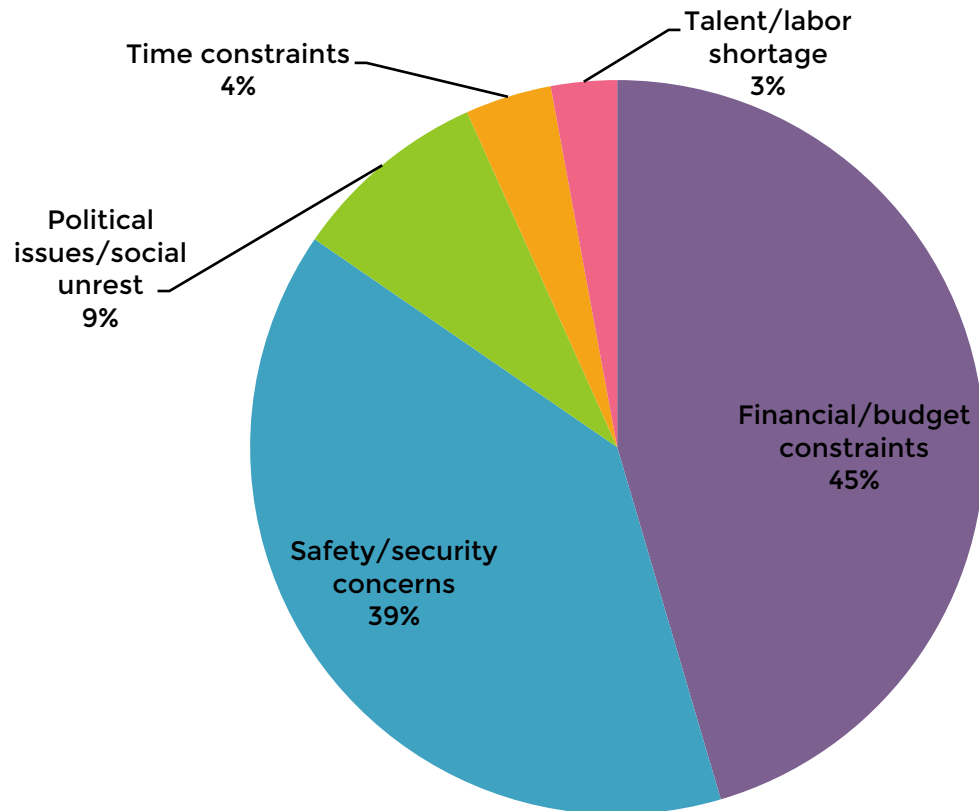


**General fear and uncertainty is the #1 current concern for most (32%), followed by Travel & Government Restrictions (25%), and Job Security (18%).**



# Second Largest Industry Concern (after COVID-19)

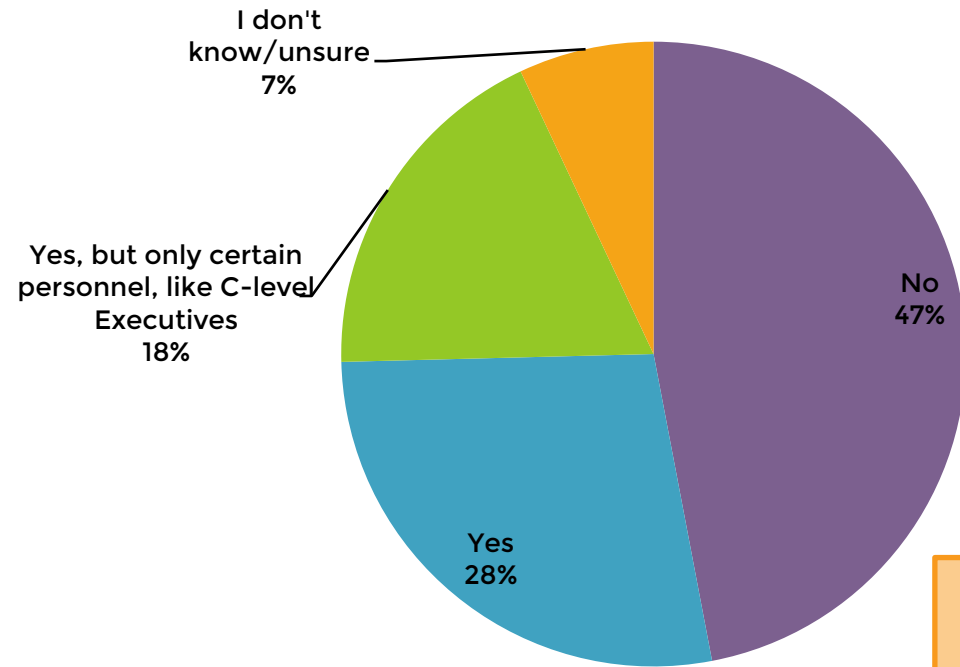
Other than COVID-19, what is the second largest issue or challenge that you currently face within the industry?



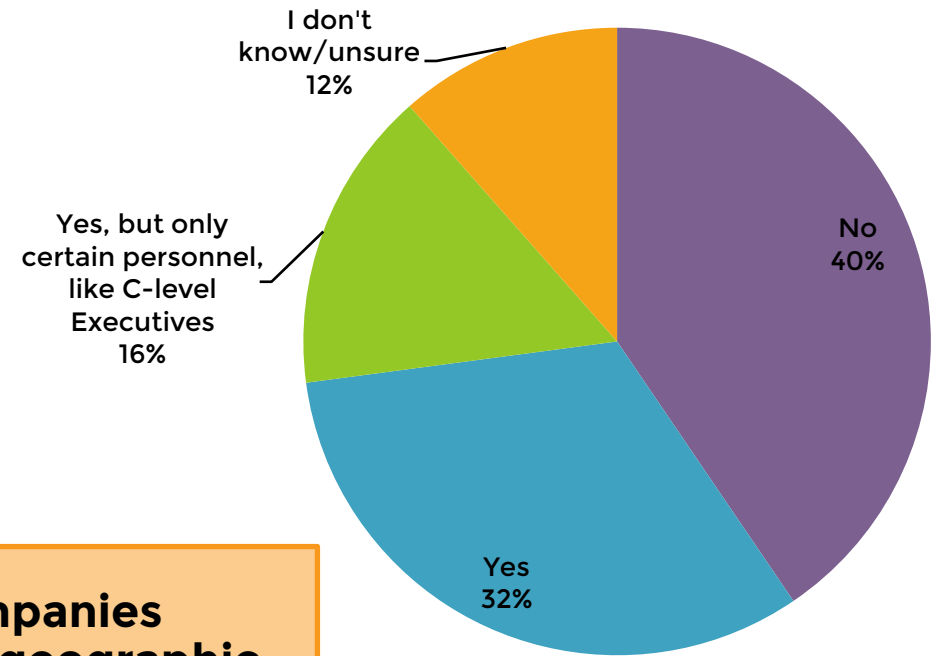
**Almost half of respondents (45%) cite Financial and Budget Constraints as their next largest concern after COVID-19, followed by Safety/Security Concerns (39%).**

# Are companies allowing employees to travel?

USA



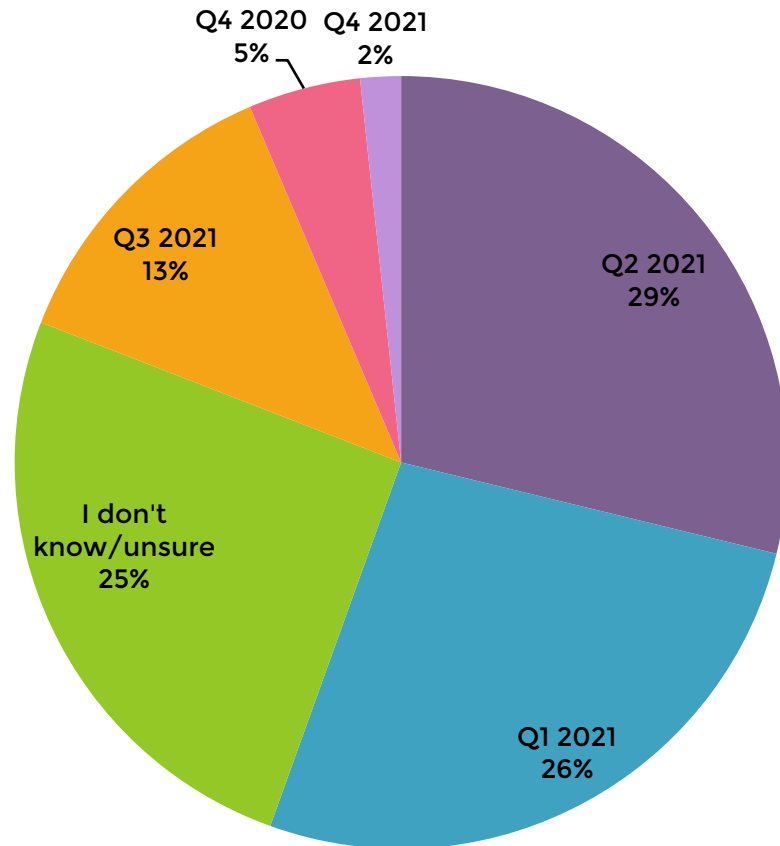
Non-USA



**Most companies regardless of geographic location, are not allowing their employees to travel.**

# When will employees travel again?

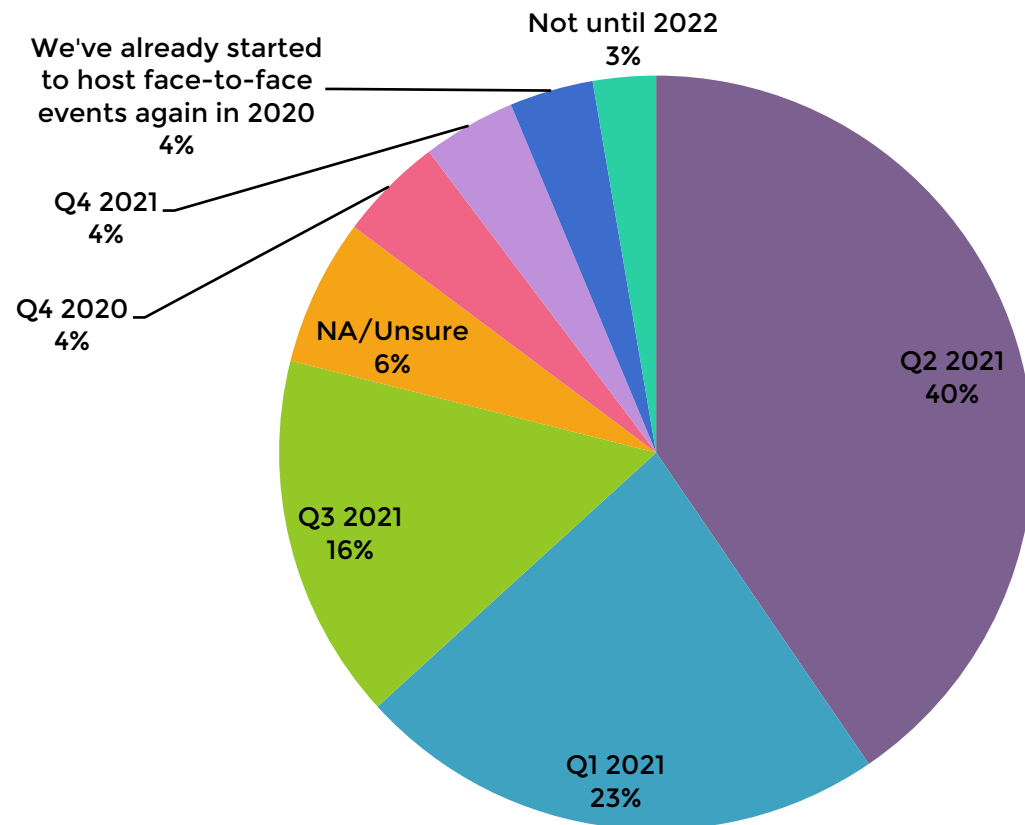
When do you predict your company will allow employees to travel again?



**55%** predict that their companies will allow employees to travel again in Q1 or Q2 2021.

# 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?\*

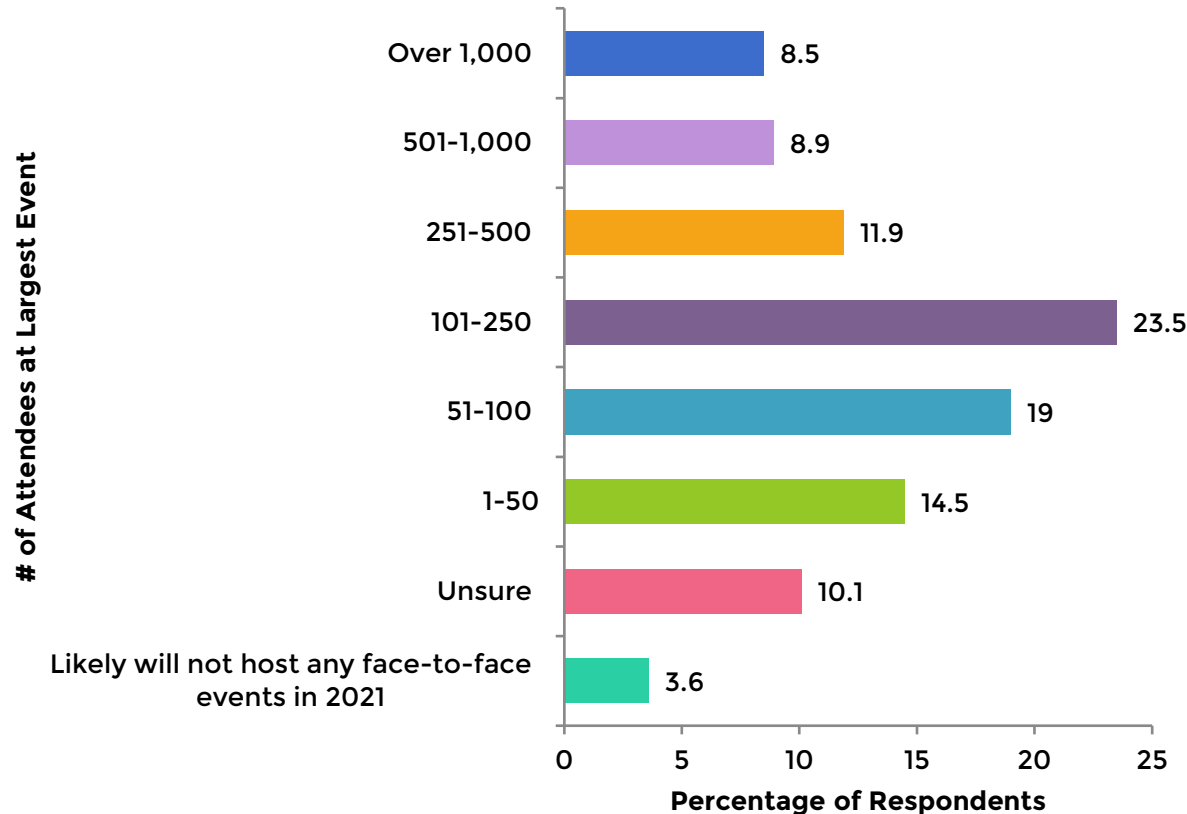


**The majority (63%) are predicting that they will host live events in the first half of 2021.**

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

# Size of face-to-face events in 2021

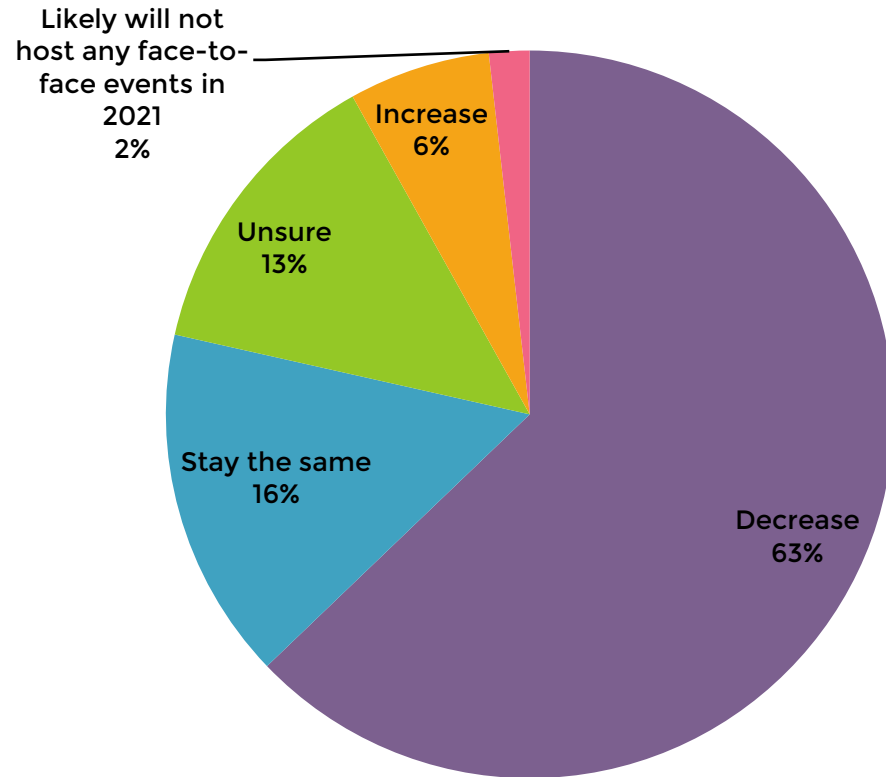
If your clients/company host face-to-face events in 2021, about how many attendees will you aim for at your largest program?



**The majority (57%)**  
are predicting less than 250  
attendees at their largest  
2021 event.

# Size of face-to-face events in 2021

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

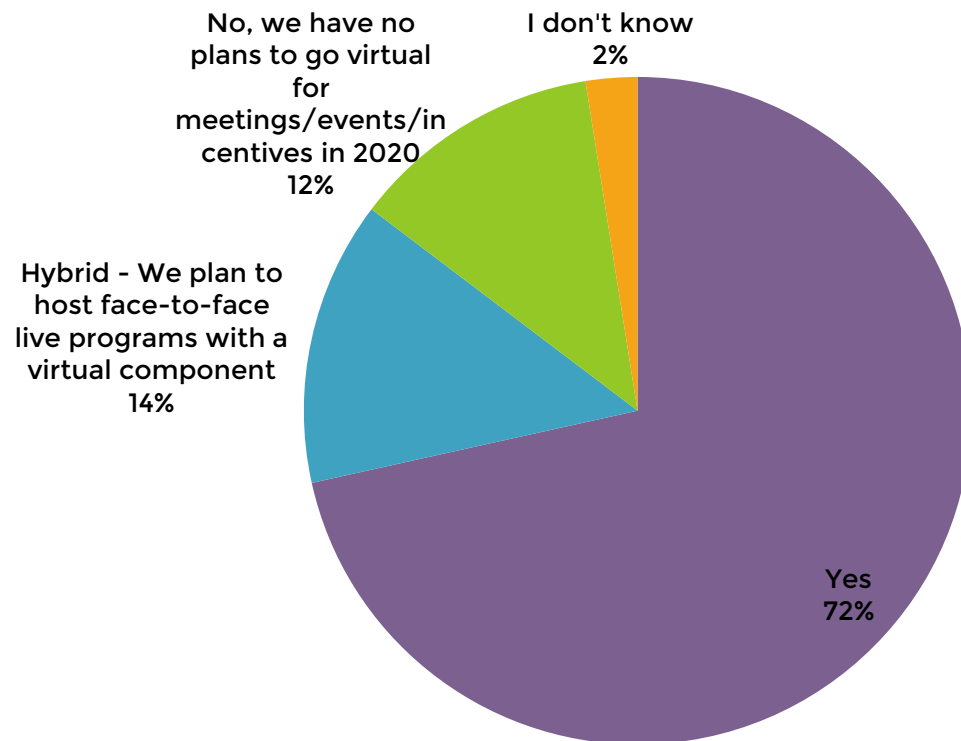


**The majority (63%)** are predicting average 2021 attendee numbers to decrease.

Comments cited include the need to lower numbers to adhere to physical distancing requirements, and anticipating that some attendees may not be comfortable traveling or attending an event.

# 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?



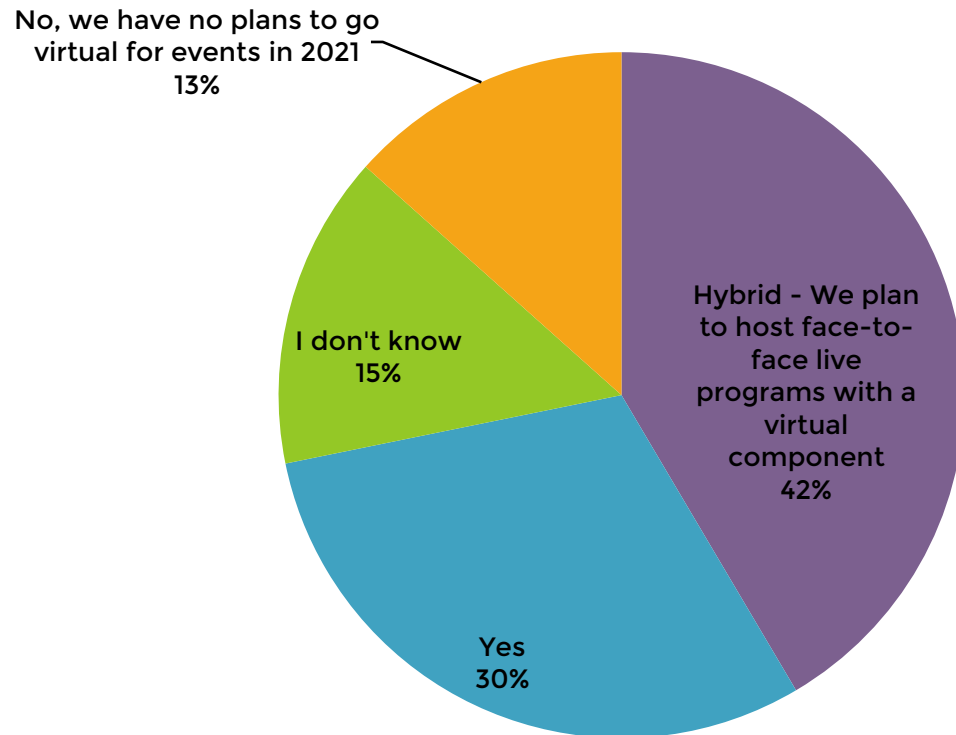
**86%** pivoted to virtual events or incorporated virtual aspects into their program in 2020.

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

In Q2, 69% planned to go virtual or incorporate virtual aspects into their program and only 52% 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 (72%) are either moving their live events to virtual or hybrid in 2021.**

This has shifted dramatically as compared to the Q2 Pulse Survey. In Q2, only 43% of respondents reported that they were pivoting to virtual or hybrid events in 2021. 33% reported they had no plans to host a virtual event in place of the live event in 2021.

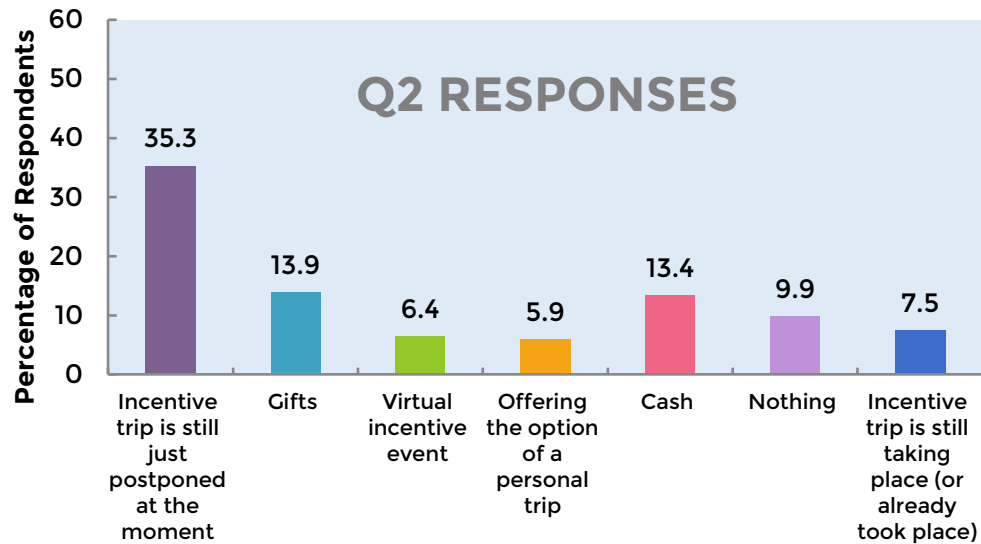


# 2020 Incentives

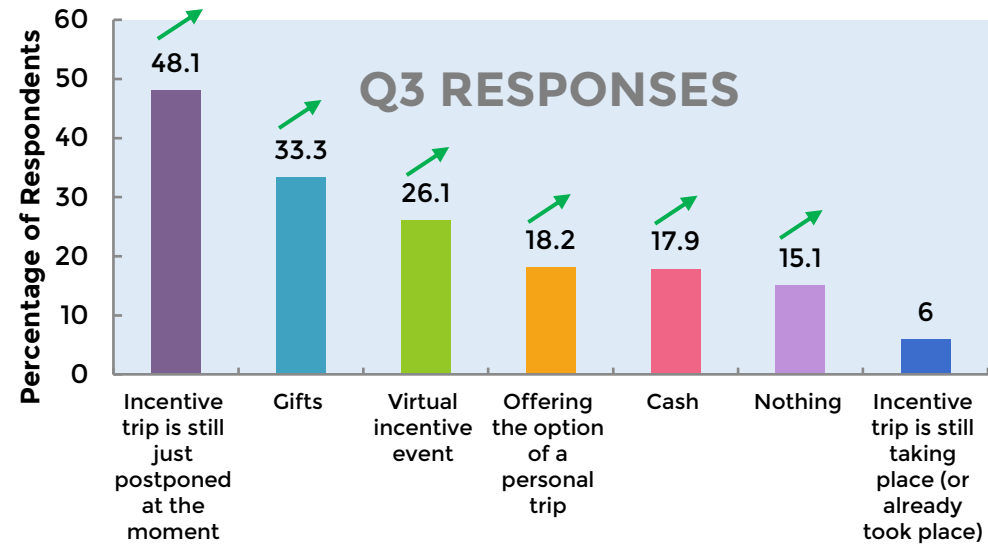
For 2020 incentive programs, what are you (or your clients) offering participants in lieu of a live incentive trip?

## Incentive trips are largely irreplaceable.

While many incentive trips are still just postponed, in Q3 more respondents reported offering additional options to their incentive trip such as a virtual incentive event, or gifts.



Replacement Options For Incentive Trips



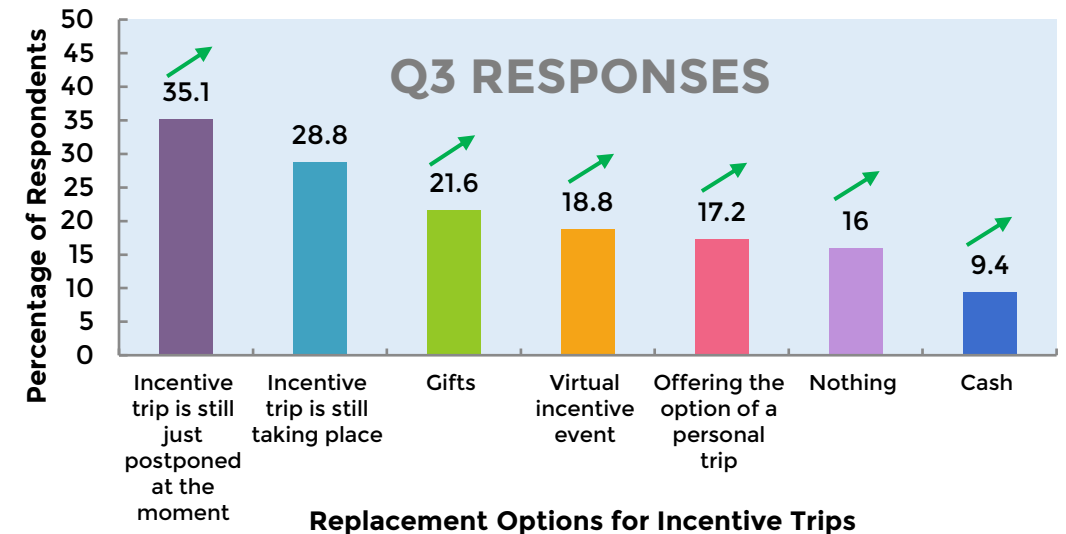
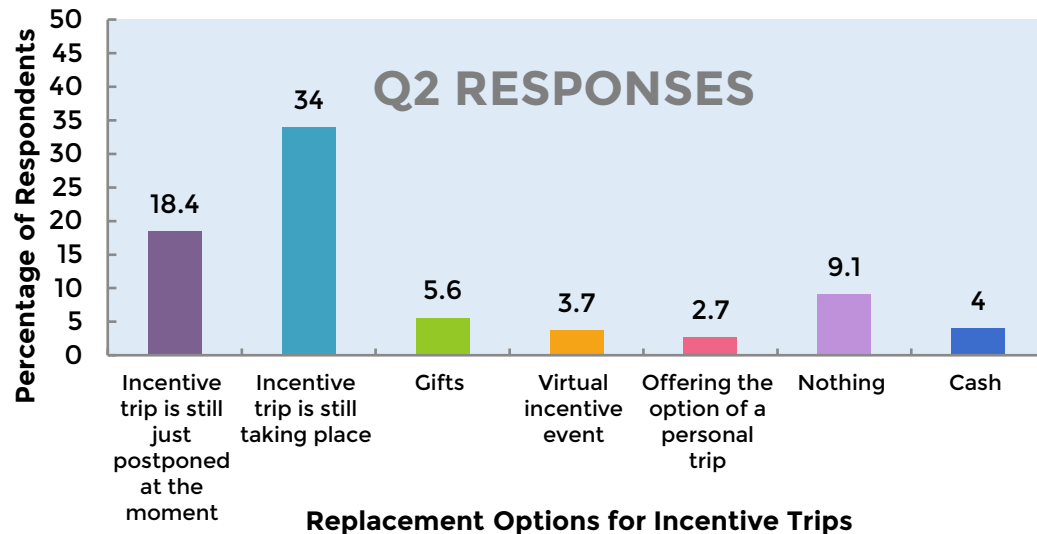
Replacement Options For Incentive Trips

# 2021 Incentives

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

**64% report that the incentive trip is still taking place.**

However, more respondent are now considering other replacement options for 2021 incentives as compared to the Q2 findings.



# 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%

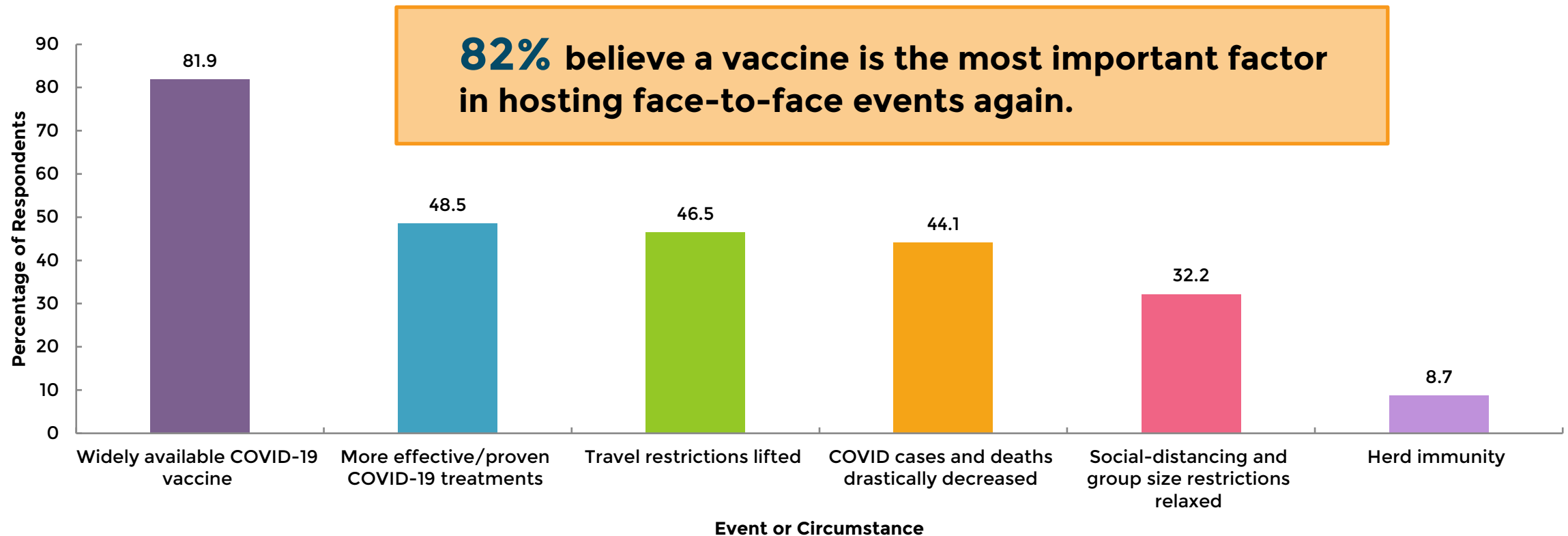
## Q3 RESPONSES

ANSWER	PERCENT
Hand sanitizer stations	93%
Space restrictions in meeting rooms to maintain distance between participants	88%
Plated, served or boxed meals only	79%
<b>Mandatory face masks for attendees</b>	<b>72% (+31)</b>
<b>Temperature check at registration</b>	<b>68% (+33)</b>
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%
<b>Considering ground transportation changes</b>	<b>37% (+26)</b>
Medical/EMT personnel on staff	32%
No international travel/meetings (will stay domestic/local only)	22%
Private chartered flights	5%

# What will bring back face-to-face?

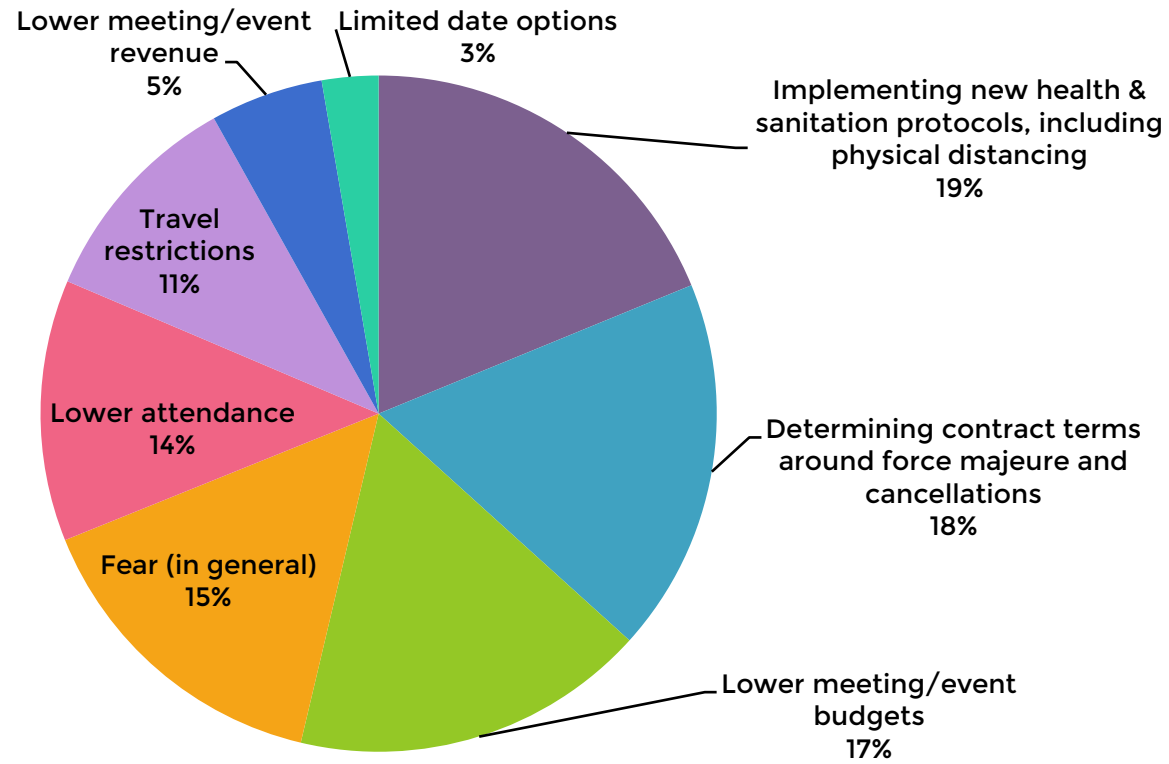
What do you anticipate will be the event or circumstance that will make your organization and/or clients more comfortable with hosting live meetings/events?

*(Respondents could select up to three)*



# Post COVID-19 Challenges

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



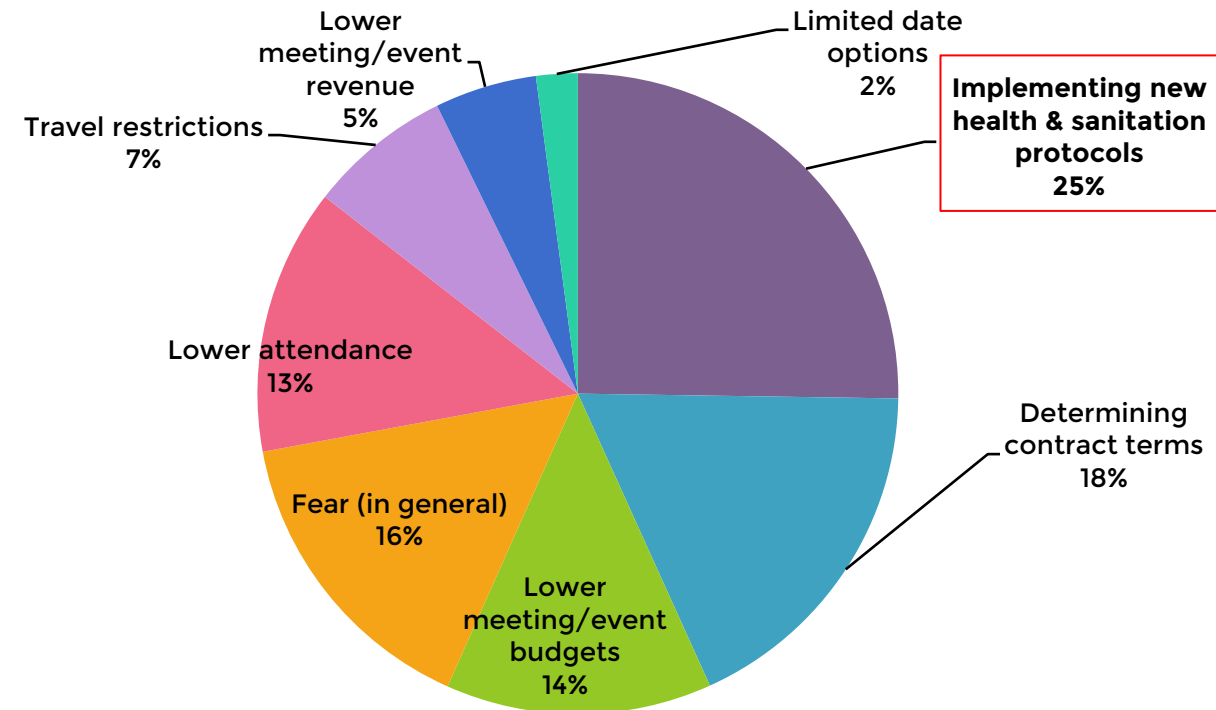
**Implementing new health & sanitation protocols, determining contract terms, and lower budgets are the top three expected challenges for planners in 2021.**

Fear was the #1 predicted challenge reported in Q2 followed by lower attendance and travel restrictions.

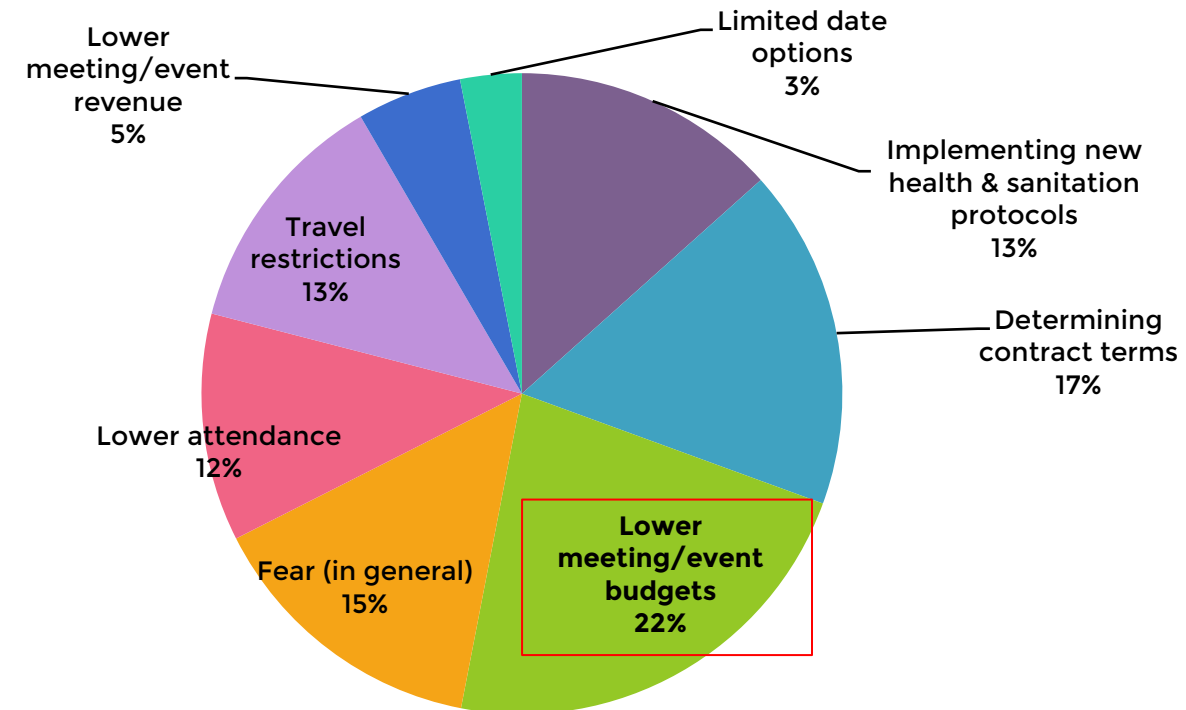
# Post COVID-19 Challenges

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

## USA



## Non-USA



# Contact Global DMC Partners

---

[INFO@GLOBALDMCPARTNERS.COM](mailto:INFO@GLOBALDMCPARTNERS.COM)

1-855-517-2432

[WWW.GLOBALDMCPARTNERS.COM](http://WWW.GLOBALDMCPARTNERS.COM)

Global  
DMC  
Partners 