

GSAE sent an In-Person Meeting Pulse Survey to 286 members – executives representing trade associations, professional societies, civic groups, association management companies, chambers and CVBs, plus third party meeting planners. We launched the survey to help our members benchmark their event plans against other organizations and to give our GSAE suppliers data to plan their own economic recovery.

The survey was open August 18 – September 1, 2020.

Survey questions: <https://www.surveymonkey.com/r/TF2SGBG>

111 individuals completed the survey.

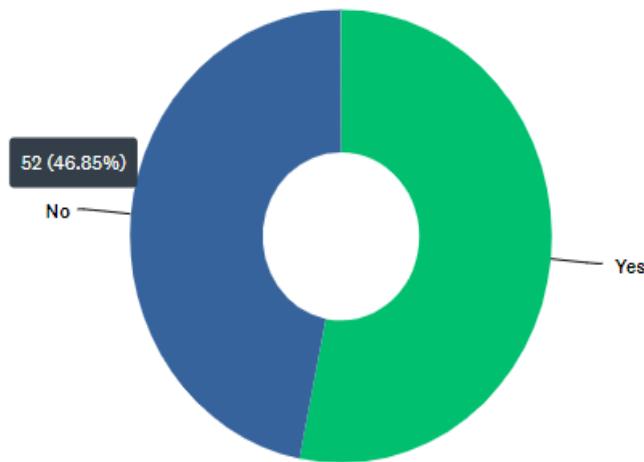
The results represent at least 86 unique organizations (self-reporting).

By Membership Scope:

- 35 Georgia-based associations
- 16 national associations
- 5 international associations
- 6 local organizations, including civic groups
- 8 Association Management Companies, representing state, regional and national organizations
- 16 unknown

1. Is your organization currently booking meetings or sourcing new RFPs?

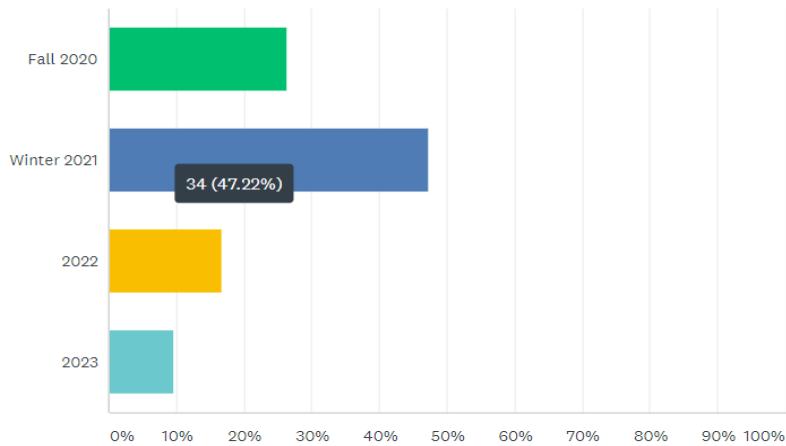
Answered: 111 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	53.15%
No	46.85%
TOTAL	111

2. When are you looking to book your organization's next in-person meeting?

Answered: 72 Skipped: 39



ANSWER CHOICES	RESPONSES
▼ Fall 2020	26.39%
▼ Winter 2021	47.22%
▼ 2022	16.67%
▼ 2023	9.72%
TOTAL	72

2b. Other timeframe (please specify)

- 19 respondents - Fall 2020
 - Hybrid in Fall
 - One Dec 2020 and one Feb 2021
 - Hopefully in October if the pandemic slows down
- 35 respondents - Winter 2021
 - Some in summer of 2021 (AMC)
- 13 respondents – 2022
- 7 respondents – 2023
 - As early in 2021 as our members decide
 - Already booked through 2022

3. When do you think your members will return to in-person meetings? (Season or quarter, year)

- 11 respondents – Summer or fall 2020
- 55 respondents – within 2021

Additional Comments

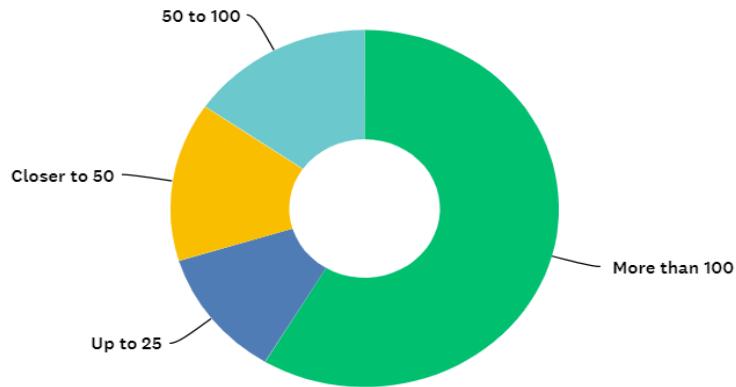
- After the virus is under control. Fall 2021 at the earliest. Perhaps 2022.
- Currently meeting
- Don't know, need to test and find out
- Good question: when there is a vaccine or when the infection rate drops a lot.

Additional Comments re: return cont.

- Meetings are an expense (not revenue) for our association, so we decided it is safer to cancel all in-person meetings until 2022. Our board defunded all in-person meetings and travel until 2022.
- Most companies represented in our membership have not yet returned employees to their offices, and travel continues to be off the table. It is hard to anticipate when travel will open up again.
- No idea
- Not sure
- Not sure. Have had small meetings but the general membership probably not until July 2021.
- Once we have a vaccine.
- Praying it's Dec. 2020. More likely Q3 2021
- Slowly, but with more confidence in 2021
- Small meetings in Spring Larger meeting 2022
- Some in 2021, but COVID has had a dramatic impact on City budgets, so travel and education budgets have been cut.
- Spring/Summer 21 or later
- This fall-- small roundtables. Next fall annual conference
- This is the magic question. We can guess all we want, but it's going to depend on vaccines and positive case trends more than anything. We're currently planning on hosting in-person events again in early 2021, but that is such a tenuous plan, based on how rapidly the world seems to change these days.
- Truly not sure. It will depend on positive COVID rates.
- Unsure of that, we have a golf tournament planned for Sept 15 we're hoping we still will host. Other than that October.
- Varies. Some in Fall others have said no attendance until at least April or 2021
- We already have - July 15th - next one scheduled for September 16
- We are doing in person meetings now and have been since July. It is possible to do them safely.
- We are having our annual expo August 25-27, 2020.
- We are hoping for next summer (June 2021) for our annual field trip.
- We are moving forward with our golf tournament in Oct. 2020. Possibly looking into an outdoor/warehouse event in the early fall.
- We are not booking anything new until the spring of 2021.
- We have an in person meeting scheduled for September 2020 and registration is open.
- We have had a few already
- We have our first in-person meeting next week with 25 people registered for a four day event. The next is the end of Sept. with 110 registered for 2 1/2 days. Both in hotel properties.
- We have recently surveyed our membership for a Fall of 2020 event and the comfort level to attend is only about 1/3 from those responding.
- We have returned to 10+ attendees.
- We hold local meetings so our members do not need to travel to attend. We already held a golf tournament and plan to hold an networking mtg in Sept with social distancing.
- We hope in January or March
- We returned in July and have another scheduled in October.
- We will not plan on this until there is a vaccine available. To take a wild guess, 2022.
- We're moving forward with a March 2021 meeting.
- When the have a vaccine and meeting restrictions of six foot and mask are lifted. When students are back in the class rooms full time.
- When there is a vaccine and people feel more comfortable

4. When your organization's in-person meetings return, what size meeting do you anticipate?

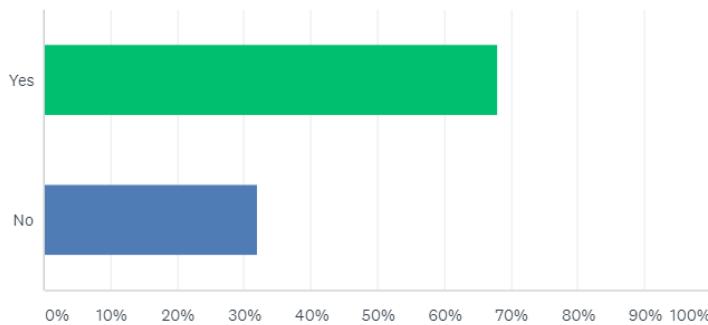
Answered: 111 Skipped: 0



ANSWER CHOICES	RESPONSES
More than 100	58.56% 65
Up to 25	11.71% 13
Closer to 50	14.41% 16
50 to 100	15.32% 17
TOTAL	111

5. Do you anticipate having a virtual component to in-person meetings?

Answered: 106 Skipped: 5



ANSWER CHOICES	RESPONSES
Yes	67.92% 72
No	32.08% 34
TOTAL	106

Hybrid Meeting Comments

- Not unless this drags on for a long time
- Don't know yet.

Hybrid Meetings cont.

- Maybe
- Not sure really
- Not sure yet!
- Not sure if that will be necessary
- We will if we need to
- Needed a maybe here. We need to.
- I hate virtual meetings
- I hope not, but will if we have to
- We won't live stream but we'll record
- Forever more :)
- All meetings if run in-person will be hybrid with online live streaming
- Just had a virtual meeting in August, last week!
- We would like to not have to offer hybrid. But, we'll see what's happening at that time.
- We hope not but are exploring being ready if needed
- Many of our members cannot travel, so hybrid will always be most inclusive.
- We hope the pandemic will be over by 2022.
- uncertain - probably more likely than prior to the pandemic
- Leadership meetings (once they resume in person) will likely have people participating virtually for some years to come. Our main conference will probably offer a reduced virtual track.
- Virtual through the fall then probably hybrid in spring 2021
- We are hoping our Annual Convention next June will be in-person, but know that we cannot expect, nor accommodate our usual 2500 people. Therefore, we will likely offer parts of it virtually.
- Our smaller meetings have had phone / web participation for a long time. If we do it for a Workshop (in past, ~275 people attended), it will be a first.
- Still figuring out if we want livestream or record and offer on-demand after
- We are giving people the option.
- Our parent company has webinars and we do not compete with them.
- Some components of the meeting will be hybrid.
- We have some speakers who are on company mandated restricted travel. Looking at option to offer members on similar travel bans the option to join remotely.
- We do a blend, live streaming with a few attendees in person

6. What are the biggest challenges your organization is facing right now in regard to booking future meetings?

Uncertainty

- Uncertainty of attendance; members see this so differently across the board;
- Uncertainty about pandemic
- Uncertainty among possible attendees, and company policies prohibiting in-person meetings
- Decline in participation
- The unknown
- Uncertainty!
- Simply the uncertainty about when it's safe to begin
- Uncertainty on when we/our attendees will feel safe again.

Uncertainty cont.

- Uncertainty of members about safety - Most corporations are not allowing their employees to attend live events until 2021
- Uncertainty - our three large meetings were re-scheduled in the previously contracted properties into 2021, but there is concern that may be too soon to be viable.
- Predicting the future. No one knows how long this will last and how many people will be interested in travelling nationally.
- Uncertainty. Not know when we will get back to normal. We've just decided to hold our January meeting completely virtually, so making that great is our challenge.
- Like everyone else, the unknown.
- Uncertainty about the conditions and the corporate travel policies that will be in place at the time of the meeting.
- Getting a handle on whether members CAN or WILL travel at all to a meeting
- Not knowing when the pandemic slows down or when the vaccine will be available.
- Uncertainty
- The unknown of what CDC restrictions will be then (or attendee comfort levels)
- Uncertainty. We actually were set to have an in-person conference in 2 weeks but had to cancel. It wasn't because of fear or concern, but our members' companies prohibited travel through the end of the year. Until those bans are lifted, we're hamstrung as it pertains to anything in-person.
- Knowing the right time to go back.
- Knowing when we can be in person again
- Until there's a vaccine, very hesitant to put a group bigger than 20+ together in doors.
- If the pandemic is going to be over
- Uncertainty for ability to return to in person
- Unknowns around regulatory protocols, and unknowns around member company guidelines re attendance at in-person events

Membership & Attendance

- Our workers are essential, so they are not being allowed to attend training.
- Guidelines around schools which is keeping them grounded and within their local community
- Whether members are able or willing to attend
- We are essential works (power supply and distribution) and under non-essential travel bans.
- Some properties are holding our feet to the fire on cancellation fees and unwilling to negotiate for '22-'23. We already have some contracts in place for next year. We can't just magically make those disappear. It's all small properties that are being difficult, not large chains. I get it that they are struggling but so is everyone with this mess.
- We represent providers who cannot run the risk of bringing COVID from a large gathering into their place of business. They are fighting to stay in business much like the restaurant business. So I anticipate booking in person meetings as no one would attend until the virus is under control - perhaps 2022.
- Our members care for a fragile group in their homes. So, they have to be so very careful and not be exposed unnecessarily. Until the communities can be open to families, along with a vaccine, we will most likely continue to have meetings virtually.
- Our members cannot afford to send folks in person either financially or by sparing human resources
- Members and organizations feeling confident in their safety.
- Industry is in crisis, many members are wearing many hats, so time constraints exist

Membership & Attendance cont.

- Knowing when our leadership will be comfortable to start meeting again. For example, if we knew it would be April 2021, we could start sourcing venues now, but we won't know until Jan/Feb and that will make getting locations problematic.
- Companies telling us they cannot send any people yet
- Unknown attendee sentiment for registering and their company travel restrictions (safety and budget related)
- Vendor partners are still unable to participate based on corporate decision making.
- Budget reductions of our members.
- Volunteer leadership

Safety & Travel Concerns

- Safety concerns with Covid-19, travel restrictions imposed on government employees and others, reduced budgets.
- Government restrictions
- Travel restrictions
- Company travel restriction policies
- Members who are on travel freezes
- City restrictions
- Our member's corporate travel policies. They are all over the board.
- Will members companies allow them to travel?
- State travel restrictions. Our members are ready but if they are in a state such as NY with travel restrictions it makes it difficult.
- End of pandemic - allowance of travel
- Following the social distancing guidelines.
- Conventions hosted by others in our industry that we attend are being canceled.
- COVID and liability concerns around holding an event.
- Understanding of and enforcement of safety protocols on the part of the venue, staff, and participants. General feelings of "safety" are lacking.
- Health and safety, information
- Covid restrictions, by employer or chosen city
- Most of our states are hot zones.
- Must have vaccine
- Safe Attendance
- Timeline for planning when it will be safe to host
- Uncertainty about changing safety protocols.
- Knowing when Governors will make changes to guidelines in place now.
- Comfort level of members to attend; travel bans

Meeting & Hotel Concerns

- Member travel budget restrictions and hotel / venue space considerations
- Compression due to postponement agreements and right-sizing for the future in terms of space, attrition, f and b
- Cancellation & attrition clauses
- Deposits.

Meeting & Hotel Concerns cont.

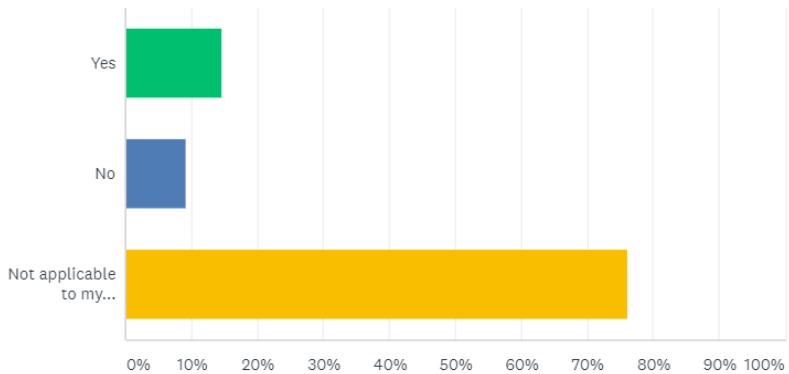
- Sales People at the hotel responding back to the RFP
- We were able to move our 2020 contract to April 2021. I thought that would be fine, now I'm starting to get more worried. I think my members will travel to attend, worried that vendors will have company travel restrictions still in place if there isn't a vaccine. I hope hotel will be more flexible with room block deadline.
- Room block
- For actual bookings, difficult to work with some venues because no staff.
- Flexibility with hotel on cancellations
- Deposits that are required and whether it is refundable if the association is concerned about hosting an in-person meeting at that time.
- Estimating group size
- We will not sign a contract without a force majeure clause that provides cancellation without penalty in the event of pandemic-type conditions.
- Satisfying everyone's needs for networking & facetime for our sponsors with our educational & recognition for our members
- Need for quality outdoor space, weather resistant that can serve alcohol on premises.
- Our convention is already booked for 6 years out. Some smaller one-day meetings are on hold but we hope to resume in the Spring.
- Knowing the number of room nights to book and other hotel items to commit to so far out.
- Not booking too many virtual options because the amount of knowledge we can share isn't endless and we don't want to diminish the value of what we do offer.
- the travel policies of our member companies
- Size of venue so that we can space out properly.
- If it's in our members budget and university travel budget allowances
- Not currently booking but I'd think anticipating what things will be like in a few years is the hardest part. How long will we be distancing? My crystal ball is too hazy!!
- When do we make this decision? IF we want to have summer 2021 meetings - we probably need to look into this now, but we don't know what it will be like next summer. Meetings next year will be difficult to make with any lead time.
- Would like to have larger crowds.
- Figuring out attendance so have a better idea of room block so don't face attrition
- We are currently just focusing on our virtual conference that will be held in late October.
- Hotel contracts because of the unknown of how many will attend. We have history for these events but uncertain how many will attend. we have a strong force majeure clause so I am hoping we will be ok.
- Need larger sites but can only have a few attendee, but don't have the funds to pay for a larger site
- Flexibility in attendance numbers and implementing social distancing.
- We have had to scale down our luncheons to maintain social distancing.
- Ensuring that contracts are fair for all parties

General

- Media overkill
- Technology
- Economy

7. If you planned "green" meetings before COVID-19, do think you will be able to maintain sustainability initiatives?

Answered: 109 Skipped: 2



ANSWER CHOICES	RESPONSES
▼ Yes	14.68%
▼ No	9.17%
▼ Not applicable to my organization	76.15%
TOTAL	109

8. Is there anything CVBs/hotels/attractions can do during this time to help you with planning future meetings?

General Suggestions

- Be flexible
- Be flexible with attrition and guarantees
- Continued flexibility with attrition to the extent possible
- Nothing else. They have done a great job of showing how we can have a socially-distanced and safe-as-possible meeting.
- Be flexible, communicate often, remember we are all in this together. Have clear, concise plans to accommodate people. Work with city governments to ensure safety for guests in light of the current rioting taking place in various cities (mostly outside of Georgia).
- Industry best practices for social distancing, eating, educational sessions etc.
- Just let us know they are there especially with hotel Sales Managers not available at times.
- Be understanding and flexible
- Remain flexible as they have been doing - attrition, re-booking, etc.
- Just be flexible and understanding. We are trying to bring them business. How they (and we) perform during this difficult time will determine how much business bounces back.
- Engage with GSAE
- Stay patient
- Just being patient as we try to sort out what we need to do. (most have been!)
- Oh I wish there was. But again, the concern we have is when our member companies will ALLOW their employees to travel again. Hotels have been so great at adapting, but so much of this is way outside their control and even ours as planners.

General Suggestions cont.

- I cannot think of anything. However, If I do, I'll be sure to reach out. I've used them in the past and know their value.
- Take note of how GSAE produced the annual event in Savannah last week!
- Great creative and re-think events, in particular receptions, in order to host them safely while achieving networking objectives.
- They are already awesome.
- Be very flexible
- Be flexible and understanding
- Just be patient and be prepared for some last minute meetings once people are comfortable to start meeting again.

Incentives

- Additional incentives, including some reduced rates
- Flexibility is key right now. Reduced or waived attrition fees, as organizations are hesitant to commit.
- Include clauses that allow for easy cancellation due to Covid.
- Help get grants/funding for those willing to have meetings
- Be kind. We know they are hurting just as bad as we are. No minimums. Reduce service charges back to reasonable 20%.
- The earlier we can plan the rebooking or cancel the better. Waiting to see if regulations or travel bans extend over the meeting dates through June 2021 is not realistic during a global pandemic.
- Lower prices and flexibility. We need more of both to motivate more people to show up.
- Keep contract options open if Covid-19 continues
- Be maximally flexible on attrition eliminate F&B minimums so we don't risk paying for empty hotel rooms and are only paying to feed the attendees who are actually there.
- space layout and new capacity charts
- Helping venues to understand that allowing orgs to book without fear of huge financial penalties in the event of a COVID-related cancellation would actually make orgs much more willing to try to make in-person meetings happen sooner rather than later.
- Work with vendors to offer up tents, heaters, extras that allow us to move forward in more outdoor spaces for the comfort and safety of guests.
- The ones that I typically deal with have been awesome in staying in touch and providing safety measures they have instituted.
- Flexible / no minimums for room blocks, F&B
- Let us know their room capacities for meals and sessions with current distancing guidelines
- Reduced room costs and just charge food and bev
- Adjusted space grids and diagrams for distancing. Allowing flexibility in minimums and slippage. Extensive training and education of their own employees.
- Present me with a plan where we both can benefit when considering all of the uncertainty. Let's negotiate the potential cancellation of a meeting while we are considering the contract. For example, require a larger nonrefundable deposit, but allow me to cancel the meeting within 30 days.
- Contract flexibility for 2021-2023 bookings
- Suspend attrition and food and beverage minimums and we're good to go!
- The assurance they will work with us on attrition and F&B guarantees.
- We need ballrooms but at a reduced cost as we can only seat a small group of individuals

- Flexibility in rescheduling meetings into 2021 if necessary, because of COVID.

Improvements

- They can use this time to update, refresh and take a new look at their offerings and then be ready when the flood gates open!
- Provide new floor plans with new spacing
- No one seems to have plans in place to secure food service should there be a staffing issue at the hotel. The last thing I need is 400 hungry members with no backup plan for food if something happened to the hotel's kitchen staff.

Safety

- Follow safety guidelines
- Make their COVID protocols very clear. I think we are seeing with the NBA that you can prevent the spread of COVID if things are booked in bubbles. It will be interesting to see how college football teams traveling and staying in hotels do. I would really stress to those hotels that they get it right. Personally, I had to stay in a hotel while taking care of my parents. I liked the sanitization sticker on the door (unbroken seal) and the remote in the plastic bag, for example. Didn't know those things were in place when I chose that hotel.
- Be up front with restrictions
- Ensure that facilities are clean, employees are well trained and are ready and willing to support the function.
- I think that it would be appropriate for CVBs and hotels to develop minimum common guidelines for all to work toward achieving. This information would be shared with associations and provide a level of confidence that then could be shared with prospective attendees. The electric industry (nationwide) began working on a COVID guidance document in March.
- Completely handle safety measures and give us a done-for-you kit with messaging for correspondence so we can trust that everything is fine for our members.
- Proactively provide flyers, brochures and another other material we can pass along to our members showing specifically what you're doing to provide a safe environment.
- We hold our events at XXXX in Alpharetta, GA. They have been great in their Covid19 protocols and helping us out to obtain a larger turnout.
- They could do an if/then timetable or flow chart of tentative process: if COVID hospitalizations are at some level (or pace) at this date, then meetings of blank size are allowed.
- Guarantee health, safety, require masks and social distancing... if they and their local LEO will not enforce these mandates, no one from our org will consider bookings
- Share plans for how they will help us socially distance our events.
- Highly detailed social distancing and disinfecting information.
- Post-COVID policies and procedures, so I don't have to come up with them.
- Proactively tell us how they will keep us safe at their meetings through the lens of the attendees.

9. What question should we have asked you on this survey that we didn't ask? (And how would you answer your question?)

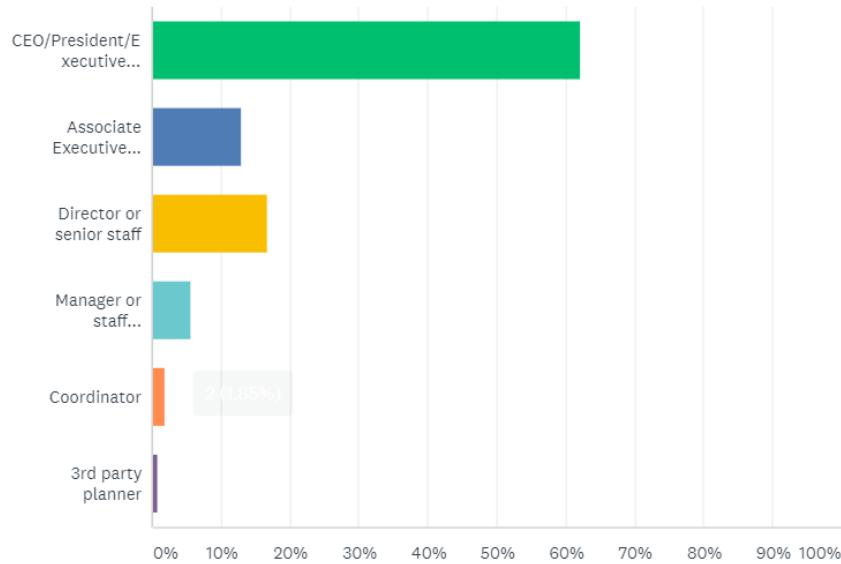
- If fewer in-person meetings are reduced or if attendance is lower (for revenue generating events) how do you plan on replacing the revenue?
- Anecdotal questions about each association's membership and how they're responding during COVID may have provided some industry bias that would be helpful.

What Should We Have Asked cont.

- Org profile: Equal male to female ratio, majority are government employees, age range 45-65
- What types of meeting and events do you anticipate hosting
- Or profile: 700 members; Georgia-centric; 7 monthly, luncheon meetings in ATL; Workshop in May and Annual in September
- How often do you personally go out in public? Other than the grocery store, do you go out to restaurants?
- Would you like more information on virtual meeting platforms - comparison information and training? Answer is YES!
- Q. What Date will Covid-19 be over. A. We'd have to be a Seer to know
- Are you doing hybrid events? Comment: Thank you for taking the time to get this info.
- A list of safety precautions that groups might anticipate/require from a CVB or property
- How far out have you cancelled your meetings?
- What percentage of your typical attendee base usually fly to your meetings? 90% (So air travel restrictions/ease/safety is a significant complicating factor as well.)
- What % do we anticipate attending previous years.
- What are you looking for from a hybrid event? I would look for a great location with good, socially distant activities for families to spend time outside of work, and good internet connection to "attend" meeting rooms.
- Maybe a benchmark to determine how many meetings we normally book for comparison.
- What are your member's main concerns about meetings? Being able to distance and not pass things around where multiple people are touching something. Also, members want to be assured that the meeting location is taking the regulations seriously.
- In the area regarding when your next in-person meeting will be held: info on the type, location etc. Ours will be a one-day trade show in Atlanta. But we'll also host large breakfast seminars (in ATL) and an out of town conference (already booked for NC)
- What protocols are used to make attendees feel comfortable? What advertising/marketing is being used to get the word out and get a larger turnout?
- What can GSAE do? I would love to see some Zoom or virtual meetings for meeting planners to discuss best practice ideas for in person meetings.
- Offer option food options to save \$\$ for both the site and the association
- Impact on association finances and how it will impact our meetings. We are running a deficit for 2020 and therefore are watching every dollar spent. If there are uncertainties about whether we can at least break even on a meeting, we may not hold it.
- How many meetings did you move to virtual? How successful did your members feel the meetings that were moved to virtual were?
- When do you think you will hold your next in-person large meeting?
- How can we ensure both association and the venue can share risk. Too often it seems the property loses and association wins (cancellation fees). Can we negotiate something in the future that anticipates this type of interruption - so both walk away with some type of win. I would love to discuss this with some type of focus group.

10. Respondent Job Function:

Answered: 108 Skipped: 3



ANSWER CHOICES	RESPONSES
▼ CEO/President/Executive Director	62.04%
▼ Associate Executive Director/Vice President	12.96%
▼ Director or senior staff	16.67%
▼ Manager or staff specialist	5.56%
▼ Coordinator	1.85%
▼ 3rd party planner	0.93%
TOTAL	108

Final Thoughts

GSAE strives to give you the information you need to run your organization successfully and to help you be better at your job. If you represent an association looking to place an in person meeting in the near future, please consult our GSAE Membership Directory and connect with a GSAE member first.

It's still pretty ugly out there right now. We encourage both sides, association and supplier, to be fair with one another and to show grace as we navigate the unknown and the uncertain. GSAE is known as a nurturing, supportive community. Let's continue to live up to our reputation *together*.

Thanks for your support and your engagement. We are sharing your ideas internally, but please continue to let us know how we can help you and our GSAE community.

Wendy W. Kavanagh, CAE, GSAE President
wendy@gdae.org