

Encore Planner Pulse

Summer 2021



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EVENTS THAT TRANSFORM



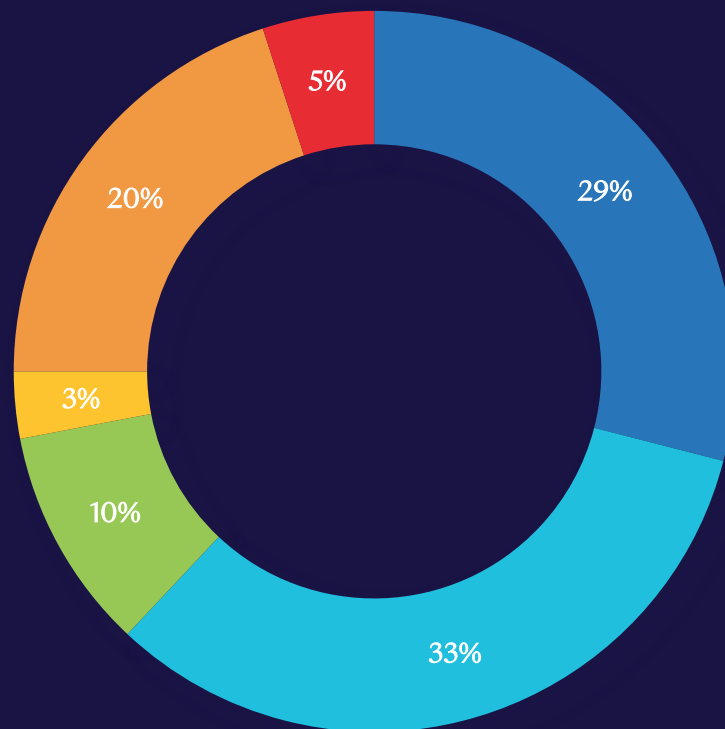
Survey objectives and respondents

Objectives

- > Monitor planner sentiment about hybrid, virtual and in-person events
- > Gain ongoing perspective on industry recovery

Respondents

- > 1,530 respondents
- > Primarily corporate and association planners



- Corporate
- Association
- Third Party
- Freelance
- Marketing /Other
- Spec Event Producer

Planner Pulse executive summary



Planners are more optimistic about the return of events

4

Majority (56%) anticipate event spending will return to pre COVID-19 levels in 2022

Significantly more optimism, yet 32% still believe recovery won't return until 2023 or later

Over one-third have adopted a hybrid approach

6

Adoption has increased considerably in the past several months

Event mix shifting to both hybrid and in-person, with a sharp drop in planning for virtual meetings

Planners are choosing single in-person location format, with remote participation

Vast majority will or may utilize a digital strategy once in-person fully returns

Challenges with hybrid format are continuing to shift over time

11

Increased concern about planning complexity/cost with less concern about safety

Most agree vaccine roll-out will drive recovery

13

Confidence in recovery tied to key themes: vaccine distribution, return of business travel, and reduction in COVID-19 cases

Vast majority (79%) agree that COVID-19 vaccine roll-out will drive a quicker economic recovery

Most planners (79%) are fully vaccinated

Majority of planner organizations have lifted travel restrictions or planning to in the back half of this year

Positive sentiment toward attending in-person events

18

Majority (62%) have a positive attitude about in-person attendance

Most (67%) intend to host next in-person event in the back half of 2021

Only 11% are requiring vaccinations for attendance



Key finding 1

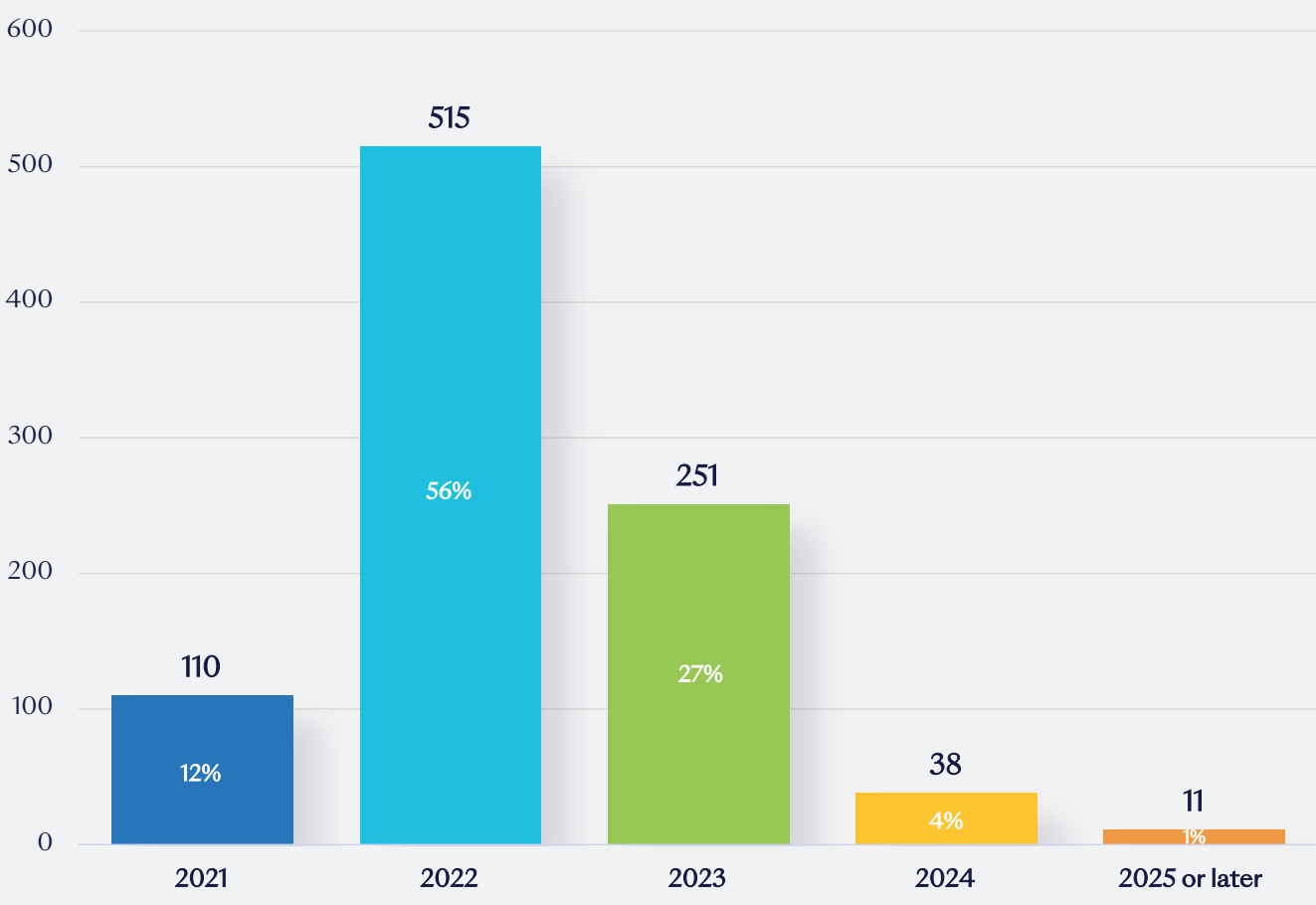
Planners are more optimistic about the return of events



Majority (56%) anticipate spending return in 2022

Optimism higher (+2% from Spring'21)
32% believe spending will return in 2023 or later

Q – When do you believe your total meeting spend will be equal to or greater than 2019 event spending (Pre COVID-19)?





Key finding 2

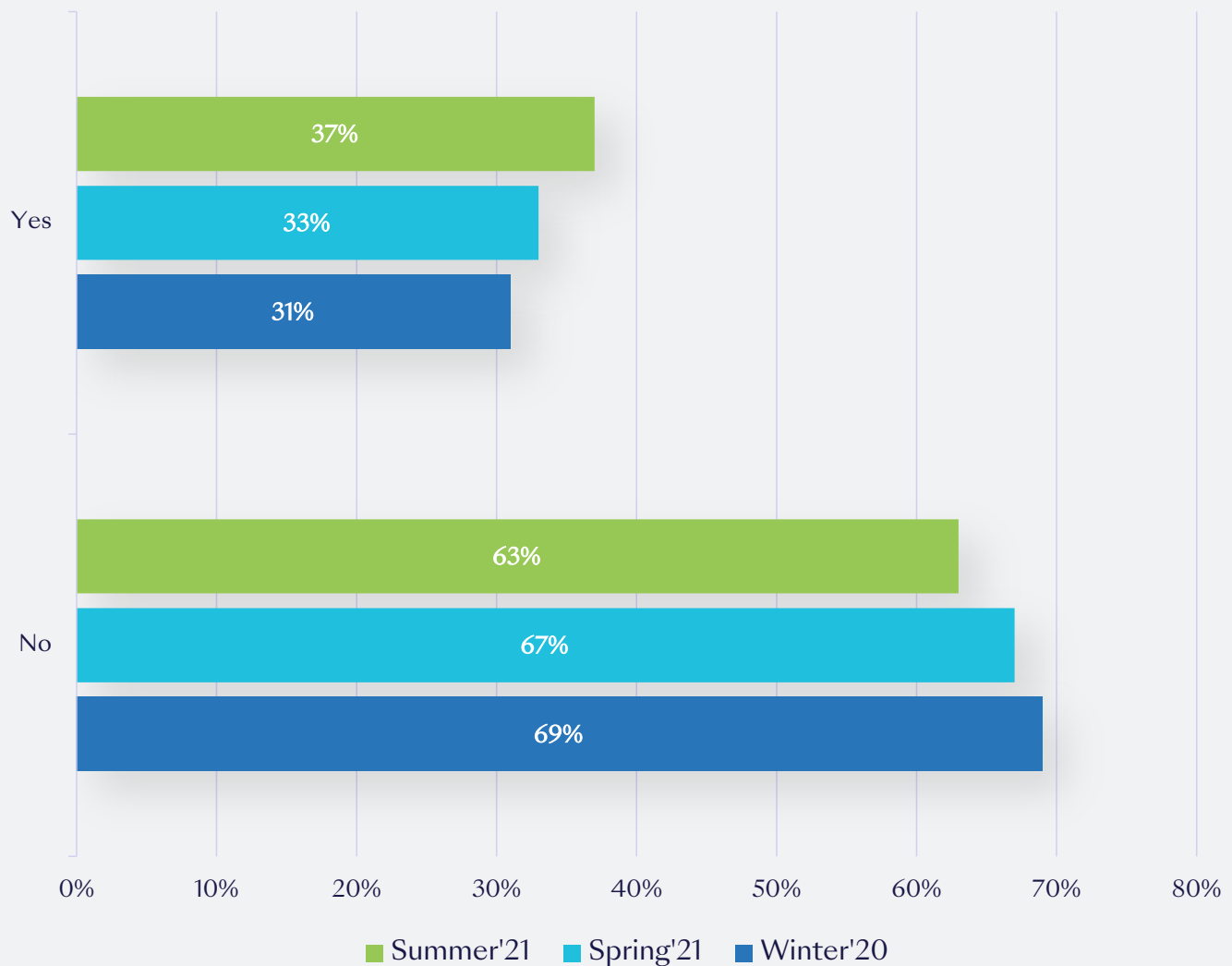
Over one-third
have adopted a
hybrid approach



37% have adopted a hybrid approach

Continuing increase in planning and/or execution for hybrid events

Q – Have you planned or executed a hybrid event in the last 6 months?

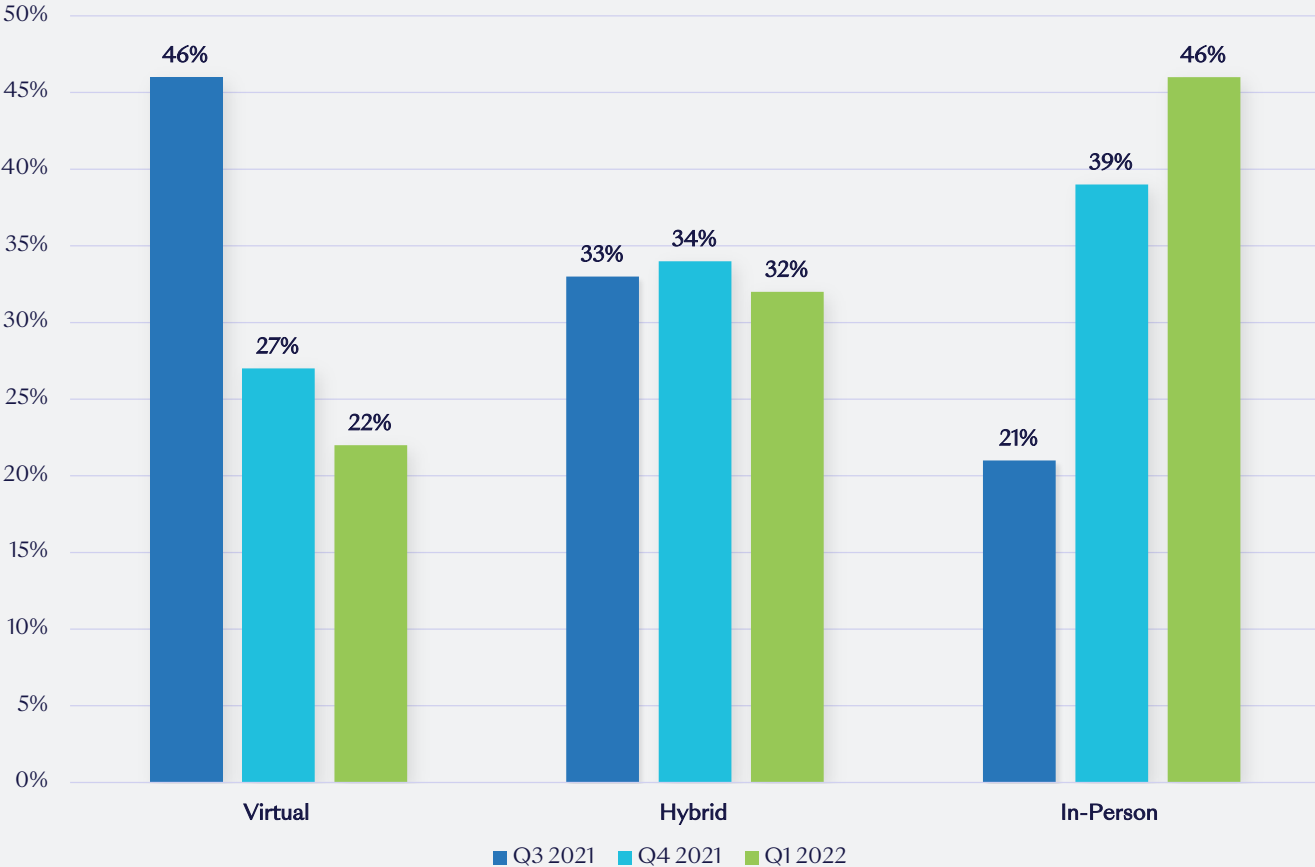




Event mix shifting to in-person and hybrid

Sharp drop in planning for virtual coupled with increase for in-person meetings

Q – In Q3 2021, Q4 2021, Q1 2022, what delivery format do you expect your events to take (%)?

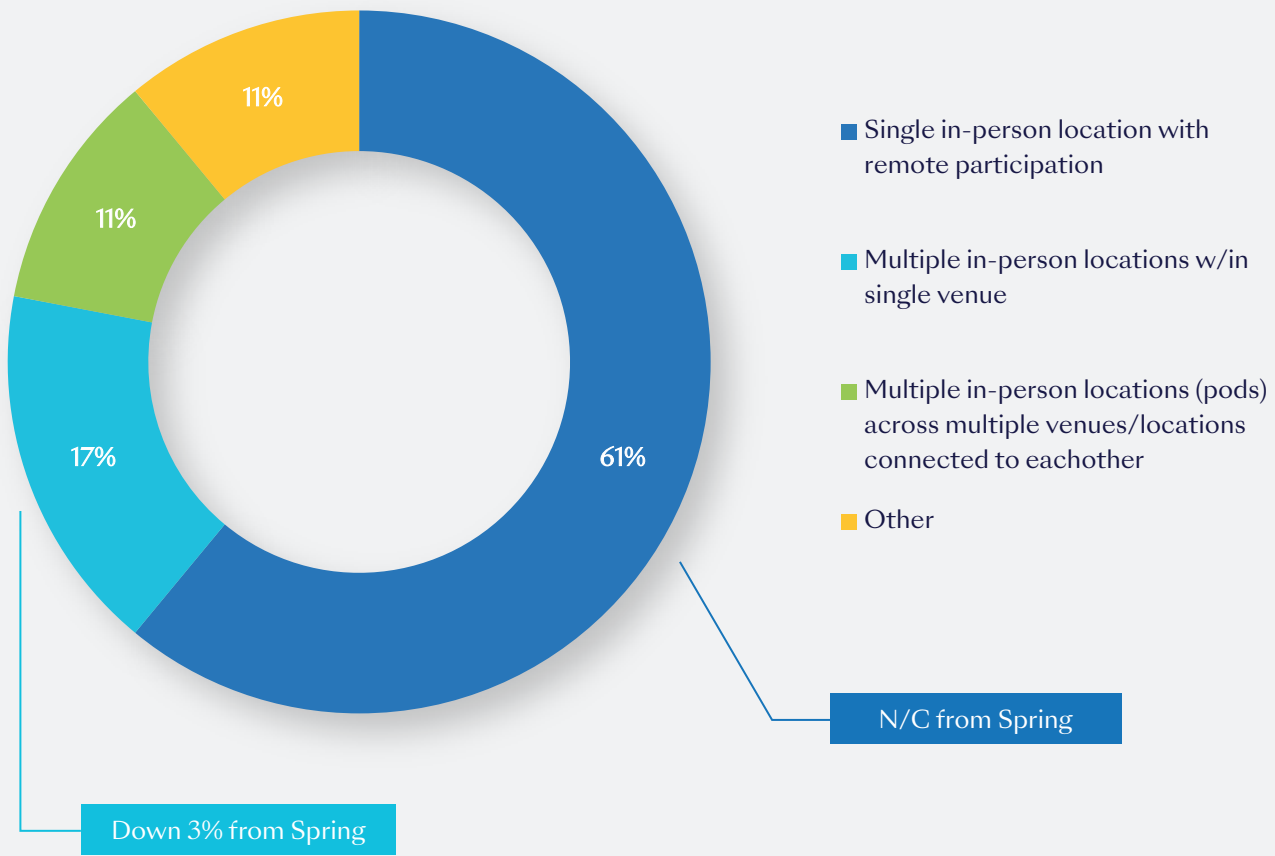




“Single in-person location” remains top format

Planners sticking with single in-person location with remote participants

Q – What format of hybrid event do you anticipate planning most often?

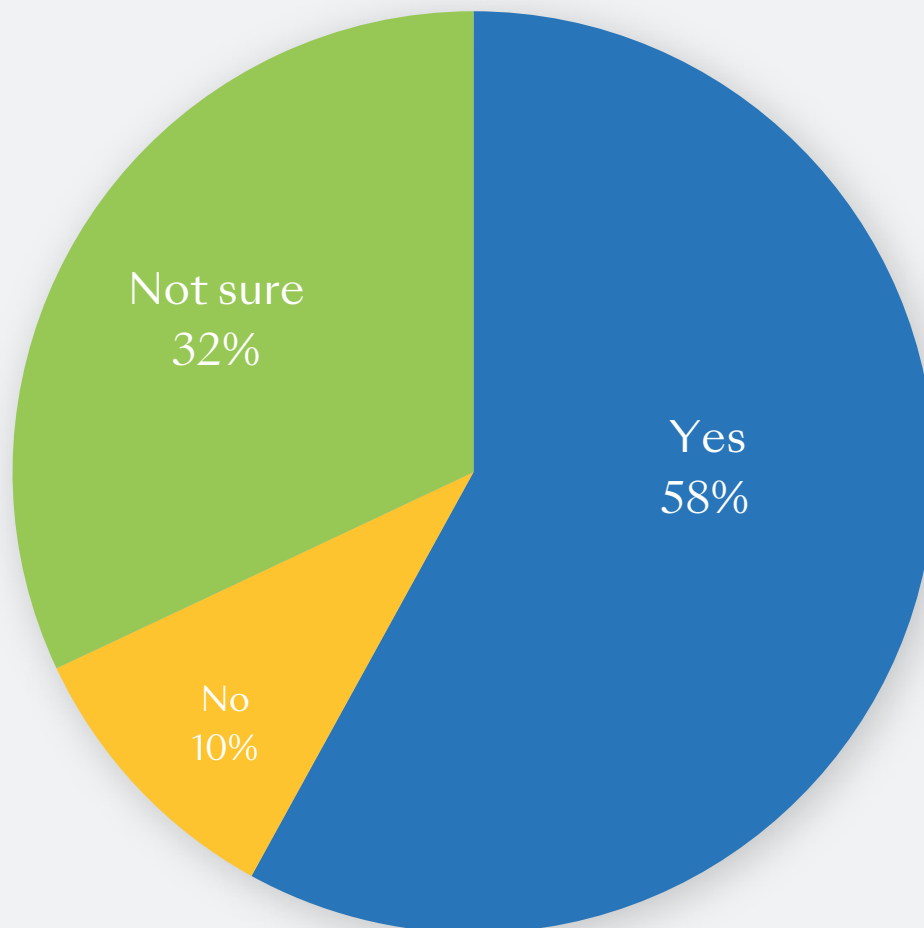




Virtual/hybrid will remain once in-person recovers

90% will or may utilize a digital strategy once in-person fully returns

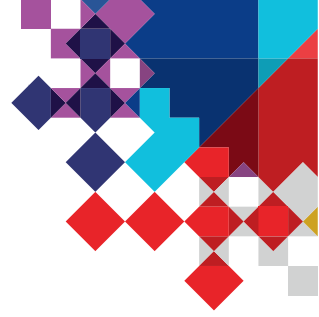
Q – Once you return to physical events, will you continue to employ a digital strategy to maintain your virtual audience? (i.e. make your events hybrid)





Key finding 3

Challenges with
hybrid format are
continuing to shift
over time



Hybrid challenges continuing to shift

Increased concern about planning complexity/cost with less concern about safety

Q – What do you see as the biggest challenge you face in planning hybrid events, ranked in order?

Challenge	Top 2 Box Fall '20	Top 2 Box Spring '21	Top 2 Box Summer '21	Change vs. Spring'21
Willingness of participants to attend in-person events	61%	43%	37%	(6%)
Maintaining safety protocols with in-person participants (e.g. distancing)	52%	38%	25%	(13%)
Effectively engaging both in-person and remote participants	25%	32%	31%	(1%)
Planning for two separate experiences (e.g. in-person, virtual)	14%	28%	33%	5%
Increased technology costs to enable remote participants	21%	27%	35%	8%
Increased venue costs to enable safety protocols (e.g. larger meeting spaces)	11%	14%	17%	3%
Lack of knowledge of how to plan a hybrid event (e.g. technology)	7%	11%	11%	-



Key finding 4

Most agree vaccine
roll-out will drive
recovery

Confidence in recovery tied to key themes



Responses consistent with Spring '21

Q – What's the one major event that needs to happen to provide confidence in returning to 2019 event spending?



Full vaccine distribution
Herd immunity
Concern about variants



Travel restrictions lifted
Travel confidence



Fewer COVID-19 cases
Pandemic officially over



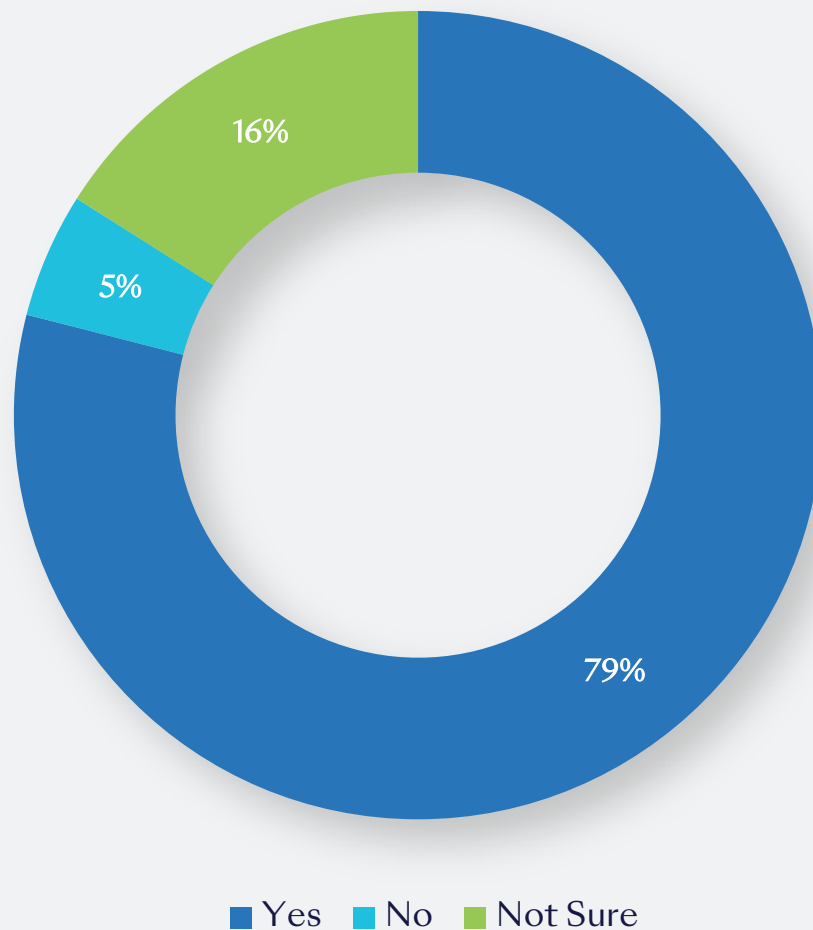
Large conferences
in-person



High confidence in recovery with vaccine roll-out

79% agree vaccines are driving recovery, while 16% remain uncertain

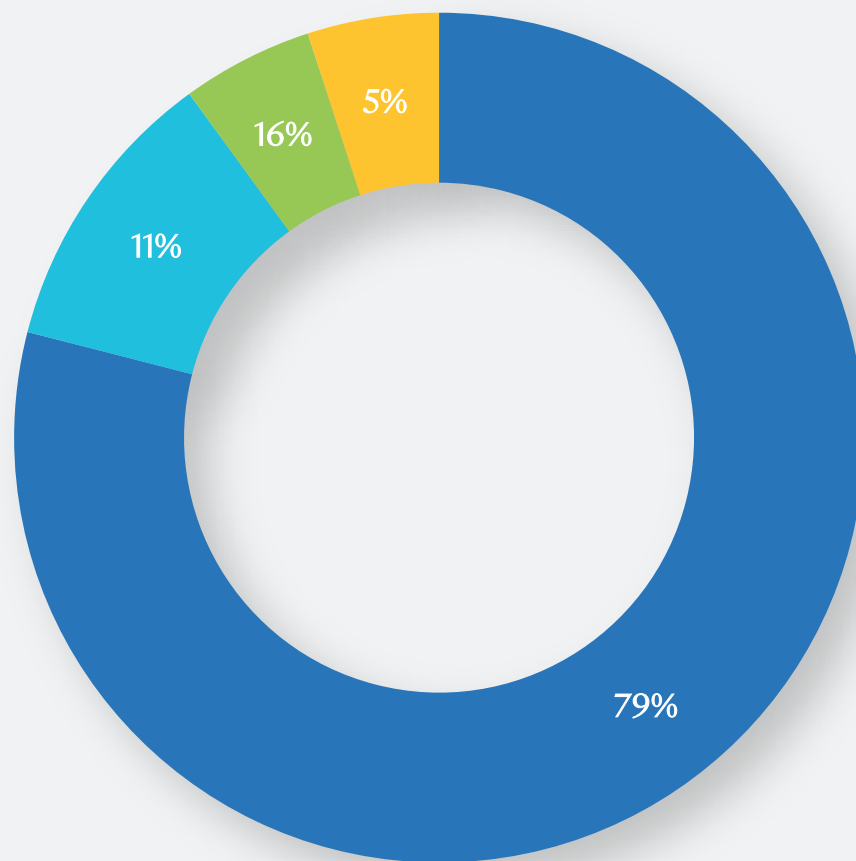
Q – Do you believe the roll-out of COVID-19 vaccines will lead to a quicker economic recovery for our industry?



79% of planners are fully vaccinated

Additional 11% are planning to be vaccinated

Q – Have you been fully vaccinated for COVID-19?



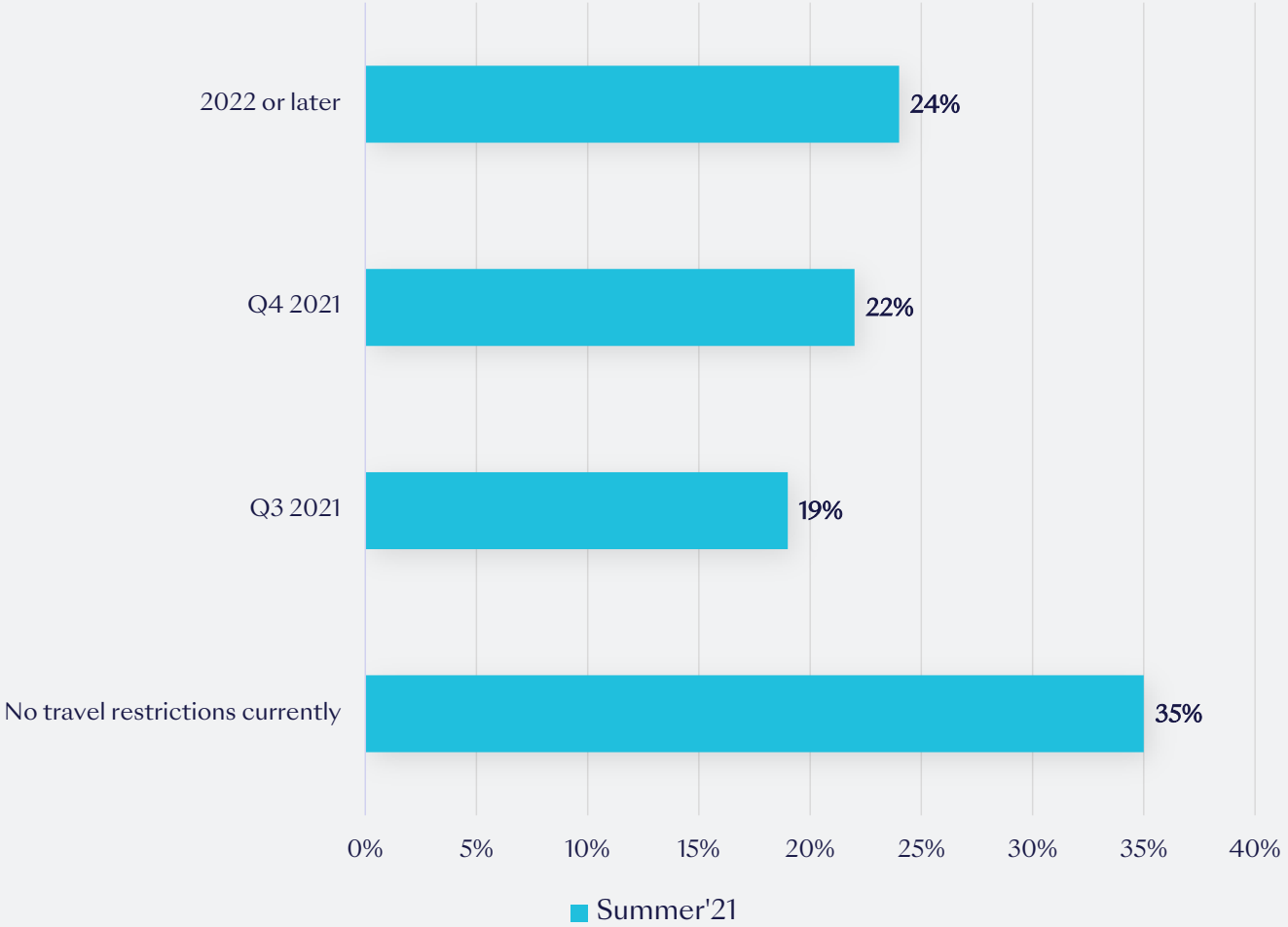
■ Yes ■ No, but planning to ■ No, not planning to ■ Other



Most travel restrictions lifted or to be lifted later in 2021

24% of planner organizations not expected to lift restrictions until 2022 or later

Q – When do you expect to resume travel in your organization:





Key finding 5

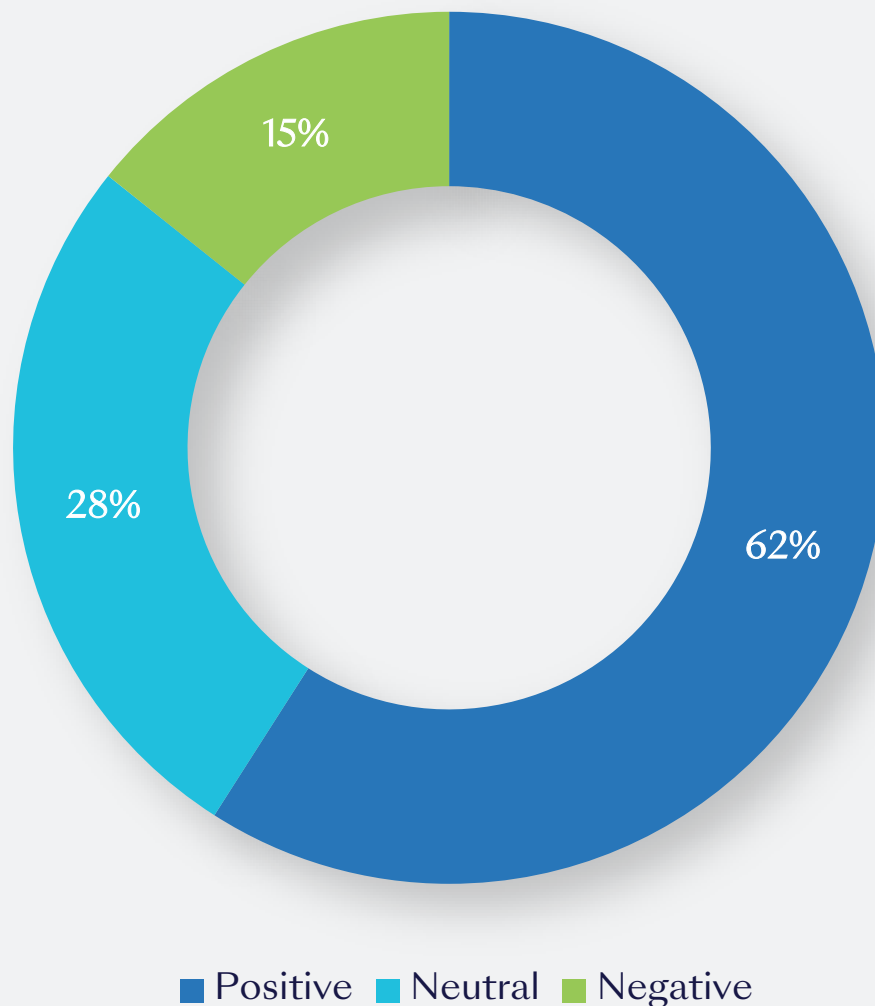
Positive sentiment
toward attending
in-person events



Overall positive sentiment toward in-person (62%)

Only 15% of planners have a negative attitude about in-person attendance

Q – Which one word best describes your current attitude toward attending in-person events?

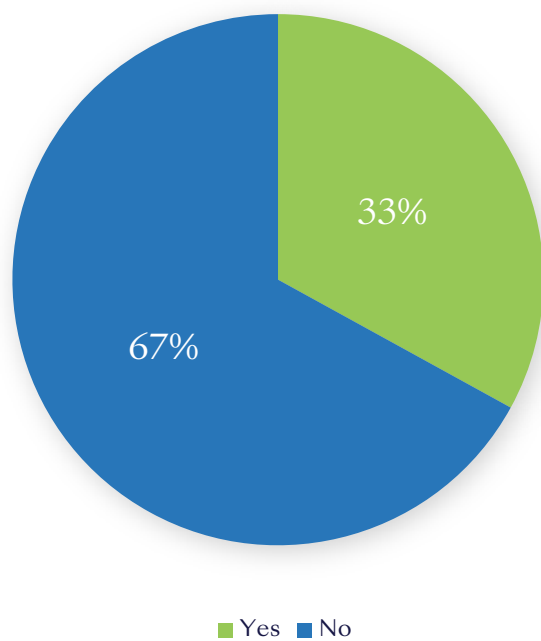




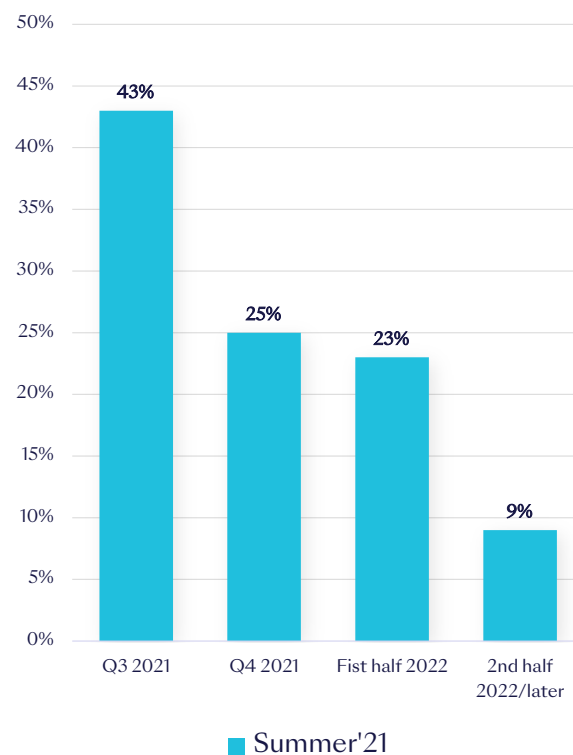
67% have recently hosted an in-person event

Most also expecting to host in-person events in the back half of 2021

Q – Have you been able to host an in-person event in the last six months?



Q – When did you/do you expect to host your next in-person event?

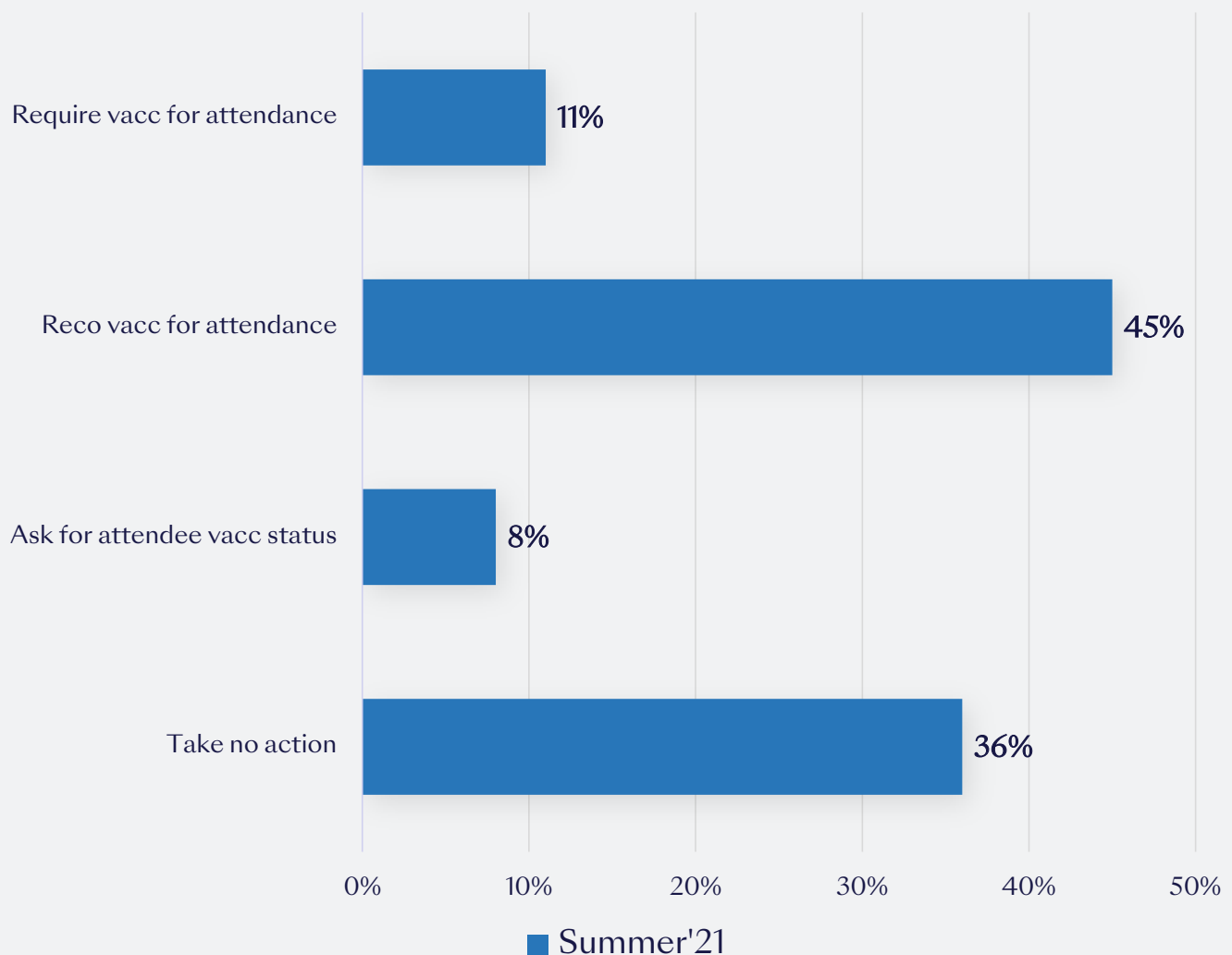


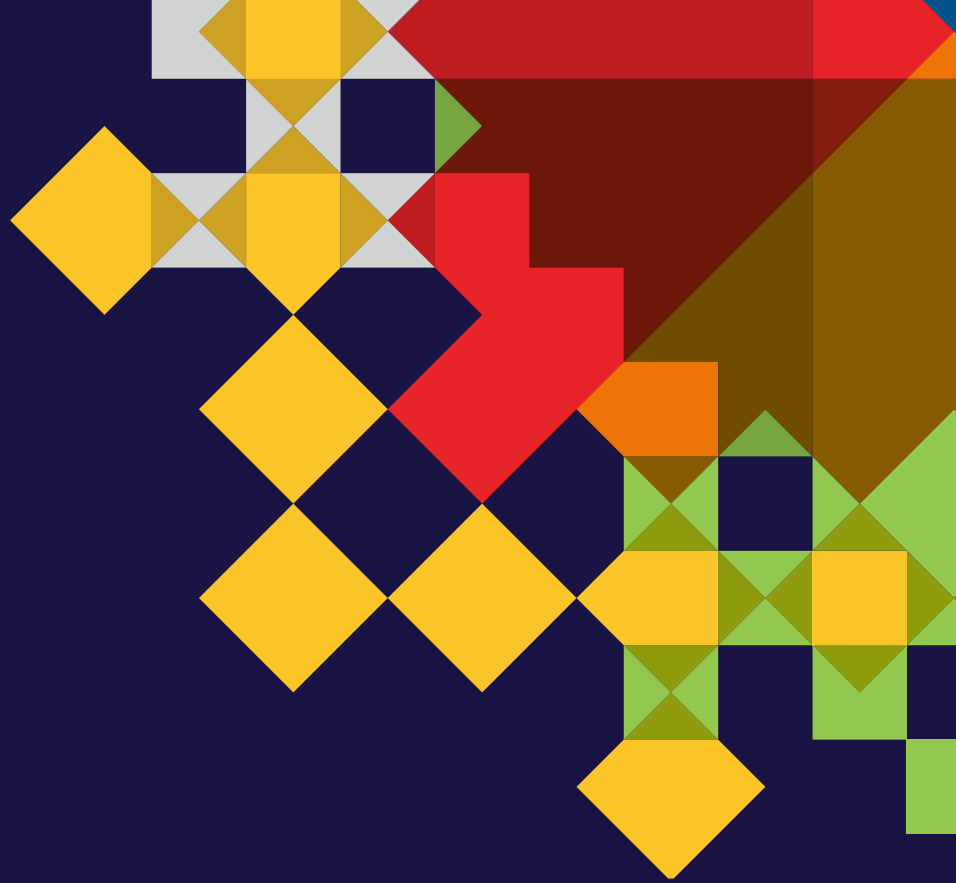


Only 11% requiring vaccinations for attendance

Majority only recommending attendee vaccination or taking no action

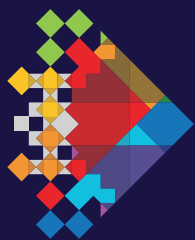
Q – In regard to attendee vaccinations, your organization will:





Other resources

- > [Hybrid+ Events Handbook](#)
- > [Hybrid+ Events Checklist](#)
- > [Hybrid+ Internet Connectivity Checklist](#)



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This report provides a summary of opinion-based survey responses and is not intended to present findings of fact or make any fact-based claims or guarantees as to when live, in-person events will resume. Any projections, analysis, modeling or recommendations contained in this report are based on opinion survey results and subject to inherent uncertainty. Actual results may differ from the survey results presented in this report, and Encore does not guarantee the accuracy or the reliability of the opinions expressed herein. This report contains proprietary and/or confidential information of Encore and may not be quoted or reproduced (in whole or in part) without express prior written consent.

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