



Market Analysis

An overview of current market trends and their impact on the business events industry

December 2023



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Preface

The objective of this report is to conduct an in-depth market analysis and present insights into how current trends are shaping the business events tourism industry. These insights should provide MeetDenmark, and its partners, with a better understanding of consumer needs, as well as an overview of potential risks and market opportunities.

The business tourism industry is experiencing a significant change in the market, as a consequence of not only the pandemic but also other trends such as climate and environmental challenges, digitalisation, increased political instability, rising inflation and costs. These trends affect the demands and needs of business tourists and have a profound impact on their motivation and decision-making process. For international business tourism destinations, it becomes essential to understand these shifts in the market and what implications they hold for the industry. Only with this understanding, can destinations effectively adjust strategic areas of focus, mitigate risk, and capitalise on new market opportunities.

For this reason, MeetDenmark procured MMGY Intelligence to conduct an in-depth market analysis, that provides an overview of key market trends and how they affect and impact the business tourism industry, both in the short and long term.

There is already a vast amount of existing literature, that focuses on key trends and how these affect business tourism. MeetDenmark wanted to take advantage of this extensive knowledge base and MMGY therefore carried out a meta-analysis of relevant existing literature, and on this basis worked out an overview of the most important trends and the impact they have or will have.

In addition to an overview of the most important trends, and how they affect the overall business tourism industry, MeetDenmark wanted the analysis to go in-depth with three selected markets within the sector; trade fairs, meetings and incentives (M&I), and congresses. The in-depth analysis allows for a more nuanced understanding of the how key trends impact the various markets, within business tourism.

MeetDenmark hopes that this report will provide new insights and assist relevant stakeholders, within the industry, to reimagine the future of the business event industry and how it can generate even more value and impact.

Introduction

The purpose of this market analysis report is:

1. To identify key trends across relevant/existing reports within the business event industry (meta-analysis)
2. To investigate how these key trends impacts the various sectors with the business event industry (deep dive analysis)

Within the industry there are numerous trade associations, each representing different niche of the sector, and these alone produce a vast number of reports highlighting a number of different trends and how they potentially affect in-person event tourism. The nature of the industry is that it is quite disparate, there a few global players and the majority of events are held locally, therefore the industry media follows suit. Their reports too can be quite focused on a geographical market, or sponsors wishes. To ensure the analysis didn't get totally focused on the micro issues of the events industry itself, we also reviewed reports about traveller needs, workplace changes, employer and employee sentiment, and personnel development, so that macro considerations of what actually motivates companies to organise in-person events, and why delegates want to attend, could also be considered.

What this analysis explores are the various conclusions made in this existing research, and condenses those findings, thereby providing an overview of these market trends and how they may affect and impact the in-person events tourism industry, both in the mid and long term.

Throughout the research of existing reports, and opinions therein, an attempt has been made to seek those that are written from a basis of fact and to set aside opinions that are promoted, often unchallenged, from those with a clear bias, normally promoting a product or service in that field. That said the polarisation of opinions during Covid as to the future success of the in-person events sector means that it is difficult not to include some of the hyperbole of that period, especially with regards to the use of technology to replace in-person events, but it is used in conjunction with more recent sentiments to the future of in-person events.

The analysis involved the studying of over 35 existing reports, not only in the MICE sector but also within human resources and corporate organisational structure. To ensure the analysis is relevant, we have for the most part chosen reports that concentrate on the period between 2019 – 2023 – a list of these can be found in Section 3.



Section One

Meta Analysis Research of Trends



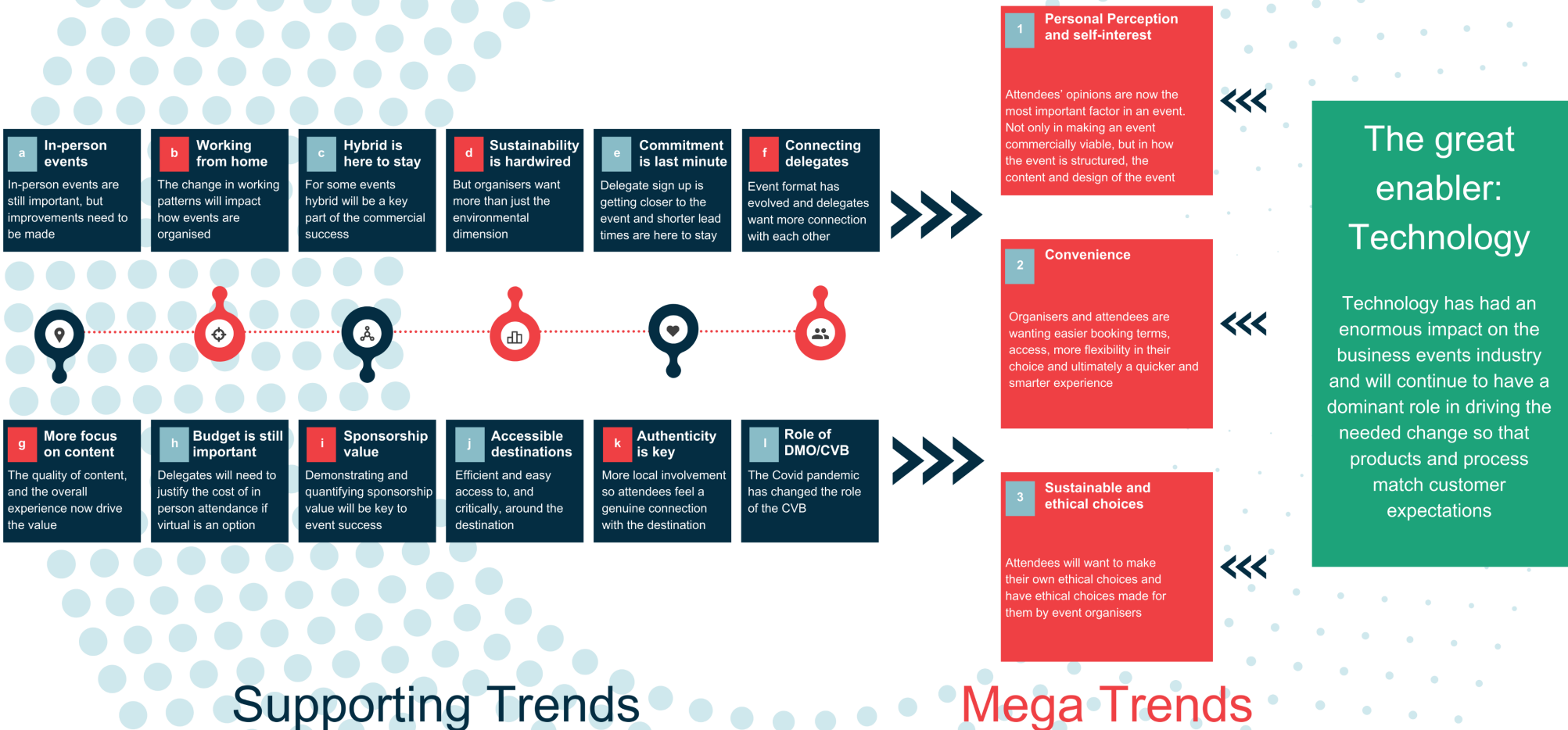
Executive Summary

Section One



Meta-Analysis of Trends

The meta-analysis has identified that there are twelve trends referred to in this report as ‘supporting trends’ impacting the in-person events sector. These twelve trends are then interlinked through three ‘mega trends’ of buyer behaviour and in turn these trends are facilitated by the great enabler – technology.



Historical trends

The twelve trends are broadly consistent across a number of reports examined in the meta-analysis. Several of the trends are not particularly new to the sector and therefore demonstrate a consistent issue that in-person event planners have had to deal with that currently is not showing any sign of going away. The issue of keeping costs tight is the most obvious of these trends and will for in-person event organisers remain a constant issue. Other consistent trends include the need for good accessibility, the continuing of enquiries and confirmations becoming more and more short term, and the need for events to demonstrate sustainability. A cursory glance at many reports in the sector during the 2010's will have identified these as trends back then and they continue now to remain trends.

Sustainability, whilst not a new trend, perhaps has changed direction a little bit. The analysis suggests that many planners have environmental goals as part of their in-person event plans, already mandated within their company values. Increasingly important to event planners are the issues of social, and corporate governance, and particularly diversity, equity, and inclusion (DEI) to make sure all their attendees feel welcome. The meta-analysis would support the argument that many event suppliers are stuck on the environmental sustainability message, rather than viewing sustainability across many dimensions.

SUPPORTING TRENDS

a In person events will continue
There is no other medium that provides the human connection, business relationship development and attention focusing of prospects

Working from home is a new norm
Or is it? Companies are pivoting on this rapidly but it is likely that it will remain common practice for many employees to work part of their working week from their own home

c Hybrid events are here to stay
Companies and especially associations have engaged a larger international footprint and diversified revenue streams by servicing greater numbers. This will remain

Sustainability means more than just environmental
Environmental Sustainability is hardwired into events now. However, there is more to Sustainability than just the environment

Emerging trends

The meta-analysis also identified a number of emerging trends that impact on the in-person events sector. A trend of working from home, which though varying even in the last few months in popularity, is certainly something that is different from analysis in the previous decade. This trend will continue to evolve, partly driven by demographic expectations, employee demands, cost of living and inflation. How these influences impact will be interesting to monitor over the next few years – and different countries and industry sectors will be impacted by this to various degrees.

The term hybrid doesn't appear in many of the industry reports pre-pandemic, however during the pandemic a huge amount was written about virtual being the only future, and now the sector seems to have settled on a hybrid balance being a way forward; but only if the digital experience offers value to the attendee and sponsors.

The topic of experience is also demonstrated through a growing trend for greater authenticity, and no reluctance in demanding it, driven by greater travel knowledge of individuals no longer wanting a basic tourist experience but seeking a sense of place.

The in-person event experience is also illustrated in the growing trend of the importance that the content plays, and how the attendees can shape that content.

SUPPORTING TRENDS

e

Commitment is even more last-minute

Before the pandemic we were already experiencing delegate sign up getting closer to the event date and shorter lead times

f

Delegates require connecting

Meetings structure has evolved and delegates ability to connect will need to be addressed through new ways

f

g

Events will be more focused on content

Potential delegates will need to be convinced of the value of the event which relies on the quality of content

h

Companies will want to keep the purse strings tight

Delegates will need to justify the cost of in person attendance if virtual is an option

h

There is also a positive trend that in-person events are a very important part of corporation's marketing mix of business activity and there is demand across all demographic age groups to attend in-person events. The analysis suggests that there has perhaps never been a desire to connect as much, perhaps caused by a pandemic that truly did impact the entire world. It has often been said that unfortunately it takes tragic world events to create dialogue, but at times of uncertainty, in a world that continues to be divided and where trustworthy news and information is in diminishing supply, live business events will continue to flourish and demonstrate their value. All the research suggests that in-person events are still important and perhaps now more than ever.

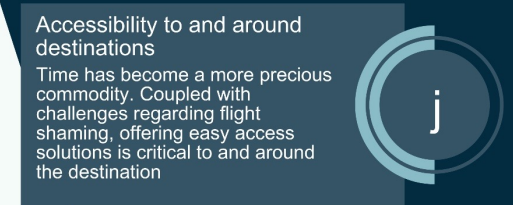
There also seems to be a growing trend of a willingness to be part of a target audience and an understanding that the sponsors need return for their investment. The trend here is also demonstrated by attendees wanting greater connection at in-person events, though wish to be able to control that to some degree, utilising a trend for better technology at events.

The final trend, that the analysis indicated, is confusion of the role of a convention bureau or destination marketing organisation. Many convention bureaus during the pandemic pivoted from a role of destination marketing to becoming destination managers, even changing priority from promoting the destination to international visitors to promoting the destination to domestic meeting organisers. Whilst this was understandable for a short period, there is now among some stakeholders and other suppliers, confusion as to the role of and the value of the activities of a number of convention bureaus.

SUPPORTING TRENDS



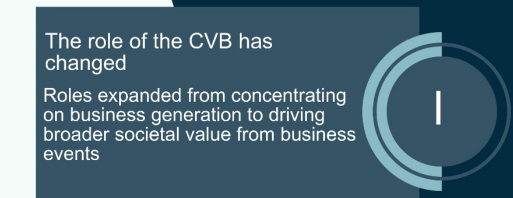
i Sponsorship value needs to be specific
Demonstrating and quantifying sponsorship value will continue to be a challenge faced by event organisers



j Accessibility to and around destinations
Time has become a more precious commodity. Coupled with challenges regarding flight shaming, offering easy access solutions is critical to and around the destination



k Authenticity is key
Authentic real experiences mean a local involvement so attendees feel some connection with the destination



l The role of the CVB has changed
Roles expanded from concentrating on business generation to driving broader societal value from business events

All of the trends are...

In person events
are more valued



Working from
home is a new
norm



Hybrid is here to
stay



Sustainability is
more than the
environment



Commitment is
even more last
minute



Delegates
require
connecting



One is not more important than another

This report does not rank the trends in terms of importance, as to do so is subjective. Different in-person event organisers will have different motivations for organising their event, different influences and goals. Cost is an obvious example of this – different organisers have different budgets and an item that might be viewed as expensive to one buyer may be viewed differently by another. There is not one trend that is more important than another, and it is the readers prerogative to consider each of the trends and how they will impact on their ability to attract in-person events to their destination or venue, and therefore decide which of the trends they consider are of more relevance to them.

The trends should also not be viewed in isolation, they are interlinked in many ways, so whilst one trend is of more importance to one buyer than another, they can be intertwined and dynamic in nature. External factors can rapidly change, making the relevance of one trend more important, therefore understanding this balance and how the trends impact each other is key.

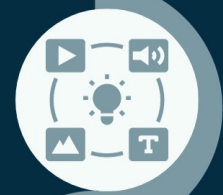
Now more than ever, people are looking for a balance between technology and human interactions in their buying decisions and the same is true in the attending of and purchasing of in-person events. At the same time, people are expressing an increased desire for convenience in their consumer behaviour.

They are more comfortable receiving recommendations on new products or services from new digital media influences. All these dynamics create an interesting quandary for suppliers, be they destinations or stakeholders, who must continue to learn to market to buyers with these new desires.

Considering this shift, destinations must find evolving ways to connect with delegates and event organisers. While technology is still an important element, people are starting to shift toward wanting a balance between convenience and human interactions.

Within the supporting trends there are several common characteristics, that intertwine working together in how they influence event planning decisions, and this report presents those as three mega trends and a great enabler. A supporting trend may be initially viewed as being in connection with just one mega trend, but similarities exist for all of the supporting trends within the mega trends, and they are interconnected. Essentially these mega trends are the ones that form the decision making for delegates to attend in person and for organisers to create in-person events. We believe understanding the balance of the supporting trends and mega trends is key for destinations and stakeholders to have a greater chance of securing in-person events.

Events will be more focused on content



Companies will want to keep the purse strings tight



Sponsorship value needs to be specific



Accessibility to and around destinations



Authenticity is key



Role of a convention bureau



.....interlinked



The Twelve Supporting Trends



In Person Events will continue. There is no other medium that provides the human connection, business relationship development and attention focusing of prospects.

Within the meta-analysis there was a significant shift in the emphasis for the support of in-person events. Commentary from 2020, as we were amid lockdowns, many with a technology platform bias, were stating confidently that in-person events would unlikely happen again. Reading reports from late 2022 and early 2023, presents a different picture, one where the value of in-person events has been reset but with an acknowledgement that there are improvements to be made, as changes in working behaviour can present themselves as an opportunity to the smart thinking event organiser.

These changes in working behaviour are centred around more companies offering more flexibility, including working from home, digital nomads and remote working. There is also the growing 'gig' economy relying heavily on temporary and part-time positions filled by independent contractors and freelancers rather than full-time permanent employees. It will be vital for companies to get this slightly disparate workforce together, to create more in-person touch points with them, and corporate in-person events offer the perfect opportunity to deliver corporate messaging and a sense of belonging.

The drive for in-person events is perhaps best summed up by the American Express 2023 Global Meetings and Events Forecast statement of "In-person meetings and events are roaring back – and at the same time, we can take lessons learned during the last few years to make positive, long-lasting changes to the way we work".

The Deloitte Insight New Normal report on business travel industry also stated that "Live-event attendance appears to be poised to be a big growth driver, leapfrogging from the fifth biggest trigger for increased spend in 2022 to the top spot in 2023. More than half of travel managers in Europe expect industry events to spur travel growth this year". This may mean a shift, and a recognition in many cities that visitors previously categorised as business travellers are in fact attending in-person events; and those destinations that can quickly prove to their stakeholders, both public and private, that in-person events have far greater impact than once thought will be poised to benefit.

TREND A

Significance of in-person events

The value of in-person events has been established but with an acknowledgement that there are improvements that can continue to be made, and events are unlikely to return to the same formats



more flexibility

Companies offer employees more flexibility and workforces are more nomadic



recognition

It will be vital for companies to get this slightly disparate workforce together, to create more in-person touch points with them



belonging

Events offer employees a sense of belonging



improve

Take lessons learned during the last few years to make positive, long-lasting changes to the way events take place



measurement

Continued evaluation of event and attendees ROI

WFH is the new norm. Or is it? Companies are pivoting on this rapidly. It will be more common for people to work at least 1 or 2 days a week from home. Employees are demanding this flexibility and balanced work environment, and this may impact in-person events attendance, both positively and negatively.

Like the premature prediction for the end of the in-person events industry, the working from home (WFH) statements of 2020 make for very different reading in 2023. Perhaps the most public of these has been the change from technology companies such as Meta, even Zoom, who after embracing remote working have decided to ask workers back into office locations for at least three days a week. Meta is not alone with many other leading companies making significant changes to previous policies.

Remote work though is not likely to do a complete U-turn and will find a balance between allowing different levels of employees an opportunity to work remotely and in the office. The evidence also suggests this is not just work from home – remote will allow employees to base themselves at a different office or location for periods of time.

There is a potential threat from the impact of the working from home trend. Potential delegates can easily get into routines that suit them on a personal level, they are saving time and money in not commuting, and therefore may be reluctant to attend events on days of the week that they have started to assume are their allotted days to work from home. There is also the option that they can decide not to attend in person and assume they can just attend remotely. However, there is a flipside to this that offers huge opportunity. As companies recognise the importance of getting their employees together, the recognition of the value of in-person events can improve. The pandemic raised the importance of well-being for employees and companies will see in-person events as a way to create team connection, knowledge and better productivity.

The 2022 Skift Trends – Designing for Connection report succinctly states this: “With teams working remotely across multiple time zones, it has never been more important to hold events that connect colleagues, incentivise employees and new hires, and build company culture. Extending beyond pure team-building events and incentive travel, it potentially makes every business event a crucial live touchpoint of interaction.”

TREND B

Significance of WFH

There will be a greater need for employers to offer their personnel increased flexibility and a better work/life balance. This may have both a positive and negative impact on attending in-person events



more disparity

Increased flexibility also means employees are not connecting in person as often



opportunity

Potentially more events as companies get this slightly disparate workforce together, to create more in-person touch points with them



threat

Employees will need greater persuasion to go to events outside their normal wfh routine



improve

Events will be more than just team building events but have agendas to promote the company's values and mission.



touchpoint

Events no longer just seen as a marketing activity but also a human resources one

Hybrid is here to stay, but to what extent. Companies and especially associations have engaged a larger international footprint and diversified revenue streams by servicing greater numbers. This will stay. On-demand content from events will also be more important to new revenue models.

Whilst it may appear that hybrid solutions were created because of the pandemic, many organisers had already been using or exploring the revenue generation from hybrid solutions, however the pandemic accelerated the use and availability. What potentially was initially promoted as an ability to save significant costs, has perhaps not been borne out in more recent evidence. Attendees of hybrid events demand high value and quality, without this they remain disengaged, and delivering this is costly.

There is little doubt that some meetings, essentially internal and small, will continue to use technology and this will have some impact on premium business travel. However, these meetings would often take place in internal meeting rooms at company offices so this change will have little impact on destination venues – in fact we are seeing evidence that companies are and will downsize their office space and internal meeting space will be seen as a cost – so this may have a positive impact on venues needing to service smaller internal meetings. There is a danger that airline capacity may change due to the potential drop in the usage of different aircraft cabins. With potentially less business class fares, and last-minute high yielding fares from business travel, airlines may change configurations of their aircraft, meaning more capacity in economy but also increased costs due to the lack of premium fares; or they may put smaller aircraft on routes, reducing capacity and a resulting likelihood of a higher fare.

In the content rich association and B2B conference sectors, the evidence suggests hybrid is very much an opportunity for revenue generation, and the ability to create year-round touch points with the membership or industry community. This may impact some in-person events and the number of delegates attending in-person, however the evidence suggests this isn't about replacement but addition. Organisers are keen to keep the numbers in the room as both attendees and sponsors get better value from that, and the education satisfaction is higher.

TREND C

Significance of hybrid

Hybrid may impact on the number of in-person attendees. Destinations will lose out on economic spend in hotels and other suppliers



more revenue

Hybrid offers the opportunity to engage attendees virtually, increasing audience and therefore revenue



not the same impact

Attendees of hybrid events demand high value and quality, without this they remain disengaged, and delivering this is not without cost



air travel impact

less premium fare flights will mean changes to air routes, frequency, pricing and availability



more touchpoints

Hybrid offers organisers the opportunity to create a year round community with attendees



profit source

ROI is better from those attending in-person but organisers need to keep the value distinct for both audiences

Environmental Sustainability is hardwired into events now. However, there is more to sustainability than just the environment. Is the events industry not looking at the wider social dimension of the UN Sustainability Goals?

Sustainable actions are growing as a significant part of human behaviour and consumers will continue to put pressure on companies, and in a similar way employees will exert pressure on their employer. Increasingly new hires want a better understanding of a company's ethics, not just benefits on offer. This pressure has and will continue to manifest itself at in-person events and suppliers will be forced to offer flexibility and suggest increasingly ecologically sound options to potential customers. Environmental sustainability is no longer a buzzword, but a mandate. But solutions will need to be provable. Companies need to report to their shareholders and other interested parties and will need to do so with confidence. Again, it is perhaps best summed up by the American Express 2023 Global Meetings and Events Forecast statement; "from choosing destinations that promote (environmental) sustainability, to selecting sustainably certified venues, organizations are implementing robust strategies and processes to minimize their event emissions and report on their progress to internal and external stakeholders."

The events sector has adopted the environmental sustainability dimension but perhaps has not fully explored other areas of human sustainability and how companies can create a diverse, inclusive, and equitable workplace. Building an inclusive environment is an investment in the business' growth, employee retention and culture. Therefore, many corporate companies and associations already have these goals, they have missions and objectives that reflect the UN Sustainability Goals and have diversity and inclusive practices.

It appears there is a significant gap in how the in-person events industry suppliers position sustainability. There is an emphasis on just climate, carbon emissions and the environment, and very little mention of the human dimension.

TREND D

Significance of sustainability

Events reflect the brand of a business or collective gathering and whilst sustainability in events has been a major issue for over a decade it will continue to widen in meaning and importance

more proof



Organisers are going to want to see more documentation and measurement from venues as they strive to make their events closer to carbon zero

destination choice



Events will want to associate with locations that reflect their values

more than just environmental



Event suppliers seem to have relegated social sustainability in the events industry but event organisers value it just as highly

diverse & inclusive



Social sustainability encourages event organisers to be diverse and inclusive through speakers and audience participation

measurement



Accurate and thorough measurement will be needed to ensure no accusation of green or social washing

Companies have now typically developed impact plans which include their environmental sustainability goals, but also include a number other human sustainability commitments. These typically include:

- ✦ Acting ethically and upholding professional, ethical and quality standards at all time
- ✦ Protect the health and wellbeing of employees and empower them to work in new and more flexible ways, enabling them to thrive
- ✦ Deliver against inclusion, diversity and equity commitments, helping to create an environment where diversity of experience, background and perspective are truly valued, and employees feel empowered to come as they are
- ✦ Develop a continuous learning culture that supports people to grow in their own way and provides opportunities to learn for a lifetime. A place where everyone can make their mark
- ✦ Support employees to do work that matters, helping to build a stronger, fairer society
- ✦ To be Net Zero by 2030

Ethical choices will be a key driver along with sustainability. As with all these trends, some in-person event planners will have a different focus of importance on one ethical reason over another. It is a multi-faceted area and suppliers will need to work closely with event planners to identify what matters most to the latter.

Commitment is even more last-minute. Before the pandemic we were already experiencing delegate sign up getting closer to the event date and shorter lead times. Now, more than ever, with remote working habits commonplace, in-person event buyers need to hold their nerve when it comes to watching delegate numbers. Suppliers need to factor in more risk as room blocks won't be confirmed 90 days out.

Whilst the advent of technology has made organising large scale in-person events a lot easier, with registration, ticketing, accommodation blocks now all handled electronically, it has meant that in-person events can be planned at much shorter notice. In-person event attendees will sign up at shorter notice, and organisers and their supply chain will have to manage the risk that this creates.

The technology has been around for some time, and it is a change in human behaviour that is really driving the change. We are no longer willing to commit ourselves to longer term purchases and patterns of buying behaviour that were once typical have changed, perhaps more so in the travel sector than any other. What used to be the domain of intermediaries has been shook up with far more transparency to the end purchaser than ever before. Numerous price comparison websites, online travel agencies, and booking platforms make it simply more convenient than ever to book when and how you want. People take holidays differently now than they used to, shorter breaks are more frequent at short notice and this behaviour is manifesting itself in the in-person events industry as well.

We also live in a more informed society and whilst in-person events will help delegates make sense out of the overload of communication that exists, it also means we crave content that is far more current. Whilst this will help drive numbers of attendees, and the growth of in-person events, the flipside is that it will only encourage last minute sign ups.

Risk also plays a part in destination choice, not only in terms of human safety but also in political instability. Organisations will be more mindful of the stability, economically and reputationally, than in previous years and this too will lead to more last-minute bookings as organisers will want to ensure they have not made an erroneous choice.

TREND E

Significance of commitment

Events need a mass of delegates to function. Without some certainty to profitability event organisers won't organise the event



technology drives last-minute

Technology has made organising large scale in-person events a lot easier. With registration, ticketing, accommodation blocks now all handled electronically, it has meant that in-person events can be planned at much shorter notice



business travel no longer distinct

It is difficult to determine which bookings belong to delegates, business travellers and leisure travellers



content will need to be fresh

The last minute nature of sign up will only compound the need for organisers to also have content planned at the last minute to satisfy a demanding audience



risk

Organisations will be mindful of the stability, economically and reputationally and this too will lead to more last-minute bookings as organisers will want to ensure they have not made an erroneous choice

Delegates require connecting. The rapid change in the last few years means delegates expect more. For all in-person events, from small internal meetings, to large congresses, meetings structure has evolved and delegates ability to connect will need to be addressed.

The evidence suggests that delegates now look at a number of additional new factors to attend in-person events, therefore there is a need to develop greater value to the actual connection delegates will benefit from.

As in-person events have returned to live, much of the perceived value of in-person events has been driven from comments regarding the so-called serendipity of events, the unarranged chance meetings between attending delegates, that only in-person events can drive. Added to the structured meetings content it further drives the value of in-person over virtual. It would seem though that delegates, no doubt wary of cost and a need to demonstrate a return, want to leave less to chance and require organisers to create more facilitation for connecting to happen.

This goes beyond the simple networking drinks at the end of the day. Delegates now want better connection to other attendees. There is an argument that this can be done virtually but in-person events can also provide a more inclusive and welcoming environment.

When delegates are face-to-face with prospects or a company salesperson, they can assess body language and get a good feel for them based on non-verbal gestures and tone of voice. This is harder over video call, especially if someone is presenting using a pre-prepared speech. In-person events also make it easier to meet with people and get a feel for who they are, and it is easier to gauge engagement at in-person events and measure people's interest levels from how they respond. Salespeople have a skill of assessing potential from face-to-face meetings in this way. After all most business events are a sales opportunity. And for delegates attending an in-person event as a potential buyer, meeting salespeople can give a good idea of what it might be like to deal with that company.

TREND F

Significance of connecting

One of the main benefits of attending business events is making contacts with peers and customers. Events will need to drive this as demand increases for connecting



greater value

Attendees are having to justify their attendance at events particularly as costs increase and organisers will have to find ways to connect delegates



creating chance

Organisers need to create chance opportunities for delegates to connect. Event structures will change to allow for this serendipity



connections need to be genuine

Delegates don't just want a database, but want genuine business opportunities through their new connections



networking

Event structures will change to better allow more opportunities for delegates to make connections through improved networking

It's also hard to maintain people's focus when you are running virtual events. There is the possibility of numerous distractions, all of which can be acted on. The attendee might be tempted to answer a call, browse other websites, or speak to others. At an in-person event, these distractions are largely not there, and the behaviour expectations dictate that attendees do not want to appear rude by leaving the room or taking a call – as long as the content is engaging.

Real life events let you meet a wide range of people and promote networking and socialising. The same level and depth of contact is almost impossible to achieve in digital settings. In-person events give you the chance to make connections as well as meet up with old contacts. There are more opportunities to speak to industry peers, socialise with others and even to make business deals or pursue openings for a new job. Ultimately, attendees like the human interaction and connection that in-person meetings can bring. This creates opportunities for destinations to help create those additional and more imaginative solutions for organisers to help drive delegate connectivity.

Delegates are also craving these connections to be authentic, both in business quality but also where the connection was made. Destinations that can better position themselves so that delegates have an authentic experience, coupled with organisers using creative solutions, will help delegates get that connectivity.

Events will be more focused on content. To drive in-person attendance, potential delegates will need to be convinced of the value of the event which relies on the quality of content, the overall experience, customer engagement and the technological experiences.

In a very similar way to being able to connect at events, delegates will choose to attend in-person events based more on the content than ever before. This will put increased pressure on organisers particularly in sectors where events are annual, dates are predetermined, but delegates will have an expectation of current content, whilst at the same time wanting to know the content prior so they can justify the expenditure to attend in-person. This will be a juggling act for many organisers to ensure they can attract delegates with fresh and topical content.

This offers a growing opportunity for destinations able to help organisers with content curation from their local industries and institutions. This content can then create greater relevancy for the destination in the conference and help build relationships between attendees and local business.

Attendees will also want the ability to shape the content more, and there is an expectation for events apps and other technology, to allow agendas to be more fluid, for delegates to get more interaction with speakers and likewise for sponsors to get more interaction with delegates. There is also a growing trend to have a bit more fun – a return to childhood even with more gamification and opportunities to laugh.

Content as well will mean outside the four walls of a convention centre. Attendees will want, like leisure travellers, to feel a deeper connection to the destination than simply sitting in a plenary session or a breakout room. Again, this creates a huge opportunity for destinations from promoting unique and authentic CSR activities, to adding local experts to the educational agenda; some destinations will stand out for the way they help weave the attendee experience into the fabric of the community for which they work.

TREND G

Significance of content

With greater emphasis placed on the value of time and financial investment, the critical tool to justify attendance for delegates is no longer just networking. It is now what the content will be and how this content will engage them and connect them with other delegates



set dates but fresh content

Organisers of annual events will be challenged to ensure content is fresh and relevant even if dates are predetermined



shape content

Attendees will also want the ability to shape the content more, and there is an expectation for event apps and other technology, to allow agendas to be more fluid, for delegates to get more interaction with speakers and likewise for sponsors to get more interaction with delegates



content outside the event

Delegates want to feel a deeper connection to the destination than simply sitting in a plenary session or a breakout room



authentic experience

Destinations and venues can stand out from their competitors by the way they combine the attendee experience to feel part of the community in which the event is taking place

Companies will want to keep the purse strings tight. After seeing that some business events can be conducted virtually, delegates will need to justify the cost of in person attendance if virtual is an option.

Potentially high inflation and lack of business confidence are greater factors in companies having a sense of caution and looking to lower budgets, and it rarely reflects well if companies are seen to be spending excessively on corporate events. That said, there has been a paradigm shift in how corporations need to view events and rather than cancelling in-person events in their entirety, it is more likely that sensible budgeting will take place.

Some of these cost cutting measures will impact destinations, particularly if the length of the event is curtailed by one or more nights. Certainly, the evidence suggests this is a likely scenario. This may well benefit destinations with greater ease of accessibility and early morning arrivals.

Other areas identified for cost cutting are off-site optional activities, and off-site evening events. Those areas may represent savings for the organisation, but they also represent a key value proposition for in-person attendees. Without the opportunity to explore a city's unique attractions and gain a sense of place, organisers may find their event less attractive for delegates to choose to attend.

The rise in costs for suppliers has to be passed on to customers and whilst there will be a point at which budgets and prices won't be able to be happy companions, those destinations which continue to drive value will be the winners. Of course, value is a subjective term, what offers value to one client may differ to another, however by ensuring all the elements of the trends are addressed, suppliers will be in a better position to offer increased value to all clients.

TREND H

Significance of budget

Cost still plays an important part and will remain to do so. Both organisers and attendees are striving for value



careful with costs

With high inflation and other costs increasing organisers will be mindful of cost for their own events and what fees delegates will be comfortable with



shorter duration

As delegates and other attendees strive to create an improved work life balance, organisers will aim to create concise and efficient agendas. This may mean events are shorter in total days



less frills

Organisers say that off-site evening events and activities will be the first thing to go if budgets reduce, however these are highly valued by delegates



value is subjective

Organisers will have different opinions of what value is - as what is expensive to one organiser will not be to another - but suppliers will have to be careful passing on cost increases

Sponsorship value needs to be specific. Increased technology options and hybrid models can provide wider exposure and value for event sponsors. However, demonstrating and quantifying sponsorship value will continue to be a challenge faced by event organisers.

Many in-person events simply wouldn't be able to take place without sponsorship. Without income from sponsors, event organisers wouldn't be able to take calculated risks to organise future events, and other sources of income would be stretched making many in-person events unsustainable.

This means that the needs of sponsors will need to be acknowledged not just by organisers, but also by attendees. Pre-2020 there was potentially a frustration with sponsors and delegates felt they were being 'sold at' or that the organiser was just making more profit. The realisation that sponsors are there for commercial reasons and are in no small way mitigating the costs for the attending delegate, means their needs will be better respected. There will be a real levelling up between the needs of attendees, sponsors, exhibitors, and other stakeholders.

Sponsors will be seeking more than a branded pillar or welcome sign. Due to the advent of technology, event registrations are a potential goldmine for sponsors and organisers alike. People now are far quicker to accept terms and conditions (perhaps thinking GDPR protects them) and give far more personal data than ever before so we expect this area to become increasingly important for organisers and their sponsors. This big data could also become important for destinations – they will potentially be getting huge insight into the traits of attending delegates, what social media they engage with, what hobbies they have, and what will influence them to return to that destination again.

TREND I

Significance of sponsorship

Many in-person events simply wouldn't be able to take place without sponsorship. Without income from sponsors, event organisers wouldn't be able to take calculated risks to organise future events, and other sources of income would be stretched making many in-person events unsustainable



valued by sponsors

Event sponsorship needs to offer more than just awareness but create provable and tangible benefits for the sponsor



valued by attendees

Attendees will need to recognise that sponsors are mitigating the costs of the event for them. They will need to give more value to the sponsors, be it through data or connection



more data

It is probable that the data attendees provide organisers will be more specific and accurate. This could be data overload but used correctly could offer huge value to many parties



destination opportunity

There is potential that the data that attendees share with organisers and sponsors could provide destinations with the ability to create bespoke itineraries and product offers

Accessibility to and around destinations. Time has become a more precious commodity. Coupled with challenges regarding flight shaming, offering ease of access and multiple solutions is critical. This is not just an access to the destination but also around and in an inclusive destination.

Along with the hyperbole regarding the future or not of in-person events, there was much commented on regarding the future of airlines. From statements in the midst of the pandemic that certain routes would never operate again, that airports would become mothballed and airline economics would have to fundamentally change, we now see airports reporting record figures, busier in May 2023 than May 2019, a robust strength quickly returning to the sector, and a very different rhetoric on airlines happening.

This means accessibility will continue to be a key trend. Getting to the destination easily, quickly and without drama from strikes, will be factors that many event organisers will consider as they plan their in-person events. Those destinations with good direct route connectivity will potentially win a larger share of international events, than those where additional connections are required, due mainly to time constraints and the risk of missing connecting flights. If in-person events do potentially get shorter in duration, then additional travel time may be viewed negatively, however travellers have remained curious and want to find and explore new destinations. And there is no reason to think delegates will want to behave differently.

As attendees have become far busier in their jobs, their time at the event is precious. Delegates no longer totally disengage from the office, but are on email, direct messenger chats, and other platforms, and are always available. Therefore, downtime must be kept to a minimum. Accessibility around a destination is therefore critical, dead travel time getting between hotels and convention centres will not be viewed positively. It is the same for activity options – organisers will want these on hand and quickly available.

TREND J

Significance of accessibility

Getting to the destination easily, quickly and without the additional risk of delays, will be factors that many event organisers will consider as they plan their in-person events



time is critical

With a change in work and life balance becoming more commonplace delegates want to spend less time away from home



challenging connections

Whilst many attendees are happy to connect rather than just use main hub airport destinations, they want to do so with a minimum of delay and challenges



feeling welcome

Attendees will make ethical choices about destinations they will visit. Delegates of different religions, sexual orientation and race will want to feel welcomed in the destination



access to all

Delegates should be treated equally and organisers will choose venues that ensure all guests of all physical ability can enter and traverse with ease

Authenticity is key. Attendees want real experiences; however, this shouldn't be confused with centuries old culture. Authentic real experiences mean a local involvement so attendees feel some connection with the destination however this can be modern. Just as long as it is authentic.

Authenticity has become a key driver in people's travel choices. Naturally it has therefore become an important part of delegate wishes. With the increase in technology, websites such as TripAdvisor, Viator have replaced the domain of the tourist office and not only give user generated content through reviews, but also the ability to book. It is possibly the user content that is the most valuable to those attending in-person events as it opens up a destination and the experiences therein. And it does so with increased authenticity. The business events industry often appears to want to distance itself from the tourism industry, but it is more intertwined than perhaps respected. What makes a destination attractive to a delegate is often the same experience that makes it attractive to a leisure visitor. A good example is Madrid – their welcoming statement for their Convention Bureau is "Madrid offers a comfortable and safe setting, where you can indulge in leisure or do business it's just as enjoyable." Essentially it doesn't matter if you are there for leisure or business, the destination attributes will support your experience.

The definition of an authentic experience is very subjective. Just because something might be steeped in years of history does not automatically make it authentic. Just because something might be modern and new also does not mean it is unable to be authentic. And some people have a greater need to immerse themselves in the local destination than others – each delegate's definition of authentic is different. Authenticity is the personal evaluation of the destination and the extent to which those values remain during their visit. Destinations should promote a real image of themselves to delegates so that the true personality and character are experienced by attending delegates and they are not disappointed. Destinations can project a promise through imagery and messaging but if they can't deliver on that promise they are then seen as fake or inauthentic.

The challenge destinations have is event organisers want flexibility, sometimes they will want the structured 5* hotel gala dinner, the next time they want to eat in the local tavernas and to mix with the locals.

TREND K

Significance of authenticity

Authenticity has become a key driver in people's travel choices. Naturally it has therefore become an important part of delegate wishes



everybody is a critic

It is possibly the user content that is the most valuable to those attending in-person events as it opens up a destination and the experiences therein



embrace tourism assets

The business events industry often appears to want to distance itself from the tourism industry, but it is more intertwined than perhaps respected. What makes a destination attractive to a delegate is often the same experience that makes it attractive to a leisure visitor. The most authentic asset is the local people



authenticity doesn't mean old

Just because something might be steeped in years of history does not automatically make it authentic. Just because something might be modern and new also does not mean it is unable to be authentic



personal judge

Authenticity is the personal evaluation of the destination and the extent to which those values remain during their visit

Buyer behaviour and the role of a DMO/CVB. The role of a DMO/CVB shifted during the Covid pandemic. Roles expanded from concentrating on business generation to driving broader societal value from business events.

In the meta-analysis there were several reports that were written on behalf of or sponsored by destination marketing organisations (DMO) and/or the convention bureau (CVB). Over the period of the pandemic the analysis spotted a trend in the narrative of these reports that suggests these organisations have repurposed and have defined new KPI's/measurements. At the start of the pandemic the narrative was very much about driving economic benefit, but by the end of the pandemic, the tone in the reports had moved very much to driving future legacy and social benefits to the destination. The UK is a good example of this – an industry body, The Business of Events, arguments to government pre-pandemic were nearly all about the financial value of the industry, whereas now the argument is about how business events change lives and the social legacy of events to the destination.

During the pandemic government funded bodies, including convention bureaus, had a dilemma. There was no financial value to the State in furloughing staff within a government funded convention bureau, however the normal activity of the organisation had fundamentally changed. The day-to-day work of coordinating efforts to get in-person events to the destination had simply stopped and for some time in the pandemic convention bureaus were sorting out cancellations rather than confirmations.

Added to this was that the event planner audience to which they had routinely marketed had all but disappeared or had turned to organising virtual events for their clients, which for an organisation charged with getting people to the destination was of little benefit. Some therefore shifted attention on their activity into areas not fundamentally about destination promotion. The Future Role and Purpose of Convention Bureau Report mentions CVB turning from, being “destination experts” to “industry hubs” and helping to support and create connectivity between local business, delegates and the congress organiser.

TREND L

Significance of CVB role

At the start of the pandemic the narrative was very much about driving economic benefit, but by the end of the pandemic, the tone in the reports had moved very much to driving future legacy and social benefits to the destination

role still requires business activity



Economic benefit is the key metric for many government funded tourism bodies and CVB will still need to create business opportunities for the industry stakeholders

longer term legacy



Many CVB have become more aware of the importance of legacy for the events in their destination and the potential for events to become more important than just tourism

social sustainability



Whilst environmental sustainability will continue to be important, many CVB are increasingly playing an important part in creating opportunities for events to be measured in terms of social impact

partnership



Buyers behaviour has significantly changed and a partnership approach between stakeholders and the DMO/CVB will improve chances of success



The Mega Trends And Great Enabler



The key question to answer is what drives a delegate to decide to attend an in-person event.

In-person events need attendees otherwise they are not economically viable – a point that is seemingly underplayed in the events industry is that events are conducted for business reasons, and therefore for economic gain. Business events are about business.

People attend events in-person to learn, to network, for their professional development so they can do their job better and therefore be better rewarded. Events are organised, be they internal or external, for companies to tell their employees or customers about products or services so that they are better able to sell or purchase that product or service. Associations organise events to drive membership, connection and education, and to finance their operations, and the attending delegates pay to receive those benefits.

Destination choice, the budget, venue terms and conditions all have a significant influence on the economic success of the event. Getting the right balance can lead to a very successful event, getting the balance wrong can be critical. Associations that organise rotational in-person events have a fundamental risk in that they are inherently creating a new event each edition. The event may survive one or two negative years, but an audience can quickly dissipate for event organisers if the balance is wrong.

Ultimately events only happen through a human interaction. This could be in-person or via digital means but there has to be a predetermined discretionary choice for the parties to be present. Without people attending there are no events. Therefore, viewing the supporting trends through a human personality behaviour lens – the three mega trends - as to why they would attend, gives a clearer indication of what trends exist and to what extent they may develop within the business events sector.

These human personality traits are then linked by the great enabler, technology.

Mega TRENDS

1

Personal perception and self interest

Attendees' opinions are now the most important factor in an event. Not only in making an event commercially viable, but in how the event is structured, the content and design of the event

Convenience

Accessibility, ease, and straightforward booking structure help both attendees and event organisers alike

2

Sustainable and ethical choices

Attendees will want to make their own ethical choices and have ethical choices made for them by event organisers

3

The Great Enabler

Engaging attendees is critical, before, during and post event. Attendees want to engage via technology and this can be a mine of data for sponsors

Personal perception and self-interest. Attendees' opinions are now the most important factor in an event. Not only in making an event commercially viable, but in how the event is structured, the content and design of the event.

Until recent years most measurement of an event's success was in terms of numbers. If a Congress or Trade Show was showing positive growth in attendance numbers, and ergo revenue, then seemingly that was the metric used to determine success. Fewer events were measuring the impact on delegates, the return on investment, the cost per acquisition of them returning and overall satisfaction. As the world of social media has allowed everybody to have an opinion, event organisers have learnt to better capture and measure these opinions for the benefit of the future marketing of the event. This means that the attendee and their perceptions of the event have dramatically risen in importance.

The meta-analysis research showed a clear distinction between comments made during the pandemic regarding the future role of in-person events and those made in more recent times. There has been a clear rush back to in-person events as people turn to events to get a sense of things. At the start of the pandemic much of the discussion about the future of attending events was led from a budget or procurement standpoint. By not attending events, or only doing them virtually, significant financial savings could be made. The cost of travel and accommodation could immediately be saved on and the Financial Officer would be happy. However, this saving money argument was then superseded with the Human Resources Officer argument about personnel development issue and corporations recognising that employees attending events can foster better client and colleague relationships. If anything, it could be argued that the pandemic has given in-person events more value. If employees gain better client and colleague relationships, then they are likely to perform their jobs at a higher level and drive financial value to the corporation.

Pre-2020, and even during the early stages of the pandemic, there was seemingly little recognition of what really drove people to attend events. Success as discussed was measured in terms of numbers and meeting budget, and ROI measurement was in its infancy. With the enforced switch to digital platforms during Covid came a realisation that the attendee was now much more in control of their experience at an event than the organiser may have realised, and that the attendee would want that in the future for in-person events.

MEGA TREND ONE

Personal perception and self-interest

number one



Attendee is by far the most important factor

opinions matter



Everybody can be a critic and share opinions on events

empathy



Events offer employees a sense of belonging

learning



Delegates go to events to learn, not just be seen

improve



Continued evaluation of event and attendees ROI

For instance, attendees in a digital world can dip in and out of plenary sessions, turn cameras off and do other work, attend 'rooms' for only a few minutes or less before deciding the content was not for them. During in-person events this sort of behaviour was unlikely to have happened, but a realistic fear as events have now returned to in-person is that it can. Now it is not uncommon to see delegates during a plenary session tapping away on their smart phone or more brazenly have their laptop open doing other work if the content doesn't engage them. Organisers have to ensure that content is more personalised to keep audience interest. There is a much stronger feeling of "is this relevant for me" at events so more direct content that resonates with the attendees is critical. Delegates want speakers and content that engages them, not sponsored speakers giving a corporate line, and they are now more likely to listen and relate to speakers outside of their industry that bring a real-world relevance.

The issue of personalised content and this content being more aligned to the individual has become key. Organisers will need to confirm speaker content far earlier, but at the same time be flexible to change depending on external political and economic factors, and not least technological. Furthermore, organisers will have to help attendees filter information; the world is confusing, as well as polarised and disinformation making the current world environment hard to decipher. So, the content that attendees are demanding needs to consider speaker selection, shorter sessions, up to date topics, horizontal connection with real world relevance and asynchronous content.

Commitment though is increasingly a last-minute thing. Whilst the internet has created enormous opportunities for organisers to sell and coordinate right up to the start of an event, that also brings increased opportunity for in-person delegates to sign up late. The pandemic has only hastened this, and evidence suggests this is here to stay. This will create challenges for local suppliers to manage and risk will become an increasing factor. The bed block booking model will have to be flexible as organisers won't take on the risk as numbers for in-person events will not follow a historical pattern of registration booking.

The shift in working patterns has also made the personal decision of attending events more acute. This may be a greater factor in attending one day events, or evening receptions, than perhaps a three-day conference; but again makes estimating numbers for in-person events much more of a challenge. A potential impact on the longer three-day conference example is attendees now can make a choice not to attend evening receptions or dinners preferring to do their own thing. In the past this

MEGA TREND ONE

Personal perception and self-interest



what is in it for me

Delegates are far more likely to judge the content and event on a self interest basis. If there is nothing in it for them then they won't go



personalised content

Content needs to be specific to the individual



relevance

Delegates will want everything to revolve around what they want to learn



commitment

Sign up will only get later and later



self managing

Delegates will do their own thing rather than be in a herd

behaviour would have been viewed negatively, but with the delegate making their own better educated choices, organisers are by and large powerless to stop this personal decision. These personal decisions will have an impact on the sponsors perceived value if delegates are choosing not to attend certain parts of the conference itinerary.

The work from home pattern has changed already in the six months of 2023 – companies, particularly in technology and finance, that were very public in their statements in 2022 that they couldn't see a future for the office and that staff could work from home for ever, have, a little more quietly back tracked, and staff are being told to return to the office more frequently. The impact therefore of this trend may be more limited than perhaps first thought, however it seems that some flexibility to work patterns is a trend, though perhaps the upheaval through the pandemic only hastened a shift that had been happening for many years.

Changing demographic

The demographic of the workforce is also a consideration. As Generation Z – those born since 1995 – are now estimated to make up 25% of the working population, there is a default argument that because they are a different generation, they need different factors to persuade them to attend events. That said, in-person events have proven to be the most effective way to drive employee wellness and retention, encourage company culture and corporate values, improve team bonding, and increase professional development. Despite what generation delegates may fall into, these are universal needs, however the actual content, and how it is consumed by different generations, will continue to develop as the new generation of in-person event attendees don't want to be ushered into a ballroom to sit and listen. Although outside the date range of the Meta-analysis a 2017 study by the Experience Institute¹⁰² is a useful reference in that the choice of destination influenced 78% of attendees, whilst 92% were influenced by a need to continue their professional development. The same report suggests that younger generations value in-person events more highly than older generations. This is backed up by a report from Eventbrite that in today's hyperconnected world, people are constantly seeking meaningful experiences. Millennials and Gen Z, in particular, are hungry for genuine connections and real-life moments. According to a 2021 study by Eventbrite, 90% of 18–34 year olds had attended at least one in-person event in the past year, a significant increase from 82 percent in 2018. One of the primary reasons behind this growth is the dissatisfaction Millennials and Gen Z feel with the constant presence of mobile phones,

MEGA TREND ONE

Personal perception and self-interest



destination factors

There is a self-interest in visiting a destination that has motivational factors for the attendee



purposeful

A purposeful event isn't complete without a destination that reinforces that purpose



authentic

Experiences are highly personal – what one person considers high adrenaline fun can be another person's bête noire. However, there is a consumer desire for authenticity



changing demographic

Don't assume they all want something different



relevancy

It is not just about facilities and the missing part of the jigsaw is relevancy

social media, and other devices consuming their time and attention. Eventbrite reports that nearly 80% of Millennials believe attending in-person events helps them feel more connected to others, their community, and the world. Additionally, 75% of them think that attending in-person events offers insights beyond what they can find online and enables them to make a more significant impact. Another pattern of self interest in the workplace is the gig economy. Freelancers and part time work are more commonplace than ever, and organisers need to consider how to engage them in events. It is likely to be a factor in the continued short-term nature of enquiries and last-minute sign up to attend in-person.

Destination factors

This behaviour of personal choice and perception also extends to the destination, and the suppliers, being used. There is a self-interest in attending in-person in a destination that has motivational factors for the attendee. If the issues of accessibility and cost were truly the only factors, then every in-person event would be held at an airport hotel. This clearly isn't the reality and the choice of destination, and the choice of venues and hotels are hugely personal factors. Organisers need to make choices on behalf of their delegates and factor in this thinking into the venues they use. Events now need more emphasis on the types of food served, suppliers are needing to be more flexible and cater for more individual needs. And environmental sustainability plays a key factor here particularly with regards to food waste; as this is driven by the wishes of the individual delegate. Delegates are also consumers, so as we see a shift in consumer behaviour to more ethical choices, there is no reason to suggest that this behaviour won't also be seen in delegates. Delegates will show greater interest in where the food they are consuming is from and will prefer locally produced with less 'food miles' attached to it. These wishes though come at a cost and organisers will have to balance budgets against the wishes of their delegate attendees.

The appeal of a destination is important, but this too has to be balanced with content. However attractive a destination may be perceived, if the content doesn't create a compelling reason to visit, then genuine attendees won't choose to go in-person. However, the destination can be a major part of the success of the event. Essentially, a purposeful event isn't complete without a destination that reinforces that purpose. And today's more travel-happy attendees aren't just looking for business, they will also value the appeal of a destination for a leisure extended stay.

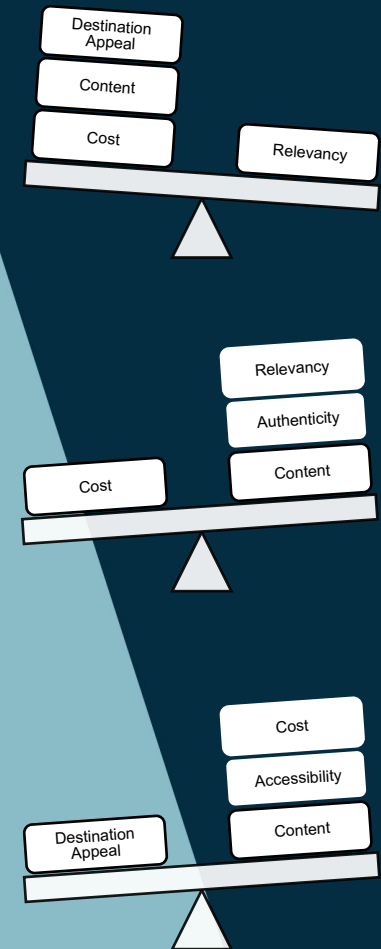
Experiences within a destination also add to the appeal. Experiences are highly personal – what one person considers high adrenaline fun can be another person's bête noire. However, there is a consumer desire for authenticity. This doesn't mean everything has to contain centuries old culture, but it does need to be authentic, and experiences need to be balanced against cost. Organisers say these are likely – along with food and beverage – to be the first thing queried if costs need to be reduced.

Relevancy

Whilst the self-interest and personal perceptions are major factors in choice, the issue of relevance plays a major balancing act to all of these. Capital cities, normally because of their population size, number of industry sectors and being the head of national government, have the greatest relevance particularly for associations – hence why only 3 noncapital cities are in the top 25 of the ICCA rankings. However, other cities and regions that specialise in specific industry sectors can display a greater relevance that can favour them despite other trends such as cost, accessibility or indeed other personal perceptions working against them. Highlighting the knowledge that a city has in a particular sector, also highlights the opportunities for the event organiser and event delegates and make the choice of that destination far more relevant. Knowledge can be in many areas of industry or education, and destinations that are best able to combine that approach alongside promotion of facilities create that greater relevancy.

There is no single solution in the evolving balancing act

As factors are ranked differently by different potential attendees it is a continuous balancing act to work out the perceptions of what influences the final decision to attend by individuals. What is more important to one is less important to another and can outweigh other factors.



Convenience. Accessibility, ease, and straightforward booking structure help both attendees and event organisers alike.

Transportation

Due to a number of reasons, not least environmental sustainability and the change in working behaviours, the ability to get to a destination efficiently is a clear trend. There is though a counter argument about cost. If it is cheaper for an international delegate to fly via another destination, then the lower cost may outweigh other factors such as time.

This is not to say that destinations that don't have airport connectivity can't offer convenience. Travel within the destination itself is cited as an important factor. Attendees don't want to be stuck in traffic or have long or difficult journeys once in the destination and this can affect the appeal of the destination. There is also a trend for different types of transport to be used; using coaches to ferry attendees around the city, slowly, is seen as quite old fashioned and attendees want more options.

Attendees now increasingly want to explore the destination, and they are seeking convenient opportunities to do that. They are more likely to extend their trip, especially Generation Z, and more likely to do this in a destination that has appeal to them. The business events industry has seemingly attempted to distance itself from the leisure tourism industry, although many of the destination's assets as a leisure destination can drive increased attendance at business events.

Attendees are likely to be flexible in how they book extensions to the business event. They are likely to seek different accommodation offers and experiences outside of those they use for the event, partly due to budget but also because they seek the authentic experience. Attendees also want easy access to local information, ideally personalised for them as well.

MEGA TREND TWO

Convenience

ease of access to..



For some delegates getting to a destination conveniently, quickly and efficiently is key

...and around the destination



It is also important to be able to get around the destination itself easily. Convenience dictates less time stuck in traffic and other delays

delegates are tourists



Delegates will want to explore the destination outside the convention space

commitment



Delegates unlikely to sign up to the hotel booking platform but will source their own solutions for accommodation

flexible agenda



Delegates want the convenience to meet who they want, when they want

Before and during event

With a growing tendency for delegates to commit to attending at short notice, the convenience of agreed rates at hotels as part of a room block is dissipating. With numerous online options now for booking accommodation, attendees are far more in control of their own travel itinerary. A challenge for cvb's is ensuring that there is enough hotel capacity for attendees signing up later for in-person events. For residential conferences there is less risk for the hotel, so there might emerge a trend for hotel suppliers to prefer these in-house events over city-wide events as they are more in control of their own inventory.

This convenience also needs to stretch to networking. Attendees are expecting organisers to create more convenient opportunities for them to meet potential business partners outside of the conference room.

Implications for industry

Organisers are also looking for convenience when managing the risk for their events. Obviously, the impact of the pandemic created more awareness of terms and conditions, and particularly force majeure clauses but risk goes further than just contractual. Event organisers are now considering regulatory risks from changing laws within destinations, financial risks from exchange rates and inflation, branding and public image risk particularly during uncertain economic times, as well as safety and security risks. Destination appeal on these factors will be important to event organisers, particularly stability of currency and political stability.

Sustainable and ethical choices. Attendees will want to make their own ethical choices and have ethical choices made for them by event organisers.

Sustainability is more than just the environmental dimension

Whilst the climate and environment are of immense importance, it is part of a number of ethical and corporate sustainability goals. As many corporations and associations already have their own environmental sustainability goals, it is now an expectation at in-person events that there will be sustainable practices in place to help achieve these. There may be resistance from some to paying extra, partly as they believe sustainable practices are now the norm, but the expectation is they can be and are delivered.

The other corporate goals, particularly around diversity, equity, and inclusion and also their social, and corporate governance will become increasingly important. Attendees with a self-interest will challenge event planners as to how their choices align with those values. There may be a need, particularly for associations, to demonstrate greater transparency in why destinations and venues have been chosen. This could include more transparency on payments received in the form of subvention that some destinations practice.

From promotion to measurement

There is little doubt that we can expect the levels of climate impact reporting from events to increase. From choosing destinations that promote environmental sustainability, to selecting sustainably certified venues, organisations are implementing stronger strategies and processes to minimise emissions from their events and report on this to their internal and external stakeholders. However, with regards to this measurement of environmental sustainability, two areas of potential confusion are credentials and carbon measurement. There appears to be no single global standard to demonstrate if a venue has environmental best practices in place or how carbon measurement is done, however organisations will require more than carbon offsetting to ensure to their attendees that ethical choices have been made. It is the same with the issue of flight

MEGA TREND THREE

Sustainable and ethical choices



risk management

Organisers have to think of their attendees reputational risk



not just environmental

Companies are interested in their wider sustainability goals, not only environmental ones, and social sustainability plays an increasingly important role



accurate measurement

Whatever the goal or objective, the measurement has to be accurate and provable to avoid accusations of green and social washing



speaker diversity

Speakers should be from a wide range of diverse backgrounds, genders and demographics with inclusive language used throughout all event communications



local CSR

Delegates want to be educated, meet the locals they are helping and feel connected to the local community through their actions

shaming – whilst some attendees will decide that the flight is not essential, it is more of a reflection of the actual need to be at the event. If the content and value are there, then delegates unwilling to fly will travel through more environmentally friendly means.

DEI and CSR with purpose

The meta-analysis has also identified an increase in effort to improve DE&I initiatives within the event industry and this will continue to be a priority to create in-person events that are more inclusive and accessible to all. This isn't just in terms of physical attributes and selecting venues that are totally accessible, but making sure that speakers are selected from a wider range of diverse backgrounds, genders and demographics and ensuring that inclusive language is used throughout all event communications. It is a very multi-faceted challenge, and choosing venues accessible to all is not always straightforward in older European cities, however collecting accessibility requirements information from delegates allows informed choices to be made, and it is straightforward to ensure events have inclusive language and communication tools available to all.

Whilst CSR practices have become quite common place at in-person events, a growing trend is for these to have purposefulness. Delegates no longer want to just do something without some association to their event or industry. They want to be educated, meet the locals they are helping and feel connected to the local community through their actions. CSR activities have to be authentic and not at risk of being viewed as a tick box exercise.

The great enabler is technology. Engaging attendees is critical, before, during and post event. Attendees want to engage via technology, and this can be a mine of data for sponsors.

Consumer purchase behaviour has changed significantly with the advent of technology in the last two decades. The internet initially allowed information to be accessed, then Web 2.0 created an interactive read-write web, as well as the social web. The ability for consumers to reach limitless reviews, opinions from user generated content, has meant anybody in the supply market has had to radically change how they approach consumers. Purchases are made last minute, there is more choice, it is easier for products to come to market, consumer expectations are for more and for it to be available immediately.

Conference delegates are also consumers; therefore, this behaviour replicates itself in how they wish to attend in-person events. Consumer behaviour is consistent, except for certain 'life' purchases such as housing, therefore technology has and will continue to revolutionise the events industry as it has every other transactional industry. Technology has enabled event attendees to look at alternative accommodation options, arrange their own flight options and activities. For the event organiser it has created challenges as the commitment to attend in-person events will continue to be last minute and the vast amount of alternative information available means their suggestions will be challenged by attendees, and these opinions shared with the audience. Technology has also allowed greater promotion of events to wider audiences and has helped increase attendee numbers. However, because of the trend for last-minute sign budgeting for face-to-face events will be more challenging.

The ability of technology to improve the pre-event, post event and actual event experience is only going to expand. The change in delegate behaviour to mirror that of generic consumers will revolve around data and attendees are seemingly happy to share more information on registrations pages. As this report has detailed, attendees want fluid agendas with several options that appeal to their different interests and preferences and there is a growing trend to crowdsource the agenda beforehand, and to achieve this they will need to be willing share more data than before.

THE GREAT ENABLER

Technology



delegates are consumers

Delegates make individual choices and think like consumers. What influences them as consumers will influence them about events



tech creates a wider audience

Audience numbers can be increased through the use of technology and more importantly a different demographic can be reached



data goldmine

The data from delegates will be a key driver in business success of events, and sponsors will demand richer and more relevant information about attendees



spontaneity

Apps will encourage audience participation and ensure flexibility of agendas. Attendees will be able to engage with speakers outside of the four walls of the meeting space

Linking the delegate to the destination

Technology also has a greater role to play in the event destination. Attendees can utilise event apps and platforms to engage with local suppliers and services to promote environmentally friendly and shared travel options. As explored in the authenticity of activities, event delegates are also leisure travellers and have a desire to explore the destination they are in. By linking user generated content with suppliers and the event itself, destinations can play an important part in promoting authentic experiences in their destination, ensuring delegates are fulfilled by that experience and maintain a positive reputation as an event destination.

THE GREAT ENABLER

Technology



flexible agendas

Attendees want more control over the meeting agenda and technology gives them this opportunity. Gone are the days of static pre-published itineraries, speaker following speaker on a stage while attendees remain seated



better pre-site tech

Delegates and attendees want access to more than floor plans and want ability to get personalised detail and information prior to the event



marketing

Tech will allow greater exposure to sponsors, greater insights from attendees and greater ROI for both



crowdsource

Expect agenda to be crowdsourced and ideas encouraged in real time to ensure content is fresh



Section Two

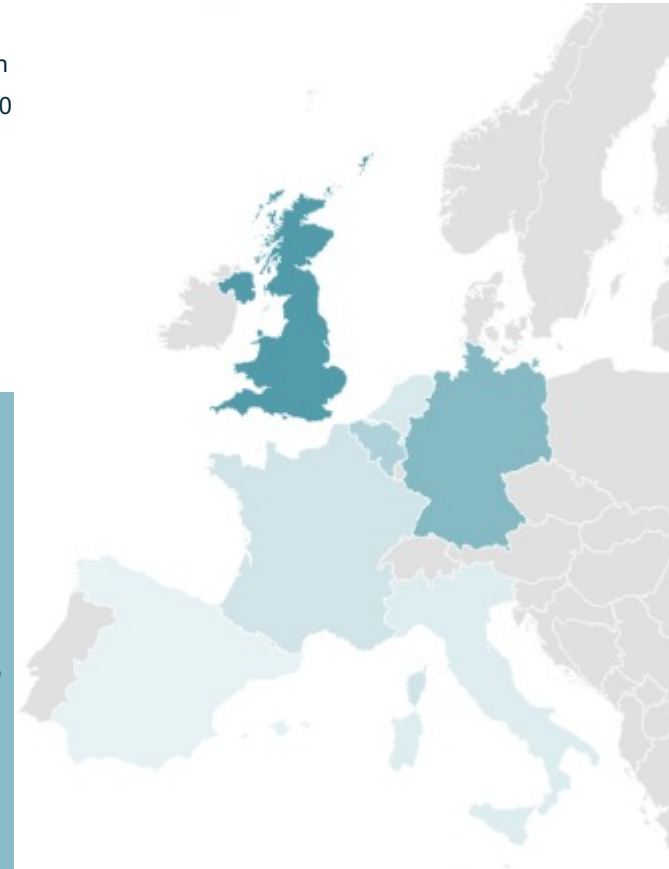
In Depth Analysis Into Four Industry Sectors

Introduction

This section contains the secondary analysis with in-depth examination of how the mega and supporting trends, explored in section one, impact four key sectors of the wider business events industry. As part of this secondary analysis - in order to obtain expert buyer opinion regarding the impact of the different supporting trends and mega trends within the meta-analysis - over 240 individual event organisers were surveyed and from those 75 individual event planners interviewed. We have also drawn information from the MMGY Intelligence Portrait of European Meetings and Convention Travel survey results in June 2023 with an additional 193 planners and over 1,600 event attendees surveyed.

The audience were nearly all European, with a weighting towards the key markets of the UK and Germany and over 50% of those surveyed and interviewed have over 20 years' experience in the industry.

- ✦ 57 European based associations were surveyed, and 21 interviews conducted.
- ✦ 12 leading European based PCO's were surveyed, and further interviews conducted with 12.
- ✦ 23 event agencies were interviewed from the 90 surveyed. There was a weighting towards to the UK as the predominant market with 45% based in the UK. All the agencies surveyed are based in Europe.
- ✦ A focus group with 9 members of the Alliance of Independent Event Agencies as part of a MMGY Hills Balfour sponsorship with the AIEA.
- ✦ 55 corporate companies were surveyed and 19 interviewed at The Meetings Show in the UK and at IMEX in Frankfurt.
- ✦ An additional 150 incentive travel participants were surveyed – based across Europe.



The interviews were carried out as a mix of group and individuals and deliberately designed to challenge perceptions, create dialogue and discuss the merits and impact of each of the trends. From these surveys and interviews we aimed to find out if trends were longer term in nature and therefore a significant shift from previous trends or are they just a short-term fad. This is not about creating yet another survey ranking, so opinions that may contradict each other have been shared as in the different sectors there are different buyer motivations.

This secondary analysis was deliberately performed with an unbiased approach, so we also conducted this secondary analysis with buyers without telling them the brand. This was done so that the audience would give unfettered opinions. Any destination has perceptions linked to it, so to ensure their perceptions of Denmark, sometimes incorrect, didn't distort the discussions we kept the name confidential. We also conducted the research under Chatham House rules, encouraging debate, and full discussion but with no reference to the individual stating those opinions. A separate section of the research will cover the perspective of Danish based buyers and their context of organising events both in and outside Denmark.

The choice of the type of event, the destination, and the content itself all need to be viewed in the context of global and personal issues. It is the reason this report refers to human consumer behaviour in the Mega Trends. On a global level the world is facing a climate crisis, politics is polarised, the pandemic created an even greater divide in wealth and poverty, and society is becoming increasingly aware of diversity, equity, and inclusivity issues. On a personal level event attendees are facing individual challenges: keeping their knowledge and skills relevant in a world of information overload, expanding their networks, and being more aware of their own and others well-being. Meanwhile employers and sponsors are trying to get maximum value at the lowest cost and event organisers and host venues are both trying to make a profit. There is no single simple answer for those in the conference supply chain – it is a question of getting the right balance correct to the right customer.

Four key SECTORS

1

Congress

Events for an association, or other type of membership organisation, either organised in-house or by a Professional Congress Organiser

Meetings

B2B organised by commercial conference companies or in house meetings organised by companies for employees and customers

2

3

Incentives

Corporate recognition programs normally with delegates attending from same company and organised in house or by event agencies

Trade Fairs

Organised by companies selling exhibition space and attracting visitors to attend for personal and professional reasons

4



Executive Summary

Section Two



The four different sectors of the events industry do have idiosyncrasies however whichever sector an event is in, it simply will not happen without delegates attending. Therefore, each of the Supporting Trends and the Mega Trends do to varying degrees have influence in each of the sectors.

Organisers in each of the four sectors agreed that there is a strong trend to return to live events, with organisers stating that this was by some degree their preferred and the option they are acting on, but that hybrid does give them some opportunities. The exception here was incentives, none of the organisers could really see how a hybrid experience for an incentive could really deliver on the experience expected.

The last-minute nature of the events sector was also a common trend with all organisers commenting that this creates a financial risk, a challenge not only with accommodation and venue logistics but also with regards to content design. Congress organisers in the association sector see a trend for the rotational nature of events changing as they wish to mitigate their risks. This may mean more use of cities that lower their financial risk because the organiser is more certain of event attendance. The appeal therefore of a destination becomes important, but this trend is also countered by a desire to also explore new places to grow membership and social legacy. As with all the Trends explored in Section One this is a balancing act for organisers.

There was general agreement that attendees want more connection opportunities and an understanding that there is a desire to explore the destination the event is in. Likewise, across all four sectors there is a similar trend regarding the importance of content and how attendees want more input into the creation of it.

All four sectors agreed that the working from home trend means they must make their events more appealing and more relevant to the attendee and that the wishes of more stakeholders involved in an event's curation are now considered. Another common trend amongst each of the four sectors was a desire for events to be more measurable to demonstrate their success. This measurement is being delivered more accurately and with numerous metrics by technology.

Accessibility is an important trend, not only in terms of transport to and from the destination, but also in ensuring that every aspect of the event, from the destination to venue and activities, are welcoming to all.

Sustainability plays a strong role in each sector, particularly when companies are attaching their name to the event. And each sector agreed that there is a trend for both delegates and sponsors to be asking more questions about the organisers choice to ensure they are ethical. Each sector agreed there is a trend for authenticity, driven by consumer behaviour, and in part by the questions attendees now pose to organisers.

The final trend regarding the confusion of the role of a convention bureau also had some consistency across each of the sectors. Congress organisers were more aware of the support on offer and ability for the CVB to connect the event with local businesses whereas many event agencies still seemed to struggle with the 'free' service notion CVB offer and the change from enquiry assistance. The change in emphasis identified in the meta analysis may have confused event organisers. The event planner audience still believes the single most important role of a convention bureau is to support them in the enquiry stage, to aggregate various suppliers and in adding value to their event. Stakeholders still believe that the role of the convention bureau is help bring them enquiries, coordinate destination sales efforts and to get people to the destination. And governments that mostly fund convention bureaus through tourism divisions, measure success based on volume and occupancy of hotels, and ultimately tax revenues. There needs to be a careful balance between the needs of stakeholders and the needs of customers if a CVB is to continue to deliver value to both.

Statements such as this one from a DMO press conference at IMEX Frankfurt “we would prefer 100 of the right kind of delegates than a 1,000 of the wrong ones” confuse the market. Stakeholders want their bedrooms filled, as does the local tax office, governments want employment and a sustainable economy. In-person event planners don't want to be told that they are trying to bring the wrong kind of delegates. It is a small industry, event planners move from association to association, from event agency to another event agency and they will continue to put forward destinations that help them rather than hinder them.

This sub analysis examines how the trends manifest themselves in new congress formats and concepts, and the buying decision process.

Summary

The congress format now includes far more consideration of the needs of the individual delegate. Events are no longer measured as successful based just on numbers and budget, but through other metrics now easily obtained via technology, such as engagement and overall satisfaction. Congress organisers are having to involve more stakeholders in the event design, ensuring all participants are getting their perceived value. The format of agendas will increasingly become more fluid, raising challenges to both attendees and organisers to ensure that there is a balance between enough content to justify attending, but not so much that the agenda become rigid. We suspect that networking sessions may increase and not only centre around refreshment breaks. Agendas will reflect a need for different types of engagement with more ability for the delegates to speak, rather than be spoken at.

The buying decision making process for congresses will continue to challenge destinations and other suppliers. With later and later sign up to events organisers will be unwilling to burden too much financial risk and destinations may need to explore ways to mitigate this. The traditional peripatetic rotating event may also change as the financial risk of going somewhere different each year is potentially too much for organisers to consider and we may see an increase in more multi-year congress contracts being signed between cities and association organisers. There is also an ongoing shift in what destinations need to demonstrate in their response to association event RFPs as organisers demand more information and proof regarding sustainability, both social and environmental.

Congresses – Associations



Increased stakeholder involvement and measurement of success

The most striking change is that more stakeholders are now recognised in the choice of destination and format of the event. After the return to live events, organisers have included more stakeholder recognition in discussions of the event. This is not just with sponsors, but also attendees, the attendee proxy, and the destination. There has also been greater recognition that attendees are motivated to attend by personal and organisational benefits.

There has been a recognition that, as with any personal purchase, prospective attendees should assess the value of a conference before attempting to convince themselves or their company to purchase a registration. Post-conference, attendees will need to assess whether they received positive value for their time and investment. This value can be demonstrated through conference reports, inspiration, key learnings, and network growth. With better measurement metrics event organisers now are far better equipped to create this value for their delegates and it is now only basic events that still rely on overall numbers of registrants as their metric. One challenge organisers have is of distraction due to delegates not being fully engaged at the conference however by creating better connections and content the perception of this value will increase, and it is likely that there will be more measurement during the congress through technology.

Risk management, importance of cost and driving value

For many associations the regular congress has and remains an important part of their revenue generation and their membership value. Not all associations we interviewed suggested they had to make a profit from their main annual event, however they did suggest that they could not afford to lose too much revenue on their events and wouldn't wish to have consecutive years with a negative financial result. Reasons why an association may be prepared to have a deficit year from their event included a special anniversary of the formation of the association and the outgoing of a longstanding executive.

Some associations have very specific fixed financial goals from their events as those revenues are important to balance other running costs of the association, whereas other associations have fewer specific needs and see the annual event as part of their overall annual event costs and take a more variable view of the income from the main event. But in conclusion whilst there are exceptions it is predominantly critical that the association's main annual event creates profit for the association.

CONGRESS

Significance of trends

The buying decision making process for congresses will continue to challenge destinations and other suppliers. Congress organisers are having to involve more stakeholders in the event design, ensuring all participants are getting their perceived value



delegate at the centre

The congress format now includes far more consideration of the needs of the individual delegate



satisfaction and ROI

Events are no longer measured as successful based just on numbers and budget, but through other metrics now easily obtained via technology, such as engagement and overall satisfaction



last-minute sign up

With later and later sign up to events organisers will be unwilling to take on too much financial risk



sustainability

Organisers will demand accurate metrics on environmental sustainability claims, but also seek social sustainability actions



risk

Organisers will want to share the risk with destinations and other benefactors of their events which will potentially upset the subvention model

This created an interesting debate about associations wanting to make a profit from their events but also requesting subvention from a destination. Essentially some suggested the subvention was there to mitigate risks in choosing that destination. Others were a little more forthright in that destinations are receiving significant revenues from an event and believe the association should receive a return from this. When challenged as to the revenues received back to the association are revenues indirectly spent by the attending delegates themselves and therefore the association should conceivably charge less for attendance, the argument then reverted to risk mitigation and to some extent about legacy generation benefits for the destination.



“...we do need to take on more of the risk. We should be prepared to offer incentives for those signing up to our events earlier so that we can commit to venues. However, we also have to be flexible with regards to content, so it is not an easy balance”.

The issue of risk is predominantly around the continuing last-minute sign up to events. Organisers are understandably wary of committing to venues without a better idea of their numbers, and venues are understandably wary to commit their space to an organiser unable to guarantee them revenue. Organisers seem very quick to say that venues and hotels need to be more flexible but in an industry that is unique in that its commodity perishes every night the risk needs to be better balanced. Hotels cannot stockpile bedrooms to sell at a later date, they either sell them or they don't.

As more organisers steer away from committing to room blocks on behalf of their delegates, some organisers commented that a recent challenge they had faced was the inability for their delegates to secure accommodation in the destination. This is unlikely to be a long-term trend and was most likely caused because of the boom in leisure travel post covid and the need for leisure tourists to use up credit vouchers with airlines and hotels. There has also been a huge demand for postponed concerts and music festivals to such an extent that STR Global recently published the Beyonce Influence on how large concerts impacted hotel rates and demand levels in specific cities in both the UK and Sweden.

As credit vouchers were consumed, suppliers have had to increase costs to new customers and there has been a significant increase in hotel rates in Europe – in Paris rates have increased 50%, London 30% since 2019 but occupancy levels have remained by and large static so the availability issue should quickly find its normal level.

It is unsurprising that cost and accessibility are important factors. As with the other event types, organisers feel that their attendees value their time more importantly than perhaps they used to, and therefore they felt a need to seek venues with good access and minimal downtime. The inconsistency is that organisers say they feel that delegates add more leisure trips around the event than they used to. Whilst this is welcome it is also difficult for organisers to capture accurately.



“...it is only a feeling as nobody really wants to admit that they chose to attend a professional conference because of the destination and using it as an excuse to have some holiday. But I can tell you from the higher rate of Out of Office we receive to our communications immediately after the conference, there must be some sort of relationship.”

The discussions around costs covered two areas (i) costs for the organiser and (ii) costs for attendees. We challenged if the costs for the organiser are also passed onto the attendee in terms of registration fees. And whilst this was broadly accepted, they feel it is important to try and keep some consistency from year to year on registration fees.

The cost for attendees was something that organisers were aware of but also feel there needs to be some consideration that it does tend to balance out. They recognise that certain cities and countries are more expensive for certain things than others.



“...every few years we may try to use a cheaper destination so that we can improve our profit margin, however we don't pass this saving on directly as it lowers the perceived value of the event with regular attendees and sponsors. And if we are changing the amount every year it creates budgeting issues both for us as the organiser and the attendee. If they attend one year and it is €700 and then then next it is €1000 then they might get challenged to justify their attendance, so it is better to keep at €900 with just perhaps inflationary increases.”

The destination appeal

Cost is not the only factor that influences how attractive a location is to organisers. An equally important factor is the overall quality of product in that the destination. Conversely, risks and other negative issues, such as natural disasters, political and/or economic turmoil, high crime rates, poor infrastructure and inadequate international connectivity, can be major deterrents to organisers and their attendees. That said, there is a general trend that the destinations with higher cost and quality of product also rank higher for eco-friendliness and sustainability and the most successful business event locations are currently those combining ease of operating the event, a high quality of product and demonstrable value.



“We know alcohol is more expensive in certain countries than others due to tax. But then the taxis and public transport in those countries might be cheaper. It does tend to balance out. Some of the most expensive cities also offer the best standard of living and therefore experience for delegates. If destination appeal is important then costs are going to be naturally higher due to the nature of supply and demand. Also, our delegates are only going to be there for a few days, it is not as if they are moving to live there so the difference in costs from one city to another are relatively minor.”



“We start off with a wish list and realise that we have to make decisions as to which items on that list are more important than others. Of course, we want the best service and facilities but our budget might not stretch to that in every destination so we have to be realistic with what can be achieved. If we want delegates to attend, if we want our clients’ brand values portrayed effectively, then the appeal of the destination is very important. It doesn’t need to all be 5* but it does need to portray those values accurately.”

Delegate engagement and connection

Many of the associations agreed that they now provide some sort of hybrid solution, and some were viewing this as a useful annual stream of income generation although it was agreed that the main value of an event was from being ‘in the room’. That said, the ability to appeal to a wider audience, using technology for rapid translation and editing of live content offers significant potential for associations. Whilst many do not view hybrid as an answer to generating increased membership numbers, they do feel that hybrid creates opportunities to grow a network, if not members. Virtual platforms are a potential addition to an organiser’s revenue streams but not a replacement.

Organisers did say though that attendance at the hybrid part of the event were dramatically lower now events are back to live and that engagement from the virtual community fell. Some are continuing to invest in online platforms to hold their events. That said, based on the associations we have spoken with, virtual options are not their primary consideration because conferences aren’t just about information. They are about connecting. They are about meeting colleagues, vendors, customers and friendly industry competitors and talking business face to face. Events are about walking the aisles, broadening knowledge through brainstorming and sharing ideas. Virtual events don’t offer that experience. The organisers stated that the destination appeal is an important part of that. They want the delegates to feel comfortable not just in the event venue but also at periphery events.

Conference attendees are uniquely positioned to learn from in-person impromptu discussions. Serendipity often contributes to new connections and ideas and a short conversation can trigger an insight, inspire a concept, or initiate a collaboration.



“It’s the serendipity of live events. Two people of different seniority and experience can end up in a conversation, but both viewpoints are respected and discussed equally because as delegates they are on parity. We’ve heard experiences of delegates by chance meeting on the flight beforehand and discussing a particular point that was key to the event content. That doesn’t happen virtually. I suppose as organisers we strive to create organised serendipity!”

Last minute commitment and expectations

Organisers did agree that the last-minute commitment to sign up, coupled with technology, has meant a significant shift in how the content is structured. More accepted that they need to be very flexible with speakers and allow greater input into the agenda from participants. Fire side chats, and interaction with speakers are far more common.

Delegates no longer just expect a presenter to speak at them in a darkened theatre set up and presentations have evolved from traditional topics about service to a much heavier emphasis on experience. This evolution has ushered in a whole new wave of speakers and in turn has also changed some of the audience where there is substantially a deeper level of commitment to truly engage from delegates.

With regards to improving attendee engagement, new conference technology is constantly being trialled and tested to encourage delegates' involvement and participation.

The new class of conference speakers are utilising technology to move away from the traditional PowerPoint approach and use gamification technology instead to help make attendees part of the conversation. This can be as simple as Q&A via an app, or taking part in pop-up quizzes, but the key is that the technology is turning attendees into active participants rather than passive ones, which ultimately helps to drive engagement.

The new format doesn't mean all parts of the conference will change. Organisers have said there are still some traditional conference experiences that are the most attractive to attendees and sponsors, and that being too clever with new conference formats might not be sufficiently engaging to attract repeat attendees. General sessions, keynote speakers, welcome receptions are still viewed positively.



“We know it's not just about the 9 to 5 for our events. Actually, we can control the 9 to 5 element and give the thought provoking content but what we shouldn't try to control is how the discussion then formulates after that. We want our delegates to make their own tribes and have that chance meeting. It's the serendipity. We no longer try to have organised dinners and corral delegates to sponsors events but give them the opportunity to discover the destination, meet new people within the event network and create a FOMO so that they continue to engage in person.”

Event legacy

There has been an increase in the use of the term legacy from events in recent years. The increased use is, to a certain extent, derived from tier one sport events building this into their bid documents and further fostered by destinations and associations applying legacy to international congresses. Event legacy is essentially an event's long-term cultural, social, environmental, and economic impact before, during and beyond its actual occurrence. It is the long-term positive dual impact that a specific event can leave for the benefit of people, small or large communities in the host destination and the event owners' overall vision and mission .

It is little surprise that the events industry has become a crucial platform for promoting a positive long-term impact, so more associations, businesses, and tradeshow are adopting new content models and approaches to in-person events which will include some legacy to the event. Strategic collaboration, engagement, and legacy are now at the forefront of business events planning, and many destinations play an active role in this movement and are developing methodologies to support this. However, a number of organisers interviewed stated that they feel that some of the connection to legacy has become a little tenuous and an effort by destinations for some self-justification of their own marketing activities. Many agreed that the challenge is that legacy is difficult to measure as what one organiser, or host destination, may claim as significant impact, another may think is a natural by-product of hosting the event. Event organisers are keen to remain the owners of their event rather than the destination and whilst they agreed legacy is a goal, they also agreed it was not the only goal and that for some the economic success of their members would still remain a priority.

Who is responsible for the event legacy polarised the associations interviewed. Some felt very strongly it was their responsibility whereas some organisers felt it was not their job to create a legacy for the destination, but that was the destinations own job.



“We can bring experts in a particular field to the destination. What is of value to those experts is learning from each other so that they can take that back to their work environment. If the local destination gets some benefit, then good, but that is up to them. We organise our events in different parts of the world to increase our membership and learning. Once the event is done, we are thinking of the next one. The destination should focus on delivering a good event, that way they will get repeat business and economic growth. It is jobs that creates a better standard of living and that is the simple legacy of hosting events.”

This view wasn't universally agreed with, and others had experienced the destination collaborating with the organiser and both benefitting from the legacy created.



“Legacy planning involves identifying the stakeholders and discussing with them what legacies are possible, how to enable them and who they will impact. The legacies should aim to help the local community, with strategies then put in place as to how they will be delivered and encouraging the host community to support the event. An event needs to stand out from the crowd and fight for a long-lasting future, ensuring attendees have something to remember for years to come. That legacy is a benefit for both the organiser and the destination.”

Like many of the trends identified in the events industry, the subject of legacy needs to be viewed in balance. For instance, the recent 2023 ICCA Survey¹ regarding the strategic needs of associations placed legacy 21st out of their top 24 priorities, however it could be argued this is because it is being ranked against more short-term needs. That said, it does illustrate the need for destinations to focus on delivering solutions for what the organiser needs in the immediate short term as well as creating clarity for what event legacy is and what it is not. For the future both destinations and organisers will need to have agreement and dialogue as to what constitutes true legacy. This main mean a change in business models around subvention and a strategic focus on certain industry sectors may be favoured, but however the subject of event legacy matures there will be a need for robust measurement as event legacy becomes more important for associations, delegates and host destinations.

Content remains king and technology is driving this

The associations we interviewed all stated that content was the absolute critical driver of new attendance. And as the cost of having speakers fly in and be accommodated is high, any way that the destination can introduce speakers and other content is hugely welcomed. It was a common theme amongst the target audience, for all four event sectors, that those destinations and venues that can help mitigate costs and introduce local speakers is of huge benefit.

They accepted that a number of certain delegates will typically attend the event due to a historical relationship and bias, though this number in terms of volume is in decline. The priority for these attendees is a sense of belonging. For incremental attendance, critical for organiser to demonstrate sponsorship value, the content and ability to connect is of paramount importance. Organisers agreed that the destination choice can play an important part here. Too large a destination and the delegates are too disparate, too small a destination and there is a lack of outsider input or opportunities for the event. Many stated that they wanted their event to feel important to the destination, that their

event had some visibility to the destination, but paradoxically that it isn't viewed as having taken over. Some had an acutely different view, that the event must be seen to have taken over and every experience for the attending delegate from airport arrival must focus their attention on the event. Delegates need to be able to justify why they are going and in today's world of instantly shareable media organisers believe any high-profile event branding can help validate the delegate attendance as it creates a very obvious connection to the event.



“...content and connecting are so important in justifying our reasons to attend. Gone are the days where a few drinks, a nice dinner, a keynote plenary justified the time out of the office for us, let alone the professionals we are inviting to our events. The more destinations can do to add value there the better. Particularly the connecting as that drives such value for us and the event sponsors.”

The use of technology in the form of mobile apps by associations has rapidly developed and is now an absolutely critical accessory. Associations could have been accused of organising quite structured and slightly undynamic events, and whilst event numbers seemed to be stable, it could be argued that the sector wasn't experiencing the growth that other communications sectors were in terms of sponsorship and that events were slowly decaying in terms of relevance. Whilst the impact of the pandemic was brutal for the live events industry, it has perhaps created a greater understanding of the need to communicate and a boost to the perception of the sector, but the use of technology will be critical to keep that curve trending upward. Some associations have commented that, due to their scale, they have been able to invest in the technology themselves whereas others have used white label solutions from professional congress organisers. There was no appetite for the venues to supply the technology primarily due to security risks. A corporate company organising an event for 500 of their employees is essentially organising for one customer, whereas an association organising an event for 500 delegates potentially has 500 different customers. Many organisers said that they would prefer to use a system used by multiple organisers, ideally on a global basis, that is constantly upgraded and updated, over the convenience of destination or venue owned app.



“We don't need venues to supply the technology for us. We actually want our delegates to become familiar with the technology we offer them rather than chopping and changing our supplier all the time. It may make short term economic sense to work with a new supplier each year, but working with a longer-term partner we can continue to fine tune and improve the tech, rather than having to start again every year. The tech and its ease of use is an area we get a lot of feedback from attendees about. If it doesn't work very well it is frustrating for them, even more frustrating for sponsors and can have impact on sponsor value.”

Sustainability is about more than the environment

Environmental sustainability can play a significant role in association congress choice of their destinations. However, it is only one of 17 UN Goals, and many associations are committed to meeting several, if not all, of the goals within that internationally accepted framework.



“It does seem the events industry has got stuck on the environmental subject. But there are so many other parts of sustainability. We work in construction and yes, we use water and cement, but we do so in an inclusive and innovative way. It is about creating a sustainable planet, not just ticking a green box. The events industry is in danger of greenwashing itself by focusing on just one topic. Sometimes I think they just highlight a negative aspect of events by constantly talking about it, rather than the positive outcomes that events can achieve.”

Organisers agreed that they were impacted by several external factors. The wishes of the association itself, the wishes of attendees and the wishes of sponsors. This can sometimes create a difficult balancing act and organisers accepted that sometimes they would make a choice that might marginalise one of these over the other.



“There are certain parts of the world where for instance democracy doesn't exist, but we still use cities in those countries though for our events. This doesn't mean we support people not having the right to vote. It's not hypocritical of us to go there but by using those cities we hope that we educate those there to understand what we consider should be human norms. Our sponsors understand that. We might have a slightly different demographic in the audience but sometimes the sponsors don't mind that. To them it is a business choice.”

Relevancy is of paramount importance and rotational pattern changing

In our secondary analysis of this sector a single term kept being mentioned, relevance. When discussions focused on any of the other influences on destination choice, be it cost, appeal, technology, accessibility, sustainability, content and connection, they were seemingly always balanced with the phrase “but it has to be relevant”. A destination needs to hold some relevancy for the organiser as associations by their very nature are focused on the specialism of the industry sector that body is representing.

As destinations have developed rapidly over recent decades there are now numerous cities with modern event facilities, expert services, more than adequate hotel volume and ancillary services have become a lot more available. For instance, the ICCA 50th Year report 105 indicates that in the past 50 years the number of events going to Asia and the Middle East has over doubled and market share in Europe has dropped by 25%. The world is a much more connected and easier place in which to do business and as more destinations have entered the business events market, organisers have more choice. What organisers say separates these cities from one another though is their potential relevance to their event. And whilst driving revenue, membership growth and legacy are all important the similarity between these is the destination maintaining relevance for the event.



“If the CVB can make those introductions to the right people it can create huge relevancy for us. This is more than just a local host or ambassador, we sort of expect those and it is nice to have, but we don’t need them to organise the education. We need to be able to organise that ourselves, but the CVB can help us tap into the knowledge and expertise within the destination to help create the relevancy.”

Some organisers are saying that since the pandemic they are no longer on strict rotations to different parts of the world, and that their events now are about driving value to the attendees and to the association itself. The notion of events rotating through different continents on a cyclical basis will continue for some global associations, but many now are holding smaller and more regional events. Part of the motivation here is this lowers risk and allows a more last-minute nature of sign up to be accommodated. Many of those we interviewed therefore felt that helping create the relevance for the association is an area that CVB’s could add real value to their event destination choice.



There are some obvious factors of influence in selecting a conference destination, the right facilities, accessibility, quality of service, destination image, affordability, safety and security and attractions and entertainment but...we sort of expect those and for us it is about being relevant. Relevancy adds sponsorship revenues, helps make that argument for the attendee to invest to be there in person and be engaging rather than watching virtually. Relevancy is crucial. We get approached by lots of second or third tier cities, and they talk to us about their facilities and yet another new exhibition centre...but however sparkly it might be, if there is no relevancy, we won’t use it. This is not Kevin Costner in Field of Dreams. Just because you build it, it doesn’t mean we will come. But we rarely get asked if relevancy is important, it’s as if destinations think it is all about the venue and hotels.”

In the Meetings sector we wanted to establish the trends that impact on two types of corporate events; (1) third party organised events referred to as “risk conferences” where the organiser takes a risk in arranging because delegates are paying to attend and (2) events organised “in house” when attendees are either invited customers or employees. We have also explored two themes, return on experience and the physical meeting experience.

Summary

Creating an engaging event is critical to get delegates to attend and the content has become increasingly important to secure this. The return on experience measurement has become increasingly important to prove this. As technology has created greater connectivity between delegates and event ecosystems, organisers need to continue to develop the experience so that attendees continue to be engaged. Previously the term experience had been intertwined with activities and everything outside of the actual meeting was an experience, as if organisers were able to deflect content being below expectations with fun experiences. Now attendees want the entire physical meeting to be an experience, including the content. We are therefore seeing changes to meeting structure, perhaps the demise of the traditional format with set breaks and venues having to be far more flexible with their product offer. They also want the experiences to segue with the content, for there to be less disconnect between the meeting content and the remainder of the event experience. Activities need to demonstrate values aligned with the organisations’ own values, they need to be relevant and educational.

How who is paying affects behaviour and motivations

When delegates are invited to attend at little or no cost to themselves, there are some clear differences in the delegates motivations and reasons to attend. When delegates pay, or their company pays for them, to attend, cost and accessibility are key trends as are content and connecting, as there is an expectance of a return on the investment. When delegates are invited then these factors diminish, and destination appeal becomes more important.

Meetings



When delegates pay to attend, they are more likely to make that decision at an earlier date and be less short term in nature – partly to mitigate costs but also due to making that personal commitment to the event. Those paying to attend are more likely to tell people they are going on social media and engage with the event technology earlier so that they receive increased value.

Organisers of risk conferences haven't seen any drop off post pandemic and see hybrid as an opportunity to create a different revenue stream from a different audience, especially with translation services.

Those paying expect a great deal more connection from the organiser and ability to shape the content so that it is a personalised experience. For those attending as a sponsored guest to an event there was less demand on content shaping, however there is still an expectation that there would be a value derived from attending.

The appeal of the destination is important, but the appeal of the event itself is more important regardless of where it is. That said the issue of spending time away from home and the office was important as attendees feel they are time poor and therefore the value and attraction of the in-person event needs to outweigh these issues. Those delegates not directly paying to attend agreed that they are more respectful that organisers and exhibitors/sponsors require specific value from them and in return for their attendance being free that the sharing of their data, and the detail of it, was of increased importance. They therefore expect to have a better experience and for the organiser to be more flexible. Therefore, commitment is much shorter term, but they respected that the impact from live events is much greater. Those sponsoring delegates to attend said the destination appeal is a major factor, though thought the delegates might not be so brazen to admit that.

Small internal meetings and town hall type meetings were often already utilising hybrid and virtual solutions. Some organisers commented that during the pandemic event agencies switched to selling them the virtues of a new virtual platform, but a lot of corporate companies were already using existing systems. One commented that Zoom was already 10 years old when the pandemic started, and they didn't need to invest in something that did the same.

MEETINGS

Significance of trends

Relevant and high quality content and excellent opportunities to build connections are critical to get delegates to attend

return on experience



As technology has created greater connectivity between delegates and event ecosystems, organisers need to continue to develop the experience so that attendees continue to be engaged

change to structure



Attendees want the entire physical meeting to be an experience, they won't settle for dull presentations and there are changes happening in meeting structure and agenda

free v paid



Significant changes in motivation depending on who is paying for attendance

inclusive



Organisers believe with the increase in AI and reduction in translation costs they can widen their hybrid audiences

risk



Organisers will want to share the risk with destinations and other benefactors of their events which will potentially upset the subvention model

Sustainability and authenticity

Many in house corporate organisers felt that they had their own sustainability goals and action plans and whilst they applauded efforts by venues to ensure they too practice sustainability didn't feel they should have to pay extra for those services. Some commented that too many suppliers in the sector focus just on environmental sustainability whereas they as corporate brands look further than just the environmental impact and wanted to know if the venues and hotels they were using had greater ethical goals, such as aligning to living wage policies and anti-slavery acts. Some discussed this further, discussing the authenticity of suppliers, even wanting to know the ultimate ownership of hotels and venues so that their corporate brands do not get associated.

This wish for authenticity also reflects in the activities associated with the event. The organisers made it clear that authenticity doesn't need to be steeped in centuries of history, many citing popular destinations for events that are modern cities that have exponentially grown in recent years, and that there is often a confusion from suppliers regarding culture, history and authenticity. Overall, the need for demonstrable authentic activities and ideally aligned towards their corporate goals were favoured, although many felt that it was more important for the experiences to give a destination flavour than stick rigidly to the corporate branding ideals. Some commented that they felt it was younger delegates who would query and challenge authenticity more than an older generation. The issue of activities did open a discussion on the need for relevancy and if the activities and experiences need to have some relevancy to the event itself rather than the destination.



“...just because we have an event in Scotland we don't have to do cliché whisky tasting and play golf or do Scottish dancing and hear bagpipes. If our event is about finance, we'd prefer to experience something relevant for that. The activities are about creating valuable networking for the delegates. If they create that connectivity, then they can be completely irrelevant to the event. Actually, they don't need to be authentic at all if that is what they do. Let's face it we are organising the event to get people to know each other and build business relationships. If they do that with over a glass of Australian wine in Scotland, we really don't mind.”

Managing risk - remaining flexible and keeping things relevant

The short-term commitment issue led to a discussion on digital nomads and how companies engage with contractors and freelancers for their events. In house organisers viewed them as part of the company ecosystem and whilst they may not be employees, played a critical role and would be welcome at events (but not incentives) even though of all groups they would be the one likely to sign up at the very last minute. Organisers accepted that the workplace is different, and their events have to be flexible to accommodate those demands and last-minute sign up, fluctuating agendas and different accommodation offerings are here to stay.

This issue of relevancy was also discussed with regards to venue and destination choice. When the issues regarding accessibility and cost were countered with the fact that events therefore should just take place at hotels at airport hubs, there was a discussion that relevancy then was a greater factor than cost and accessibility. However not always. Risk conferences events are created to be commercial and make money for the organiser, and organisers commented that the relevancy for them would simply be where the event would have the greatest chance of commercial success.



“We choose destinations that will keep our risk lower. Sometimes if we chose an obvious destination where there may be total relevancy for the subject matter, then there are likely to be similar conferences in that particular industry field, already taking place with well established sponsorship relationships, so actually our risk is higher even though the relevancy is better. It depends on what you mean by relevancy. Just because the topic makes sense for that city it doesn't mean organising another event there will thrive. Sometimes we lower our risk by going where the audience wants to go rather than where the subject is most relevant.”

It was this issue of relevancy that many organisers believed that DMO and CVB could add value to their needs by highlighting not only the industry sectors but also more about the social factors of a destination. The opinion as to the role of a DMO/CVB with most buyers was that they should focus on selling the destination, in particular highlighting attributes of the destination and focusing on the facilities and services available. Essentially many organisers felt that CVBs had complicated their offer and seemingly moved away from selling the destination as part of the tourism industry and become too entwined with the role of economic development, but not sufficiently expert at that to assist. Event organisers stated that they needed services to help them effectively and efficiently deliver an event, not create a new branch of the company, and whilst that may be a goal of the company, it is not part of the event remit.

Social legacy is important

The issue of event legacy was also raised with the corporate organisers. Some who may organise very large city-wide events felt that an event legacy was actually a natural part of their social goals as a company. It might not be directly attributable to the conference but a valuable benefit, nevertheless. But there was concern at destinations trying to exaggerate the legacy value for their own justification and corporate brands can be very protective of how their names are used. As risk conference organisers are striving to create economical value from their events, it could be argued that legacy gain for the destination itself could be value that the organiser themselves would want reciprocated as they feel they have generated it.

Many in-house event organisers identified with the issue of relevancy and that this has already been a deciding factor in their choice of destination. This may be because the company has a regional office, or manufacturing plant based there, or that local legislation favours the launch of a product in that destination. One organiser commented that most of their events in the financial sector went to the same handful of European financial capitals.



“Depending on the topic we will use certain cities for certain events. This way we know we will get the correct traction be it from customers or employees, the right level of media coverage, and wider industry interest. If we chose a remote destination, whilst it might appeal on several personal levels as well as make us seem innovative, the reality is the short-term high would be confounded quickly by the lack of return on our event goals. But then we also organise internal events where we do have more freedom to choose where to go, particularly for C-suite retreats. It really does matter what the purpose of the event is. And yes, we aren't asked that question enough by suppliers. It would save them time if they did.”

Intermediary v Direct – and what they want

In-house event organisers stated that they direct their event agencies and instruct them as to which cities to use for an event maybe they would offer two options to them but that those decisions had already been reached by the company before engaging a venue finder or event management agency. Most event agencies agreed that they also have little impact in the decision of which destination their client would be using and that for the significant majority of enquiries, they were given one, perhaps two city choices for the event to be located in. There was an exception in the automobile sector where specialist agencies argued that they had more carte blanche in destination choice albeit restricted by accessibility, venues and for them the weather and day-light hours.

Event planners felt that CVB's could play an important part in creating better destination information for delegates, especially for public transport and entertainment. All organisers felt that event apps or even company intranet apps would be used increasingly during events. This drive is partly sustainable – less paper production – but also creates easier communication to delegates. Essentially, any way that information could be used from a destination to enhance the delegate experience would be welcome. Event agencies felt that too many CVB websites are out of date or don't contain the correct content. They are mainly using them for venue find and contact details. They also said that too often the websites have information about a hotel's total number of bedrooms, but not the more useful information of how many delegates they would take on a group booking.

Incentives

In this part we have tried to identify the influences of the trends on three audiences, the corporate organiser, the event agency and the actual attendee.

Summary

Incentive travel is perhaps an outlier to the other section of the MICE industry and closer to the leisure travel industry. As a motivational tool incentive travel has continued to play an important role and a number of destinations have continued success from this sector. A number of hotel chains are revisiting their interest in the sector as they recognise the value that they can control their inventory with one group rather than via city wide events. The sector has also become less reliant on resort style destinations with significant incentives taking place in city destinations. Whilst hotel chains are exploring the sector, it does seem a number of destinations haven't considered the sector perhaps leaving it to hotels and DMC providers to concentrate on.

The structure of incentive travel programmes have remained largely similar and certainly the pandemic has had minimal impact on the structure. That said attendees are seeking that structure to have more relevant and authentic content for them, and organisers are needing to consider very carefully issues of accessibility, the need for all delegates to feel welcome and make ethical choices on behalf of their attendees.

Incentives are overlooked

Incentives are not as constrained as other event sectors and can potentially go anywhere. Accessibility though and cost still were important with organisers stating that whilst incentives are there to reward their highest performing staff it still meant time away from the office as well as from home, and therefore efficiency was still key. Many organisers agreed that the appeal of the destination was hugely motivational but that CVB's sometimes focused too much on the business purpose of their destination than the fun purpose. Incentives, whilst business events, are more aligned to the leisure tourists' demands.



“Nothing annoys me more than being shown hotels we would never use for incentives, just because it is the biggest one in the city. Or convention centres. Or wedding venues. Incentives are very specific. Every delegate has to be treated equally; the hotel should be very specific in what they are offering. And when we do fam trips it would be better to know what sort of trip we are going on, an incentive focused one or meetings. It shouldn't be both.”



“Some European destinations are quite poor handling incentive enquiries. There seems a lack of knowledge of the sector compared with other parts of the world. It is a missed opportunity as short break incentives have been on the rise for some years and have only increased post pandemic, and it means we are forced to use DMCs to get destination information and tourist boards miss out.”

Most attendees of incentives surveyed stated that the destination appeal was important to them although many stated that they do not actually have any say in the destination, and it is more of an opportunity to interact with senior management of the company that is the motivation.



“Sometimes the programme has an amazing experience, but instead the delegates prefer to spend time with the boss. It's a realisation that incentives are not all about the travel experience but the opportunity and experience for the incentive winner to further their career.”

INCENTIVES

Significance of trends

An overlooked but high value part of the industry. A number of hotel chains are revisiting their interest in the sector as they recognise the value that they can control their inventory with one group rather than via city wide events.



hotels control

Hotels concerned over the risk of city-wide conventions cancelling and then having excess rooms to sell like incentives where they remain in control



luxury authenticity

Incentives are won, so luxury experiences are sought, however these need to be balanced with a desire for authenticity



embrace agencies

Third party incentive houses and performance improvement agencies use aspiration to inspire incentive winners. The destination choice is wholly central to that aspiration



be specific

Marketing to the incentive sector should be specific and relevant, not about wedding or conferences, but purely around an incentive experience



7% but overlooked

The Events Industry Council estimates the incentive sector to be worth 7% of overall business events and possibly the most discretionary

Destinations need to offer authenticity

Naturally, what appeals to one human may not appeal to another so whilst some prefer a city experience to a resort experience what was more interesting was how much preference in favour of having their own free time so they could explore by themselves was. And whilst getting an understanding of the destination and a diverse culture was highly motivational, organised immersive cultural group experiences aren't quite as popular as many felt they aren't that authentic.



“Sometimes you feel that you have just been sandwiched into what is normally provided for leisure tourists. It might be the question asked by the guide, or that they are trying to sell other activities to you, so whilst it might be authentic, it's not the VIP experience we are craving.....we only use DMCs that specialise in business events. If they do leisure groups, we stay clear, even if they claim they are high end. It is a totally different expectation, and the (different) language is irksome. Our incentive winners want a VIP experience, not constantly being sold the 'green screen' photograph.”

A significant number would prefer not to have group activities but be more freestyle and be responsible for their own agendas during the day as they felt these would be more authentic, but to have access to activities that they couldn't readily create on their own.

Sustainability is important

The organisers and event agencies stressed the importance of sustainability within the incentive programme, as did attendees, though attendees are not so concerned about CSR projects. This is potentially due to the lack of relevance for the organisation in many incentive destinations as they may not have offices or infrastructure there, and potentially being accused of social washing.

Of critical importance was the ability to get authentic activities and cuisine into the programme, whether organised as a group or taken by individuals. Incentive winners are understandably proud of their achievement and want to share so the importance of ethical choices for activities and destination was paramount, but this was also factored by a desire for memorable experiences.

Technology doesn't appear to play a huge part in the actual incentive, however organisers stated that having bespoke short form video to promote the destination as part of the motivational aspect is key. Some organisers did state that as the blending of structure and freestyle for incentives grows, they will use event apps more routinely to ensure delegates are given more information and notifications.

Role of intermediaries in incentives

Organisers of incentives accepted that in this sector their agencies are given more freedom to suggest destinations as the issue of relevancy for the business is less needed. Essentially the incentive is needed to reward and therefore destination appeal was of more importance than corporate relevancy. Event agencies that organise incentives stated that they tended to favour destinations where connecting flights were not required – simply because of the time lost from the programme caused by a missed connection. Many event agencies accepted that they were often in a competitive bid with other agencies for incentive programmes so do like to put forward a different option to stand out from their competitors.

Trade fairs are a significant proportion of the business events sector. Many destinations and suppliers have potentially misidentified many visitors to their destination as business travellers rather than those travelling to a trade fair. It is likely that it has taken the pandemic to make more suppliers in the sector aware of the true reasons for individual's travel to their city and trade fairs may achieve more recognition for their value.

In this section we aim to establish the different trends between organisers, and both exhibiting and visiting attendees, and if the model has changed from market hub to a knowledge hub, and what role there is for a destination to play in this.

Summary

Essentially trade fairs already offer both a market hub and a knowledge hub. Education and other knowledge sharing are an important part of trade fairs, and destinations can play an important part in that, however exhibitions financial model is based around the selling of exhibition space and creating a market. Exhibitors and sponsors need to feel they are getting financial value so the market aspect will remain key to the success of the sector. Organisers are making more sustainable choices, reflecting that their exhibitors and attendees are also making those choices.

The trade fair/exhibition sector is forecast to remain strong with annual growth in excess of 5%. Even the more traditional format of the exhibition, predicted by some of the meta-analysis to have no chance of survival, is returning with a vengeance, as the world realises that digital events simply don't scratch our itch for human interaction. Exhibitions, and events in general, are time-restricted happenings, rare congregations of disparate entities that occur only a few times a year. As such, to make the most of these unions, attendees must opt for the easiest, smoothest, most direct means of interaction. And that is still undeniably live. Much of this growth will be through economic saving through the better use of technology. As the sector continues to develop, we expect to see single platforms managing all aspects of an exhibition, and event organisers looking at how to leverage the power of tech and data in order to generate more revenue.



Content remains king

Organisers agreed that attendees will view events with a more discerning eye and expect them to provide value to their professional lives. For event marketers, this means prioritising the purpose of an event and the quality of its content, as well as finding ways to provide content on an ongoing basis, not just during the show.

Trade fairs are commercial

Organisers stated that their aims were quite clear. They organise shows for economic gain and if they can increase their profit by choosing one location over another, then it is likely they will. They focus on how they can drive volume of the correct visitors to a particular event to increase exhibitor and sponsor revenue from that event.

The event itself is more important than where it is

Whilst they will factor in destination appeal, they will do so only with regards to will the destination help or hinder to attract sufficient numbers. Appeal can be logistical - a destination has the right exhibition space, but insufficient hotel stock - or political if the perception of the destination is negative due to government actions. And there are destinations that just don't appeal as they aren't seen to offer enough attractions for visit delegates. Therefore, accessibility and cost, and to some extent brand alignment, are important factors if they impact the ability of visitors to attend.



“If all things were equal then yes sure, the destination appeal would matter, but these are trade fairs. The clue is in the name. They are about trade. We go because there is business potential, not because it is in a nice city”.



“There are certain cities which attract more attendees. This is because they are hubs of business, they have larger populations. Ideally, we'd always try to launch an event in one of those cities, it's a question of getting the space”.

TRADE FAIRS

Significance of trends

Many destinations and suppliers have potentially misidentified many visitors to their destination as business travellers rather than those travelling to a trade fair and trade fairs may achieve more recognition for their value



commercial

Exhibitions financial model is based around the selling of exhibition space and creating a market. Exhibitors and sponsors need to feel they are getting financial value so the market aspect will remain key to the success of the sector



growth sector

The trade fair/exhibition sector is forecast to remain strong with annual growth in excess of 5%. Even the more traditional format of the exhibition, predicted by some of the meta-analysis to have no chance of survival, is returning with a vengeance



year round

Organisers keen to make year round communities rather than focus on the few days of the event



content & connection

Focus will remain on creating content and connection for attendees and exhibitors



location

Whilst they will factor in destination appeal, they will do so only with regards to will the destination help or hinder to attract sufficient numbers

Exhibitors stated that the ability for exhibitors to connect with visitors and the event containing the right content to drive that high volume of visitors were their overriding factors of success. Cost is also important but ultimately visitor numbers and relevance of those visitors creates the argument for their return on investment. The appeal of the destination for the show location is minimal if the visitor numbers and quality do not make the investment worthwhile. Sponsorship value is only relevant if the participants are there. However, it is not just about volume and some organisers are shifting their focus, prioritising quality of attendees and exhibitors over quantity and the really bold are attracting fewer, higher-quality visitors and accept that destination appeal therefore might be a little higher on the agenda for all.

Attendees also stated that the appeal of the destination was of minimal impact – accessibility, cost, the ability to connect and the educational content of the trade fair were more relevant for them than the destination itself.

Organisers admit that attendees also comment that the exhibitor mix is also incredibly important. Attendees report higher satisfaction to them when they attend trade shows that introduce new suppliers and products. The most nimble, disruptive exhibitors tend to be smaller, newer organisations, with smaller marketing budgets. There were opinions shared that the destination could play a part in the decision of a visitor to attend if there were other business reasons in that destination – this would point to overall relevance of the event itself which would have already been a key driver in the choice of location.



“If a destination helps with the content education of an exhibition, yes, we would welcome that engagement. It needs to be relevant but if there is some horizontal benefit to us and to the destination then we would encourage that. We sometimes struggle to find new speakers and stop the speakers selling their services, nobody wants to really hear that, so if the destination can help there, yes, we would be keen. Same as with promoting the event to local businesses and population.”

With regards to technology at events, organisers again stated that if the infrastructure of the venue was poor it would impact on their ability to maximise revenue from exhibitors and sponsors as they use technology throughout their events



“The MICE industry’s own shows are quite old fashioned. We don’t see heat mapping, or any clever use of tech. The Apps don’t seem that helpful, certainly not helping get visitors around the exhibition. We aren’t seeing any gamification to drive engagement traffic, nor clever use of social events to drive networking. It is a very different story at other sector trade shows.”

Sustainability is important

Trade Fair organisers are very aware of the environmental sustainability of their events and organisers have taken steps to improve this albeit through an industry that produces a lot of waste. Destinations and venues with environmental sustainability practices would by and large be favoured by organisers as it is likely they can mitigate costs by already having the correct recycling and other waste handling systems and measurement in place.

Social sustainability though is an often-overlooked aspect of sustainability, as sustainable development discussions often focus on the environmental aspects of sustainability. All three dimensions of sustainability, (environmental, economic and social) must be addressed to attain the most sustainable outcome possible and trade fair organisers are acutely aware of the social sustainability impact of their events and the significance of their relationship with the host destination community, no doubt due to a large proportion of their visitor audience being based there.

Trade fair organisers therefore have policies in place for their own organisations and will seek suppliers that show that they too can demonstrate how they measure their social sustainability impact which can include human rights, fair labour practices, health, safety, diversity, equity and community engagement.



Section Three

A Danish Context To The Trends

Introduction

The purpose of this section is to establish if there is any evidence to suggest that the domestic meetings market in Denmark is impacted in a different manner by the trends that have been identified in section one and if those trends from that meta-analysis are peculiar to the international meetings industry or have different relevance with the domestic Danish market.

Previous sections have concentrated on a non-Danish audience and how the trends impact them with outbound events in mind whereas this section concentrates on events being organised domestically.

We conducted telephone interviews with a small number of Danish based event organisers, the data supplied by both MeetDenmark and MMGY Hills Balfour, and also conducted an online survey with data from MMGY Hills Balfour. The 17 organisers were asked to what extent they agreed or disagreed with the trends presented and then their interpretation discussed.

Whilst the remainder of this report is not attempting to rank the importance of the trends, we did ask this Danish based audience to put some emphasis to the importance of each of the trends when it comes to organising domestic events. Unlike other evidence gathered it was evident to those interviewed who the report is being produced for and the intended audience.



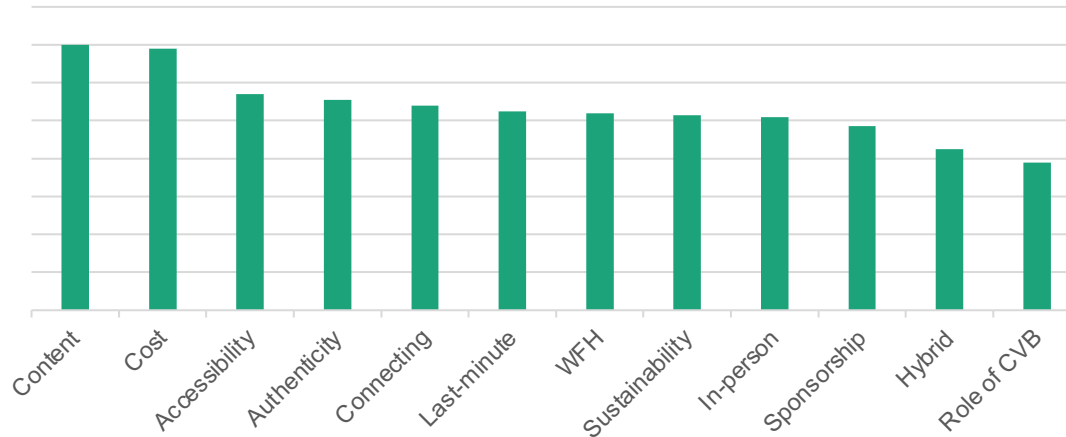


Executive Summary

Section Five



We asked this audience to rank the trends in terms of the impact on how they organise their own events and to consider (i) how delegates may view attending the events they organise and (ii) how they perceive events they or their colleagues may attend.



Little difference to international needs

We also asked this audience if there are other trends that they believed impact on them specifically in the context of being based in Denmark but overall the response was that the trends identified in the meta-analysis are consistent with their event organisation and that there was no difference when an international audience is compared with a Danish audience. Many of the trends were ranked as important but only content and cost scoring markedly higher as the more important influences for domestic event organisers and nearly all of those interviewed stated that the content would dictate if they would attend or not with a very pragmatic approach to their participation, and that budget was of critical importance.

Sustainability plays a major part in Danish companies' values and many of those interviewed felt social sustainability was equally important as environmental sustainability. There was a general support that environmental sustainability at events is something that the venue or hotel supplier can offer to assist with, but that as social sustainability is more difficult to package up the organisers did say it would be of great benefit to them if suppliers could find a way to promote social solutions as well as environmental ones.

Unfortunately for suppliers the issue of short-term bookings changing is unlikely. Again, those interviewed stated that work nature of the manner we work now is far more last minute and due to event technology it is easier to organise events with shorter notice. It was agreed that this can lead to suppliers increasing their prices to mitigate risk, but organisers felt this was a necessary consequence if they book events at shorter notice.

As the audience in this section is predominantly concerned with domestic events, we also challenged the interviewees to consider themselves as not the organiser but also as a potential attendee. Initial remarks were centred around time and travel and therefore the need for easily accessible locations and venues. We then encouraged interviewees to think about the broader subject of accessibility rather than just in travel terms and many agreed that it is the organisers' role to make delegates as welcome as possible, be that their choice of destination or venue for a particular event. It was suggested that it is difficult to find a perfect solution to please all the target audience but that greater consideration to the welcome and security a delegate feels in a specific destination is important.

Whilst not completely relevant to all those surveyed, we discussed the issue of sponsorship not just in terms of investing in sponsorship but also in receiving investment. Organisers were in broad agreement that demonstrating the value to participants is very important and forms part of the measurement criteria for many of them. They also commented that sponsorship value needs to be tangible and is about results rather than brand visibility. There was some discussion about the cross over between sponsorship as advertising, but there was consensus that event sponsorship has to drive some measurable benefit and be attributable to the event itself. There was also agreement that as events become increasingly digitalised through event apps that there are increasing opportunities for sponsors to connect with attendees. Organisers see this as both a risk to their existing revenue streams but also an opportunity to create additional revenue if they can manage that connection.

There was unlikely to be any disagreement as to whether delegates want authentic experiences or would prefer something fake, therefore, the interviewees were pressed on what they felt made an experience authentic. The collective response was the ability to behave like a local and to experience the destination through that viewpoint rather than just as a tourist. There was an obvious pride for the Danish product with the interviewees and they demonstrated a wish to involve local cuisine and culture in their events when practical. One different viewpoint was a comment around the structure of the meeting itself, and that when they organise events within Denmark with foreign attendees that they deliberately highlight Danish business practices. Organisers were all very proud of the Danish heritage around them and wanted to use that especially if overseas visitors were attending events. Interestingly they were very confident that the experiences available are authentic as what they use for their events is also what they use in their private lives. The notion of *Fælleskab* was mentioned as a sense of bringing a business community together to share something authentic.

The final trend from the meta-analysis report of what the purpose of a convention bureau has become offered some debate as to whether the role should concentrate as a destination promotion or destination management role, though most understood the role of a CVB was to bring business to the city and then allow the private sector to manage.



“We are part of a multi-national company with offices in different countries and different cultures within those office locations. When we host the meetings in Denmark, we are very keen to manage the event in a Danish way. Our business culture is different to others, and we should be proud of that. An authentic experience shouldn't just be about what you eat or drink, but the entire event experience.”



“Value has two different issues though very much connected. For our own events yes we are very keen to make sure there is value to us as the company, so we keep a careful eye on cost. For when we pay to attend events organised be it by associations or professional organisers then we want to see value, so we don't want to see them cutting costs. Yes, this can be viewed as hypocritical but goes to your point about self-interest.”



“I feel that the hybrid part is really just a recording. Delegates joining a live event virtually just won't get the same experience as those there in person. We do record certain presentations from our events so that colleagues and customers not present can then catch up with relevant communication. We have discussed perhaps parts of our events being edited into more professional looking podcast type communications to our employees.”



“There is little point in getting teams together to just talk to them. The event is an opportunity for senior leadership to engage them in the direction of the company. We did do this before Covid, but it was often part of the secondary agenda, now it is part of the primary agenda of the event.”



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