

The Conference Roadmap to Recovery

Survey Shows Paths Forward for 2021 Association Conferences

Informed by
8,525
Responses
Recent Survey



Bruce Rosenthal
Associates, LLC



Foreword

With our sincere apologies, this report will not predict the future of association conferences. No association executives should expect a clear path through COVID virus variant outbreaks, vaccination distribution, changing government regulation, and evolving employer policies.

However, this report will provide quantitative insights derived from a large survey of association members and meeting attendees. Informed by 8,525 responses, we have a deeper understanding of the diverse factors that individuals weigh when making conference attendance decisions, trends among employer reimbursement and travel policies, and more.

As organizations contemplate the best formats for conferences and probability of event-derived income during and immediately after the pandemic, this report's insights contribute data for decisions that are too-often driven by personal instincts and bias.

The research findings in this report are based on a survey conducted on behalf of 26 associations representing numerous business and professional sectors. These organizations joined in an effort to gauge their communities' desires, concerns, and tendencies toward conference participation within the context of current pandemic realities. The survey was conducted in January 2021.

The United States domestic travel and gatherings environment is quickly shifting and the findings of this research will quickly age. We are committed to supporting requests for additional follow-up research. If you would like to add a survey of your members or would like access to the full anonymous data set, please contact one of the authors.

Chris Gloede

Paul Miller

Bruce Rosenthal

Three handwritten signatures in black ink, corresponding to the names listed above them: Chris Gloede, Paul Miller, and Bruce Rosenthal.

The Future For In-Person Conferences

Associations planning in-person gatherings are struggling to develop a successful and satisfying approach. The pandemic added barriers related to crowd gatherings, reduced individual and organization financial capabilities, and increased family obligations related to remote schooling, and more.

Even before the pandemic, organizers faced concerns related to travel environmental impact, international travel visa restrictions, and growing quality of professional virtual event platforms.

These past and present headwinds create a difficult environment for large in-person events through 2021 and beyond.

Still, many associations are committed to navigating through the numerous barriers to maintain an in-person event footprint that meets the traditional needs of their members, maintains important organization traditions, and preserves sponsorship and other revenues that support broader operations.

Our survey unveiled important levers that associations can use to help improve the likelihood of in-person conference success. It also suggests creative and new conference formats for experimentation and evolution. Our survey clearly demonstrated that in-person conferences for the immediate future will experience lower registration counts and require changes to meet the needs of those people that do attend.

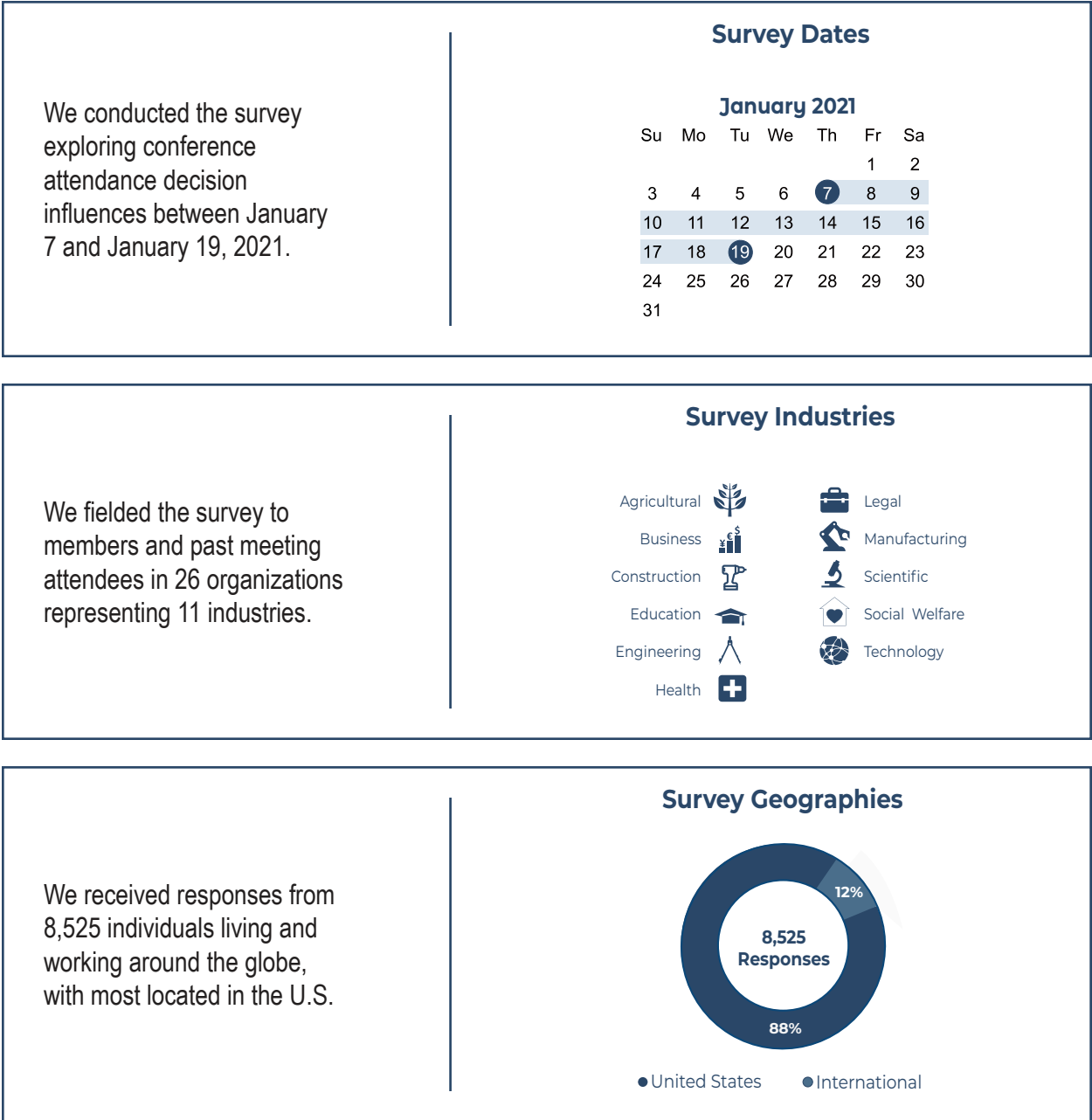
Planners should consider six important insights when making in-person conference decisions:

- Virtual events are now a mainstream format
- Conference format preferences are split
- Employers reduced conference financial support
- Vaccination affects in-person attendance
- Venue policies influence in-person conference attendance
- Hybrid hub-and-spokes are the emerging format

The Conference Format Research

“The survey information allowed us to quantify some concerns around member in-person event travel. We will use this information to inform our board of directors and hotel partners as we evaluate the future of our 2021 event.”
Aubrey Wanner, National Society for Histotechnology

At the time of our research in January 2021, new COVID-19 infections were at high levels in North America, South America, Europe and India. Pharmaceutical companies Moderna and Pfizer had only begun the uneven vaccine distribution in the United States. COVID had started to mutate into new variants causing expert uncertainty around the effectiveness of existing and future vaccines. This was also a time of transition from one Presidential and Senate political party affiliation to another, with meaningful changes to COVID regulation, vaccination, and economic plans.



Virtual Events are Now a Mainstream Format

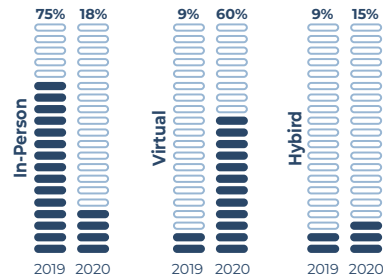
"We learned many valuable virtual experience and content delivery lessons in 2020 to help clients elevate and enhance their portfolio of educational offerings for years to come."

Colleen Bagnasco, CAE, CMP, Association Management Center

A virtual conference format is a viable format for most associations now and will be an important format option for the future.

Our research confirmed a conference format flip from in-person to virtual between 2019 and 2020. It's likely that many more would have participated in a virtual conference in 2020 if COVID struck just a little earlier.

COVID Flipped Format Attendance



2020 introduced many attendees to their first virtual conference experience with varying satisfaction. Association conference organizers, responding to gathering and travel restrictions, canceled their in-person events and thrust themselves into hastily-planned virtual conferences. Across the association industry, the quality of these conference experiences was mixed.

New virtual events also opened many associations to global attendees and more diverse domestic segments. For many associations, their 2020 conference attracted a record number of registrants. The virtual format creates a new venue for broad content distribution and a means to better serve existing members and attract new members.

I serve on many international committees and a virtual format allows me to attend many more.



Virtual conferences are now a viable channel to connect with global geographies still enacting pandemic travel and quarantine restrictions. New virtual event sponsorship and other monetization practices are developing that capitalize on the increased data these events generate and their ability to facilitate targeted one-to-one interactions.

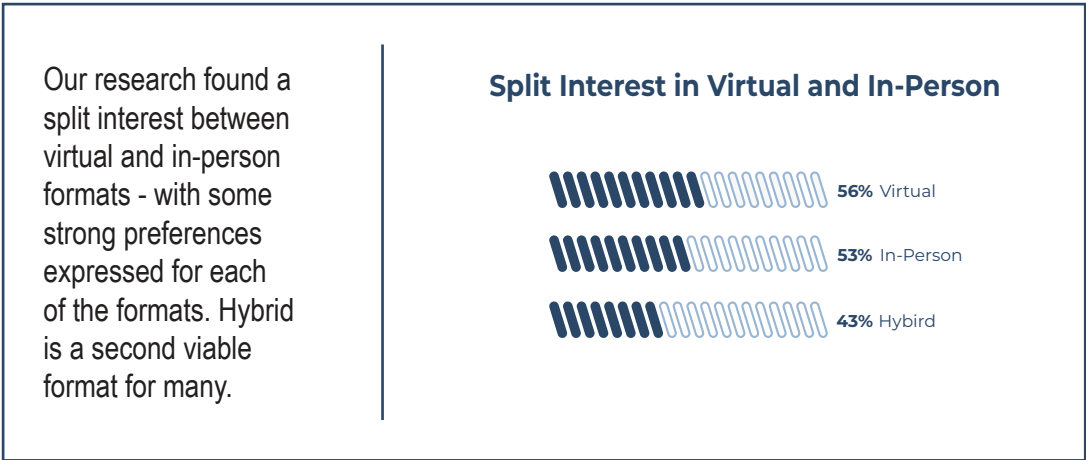


Associations should celebrate 2020 as a year of digital accomplishments creating a foundation for virtual event evolution. Conference organizers should continue managing the unique virtual event expense structure, creating new sponsorship avenues, and marketing the benefits of the format. Partnering with and soliciting input from members, sponsors, exhibitors, and other stakeholders will increase virtual event success.

Conference Format Preferences are Split

“Now we have two or three viable conference formats and we need to find the right mix to maximize overall attendance, member engagement, sponsor opportunities, and revenue.”
Stefan R. Bradham, CAE, American Health Law Association

Members and sponsors often publicly lament the loss of face-to-face conferences, but in the private survey confines many share an interest in digital formats.




Attendees shared divergent interest in the three formats. With roughly half interested in virtual or in-person, and hybrid seen as a fine backup alternative to some. While hybrid conference formats have a slightly lower interest than the other formats, only 20% of meeting attendees had recently attended a hybrid meeting. We attribute the lower interest to lack of experience and as hybrid meeting formats become more popular and are refined, we expect that interest will increase.

Attendees often commented on their personal preference for one format over another for 2021 attendance. Those that prefer virtual conferences typically remarked on the format’s safety or travel obstacles. Attendees that prefer in-person events discussed the energy of face-to-face networking or improved learning experiences. Comments related to hybrid events tended to consider the format as a variation on their preference; to most people hybrid is another way to attend virtually or in-person and not a differentiated format.

I am finally comfortable with virtual learning and connecting. ”

While attendees currently show approximately equal interest in all formats, their recent experience generally included discounted and free virtual attendance. For many associations, increasing the virtual conference registration fee while containing the virtual conference expense will be a core challenge for 2021.

 Associations should consider offering varied conference formats. Offering individuals different paths to conference entry creates relationship-building opportunities between association-and-members, peer-to-peer, and sponsor/exhibitor-to-member. Multiple formats also create fresh channels for revenue generation.

Employers Reduced Conference Financial Support

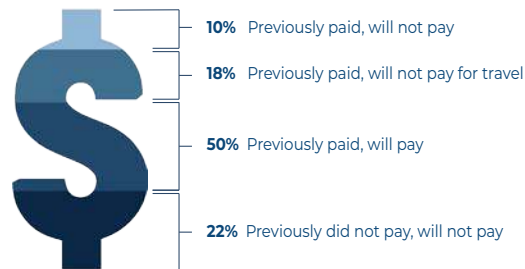
“Our members’ employer institutions are tightening travel budgets; so for now, at least, we are monitoring these budget decisions just as closely as the vaccination roll-out.”

Vicki Lindberg, Geothermal Rising

Employer payment of conference expenses became more restrictive, with a quarter of employers reducing their reimbursement

Our research unveiled 28% of employers eliminating or reducing reimbursement. Respondents shared a developing perspective that virtual events offer sufficient education without travel expense and time away from the office.

Employer Reimbursement



Employers traditionally pay for employee attendance at conferences and reimburse for travel, lodging, meals, and the event registration; corporate policies quickly shifted for the coming year. Our research showed that 78% enjoyed reimbursement in the past, but only 50% will be fully-reimbursed for corporate conferences and travel in 2021.

The sudden introduction of widely-available and acceptable-quality virtual events improved options for the segment of attendees that are reimbursed only for conference registration fees. For these people, the virtual conference is generally a welcome option that will likely move them from the in-person meeting to the virtual offering.

My employer reimburses the conference fee but not travel or hotel so virtual is better for me.



Association executives wrestling with in-person conference scheduling decisions and commitments should not focus solely on the health and vaccine landscape to guide their decisions. With 28% of attendees now working under reduced or eliminated conference reimbursement policies, in-person conference attendance will be depressed by budget restraints even when the United States achieves full vaccination.



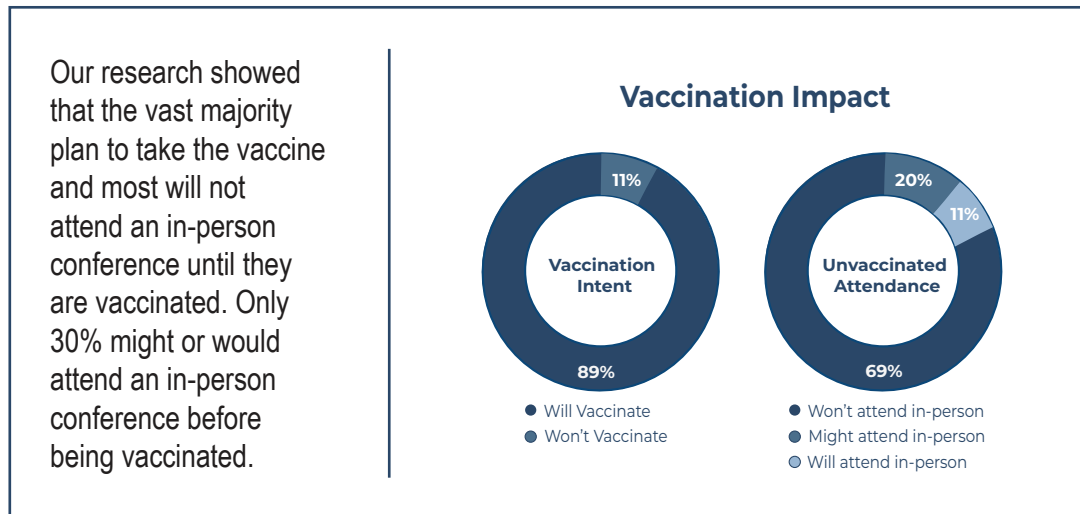
Associations should develop varied prices for in-person, virtual and hybrid meetings that capture the varied budgets and needs of their members and attendees. With these new and varied formats and pricing, associations will need to develop different attendance value propositions and sponsorship packages. Deep research into segmented member willingness-to-pay and preferences will best inform price point and discounting strategy.

Vaccination Affects In-Person Event Participation

"Who gets or doesn't get vaccinated is totally outside our control and completely unpredictable, so we have contingency plans to follow depending on the prevalence of vaccines at the time of our conference."

Kathy Hartness, CMP, CEM, Society of Naval Architects and Marine Engineers

Personal vaccination is an achievement that must be accomplished before most attendees will attend an in-person conference.




Beyond the influence of meeting organizers, vaccinations influence the in-person conference attendance decision for most people, with little variability among industries surveyed. Our research shows that nearly three quarters will not attend a large in-person event until they are personally vaccinated.

Until there's improvement in the uneven rollout of vaccines in the United States, associations must follow their members' local vaccine accessibility. With the understanding that vaccination access is somewhat unpredictable and most prospective attendees cannot confidently predict their vaccination date, delaying a conference by just one month will undoubtedly create a larger pool of potential in-person attendees.

I won't attend in-person events until I am vaccinated and the public is widely vaccinated.



Experts are uncertain how vaccine adoption will evolve as changing efficiency, distribution, access, and social pressures influence individuals' vaccination disposition. Populations of different demographics, professional industries, geographies, and political dispositions will decide whether and when to vaccinate at differing rates.

 Associations should develop broad meeting registration marketing campaigns and create last-minute registration opportunities. Understanding that the pool of potential in-person attendees has shrunk meaningfully from simple changes to employer reimbursement policies, associations will need to market to new targets audiences in new ways. Conference organizers should work with venues to revise performance obligations and identify last-minute lodging options to accommodate attendees who are recently vaccinated.

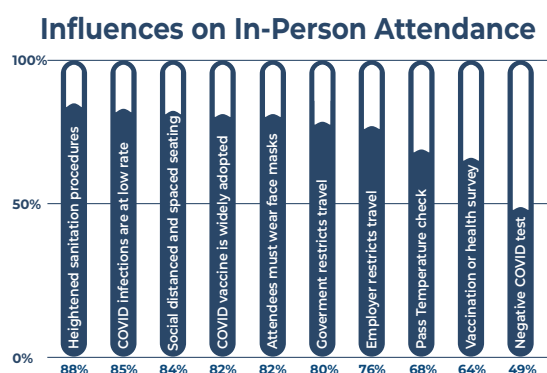
Venue Policies Influence In-Person Conference Attendance

“Future in-person conferences will need some combination of vaccinated participants and, at least for the foreseeable future, masking, cleanliness and distancing protocols.”

Chris Hunt, Infusion Nurses Society

Increasing the venue sanitization and safety protocols is more important than implementing personal health checks.

Our research explored venue policies that affect decisions to attend in-person events. We discovered easily-implemented practices that increase the likelihood individuals will attend an in-person conference.



Meeting planners and host venues possess an arsenal of in-person conference practices they can enact to increase the safety of attendees. However, these same policies and practices can negatively impact attendee convenience and conference enjoyment. Attendees showed much less interest in individual health testing practices (e.g. temperature checks) and much more interest in changes to the venue practices (e.g. increased sanitation).

Certainly, associations cannot influence the COVID infection or vaccination rates, though these environmental factors also greatly influence attendance. Conference organizers managing in-person events can expect these rates to fluctuate as vaccination distribution, infections, and variant spread evolve. Undoubtedly these rates will change even within the in-conference registration window.

It is important for hotels to follow the latest recommendations on sanitization and hygiene.



With new safety policies come new expenses. While most host venues now include extra sanitization as a complimentary service, other facilities may look to pass along increased costs to conference organizers. Any expense for on-site COVID testing will nearly always be the host organization's responsibility. Regardless of the mix of protocols enacted, meeting marketers promoting the event must ensure their communications clearly explain the practices to attract hesitant attendees.



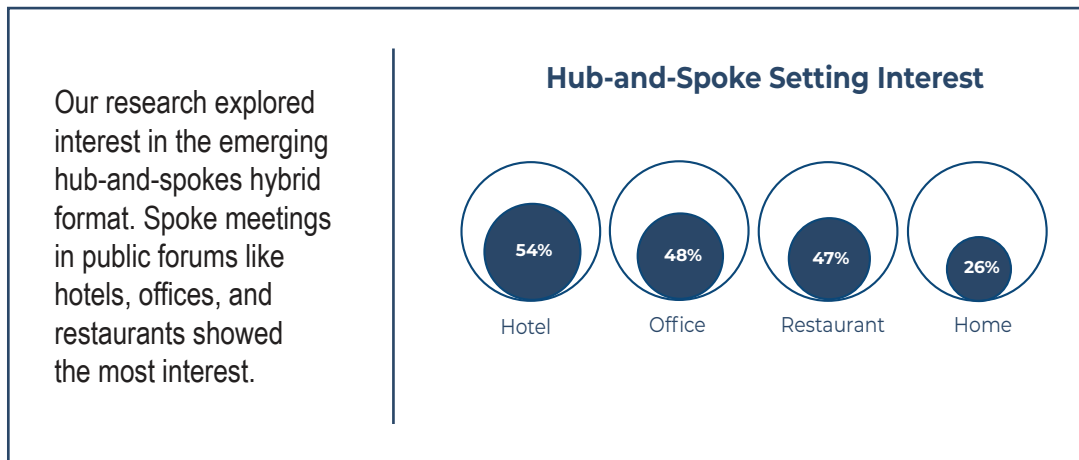
Associations should organize in-person gatherings with a proper attention to enhanced safety protocols. While implementing more protocols is generally better, those protocols create an incremental event expense to be managed and compounding the protocols can create a degraded experience for attendees.

Hybrid Hub-and-Spokes Are the Emerging Format

"I attended PCMA's Convening Leaders conference and look forward to ASAE's Annual Meeting. Both events use the 'hub and spokes' model. I would like to adopt this format if we can work out the global time zone logistics."

Barry Schieferstein, American Society of Nondestructive Testing

Hybrid conferences implemented through local small groups meeting in a pod are the viable new format for trial and experimentation.



Planners often define hybrid events as a simultaneous implementation of both virtual and in-person conferences, but the meetings industry is quickly establishing a distinct hybrid format that gathers small “spokes” of people to participate in conference content web-broadcasted from a hub. This format offers some of the networking benefits of a full in-person conference with the convenience, savings, and safety of reduced travel for attendees.

Association hybrid hub planners will need to develop many new processes when convening their first hybrid hub-and-spokes meeting. Organizations are still exploring profitable and efficient approaches to hybrid hub staffing, registration pricing, spoke locations, attendee experiences, and sponsorship opportunities.

Hybrid spokes could attract non-travelers that have never attended an in-person event.



Spokes may establish attendance caps to comply with local gathering size regulations. Participants may choose to create spokes close enough to avoid overnight travel. Spokes may meet at different times to accommodate different schedules. Importantly, spokes can choose to meet in different venue types, though potential attendees showed the least interest in private venues like a person's home.



Associations should carefully plan the expense, staffing, and volunteer coordination tasks for a hybrid hub and spokes event. Incremental expense and content requirements can be balanced by new and unique sponsorship engagement opportunities. The hybrid hub and spokes planning tasks complexity and volume will likely require assistance from a new breed of service providers developing expertise in this format.

Forward Thoughts

COVID permanently changed member meeting expectations and associations should not expect a return to the traditional and standalone in-person conference format. As associations migrate to their new mix of conference experiences we foresee a period of experimentation to meet shifting desires of attendees, attendee employers, speakers, and sponsors.

Managing the Conference Portfolio

Associations that diversify their conference into multiple formats should manage them with a portfolio strategy that defines unique positioning for each format. For many associations, an in-person conference can be defined as a premium option offering unique and exclusive features not available in the hybrid and virtual formats. Marketers should partner with conference organizers to clearly establish unique benefits, reasons to attend, and fees for each format.

New In-Person Venue Minimums

Early and transparent conversations about reduced attendance figures expectations with long-time conference venues will result in the best outcome for both parties. Associations can reshape their historic contractual terms with venues, including those agreements already in place. Associations should negotiate reductions to minimum performance damages, including room block guarantees and catering expenditures. Continuously advise your venue of registration counts and final in-person attendance projections.

New In-Person Sponsorship Approaches

The changed conference landscape undoubtedly requires a changed conference sponsorship offering. Associations should involve their top event sponsors and exhibitors to review future meeting plans and solicit input on sponsorship benefits. Associations should expect to evolve sponsorship opportunities frequently as all parties gather experience and better understand the format opportunities.

Guiding Decisions with Data

Associations should inform their conference changes with data collected from members and attendees. We are happy to offer the full and anonymous data set from our research as well as research for your organization. Please contact an author for details.

Thank You

While the road ahead remains unpredictable, associations have the power to recreate their meetings to fulfill the needs of their members, sponsors, and other stakeholders during this time of substantial societal change.

Thank you to the association leaders who supported our research. We appreciate your valuable observations and questions for our survey and this report. Some survey comments have been edited for brevity and clarity.



American Health Law Association



Association Management Center



American Society for Bioethics and Humanities



American Society of Nondestructive Testing



Association for Linen Management



Association of Biomolecular Resource Facilities



Association of Corporate Counsel



Association of Credit and Collection Professionals



Association of Healthcare Emergency Preparedness Professionals



Association of Pediatric Hematology/Oncology Nurses



Association of Rehabilitation Nurses



Computer Assisted Language Instruction Consortium



Community of Experts of Dassault Systèmes Solutions



Eclipse



Geothermal Rising



Human Factors and Ergonomics Society



Infusion Nurses Society



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International Society for the Study of Xenobiotics



National Association of Neonatal Nurses



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North American Neuromodulation Society



SmithBucklin



Society of Naval Architects and Marine Engineers



Survivors Network of Those Abused by Priests

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Chris is the Chief Consultant for Ricochet Advice, a consultancy serving professional associations. Chris helps associations leverage modern marketing technologies and strategies to build stronger connections to prospects, clients, and members. Previously, Chris was the first Chief Marketing Officer of the American Bar Association where he created a culture of innovation. At the ABA, he pioneered large-scale virtual events and developed the world's largest free virtual continuing legal education series, regularly attracting over 4,000 simultaneous virtual attendees from around the world.



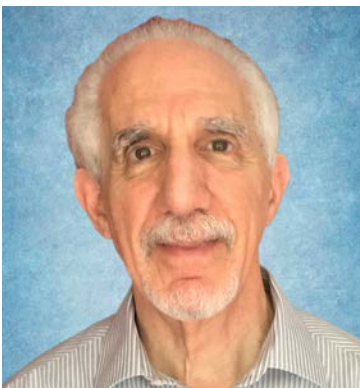
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Paul has spent the past 30+ years in various capacities and across the US supporting organizers of all types and sizes of conferences, conventions, and meetings. He first represented convention hotels in Orlando, Chicago, and San Francisco. Paul then transitioned to represent CVBs/DMOs in San Francisco, Nashville, and Sacramento. Since 2011, he has been associated with HPN Global. He and the HPN team support organizations' efforts with venue sourcing, site selection, contracting, and maneuvering through miscellaneous changes, opportunities, and challenges along the way.



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Bruce is the Principal of Bruce Rosenthal Associates, LLC. As a strategic advisor, consultant, and educator for associations, Bruce creates successful corporate partnership programs that increase revenue, add member value, and drive organizational growth. He is the Co-Convener of the Partnership Professionals Network, an organization devoted to improving corporate sponsorship and partnership programs.



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As event & conference organizers face challenges and opportunities, they'll benefit by adding to their team the expertise, networks, and resources such as those found at HPN. From venue sourcing/contracting to full-service meeting management and everything in-between, HPN can customize how-and-where their team will fit within and supplement an organization's existing event planning and production structure.

Bruce Rosenthal A s s o c i a t e s , L L C

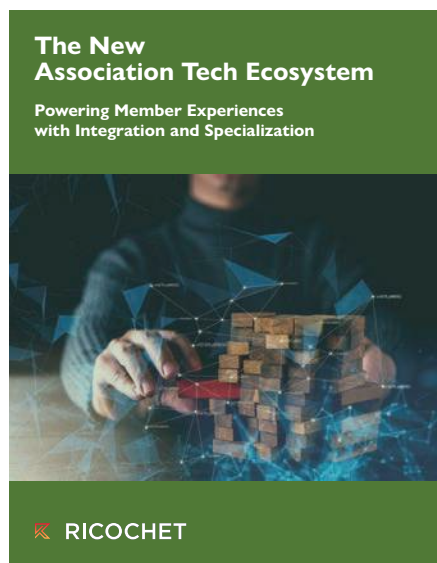
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Non-dues revenue from corporate sponsorships and partnerships has become increasingly important for associations and not-for-profit organizations as missions expand and member/stakeholder needs grow. Bruce Rosenthal is a strategic advisor, consultant, and educator for associations and not-for-profit organizations. Bruce Rosenthal Associates, LLC creates successful corporate sponsorship and partnership programs that increase revenue; add member/constituent value; and drive organizational growth.

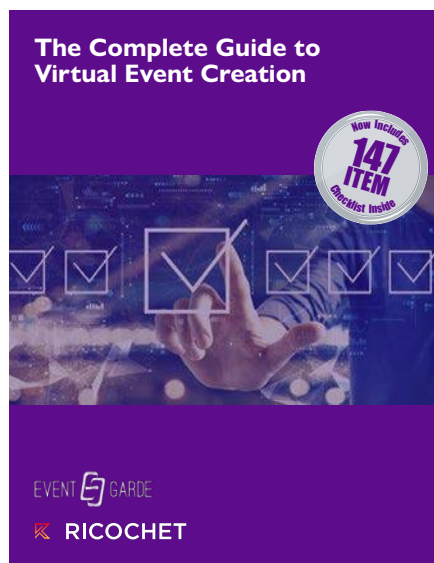
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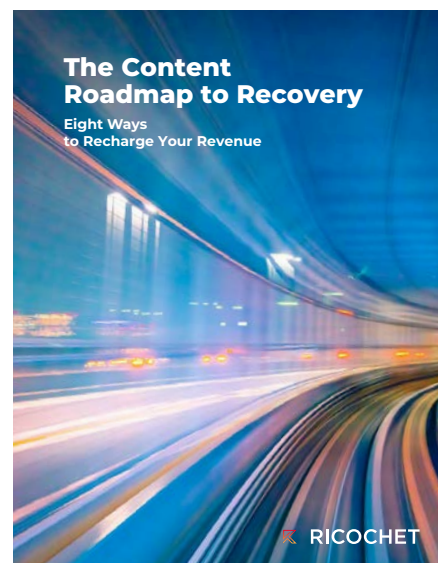
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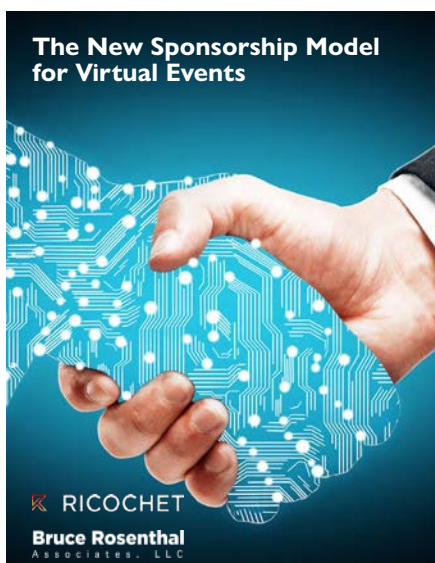
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