



2021 COVID-19 IMPACT STUDY

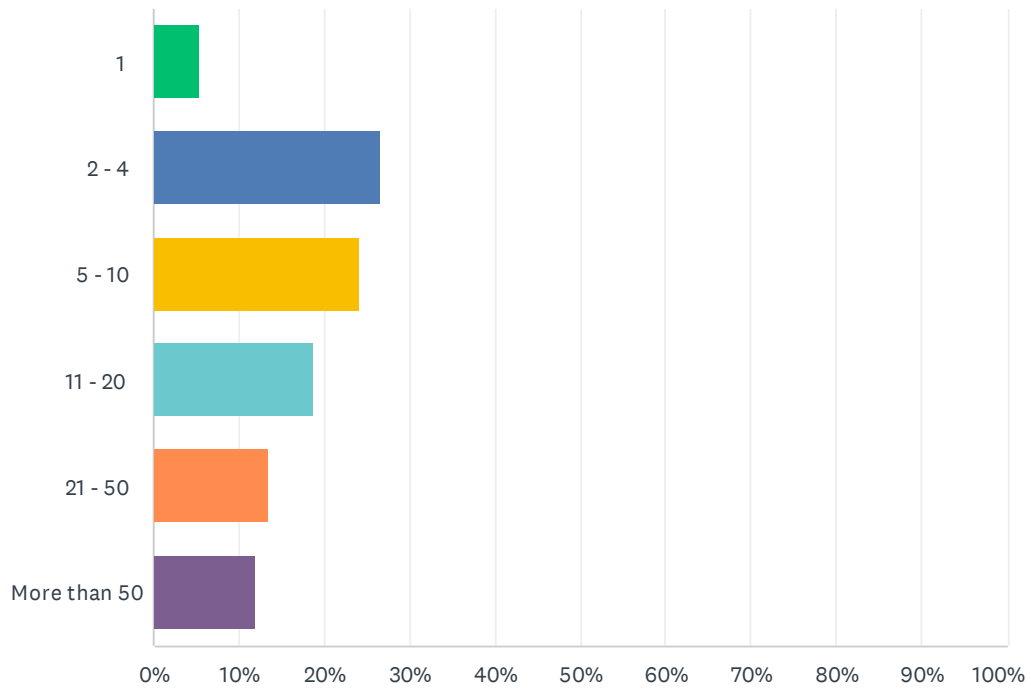
As part of a 2020-21 Strategic Initiative set by the Texas Society of Association Executives' Board of Directors, TSAE conducted a COVID-19 Impact Study on the Texas association and events industry.

The association wanted to gain insights into how the first year of the COVID-19 pandemic (March 2020 - March 2021) impacted our industry.

The TSAE Board of Directors thank the participating organizations for their time.

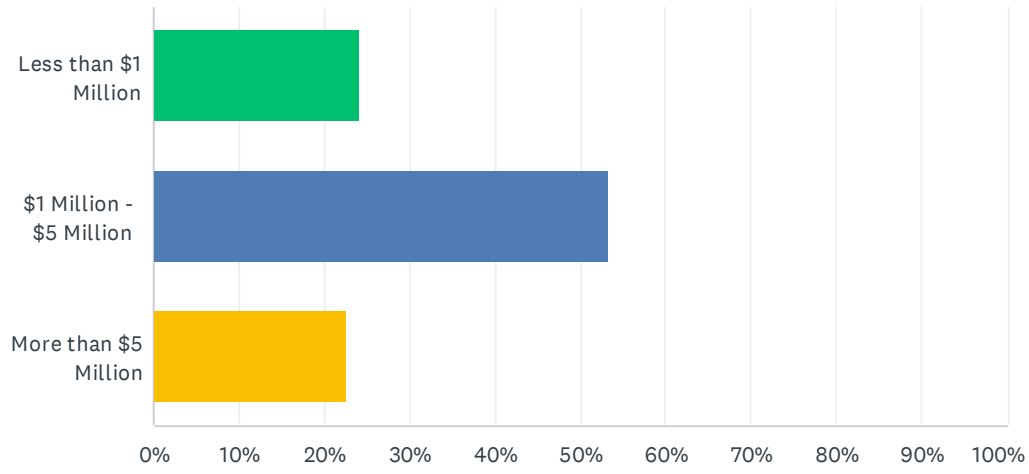
The following data was provided by 75 participating organization's in the summer of 2021 and represents COVID-19's impact on their associations from March 2020 – March 2021.

Staff Size (full-time employees):



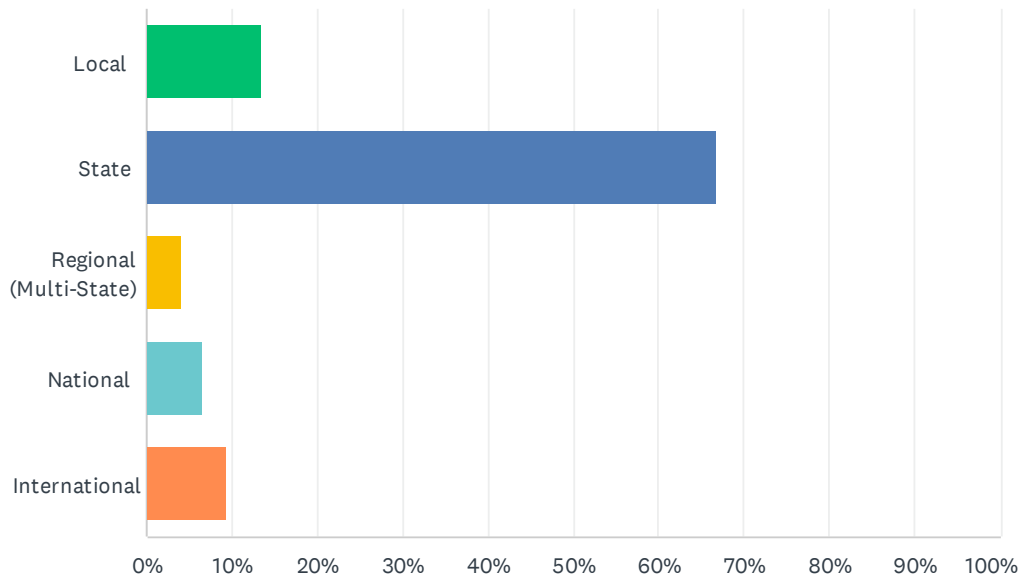
ANSWER CHOICES	RESPONSES	
1	5.33%	4
2 - 4	26.67%	20
5 - 10	24.00%	18
11 - 20	18.67%	14
21 - 50	13.33%	10
More than 50	12.00%	9

Annual Budget:



ANSWER CHOICES	RESPONSES	
Less than \$1 Million	24.00%	18
\$1 Million - \$5 Million	53.33%	40
More than \$5 Million	22.67%	17

Scope:

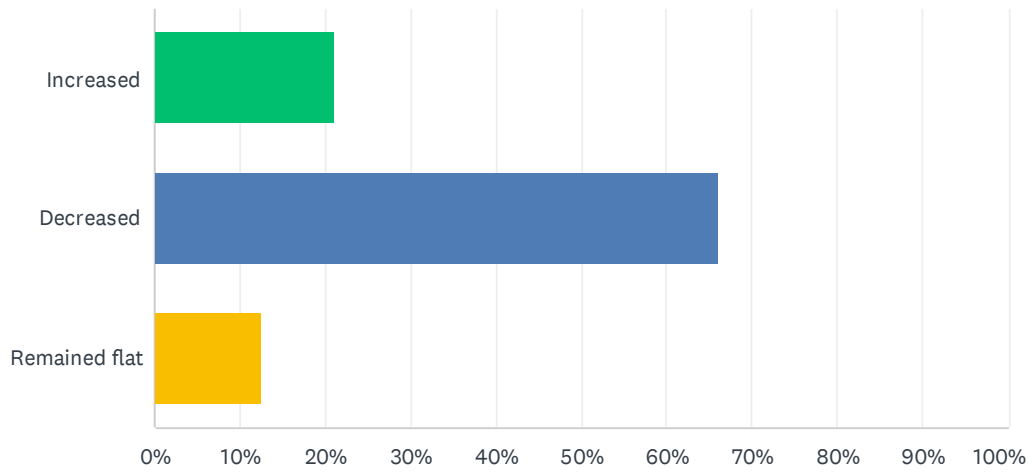


ANSWER CHOICES	RESPONSES	
Local	13.33%	10
State	66.67%	50
Regional (Multi-State)	4.00%	3
National	6.67%	5
International	9.33%	7

Impact on Association Operations & Personnel

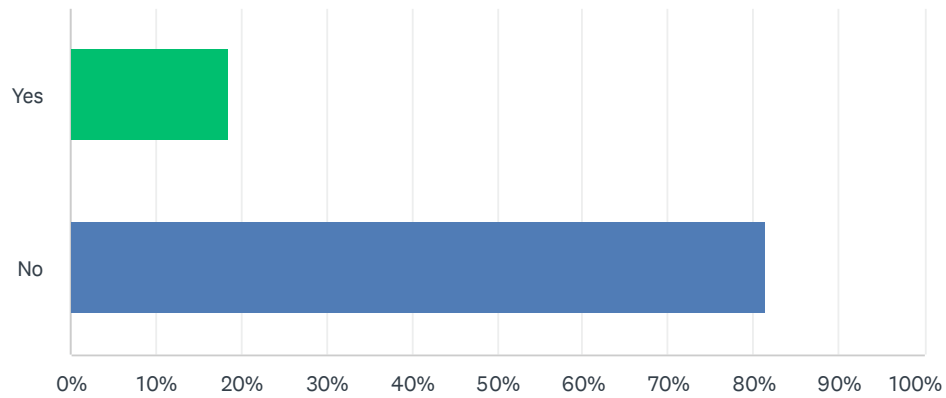


Our association's revenue:



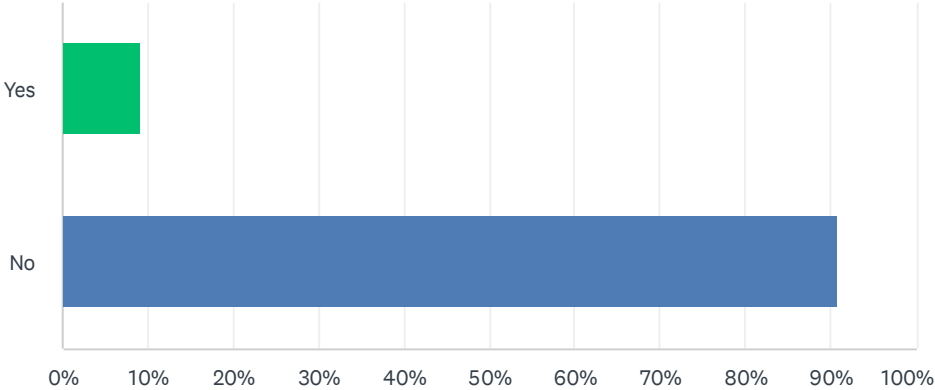
ANSWER CHOICES	RESPONSES	
Increased	21.13%	15
Decreased	66.20%	47
Remained flat	12.68%	9

Did you have to layoff any staff due to COVID-19?



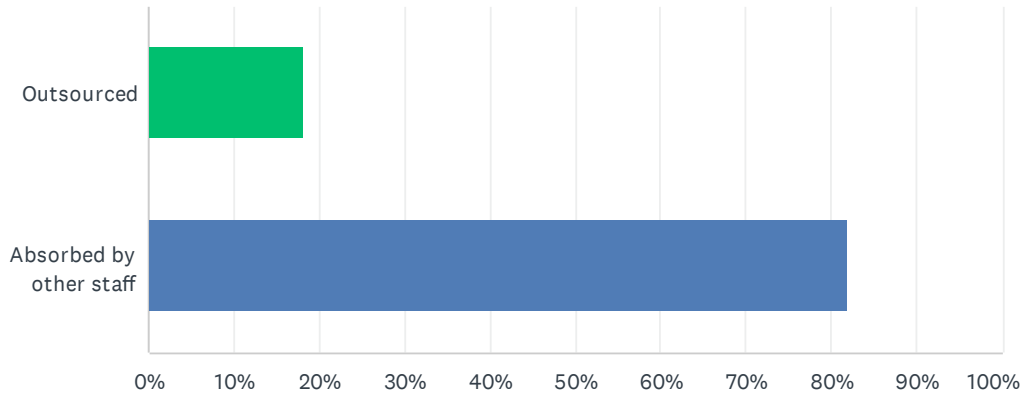
ANSWER CHOICES	RESPONSES	
Yes	18.46%	12
No	81.54%	53

Have you since rehired for these positions or have plans to in the next three (3) months?



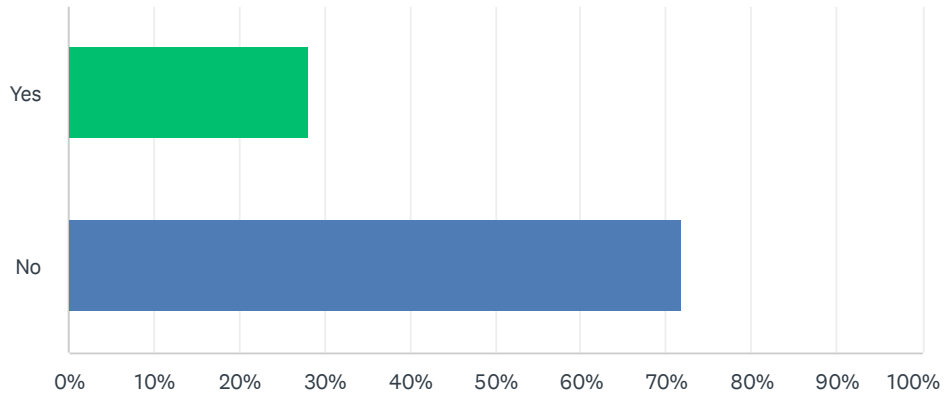
ANSWER CHOICES	RESPONSES	
Yes	9.09%	1
No	90.91%	10

The eliminated position's work was:



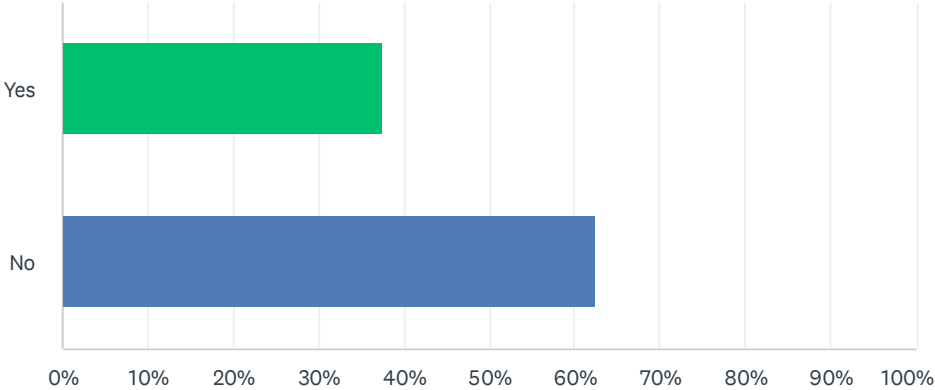
ANSWER CHOICES	RESPONSES	
Outsourced	18.18%	2
Absorbed by other staff	81.82%	9

Has your association had to touch reserves due to COVID-19?



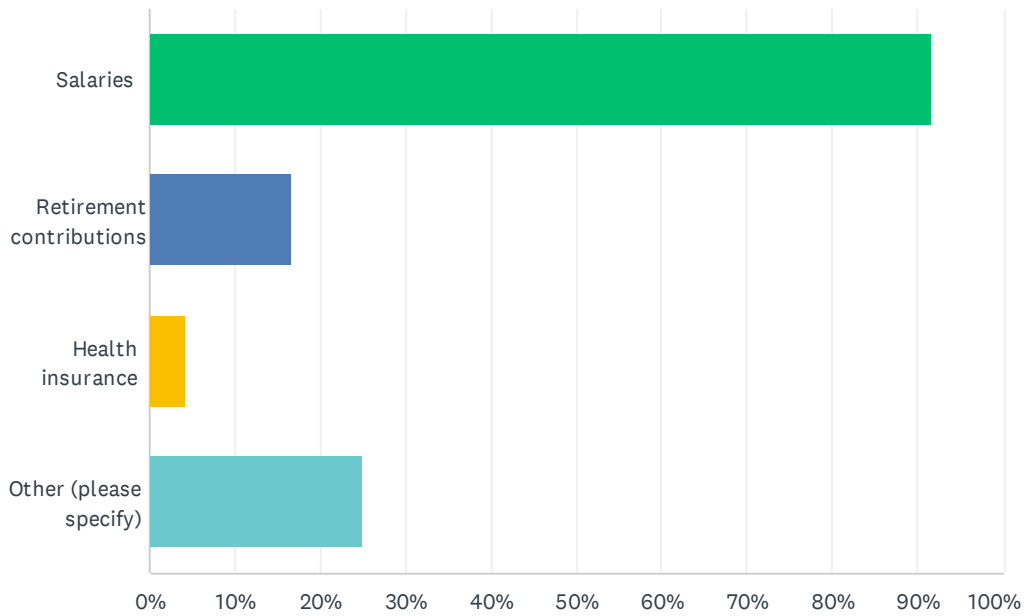
ANSWER CHOICES	RESPONSES	
Yes	28.13%	18
No	71.88%	46

Have you had to freeze or reduce staff salaries and/or benefits due to COVID-19?



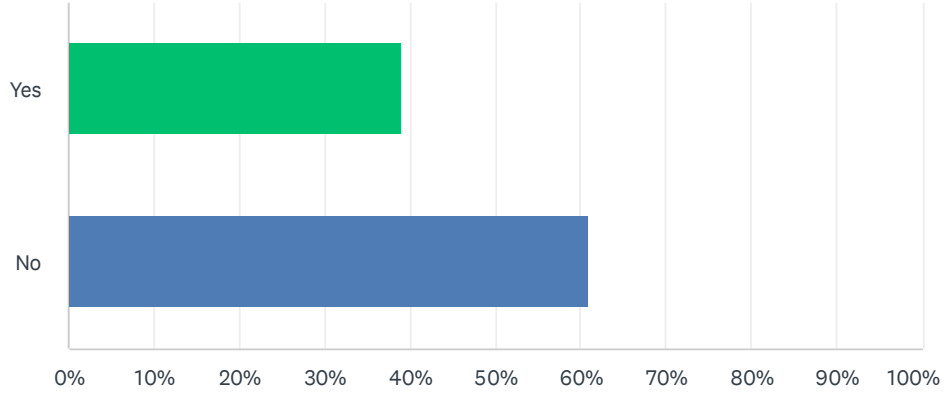
ANSWER CHOICES	RESPONSES	
Yes	37.50%	24
No	62.50%	40

Which of the following have you had to freeze or reduce?



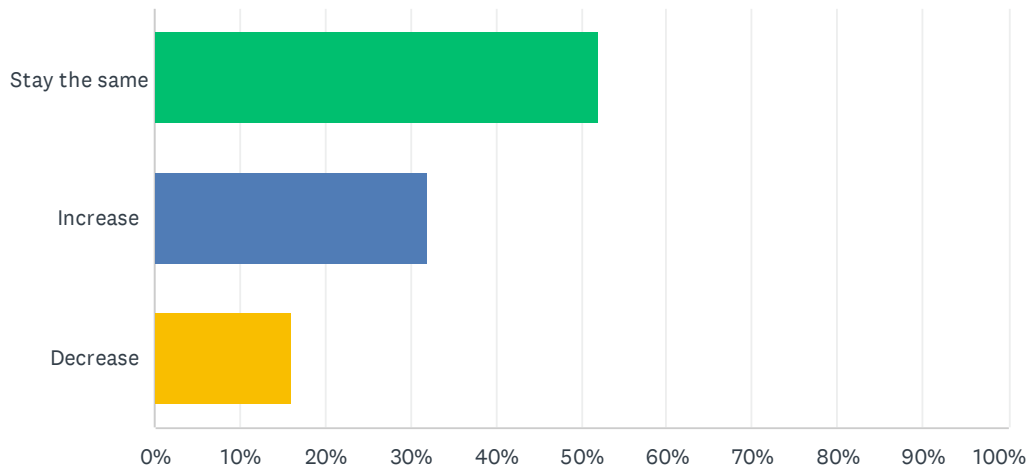
ANSWER CHOICES	RESPONSES	
Salaries	91.67%	22
Retirement contributions	16.67%	4
Health insurance	4.17%	1
Other (please specify)	25.00%	6

Prior to COVID-19, did you offer remote work opportunities to a majority of employees (at least one day per week)?



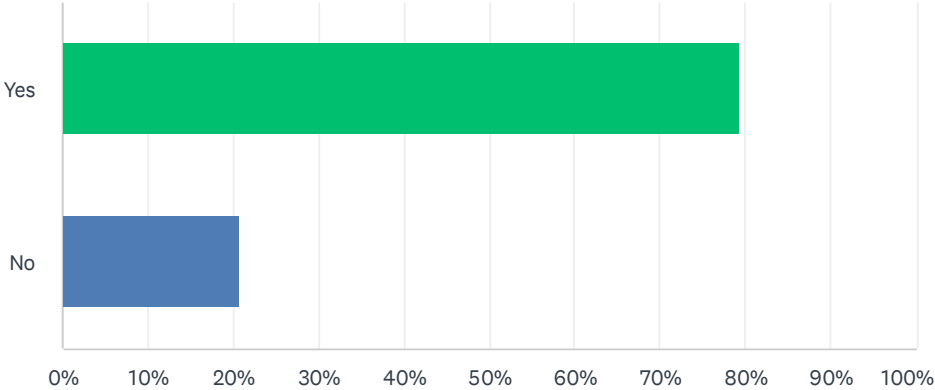
ANSWER CHOICES	RESPONSES	
Yes	39.06%	25
No	60.94%	39

Remote work opportunities following the pandemic will:



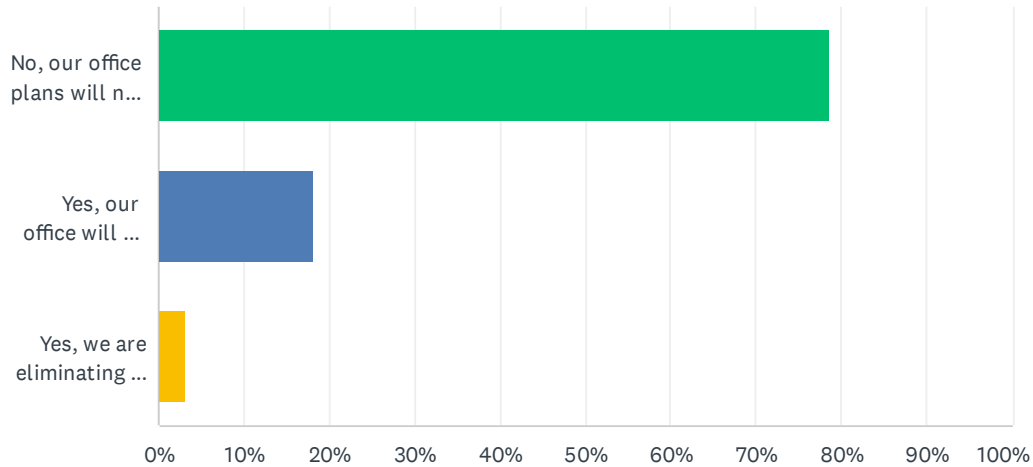
ANSWER CHOICES	RESPONSES	
Stay the same	52.00%	13
Increase	32.00%	8
Decrease	16.00%	4

Do you plan to offer remote work opportunities to a majority of employees (at least one day per week) following the pandemic?



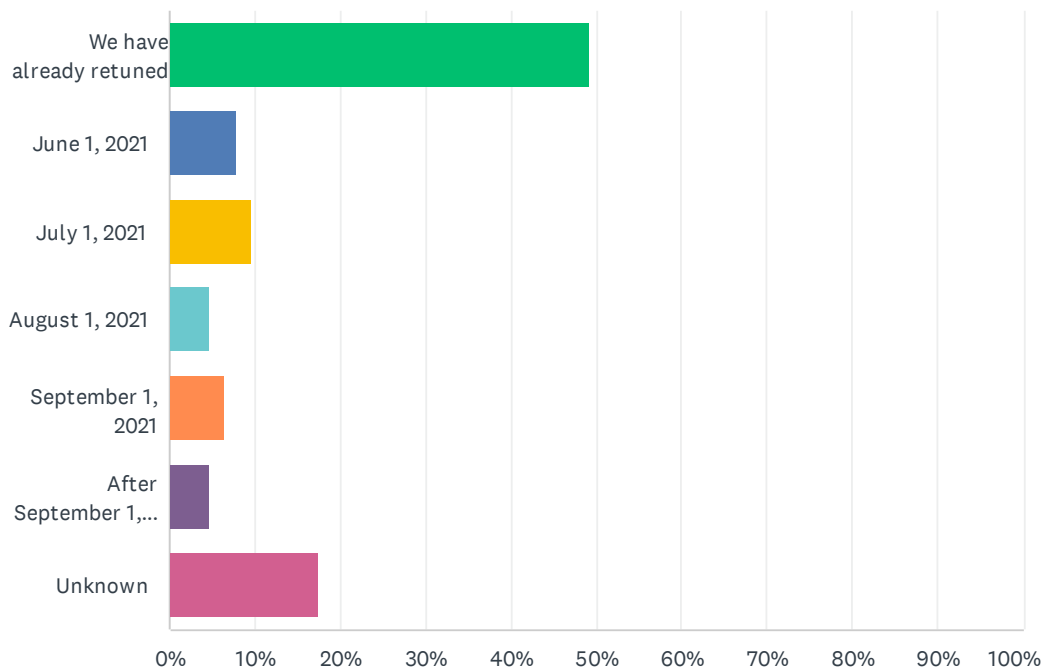
ANSWER CHOICES	RESPONSES	
Yes	79.37%	50
No	20.63%	13

Have you changed your physical office square footage, or do you plan to in the next two years, directly due to COVID-19?



ANSWER CHOICES	RESPONSES	
No, our office plans will not change	78.69%	48
Yes, our office will be smaller	18.03%	11
Yes, we are eliminating a physical office	3.28%	2

When will your office return (either to your pre-pandemic operations or what you have set as your new operations moving forward)?

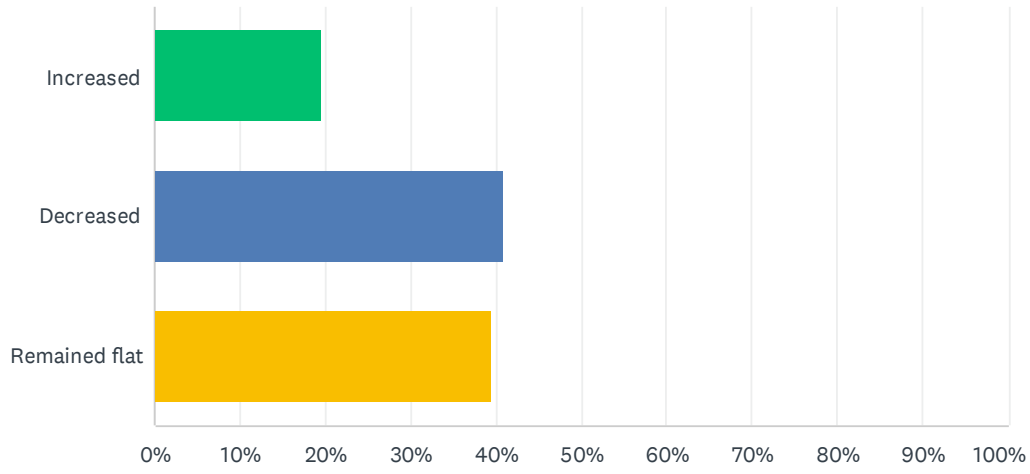


ANSWER CHOICES	RESPONSES	
We have already returned	49.21%	31
June 1, 2021	7.94%	5
July 1, 2021	9.52%	6
August 1, 2021	4.76%	3
September 1, 2021	6.35%	4
After September 1, 2021	4.76%	3
	17.46%	11

Impact on Association Membership

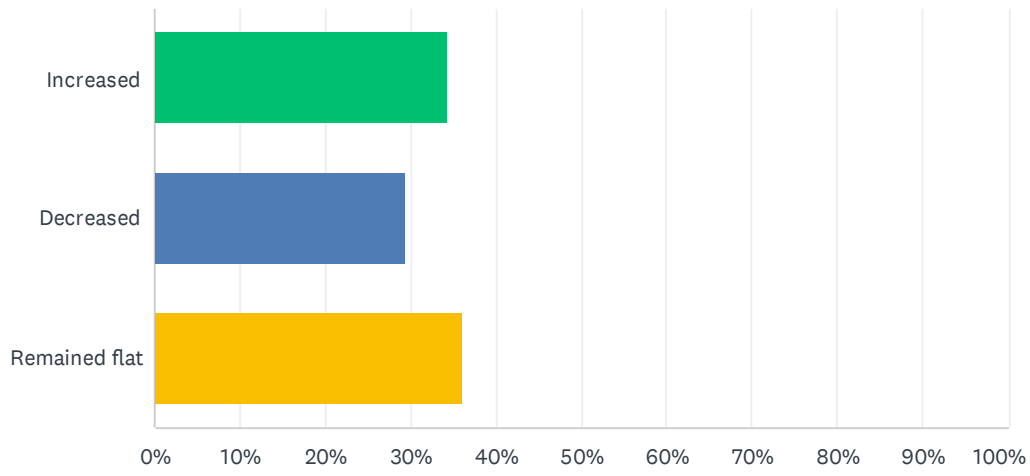


Our membership renewal rate:



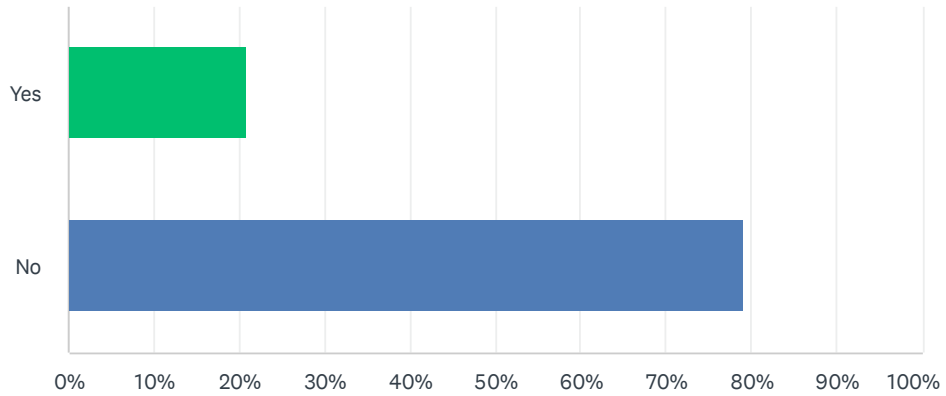
ANSWER CHOICES	RESPONSES	
Increased	19.67%	12
Decreased	40.98%	25
Remained flat	39.34%	24

Our new member acquisition:



ANSWER CHOICES	RESPONSES	
Increased	34.43%	21
Decreased	29.51%	18
Remained flat	36.07%	22

Q22 Did you change your dues renewal process due to COVID?



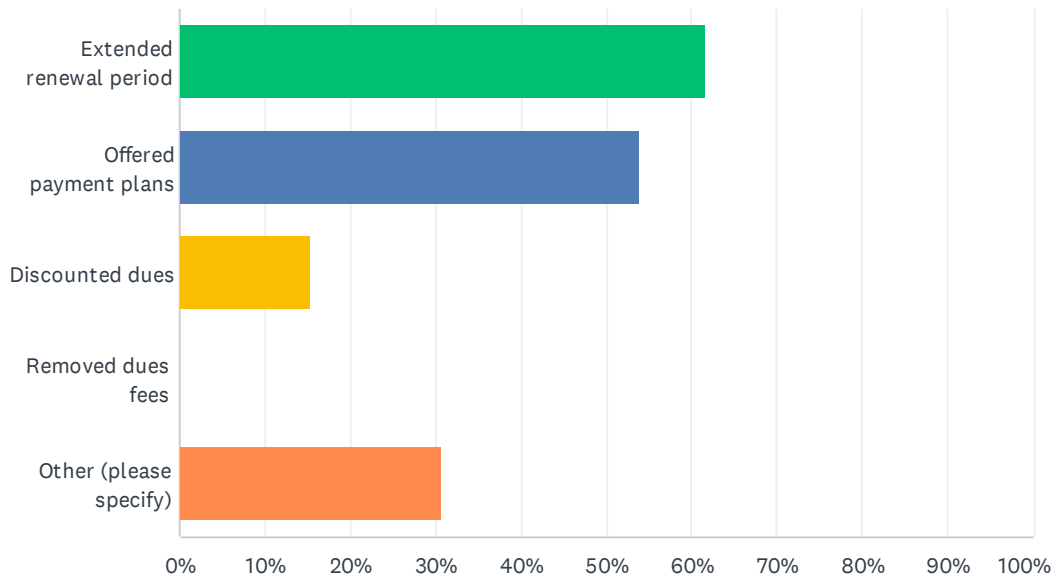
ANSWER CHOICES	RESPONSES	
Yes	20.97%	13
No	79.03%	49

Impact on Association Meetings & Events



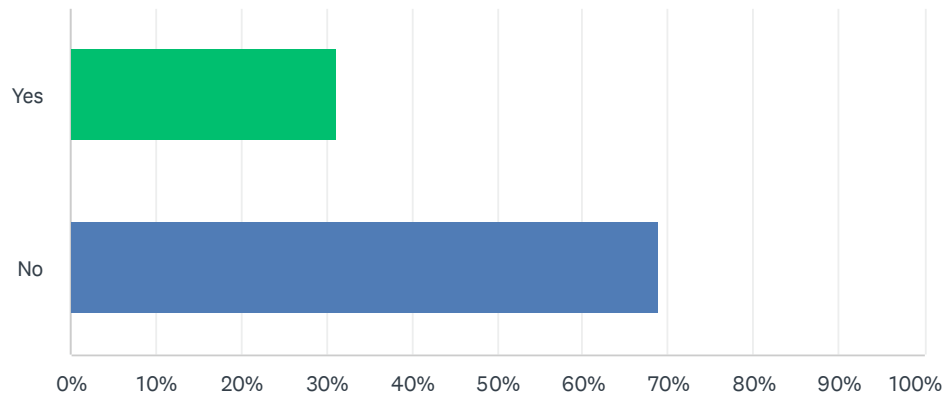
Q23 How did your renewal process change (select all that apply):

Answered: 13 Skipped: 62



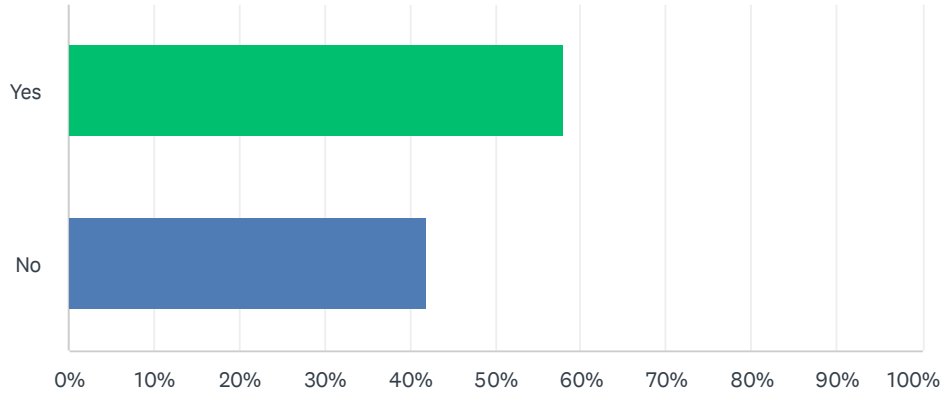
ANSWER CHOICES	RESPONSES	
Extended renewal period	61.54%	8
Offered payment plans	53.85%	7
Discounted dues	15.38%	2
Removed dues fees	0.00%	0
Other	30.77%	4

Did you hold any in-person events in 2020 after March 16, 2020?



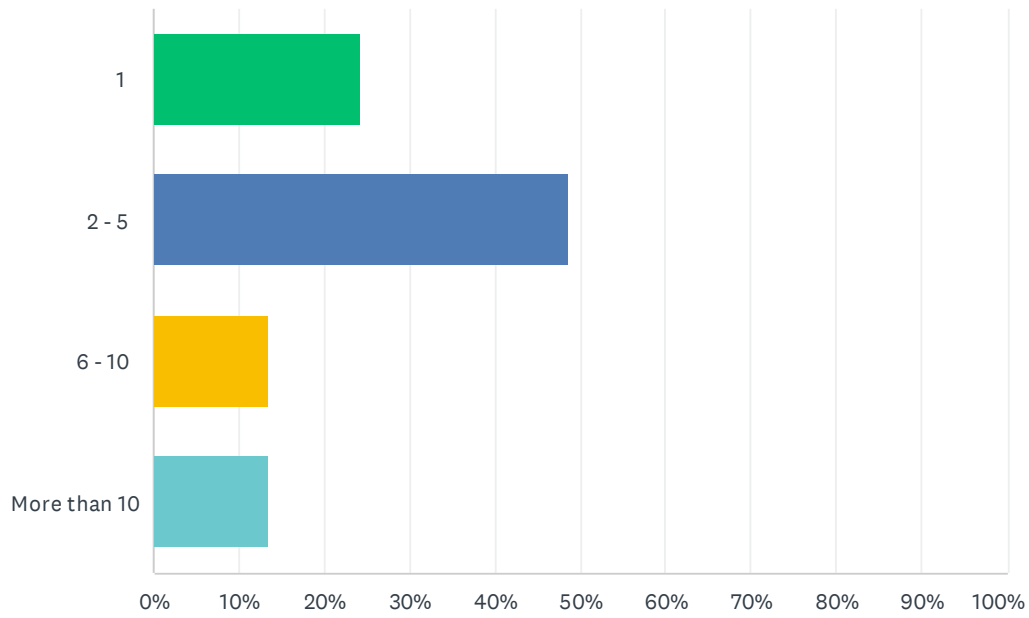
ANSWER CHOICES	RESPONSES	
Yes	31.15%	19
No	68.85%	42

Did you fully cancel any meetings/events at your organization due to COVID-19 (did not reschedule or move to virtual/hybrid)?



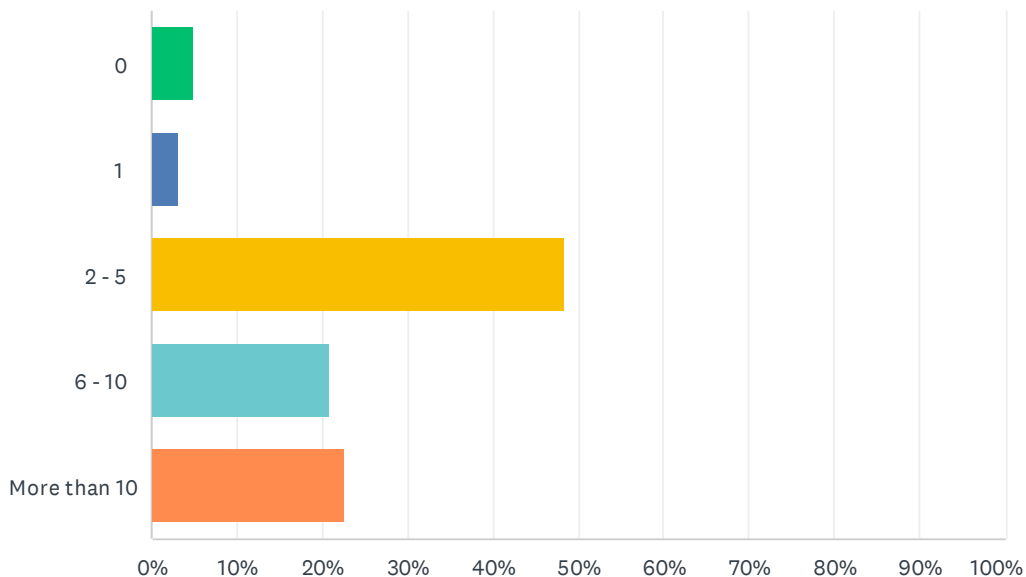
ANSWER CHOICES	RESPONSES	
Yes	58.06%	36
No	41.94%	26

How many meetings/events did you fully cancel?



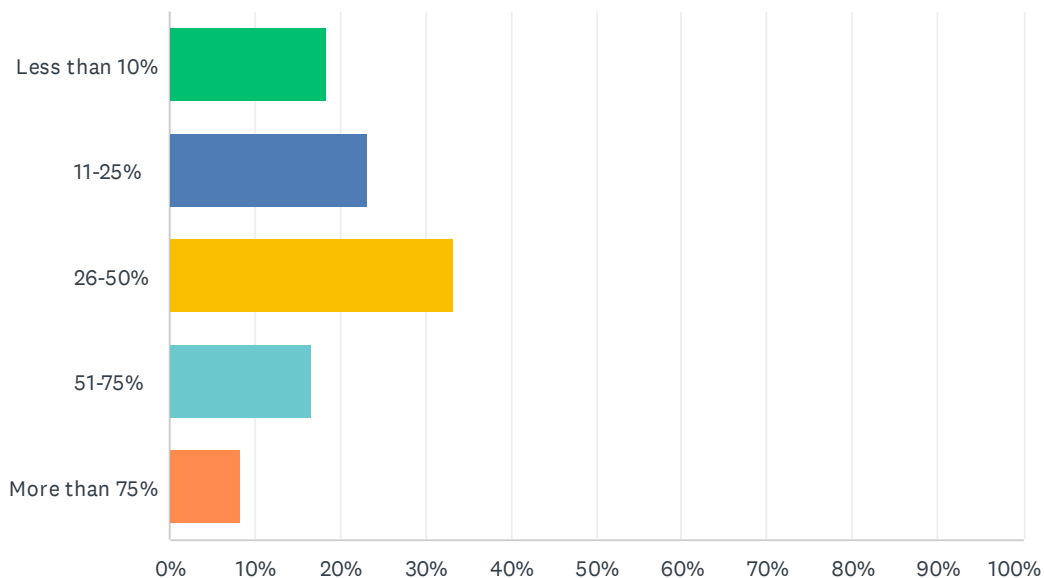
ANSWER CHOICES	RESPONSES
1	24.32% 9
2 - 5	48.65% 18
6 - 10	13.51% 5
More than 10	13.51% 5

How many meetings/events at your organization shifted to virtual or hybrid due to COVID-19?



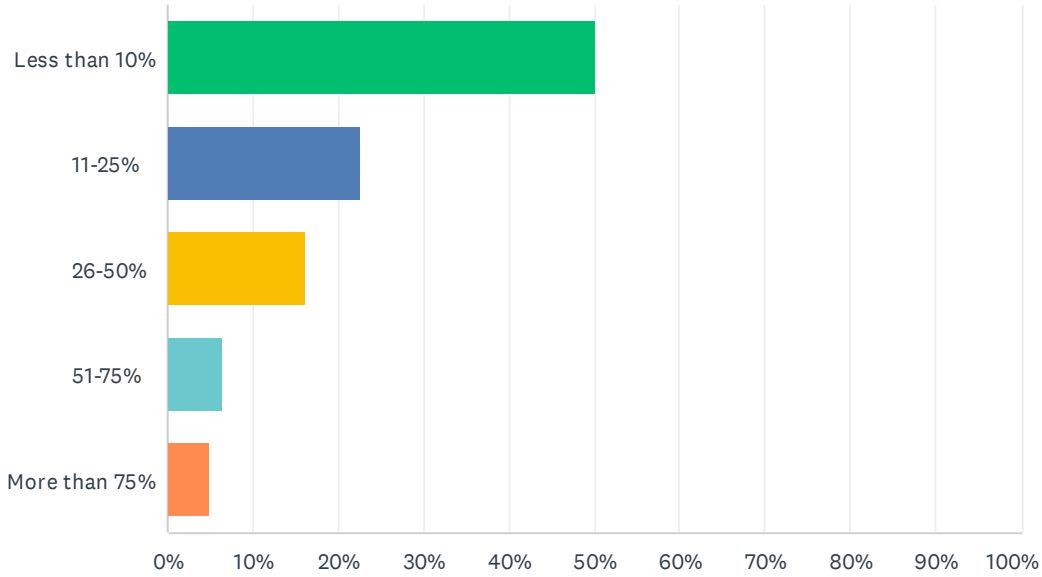
ANSWER CHOICES	RESPONSES
0	4.84% 3
1	3.23% 2
2 - 5	48.39% 30
6 - 10	20.97% 13
More than 10	22.58% 14

Pre-COVID-19, what percentage of your organization's total revenue was derived from in-person events (registration, sponsorships and exhibits)?



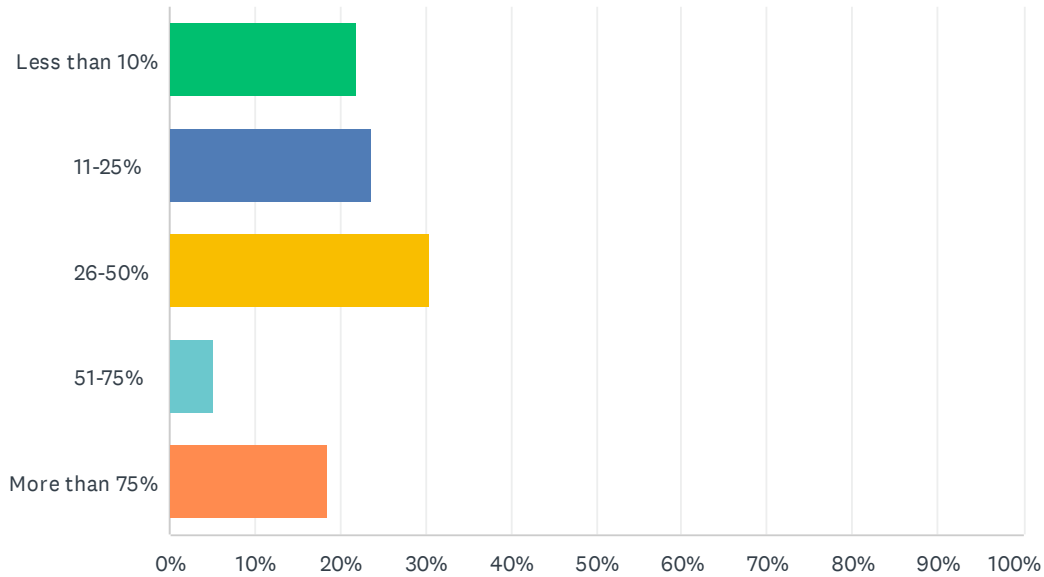
ANSWER CHOICES	RESPONSES	
Less than 10%	18.33%	11
11-25%	23.33%	14
26-50%	33.33%	20
51-75%	16.67%	10
More than 75%	8.33%	5

During the first year of COVID-19, what percentage of your organization's total revenue was derived from in-person, virtual and/or hybrid events (registration, sponsorships and exhibits)?



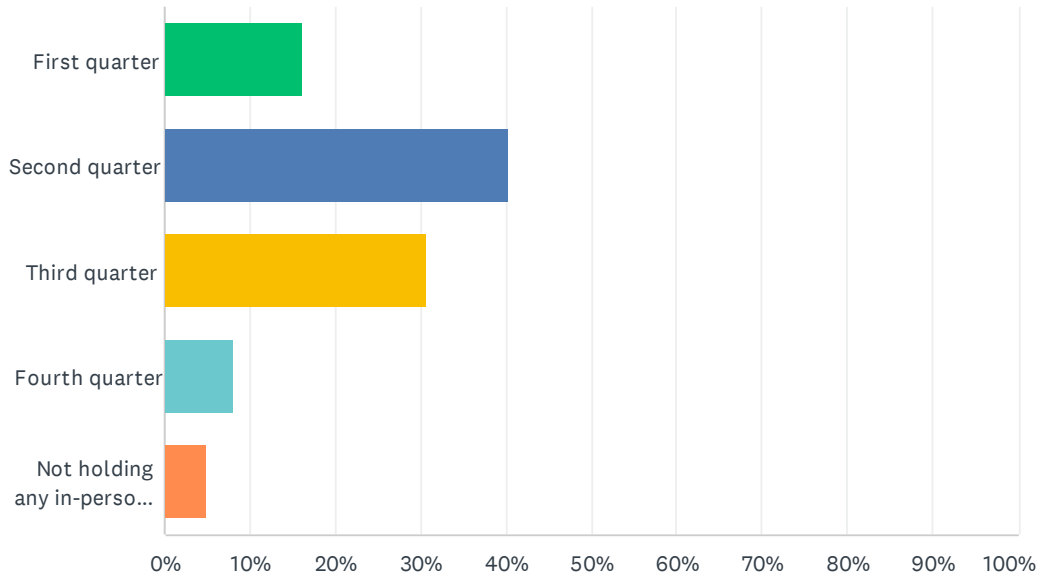
ANSWER CHOICES	RESPONSES
Less than 10%	50.00% 31
11-25%	22.58% 14
26-50%	16.13% 10
51-75%	6.45% 4
More than 75%	4.84% 3

What percentage, if any, decline in event revenue did you see due to COVID-19 (registration, sponsorships and exhibits)?



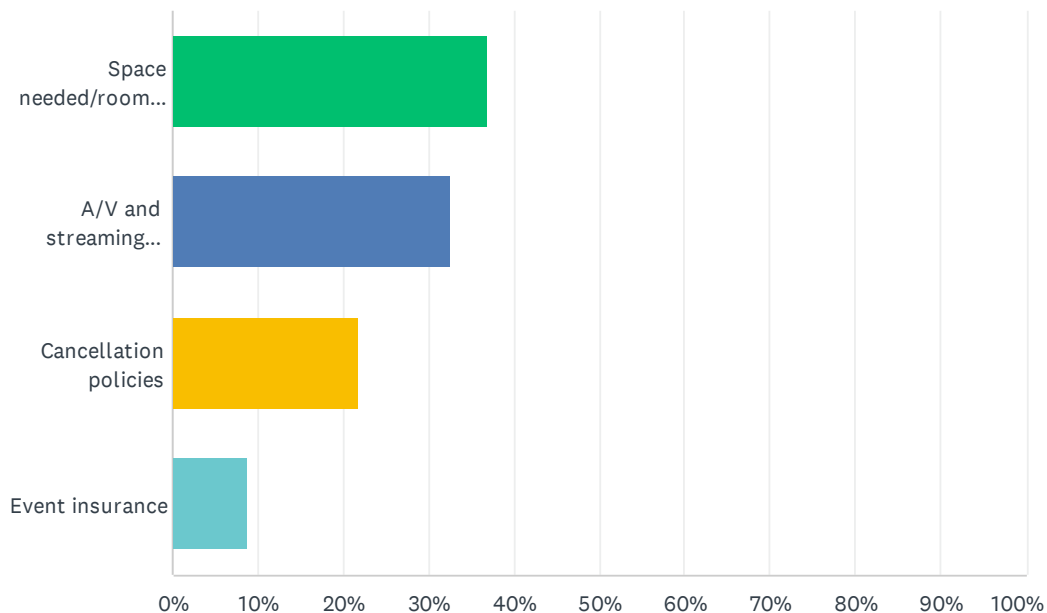
ANSWER CHOICES	RESPONSES	
Less than 10%	22.03%	13
11-25%	23.73%	14
26-50%	30.51%	18
51-75%	5.08%	3
More than 75%	18.64%	11

When did you hold, or do you plan to hold, your first in-person event of 2021?



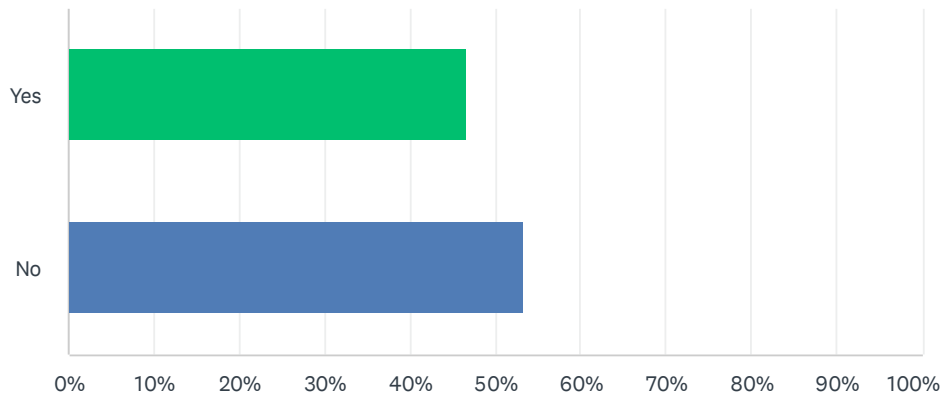
ANSWER CHOICES	RESPONSES	
First quarter	16.13%	10
Second quarter	40.32%	25
Third quarter	30.65%	19
Fourth quarter	8.06%	5
Not holding any in-person events in 2021	4.84%	3

What is the one biggest challenge you currently face in booking future in-person meetings?



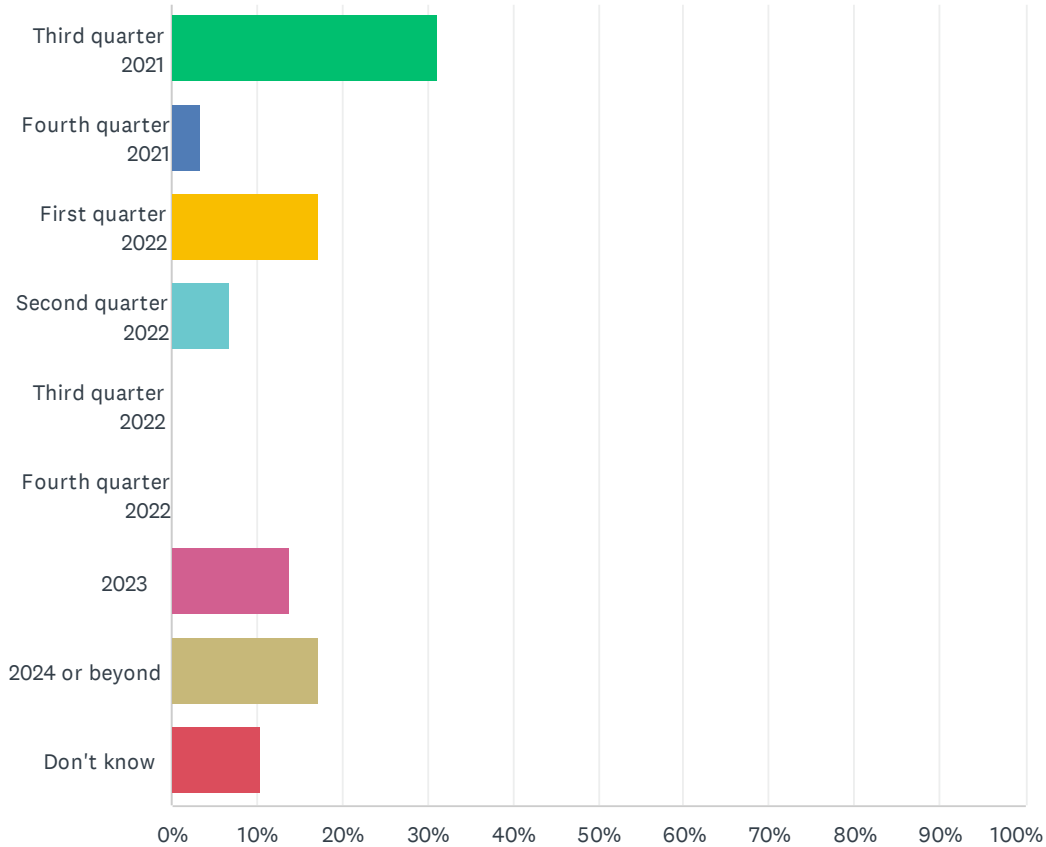
ANSWER CHOICES	RESPONSES	
Space needed/room night ratio	36.96%	17
A/V and streaming requirements and costs	32.61%	15
Cancellation policies	21.74%	10
Event insurance	8.70%	4
TOTAL		46

Is your organization currently sourcing new event RFPs?



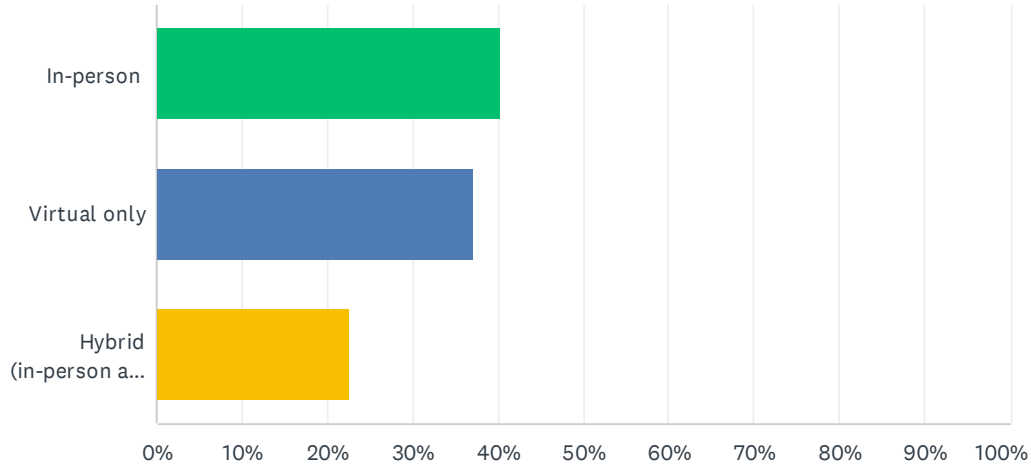
ANSWER CHOICES	RESPONSES	
Yes	46.77%	29
No	53.23%	33

When are you looking to book your organization's next in-person meeting?



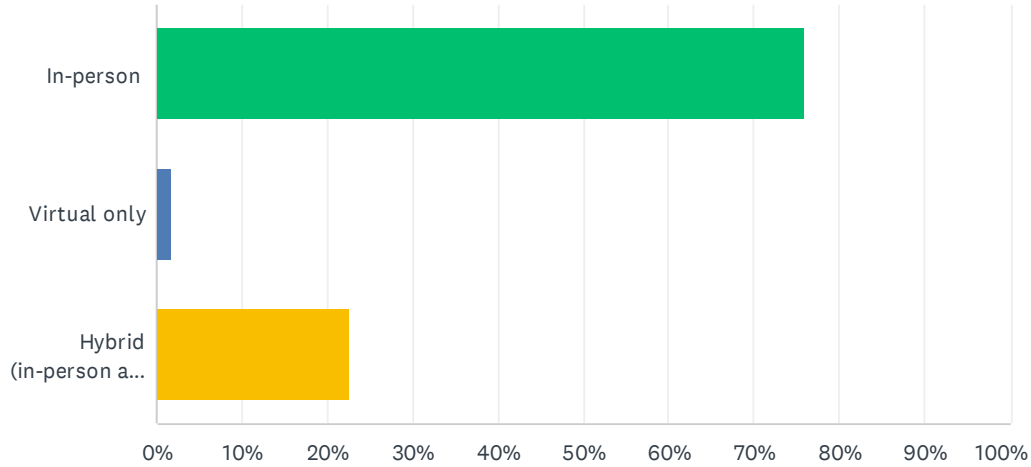
ANSWER CHOICES	RESPONSES
Third quarter 2021	31.03% 9
Fourth quarter 2021	3.45% 1
First quarter 2022	17.24% 5
Second quarter 2022	6.90% 2
Third quarter 2022	0.00% 0
Fourth quarter 2022	0.00% 0
2023	13.79% 4
2024 or beyond	17.24% 5
Don't know	10.34% 3

Our 2021 largest event (annual conference and/or expo) is planned to be/ was held:



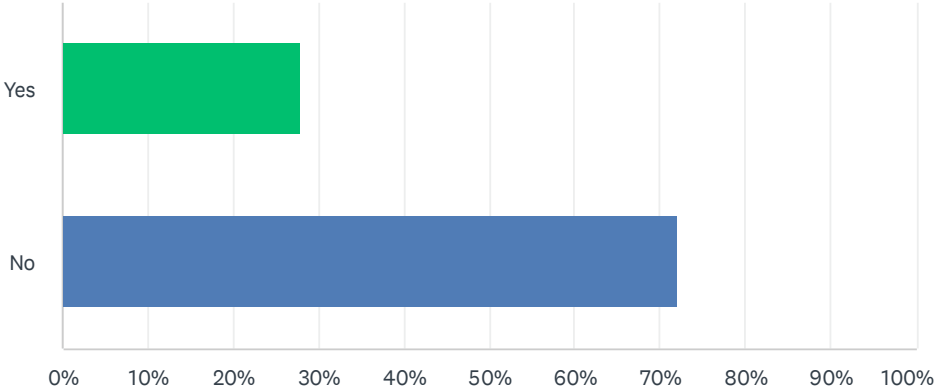
ANSWER CHOICES	RESPONSES	
In-person	40.32%	25
Virtual only	37.10%	23
Hybrid (in-person and virtual taking place concurrently)	22.58%	14

At this time, our 2022 largest event (annual conference and/or expo) is planned to be:



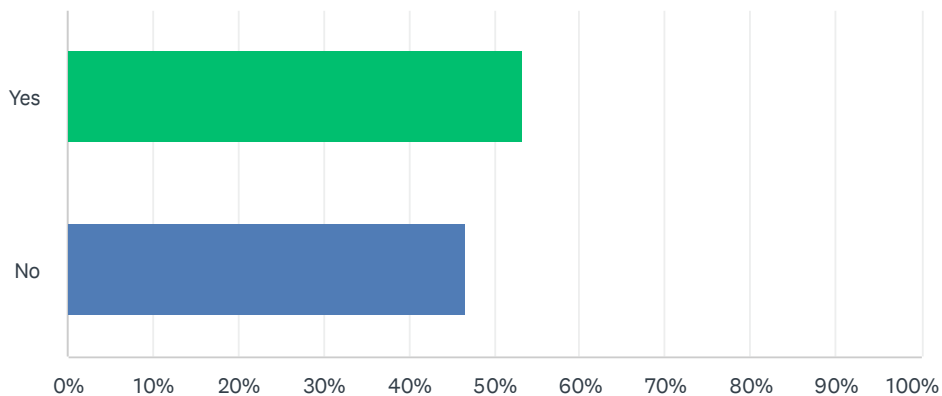
ANSWER CHOICES	RESPONSES	
In-person	75.81%	47
Virtual only	1.61%	1
Hybrid (in-person and virtual taking place concurrently)	22.58%	14

In the future, does your organization plan to transition any of its previously in-person meetings to virtual-only?



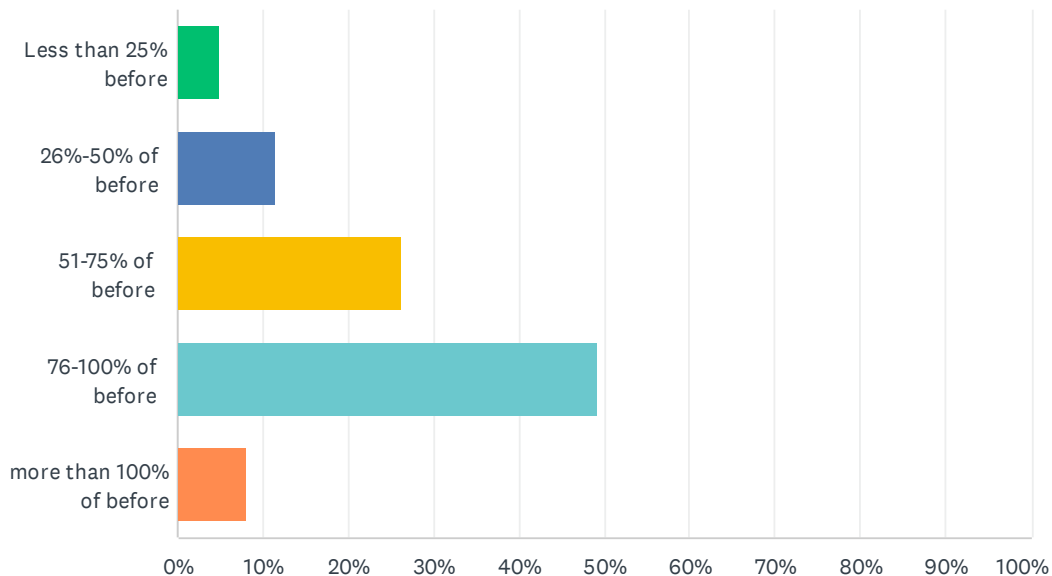
ANSWER CHOICES	RESPONSES	
Yes	27.87%	17
No	72.13%	44

In the future, does your organization plan to regularly host hybrid meetings (in-person and virtual taking place concurrently)



ANSWER CHOICES	RESPONSES	
Yes	53.33%	32
No	46.67%	28

When your organization's largest in-person meeting returns (or if it already has), what are you forecasting (or did you forecast) in-person attendance will be (was) relative to before COVID-19?



ANSWER CHOICES	RESPONSES
Less than 25% before	4.92% 3
26%-50% of before	11.48% 7
51-75% of before	26.23% 16
76-100% of before	49.18% 30
more than 100% of before	8.20% 5