

HIGH TECH OR HIGH TOUCH



POWERED BY TOLERANCA MARKETING RESEARCH DEPARTMENT

Survey dates: **4 February 2021 - 4 March 2021**

We are all optimistically looking forward to the end of the crisis that, at least according to most, vaccination brings. However, there are still many open questions that we want to address and thus help you exit the crisis. The main question that we wanted to answer was which approach will meeting planners choose for their future events - **HIGH TECH** (digital event solutions, focus on innovative technology) or **HIGH TOUCH** (live event solutions, focus on all human senses and emotions). We also looked at what events will look like after the crisis, how will relations between stakeholders change and how strong will the new digital event sector become.

The questionnaire consisted of 24 questions and completing it took respondents 12 minutes on average.

NUMBER OF RESPONDENTS: 730

- 33.9 % - Agency (PCO, DMC)
- 27.4 % - Event agency
- 14.1 % - Destination Management Organisation
- 13.8 % - Meeting planner
- 5.4 % - Independent meeting planner
- 1.2 % - Digital event organiser (DCO)

DEMOGRAPHIC OF RESPONDENTS:

- 42.4 % - Generation X (1966 - 1980)
- 31.5 % - Baby Boom Generation (1946 - 1965)
- 20.7 % - Generation Y (1981 - 1995)
- 4.3 % - Mature generation (before 1945)
- 1.1 % - Generation Z (1996 - 2018)

For your last major event, did you:

February 2021

December 2020

40.7% - Postpone it
37.4% - Pivot it to digital
16.5% - Cancel it
5.5% - Host it normally

42.1% - Postpone it
26.3% - Pivot it to digital
22.8% - Cancel it
8.8% - Host it normally

For your next major event, will you:

February 2021

December 2020

35.9% - Pivot it to digital
31.5% - Postpone it
29.3% - Host it normally
3.3% - Cancel it

32.5% - Pivot it to digital
31.0% - Postpone it
34.5% - Host it normally
1.7% - Cancel it

*A comparison of data between different survey periods shows that meeting planners postponed fewer events than in 2020. More events were pivoted to digital and fewer were cancelled.

*Looking at the future, more meeting planners will pivot their events to digital than in 2020. The percentage of postponed events will be very similar, but the number of events hosted normally will decrease.

How far do you agree or disagree with the following statement?

After the COVID-19 pandemic, I believe I will use digital technologies more than I did prior to the outbreak.

3.88 / 5

HIGH TECH OR HIGH TOUCH

GOVERNMENT SUBSIDIES FOR MEETING PLANNERS

We asked meeting planners if they had already received any support/subsidy from the government during the crisis. Almost 58% answered affirmative, and a large part is still waiting for help. The information is important especially from the point of view of competitiveness, as destinations with adequate support will have a guaranteed strategic advantage.

Have you received any kind of support/subsidy from your government during the pandemic?



Which phrase best describes your outlook on events and meetings industry for 2021?

- 52.2 % - Negative - 2021 will be quite a difficult year
- 25.0 % - Average - 2021 set to be quite an average year
- 8.7 % - Positive - 2021 set to be quite a good year
- 6.5 % - Very Optimistic -2021 set to be a very good year
- 5.4 % - Very pessimistic - 2021 will be a very difficult year
- 2.2 % - Other

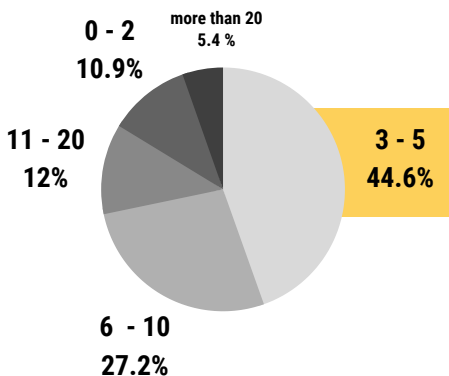
Despite the first signs of optimism, the overall assessment of the year ahead is leaning more towards the pessimistic side. **57.6%** of respondents believe that we have a difficult to a very difficult year ahead of us.

How do you feel about digital events right now?

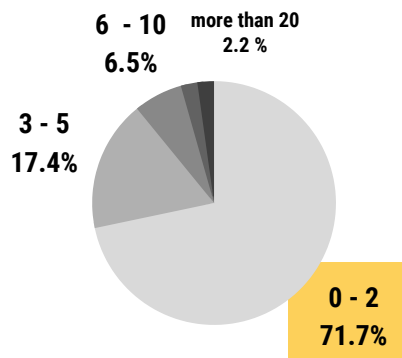
- 54.3 % - There's too many
- 31.5 % - There's just enough
- 10.9 % - Other
- 3.3 % - I want more

- Bridge until live events are back
- Some are good, most of them are TV shows with no interaction
- They will stay, grateful for this, brings many new opportunities
- It was the only chance not to cancel the events
- There are too many without value propositions
- We'd better prepare for them being here to stay

What is the number of weekly invites to digital events?



What is the number of weekly digital events that you attend?



On average, we receive 3 to 10 invitations to digital events every week (71.8%). 12% of respondents also receive more than ten invitations per week. **The majority attend up to a maximum of 2 events (71.7%).** The number of invitations therefore far exceeds the number of events we actually attend. This means that competition in the digital event market is high and supply far exceeds demand.

HIGH TECH OR HIGH TOUCH

MAIN REASONS FOR ATTENDING DIGITAL EVENTS

What makes you attend digital events during the pandemic?

The content - 10.2

Training opportunities - **8.0**

High profile speakers - **7.4**

Networking opportunities - **7.4**

New business opportunities - **7.0**

Exclusivity - **6.9**

Knowing one of the speakers - **6.4**

Incentives for registering - **4.3**

Others were attending - **3.6**

A lot of free time - **3.6**

Other (please specify) - **1.2**

The main motive for participating in digital events remains good content and related elements such as training opportunities and the profile of the lecturers. When creating digital events, you need to pay thorough attention to the preparation of quality content and the selection of lecturers.

MAIN REASONS FOR **NOT** ATTENDING DIGITAL EVENTS

What is the main reason for **NOT** attending digital events?

26.4 % - Tired of attending digital events

23.1 % - Boring content

20.9 % - Too busy

14.3 % - Other (please specify)

13.2 % - Too many invites

2.2 % - Too many marketing emails

The reasons for non-participation tell us the most about digital events. If the main reason for participation is content, the expected reason for non-participation was boring content.

MOST IMPORTANT ASPECTS OF DIGITAL EVENTS

4.43 Content

4.29 Learning something new

3.95 Charismatic speakers

3.71 Building relationships

3.62 Demos and case studies

3.58 ROE (Return on Event)

3.56 Interactive elements

3.52 ROI (Return on Investment)

3.48 Networking

3.36 Q&A sessions

3.05 Polls

2.43 Free stuff

MOST IMPORTANT ASPECTS OF LIVE EVENTS

4.42 Networking

4.41 Content

4.30 Building relationships

4.25 Learning something new

4.10 Charismatic speakers

3.98 ROI (Return on Investment)

3.96 ROE (Return on Event)

3.95 Interactive elements

3.69 Demos and case studies

3.55 Q&A sessions

3.09 Polls

2.58 Free stuff

Very important difference

For both types of events, the first five criteria are practically identical, however there is a very obvious difference. With live events, networking was positioned in first place, while with digital events, it was positioned in ninth place.

HIGH TECH OR HIGH TOUCH

How would you rate your knowledge about organising digital events?

- 41.8 % - Good, but there's still room for improvement
- 35.2 % - Satisfactory
- 14.3 % - Very good
- 8.8 % - Bad
- 0.0 % - Very bad






Respondents are confident about their knowledge of digital events. As many as 56.1% of respondents rated their knowledge as good or very good.

How difficult do you think organising digital events is compared to live events?

- 32.4 % - More difficult than live events
- 28.3 % - Easier than live events
- 26.2 % - Same difficulty as live events
- 9.8 % - Much easier than live events
- 3.3 % - Much more difficult than live events






We received very scattered answers to this question. 35.7% of respondents think that the organisation of digital events is more difficult, and 38.1% that it is easier.

Which of these LIVE STREAMING PLATFORMS have you already used?

-  64.8 % YouTube Live
-  54.9 % Facebook Live
-  51.6 % Microsoft teams
-  27.5 % Vimeo Live
-  25.3 % LinkedIn Live

- 20.9 % Other
- 13.2 % Twitter Live
- 6.6 % Twitch
- 5.5 % Periscope
- 5.5 % IBM Cloud Video
- 4.4 % Crowdcast
- 3.3 % Tik Tok Live
- 3.3 % Brightcove
- 2.2 % Dacast
- 2.2 % JW Player
- 1.1 % Glisser
- 2.2 % JW Player

Which of these VIDEO CONFERENCING PLATFORMS have you already used?

-  95.7 % Zoom
-  82.6 % Microsoft Teams
-  50.0 % GoToMeeting
-  43.5 % Microsoft Skype for Business
-  44.6 % Cisco Webex Meetings

- 29.3 % Google Meet and Google Duo
- 14.1 % Click Meeting
- 13.0 % BlueJeans Meetings
- 12.0 % Other
- 7.6 % Facebook Rooms
- 6.5 % join.me
- 5.4 % Zoho Meeting
- 3.3 % ezTalks Meetings
- 3.3 % UberConference
- 3.3 % RingCentral Video
- 2.2 % U Meeting

Other:

- Confiva
- Conference Compass
- GTW, Via
- On Air by EventsAir
- Airmeeet
- Starleaf, Jitsi, BigBlueButton
- Confer-O-Matic, Hop.in
- Foreign and Italian vendors
- Big Blue Button
- EventsAir
- OnAir from EventsAir
- BrightTALK

HIGH TECH OR HIGH TOUCH

Which elements of digital transformation do you think meeting planners should prioritise?

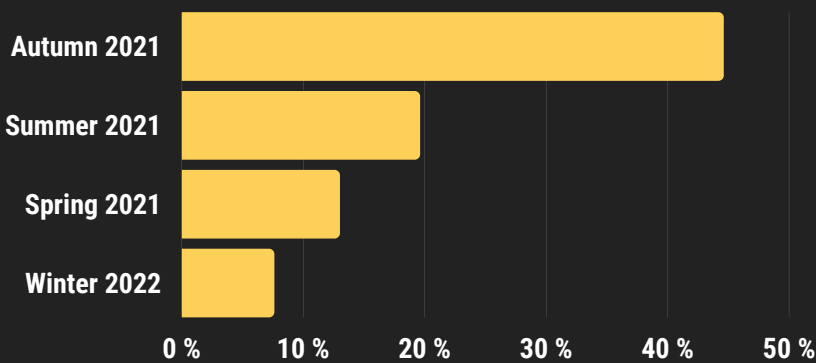
- 50.0 % - Data management
- 59.5 % - Personalisation
- 41.7 % - Marketing automation
- 40.5 % - VR - Virtual Reality
- 28.6 % - E-commerce
- 26.2 % - Gaming
- 26.2 % - AR - Augmented reality
- 22.6 % - 5G
- 22.6 % - Internet of things
- 22.6 % - Chat bots
- 13.1 % - Facial recognition
- 9.5 % - Investment in martech
- 6.0 % - Other
- 4.8 % - Wearables

A detailed look at individual areas points to hidden areas that have tremendous potential in organising events - for example, facial recognition or the introduction of high-speed 5G internet.

Other:

- Gamification
- Privacy, impact on time and life management
- To grab and keep the attention and deliver messages in a powerful way
- The interaction that exceeds polls and Q&A
- To make hybrid events easier/less expensive

When do you expect to attend a live event again?



7.6 % I don't know

7.6 % Other:

- depends on the development of the pandemic
- depends on vaccination worldwide
- depends on rules & regulations
- whenever travel becomes stress-free

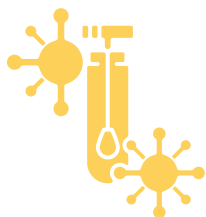
Are you planning to carry out a hybrid event in the next few months and how many?

- 48.9 % - No, I'm not planning any hybrid events
- 40.2 % - Yes, 1-2 hybrid events
- 4.3 % - Yes, 3-5 hybrid events
- 3.3 % - Yes, over 20 hybrid events
- 2.2 % - Yes, 10-20 hybrid events
- 1.1 % - Yes, 6-10 hybrid events

Almost half of the respondents will not organise hybrid events. The answers show that the concept of hybrid events is still relatively fresh and has not yet been fully established.

HIGH TECH OR HIGH TOUCH

What types of innovation do you expect from destinations or venues after Covid 19?



- 72.2 % - Contactless registration**
- 60.0 % - Rapid antigen or PCR testing**
- 57.8 % - Professional studio for digital events**
- 36.7 % - AR services (real-time use of information in the form of text, graphics, audio)**
- 26.7 % - VR services (computer-generated 3D environment)**
- 8.9 % - Other (please write)**

Other:

- Local AV suppliers to record the plenary presentation
- Good internet connection to stream broadcast
- Adapted networking tools/opportunities
- Hybrid events in terms of a combination of on-site and interactive digital environments
- More flexibility
- Embed the city experience into the conference

What are the biggest obstacles for resuming events?

- 81.5 % - Travel limitations**
- 73.9 % - Government permission**
- 58.7 % - Concern over the safety of attendees and stakeholders**
- 46.7 % - Cost of safety and social distancing**
- 35.9 % - Physical distancing logistics**
- 31.5 % - Budget problems**
- 23.9 % - Real-time viral testing**
- 3.3 % - Other (please write)**

Currently, the biggest obstacles for relaunching live events are restrictions on travel and free border crossing, and concern for the safety and health of participants. Countries that have the answers to these questions will be the fastest to restart the meetings industry.

Who would you trust the most to organise your next event after the pandemic?

- 40.2 % - No one, we would organise the event ourselves**
- 19.6 % - DMC (Destination Management Company)**
- 16.3 % - PCO (Professional Congress Organiser)**
- 14.1 % - EVENT agency**
- 5.4 % - Other**
- 2.2 % - DCO (Digital Conference Organiser)**
- 1.1 % - MARKETING agency**
- 1.1 % - VIDEO CONFERENCING platform provider**

In uncertain times, most respondents trust themselves. DMC's and PCO'S are also positioned high, but answers show that agencies will have to work hard to regain the trust of their clients.

Other:

- Any partner, whom we know personally and we trust
- Probably not a new partner
- All of the above if they are professionals and can deliver a hybrid event

HIGH TECH OR HIGH TOUCH

When looking for a partner for a post-COVID event, what are the key factors for you?

- 48.4 % - Comprehensive set of services
- 44.0 % - Strategic partnership
- 39.6 % - Best value for money
- 38.5 % - Delivering projects on-time
- 33.0 % - Delivering projects on-budget
- 28.6 % - The best references
- 27.5 % - Green policy
- 3.3 % - Other

The question about selecting partners nicely complements the previous question about choosing an agency for the next event. In first place is the diversity of services, and in second - a strategic partnership, which can be interpreted quite broadly.

Have you already used a professional online event studio during the COVID-19 period?

- 40.2 % - Yes, a few times
- 37.0 % - No, never
- 14.1 % - We are thinking about using one
- 8.7 % - Yes, many times

Almost half of the respondents had already used such a studio. There is also a large proportion of those who do not yet have experience with this.



How important do you think sincere concern for the sustainable organisation of events and attitude towards the environment will be in the future?

- 70.7 % - More important than ever before
- 27.2 % - Same level importance as now
- 2.2 % - Less important than now

If you had to choose between HIGH TOUCH or HIGH TECH, what approach would you take for your future events?

- 66.3 % - High TOUCH (live event solutions, focus on all human senses and emotions)
- 12.0 % - High TECH (digital event solutions, focus on innovative technology)
- 12.0 % - Other
- 9.8 % - Neither

Other:

- A combination: High BRYD ;-)
- High TECH and High TOUCH, you need to focus on both!
- A mix of both high tech and touch
- High touch providing exclusive content and user experience
- Hybrid - take the best of both
- Both have relevance in future but for different purposes
- Nothing can compete with live events!

Probably the most provocative question of the research gave us a clear answer that we will have to combine both HIGH TECH and HIGH TOUCH at future events. This simply means that future events will be hybrid, despite the fact that most respondents prefer HIGH TOUCH.

Kongres Magazine's Surveys

POWERED BY TOLERANCA MARKETING RESEARCH DEPARTMENT

Ever since the epidemic started, the editorial board of Kongres Magazine has been carrying out in-depth research on the impacts of COVID-19 for the meeting industry, studying the ever-changing needs and expectations of meeting planners. As the owner of Kongres Magazine, Toleranca Marketing agency was entrusted with the logistics of carrying out the research.

Need an in-depth market research?

Get in touch with our team of creative thinkers

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We would like to thank everyone, who has taken part in the research so far. With your contribution, we are one step closer to overcoming the new pandemic reality.