



STATE OF THE INDUSTRY: LIVE, DIGITAL AND HYBRID EVENTS REPORT 2021

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A digital revolution?

As the events sector re-emerges from the disruption and difficulty of the pandemic and successive lockdowns, we are witnessing a new landscape taking shape. The world of events has been changed forever, with discussions around the rise of digital and hybrid, and the scaling back of live, dominating the agenda. So what is the lasting legacy of the coronavirus on events?

Sentiment on whether hybrid and digital events will continue, and whether they will be favoured over live, is divided. For this state of the industry report, made possible with the support of our headline sponsor Cvent, we surveyed event planners working across a range of industries, including the government, association, non-profit and education sectors, to determine the effectiveness of hybrid and digital, concerns over these formats, and best-practice tips.



Live, digital or hybrid?

When asked what percentage of their events over the past 12 months had been in live, digital and hybrid formats, most planners (71%) said that only 0-20% of their events have been in a hybrid format, and 54% said that between 0 and 20% of events had been live. Digital, as expected, had the highest

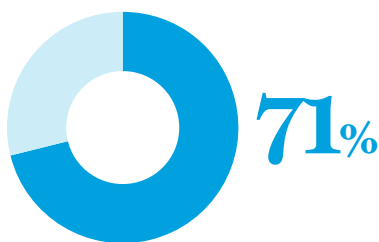
uptake, with 26% hosting the vast majority (81-100%) of their events in a digital format and another 20% seeing between 61-80% of events taking place online.

Looking towards the next 12 months, however, trends are shifting among planners. Nearly two-thirds (65%) say that 41-100% of their events will be live, with 19% expecting

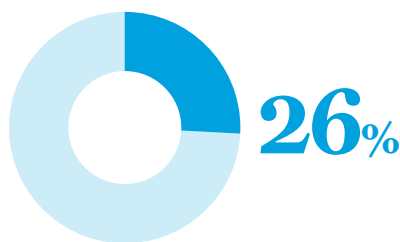
to host 81-100% of their events in person. Meanwhile, 41% say that only 0-20% of events will be hosted digitally. Hybrid is the least popular format for the coming year, with half those surveyed responding that only 0-20% of their events will be in this format.

So is digital – and in particular, hybrid – falling out of favour?

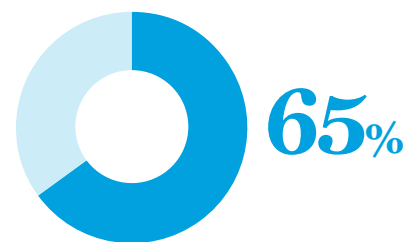
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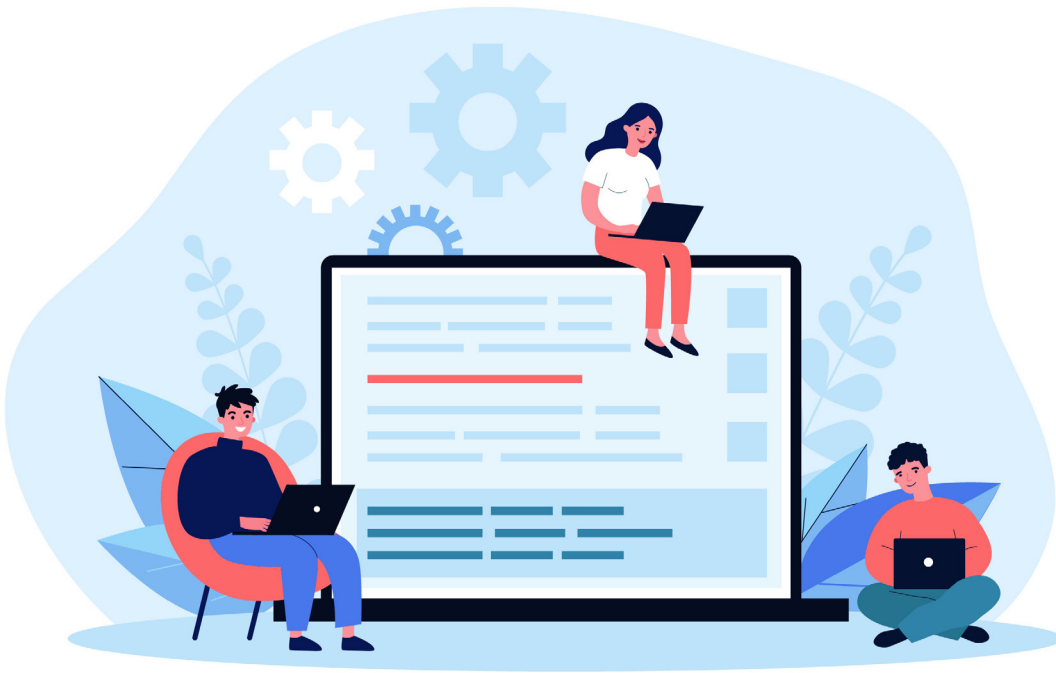


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What's next for digital and hybrid?

Although hybrid and digital were often identified as poor substitutes for live events, most respondents agree they are here to stay in some form. There is “absolutely a space for digital and hybrid, but live experience will be 80%,” says one agency project director. “Sustainability and budgets will be the biggest drivers in decisions.”

Poor uptake of hybrid both during and post-pandemic seems to come down to several factors, including cost, complexity and a preference for digital if live isn't possible. “Digital events are here to stay – hybrid events however, can create a two-tier system when it comes to attendees and also greatly add to the cost and complexity, so I think that hybrid events will reduce,” noted another planner.

Hybrid, in particular, appears to be a stop-gap solution to pave the way for a return to live. “A hybrid event enables you to increase

your outreach to new members, partners and clients,” says one events professional. “However, the aim is for these attendees to then attend the event physically in the future.”

However, ongoing reluctance for face-to-face events among some clients means that live continues to be a challenge. “Having just run our first live event in 20 months again, we are seeing keen interest in more,” reports a planner from a trade association. “However, there is at least as much resistance, due to many delegates needing to travel internationally; and their budgets are very restricted.”

As people become more choosy about which events they attend in person, having an online option will often be beneficial. One events industry CEO notes that some clients feel that they are losing attendees in person rather than gaining them online, however. “We are finding the extra costs are harder to sell than

we anticipated. That said, we definitely see online events continuing. Some events have proven to be more successful online, and some are more affordable to organise, so we fully expect to be organising digital and hybrid events next year and beyond.”

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The digital pros and cons

Even as planners' attention swings back towards in-person events, digital and hybrid formats were identified as having numerous benefits for clients over their live counterparts. A huge 71% of respondents said that these formats allowed events to have a global reach, potentially opening them up to untapped audiences worldwide. Another 61% cited sustainability, which is playing an increasing role in companies' CSR policies, and, therefore, client RPFs. Meanwhile, 49% said that digital and hybrid allowed greater inclusivity – another hot topic for event planners and clients alike.

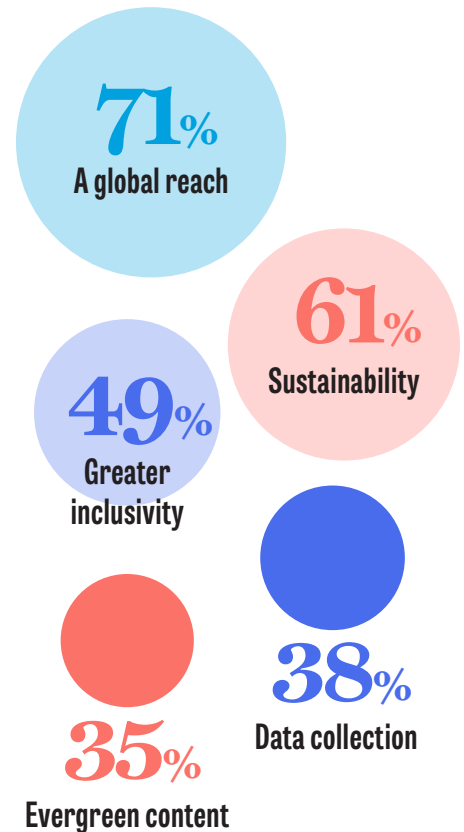
Data collection was mentioned as a benefit of digital and hybrid by 38%, and the potential for on-demand and evergreen content by 35%. Other advantages cited by individual planners included cost and flexibility.

There are some dissenting voices, however. One event planner comments: "Many people think that a digital event means more people can come globally, but that's rarely the case due to time zones. This only works for on-demand content, and not live streams or live digital interactions."

Another says: "We find on-demand content isn't as highly valued as it was during lockdown periods. People provide their time on the day of an event or within 24 hours, but not longer term."

However, the data suggests this is largely on a case-by-case basis and overall, digital has many plus points for achieving client goals and outcomes. One event producer sums up by saying: "It depends on the client's business plan, e.g. if regional expansion is planned, digital/hybrid provides accessibility. If remote working is planned, then digital/hybrid provides a more inclusive solution."

What are the benefits of digital and hybrid events over live events?



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Trusted technology

When respondents were asked about what technology they have used to transition to digital events, a range of platforms were mentioned, including Teams, Hopin and OnAir. Zoom was cited by the majority, with respondents saying it is intuitive, familiar and easy-to-use.

"We have been using Zoom on a regular basis for more than five years now so we were very familiar with it," says one events specialist. "It is very intuitive and we could easily adjust and learn how to conduct webinars with our pre-existing account."

The same respondent also used Cvent, saying: "It is a super-powerful tool where we can manage everything by ourselves and can use it for any event format."

Another events manager agrees that Cvent and Zoom have been most useful, noting: "Both platforms have integrated with each

other, which ensures a more seamless process for the event planner."

Several respondents have had to combine or vary the technology used in order to meet specific objectives or demands.

"We use technology that best suits the specific needs or the goals that we are needing to meet. There is no one specific tech that will suit all needs," says one events marketing professional.

"For us, the best results have come from combining technologies for different stages in the event lifecycle – apps before, during and after, and portals for the live broadcast," adds another respondent.

Some are still searching for the right software, or see the platforms they are using as a stopgap rather than a lasting solution. "A number of the most-used software platforms have been useful but it has by no means been a transitional period. It

has been a question of creating a meeting environment so the work could continue," says an events consultancy partner.

Looking to the future, many say they intend to carry on using Zoom, or whatever technology they have been using so far. Others said they would continue to innovate and use many different providers, or match the tech to the event or client objective.

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Measuring success

Event impact will continue to drive the priorities of planners and clients alike – so what are the most important outcomes and measurements that those booking events are hoping for? The most-wanted outcome is attendee engagement, followed by delegate satisfaction and return on investment. Lowest on the list of priorities are sign ups for future events, sponsorship sales and the creation of marketing collateral.

Other outcomes mentioned by individual respondents include employee recruitment and retention; creating learning opportunities, and driving membership sign up, reflecting the diverse purpose of events across the industry.

Many commenters agree that ROI, delegate satisfaction and attendee engagement work hand in hand. If engagement and satisfaction are low, this can affect future sign ups, which impacts ROI.

ROI is an important factor in growing business, both in terms of revenue and creating a loyal customer base for future events. “If the attendees are not engaged then they will switch off, but you need sponsorship to make the events happen, which in turn gives you the ROI,” explains an account manager.

This sentiment was echoed by a head of events sales: “Many of our events are paid for by partner or sponsor engagement, therefore their ROI is very important. However, delegate engagement is equal, as: no delegates, no sponsors!”

For associations and other organisations that have lost members, engagement and satisfaction needs to be generated through a strong event programme. ROI is key here also, as “both corporates and associations will be a lot more discerning

and demanding, and expect their staff and members to learn something tangible,” says one event professional.

Other benefits of a strong agenda include keeping staff happy and preventing the loss of talent, says a managing director. “As competition for staff intensifies across all industries, employee engagement and satisfaction will be key to staff retention.”

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Best practice for digital and hybrid

Whatever their personal feelings, planners will need to get to grips with digital and hybrid going forward; at least as an addition to live, if not a replacement for it. And providing value for both delegates and sponsors will be paramount to getting it right.

Planned properly, digital can deliver many of the same benefits as in-person. So what does best practice look like for our respondents? “Make digital events interactive and smaller, otherwise attendees will switch off. Allow attendees to engage with each other,” said one senior events manager. “These are all the benefits of live events, straight to the attendee’s door!”

However, attempting to transfer all the elements of a live programme into a digital format should be avoided, according to several respondents. “Think of a hybrid/digital programme as a separate programme to the live event – it needs its own focus

and attention,” advises one corporate events manager. “Don’t try to recreate a live event in digital.”

Strong digital content with plenty of engagement opportunities and interactive sessions, rather than passive listening and watching, was recommended. “Reinforce your marketing strategy, as more attendees will be needed to achieve the desired revenue if digital/hybrid events charge a lower fee than previous live events,” advises an association event planner. “Keep trying new things, and use surveys before and after your events to better understand the needs and wishes of your audience.”

Investment in digital and hybrid will be required, as will constant evaluation throughout, checking in with your audience and refining KPIs and objectives. Respondents also noted that there is a strong opportunity to personalise content and drive pre- and post-event engagement with on-demand content.

“The digitalisation of events has meant we are gathering more and better data in which to measure results and inform future strategy,” says one respondent. “This delivers better business intelligence to our clients and strengthens their ROI, which in turn gives clients more confidence to invest in the future and better targeting of budgets.”

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Future focus

Although many planners and clients are keen to return to live, there was agreement that digital and hybrid will have a place in the future of the event industry. Some of this is due to the uncertainty around the logistics of live delivery.

"We are hopeful of returning to live events, but the lack of staff in hotels and hospitality is very concerning," says one senior planner. "Rates are increasing and hotels are so busy with bookings there is no room to negotiate, leaving us with unfavourable terms."

Many showed reluctance or concerns around the hybrid model, going forward, due to its cost and complexity. However, several respondents agreed that it would have a place, at least temporarily.

The majority said they would continue to offer options for both live and digital, drawing on the strengths of both

approaches. "I think we will continue to mix digital and in-person events and develop a new model focused on valuable content with modified networking," says an association events professional. "There are so many positives to take from the digital event space, such as extra data, a broader audience etc., that we need to try and keep some of this, moving forward."

Smaller and more tailored in-person events could be supplemented with larger digital offerings. "I think events will be smaller and more targeted to the customer. On the side we will always have digital for inclusion, new customers, and people that don't want to travel," says a strategic events specialist.

The overall sentiment was best summed up by one events marketing professional: "Those that embrace the opportunities that digital and hybrid bring, will reap longer-term success."

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Sector-specific trends

The survey data highlighted sector-specific trends for event planners working in the government, association, non-profit and education (GANE) areas. A breakdown of these by industry is summarised below.

Government

For planners working closely with government organisations, digital and hybrid are popular options going forward. In general, this group is positive about the role hybrid will play in the facilitation of events in the future. “While we continue to return to live events, we will certainly be putting in hybrid measures to ensure flexibility and accessibility,” says one senior events manager for a large government-run initiative.

A blended approach will see a focus on innovation and engagement, rather than rushing a return to live events. “It will very much continue to be a crossover between

live, hybrid and digital for the foreseeable future,” says an event agency planner. “Engagement is key for most of our events as we’re focusing on bringing people together after a long period of being unable to do this.”

There will also be a renewed focus on the relative low cost of attending digital events and consideration of delegates’ busy work schedules. “Digital events are a cost and time-effective way to engage with our members, so we will continue to offer them,” explains one international events manager. “We can use the learnings from the past 20 months to refresh our event offerings to give the best value to our members.”

A paradigm shift caused by the pandemic means this sector is interested in new ways of working, and hybrid is one element setting a new trend, explains a managing director from an events agency serving this sector. “Hybrid will carve a new era of live events. Digital will remain for the smaller end of the meetings market as a high percentage.” ➔

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Associations

The association market is less sure about hybrid and digital options, with several saying that people want to get back to live meetings again. “There’s a great deal of mediocre events online. Cutting through the noise with slick events – that’s going to be true for live events when they return,” says the CEO of an international broadcasting association.

According to one association event planner, for new ideas to be successfully adopted “a restructure is needed in the planning of our events and also some experimental time to assess how our audience responds to new adjustments”.

This being said, there are also upsides, and associations could benefit from the new conference model of hybrid and digital options, and the opportunities it brings.

As with many other sectors, there is both individual and organisational unease when it comes to a full return to in-person events, due to new virus strains and all the compliance and legality issues surrounding exposure. “There is still a long way to go before clients will regain confidence in doing live events and suppliers will be confident enough, and not put up too many barriers for agencies,” explains an association business development manager.

Non-profit

Virtual events continue to be the preferred method for hosting within the non-profit space. “In my current company, there seems to be a low appetite for anything other than virtual events,” says a senior events manager from the charitable arm of a banking corporation.

Digital appears to have become a permanent fixture in some form, allowing for greater reach and building of donors, both vital to the survival of this sector.

“I think digital events are most definitely here to stay,” says the engagement manager at a national health charity. “When we do go back to face-to-face, then we’ll most definitely adopt a hybrid approach in some way, so that we can continue to reach our full supporter and stakeholder audience and increase our marketable universe.”

Live will still be on the agenda, but it is currently in the experimentation phase for many non-profits. “I see next year as a test year to pilot the return to physical alongside digital events to see how our audience responds,” says a head of events at a membership organisation in the charity sector.

Again, a blended approach is likely for most, whether that’s a hybrid solution, or a mix of live and digital events.

Education

Educational event planners are split between those who endorse hybrid solutions and those who believe hybrid will require too many complex and expensive production elements.

One university events officer says that their strategy is diversifying to accommodate hybrid events. Whereas a senior event planner argues that, “there will always be a place for digital and also for on-demand content, but not always the full production hybrid.”

Either way, the pandemic and its acceleration of digital technology has left its mark. “I feel positive that the appetite for events has never been stronger and when we are able to return to in-person, I feel we will do things differently,” explains an EMEA events leader for a scientific education organisation.

He continues: “People will be more selective about the events they attend and organisers need to be more innovative about what they offer exhibitors and delegates. Immersive technology will continue to evolve and be a focus for us as a business.”

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