



Encore Planner Pulse

Spring 2021



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EVENTS THAT TRANSFORM



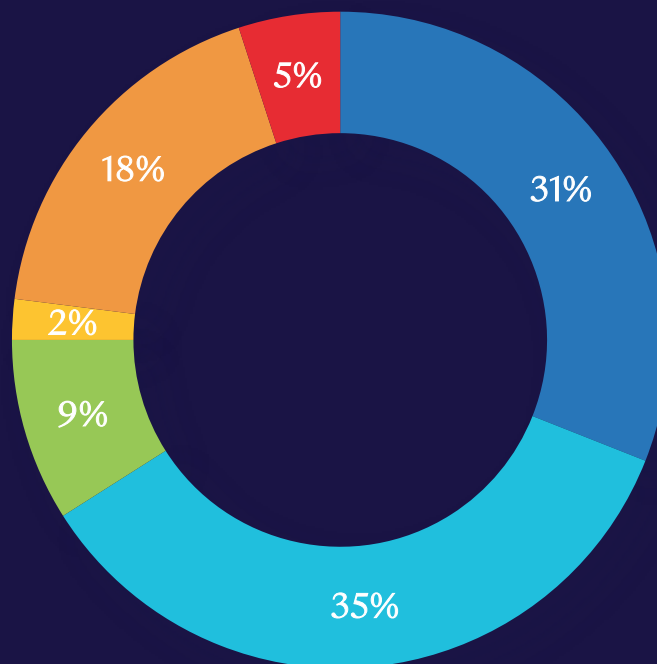
Survey Objectives and Respondents

Objectives

Understand planner sentiment re:
hybrid, virtual and in-person events
Gain perspective on industry recovery

Respondents

Primarily corporate and association
planners
1700 respondents



■ 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 (54%) anticipate event spending will return to pre COVID-19 levels in 2022

Significantly more optimistic than November, yet 36% still believe recovery won't return until 2023 or later

Hybrid is growing, yet adoption still in early stage

6

Event mix is shifting to hybrid; yet virtual still dominates

Post recovery, hybrid and virtual will remain; long-term outlook uncertain

Planner challenges with hybrid format are shifting

12

Participant willingness to attend in-person events and safety protocols remain top two challenges

Growing concerns include: participant engagement, hybrid planning complexity and costs

Most planners agree that vaccine roll-out will drive recovery

14

Vast majority of planners (81%) agree that the COVID-19 vaccine roll-out will drive a quicker economic recovery

Other major events that need to happen to drive confidence in recovery fall into these key themes:
(1) lifting of mask mandate, (2) return of business travel and (3) availability of travel budgets



Key finding 1

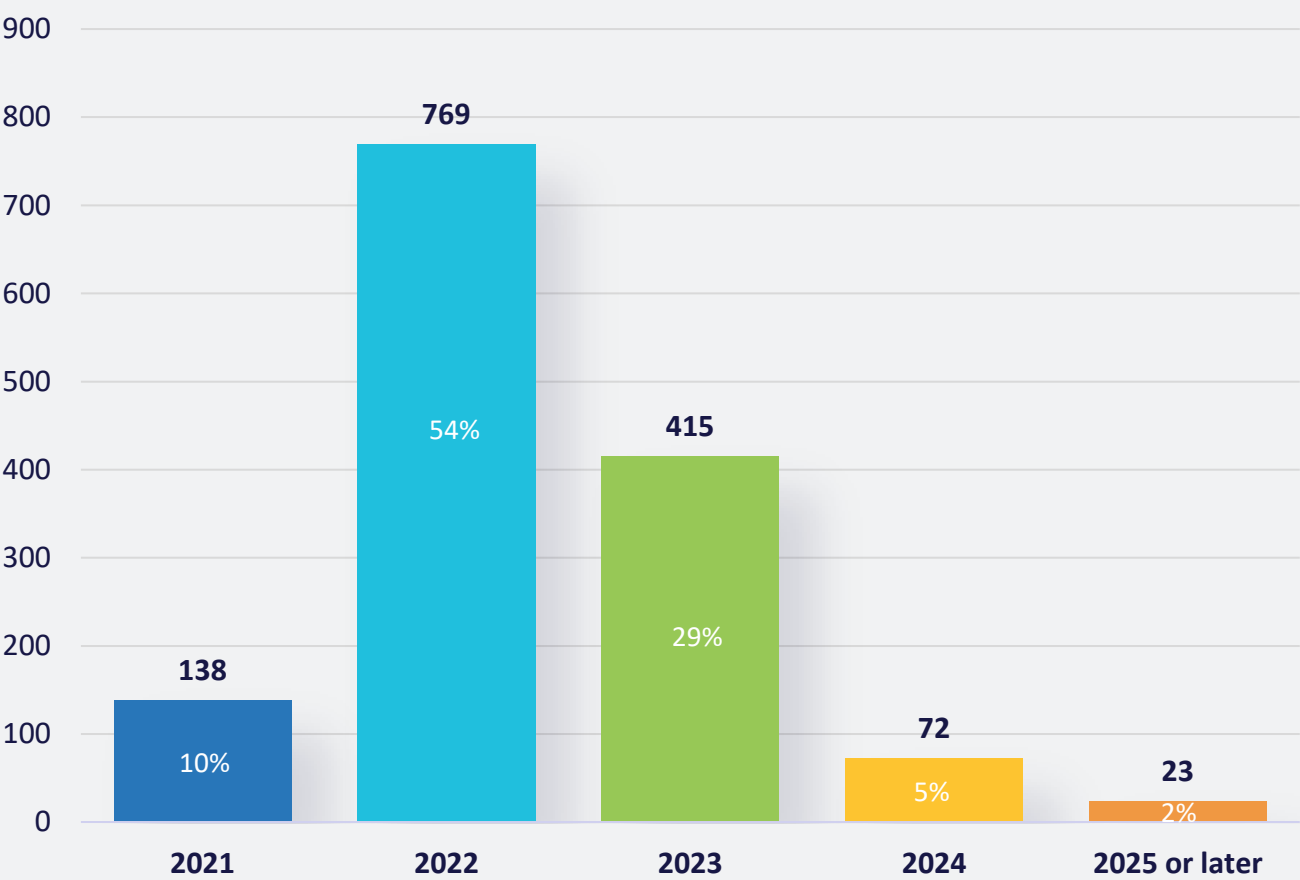
Planners are more
optimistic about the
return of events



Majority (54%) anticipate spending return in 2022

36% believe spending will return in 2023 or later

Q – When do you believe your total meeting spend will return to 2019 spending levels?





Key finding 2

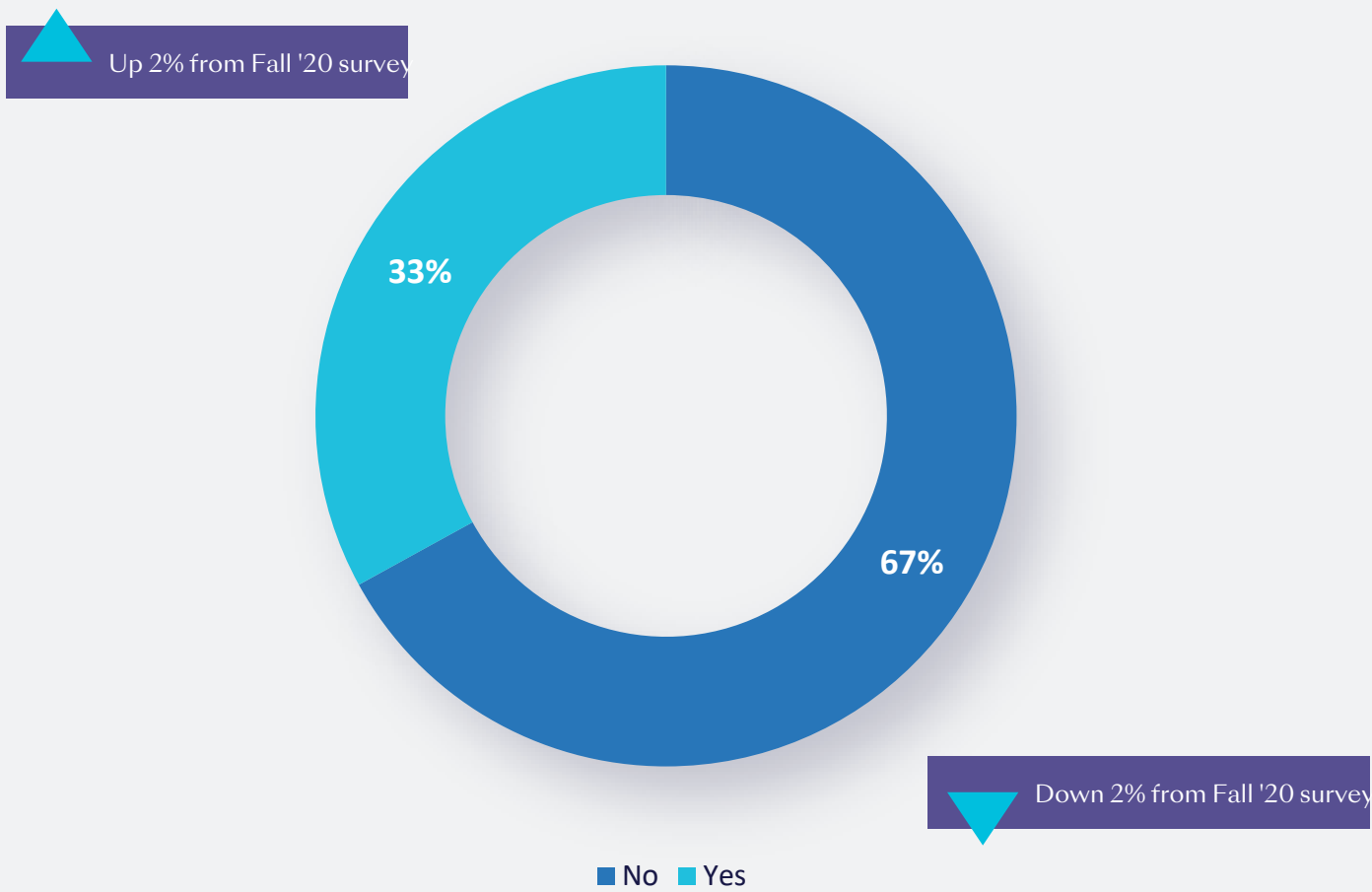
Hybrid is growing,
yet adoption still in
early stage



Hybrid adoption remains early stage

Continuing increase in planning and/or execution for hybrid events

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

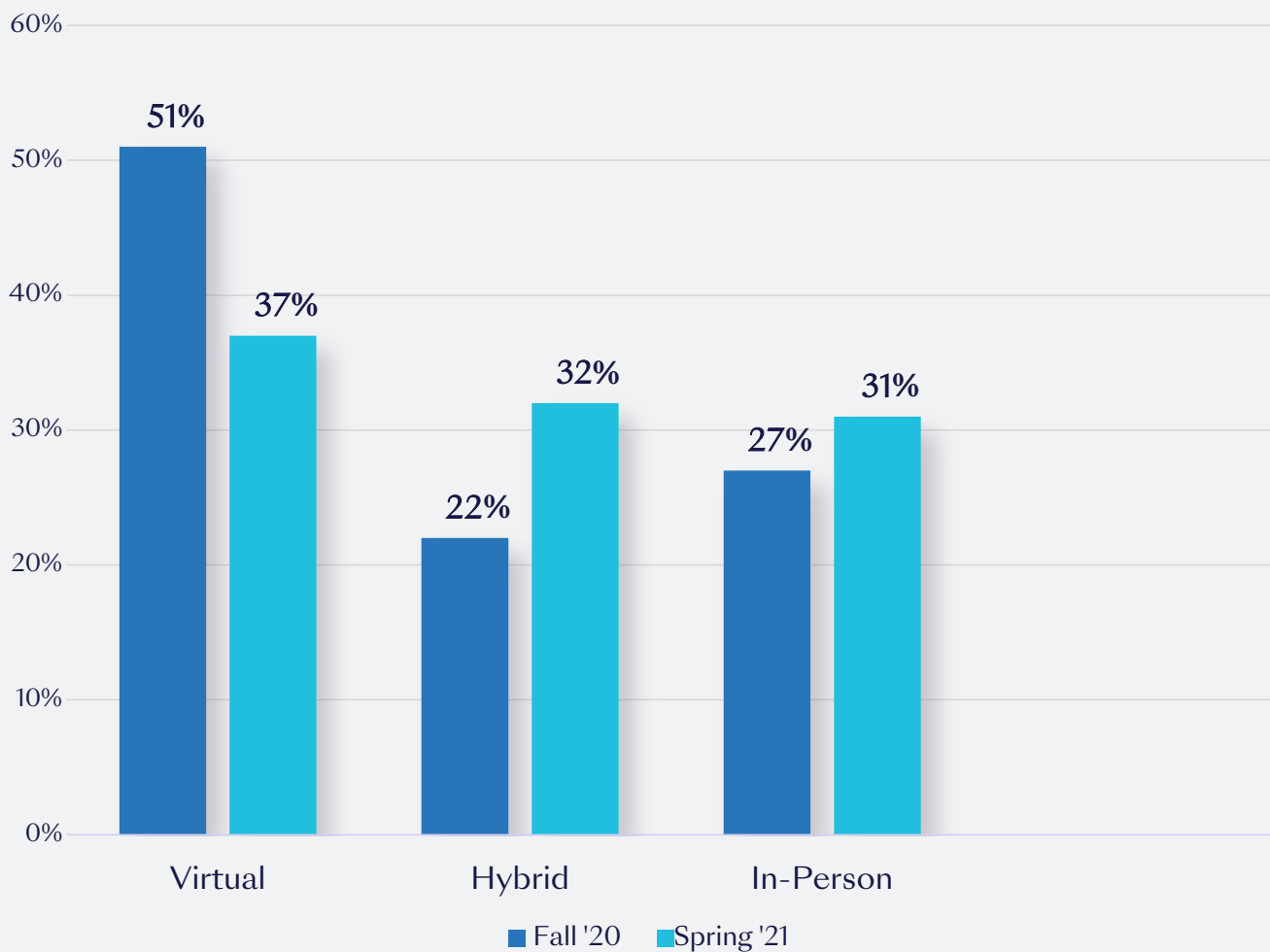




Event mix shifting to hybrid and in-person

Planning for hybrid and in-person increasing in 2021

Q – In 2021, what delivery format do you expect your events to take?

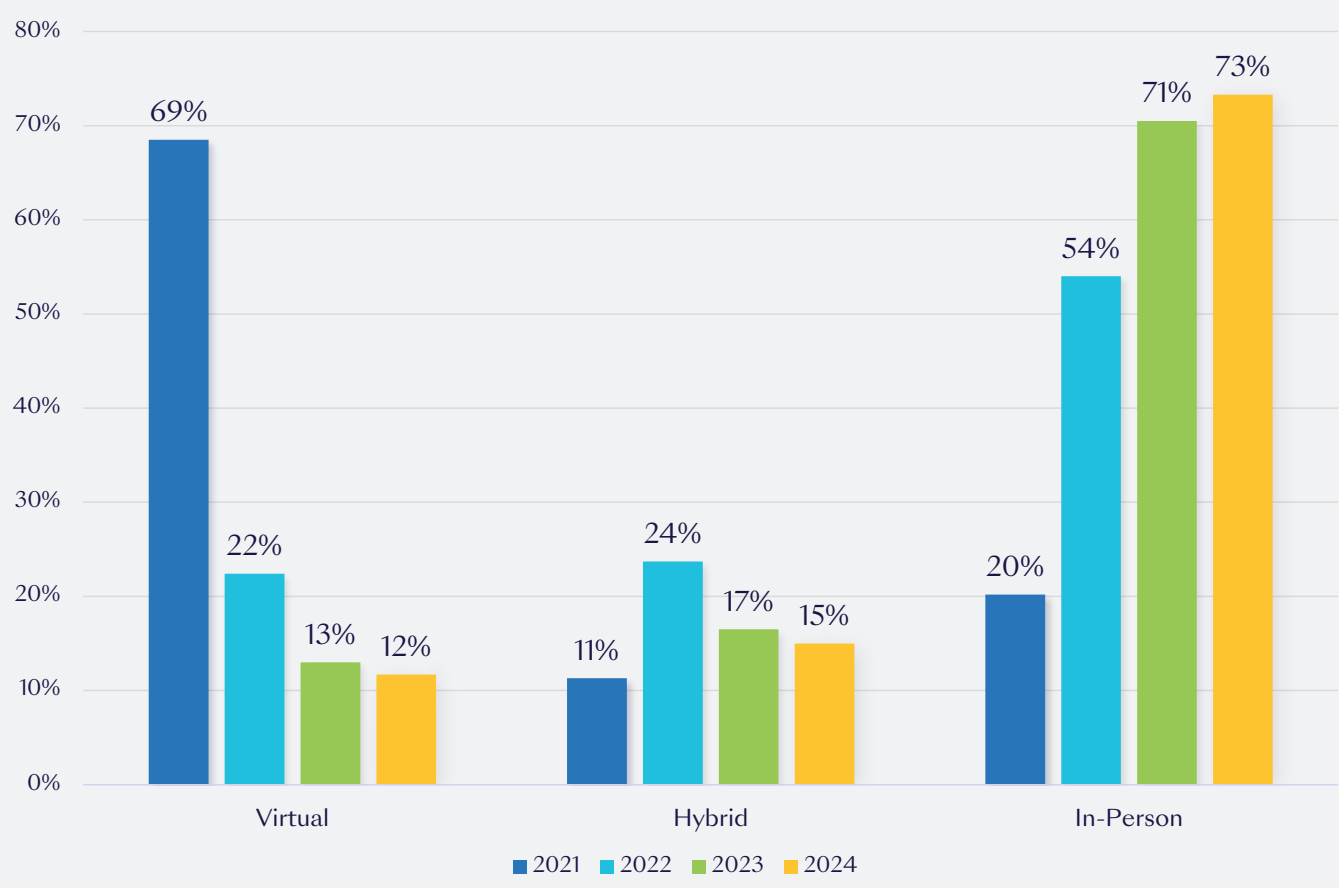




Demand for hybrid events will increase short-term

Planners report preference for return to in-person

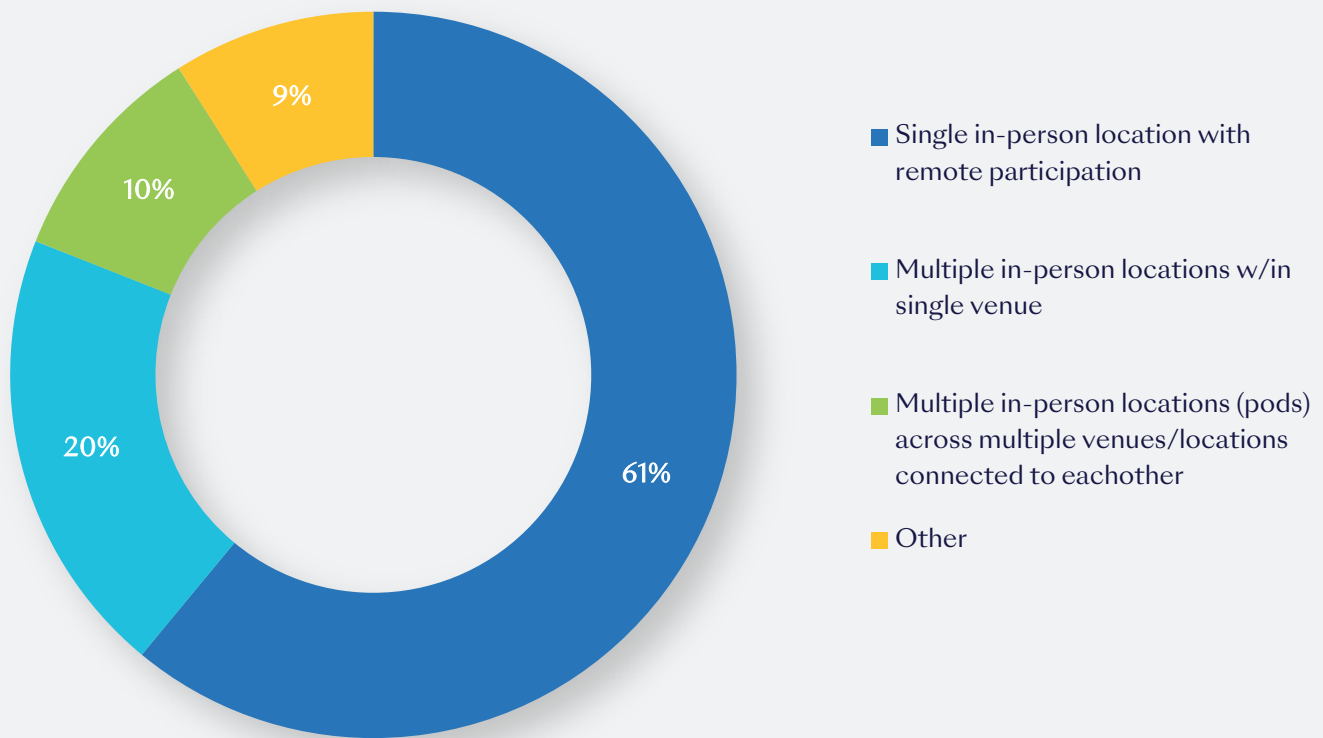
Q – For future years, please weight your expected % spend by meeting type?



Single location remains top format

Planners still evaluating options

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

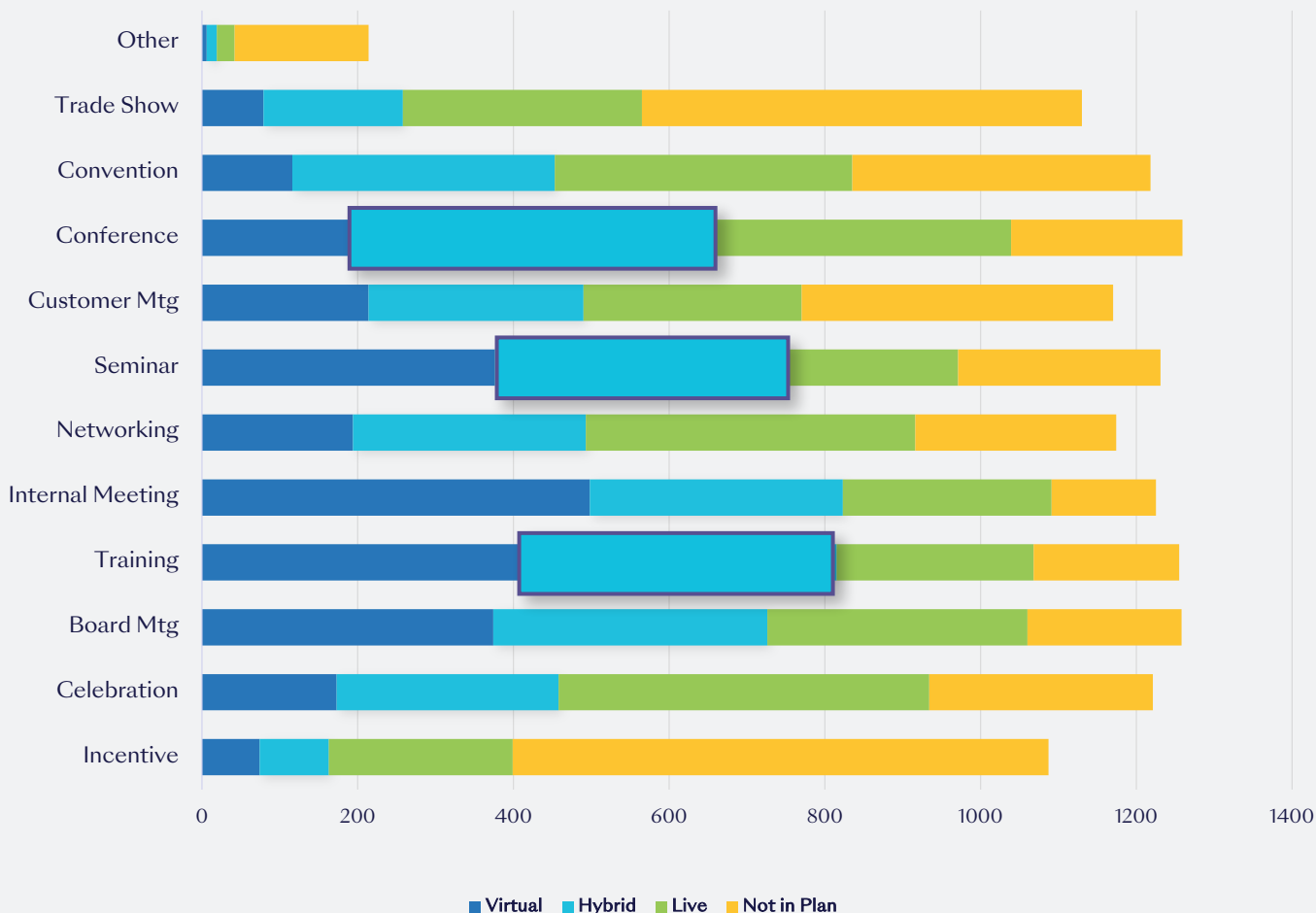




Conferences/training/seminars top hybrid choices

Trade shows have lowest hybrid intent beside incentive events

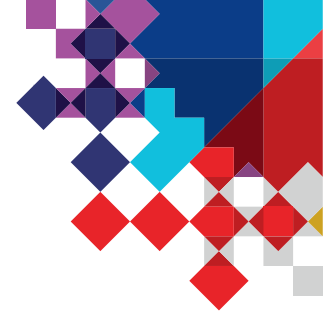
Q – What types of events would you prioritize for each format?





Key finding 3

Planner challenges
with hybrid format
are shifting



Hybrid challenges shifting

Increased concerns about attendee engagement, planning complexity and cost

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	Change
Willingness of participants to attend in-person events	61%	43%	-18%
Maintaining safety protocols with in-person participants (e.g. distancing)	52%	38%	-14%
Effectively engaging both in-person and remote participants	25%	32%	7%
Planning for two separate experiences (e.g. in-person, virtual)	14%	28%	14%
Increased technology costs to enable remote participants	21%	27%	6%
Increased venue costs to enable safety protocols (e.g. larger meeting spaces)	11%	14%	3%
Lack of knowledge of how to plan a hybrid event (e.g. technology)	7%	11%	4%



Key finding 4

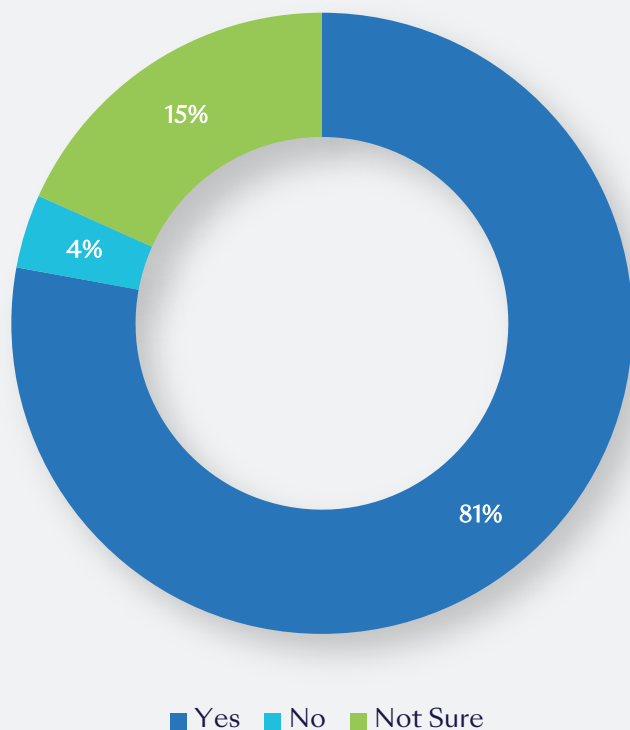
Most planners agree
that vaccine roll-out
will drive recovery

Impact of vaccine and return to pre-COVID event spending



Planner confidence is increasing with vaccine roll-out

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



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

Key Themes from Planners

- > Full vaccine distribution
- > Mask mandates lifted
- > Regular travel opens
- > Travel budget availability
- > Large conferences in-person
- > Full capacity sporting events



Other resources

- > Hybrid+ Events Handbook
- > Hybrid+ Events Checklist
- > Hybrid+ Internet Connectivity Checklist



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EVENTS THAT TRANSFORM

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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