



# Conference & Event Industry Post-COVID-19

## Think Tank Outcomes Report

*UCSF Conference & Event Services  
April 2021*



## Summary of Findings

By the time COVID-19 gathering restrictions are finally lifted, event venues across the globe will have been shut down (or nearly so) for well over a year. Because the pandemic impacted the conference and event industry both severely and over a prolonged period, Think Tank members thought this industry would emerge from COVID-19 permanently changed in profound ways.

The lengthy closure period provided technology developers ample time to refine their offerings and online options are now well-liked, well-used. The long hiatus from travel and attending in-person meetings also gave human behavior sufficient time to adapt to the comfort of “zooming” from home. These factors created fertile ground for new norms to root deeply.



The good news is that new conditions will enable the business line to grow beyond the boundaries of a ballroom and give rise to more creative uses of physical space. Of further relief to the business line is the prognosis that technology will never fully substitute every type of in-person gathering; the literature is replete with evidence that human beings are inherently social. Because of these reasons, ‘high-value’ in-person gatherings are expected to gradually increase and return to levels close to pre-COVID-19 headcounts.

Low-value, in-person gatherings will be forced to change if they want to rebound - or be reinvented online.

## Think Tank Purpose & Composition

UCSF’s Department of Conference and Event Services wants to provide the appropriate amount of space and types of services to meet demand for conference and event related activities, taking into consideration that COVID-19 has had permanent and substantial impacts on this industry.



To help with this planning, the department established a “Think Tank,” and this report summarizes the group’s forecasts, recommendations, and insights. While the Think Tank focused on UCSF, the Report’s outcomes are intended to help all conference services and event venues. After all, COVID-19 impacts are not unique to UCSF.

Selected Think Tank participants are thought leaders, bold in their thinking, willing to (politely) challenge others, potential consumers of the services being evaluated, and known for using interdisciplinary techniques to solve problems. Participants represent diverse backgrounds (age, gender, race, etc.). Although some participants have specialized backgrounds in conference services and/or related fields (hospitality, tourism, A/V, etc.), to avoid industry bias many were deliberately selected from outside the industry. Participants included members from the UCSF community, as well as many individuals unaffiliated with the University. The participant roster is in Attachment A.

The Think Tank met twice, each time for 1.5 hours, in the months of January and February 2021. All meetings were conducted via Zoom and facilitated by Suzie Kirrane, a staff member within UCSF's division of Campus Life Services. During the meetings, Think Tank members expressed their own personal opinions, and not the views of the company or organization that they represented. As such, all participant comments are referenced in this report without attribution.

The Think Tank report does not represent a formal research study; rather, the intent of the exercise was to assemble thinkers during a crisis and informally answer the three questions below.

1. Has COVID-19 permanently changed the conference and event business line towards online or hybrid online (i.e., has there been a paradigm shift)? Or, will the traditional structure of meeting in person and within a conference facility be back just as soon as it's safe to gather, travel, and once budgets have recovered?
2. Is the experience of attending a conference in person (the buzz from presenting, focused time away, etc.) a relevant model for networking, engagement, wellness, and promotional opportunities? Or, can this experience be adequately replaced with online or hybrid online conferences?
3. Is operating a dedicated conference center in San Francisco an ideal use of campus space to support innovation and advance missions in health care and health sciences? Or, are there long-term shared or alternative uses that should be considered to optimize use of space?

Because there were a number of uncertainties in January and February 2021 that made forecasting challenging, such as a slow vaccine roll out and emerging COVID-19 variants, the Think Tank agreed to reconvene later in 2021 and revisit the forecast and recommendations.

## Measure Before You Go

Since technology has proven to effectively deliver many types of learning materials and facilitate information exchanges, Think Tank members thought that more Return on Investments (ROIs) would be conducted to measure which meetings are worth the travel costs and time away, versus which could be watched virtually at a fraction of the expense (or even for free!). Prior to the pandemic, only some events had virtual options, so calculating an ROI to determine which method had the higher value was neither common nor necessary.

### Quotes:



*“All meetings have objectives but not all meetings have the same weight.”*

*“More measures will need to be in place before attending in person.”*

*“Faculty might only have \$2K in their annual budgets to travel. Given limited funds, they pick their conferences carefully.”*

## Most Likely to Succeed

This ROI exercise is expected to put pressure on lower-value gatherings. These will either need to change to attract in-person attendance or be ready for attendees to select the online version as the better alternative. Think Tank members defined lower-value, in-person conferences as those held in impersonal settings, like large ballrooms and other mega venues. Those conducting ROIs might ask: is it necessary to travel across the country just to watch speakers from a jumbotron?

In contrast, high-value conferences are expected to again attract strong in-person attendance, once budgets recover and safety concerns lift. High-value conferences typically include interactive discussions; teaching and credentialing sessions; hands-on demonstrations; and intergenerational meetups. These high-value gatherings tend to take place in intimate settings, such as in small breakout rooms. Other high-value components include networking that occurs ad hoc and afterhours in hotel lobbies, restaurants, and bars, getting away from the grind, visiting interesting places, and dedicating time to focus on professional development.



Weaving all this together, a high-value, in-person conference could be termed a “social destination” – a special, transformed place that enables attendees to have a meaningful experience.

Fueling the discussion that high-value conferences will rebound is the fact that human beings are social animals and inherently desire togetherness. Although technology offers

many opportunities, as identified in this Report, it is not a substitute for the in-person interaction we're hardwired to crave.

**Quotes:**



*"Smaller and more intimate is more valuable. This is what has been missed."*

*"In-person must be revamped."*

*"Evening discussions lead to new business."*

*"Moving forward, maybe conferences should be smaller, more focused, shorter."*

*"People are triable."*

*"There are still things that need to be done in a physical space."*

*"Sometimes the location is conducive, so people bring their families – and you meet them. More personalized."*

## Recovery Timeline

As depicted in Exhibit 1, Think Tank members suggest that most in-person gatherings would remain cancelled in the 2021 calendar year, with a slight uptick in activity in the latter half of 2021. Continuing safety concerns -- thanks to a slow vaccine roll out and emergent COVID-19 variants -- are to blame for another few months of sunken in-person conferences and events.



The forecast is for in-person gatherings to resume in earnest beginning calendar year 2022. In Q1 and Q2 of 2022, in-person attendance is expected to remain half of 2019 levels and gradually rise toward the end of the year to three-quarters of 2019 levels. Slashed budgets due to the economic downturn combined with some persisting safety concerns are reasons to temper enthusiasm about a full recovery in 2022.

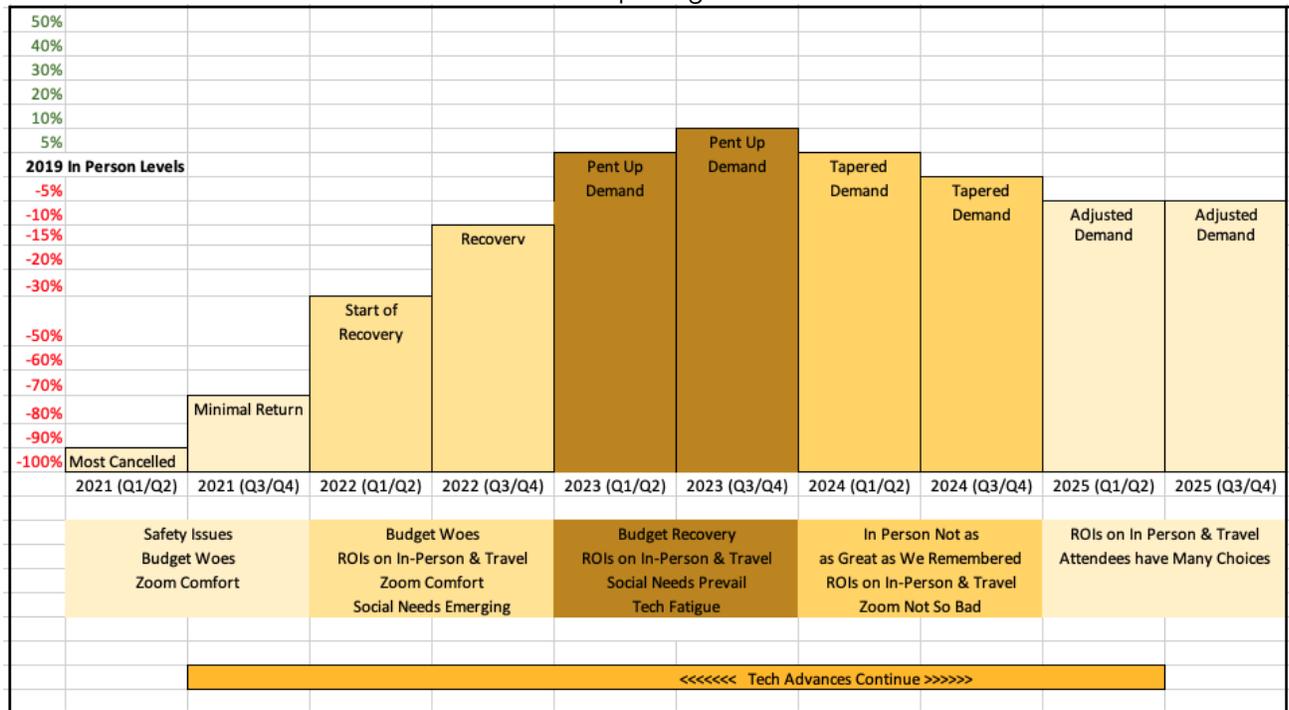
After years of being unable to travel and gather and with a healthier economy, the Think Tank thought that there would be "pent-up" demand in calendar year 2023 that would cause in-person headcount numbers to spike above 2019 levels.

This surge was forecast to be short-lived and expected to taper off starting in calendar year 2024, once the excitement of attending in-person conferences wore off and attendees realized that some conferences might be better consumed remotely.

In 2024 and 2025, in-person attendance was expected to reach its new post-pandemic norm, slightly below 2019 levels. Think Tank members commented that 2019 was a banner year for conferences and events, so having a new steady state close to 2019 in-person levels was considered a full recovery.

**Exhibit 1:**

Recovery Timeline Shows 2023 Head Counts Exceeding 2019 Levels, Before Tapering Off.



## Follow the Money

Conferences supporting certain industries, such as high-tech companies, are expected by some Think Tank members to have a slower in-person attendance recovery. This anticipated lag is because high-tech companies (and similar industries) tend to give their employees access to the latest gadgets, have employees who already spend a lot of time behind a monitor, and have material that can be more easily conveyed online. Organizers of conferences from high-tech companies also tend to have more money and can “buy some time” to experiment and feel less rushed to organize an in-person conference.

Conference organizers from other industries may not have this luxury, especially associations that use their in-person events as the primary way to fundraise. Although participant numbers have increased with the online option, the flow of money into these

associations was significantly curtailed. If these associations cannot attract people to the venue or completely reinvent themselves online, it will hurt their bottom line.



As such, in-person events that will return first will be those hungry to earn money from on-site attendees, including tradeshow vendors. Returning later are those events less reliant on having the conference as the major source of income.

**Quotes:**



*"We have found attendance has skyrocketed with online - but without money coming in."*

*"Associations with annual events, this is the one time of year for their fund raiser. If they can't bring people in, it hurts their annual fundraising."*

## The Change-Agent

In a post-pandemic state, advances made in technology will have played the biggest change-agent role in the conference and event line of business.

While many conferences were already harnessing technology pre-COVID-19, such as by recording or broadcasting sessions, the scale of investment, pace of development, and quality of production all skyrocketed during the pandemic. Attendees, speakers, and producers are now comfortable with using technology, so much so that big name speakers are invited -- without hesitation -- to deliver presentations online. Had COVID-19 conditions not persisted for so long, technology may not have advanced to such a sophisticated level and manifested so deeply into the business.



At this point, there is no turning back. Online options will be the standard in a post-COVID-19 norm. In fact, the Think Tank was certain that technology would continue to advance, become less expensive, and add even more bells and whistles, keeping the traditional in-person conference model on its toes - forever.

Despite the threat, as explained in various sections of this Report, most Think Tank members thought technology would augment in-person conferences rather than threaten to fully replace them. Most vulnerable for full technology replacement are big lectures and meetings.

**Quotes:**



*“There is no going back.”*

*“Event strategies are multi-channel.”*

*“When we come back, there will be a hybrid model.”*

*“Work and learn from everywhere.”*

*“In the beginning, would not have felt comfortable bringing in big speakers without the [IT] investment. Now feel more comfortable.”*

*“There is a new baseline of reliability.”*

## Online is “Just Okay”

On a personal level, Think Tank members made clear that attending in-person conferences did more to effectively advance their professional development and engagement at work compared to online participation. However, they did not suggest that online meetings were a disaster.

To capture their opinions, Think Tank members were asked to take two “pulse polls.” They rated their experiences with in-person meetings (pre-COVID-19) and online meetings (during COVID-19) in terms of both their professional development advancement (poll #1) and engagement at work (poll #2). Since the sample size was tiny (10), the fun and informal exercise involved selecting from five emojis: very happy, happy, neutral, sad, and very sad.

Poll ratings for in-person conferences are shown in Exhibit 2, below. When reflecting on their experiences with in-person conferences, 50% rated their experiences with a very happy emoji and 40% with a happy emoji for both professional development and engagement at work categories.

**Exhibit 2:**

Traditional Conferences and Impact on Professional Development



Engagement at Work



When Think Tank members were asked to reflect on their experience with online conferences over the past year in terms of professional development, only 22% rated their experience with a very happy and 33% with a happy emoji. When rating the impact of online conferences on their engagement at work, no one rated the experience as very happy and 40% rated their experience with a happy emoji. Poll ratings for online conferences are shown in Exhibit 3, below.

**Exhibit 3:**

Online Conferences and Impact on Professional Development



Engagement at Work



**Quotes:**



*“Exhausting - digital fatigue.”*

*“Somethings get lost in translation online.”*

*“Online doesn’t get the sales team pumped up.”*

*“Virtual can augment “size” but never be a replacement for the better learning.”*

*“They like technology because they are getting what they need. But they say I hope you’re back in person next year.”*

*“Students hate this [online]. Can’t meet the scholarly needs. We need to be together to exchange.”*

## Good for All Ages

Age did not appear in Think Tank discussions to be a significant factor in preferring online over in-person meetings. There was an assumption by some that junior employees who had never been to in-person conferences and who “grew up” working and learning remotely would prefer online. However, junior Think Tank members debunked that assumption and expressed high interest in traveling to a conference as part of their professional development journey. Whether employees are junior or seasoned in their careers, there was a craving to be at the conference table.

**Quote:**



*“Even though I have not yet been to a conference, it is something I would like to do to develop professionally.”*

## Biggest Opportunities

Access to conference material is forecast to explode as technology enables a potentially endless number of participants. One Think Tank member used the analogy of the Super Bowl where only a small portion of interested people can attend the live event, but millions have access to the event via TV and other broadcast modes. This same sort of scale could

now occur with conferences that were constrained by the physical boundaries of brick-and-mortar venues.

Using the sports analogy again, the Think Tank discussed that sometimes people want to attend a sporting event in person and other times want to watch an event from the comfort of their home. Technology now gives people this same choice with conferences.



For some who may not be able to attend an in-person conference given childcare or eldercare responsibilities, the virtual door can now swing open.

Technology also provides the option to extend the length of a conference beyond the traditional two to three days.

With technology, there's no reason why members couldn't participate over a longer-period, perhaps even throughout the year.

**Quotes:**



*"Reach a greater number of people. Seen it grow tremendously from in person."*

*"Our reach has been astronomical (online)."*

*"Used to do 40 and 50 people. Now doing this more often with 5 times more people. No space restrictions."*

*"Reach those who couldn't previously access."*

*"Hybrid will continue to reach a broad audience."*

*"Future is not radically different, radically closer."*

## **High Alert! Be Inclusive and Ensure Access.**

Although casting a wider net holds a lot of promise, Think Tank members cautioned that, if not done carefully, a great divide will be created between those who are financially and socially privileged and those less so. Specifically, those who have access to resources will have money to travel, stay in a nice hotel, and attend in-person while those without resources will get a lower quality, online option. The Think Tank agreed that if not vigilant as an industry, unfair access will cause further socio / economic divide, a terrible concern at any time and especially now as diversity, equity, inclusion and access (DEIA) must be a priority for all.

One suggested way to level access is for conference and event organizers to provide scholarships and other support to help those without resources.

#### Quotes:



*“Justice, Equity, Diversity, Inclusion (JEDI<sup>1</sup>) is a barometer.”*

*“More inclusive and broader input.”*

## Predicament at UCSF

A common structure at many universities is a large conference center (Luskin – UCLA, Kellogg – Michigan State, Statler – Cornell). At UCSF, the Mission Bay Conference Center (designed by the award-winning Mexican architect Ricardo Legorreta) stands center stage. Before COVID-19, off-campus and on-campus organizers used the Center to foster innovation and advance missions in health care and health sciences. The Center was operated by Aramark prior to the pandemic, and the company was contracted to provide “corporate hotel quality” sales, A/V, catering, and event services. Use of Aramark’s catering was required when food and beverage was part of the meeting, and some exceptions were allowed with an overhead fee paid to Aramark.

Although the Center’s customer service ratings were high, UCSF’s internal customers often complained they could not afford to use the Center. Even after more discounts were introduced to improve access for UCSF patrons, the majority of the Center’s business remained generated from off-campus clients.

Across the street from the Center, a new campus building (Mission Hall) opened a few years ago with beautiful classrooms that, when not in use for education, can be booked for free by UCSF conference organizers. Those who want food and beverage for their events in Mission Hall can order catering from the vendor of their choice. An even newer and nicer academic building (Clinical Sciences Building) will be opening up across from the Millberry Union Conference Center on the Parnassus Heights Campus in the summer of 2021. These rooms will also be available for free, when not in use for teaching.

Educational space is available at UCSF for free because classrooms are funded by central funds and the operation of these spaces does not rely on rent revenue. In contrast, UCSF’s conference centers are auxiliary enterprises and depend entirely on revenue generated from room rental and other fees.

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<sup>1</sup> JEDI, Justice, Equity, Diversity, and Inclusion is a similar term to DEIA, Diversity, Equity, Inclusion, and Access



Even before COVID-19, there were growing concerns about the unintended competition that these new, free classroom facilities placed on auxiliary-operated conference centers. This problem is expected to amplify in a post-COVID-19 norm, since budgets for conferences and events are expected to be constrained for several years and the free choice will become the ‘no duh’ choice.

Internal to UCSF, there are discussions underway with the Budget Office to help level the playing field between core funded and auxiliary space.

**Quotes:**

*“The Center is priced out of the market.”*



*“The more money the organizer had, the better the space looked. There is a fundamental disconnect between those departments that have funds to host fancy programs vs reality.”*

## Blended-Use Space, Reimagined

The creative use of space around the country during COVID-19 brings to light the strong possibility that “blended use” and “agile” spaces will be a best practice in a post COVID-19 era.

At UCSF during COVID-19, campus conference centers have been transformed to accommodate a range of new activities, including blood banks, patient-family waiting areas, summer youth camps, and YMCA learning centers. Most recently, the Mission Bay Conference Center was converted into a COVID-19 vaccine clinic. Many other event venues across the country have also been repurposed, especially into mass vaccination sites.

Other types of space owners around the country, such as restaurant and gym operators, have implemented creative changes during COVID-19, such as rolling out fake-grass carpet and turning parking lots into outdoor dining areas and gyms. Although there are weather-related challenges with outdoor dining and exercise classes, many restaurants and gyms are expected to continue the outdoor option in a post-COVID-19 norm given the experiment’s success.



Given what has transpired during the pandemic, Think Tank members thought long-term UCSF and other venue owners

should use existing space with more fungibility and in totally new ways.

In terms of fungibility, the Think Tank thought that with fewer spaces dedicated to a particular focus (just education, just conferences, etc.) and more available for blended use, the space overall would be better utilized. One Think Tank member commented that when the Mission Bay Conference had a booked conference the area really came alive, both inside the venue and the hardscaped exterior quad. However, she also noticed that on the many days when the Center was not booked, the area felt hollow. If the price is right and the conference center becomes more welcoming to varied purposes, including educational courses, it should be full regularly and the place should be consistently vibrant.

In terms of reimaged purposes, the Think Tank had all types of ideas, including more pop-up concepts whereby space could be quickly assembled and then disassembled depending on the client's needs. Pop-up gyms, pop-up yoga, and pop-up health clinics were included in examples. Anticipated high demand uses that could be accommodated in reimaged venues included space for social and community gatherings, collaboration, and places to work on products. To best accommodate blended use, it was mentioned that more raw space was needed, whereby A/V and other accessories were not built into the room but, instead, brought into the space based on the event type. Using greenery to help with social distancing and pleasantly divide the areas was also a nice idea.



Strategically, participants thought universities could use their space more effectively to engage alumni (and other interested parties) as life-long learners. The term “dip in and dip out” was used as a way to describe potential life-long learners who may want to come in and out of the university, virtually and/or physically.

Right now, alumni tend to physically return to their alma mater campuses on rare occasions, such as for a 10-year reunion. However, with the “dip in and dip out” model, a university could consider them life-long learners as opposed to having graduates who never come back (neither on-line or in-person).

Long-term, this means that UCSF and other universities and venue owners are likely not to scale back at building new structures, but that they would be creating entirely different types of spaces.

#### Quotes:

*“This feeling of “emptiness” is not the right vibe in San Francisco – where space is at a premium – and on a vibrant campus.”*



*“Think of a life-long student center – a subscription-based model.”*

## UCSF As A Resource

A growing number of San Francisco-based companies are offering their employees the option to move to lower-cost regions and work remotely. Due to this, many companies are downsizing the amount of office space they lease in the City. Because these companies will have employees scattered – potentially around the world – it is likely that many will want occasional in-person meetings in San Francisco. With smaller office leases that no longer include board rooms or other gathering spaces, these companies will be looking for meeting space in the City. Even within UCSF, some departments with large numbers of remote workers are expected to release their on-campus space to units with onsite workers and will need space for occasional all-staff meetings.



With this downsizing of office space, the Think Tank thought that UCSF could potentially advertise its venues as a meeting destination.

Along these same lines, with cuts in payroll, companies and university departments might not have event coordinators on staff to help organize conferences and meetings. UCSF conference and event services staff could evolve and provide expert event planning resources and not just the owner of space.

### Quote:



*“Consumers of conference services will be looking for more value.”*

## UCSF: A Destination!

Pre-COVID-19, when UCSF’s Mission Bay venues were operating and sales teams were reaching out to clients, the venues were advertised as being within the exciting City of San Francisco. However, the Think Tank thought UCSF as a destination within San Francisco and even within Mission Bay could be more heavily emphasized.

Of late, the Mission Bay region has become of interest to tourists and others visiting the City, especially now with the Chase Center next to campus and eclectic Dogpatch to the University’s south. There are increasing requests for tour buses to extend into Mission Bay, and now double-decker buses can be seen driving down some of the public streets that bifurcate the campus.

**Quotes:**

*“Separate UCSF from ‘just a space.’”*



*“Events need to evolve into more of a “retreat.” It should be an experience that restores you emotionally.”*

## Proceed with Caution

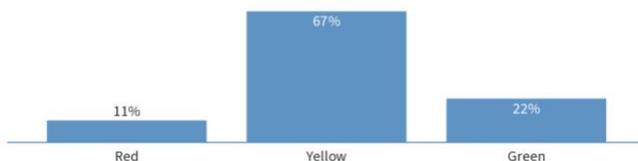
As a final exercise, the Think Tank was asked to choose a stop-light color (red, yellow, green) to describe the conference and event industry through 2024. As shown in Exhibit 4, 67% assigned the industry the yellow color, signaling caution. Eleven percent were more pessimistic and picked red. Twenty-two percent picked green and thought the industry was going to get right back on its feet just as soon as permission to gather is granted.

It will be interesting to see what transpires!

**Exhibit 4:**

State of the Industry in 2024 using stop light colors.

**Now that the think tank has discussed the challenges and opportunities facing the conference and event business, what stop light color (red, yellow, green) would you assign to this business line through 2024?**



**Quotes:**



*“Yellow: In the middle. People have to choose. Half and half. Half zoom and half in person.”*

*“Green: Will “go” as soon as we can.”*

*“Wish there would have been a blinking red-light option. We should all stop and look to right and left and proceed with caution.”*

*“Yellow: describes drivers breaking the rules. There will be passing, stopping, changing the pace, adapting. Those who are speeding up, going to get ahead?”*

*“Color will depend on meeting.”*

*“Green: Starving to be together.”*

*“Green: But slow start.”*

## Attachment A Think Tank Participant Roster

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