

The Delegate Confidence Survey

August 2021



ABPCO

Association of
British Professional
Conference Organisers

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Executive Summary

Introduction

When the UK Lockdown commenced on 23 March 2020, the events industry came to a complete standstill and was effectively closed for 16 months. Conference venue doors were locked, hotels were mothballed, and many staff were furloughed – there were no conferences, no delegates, no exhibitors, no build, no breakdown, no buzz.

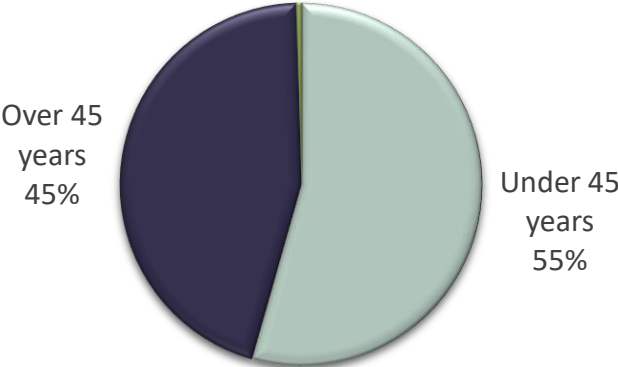
Fast forward to Autumn 2021 and we are getting back to staging all types of events again, but whilst we have seen dozens of surveys across the industry asking opinions on the future of events, there appears to be no collective data on what delegates think about attending conferences and their levels of confidence.

Working with Catherine Newhall-Caiger of Bramcote International, ABPCO Members have pooled resources to undertake this important nationwide survey to establish the delegate appetite for face-to-face meetings, identify the perceived potential barriers to attendance at events and finally, understand the additional measures that delegates will expect from their Conference Organisers and Venues to give them confidence to attend conferences in a post-Pandemic world.

ABPCO Members issued the survey to their individual memberships in July 2021. The 10-question survey was designed to establish current opinion amongst UK conference delegates on their confidence levels in attending conferences.

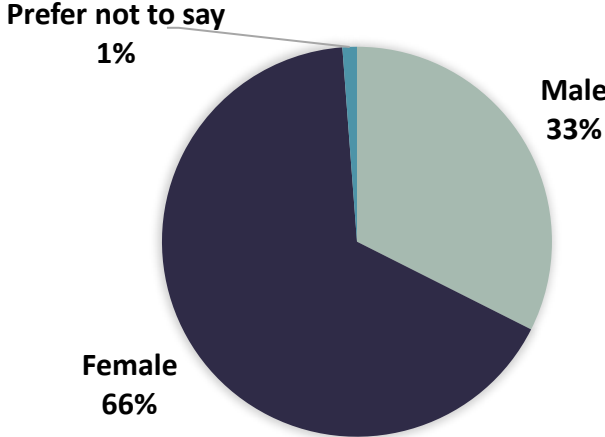
Demographics of Respondents

1. Age



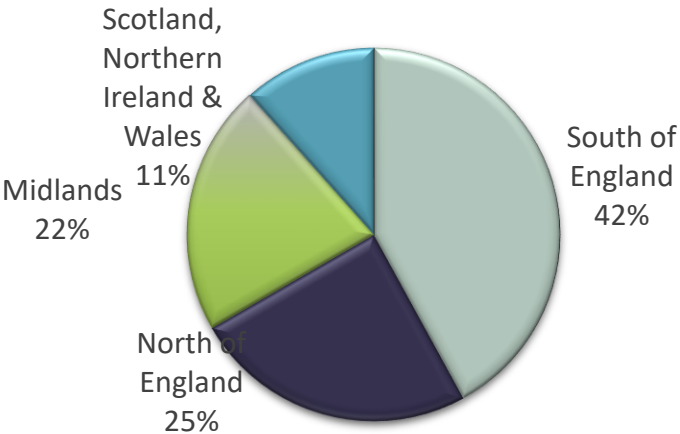
- 54.4% under 45 years
- 45.2% over 45 years
- 0.4% preferred not to say

2. Gender



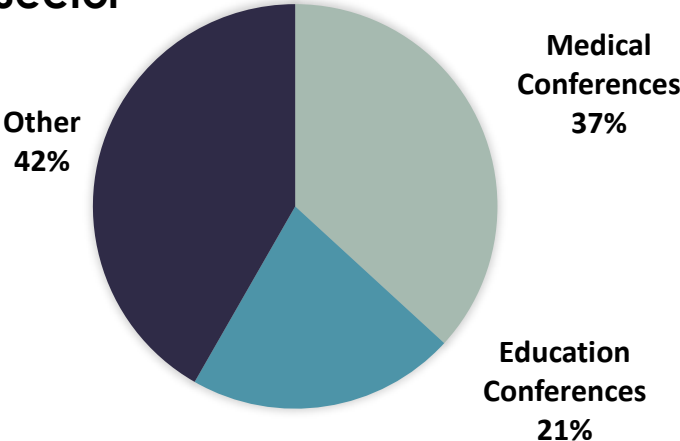
- 66.53% Female
- 32.5% Male
- 1.21% preferred not to say

3. Location



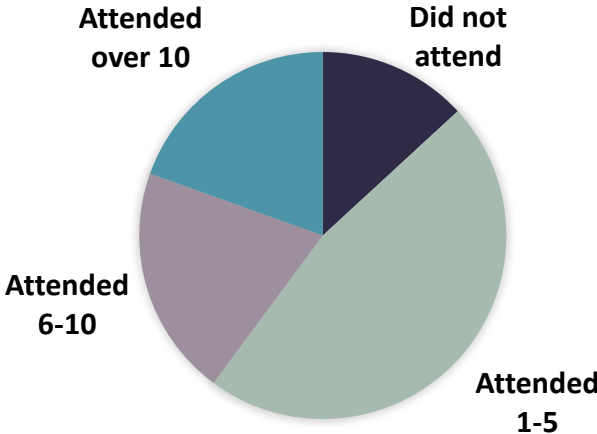
- 34.8% in South of England
- 20.4% in the North of England
- 18% in Scotland, Northern Ireland & Wales
- 9.6% in The Midlands

4. Conference Sector



- 36.84% attended medical conferences
- 21.46% attended education conferences
- 41.7% other

5. Attendance at Virtual Professional Business Conferences (50+ delegates) since March 2020



- 13.15% did not attend any virtual business conferences
- 47% attended 1-5 virtual business conferences
- 20.32% attended 6-10 virtual business conferences
- 19.52% attended over 10 virtual business conferences

The Survey covered the following 5 topics:

- Key elements of conferences that delegates missed during Lockdown
- Delegates' current comfort levels
- Delegates' requirements for additional measures at conferences to encourage attendance
- The date that delegates plan to attend their next 'in person' conference
- How delegates plan to travel to their next conference

The Survey Questions are detailed in the Appendices.

1. Key Elements of 'In Person' Conferences that Delegates have missed during Lockdown

93.47% of respondents missed the networking, social interaction and meeting people. This was followed by 46.94% who missed the social programme and 44.9% missed the smaller sessions and workshops.

The results were consistent across all demographics.

Only 16.33% of respondents stated that they missed the learning opportunities and CPD elements of the conference which is somewhat surprising as for many event professionals 'Content is King'. The explanation for this disparity could be interpreted that respondents were already receiving content virtually and therefore they did not miss this element.

This emphasises the importance of creating networking opportunities for delegates attending conferences.

2. Delegates' Current Comfort Levels

46.61% of respondents are happy to attend 'in person' events now that Government restrictions have been lifted. This increases to 75% if the respondents who would attend once they are fully vaccinated (28.69%) which is encouraging. However, 34.26% of respondents would like to see additional measures such as social distancing, mask wearing, hand sanitisation points etc implemented at the conference venue.

In terms of the demographics of respondents, 57.5% of males were happy to attend in-person conferences

now Government restrictions have lifted, compared to 42.42% of females. There were also significant differences in the desire to have additional measures in place at conference venues. 40% of female respondents wanted this, compared to 21.25% of males.

These results would suggest that there are higher confidence levels amongst male respondents than female respondents in their approach to attending conferences.

3. Delegate Requirements for Additional Measures at Conference to Encourage Attendance

20% of respondents do not want any additional measures.

70.85% of respondents want to have reasonable cancellation terms for registration fees if they cannot attend due to Covid.

The top 3 additional measures that respondents wanted to see at conference are:

- Hand sanitisation points – 57.49%
- Enhanced cleaning regimes e.g. Good to go – 47.75%
- Screening – Negative Covid Test results provided by delegates – 40.08%

There were no significant differences if the responses were analysed by age, gender or sector.

These results would suggest that greater flexibility around registration cancellation fees are expected, together with enhanced hygiene measures at the Conference Venue.

4. Date that Delegates plan to attend their next 'in person' Conference

28.46% of respondents plan to attend their next 'in person' conference in September and 30.49% from April 2022. In many cases, these results will be driven by the date when respondents' individual organisations are staging 'in person' events rather than personal choice.

The results across the demographics are fairly consistent.

It is encouraging that nearly 70% of respondents plan to attend their next conference within the next 6 months.

5. Travel Plans

42.74% of respondents plan to travel by train to their next conference and 32.26% plan to travel by car. An encouraging 20.16% will travel by plane.

In terms of gender, 34.97% of female respondents will travel by car, compared to 26.58% of males.

51.0% of male respondents will travel by train compared to 38.65% of females.

36% of the over 45s would travel by car, compared to 29.63% of the under-45s but this could be driven by car ownership.

If this trend continues, then consideration will need to be given for organisers to have adequate car parking facilities at the conference destination/venue.

Key Take-outs

- An overwhelming **93%** of respondents miss the networking, social interaction, and meeting people
- **47%** of respondents are happy to attend 'in person' events, this rises to **75%** if the individual is fully vaccinated.
- **34%** of respondents want to see additional measures in place at their conference
- **71%** of respondents want flexible cancellation terms for registration fees if unable to attend due to Covid.
- **70%** of respondents will be attending their next event before March 2022 (this is likely to be driven by timing of their specialist conference)
- **32%** of respondents will travel to the next conference by car, **43%** by train, **20%** by plane

As an industry, we need to consider how we can use this information to give delegates additional confidence as they return to 'in person' events.

Key Improvement Areas

- Increase networking opportunities within events
- Introduce/maintain Covid-safe measures at conference venues to increase confidence levels and encourage attendance at 'in person' conferences
- Introduce flexible Covid cancellations terms for registration fees
- Accommodate reduction in use of public transport by delegates
- Continue to maintain a flexible approach

The ABPCO Delegate Confidence Levels Survey is a snapshot of the current climate. As the vaccination roll out continues and confidence amongst the UK population increases, this will be reflected in those who participate in conferences and therefore delegate confidence levels should continue to rise.

However, it is important that the results of this ABPCO Survey are taken into consideration in the future planning of conferences so that delegates can attend conferences with confidence in their organisation, their conference organiser and their conference venue.

Introduction

Throughout the Covid-19 Pandemic, numerous surveys have been completed to assess the state of the Events Industry. These surveys have been instrumental in highlighting the impact that Lockdown has had on the Event Industry which has informed Industry Partners and contributed to shaping the agenda for Government support as we approach the return of events without restrictions.

In the UK, there appears to be a lack of survey data where consumer confidence is reviewed from a delegate perspective. It is well documented that many venues are currently experiencing an influx of enquiries and that there is 'pent up' demand, but what about the delegate – what do they think? Are they confident about attending events? Will they need reassurance to attend events? If so, what measures will reassure them?

Many individual Associations and venues have already surveyed their Membership and clients to assess the appetite for face-to-face meetings and to understand the requirements that delegates would like to have in place at events to give them the 'comfort factor'. However, there appears to be limited collective data available on delegate confidence levels within the UK Event Industry.

Working with Catherine Newhall-Caiger from Bramcote International, ABPCO Members have pooled resources to undertake this important nationwide survey to establish the delegate appetite for face-to-face meetings, identify the perceived potential barriers to attendance at events and finally, understand the additional measures that delegates will expect from their Conference Organisers and Venues to give them confidence to attend conferences in a post-Pandemic world.

This Survey Report is based on certain assumptions, other information that is provided, and on knowledge of the Events Industry.

Methodology

In order to understand Delegate Confidence Levels in the UK, a nationwide survey of a cross section of association delegates was undertaken by ABPCO Members in July 2021. The purpose was to establish and understand confidence levels amongst conference delegates and their requirements to mitigate personal risk when attending conferences in a post-Pandemic world.

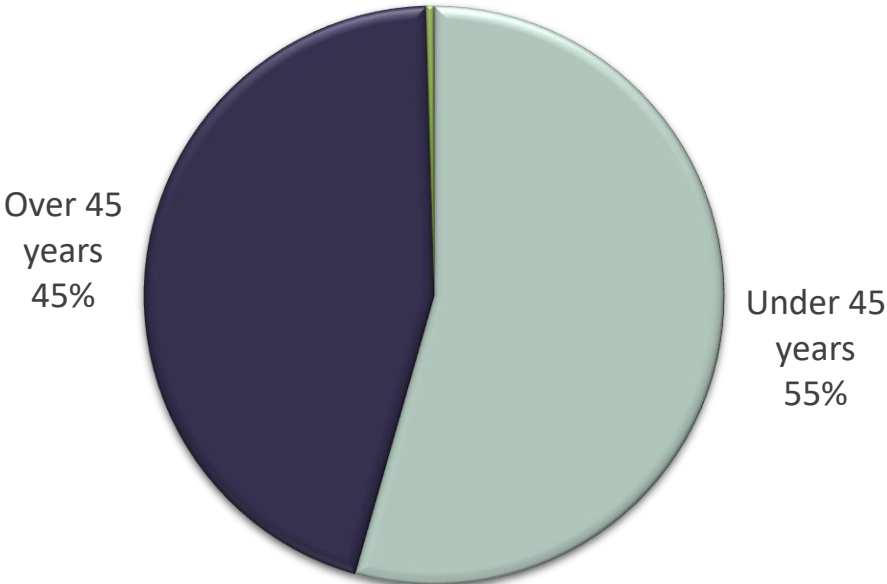
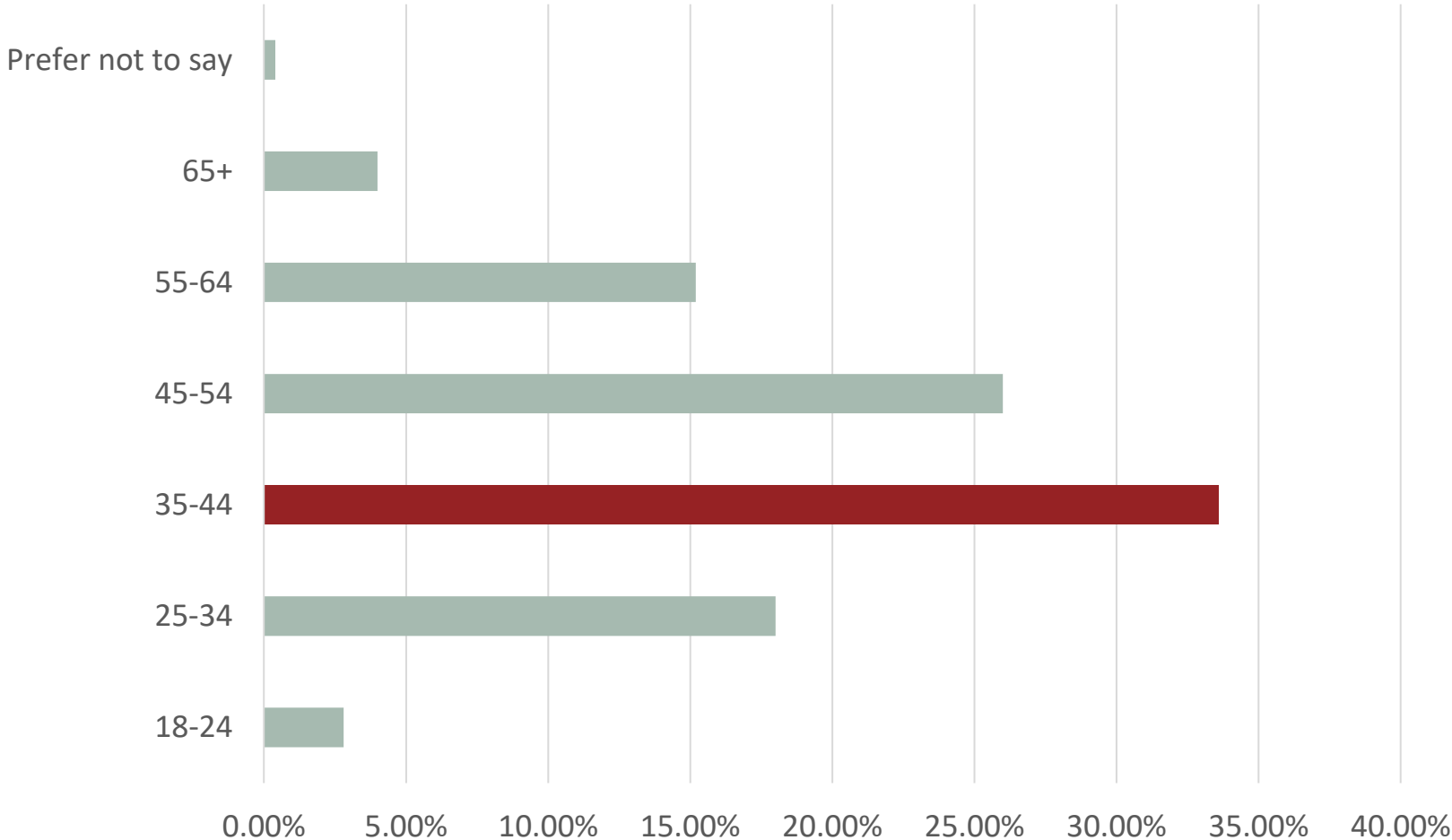
Individual ABPCO Members issued a 10-question survey to their membership which focussed on the following key areas: (the survey was also published on social media)

- Demographics of respondents
 - Gender
 - Age
 - Speciality/Category of Conference
 - Location of respondent
- Professional Business Conferences
 - Attendance at Virtual Conferences during the Pandemic.
 - Elements of 'in person' conferences that respondents missed.
 - Individual comfort Levels in attending 'in person' conferences.
 - Additional measures Respondents would like to see in place at 'in person' conferences that would encourage their attendance.
 - The date of their next 'in person' conference.
 - Travel plans

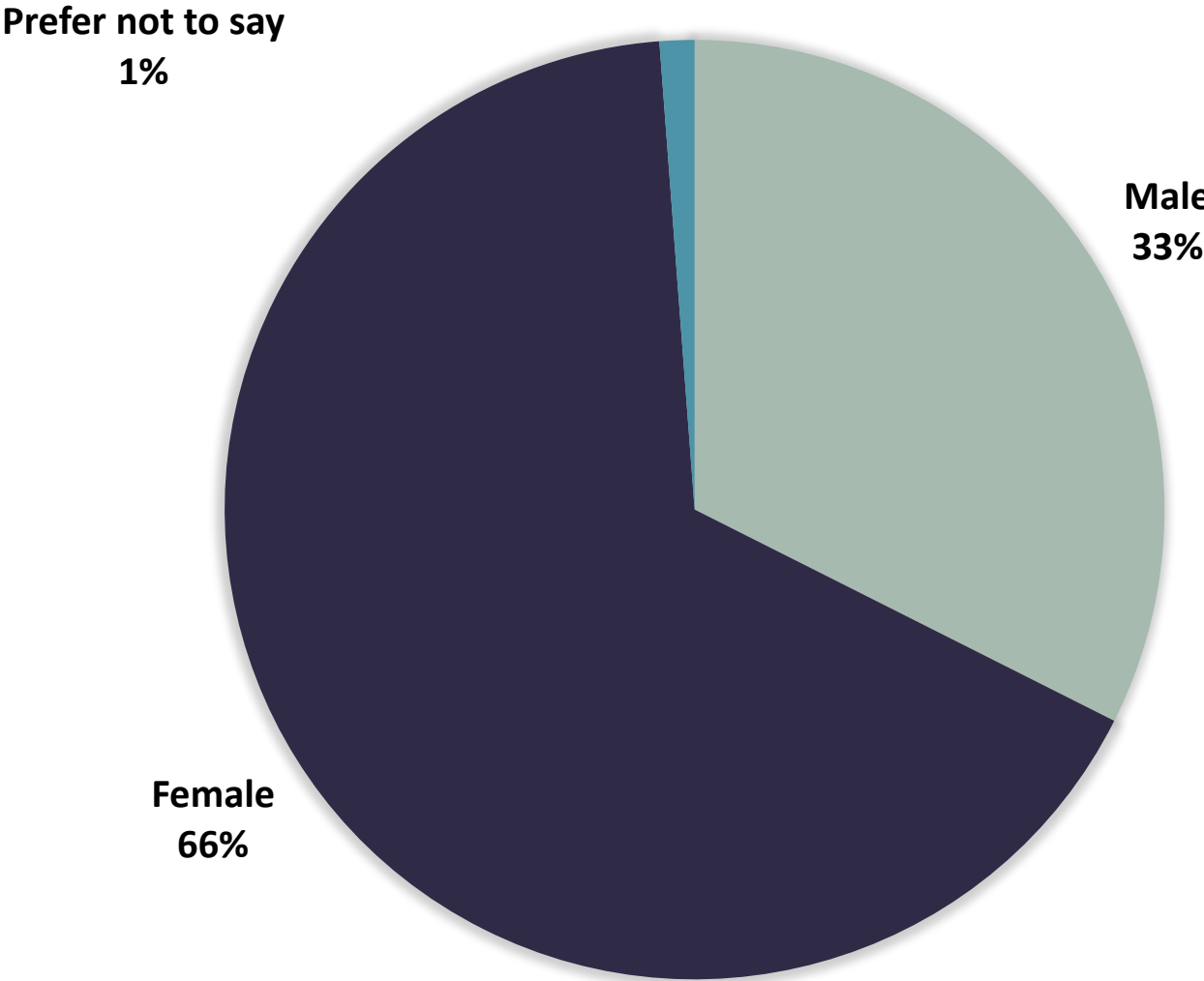
The Survey Questions are listed in the Appendices.

*Demographics
of the
Respondents*

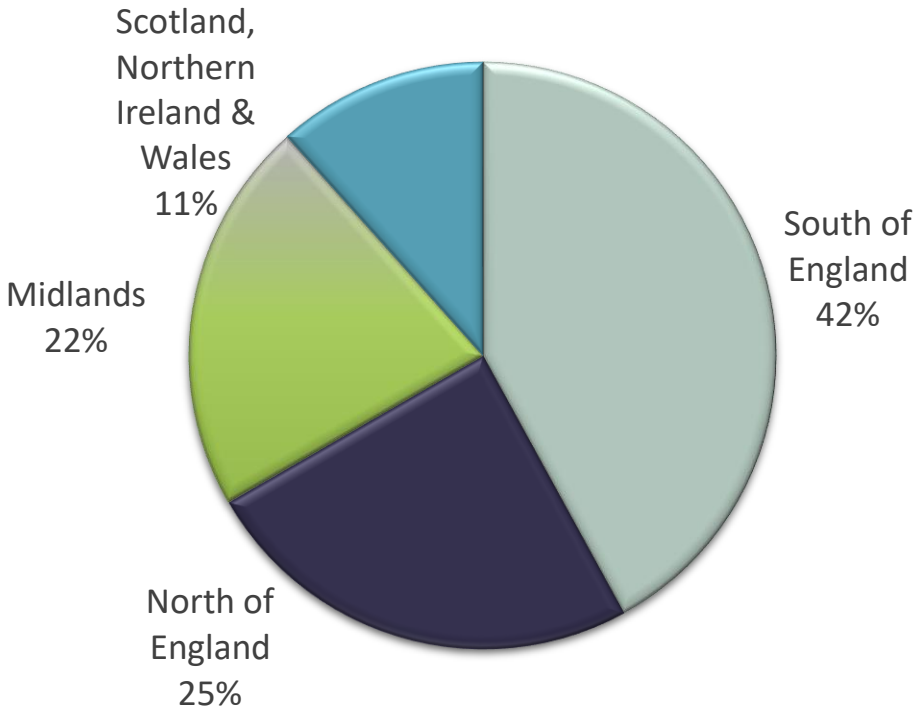
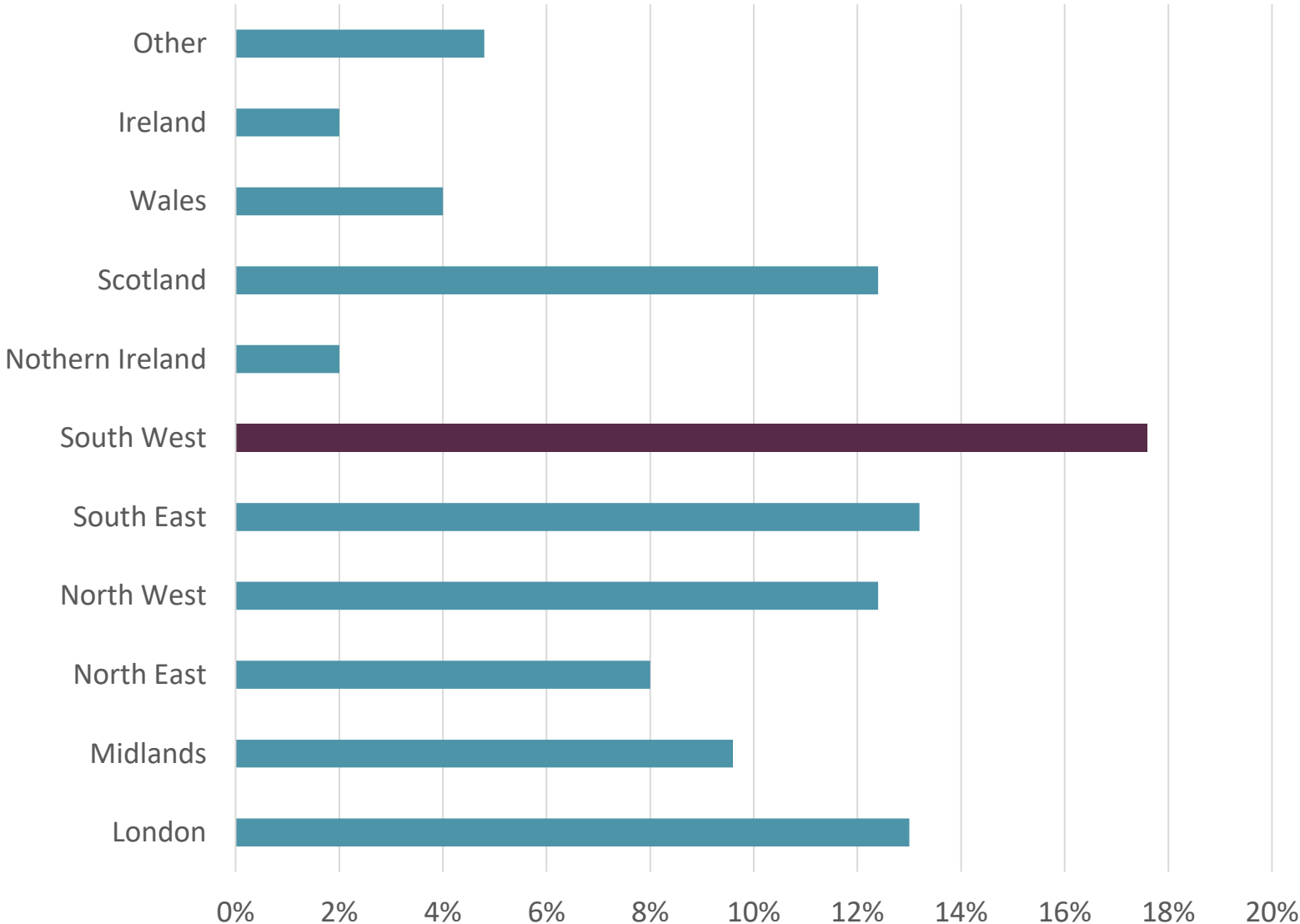
As can be seen from the graph below, there was a broad range of age for the respondents, 54.4% were under 45 years and 45.2% were over 45 years, with 0.4% of the respondents preferring not to say.



The respondents were 66.53% female and 32.36% male, with 1.21% of respondents preferring not to say.

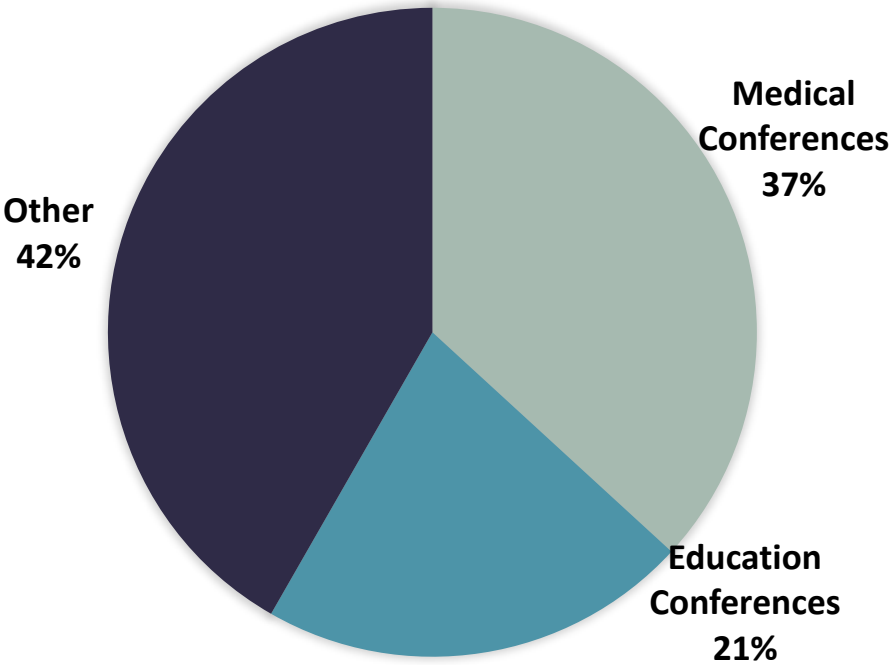
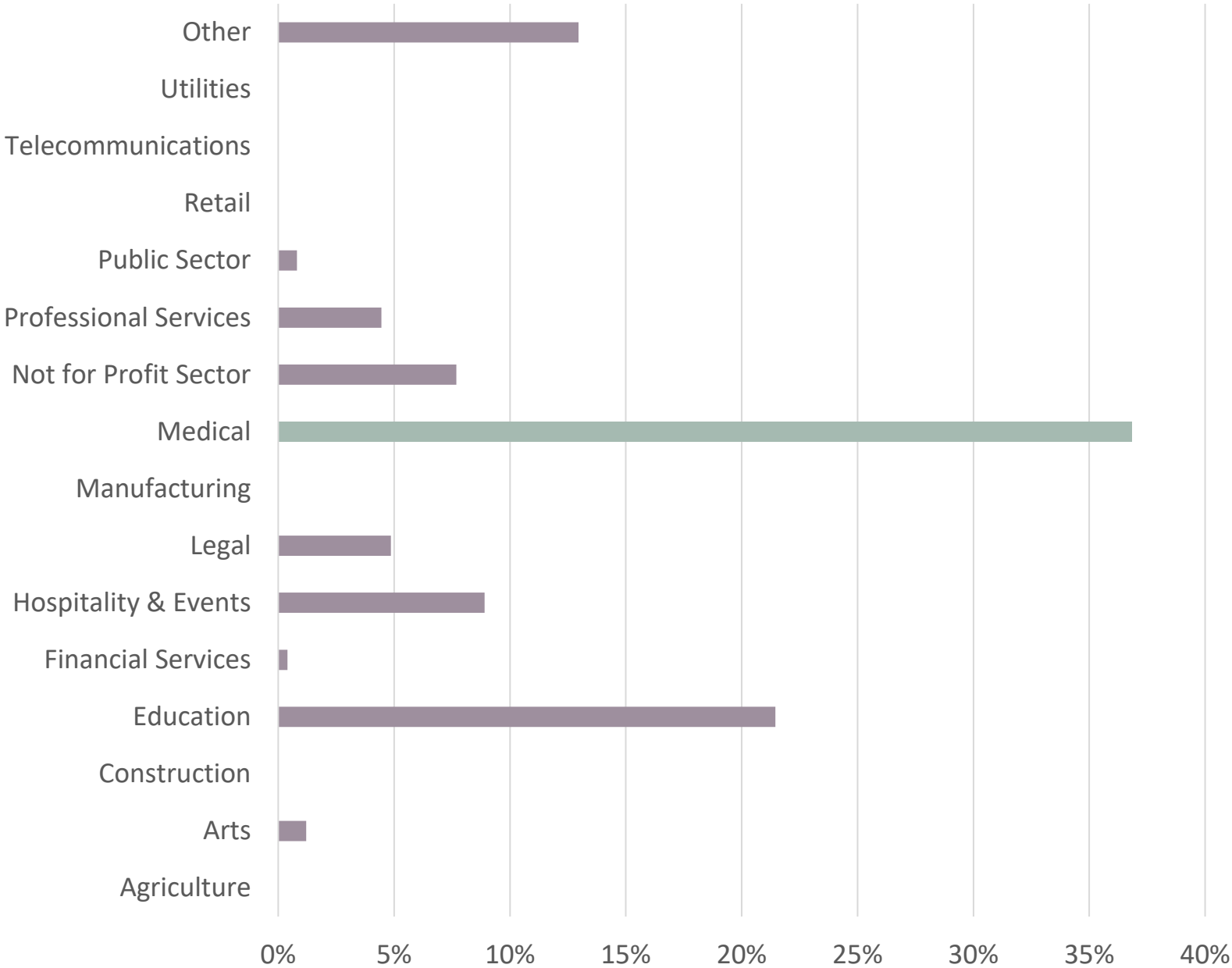


The respondents were spread across England with 34.8% located in the South, 9.6% in the Midlands, 20.4% in the North and 18% in Scotland, Wales and Northern Ireland.



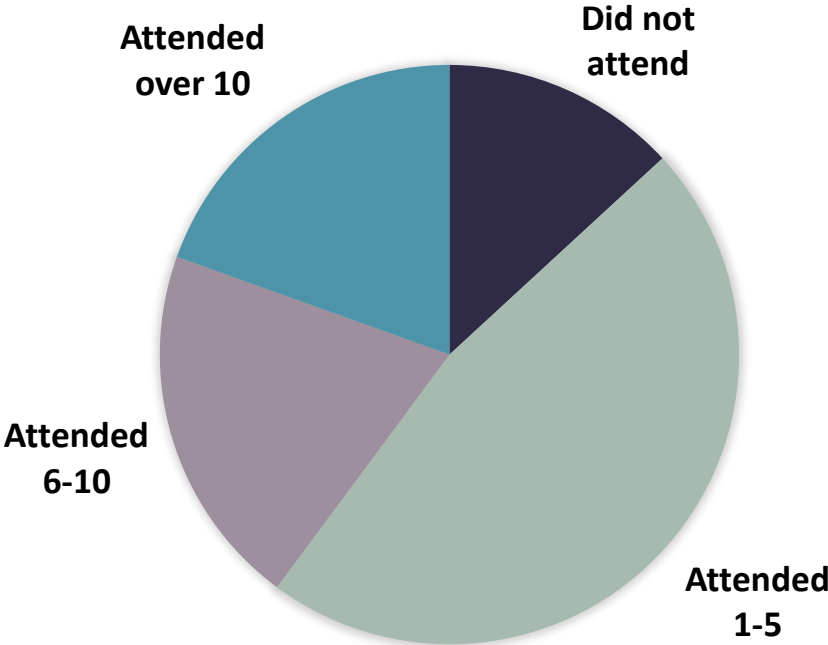
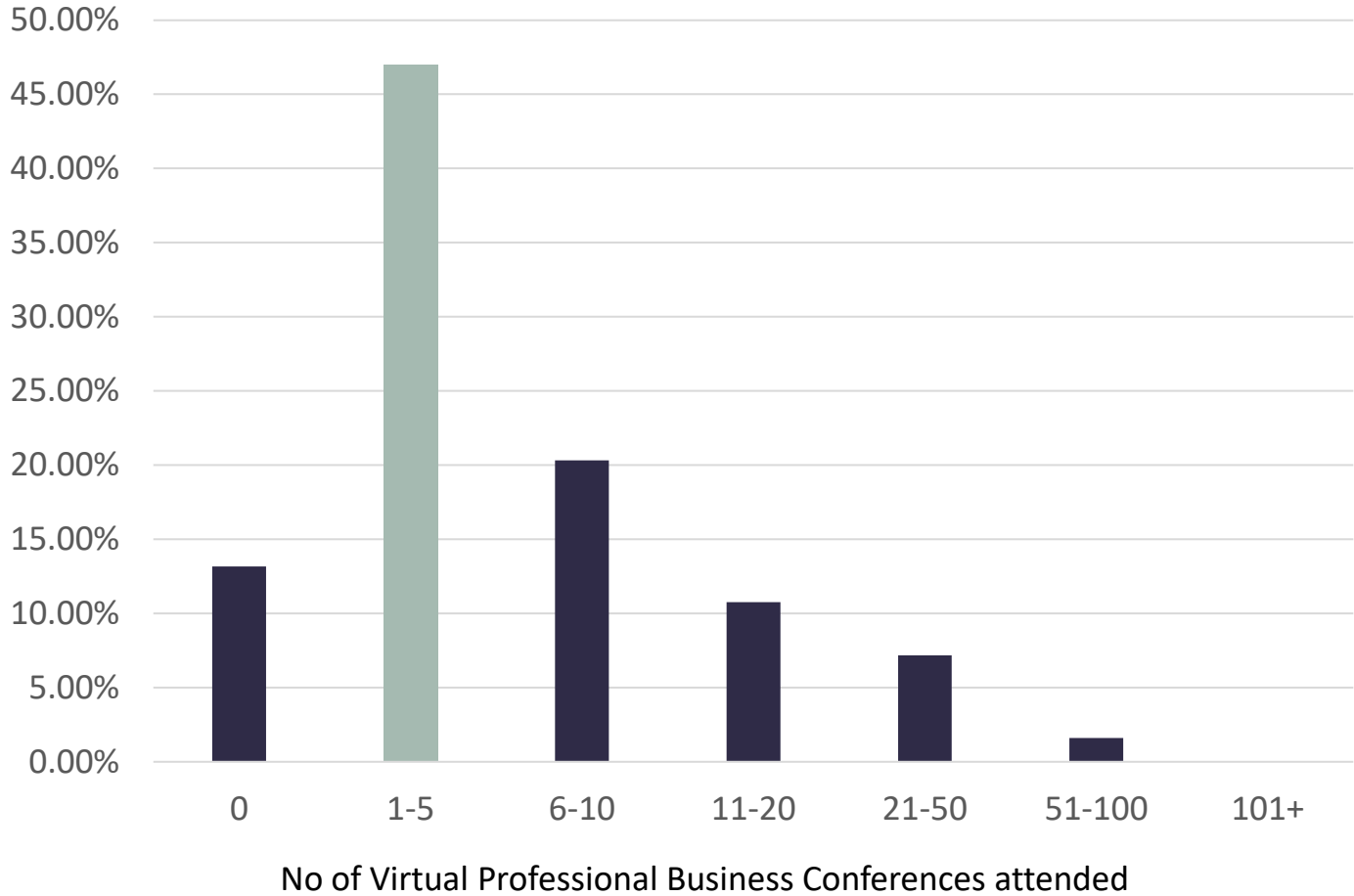
Demographics – Sector of Conference

The highest number of respondents came from 2 distinct sectors - 36.84% of respondents attended medical conferences, whilst 21.46% of respondents attended education conferences.



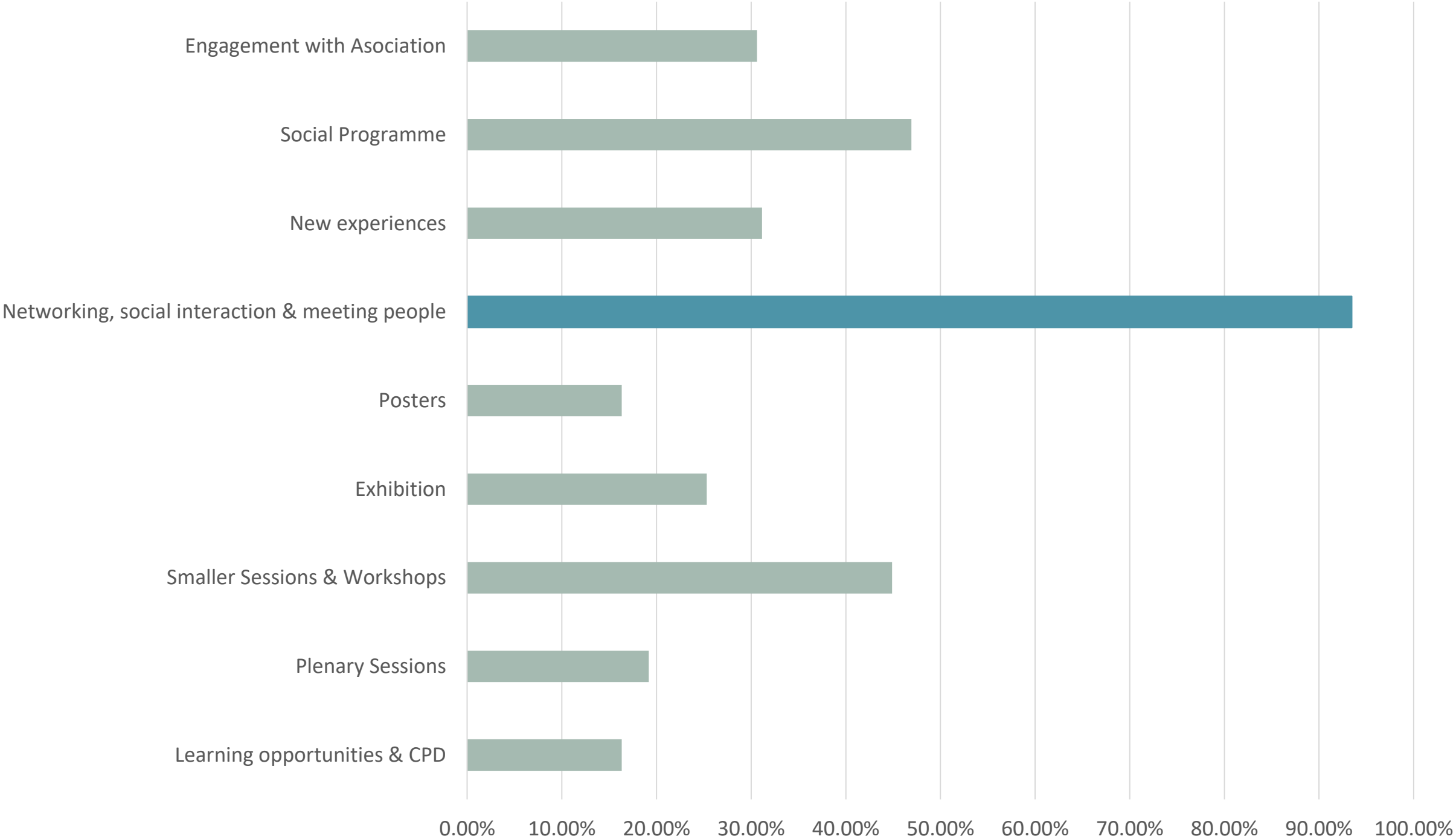
Survey Results

Q. How many external professional business conferences connected with your current role have you attended virtually since the start of Government Restrictions in March 2020?



Since March 2020, 13.15% of respondents did not attend any Virtual External Professional Business Conferences. 47% attended 1- 5 conferences, 20.32% attended 6-10 conferences and 19.52% attended over 10 conferences.

Q. Which key elements of attending a conference 'in person' do you miss?



Before the Covid-19 Pandemic, attending a conference was a normal part of business and personal life and for the last 16 months, the events industry has been innovative, and conferences have continued to proceed on a virtual basis. But what have delegates missed most about 'in person' conferences?

93.47% of respondents missed the networking, social interaction, and meeting people, followed by 46.94% who missed the social programme and thirdly, 44.9% missed the smaller sessions and workshops.

It has always been recognised that networking, social interaction and meeting people has been an integral part of conferences and is one of the key drivers for attendance. 93.47% of respondents confirmed that they missed this key element which is an overwhelming response and demonstrates the important role that conferences play in providing a platform for individuals to physically network with their peers.

In addition, the high response for the social programme and smaller workshops and sessions also demonstrates the need to provide an environment where delegates can meet face-to-face to interact and socialise with their fellow delegates.

Irrespective of age, gender or speciality, the results were consistent across all demographics.

Delegates have had very limited networking opportunities face-to-face for 16 months. As Conference Organisers and Venues, we need to ensure that we look at how we can maximise these networking opportunities for delegates by providing a variety of platforms that encourages engagement between individuals and allows them to grow their network.

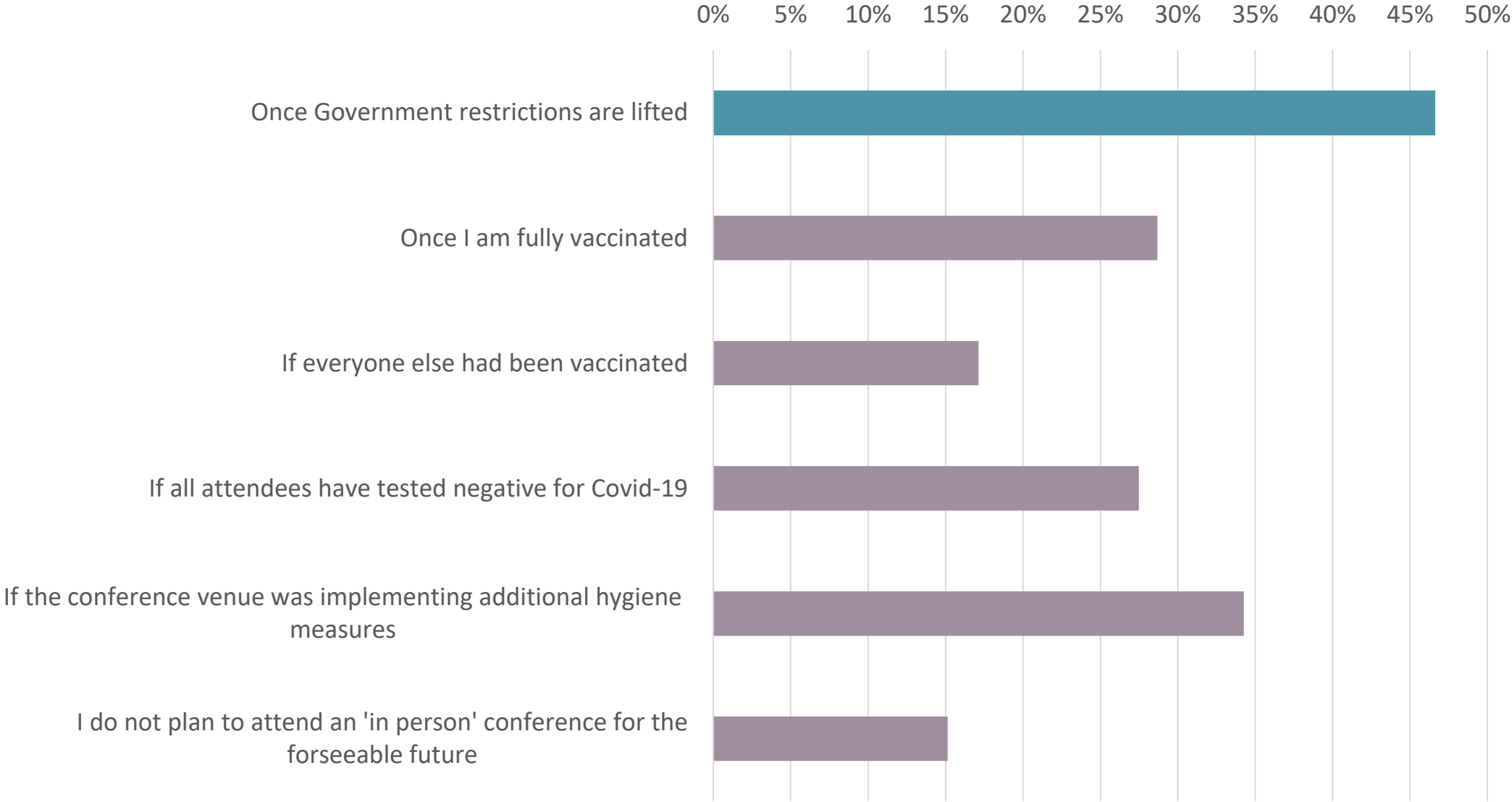
It was interesting to note that 25% of respondents missed the exhibition, another opportunity for networking, however, only 16.33% of respondents stated that they missed the learning opportunities and CPD.

The well-known mantra for Event Professionals 'Content is King' is often highlighted as a key driver for delegate attendance, however, respondents were already receiving content virtually, so this could be interpreted as they didn't miss this element. If so, this further reinforces the requirement to provide multiple networking opportunities to generate social interaction.



Q. Which statement(s) describes your current comfort level about attending an event in person?

I am happy to attend an 'in person' event...



Nearly half of respondents (46.61%) are happy to attend 'in person' events now that Government restrictions have been lifted. This rises to 75% if the respondents who would attend once they are fully vaccinated (28.69%) are included.

15.14% do not plan to attend an 'in person' conference for the foreseeable future. Overall, this is very encouraging and demonstrates that a significant percentage of respondents will attend conferences.

It is also important to note that 34.26% of respondents would attend an 'in person' conferences if the venue implemented measures such as social distancing, mask wearing, hand sanitisation points etc. and this would suggest that delegates will feel reassured if these visible measures were in place. This is explored in more detail in the next section.

If we review the results in terms of the demographics of the respondents, then an interesting picture emerges.

With regard to the demographics of those surveyed, there was no difference in the age of respondents attending an 'in person' conferences once Government restrictions were lifted, apart from 37.5% of the under 45s preferring to wait until they had been vaccinated compared to 18% of the over-45s.

This result could be explained by the vaccine rollout and some under-45s are still waiting for their final vaccination.

In terms of gender, 57.5% of male respondents are happy to attend an 'in person' conference now that Government restrictions are lifted compared to 42.42% for females.

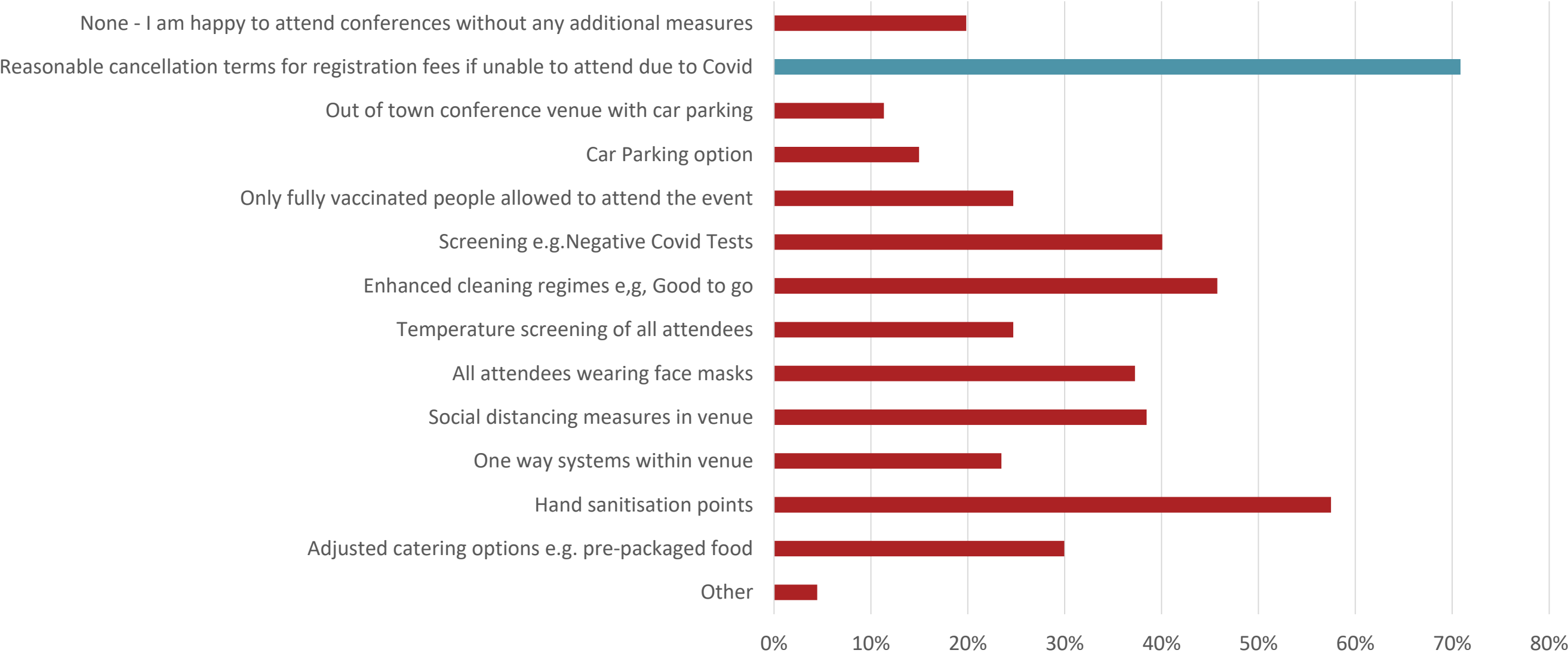
40% of female respondents also want the conference venue to implement enhanced hygiene measures compared to 21.25% of males.

These results of this specific survey would suggest male respondents appear to have higher confidence levels than the females in their approach to attending conferences.

Conference Organisers should review the gender demographics of their events and take this into consideration when planning their events.



Q. If the Conference was implementing additional measures which were communicated in advance, what would encourage you to attend?



20% of respondents do not require any additional measures to be implemented in the conference venue for them to attend conferences.

70.85% of respondents want to have reasonable cancellation terms for registration fees if they are unable to attend due to Covid-19.

Traditionally, many conference organisers have offered a sliding scale of cancellation fees depending on when a delegate cancels their registration. This is a reasonable approach as Organisers need to know delegate numbers so that they can plan the event accordingly. However, in the current circumstances to reassure delegates, Conference Organisers should consider greater flexibility for cancellation of Registration Fees, specifically relating to Covid-19 issues.

In terms of respondents, the most preferred additional measures from a venue perspective are:

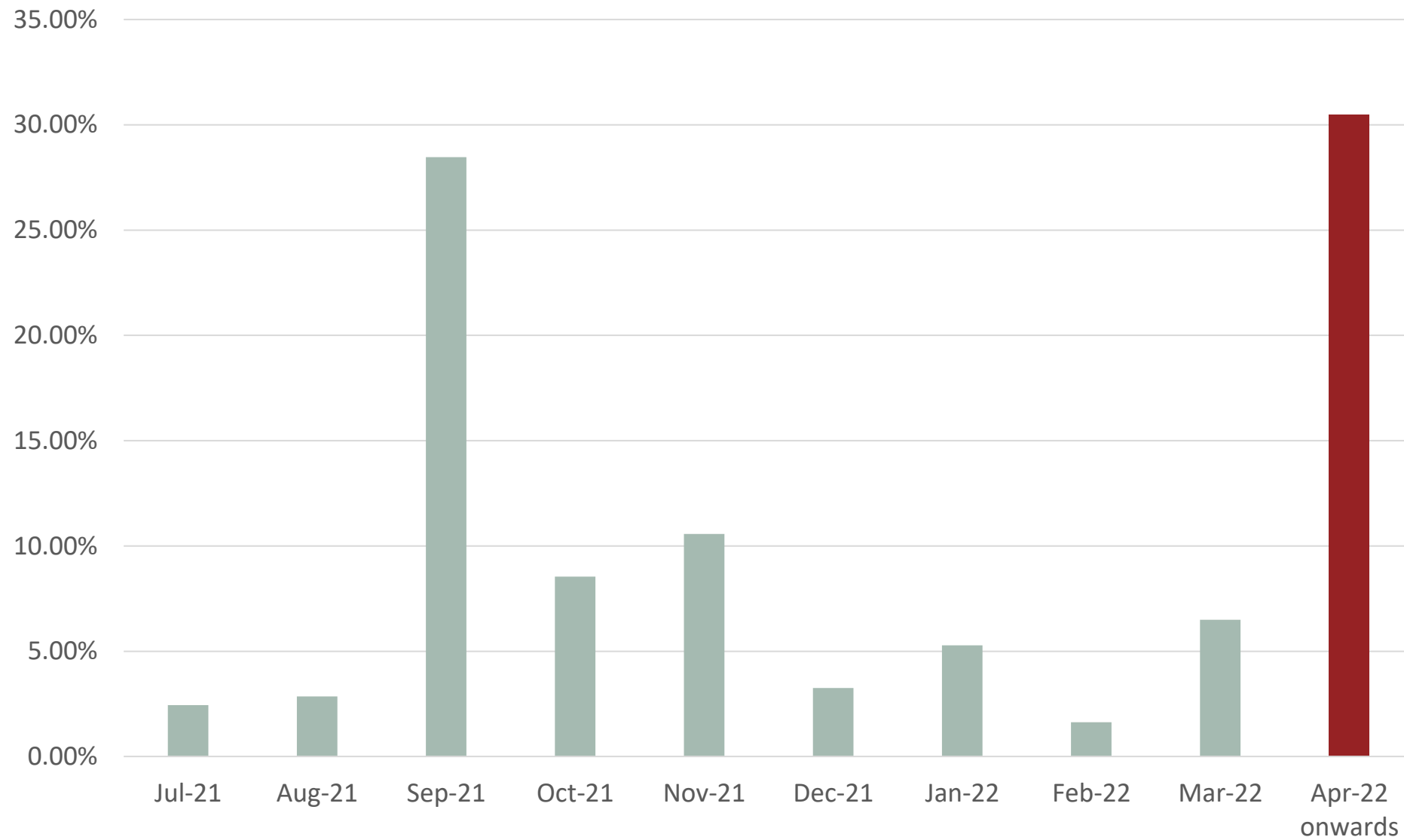
- 57.49% - Hand sanitisation points
- 45.75% - Enhanced cleaning regimes e.g. Good to Go
- 40.08% - Screening – Negative Covid Test results provided by delegates
- 38.46%- Social distancing
- 37.25% - Mask wearing
- 29.96% - Adjusted catering options e.g. pre-packaged food
- 24.7% - All delegates fully vaccinated & Temperature screening of all delegates
- 23.48% - One-way systems around venue
- 14.98% - Car parking option
- 11.34% - Out of town conference venue with car parking

There were no significant differences if the responses were analysed by age, gender or sector.

Based on the responses, delegates want flexible Registration cancellation fees for Covid-19 related issues and visible Covid-safe measures at the conference venue focussed around hygiene and social distancing measures.



Q. When do you plan to attend your next 'in person' conference?



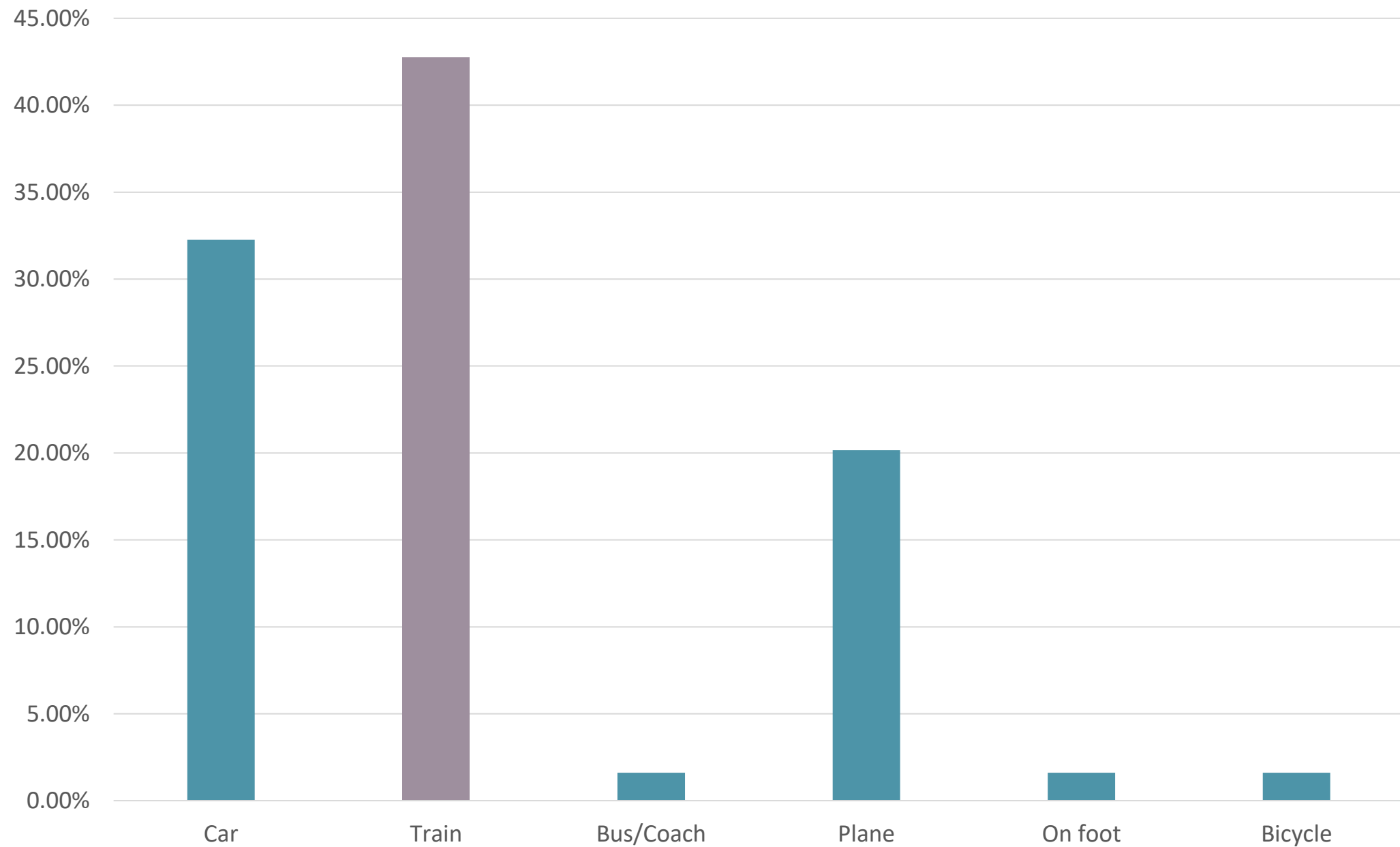
28.46% of respondents plan to attend their next 'in person' conference in September and 30.49% from April 2022 onwards.

However, this will be driven as to when their organisation is staging the next meeting rather than perhaps their own personal choice.

Most association conferences are a significant revenue generator for their organisation and the Pandemic has led to associations having to undergo radical change to survive. Consequently, some organisations are striving ahead to proceed with their Conferences to generate much needed revenue and to re-engage with their membership.

It is encouraging that 69.51% of the respondents are planning to attend their next 'in person' conference within the next 6 months.

Q. How do you plan to travel to your next 'in person' conference?



Conference organisers have always encouraged their delegates to be 'green' and use public transport wherever possible.

The respondents appear to be more cautious in the use of public transport as whilst 42.74% of respondents plan to travel to their next conference by train, 32.26% plan to travel by car. Encouragingly, 20.16% will travel by plane.

If we compare the age groups, 36% of the over-45s would travel by car compared to 29.63% of the under-45s, we need to be mindful that this may be driven by car ownership.

In terms of gender, 34.97% of females would travel by car compared to 26.58% of males. With regard to travelling by train, 51.9% of males would do so, compared to 38.65% of females.

Based on the demographics of an organisations' membership, it would be prudent for conference organisers to note the gender and age travel preferences and aim to accommodate these requirements e.g. parking facilities at venues

Conclusions

Conclusions

Following 16 months of Virtual Business Conferences, the results of the ABPCO Delegate Confidence Levels Survey indicate that there is a good appetite for the return of 'in person' conferences and whilst there appears to be caution amongst some respondents, the overall picture indicates that confidence levels are encouraging.

Key Take-outs

Key take-outs from this ABCPO Survey include:

- An overwhelming **93%** of respondents miss the networking, social interaction, and meeting people
- **47%** of respondents are happy to attend 'in person' events, this rises to **75%** if the individual is fully vaccinated.
- **34%** of respondents want to see additional measures in place at their conference
- **71%** of respondents want flexible cancellation terms for registration fees if unable to attend due to Covid.
- **70%** of respondents will be attending their next event before March 2022 (this is likely to be driven by timing of their specialist conference)
- **32%** of respondents will travel to the next conference by car, **43%** by train, **20%** by plane

So, what does this mean for us as the Events Industry? As an industry, we need to consider how we can use this information to give delegates additional confidence as they return to events. Key improvement areas include:

1. Increase Networking Opportunities within Events

The overwhelming response from the survey is that respondents genuinely miss the networking, social interaction and meeting people. As the industry starts staging events, it is important that opportunities are created to allow delegates to have the networking and social interaction that they have missed over the last 16 months.

Networking is often an integral part of conferences, but since 93% respondents have stated that this is the key conference element they have missed, it is an opportunity for the Events Industry to be creative and consider new ideas to facilitate the social interaction amongst delegates.

Social Programmes can be perceived as a 'jolly' and not 'business' and there has been a decline in the level and interest in conference social programmes over the years, maybe this is the time to reflect and consider their implementation to improve the conference experience and wellbeing for individual delegates?

“Moving forward together”

Conclusions

2. Introduce Measures to Encourage Confidence Levels

Nearly half (47%) of respondents are happy to attend 'in person' conferences without any additional measures being put in place. This rises to 75% if the individual is fully vaccinated. 15% state that they do not plan to attend 'in person' conferences for the foreseeable future.

Some individuals remain cautious and 34% of respondents want to see additional Covid-safe measures in place at their next conference, predominantly visible measures such as increased hygiene measures. Schemes such as 'Good to Go' will be important for venues as they seek to reassure both conference organisers and attendees.

Overall, these results are encouraging, and confidence levels should continue to rise as the UK and the rest of the world return to normal day to day life post-Pandemic.

3. Introduce Flexible Covid Cancellation Terms for Registration Fees

Traditionally, cancellation terms for registration fees have been perceived as strict with little room for manoeuvre, however, the Survey results indicate that if an individual has to cancel their conference due to a Covid related incident, then they would expect a flexible cancellation policy.

Many other industries have flexed their policies to accommodate a shift in client's expectations around the impact of Covid e.g. Travel Industry. The Events Industry should aim to have a more flexible approach in terms of cancellation fees for registration otherwise this could be an inhibitor to delegates choosing to commit to attending an event.

4. Accommodate Reduction in use of Public Transport by Delegates

Traditionally, pre-Covid, delegates were actively encouraged to use public transport, particularly for those events held in cities.

Post-Pandemic, there appears to be a reluctance amongst some of the UK population to use public transport and this is reflected in this survey where less than half will use the train to attend a conference.

Whilst this may change as we get used to 'living with Covid', the current change in behaviour needs to be recognised and accommodated by Event Organisers.

“A fresh pair of eyes”

Conclusions

5. Continue to Maintain a Flexible Approach

During the last 16 months, the Events Industry quickly adapted so that conferences and events could still take place, albeit, in the new Virtual World. Whilst emerging from the Pandemic, it is important that the flexible approach that was taken by both conference organisers and venues continues to be maintained as the Events Industry evolves in a post-Pandemic world.

The ABPCO Delegate Confidence Levels Survey is a snapshot of the current climate. As the vaccination roll out continues and confidence amongst the UK population increases, this will be reflected in those who participate in conferences and therefore delegate confidence levels should continue to rise.

However, it is important that the results of this ABPCO Survey are taken into consideration in the future planning of conferences so that delegates can attend conferences with confidence in their organisation, their conference organiser and their conference venue.

“Working together in partnership”

Appendices

1. How many external professional business conferences connected with your current role have you attended virtually since the start of Government Restrictions in March 2020? (A conference is defined as an event with over 50 delegates)
2. Which key elements of attending a conference 'in person' do you miss?
3. Which statement(s) describe your current comfort level about attending an event 'in person'?
4. If the Conference was implementing additional measures communicated in advance, what would encourage you to attend?
5. When do you plan to attend your next 'in person' Conference?
6. How do you plan to travel to your next 'in person' Conference?
7. Age group
8. Gender
9. Location
10. Conference sector

Contact Details



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The Association of British Professional Conference Organisers (ABPCO) is the UK's leading Professional body for Association Conference & Not-for-profit Event Organisation. We are a growing organisation and welcome new members.

ABPCO is one of very few UK conference and event industry associations to select Full and Associate Members based on peer assessment. This means that clients and suppliers can expect ABPCO Members to deliver business and ethical standards in the management of national and international association & corporate conferences, seminars, meetings, exhibitions & other events.

Bramcote International is a bespoke consultancy specialising in the Events Industry offering a range of services for Associations, Venue and Events.

We are a 'fresh pair of eyes' and specialise in futureproofing and growing business, development of sales strategies and activity plans, market research, venue benchmarking and sourcing, people development, bespoke training – to name but a few of our recent projects.

We are proud to have worked with major associations and conference venues as an integral part of their teams – click on the link below to see they say about us!

[Testimonials — Bramcote International](#)

Like to know more...

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