

KONGRES MAGAZINE'S COVID-19 SURVEYS

The most comprehensive research on the
impacts of COVID-19 on the meetings industry

THIS FILE INCLUDES INFOGRAPHICS FROM THE FOLLOWING SURVEYS:

1. A GENERAL SURVEY ON COVID-19	2
2. POST-CORONAVIRUS MARKETING STRATEGIES	5
3. COVID-19 EVENT RESTRICTIONS	8
4. DESTINATIONS AFTER COVID-19	11
5. L-DAY (LIVE EVENT DAY)	15
6. ONLINE VS LIVE	18
7. EVENT PLANNING AFTER COVID-19	24
8. EVENT VENUES DURING AND AFTER COVID-19	29

The surveys were carried out from March to October 2020

A SURVEY ON COVID-19 BY KONGRES MAGAZINE

Survey dates: March 15 - April 2, 2020

The editorial board of Kongres Magazine wanted to attain first-hand information from members of the meetings industry and hear their thoughts on the COVID-19 situation. A survey was sent out and Kongres Magazine managed to reach 522 respondents from 35 countries. The survey provides interesting insight into the thought-process of meeting planners when it comes to critical, unpredictable changes like a global virus outbreak in our industry. All data in the survey was gathered by Kongres Magazine according to GDPR regulations and their privacy policy.

NUMBER OF ANSWERS

522 respondents from 35 countries

EVENT CANCELLATIONS

On average, every meeting planner has had to cancel **7,86** events and postpone **9,59**.

- 60.9 %** believe we should **delay** all meetings for the next few months.
- 18.8 %** believe we should **cancel** all meetings for the next few months.
- 11.7 %** believe it should be handled on a case-by-case basis.
- 4.7 %** believe we should continue to hold meetings in areas that are not significantly affected.

WORK

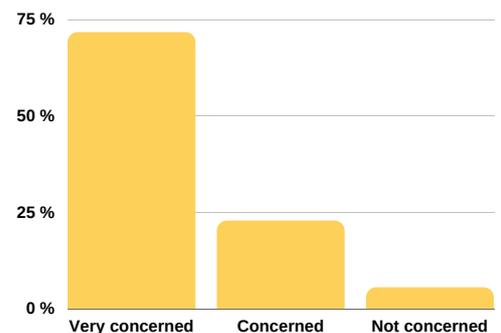
- 84.5 %** said they will **continue to work from home** during office closure.
- 10.1 %** said that **work is halted**, but compensation is provided.
- 5.4 %** said that **work and compensation are both halted**.

How is work handled when an employee is quarantined or in self-imposed isolation (but not infected)?

- Employee works remotely **74.4 %**
- Employee uses sick leave **20.2 %**
- Employee uses personal days **1.6 %**

How concerned are you about COVID-19 affecting your business?

71.7 % of meeting planners are **VERY CONCERNED** and only **5.5 %** are **NOT CONCERNED** by the situation.



What do you think are your chances of getting sick with Coronavirus?

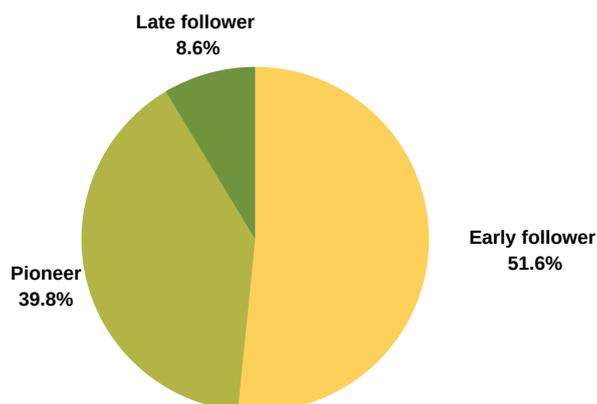
When asked about the chances of getting sick with Coronavirus, **55%** of meeting planners said their chances of getting sick are **MEDIUM**, **29.9 %** of meeting planners think they are **LOW**, while only **15.1%** think they are **HIGH**.

TRAVEL

- 70.3 %** have **banned all travel** globally for their employees
- 10.9 %** have **banned only nonessential travel** for their employees
- 10.2 %** have **banned all nonessential travel to all affected locations**
- 4.7 %** have **not banned travel**, but are monitoring the situation

A SURVEY ON COVID-19 BY KONGRES MAGAZINE

How would you describe your company's reaction to the outbreak?



- **Early follower** – actively collects external information and reacts promptly
- **Pioneer** – acts proactively and makes timely decisions to tackle the matter
- **Late follower** – relies heavily on external information
- **Lone ranger** – imposes very little change

Can you estimate how much your profits will decrease in 2020 because of COVID-19?

- **40% decrease in profits** – 31,1 %
- **60% decrease in profits** – 25.4 %
- **80% decrease in profits** – 22.1 %
- **20% decrease in profits** – 17.2 %
- **100% decrease in profits** – 4.1 %

The fact that most meeting planners think their profits in 2020 will suffer greatly because of COVID-19 are very alarming.

In these hard times, we need:

- **Information** - 35.52 %
- **Ideas** - 26.64 %
- **Inspiration** - 22.39 %
- **Insights** - 15.44 %

BIGGEST RISKS

- **Liquidity Risk** - 37.50 %
- **Interest Rate Risk** - 14.17 %
- **Purchasing Power Risk** - 14.17 %
- **Tax Risk** - 11.25 %
- **Political Risk** - 10,42%
- **Legislative Risk** - 8,75%

Other (3,75%)

- No income
- Bankruptcy
- Losing members
- Loss of future work
- Laying off and subsequently losing staff
- Global economic breakdown risk
- Generally all PEST Factors

ALTERNATIVE EVENT FORMATS

- Webinars
- Video conferences
- Hybrid events
- Small team events
- Live Streaming

MOST TRUSTED SOURCE OF INFORMATION

- **The local or national government** - 40.3 %
- **Health professionals** - 34.1 %
- **News** - 17.1 %
- **Other** - 3.9 %
- **Social Media** - 3.1 %
- **Friends, family** - 1.6 %
- Not Donald Trump
- Scientific and governmental sources
- Specialised websites

THOUGHTS ON THE COVID-19 SITUATION

“Many companies will disappear, especially small ones like ours in Spain. We will have to rethink our business and how to continue ... Thanks to Kongres Magazine for this survey and the possibility of expressing ourselves in the face of such a difficult situation. We will read your conclusions”

“A disaster but health is more important!”

“We need to help each other... COVID-19 is a sickness, not the end of the world”

“It will be a big challenge not only for organisers, associations and meeting planners but also for the meeting industry suppliers. Some companies might not survive this if not supported well by their governments. Still it is a chance for new ideas, new development, strategies and a more sustainable meeting culture in the future.”

“It is an unplanned hardship that has come really hard at our industry. One can never be prepared for such a situation, but I guess people will learn from this and start inculcating clauses to cover for such eventualities while contracting.”

“I think we should use this time of less work to rethink, reorganise and prepare ourselves to be more than ready when the market and travelling industry open again. Maybe reinvent ourselves.”

“I think, especially in Italy and Lombardy where I live, that the meeting industry will come slowly to a normal situation not before the end of 2020. COVID-19 has been a tragedy for Italy’s economy but we are strong and will survive.”

It will change our industry dramatically after. Darwin will come to mind again, this will be the survival of the fittest and smartest. It looks like our business plan for 2025 will be happening sooner than we thought...”

“Many companies will be experiencing difficult times in terms of cash flow and tax payments. It depends how long it will take ... many jobs will be eliminated unfortunately. Governments must act rapidly to give financial support to the MICE and travel industry”

“If the crisis continues for more than 3 months it will ruin many businesses. Many companies will go under. We still don’t know how the market will react after the pandemic. How long the economic effect will last. Support from the governments through a package of financial measures and business solidarity is crucial in these moments.”

“Fear is a bad adviser”

KONGRES MAGAZINE'S RESEARCH ON POST-CORONAVIRUS MARKETING STRATEGIES

Survey dates: March 31 - May 18, 2020

Restarting marketing activities after the coronavirus crisis is one of the burning matters that members of the meetings industry face right now. Kongres Magazine wanted to analyse their post-pandemic marketing plans and sales strategies. This is the second survey in a series of research articles that tackle the most interesting trends in our industry. 361 meeting planners completed our survey. All data in the survey was gathered by Kongres Magazine according to GDPR regulations and their privacy policy.

NUMBER OF ANSWERS:
361 respondents

TOP PRIORITIES

- 34.5 %** – Carrying out postponed events
- 25.3 %** – Improving engagement with clients
- 13.8 %** – Reaching a relevant audience
- 11.5 %** – Revenue increase
- 8.0 %** – Carrying out cancelled events
- 4.6 %** – Increasing the number of events
- 2.3 %** – Increase in sales

COMMUNICATION CHANNELS

The most used offline/online communication channels during this crisis

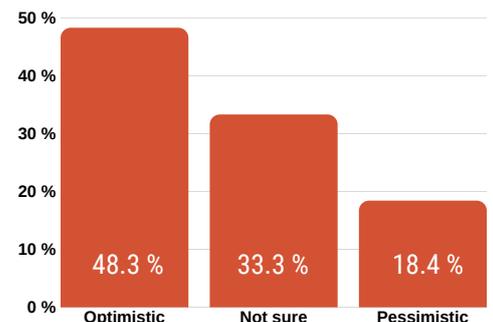
-  Social Media (Facebook, LinkedIn, Instagram)
-  Website and web portal
-  Direct Marketing (newsletter, e-mail)
-  Online events (webinars)



Sales calls will become the most important lead generation tool after the crisis.

How confident are you in the meetings industry recovering after the COVID-19 crisis?

The answers to this question showed us just how uncertain the current situation is.



Do you expect your marketing budget to change in 2020?

67.8 % expect their marketing budget to decrease, many of them have already ruled it out completely, as they believe it presents an unnecessary expense right now. **23%** think it will stay the same and only **8%** believe it will increase.

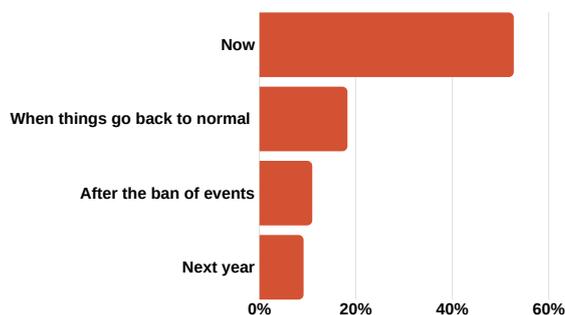


In which of the following digital distribution channels will you INVEST MORE after the crisis?

- 18.43 %** – Website
- 18.09 %** – Social (Facebook, LinkedIn)
- 11.26 %** – E-mail
- 8.87 %** – Online events (webinars)
- 8.53 %** – SEO (Organic Search)
- 7.85 %** – Social Communities
- 7.17 %** – Video Advertising

KONGRES MAGAZINE'S RESEARCH ON POST-CORONAVIRUS MARKETING STRATEGIES

When do you think is the best time to start marketing your product again?



SOURCES OF INFORMATION

The most useful sources of information when it comes to finding information on event destinations or event venues:

-  Direct contacts
-  Friends and colleagues
-  Convention Bureaus
-  Google

What is the first thing you will do when the crisis is over?

- 41.0 % – Visit friends and relatives
- 16.3 % – Have a drink with friends
- 12.3 % – Enjoy a nice meal in a restaurant
- 10.5 % – Travel somewhere/take a vacation
- 5.8 % – Visit a barber and hair dresser
- 3.5 % – Stay in self-isolation at home
- 1.0 % – Attend a concert
- 1.0 % – Go to the movies

How satisfied are you with international MICE associations as a marketing tool during the crisis?

- 53.5 % - Neutral
- 20.9 % - Somewhat Satisfied
- 11.6 % - Somewhat Dissatisfied
- 8.1 % - Very Dissatisfied
- 5.8 % - Totally Satisfied

MAJOR CHALLENGES AFTER THE CRISIS

1. Distrust and fear of traveling abroad

The burning question... is it safe to travel?

2. Security problems with transportation

Getting people to travel again

3. Security problems during events with many people

Activate the trust in meeting

4. Cleanliness and sanitation of hotels and restaurants

Safety and hygiene of the venues

5. Overload of information

Overflow/excess of advertising coming from destinations/providers

6. New event formats

Cheaper but more flexible events

7. Low budgets

Price dropping – how to get on the same level as before the crisis

8. Market segmentation

Not all markets will recover at the same time/in the same way

WORD CLOUD



WHAT TYPE OF MARKETING WILL PRODUCE THE GREATEST ROI AFTER THE CRISIS?

- ” Online solutions where you can reach the right target group make sense. Example: if you are an international MICE supplier and you want new business with buyers from Germany you need to have: the right target group and digital awareness for your brand in line with the wishes and the needs of the German target group.
- ” Direct communication with clients, relevant online & social media presence.
- ” Regular newsletters sent to clients and agencies, sales calls and personal connections (personal contacts, lobbying).
- ” Marketing directed at current partners and clients, communications that improve reputation and highlight trust.
- ” This will not change and everyone will continue to use those digital marketing channels (especially social media, media service providers, web in general. Also it's affordable.

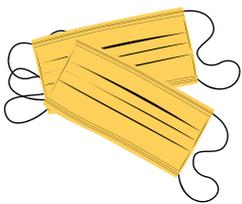
KONGRES MAGAZINE'S RESEARCH ON COVID-19 EVENT RESTRICTIONS

Survey dates: April 24 - May 7, 2020

The third survey in a series of research articles by Kongres Magazine delves into restrictions connected to organising events and their gradual removal. We wanted to know what event organisers, venues, congress centres and hotels think about the measures that have brought our industry to a complete halt. The sooner the liberalisation of socialising at certain types of events happens, the sooner restrictions will get removed.

NUMBER OF ANSWERS:

509 respondents



Will participants be wearing masks at events for the foreseeable future?

The way events are organised will change completely in the future. Wearing masks at events is something that we never thought we would be discussing. Most respondents agree that participants will be wearing masks at events in the future.

- 46.7 % - YES
- 31.5 % - I am not sure
- 13.0 % - NO

In addition to the attendees, 64.1 % of respondents believe that employees will also have to wear masks at future events.



Will professional medical staff need to be present at events?

- 45.1 % - NO
- 26.4 % - YES
- 18.7 % - I am not sure
- Depends on the size of the event
- Yes, to measure temperature
- Only for big events
- Depends on the format & structure of each event
- Yes, always
- A well defined protocol is enough

When do you plan on carrying out your first live event?

- Autumn 2020 - 52.7 %
- Summer 2020 - 12.1 %
- Winter 2021 - 12.1 %

When do you think European governments will allow events for up to 100 people?

- September 2020 - 34.1 %
- 2021 - 18.7 %
- October 2020 - 14.3 %
- August 2020 - 9.9 %
- July 2020 - 8.8 %
- October 2020 - 7.7 %
- June 2020 - 5.5 %
- December 2020 - 1.1 %

NECESSARY MEASURES



The vast majority of respondents agree that **disinfection of conference halls** and handing out **hand sanitisers** to participants are the most necessary measures.

- Disinfection of conference halls - 4.5
- Handing out hand sanitisers to participants - 3.6
- Checking body temperature at the entrance - 2.9
- Providing masks - 2.6
- Medical staff for controlling medical procedures - 1.3

KONGRES MAGAZINE'S RESEARCH ON COVID-19 EVENT RESTRICTIONS

THE MOST IMPORTANT TECH

We are in for big changes when it comes to event technology. Sooner or later, we will have to go 100% digital and respondents agree that **fast internet connectivity** will be the most important factor of future events.



Good internet connectivity 4.63



Video-conferencing systems with live streaming 4.13



Professional multimedia technicians 4.04



Interactive conference systems (e.g. Slido) 3.93

HIGHEST RISK

The respondents ranked the **ABOVE 70** age bracket as the one faced with the highest risk.



How will you exclude high-risk individuals from your participant list at future events?

- They won't be denied access **41.1 %**
- By measuring body temperature **25.6 %**
- Subjective judgement **15.6 %**
- Other **14.4 %**
- They will be denied application **12.2 %**
- With physical control on entry **10.0 %**
- We shall inform them about the risk when they register
- Individuals need to be responsible and not attend
- Own personal responsibility
- No discrimination!
- Following government rules
- Would need to carry a Health Passport
- Pre-conference communication
- Medical declaration requirement

How will you handle refunds when an attendee has a confirmed case of COVID-19?

- **46.1 %** - The entire fee will be refunded
- **44.9 %** - Basic refund conditions apply
- **9.0 %** - The attendee will not get a refund



The optimal length of future events:

1-2 DAYS

Will everyone working in the meetings industry have to be tested for COVID-19 in the future?

- **38.5 %** - YES
- **33.0 %** - NO
- **28.6 %** - I am not sure

When do you think the nightmare by the name of COVID-19 will end?

- **31.5 %** - Spring 2021
- **21.2 %** - Summer 2021
- **15.7 %** - Autumn 2020
- **13.5 %** - Winter 2020/21
- **6.7 %** - Summer 2020
- **3.4 %** - Never



OPINION AND ADVICE

What measures would you implement to reduce crowding in public spaces?

- By working with the venue to satisfy the requirements dictated by the local, state, & country norms as well as other common sense input.
- Using digital resources for registration management and access validation (interaction with smartphones, for example)
- Try to do dinners at open air venues as much as possible. Or organize seating like 2 and 2 at one table in case of couples which is mostly the case with incentives (guests are invited to bring their spouse to an incentive).
- Special signs on the floor, showing people where to go, handling possible crowding with extra personnel
- Line control, reduced capacity, bigger exhibition spaces, social distance seating, more employees for faster processes

What can meeting planners do for the safety of their participants?

- Education and assurance of what measures are taken.
- Take more space than needed for the number of participants so there is greater distance. Make disinfecting wipes, hand sanitizer and hand washing stations available as appropriate. Possibly survey attendees pre-event regarding COVID-19 exposure, etc. Pre-event communication with attendees letting them know what precautions the meeting or event has undertaken for their safety and restating they should not attend if they have a fever or do not feel well.
- They need to have safety and security assessment plans/procedures, which are in compliance with local Government regulations: **Space the meeting halls, disinfect all venues and rooms and public areas as often as possible and put sanitizers wherever possible.**
- Ensure health security of the venues, technical and support staff for the event, ensure safety distance between participants and provide support and monitoring services. Health security will be imperative.
- First of all let the guests be checked before taking the flight, or let them be in self-quarantine at least 7 days prior to travelling to avoid being stopped at their airport before flying to Croatia.
- Cooperate and coordinate with the providers (venues, catering, hotels) to make sure they have implemented the security measures. Control by checking in at the event entrance, temperature measures, distribution of masks and hand disinfection sprays.
- Have virtual conferences until it is safe to have physical ones again.



Survey dates: May 8 - June 1, 2020

KONGRES MAGAZINE'S RESEARCH ON DESTINATIONS AFTER COVID-19

What kind of destinations will attract meeting planners after the COVID-19 crisis? What will be the deciding factor for meeting planners choosing an event venue, where will they find information, what kind of marketing will prevail and which trends will shape our industry in the future? These are some of the questions that we answered in the 4th instalment of Kongres Magazine's coronavirus surveys. Together with the information collected from previous and ongoing surveys, we will be publishing an in-depth guide to exiting the coronavirus crisis.

NUMBER OF ANSWERS:

645 respondents

Will you change the type of destinations you choose to organise events after the coronavirus situation is resolved?



- NO - **35,8 %**
- YES - **27,4 %**
- I am not sure - **27,4 %**

- Not changing the destination but carefully considering the format and venue
- Will much depend on my clients sentiment and on their requests
- Probably opt for regional meetings over international and transatlantic travel

Which of the following sources do you use to find information on destinations for your events?

- Convention Bureaus / Tourist organizations - **16,62 %**
- Fam trips to destinations - **13,90 %**
- Meeting industry trade shows - **13,35 %**
- Friends and colleagues - **12,26 %**
- Google - **10,63 %**
- Local meeting planners - **10,08 %**
- Social media - **8,99 %**
- Meeting industry magazines - **8,17 %**
- Venue finding agencies - **3,81 %**

When will you feel comfortable travelling again for meetings and events?

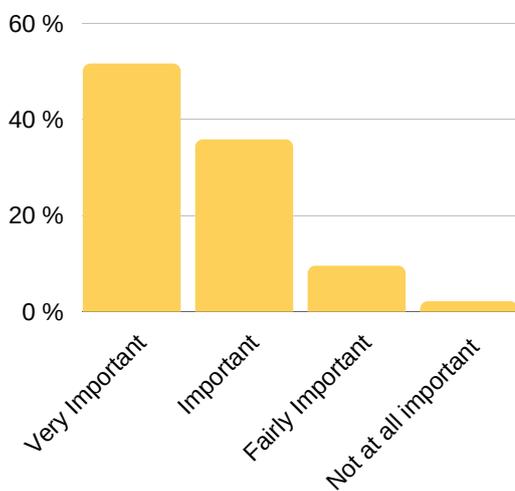
- July - September 2020 - **31,6 %**
- October - December 2020 - **31,6 %**
- January - March 2020 - **16,8 %**
- After March 2021 - **11,6 %**
- Other - **8,4 %**

Please rank the most important criteria when choosing a destination for your next event after COVID 19?

- General and health safety - **9.9**
 - Comfort and accessibility - **9.4**
 - Value for money - **8.6**
 - Climate - **7.1**
 - Consideration of sustainable principles - **6.6**
 - Professionalism of local meetings industry - **6.2**
 - Attractive natural or cultural location - **6.0**
 - Less crowded destination - **5.7**
 - Economic stability - **5.6**
 - Image of the destination - **4.8**
 - Visa requirements - **4.1**
 - Entertainment and nightlife - **4.0**
- 

KONGRES MAGAZINE'S RESEARCH ON DESTINATIONS AFTER COVID-19

How important will the **destination experience** be for business events in the future?



Which of the following activities will you cut as a meeting planner over the next months?

- **International trade shows** - 19,66 %
- **Fam trips** - 15,81%
- **Industry Conferences** - 14,53 %
- Domestic trade shows - 12,82 %
- Client events - 11,97 %
- Site visits - 8,97 %
- None - 7,69 %
- Association memberships - 4,70 %
- Partnerships - 2,99 %

Do you prefer virtual fam trips over destination fam trips?

- NO - 82,3 %
- YES - 11,5 %
- Other - 6,3 %



- No, however it is better than nothing
- It depends if you can do it safer
- I used to prefer in person, but that all has changed
- Not usually, but we have no choice at the moment

What megatrends will influence and challenge the meetings and events industry in the future?

- **24,63 %** - Technology
- **22,43 %** - Sustainability
- **15,81 %** - Mobility
- **9,93 %** - Rise of the individual
- **7,72 %** - Demographics
- **7,72 %** - Sharing Economy
- **7,35 %** - Circular Economy
- **2,57 %** - Urbanisation
- **1,84 %** - Feminisation



The use of social media for choosing a destination is expected to?

- **56,3 %** - Increase
- **43,8 %** - Stay the same
- **0,0 %** - Decrease



KONGRES MAGAZINE'S RESEARCH ON DESTINATIONS AFTER COVID-19

**In your dealings with
DESTINATIONS (CVB, DMC
etc.) what annoys you most?**

PROFESSIONALISM

- Lack of professionalism
- No direct answers to questions
- Slow responses to our requests
- Lack of cooperation among local providers
- Wrong answers, promises never hold
- Lack of transparency; price over quality

CONTENT

- Generic unpersonalised information
- Not understanding briefs properly
- Less creativity within programme
- The information they offer seems generic, typical
- I am always looking for the unique, limited access, personally connected experiences and it would be nice to work with a CVB that might offer some personalised connections.

RFP'S

- Answers not clear and complete
- Sometimes their answers are too slow
- Lack of price clarity
- Secret-hidden charges
- The majority do not have a lot of influence on the local supplier network, e.g. cannot help with housing contract

OTHER

- Arrogance of the locals and close minded associates
- Forcing to choose a location which is not suitable for us
- When they only present their paid members

**In your dealings with
DESTINATIONS (CVB, DMC etc.)
what is the most positive?**

TAILOR-MADE APPROACH

- Personal tailor-made client approach
- Receiving answers and suggestions
- Saves time on destination search
- New ideas that I didn't think of
- Quick responses with targeted info
- Partnership approach

KNOW-HOW

- The knowledge of the area
- Local knowledge
- Knowledge and insight
- Getting insight from the CVB is a critical component
- Unexpected surprises on locations, hidden gems
- Suggestions and deep knowledge of the territory
- Local market knowledge, insider tips

TRUST

- Personalised guidelines
- Trustful source of information
- Feeling we are in the same boat
- Dealing as partners
- Sharing results and responsibilities
- Reliability, fulfilled expectations and contracts

EXPERIENCE

- Creativity
- Optimism
- Passion



KONGRES MAGAZINE'S RESEARCH ON DESTINATIONS AFTER COVID-19

When travel restrictions are lifted, which destinations are at the top of your list?

TOP 10 FUTURE COUNTRIES



THE L-DAY CAMPAIGN

Survey dates: May 11 - June 6, 2020

We are certain that many colleagues wake up with the same question; when will I be able to organise events? To instil some hope and provide information from around the world, we launched the L-DAY campaign. L-DAY or LIVE EVENT DAY is the day that we will be able to organise events without limitations. In order to provide the most objective answer to the afore mentioned question, we asked international experts, influencers, associations and Kongres Magazine readers to answer three simple questions:

1. When will your country allow events for up to 100 people?

- 20,0 % - JUNE 2020
- 17,2 % - JULY 2020
- 17,1 % - MAY 2020
- 11,5 % - SEPTEMBER 2020
- 8,6 % - AUGUST 2020
- 2,9 % - DECEMBER 2020
- 2,9 % - JANUARY 2020

3. When are you planning your first live event?

- 22,8 % - SEPTEMBER 2020
- 14,3 % - JULY 2020
- 8,6 % - NOVEMBER 2020
- 8,6 % - JANUARY 2021
- 8,6 % - APRIL 2021
- 5,7 % - JUNE 2020
- 5,7 % - MARCH 2021
- 2,9 % - OCTOBER 2020
- 2,9 % - DECEMBER 2020
- 2,9 % - FEBRUARY 2021

2. When will your country allow events without restrictions?

- 34,3 % - Don't know and not sure yet
- 20,0 % - January 2021
- 17,1 % - Beginning of September 2020
- 8,6 % - April 2020
- 5,7 % - Beginning of July 2020
- 5,7 % - March 2021
- 2,9 % - End of August 2020
- 2,9 % - Beginning of October 2020
- 2,9 % - Beginning of November 2020



L-DAY
LIVE EVENT DAY

SIGURJÓNA SVERRISDÓTTIR
Meet in Reykjavík
ICELAND

L-DAY=
Unknown



L-DAY
LIVE EVENT DAY

FRANTISEK FABIAN
Bratislava, Slovakia

L-DAY=
1 September 2020



L-DAY
LIVE EVENT DAY

ROMAN MUŠKA
Prague Convention Bureau
CZECH REPUBLIC

L-DAY=
June 22



L-DAY
LIVE EVENT DAY

KADRI KARU
Estonian Convention Bureau
ESTONIA

L-DAY=
Early Autumn



L-DAY
LIVE EVENT DAY

IVO J. FRANSCHITZ
ENITED Business Events
AUSTRIA

L-DAY=
Q4 of 2020



L-DAY
LIVE EVENT DAY

NEIL BROWNLEE
Visit Scotland
SCOTLAND

L-DAY=
September



L-DAY
LIVE EVENT DAY

MIRO ANTIC
M2Communications
SERBIA

L-DAY=
Q4 of 2020



L-DAY
LIVE EVENT DAY

KREŠIMIR DOMINIĆ
Komunikacijski laboratorij
CROATIA

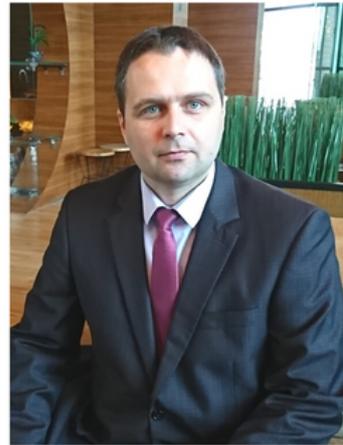
L-DAY=
No information yet



L-DAY
LIVE EVENT DAY

CATALIN MOGOSEANU
CLICK2TRAVEL DMC
ROMANIA

L-DAY=
1 August 2020



L-DAY
LIVE EVENT DAY

IVAYLO KOZUHAROV
Hotel Experts
BULGARIA

L-DAY=
August 2020



L-DAY
LIVE EVENT DAY

BREDA PEČOVNIK
Cankarjev Dom

L-DAY=
September 2020.



L-DAY
LIVE EVENT DAY

GORAZD ČAD
Toleranca Marketing

L-DAY=
August 2020.

KONGRES
NEW EUROPE MEETINGS INDUSTRY MAGAZINE

Ever since the COVID-19 pandemic started, Kongres Magazine has been making an active effort to report about the latest developments with top quality content, helping the industry wade through the crisis. Our work was awarded by the readers, who keep returning to the web portal every day.

Thank you for staying with us, even in the most challenging times!

Your Kongres Magazine Editorial Board

**POWER TO
THE
MEETINGS**



Survey dates: June 10 - June 24, 2020

Can Online Events Really Replace Face-to-Face Meetings?

The coronavirus pandemic exposed many weaknesses and highlighted unexploited opportunities in the meetings industry. It seems that we finally found the solution; online events. These kinds of events existed before the global pandemic, but we want to know - Are live events really a thing of the past? All events have their upsides and downsides. In the sixth and final survey, we wanted to find out what you think about the future of events.

NUMBER OF ANSWERS:

693 respondents

PRIMARY BUSINESS OF RESPONDENTS:

- 30,4 % - Event agency
- 23,5 % - Agency (PCO, DMC)
- 13,7 % - Meeting planner
- 9,8 % - Destination Management Organisation
- 2,0 % - Venue

Other:

- AV service provider
- Communication Agency for MICE marketing
- Publishing
- Training organisation
- Association
- Local authority
- Event media

How many live events have you attended last year?

74,5 % attended between 0 - 25 events

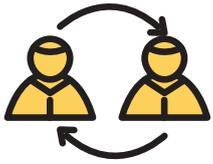
- 10 - 25 events - 25,5 %
- 5 - 10 events - 24,5 %
- 0 - 5 events - 24,5 %
- 25 - 50 events - 13,7 %
- 50 - 100 events - 7,8 %
- over 100 - 3,9 %

Have you ever attended an online meeting? If YES, what type?

- 63,4 % - Webinars
- 17,8 % - Virtual Conferences
- 3,0 % - Hybrid Events
- 2,0 % - Webcast
- 3,0 % - Virtual Trade Show
- 10,9 % - Other (please write)

In my work, I use the following tools on a regular basis:

-  99,0 % - E-mail
-  77,5 % - Video conferencing
-  60,8 % - Webinars
-  59,8 % - Online shared documents



Are you going to switch your live events to online after coronavirus?

- **65,7 %** - Only partly
- **28,4 %** - No
- **5,9 %** - Yes completely

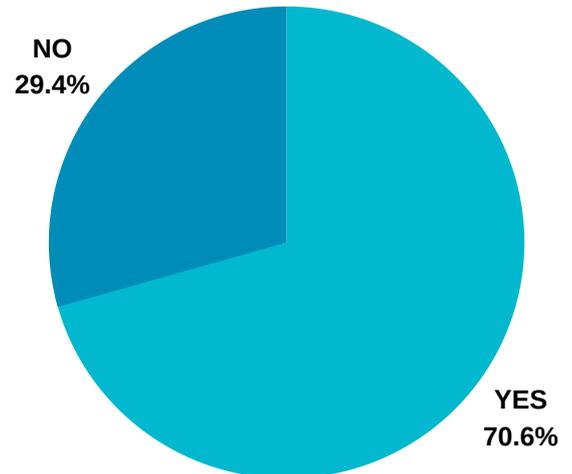
Do you see online events playing an important role in reaching a younger audience?

- **49,0 %** - Yes
- **38,2 %** - Not sure
- **12,7 %** - No

How would you monetize online events?

- **62,7 %** - Registration fee is lower
- **38,2 %** - Sponsorship
- **35,3 %** - Through a virtual exhibition hall
- **21,6 %** - It would not be revenue-generating
- **12,7 %** - Registration fee stays the same
- **2,9 %** - Other
- Hybrid model, revenue generator
- Fees according to the extent of the virtual venue
- Still working on it

Did attending an online event make you want to attend a live event?



How do you keep attendees of online events engaged?

- **41,2 %** - Great content
- **37,3 %** - Audience engagement
- **10,8 %** - Gamification
- **10,8 %** - Other
- Mix of one and two with a touch of 3
- Gamification is the driving force to maintain interest
- Provide excellent content and high quality sound and video
- It has to be the joining of several different aspects.

LIVE

KONGRES
NEW EUROPE MEETINGS INDUSTRY MAGAZINE

VS



ONLINE



At what time of day should online events be held?

- **45,1 %** - 10 a.m. - noon
- **20,6 %** - 3 p.m. - 5 p.m.
- **16,7 %** - 1 p.m. - 3 p.m.
- **8,8 %** - 5 p.m. - 7 p.m.
- **6,9 %** - 7 a.m. - 10 a.m.
- **2,0 %** - noon - 1 p.m.

Which AI tools can help improve online events?

- **53,9 %** - Meeting minutes summarisation
- **34,3 %** - Expert suggestion
- **34,3 %** - Opinion mining
- **30,4 %** - Sentiment analysis
- **28,4 %** - Text generation
- **23,5 %** - Voice recognition
- **13,7 %** - Gesture recognition

What skills should meeting planners poses after COVID-19?

- **72,5 %** - Flexibility
- **64,7 %** - Online marketing
- **56,9 %** - Event planning
- **56,9 %** - Organisational
- **52,0 %** - Customer services
- **47,1 %** - Digital-user interface
- **15,7 %** - HTML skills
- **6,9 %** - Other

OTHER

- Trust and solidarity
- Take care of interaction!
- Strong contract negotiation
- Problem solving skills
- Ability to explain tech in user-friendly terms

Why should we organise LIVE EVENTS?

Final mark for LIVE EVENTS: **4,02**

- 4,65** - To strengthen relationships
- 3,92** - To influence others
- 3,78** - To make important decisions
- 3,73** - To solve problems

Why should we organise ONLINE EVENTS?

Final mark for ONLINE EVENTS: **3,02**

- 3,15** - To influence others
- 3,03** - To make important decisions
- 3,19** - To solve problems
- 2,70** - To strengthen relationships



What makes **LIVE** EVENTS successful?

Face to Face meetings are essential. People engage more. Interact more, network more.

Networking and Face2Face communication

- Nothing is better than being face to face.
- Virtual events don't create the same engagement
- Being part of it and the experience of living it!
- No matter how good the platform is, it is very difficult to network
- Live engagement is key to building and strengthening relationships
- Strong psychological component when we share experiences with others

Connections & Relationship building

- Great people
- Genuine connections, nuanced reactions
- Emotions and relations
- Direct exchange of opinions, controlled focus
- The use of all our senses

Personal contact and overall experience

- Human presence
- Meeting people in person is the most important part of any business
- Building and maintaining relationships is possible
- Contact with people, live information exchange, smiles and hugs
- The overall experience: relevant content, attendees, good venue

Content

- Appealing content, reliable and relevant speakers
- Better management of time, themes and atmosphere
- Inspirational environment
- Opportunity to come across new things, new people

What makes **ONLINE** EVENTS successful?

Time saving, cost saving, people listen more carefully, making the exchanges more effective.

Sustainability

- Eco-responsibility re: flights/consumption
- Time and cost efficient for the participants
- No travelling, hotel rooms, or eating out
- Flexibility, sustainability
- More affordable, less time consuming
- Full recording immediately after

Problem solving

- Quick problem solving and sharing of ideas
- Stay in touch with your audience even in a crisis situation
- You can join from anywhere
- Easiness
- It's possible to record and watch the whole content again

Audience

- Broader audience and a much bigger reach
- Flexible timetable
- Often free of charge
- The ability to attend for folks who are not comfortable with travel but don't want to miss out on the opportunity

Costs

- Lower costs
- Virtual events are much cheaper
- Time and travel savings

LIVE

KONGRES
NEW EUROPE MEETINGS INDUSTRY MAGAZINE

VS



ONLINE

What makes **LIVE** EVENTS successful?

” The energy and excitement that happens when people come together can't be recreated through a computer screen. People want to experience a moment, an environment that is different than their usual surroundings - whether it's an event in a different destination or a chance to get out of their home/office - and live events offer this. Meeting people in person is, in my opinion, still the strongest way to develop relationships.

” The place, the environment, the service, ample space and facilities, easy to reach, low cost travel opportunities ... and the event itself, top level speakers and content, latest technology features and no issues with it. Of course your communication and promotion.. everything! No loose threads!

” The key to making Live events a success are Human Personal Interaction, networking, meeting key decision makers who are available only during these events. Post event gathering helps not only to socialize amongst fellow colleagues, but also gives an opportunity to know them on a personal level. These events give us a chance to know much about destinations, tourism boards, property owners. It also provides you a platform to meet fellow travel agents from all over the world.

What makes **ONLINE** EVENTS successful?

” Virtual events are not made to replace live events forever, but to complement them. I foresee that in the future there will be a purpose for both live and virtual events. Both will exist side by side. Budget, financial power and travel cost/restrictions may play an important role. I'm happy to chat about it.

” The transfer between the different presenters or panels should be done smoothly by a dynamic presenter who knows how.

” The only benefit I see is saving time and other resources (less people involved, there is no need for a bigger meeting venue ...)

” Virtual events, as a stand-alone format, can & will not satisfy the complexity of business events, as a marketing & communication tool. However, the virtual element will be an integral & necessary part in the future of business events.

” They can deliver a larger audience than a live event might. It's easier for people to attend as they don't have to make any effort other than sitting in front of their computer.

LIVE

KONGRES
NEW EUROPE MEETINGS INDUSTRY MAGAZINE

V S



ONLINE

How high is the possibility of face-to-face meetings and travel being replaced with online?

46,1 % - Low possibility
35,3 % - Medium possibility
18,6 % - High possibility

If you had voted in your company, what would you choose?

48,0 % - LIVE meetings
45,1 % - HYBRID meetings
6,9 % - ONLINE meetings

STATEMENT: The use and related marketing strategies of ONLINE meetings in our organisation, positively contributes to our goals.

64,7 % - Fully agree and somewhat agree
45,1 % - Somewhat agree
21,6 % - Somewhat disagree
19,6 % - Fully agree
7,8 % - Disagree
5,9 % - I don't know

STATEMENT: The use and related marketing strategies of LIVE meetings in our organisation, positively contributes to our goals.

91,2 % - Fully agree and somewhat agree
69,6 % - Fully agree
21,6 % - Somewhat agree
6,9 % - Somewhat disagree
1,0 % - Disagree
1,0 % I don't know

STATEMENT: The world is becoming a better and more sustainable place with online meetings

64,7 % - Fully agree and somewhat agree
52,9 % - Somewhat agree
21,6 % - Somewhat disagree
11,8 % - Fully agree
9,8 % - Disagree
3,9 % - I don't know

HOW DO WE MOVE FORWARD WITH EVENTS AFTER COVID-19?

Survey dates: July 27 - August 24, 2020

EVENT PLANNING AFTER COVID 19

This survey aims to defog the uncertain future of event organisation through the opinions of international meeting planners. We all want to know what we need for a quick and efficient business restart after COVID-19. This situation is an opportunity to reshape the meetings industry and make it more sustainable.

Number of answers: **1.297** respondents from **32** countries

What is the average size of a typical live or online meeting that you plan?

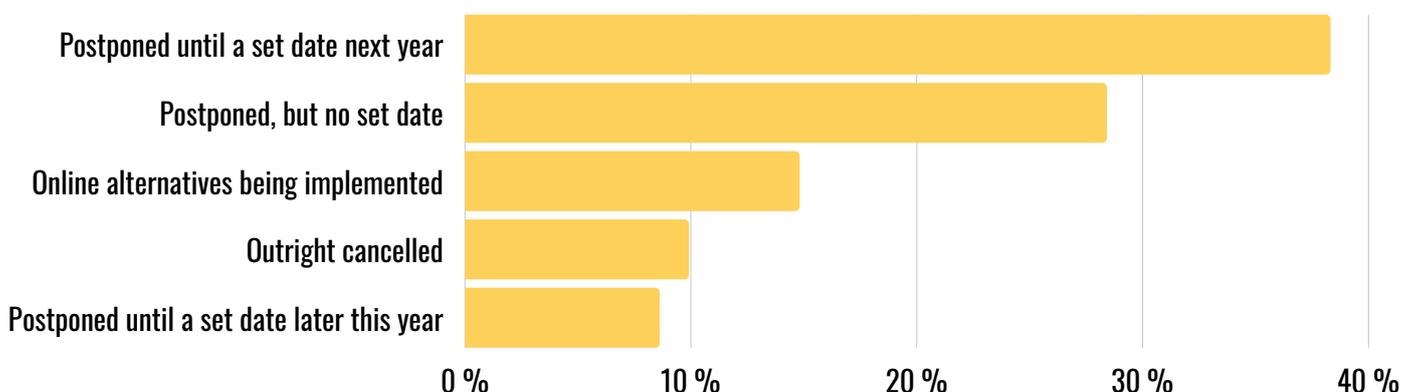
- **28,4%** 41 to 100 participants
- **21,0%** 101 to 200 participants
- **21,0%** 201 to 500 participants
- **14,8%** Over 500 participants
- **11,1%** 16 to 40 participants
- **3,7%** 1 to 15 participants

Where did you hold most of your live meetings before COVID-19?

-  **45,7%** - Hotels
-  **22,2%** - Special Venues
-  **16,0%** - Conference Centre
-  **16,1%** - Outdoor and sport venues

How are you handling cancelled events?

Most meeting planners have postponed or cancelled their events and only a few have implemented online alternatives.



Would you consider cancelling live events in favour of online/hybrid events after the COVID-19 pandemic?

- **64,2%** - NO
- **35,8%** - YES

HOW DO WE MOVE FORWARD WITH EVENTS AFTER COVID-19?

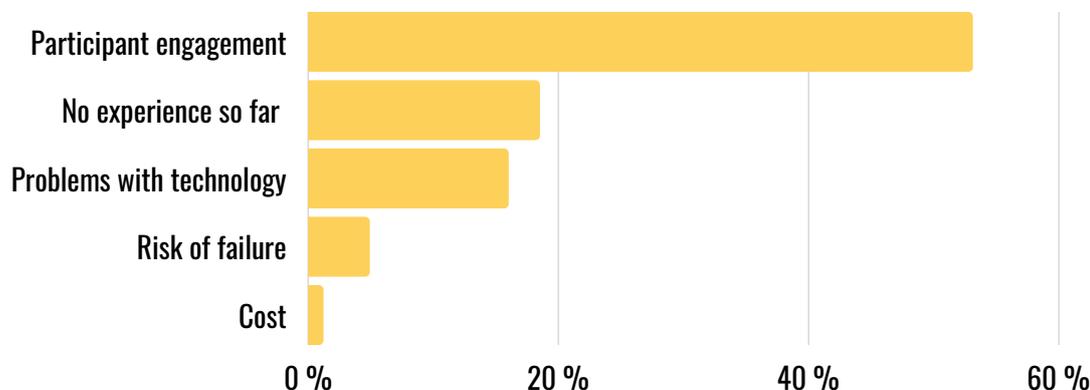
Survey dates: July 27 - August 24, 2020

If online/hybrid alternatives are being implemented, what alternatives are you using?

- Hybrid
- Zoom
- Microsoft Teams
- We either choose live OR online. Hybrid models are not the future, unless they are being planned as 2 separate events with their own planning, script and facilitators. Trying to combine a live and online event by adding a livestream and a chat does not make it hybrid. There is so much to learn and to gain for our industry, but let's not forget that we're in the business of making connections between human beings.
- We are holding short, sharp presentations sessions using a hub website with Zoom as the broadcast option
- Only tried once so far using Zoom and got mixed reactions.
- Webex platform as virtual space where we introduce different facilitation techniques.
- Eyeson Meetings
- We still do not see alternatives that can be developed as the situation is increasingly confused regarding the end of the pandemic.
- We have implemented a digital platform for virtual and hybrid events

What is the biggest barrier in organising hybrid/online events?

Our research confirms that the biggest challenge is **ENGAGEMENT** of online attendees. We still have a lot to learn in this field and it will take quite some time for the most optimal solution to be developed.



OTHER:

- Trying to squeeze a live event through a livestream channel and calling this an hybrid event
- People are all the time on the computers, they want to mingle and meet in person



Do you think carrying out online events is more expensive or cheaper than live events?

- 61,7 % - Cheaper
- 16,0 % - Much cheaper
- 12,3 % - Same cost
- 8,6 % - More expensive
- 1,2 % - Much more expensive

HOW DO WE MOVE FORWARD WITH EVENTS AFTER COVID-19?

Survey dates: July 27 - August 24, 2020

HYBRID CONFERENCE COSTS

How much do you think a hybrid conference for 100 live participants and 300 online participants costs?

- **30,9 %** - Less than 20.000 EUR
- **22,2 %** - 40.000 EUR
- **17,3 %** - 20.000 EUR
- **14,8 %** - More than 50.000 EUR
- **14,8 %** - Other

OTHER

- Depends on the duration, catering, number of speakers, speaker costs, etc.
- Depends on concept, content, tech and engagement features.
- Depends on the rental costs of the venue, the scenography, the catering.
- Depends if the live participants fly in and stay overnight

ACCEPTABLE LENGTH OF ONLINE/HYBRID MEETINGS



- **27,2 %** - 1 hour
- **23,5 %** - 2 hours
- **21,0 %** - 3 hours with a break
- **11,1 %** - 45 minutes
- **9,9 %** - 4 hours with a break
- **7,4 %** - All day is acceptable but must provide breaks
- **0,0 %** - 6 hours with a breaks

What types of events are NOT ACCEPTABLE through online technologies?

- Trade shows (68%)
- Conventions, exhibits (47%)
- Recruiting for new staff (37%)
- Sales calls (27%)
- Customer or client meetings (23%)

REFUNDS

1. Are you offering refunds to attendees who don't feel safe and want to cancel for events still scheduled?

- **70,4 %** - YES
- **9,6 %** - NO

2. Are you offering full registration refunds or credits for future events in case of cancellation?

- **46,9 %** - YES, full refunds
- **35,8 %** - YES, credit for future events
- **8,6 %** - NO, no refunds
- **8,6 %** - NO, no credit for future event

3. Are your events covered by cancellation insurance?

- **80,2 %** - NO
- **19,8 %** - YES

Surprisingly, most event planners have not insured their events against cancellation. It seems that a completely new dialogue will have to be established between event agencies and insurance companies.

HOW DO WE MOVE FORWARD WITH EVENTS AFTER COVID-19?

Survey dates: July 27 - August 24, 2020

EVENT SPONSORS

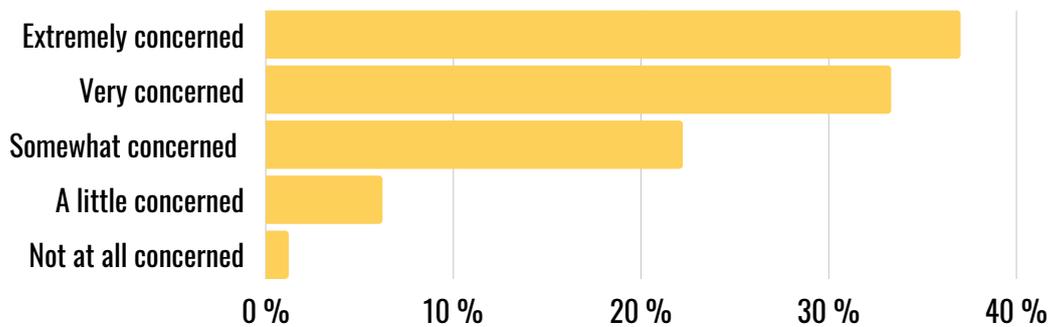
If you have cancelled one or more events, what have you done regarding the sponsors?

Answers in this segment show just how uncertain current times are. Clear sponsor policies have not been defined yet.

- **22,86 %** - Applied sponsor fees to the same event next year
- **20,00 %** - Refunded the total fee to sponsors
- **20,00 %** - We haven't decided
- **12,38 %** - Applied sponsor fees (or a portion of the fee) to a different sponsor benefit this year
- **10,48 %** - Other
- **7,62 %** - Refunded a portion of the fee to sponsors
- **6,67 %** - Asked the sponsor to donate their fee to your association/organization

How concerned are you that COVID-19 will result in less conference/event sponsorship revenue?

70,3 % of respondents are concerned about sponsorship revenue, which is quite alarming.



EVENT VENUES

Most important things when choosing a VENUE for your next LIVE event?

Priorities when it comes to choosing an event venue have turned upside down. Most meeting planners are looking for flexible spaces, a quality service and a high level of health and safety, things to be expected.

- **4.21 - Flexibility of space**
- **4.15 - Quality of services provided by venue**
- **4.10 - Health and safety**
- 4.09 - Professionalism of the venue staff
- 3.99 - Fast internet
- 3.91 - Speed of response of venue sales staff
- 3.90 - Quality of the food and beverages
- 3.60 - Price

HOW DO WE MOVE FORWARD WITH EVENTS AFTER COVID-19?

Survey dates: July 27 - August 24, 2020

EVENT VENUES - THE NEW NORMAL

What measures do you expect to be implemented at event venues when events resume?

-  **20,96%** - Hand-sanitising gel throughout the venue
-  **19,46%** - Additional cleaning of surfaces
-  **17,66%** - 1,5 metre distancing
-  **14,07%** - Single-use cups
-  **13,17%** - Face masks and gloves
-  **12,57%** - Individual lunch boxes

ADVANTAGE OF LIVE EVENTS

- 19,75 %** - Networking with work colleagues or clients
- 15,43 %** - Being with friends and colleagues
- 13,58 %** - Community bonding
- 12,04 %** - Energy from crowds
- 10,19 %** - Teambuilding
- 11,11 %** - Live entertainment or activities
- 8,64 %** Live seminars or educational session
- 3,70 %** - Sights and sounds
- 2,16 %** - Other

“

When this pandemic is over I will be very motivated to take part in live events.

95,1% of respondents agree

“

Alternatives such as livestreaming or online experiences are no substitute for live events.

91,4 % of respondents agree

“

I will not attend any live events until there is a vaccine for COVID-19.

65,5 % of respondents disagree

“

I would pay more to attend a live event if social distancing measures meant that fewer people could attend-

79,0 % of respondents agree



THE BEST OPTION FOR FUTURE EVENTS IS:

- **44,4 %** - Hybrid meetings
- **39,5 %** - Live meetings
- **12,3 %** - Undecided
- **3,7 %** - Other

EVENT VENUES DURING AND AFTER COVID-19

Survey dates: September 18 - October 10, 2020



What do meeting planners actually expect from venues?

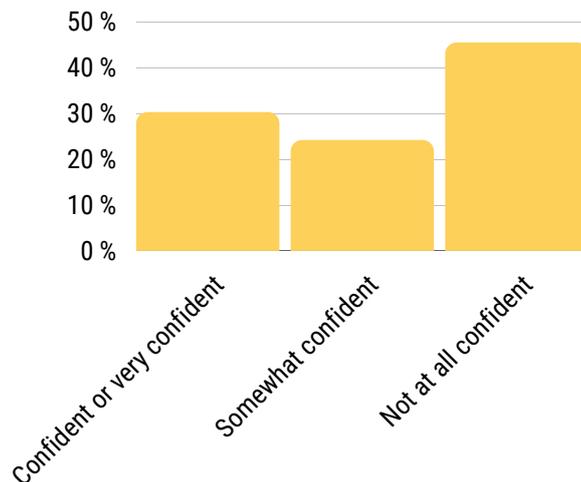
The 8th survey in Kongres Magazine's extensive research addresses the expectations of meeting planners when it comes to event venues during and after COVID-19. A lot of event venues pride themselves on being "COVID-ready" and complying with all the necessary safety precautions. But, what do meeting planners actually expect from venues during these strange times? The results of this will hopefully answer that question and help venues adapt to the complex needs of meeting planners during and after coronavirus.

Number of respondents: 558 (45,5% of respondents have more than 20 years of business event management experience)

Which venue finding platforms do you use?

	36,92 % - Venue website
	15,38 % - LinkedIn
	12,31 % - Venue Finder
	12,31 % - Other (please specify)
	10,77 % - Venue Directory
	6,15 % - Cvent
	4,62 % - Venue Scanner
	1,54 % - Tag venue

Are you confident that you will book venues (hotels, convention centres etc.) in the next 6 months?



In which format have you organised most of your events during COVID-19?

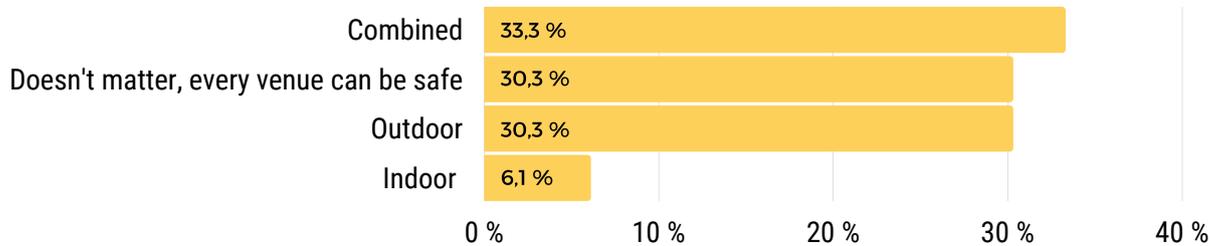
51,5 % - Online event
15,2 % - Virtual event
12,1 % - Other event types
9,1 % - Live event
9,1 % - Hybrid event
3,0 % - Multi-hub event

What is the minimum lead time for starting your live/hybrid event?

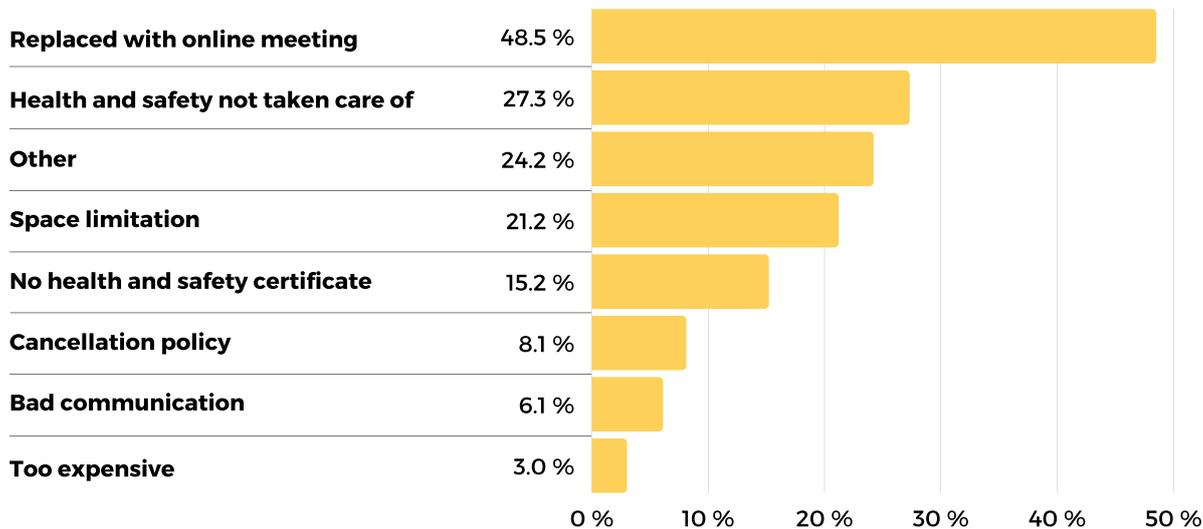
39,4% - More than a month
27,3% - From 2 - 4 weeks
18,2% - Up to 2 weeks
15,2% - Immediately



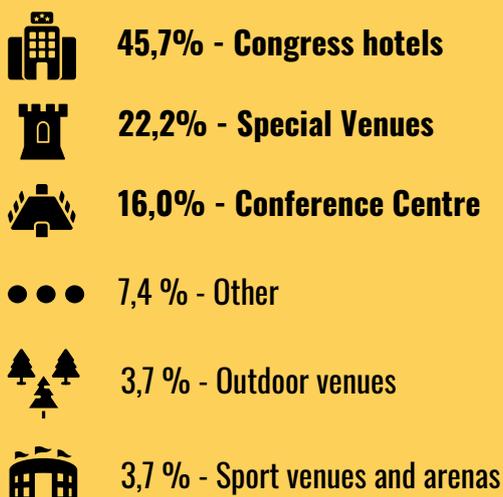
In your opinion, what kind of venues are the most suitable for events during COVID-19 if we take health and safety recommendations into account?



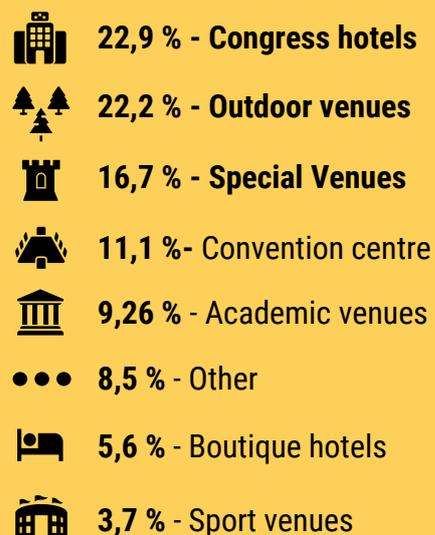
If you've recently cancelled a venue and chose another one, what were the 2 main reasons?



Where did you hold most of your live meetings before COVID-19?



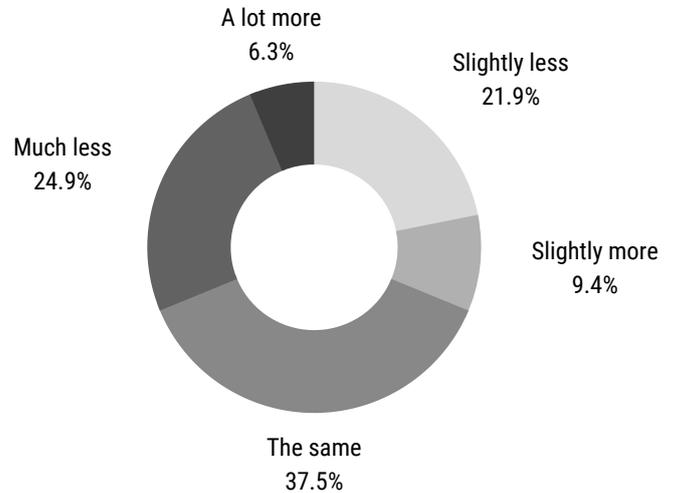
If you organised an event in the last 6 months, what kind of venue did you use?



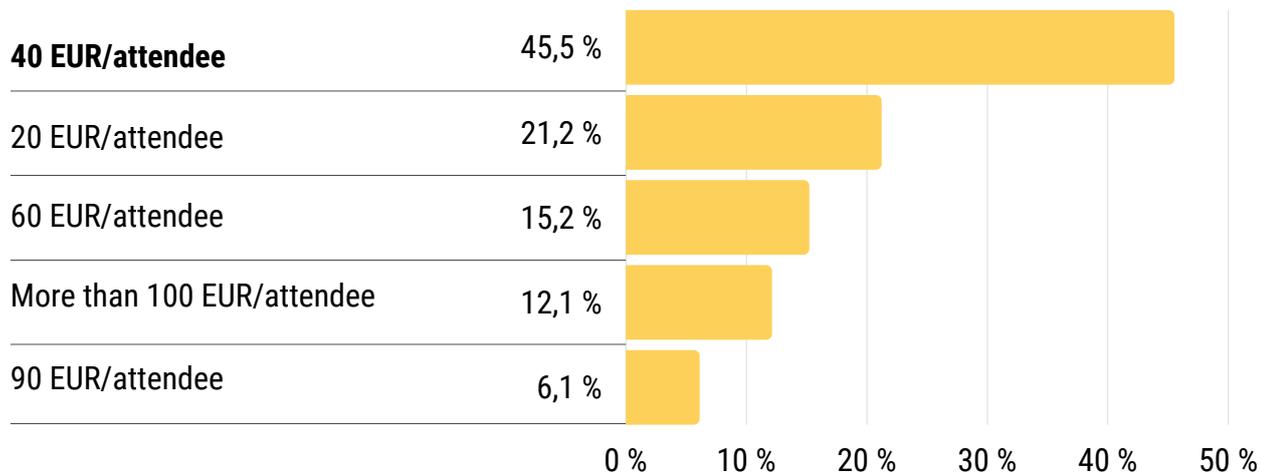


How much would you be willing to pay for a venue now (during COVID-19) in comparison to before the COVID-19 situation started?

- Less (slightly, much) - **45,4 %**
- Same - **36,4 %**
- More (slightly, a lot) - **15,2 %**



How much would you be willing to pay per attendee for a hybrid event during COVID-19?



How important do you think the following elements of hybrid events are?

(5 = very important / 1 = not important at all)

- 4.38 - STREAMING service**
- 4.30 - ONLINE engagement**
- 4.29 - SPEAKERS management**



- 4.28** CONTENT management
- 4.22** DIGITAL EVENT platform
- 4.15** MEETING design
- 4.06** LIVE production
- 4.03** COMMUNITY building
- 3.94** REGISTRATION management
- 3.97** EVENT analysis
- 3.81** SOCIAL MEDIA management
- 3.77** ON DEMAND production



If you organised an event in the last 6 months, what has the venue provided you with?

66,7 % - Updated information about available seating capacity

60,6 % - New conference layouts based on social-distancing requirements

54,5 % - All security standards (in line with government regulations)

42,4 % - Space optimisation service

27,3 % - Proper guidance and instruction for use of halls

15,2 % - Crisis management plan

What do you wish the venue provided you with, but didn't?

- 1. A more flexible cancellation policy**
- 2. Free face masks**
- 3. Reduced prices**
- 4. Queue management**
- 5. COVID tests**

What measures would you EXPECT to be implemented at event venues when events resume completely?

 **66,7 % - Hand-sanitising gel throughout the venue**

 **59,8 % - Ventilated venues/exhibition halls**

 **54,5 % - 2 metre distancing**

 **48,5 % - Additional cleaning of surfaces**

 **39,4 % - Face masks and gloves**

 **38,5 % - Queue management**

 **36,4 % - Making use of multiple exit and entry points**

 **27,3 % - Single-use cups**

 **21,2 % - Individual lunch boxes**





When it comes to **social-distancing and safety**, what measures would you **LIKE** to see at venues in the future?

- 60,6 %** - Limited physical interaction and queuing at reception and registration (if allowed by legislation)
- 56,8 %** - Registering participants in advance to enhance participant flow
- 54,5 %** - Participant health/temperature checks (if required by legislation)
- 54,5 %** - Recommended use of face masks for as long as required as per risk-based approach
- 42,4 %** - Pre-arrival risk assessment questionnaire
- 18,2 %** - Created isolation units outside the venue where possible for individuals showing COVID-19 symptoms



When it comes to **food and hygiene**, what measures would you **LIKE** to see at venues in the future?

- 69,7 %** - Avoiding participant handling of food at buffets
- 69,7 %** - Disinfecting microphones
- 63,6 %** - Implementing physical distancing through table spacing and participant seating
- 60,6 %** - Enhancing sanitation: cleaning & disinfecting tables immediately after participant has left
- 51,5 %** - Create water/soft drinks protocols (water bottles in areas where there is safe drinking water)
- 48,5 %** - Considering minimising what is placed on participant tables, mono-packaged items
- 30,3 %** - Cleaning machines handled by participants regularly



When it comes to **cancellation fees**, what measures would you **LIKE** to see at venues in the future?

- 51,5 %** - Waiving all cancellation fees
- 48,5 %** - Reducing cancellation fees/charges
- 48,5 %** - Negotiating contract obligations when event is rescheduled
- 3,0 %** - Suggestions: Flexibility on both sides so it's fair to each party.

How should venues help meeting planner engage attendees?

- 78,8 %** - Relaxation zones
- 64,5 %** - Music
- 54,5 %** - Happy hours
- 15,2 %** - Gaming and VR zones

Write POSITIVE and NEGATIVE things when dealing with venues:

NEGATIVE THINGS

1. Cancellation fees and terms
2. Slow response time, bad communication
3. Contact person is not the decision maker
4. Not ready fo COVID reality
5. No ideas how to make events unique
6. Technical staff occasionally demotivated
7. Increased prices during COVID

POSITIVE THINGS

1. Professionalism
2. Clear instructions for organisers and attendees
3. Creative meeting space design
4. Not charging extra for overflow rooms due to social distancing measures
5. Flexibility about deadlines
6. Doing their best to keep venues safe and healthy

In your role as an event planner, is there anything else you'd like to share about your experiences during the past few weeks with venues?

Late coming is still an issue to be appropriately managed in order to avoid queues.

It seems venues are becoming more amicable when discussing postponements or cancellations.

Many hotels have outsourced cleaning staff which has really reduced the quality of cleanliness.

Safety is a must!

Stay positive!

How important are the following pieces of equipment when it comes to organising an event during COVID-19?

(5 =very important / 1= not important at all)



4.55 - WiFi Dedicated Bandwidth (800 Mbps)

4.38 - Streaming platform

4.38 - Professional wireless microphones

4.33 - Webcasting / video streaming

4.29 Audience response system

4.28 TV/Video monitors

4.28 Physical network internet connection

4.27 Professional-level Video Camera

4.25 Video/data projector (LCD/DLP)

4.23 Seamless Video Switcher

4.00 Sound mixer (min. 4 channels)

3.90 Lighting - Stage wash lighting

3.90 Digital signage

3.81 Lighting - Room wash lighting