



CANADA\*

# Insights into the future of business events in Canada:

## A planner pulse check in the era of COVID-19

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# Executive Summary

## UNCERTAINTY REMAINS IN ALL MARKETS:

- UK planners are looking to hold events closer to home in the near term.
- US associations are motivated to hold their events in 2021 albeit hybrid and smaller in order to educate their membership and generate revenue. They understand that border restrictions and a lack of a therapeutic treatment for COVID-19 may reduce willingness to travel.
- US financial insurance sector planners are looking to 2022 and beyond for international business events. They are cautious about 2021 and have programs, but they are likely to move to domestic as it is an easier sell. International programs are anticipated to take longer to restart.

However, the opportunity for destinations to connect with planners remains, as researching new destinations and being up to date on safety and restrictions is important to all planners in all markets.

Planners want to hear from Canada with relevant helpful information that will make it easier to reschedule events in 2021 and for new events to be researched for 2022 and beyond.

Planners in all markets are committed to having face-to-face events. Business events are predicted to resume in hybrid format towards the end of 2021 and into 2022.

## PARTNERSHIPS BETWEEN DESTINATIONS AND ORGANIZATIONS WILL BE KEY:

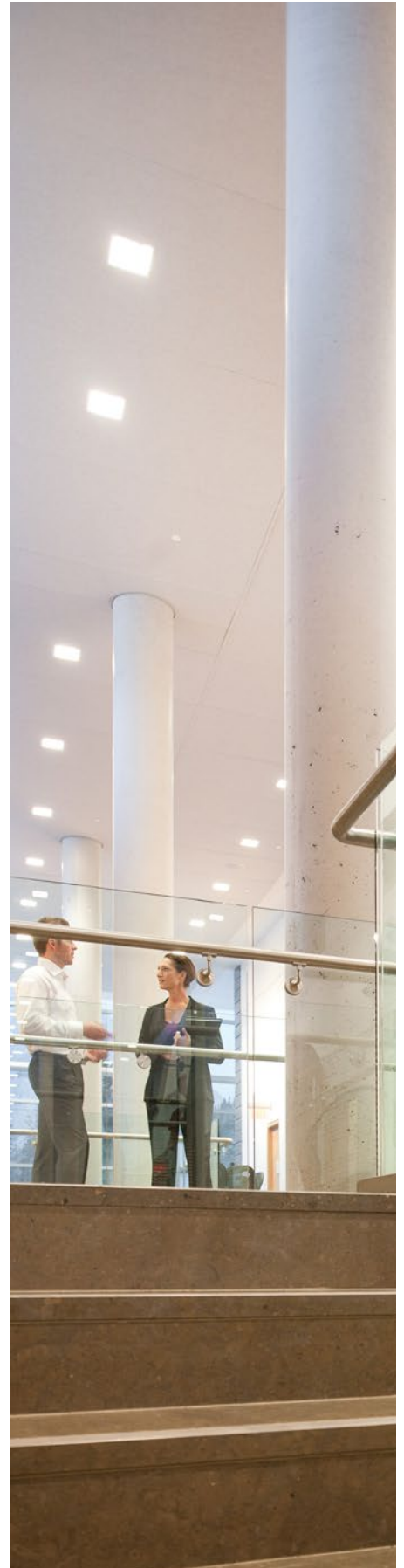
- Adapt venue business models – no more ratio of rooms to meeting space, as it is no longer feasible.
- Have packages ready to offer to make hybrid events easier – have technology and production offerings.



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Destination Canada's Business Events team is charged with growing Canada's share of international business events by promoting the country's unique meeting, convention, and incentive event possibilities.



# Section 1:

## UK business event organizer pulse check



### Introduction

Between September 4 – 30, 2020, Destination Canada conducted a series of online surveys targeting event organizers from the United Kingdom representing the association, corporate and incentive market segments through the [Meetings & Incentive Travel \(M&IT\) Magazine](#) readership, a leading business events publication from the UK. We received a total of 91 complete responses with key findings enclosed.

The objectives were to update signs of recovery gained from Destination Canada's international August surveys, and gather opinions on the expected changes on business events induced by COVID-19, including:

#### OBJECTIVES:



**Key factors that will influence the future of business events.**



**Focus and considerations for future planning.**



**Predicted timing and approach to international business travel.**



**A clear indication of the support required for events to return to meet in Canada.**

## Key Highlights

Although significant uncertainties exist, planners are motivated to hold meetings once international travel resumes. While Canada is well positioned as a potential destination, it is critical to remain engaged with planners by keeping Canada top of mind and to provide information that will facilitate booking decisions, particularly information about health and safety measures, innovations, and leadership in thriving economic sectors.

### Uncertainty remains, destinations that are close to home are top of mind:

- **Most of the respondents are focusing on locations within their own countries or close to their European headquarters being closer to home and more regional in scope in the short term.**
- There is a lot of uncertainty about when international meetings will resume, and it is likely that they will not happen until later in 2021 and beyond. These findings are consistent with other surveys such as PCMA and NorthStar Meetings Group, whose findings state that national and regional events will resume first. It is important to note, large meetings and events in the UK are also restricted until March 2021. Current restrictions allow for events of 30 people with social distancing being maintained.

### Focus continues to be rebooking however planners are continuing to research business events:

- Primary focus for many planners (46%) includes rebooking their business events into 2021. However, a large proportion (38%) are focusing on researching for future events.



### Opportunity for Canada: continue to create awareness and keep Canada top of mind through marketing and business development relationships for 2022 and beyond.

- Those who are researching further out (2022 and beyond) and looking at new locations are open to international destinations, but currently not ready to commit to contracting.
- **In the short term, while Canada is strongly represented among destinations where they either have booked meetings before or will consider in the future, Canada and the USA present challenges for European clients due to the COVID-19 situation and being a long-haul destination.**

### Opportunities for marketing to keep destinations top of mind during planner research:

- Post pre-COVID-19 conference testimonials.
- Review Search Engine Optimization (SEO) for general internet search.
- Continue marketing in BE trade and travel publications.
- Find ways to show destination experience virtually, such as an activity you can all do together on a virtual platform that represents your destination experience or attractions.

### Communication lines are open: opportunity to continue reaching out to provide relevant information:

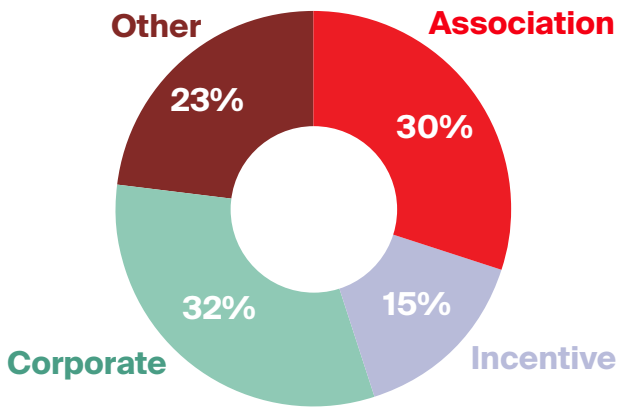
- Planners are happy to hear from supplier partners that have relevant information to ease their work. **Information about current safety measures in destinations to allow the return of meetings and local government regulations with regards to travel are top of mind.**
- While information about safety measures is most important, many **would still like to hear from Canada on how Canadian innovation and leadership in thriving sectors can help their association or corporate membership rebound from COVID-19.** Additionally, they are also looking for inspiration for incentive programs.

## Profile:

The responses that we received from the event organizers in the United Kingdom (UK) were very much representative of the demographics and their geographical location.

A larger number of the participants were either corporations or agencies working within the corporate & incentive segment. Life Sciences, Technology and Financial sectors are the three most widely represented industries. The majority of respondents generally hold meetings internationally.

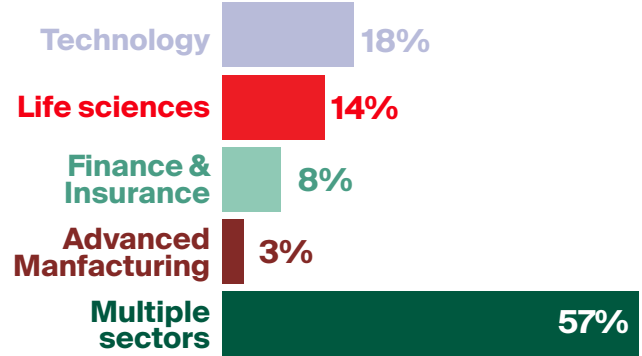
### RESPONDING MARKETS



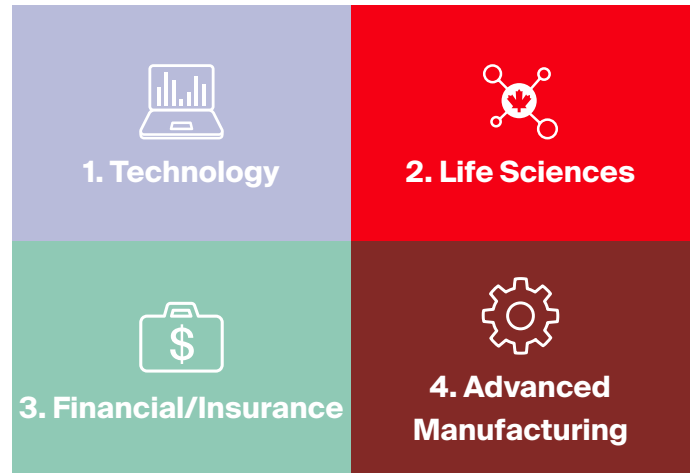
Nearly all (93%) planners were based in the UK.

### TOP SECTORS IDENTIFIED

#### ECONOMIC SECTORS



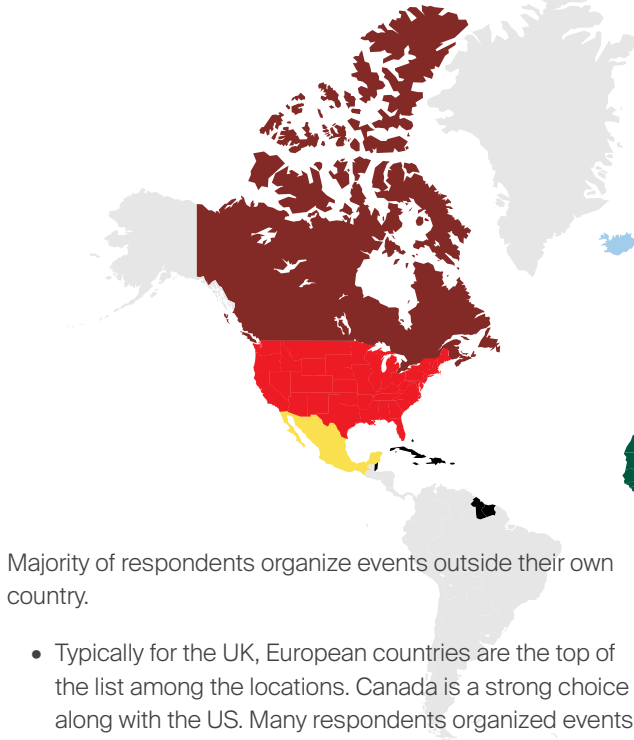
- The majority of Corporate/Incentive participants work with a variety of sectors.
- Majority (about 57%) segments represented from a variety of sectors
  - Primary sectors represented are:



None identified with agribusiness, or natural resources/clean technology.



## Countries booked by organizers for international business events



Europe:	95%	Canada:	44%
UK:	69%	Africa:	30%
Asia Pacific:	55%	Middle East:	36%
Mexico:	18%	Caribbean:	10%
US:	67%		

Majority of respondents organize events outside their own country.

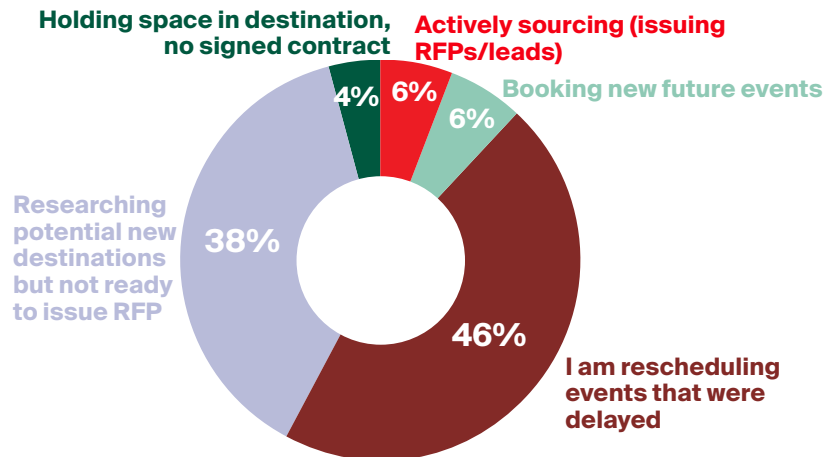
- Typically for the UK, European countries are the top of the list among the locations. Canada is a strong choice along with the US. Many respondents organized events in Canada before and will in the future.

## Recovery Signals: rescheduling contracted events

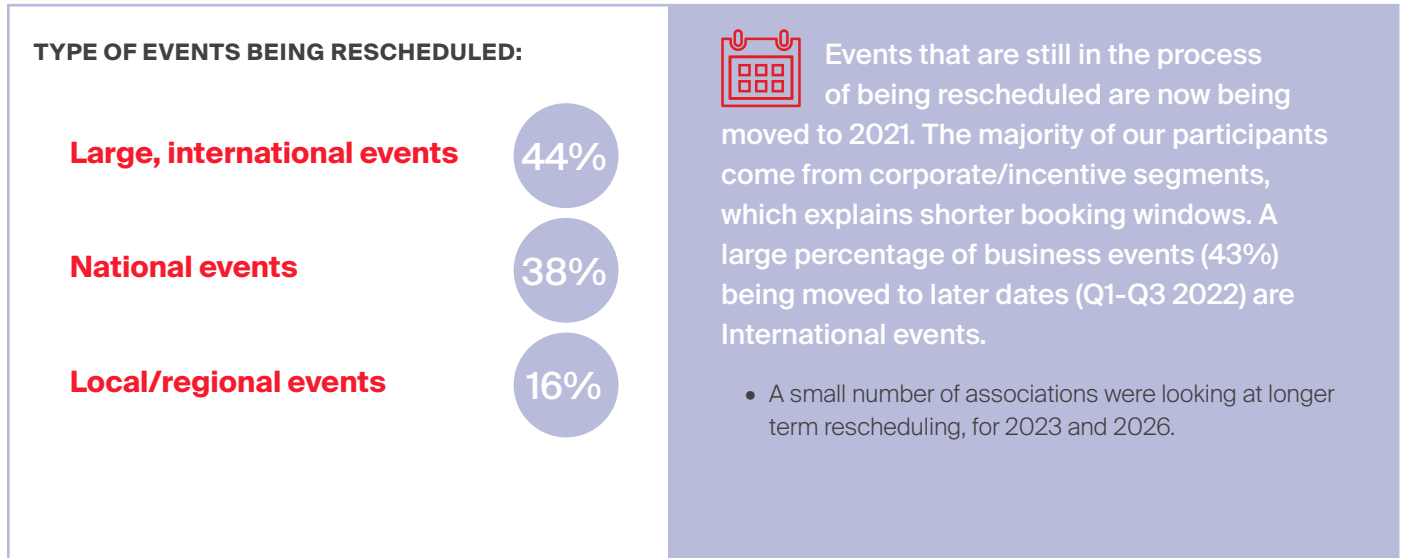
Nearly half of respondents are still dealing with rescheduling previously booked events. However, there is a **shift towards researching new destinations for future events and sourcing RFPs**. A signal that Canada needs to continue marketing efforts to keep Canada top of mind.

Booking and confirmation of new events remains low while planners rebook and research destinations.

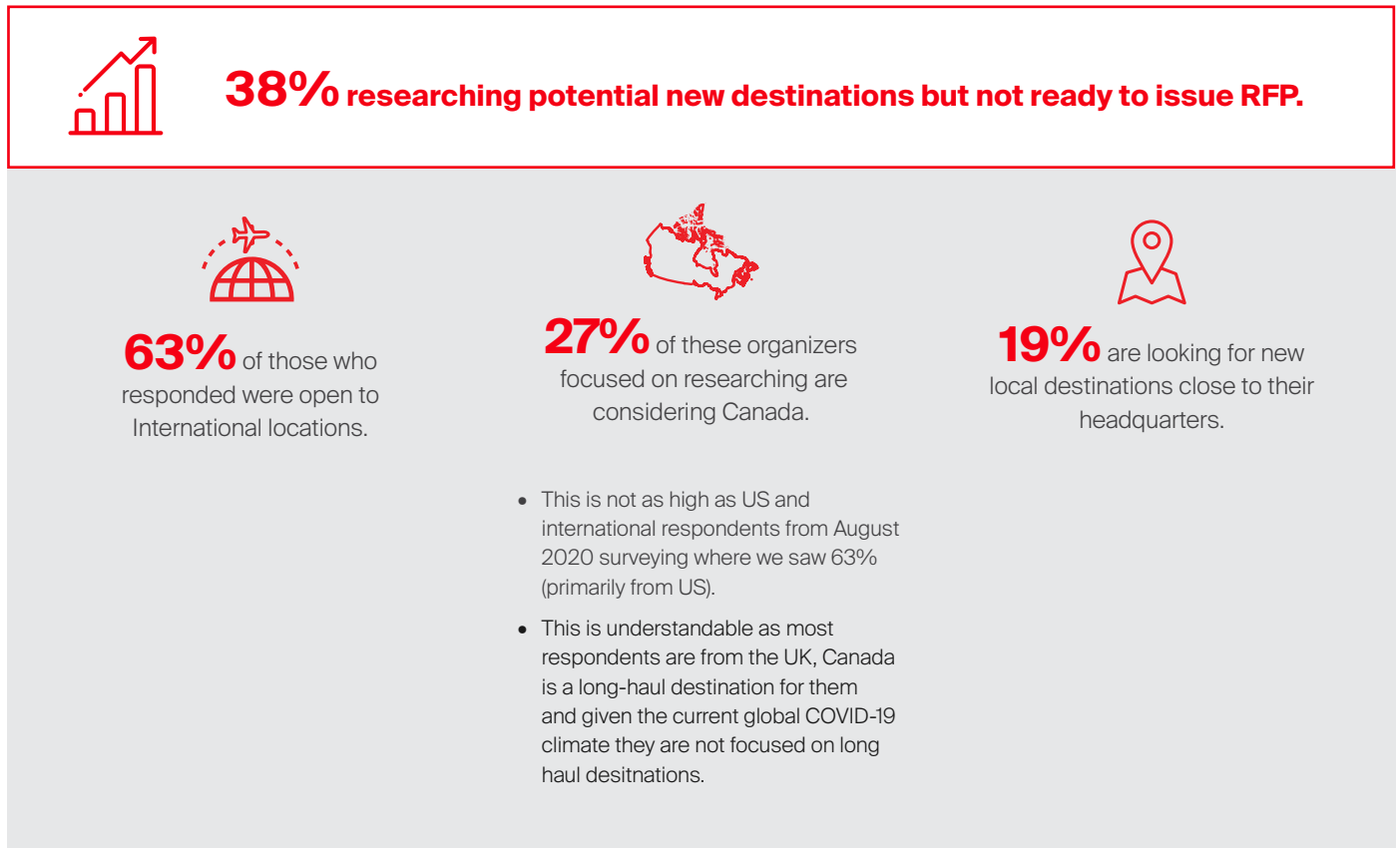
### PRIMARY FOCUS:



## Primary Focus: Rescheduled events



## Primary focus: Researching





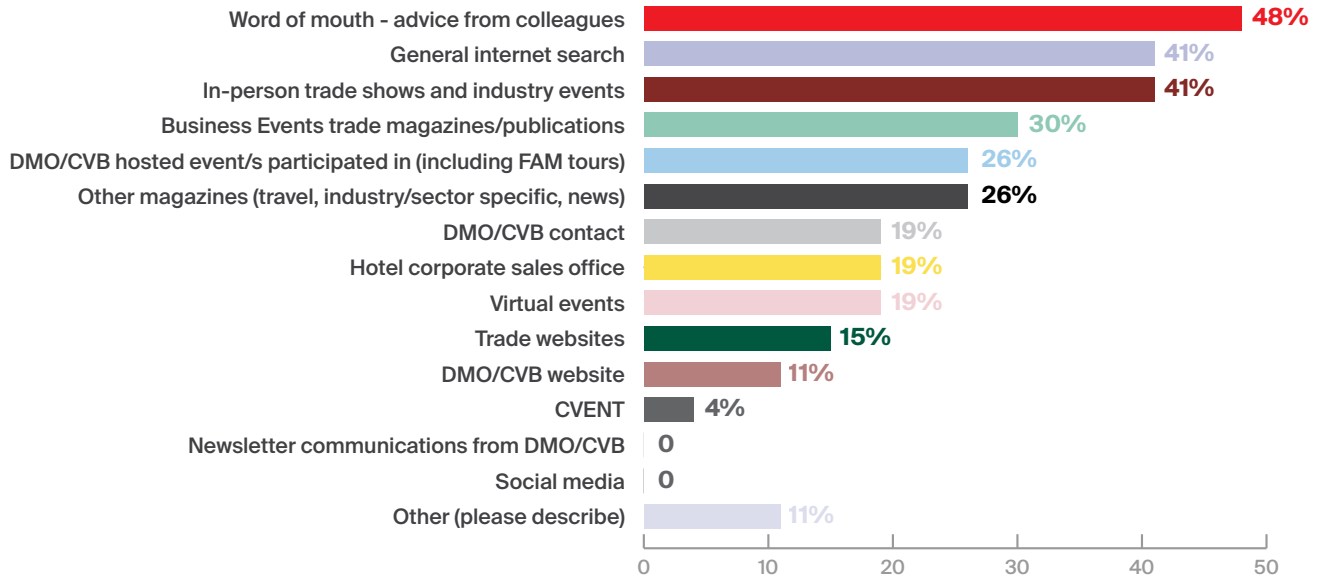
## Seeking Recommendations:

The UK audience favours word of mouth, industry in-person trade shows and events, internet search, business events trade publications and DMO hosted events as ways in which planners research new destinations.

While planners are researching and we wait to meet with them in-person again, there are opportunities for marketing to keep destinations top of mind during their research:

- **Post previous conference testimonials:** word of mouth and advice from colleagues is key in seeking destination recommendations. An opportunity while you are checking in with past planners during this time – ask for a testimonial.
- **Review Search Engine Optimization (SEO):** since general internet search scores are high, keep your search ranking high/improve your search ranking.

- **Continue marketing in BE trade and travel publications:** provide interesting stories – planners are reading!
- While in-person familiarization tours hosted by destinations are important, finding ways to show destination experience virtually should also be considered. For example, an activity you all can do together on a virtual platform that represents your destination experience or attractions.
- There is hope that we will be able to meet again to showcase that destinations in-person trade shows and events are important, with 41% of planners turning to them as a resource.



## Staying in touch

Lines of communication are open - 46% of UK respondents are ready to hear from international destinations, while a further 24% are neutral.

### DMO INFORMATION/RESOURCES OF INTEREST:



The majority are looking for destination information – specifically what's new and what's open in destination.



Close behind is information on safety guidelines and regulations in the destination.



Information on the delegate journey is top of mind for most.



Experiences and activities, as well as economic sector innovation, scored lower when presented with these five options. This did not defer by planner segment (association/corporate/incentive).

### TOPICS OF INTEREST FROM PLANNERS ON CANADA:



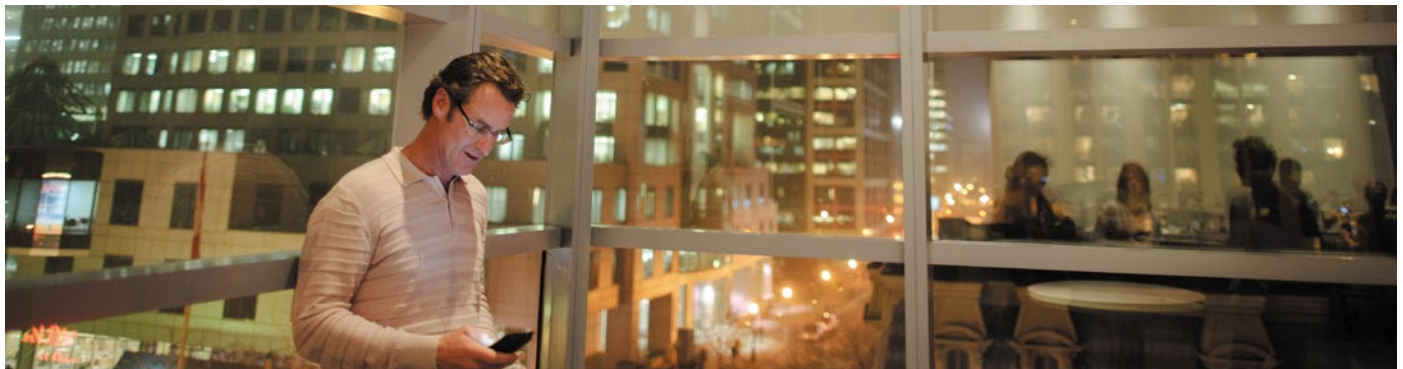
Not surprisingly, at the **top of the list was safety guidelines/health measures on the safe return of in-person events** (100% of those that responded).



Many (69%) would like to hear about how Canadian innovation and leadership in thriving sectors can help their association or corporate membership rebound from COVID-19.



Planners are also keen on **learning about new incentive rewards/experiences** to help motivate and rebuild corporate culture and strengthen teams.



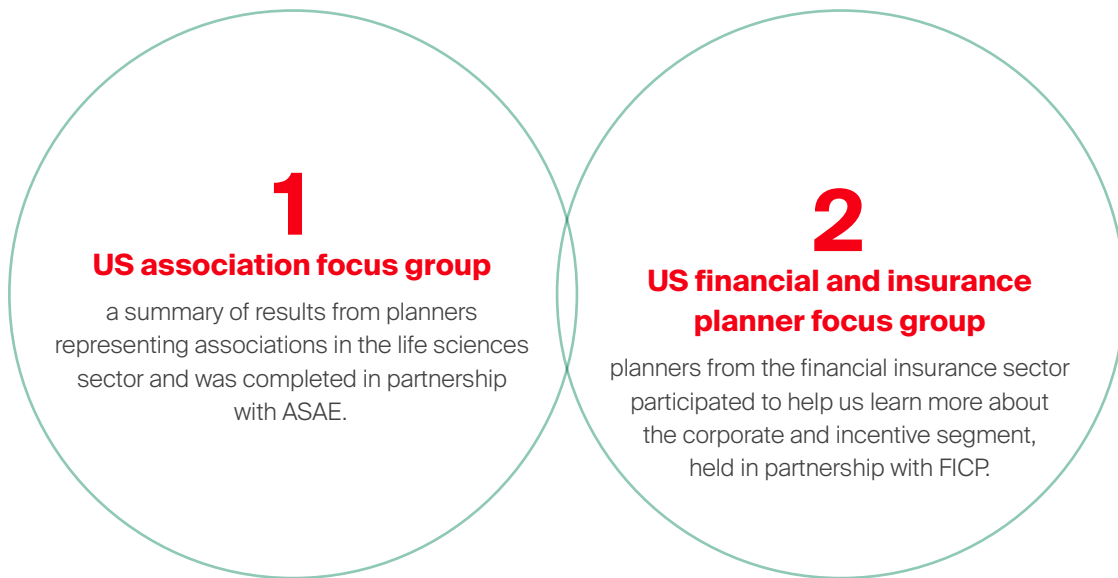
# Section 2:

## US Focus Groups: Focus groups in partnership with ASAE and FICP



Opinions from US business event organizers in two virtual focus groups representing associations, corporate and incentive segments.

Findings are separated into two sections in this report:



The objective was to update insights gained from focus groups conducted in May, and look for signs of industry recovery.

### OBJECTIVES THAT WERE DISCUSSED:



Key factors that will influence the future of business events.



How the organization plans have been affected by COVID-19, how can we help get them back on track.



Anticipated changes to the buying cycle, considerations for future planning.



Predicted timing and approach to international business travel, how to create trust in travel for delegates.



What support is needed in order for events to return to meet in Canada.

# Focus Group 1: US Association Focus Group

## Background

In October 2020, through a partnership with the American Society of Association Executives (ASAE), a virtual focus group was facilitated with ten participants targeting life science event organizers to seek their insights and opinions on COVID-19 and industry recovery.

## Key highlights

- Some optimism for hybrid business events in 2021:**  
 Many organizers have business events scheduled for 2021 outside the US (including Canada) and are hopeful they will be able to have these events as a hybrid. However, **considerations for events going ahead:** travel restrictions, vaccine/treatment and ability of members to travel as healthcare professionals.
- Greater reach through virtual means is seen as a lasting benefit:**  
 Virtual and hybrid events have brought a greater reach in audience to organizations, including those who may not have travelled before and are now able to participate. Associations want to be able to continue to reach this audience; therefore the virtual component is here to stay. On demand engagement is extremely popular and allows consumption of content when the delegate wants. This hybrid/virtual component of reaching more audience members is a positive impact that COVID-19 has created that will become a permanent model in future.
- Facing revenue shortages:** one of the main pain points with virtual events is the revenue loss from the exhibit hall. This is a major revenue generator for associations, and as we move forward into the hybrid era, they will need assistance to understand how to strengthen their sponsor revenue - especially if hybrid meetings increase their event costs.
- Live hubs and importance of value proposition:**  
 conferences are shifting to the hybrid model, and in the near term these live hubs (less than 100 delegate events) will need to provide networking opportunities and unique content that the delegate cannot get online to strengthen the value of attending a business event in person.
- “Out of the box” experiences are key:** planners are still researching experiences. They want to learn about the ‘out of the box’ experiences that can be presented and shared on virtual platforms during their events, which provides excellent marketing opportunities for destinations while we wait for in-person events to resume.

## Destination takeaways

- Adapt business model:** Destinations/venues that still base their business model on rooms to space ratio need to reconsider, as this is not feasible moving forward with less attendance and social distancing requirements in place.
- Partnerships will be key:** have packages available (production, a/v, services, etc.) so the event organizers do not have to source separately.
- Provide virtual destination experiences** so that the virtual audience in a hybrid event can experience the destination flair – the virtual audience will come back to that destination as a leisure visitor.
- Provide the new and now floorplan/specs** on how events can take place in your venues with all the health and safety measures in place.
- Give testimonials or examples of events** that have been held, and what they look like now.
- Outdoor spaces are in demand** and should be featured in content provided.

## Summary of focus group discussion

### ASSOCIATIONS ARE STILL OPEN TO MEETING OUTSIDE THE US

- Planners will continue looking to hold meetings outside the US. **Assuming borders are open, they continue planning events in 2021 and beyond that have a live face-to-face component, either fully or in the form of hybrid events.**
- Beyond 2021, they are hoping to come back to destinations where they had to move or cancel meetings to make up for the losses and stay loyal; **this includes Canada.**
- Budget restrictions for travel/conferences to conferences will be challenging.
- **Uncertainty remains on the border closure and what is going to happen generally with containment of the virus and a vaccine or treatment to allow their members to travel.** This uncertainty is a strong influencer. Associations that have confirmed events in Canada and other locations in 2021 expressed wanting to have these events as a hybrid in 2021 if they are able to. However, they expect these to go virtual or cancel. Some organizers are still dealing with moving events to later dates and running into challenges with finding availability.
- Finding insurance for 2022 and 2023 is an issue right now.

### EVENTS ARE EVOLVING TO HYBRID EVENTS:

- 2021 is shaping to be mostly virtual or hybrid, and hoping to go back to face-to-face, including in Canada in 2022-2024. This highly depends on travel restrictions for health professionals in these life science associations.
- **Virtual events are here to stay because they allows participants to consume the content that the delegates want, when they want it. This year shows preferences for “on demand” versus live content. Virtual events also allow for a broader audience and those who may not have travelled before, or those with limited budget, will now be able to experience the content.**
- There is potential to shift from “city” meetings to “resort” meetings as more open spaces and outdoor experiences will be sought after. If the destination is appealing, delegates will want to go.
- **Virtual events can be used as a platform to promote destinations. Destination Marketing Organizations (DMOs) can work with the organizers of virtual events to include destination information curated for virtual format to their delegates, because those can potentially become leisure travellers and will want to explore the destination on their own.**

- Face-to-face meetings will never go away. Even though they may become smaller, they will remain relevant - especially for some groups like physicians who receive a lot of peer-to-peer knowledge through networking during live events. **Virtual events cannot provide a substitution for that type of interaction.**
- There is potentially an emerging trend of hosting smaller, live faceto-face meetings regionally (with 100 or fewer delegates) that are called “live hubs” to allow for that in-person networking.
- **To entice delegates’ attendance, the value proposition must be strong.** Events will have to be able to offer something that cannot be acquired via virtual platforms; and that has to do with networking and destination experiences.



Associations business overall will always be stable, whether it is a sellers or buyer’s market; we will always have face-to-face meetings and there will be a need for destinations and space.”

- Budgets for travel are being impacted, professionals will be very selective on what to attend face-to-face and how many people in a company can be sent to a conference (one person to a live event versus five to a virtual event, which is more beneficial).
- **Vaccine is anticipated to provide more comfort for travel in general and for some is a crucial factor, but for others it’s not as critical as long as safety measures are in place;** it is up to individuals to take that risk.

## COVID-19 affecting associations' bottom line:

- Organizations that have been largely relying on events as revenue generators need to find ways to stay financially viable. If there are no events, organizations must invest in technology to be able to provide education online, otherwise they will not retain members who joined for the sole purpose of receiving that education via events.
- Meeting teams are undergoing significant transformation. **Planners are quickly having to learn new roles and are transforming from meeting planner teams to production teams;** everyone is learning and embracing technology.
- The association boards need to stay more flexible and open to adopting change – a face-to-face event cannot simply be made virtual - the concept is different, and the format and delivery must adapt.
- **Exhibitor and poster component of events proved to be most challenging:** various virtual platforms, including gaming platforms are being used to draw attention to exhibitors; none proved as effective as face-to-face attendees did – a meaningful connection was not made between the delegate and exhibitor. It is important to find a creative solution moving forward. **Associations want destinations and suppliers to help solve this.**
- **Where the exhibit component is crucial to the event, planners noted significant loss in revenue and a challenge of recovering along with concern over what to do next.**



Planners were complimentary of experiences with Canadian destinations during this evolving COVID-19 situation. Canadian destinations proactively investing in production solutions was seen as a great step.”

## What destinations and venues have to think about at this time:

- **Destinations that still base their business model on rooms to space ratio need to reconsider; an industry-wide change needs to occur moving forward.**
  - **There will be more demand on physical spaces and planners will not be committing to larger blocks as they used to before.**
- **Venues and conference hotels need:**
  - To reinvent how they use their rooms/meeting spaces.
  - In-house production studios fully equipped and with expert staff.
  - Additional investment into proper infrastructure to support hybrid events, such as a much broader Wi-Fi bandwidth – and to not increase those costs exponentially.
- **Contracts will look different and many clauses will need to be reconsidered and reevaluated.**
  - Additional safety/sanitation services need to be covered by venues; **the venues should not expect associations to cover these additional costs** – for example hand sanitizer is not going to be an added expense, rather it is part of the venue's own precautions and available during the conference.
- **“Partnerships” between planners, suppliers and providers are taking on more meaning than ever, we all need to rely on working together more moving forward.**
  - Destinations that make it easier to work with them and are flexible will be remembered and planners will come back.

**TECHNOLOGY:**

- Planners look at virtual platforms as their venue now; meeting staff are getting certified in new technology to be able to design and manage events and not rely on technology providers.
- **Challenges:**
  - **Technology providers often present themselves as experts on virtual events, but they lack knowledge of event design and management; it has been a trial and error this year.**
  - Planners must use multiple providers for different aspects of running one virtual event and the staff need to be fully trained to ensure the event runs smoothly – this could also translate to hybrids and needs a solution.
  - **Venues need to have partnerships with technology providers. Offering a “package” deal to associations when booking an event would be ideal.**

**Relevance of economic sectors’ presence in influencing destination choice**

- Planners are aware of many destinations having Ambassador Programs, which has become a very common trend in the business events industry. However, they do not find it essential if they have established local relationships with colleagues already.
- Those who have active members in the destination will tend to go back to that destination to support them. They often rely on their help with facilitating event organization and hosting, and hope locals can help with driving more sponsors and exhibitors.

**How can NTOs and DMOs support during this time to help planners rebound and recover**

- **Be better partners:** offer full pre-negotiated packages to choose from where planners do not have to look and secure/negotiate everything themselves. Most of these comments related to virtual/hybrid event platforms, production studios, etc.
  - Pitches can no longer be about selling the space.
- Canadian local production companies are phenomenal – it is important to discover who these companies are and to feature them in your destinations and create stories.
- **Planners are still looking and want to learn about the “out of the box” experiences that can be presented and shared on virtual platforms during their events, therefore providing excellent marketing opportunities.**
- Provide new floorplans at venues with proper seating arrangements with distancing.
- Provide pictures of any events that are taking place now and what they look like.
- Outdoor spaces are in demand and should be featured.



## Focus Group 2: US Financial and Insurance Planner Focus Group

### Background

In October 2020, through a partnership with the Financial Insurance Conference Professionals (FICP) a virtual focus group with five participants was conducted to seek insights and opinions on corporate and incentive programs.

The objective was to update insights gained from focus groups conducted in May and look for signs of industry recovery.

### Key takeaways

- **Looking to 2022 and beyond for international business events** - cautious in 2021, have programs but likely to move to domestic as it is an easier sell, international is further out.
- **Consideration Factors:** Corporate offices need to be open to plan future events, after US election will also influence decisions.
- **Incentive programs:** Qualifiers to stay the same – the value of travel remains a big reward.
- **Planners are committed to face-to-face events;** virtual incentive travel just does not work.
- **Marketing: Brag about bucket list activities:** need more awareness about Canada's incentive product.



Domestic travel will come back first and is an easier sell for many reasons – safety, ease of travel; right now it is not about where I want to go but where I feel comfortable going; domestic US is where clients will be looking first.”

### Summary of focus group discussion

#### ORGANIZERS ARE STILL OPEN TO MEETING OUTSIDE THE US

- **“Sitting idle”** is a term that planners referred to during the session: waiting for things to evolve one way or another so that their executives could start making decisions and teams could start planning. Right now, the primary focus is to get travel moving locally and have clients committing to travel; until this happens, planners are not able to do anything. No clear idea when this will change.
- **The group generally agreed that 2021 will most likely be virtual or stay domestic when travel resumes.**
- **Decisions to stay close to home are common across this sector even moving into 2022;** those who have events booked in Europe in 2022 are waiting until the beginning of 2021 to decide, which is related to COVID-19 and the US election outcome.
- Some planners note that they try to keep soft dates and maintain flexibility with earlier part of 2021 – they anticipate having to move their Q1-Q2 events to later in the year.
- Offices are closed and teams work remotely, which significantly impacts their ability to plan and execute events. Even if events can go face-to-face sooner, teams need to be there in person to manage and some have policies to remain fully virtual in 2021.
- **If possible, give examples on hosting events and incentive programs - learning about any travel/program activity happening is helpful to get planning and events moving.**
- Planners will not relocate international events to North America unless it becomes domestic.
- Destinations are selected for specific reasons and need to happen in those regions.



## COVID-19 impacts to companies and business models



General feeling of planners was that they are uncertain with business models that are also waiting for something to change - the US election will influence business decisions. However, **everyone is waiting for face-to-face meetings to return, and this sector is committed to face-to-face; virtual incentive travel just does not work.** There is an opportunity for Canada and its partners to continue nurturing their planner relationships as there is much hope for the return of events.

### QUALIFIERS:

- **Qualifying process for incentive travel stays the same;** those who qualified to receive awards and invited to travel in 2020 will be moving to 2021 and so on. It will be up to the individual to decide if they feel comfortable or want to participate in an incentive reward program.

### CREATIVITY:

- **Planners must be more creative and resourceful to keep travel rewards programs going including:**
  - Buyout of resorts to maintain more safety.
  - Splitting large groups into smaller groups.
  - Spreading out the programs over time.
  - Adding virtual elements where possible.
- **Corporate offices:** Planners anticipate continuing to work remotely – before COVID-19 executives were not in favor of remote working, but COVID-19 proved it can work and in for some companies it may become permanent practice, so offices will continue to shrink or eliminated all together.

### BUDGET:

- **Budgets will be the same, however some comment on having to increase budgets in the future in anticipation of additional expenses.** Some examples of these increases due to the evolution of event requirements for health and safety: more space and seating arrangements to maintain distancing; more Food & Beverage expenses due to an alternative to buffet options; more décor for more seating; more transportation due to vehicles needing to be less occupied, additional safety measures that may cost more, more staff, etc.

### MORE RED TAPE:

- **Legal departments are playing a bigger role in contract reviewing. This is significantly slowing down decision process. Instead of generally six weeks it now takes up to three months to finalize the event and have contracts reviewed and signed.**



## Program activities

- Exchange rate is not a decision factor – just a nice perk to have, but not relevant.
- Activities the financial and insurance planners include in their programs:
  - Anything unique and outdoor that you can do - nature hikes, zip lining, etc.
  - Warm climate activities, resorts are very popular.
  - Beach destinations are more popular where you can relax, versus cities with walking/touring considered as work.
  - European cities’ programs are popular.



One planner who is a big fan of Canada and has done many programs in Canada shared her experiences:

- No other country (outside of the US) has as much variety to offer as Canada.
- People are fantastic, scenery is breathtaking, and service is stellar.
- Smaller cities are incredible: example experienced an amazing food scene.
- Winter outdoor experiences are incredible.
- DMCs are sophisticated and easy to work with.

## Marketing opportunities for destinations

### To get in front of decision-makers:

- Provide short promo videos of experiences.
- Testimonials from other similar groups.
- **Showcase bucket list destinations/activities.**
- **Continue with familiarization/education trips – it only takes one visit to dispel pre-conceived ideas or unknown destinations.**
- Education is key - provide more.
- Nation-wide promotional campaigns (a participant mentioned example of seeing destinations on TV and were helpful to know golf experiences).
- **For Planners Instagram is huge** – it is fast content, has more images; planners do not want to read, but want to see more pictures and experiences in action.
- **For C-suite decision-makers** – do not use social media; Executives still read Travel & Leisure and similar upscale magazines for ideas.

## Opportunity for Canada:

- Provide more education on Canada’s incentive destination product – planners were not well versed on Canada’s experiences.



One planner found the following resources helpful for ideas on Canadian content: Condé Nast, Explore Canada, Parks Canada and Destination Canada’s Signature Experience: Incentive Canada

## How can NTOs and DMOs support during this time to help planners rebound and recover:

- Provide information on implemented safety measures in destinations.
- Provide information on the local government regulations or restrictions with regards to travel.

# Next steps

We thank the survey respondents and focus group participants for their time in sharing their answers to our questions to provide us with an understanding of their current situation and how business events are evolving through COVID-19.

We will continue the conversation in upcoming surveys this fall and share these findings as part of Canada's Response, Recovery, Resilience plan for COVID-19.

## Contact



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