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THE IMPACTS OF THE PANDEMIC ON CONVENTION BUREAUS IN EUROPE

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Introduction

No-one in our industry needs to be reminded that the health and economic crises that had their origins in late 2019 have had a devastating impact on business events worldwide. As an industry inextricably linked with the travel and hospitality sectors and bringing together, usually indoors and in close proximity, large numbers of people, we have seen an extreme transformation of the market in which we operate – a transformation which was unimaginable to any of us in pre-pandemic times.

None of our business events colleagues, in any country, has been left untouched by the effects of the pandemic on their professional lives. PCOs, DMCs, venue managers, incentive agencies, conference interpreters, audio-visual companies and many other suppliers have seen the regular markets for their facilities and services evaporate - all but completely, in many cases.

Convention bureaus have operated as key stakeholders in our industry for over a century, assuming the major responsibility for marketing their cities, regions and countries as destinations for the hosting of business events, from small corporate gatherings to the vast annual conferences of international associations. During that time, it has been clearly demonstrated that an effective and well-resourced convention bureau is essential to the success of any destination that wishes to establish itself as a meeting place and to benefit from the rich economic, cultural and intellectual benefits that usually accompany such events.

This report focuses on how convention bureaus have experienced the impacts of the pandemic and how they are adapting to the profound changes that the crisis has provoked in how people communicate and collaborate for professional and business-related purposes. It specifically concentrates on convention bureaus in the continent of Europe, which remains the world-region with the largest share of the international association meetings market, as well as attracting more participants to international meetings and conferences than any other region. But our destinations also attract countless numbers of local, regional and national meetings, and this market too has been deeply disrupted since Covid first arrived in every country of Europe.

Acknowledgements

Many of the men and women who responded to my survey have been my friends and colleagues for a number of years. I have had the pleasure of working with several of them, on projects linked to destination marketing, from creating ambassador programmes to training their local venue managers in sales and marketing techniques. In the past 20 years, I have also had the privilege of speaking at many of the conferences organised by convention bureaus for their members and partners.

This research project would not have been possible without the kind participation of convention bureau managers from across the entire continent of Europe, from the island nation of Iceland in the west to the Ural region in the east. I am grateful to every one of the people who gave me some of their precious time to respond to the questionnaire that forms the basis of my research.

A special thank you is due to Aileen Crawford, Head of Conventions at the Glasgow Convention Bureau, for her valuable support and encouragement in the early stages of this project.

I believe that everyone reading this report will find something of value in it, and some reasons to support our hopes for the beginnings of a recovery and a better future.

Dr Rob Davidson
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134 convention bureaus from 33 European countries participated in the survey in early 2021

Changes in convention bureaus' staff levels in the first 12 months of the pandemic.

Most had no changes. But overall, there were net reductions in staff numbers:



Many of these reductions may not be permanent, as they include staff who have been redeployed into other types of work, as well as people who have been moved from full-time to part-time contracts or on temporary leave of absence from work.

Changes in convention bureaus' funding levels in the first 12 months of the pandemic.

1 in 3 convention bureaus experienced reductions in their government / public funding

1 in 6 convention bureaus saw increases in their government funding

75% of convention bureaus receiving financial support from their partners/ members experienced reductions in funding from those sources.

Changes in convention bureaus' activities in the first 12 months of the pandemic.

Bidding for conferences.

For most of the convention bureaus, this activity continued as usual, but over 20 of them stopped or significantly reduced their bidding.

Branding/positioning.

Continued as before, but with more use of digital tools.

Executive summary

Websites.

Significant investment of time in redesigning and updating websites, especially with Covid-related information and details of opportunities for hybrid events in the destinations.

Advertising.

More use of digital forms of advertising. But 20% of the convention bureaus suspended or greatly reduced this activity.

Social media.

Significant increases in the use of the social media for staying in touch with stakeholders. LinkedIn was by far the channel most used for this purpose.

Fam trips and site visits.

30% of the convention bureaus suspended all of these trips, and over 20% replaced them with virtual fam trips.

Exhibitions.

Most of the major exhibitions for our industry took place in virtual forms. 45% of the convention bureaus participated in one or more of these.

Ambassador programmes.

Most continued as before, but events such as award ceremonies went ahead in digital forms. Several new ambassador programmes were launched or planned.

Market research.

More investment in this activity, but for many convention bureaus there was a change of focus from researching international conferences to investigating 'proximity' markets.

Advocacy.

Generally increased, with a greater focus on lobbying governments for financial relief support.

Services for meeting planners.

More guidance for convention bureaus' clients and potential clients – particularly on facilities and services for hybrid meetings, and updates on health and safety measures in operation in the destinations.

Executive summary

Future changes anticipated by the convention bureaus

In the short term.

Many convention bureaus expressed great uncertainty over the immediate future of our industry and their role in it. The two most important unknowns were the effectiveness of the vaccination programmes and people's general ability and willingness to travel.

The main changes anticipated for the short term:

- More use of all digital marketing tools
- More preparation for hybrid and other digitalised forms of meetings
- More need to support stakeholders with information on changes in the destinations
- More focus on local and national markets, instead of international events.

In the long term.

The convention bureaus' predictions for how our industry will function in a post-pandemic world indicated a widespread conviction that many of the trends already identified in this survey would continue and intensify.

The main changes anticipated for the long term:

- More hybridisation of meetings and events. 70% of respondents expressed their belief that hybrid and other digitalised forms of meetings were here to stay.
- Shorter meetings, with fewer in-person participants. More multi-hub events, splitting up large international conferences to a number of regional hubs.
- More attention paid to wellness, sustainability and the social legacy of meetings. Health, safety and hygiene conditions in destinations will be of paramount importance.
- More value will be expected from in-person attendance in meetings: better networking opportunities, more authenticity, less superficiality.



Executive summary Convention bureaus' sentiments regarding their future



76% of respondents were optimistic or very optimistic about their future



24% of respondents were neutral or quite pessimistic about their future

Their means reasons for feeling this way were:

The immutable need of humans to meet others for live experiences

Their excitement about the new opportunities presented by hybrid events

Confidence that their destinations will be attractive to meeting planners in a post-pandemic world

Our industry's resilience and ability to adapt to new circumstances.

General uncertainty about the future and the longer-term impacts of the pandemic

The length of time we may have to wait before the recovery begins in earnest

The impacts of the loss of income that partners and members will experience as more face-to-face meetings are replaced by virtual events.

Conclusion

The general picture to emerge from this survey is one of European convention bureaus working hard to support their destinations by innovating and adapting to the immense challenges now facing them. Many are doing so with fewer resources, whether staffing or funding, and in the face of continuing uncertainty about the duration of the pandemic.

Some convention bureaus have suspended one or more of their marketing activities, but most have continued, many in digitalised forms, from virtual fam trips and digital awards ceremonies for ambassadors, to participation in online exhibitions. Many destination marketing organisations have used the past year to focus on making improvements to their services, resulting, for example, in better websites, bid books, and use of the social media. Many have also increased their education and training activities, improving their own skills as well as those of their stakeholders.

In terms of their predictions for the future, there is widespread expectation that the digitalisation of meetings will continue into the post-pandemic world; there will be more focus on local and national markets; health, hygiene and safety of destinations will be paramount; sustainability, wellness and the social legacy of meetings will become more relevant; and in-person meetings will be generally smaller and shorter but will have to offer participants more genuine value.

In April 2021, the majority of convention bureaus feel quite optimistic or very optimistic about the future, counting on the enduring and intrinsic need of human beings to meet face-to-face for the exchange of knowledge, networking, and live experiences. When recovery comes, European convention bureaus will be ready and willing to play their part in restoring prosperity, travel and animation in their destinations.

Methodology and sample

Between 19 February and 30 March 2021, invitations were sent to 219 conventions bureaus in European countries, requesting permission to send them a link to the online questionnaire that was the research tool for this survey. Of the 146 convention bureaus who agreed to receive the link, 134 of them successfully completed the questionnaire. These were a combination of national, regional, and local convention bureaus, although the majority were responsible for marketing individual towns and cities as destinations for business events.

Your convention bureau represents:

Response	Count	Percent
A city or town	82	61.19%
A region (Regional Convention Bureau)	28	20.90%
A country (National Convention Bureau)	23	17.16%
Other*	1	0.75%
Total	134	100%

* A district

In terms of their geographical location, the 134 convention bureaus were located in 33 European countries. The 3 most represented nations were the United Kingdom, Sweden and Germany, who between them accounted for almost 25% of the entire sample. A complete list of all participating convention bureaus is given in Appendix 1 of this report.

Responses by country:

Austria 5	Lithuania 1
Belgium 6	Luxembourg 1
Croatia 4	Malta 1
Czech Republic 2	Montenegro 1
Denmark 2	Netherlands 5
Estonia 3	Norway 3
Faroe Islands 2	Poland 9
Finland 7	Portugal 3
France 6	Russian Federation 2
Germany 10	Serbia 1
Greece 2	Slovenia 1
Hungary 1	Spain 8
Iceland 1	Sweden 11
Ireland 2	Switzerland 8
Israel 2	Ukraine 2
Italy 8	United Kingdom 12
Latvia 2	TOTAL 134

Changes in convention bureaus' staff numbers

This section of the survey compared the numbers of people working in the convention bureaus one year ago with the numbers of staff working there now, beginning with full-time staff and followed by part-time staff.

Full-time staff

How many people work FULL-TIME for your convention bureau ?

Number of full-time staff	Number of convention bureaus with this number of FT staff in February / March 2020	Number of convention bureaus with this number of FT staff in February / March 2021
1	22	27
2	25	25
3	24	30
4	19	13
5	5	7
6	6	3
7	8	6
8	7	3
9	4	5
10	0	1
11	1	0
12	2	1
13	1	0
14	1	2
15	2	2
16	1	1
17	1	1
18	0	0
19	1	0
20	0	0

573 people were working full-time in these convention bureaus in February / March 2020. 90 of these organisations had 4 or fewer full-time members of staff. Only 10 convention bureaus had more than 10 full-time staff members. These more generously staffed organisations included 3 national convention bureaus and 4 Western European capital cities. 7 out of the 10 convention bureaus with the largest numbers of staff were located in three countries - Belgium, Germany, and the United Kingdom.

By March 2021, **496** people were working full-time in the convention bureaus in the sample - a reduction of 77 members of staff. Accordingly, the number of convention bureaus with 4 or fewer full-time staff members rose from 90 to 95, or almost 75% of the sample. 8 convention bureaus still had 10 or more full-time members of staff in February / March 2021, but 4 of these had lost members of staff in the previous 12 months.

In general, a large majority of the convention bureaus experienced no change in their full-time staff numbers, as shown below. Indeed, 6 convention bureaus managed to increase their staff numbers in the 12-month period. Nevertheless, altogether **34** convention bureaus had fewer full-time staff members in February / March 2021, compared with one year previously.

Changes in convention bureaus' staff numbers

Changes in full-time staff numbers between February / March 2020 and February / March 2021.

Full-time staff members

No change	92 convention bureaus
Increase	6 convention bureaus
Decrease	34 convention bureaus
TOTAL	132 convention bureaus

Most of the losses in full-time staff were small. 20 convention bureaus in the sample lost 1 member of full-time staff; 5 lost 2 people, and 3 convention bureaus lost 3. However, 6 convention bureaus lost 4 or more members of their full-time staff in that period. Increases in full-time staff members were generally more modest, with 3 convention bureaus gaining 1 new staff member, 2 convention bureaus gaining 2, and 1 gaining 3 new members of full-time staff.

Part-time staff

Numbers of part-time staff were generally smaller than numbers of full-time staff. Only **69** of the convention bureaus in the sample employed any part-time staff, and the vast majority of those employed only 3 or fewer. Gains and losses of part-time staff were accordingly measured in small numbers, with the most commonly reported number for members of part-time staff gained or lost being 1.

130 people were working part-time in these convention bureaus in February / March 2020. By March 2021, **106** people were working part-time in the convention bureaus in the sample - a reduction of 24 members of staff.

Changes in part-time staff numbers between February / March 2020 and February / March 2021

Part-time staff members

No change	43 convention bureaus
Increase	10 convention bureaus
Decrease	16 convention bureaus
TOTAL	69 convention bureaus

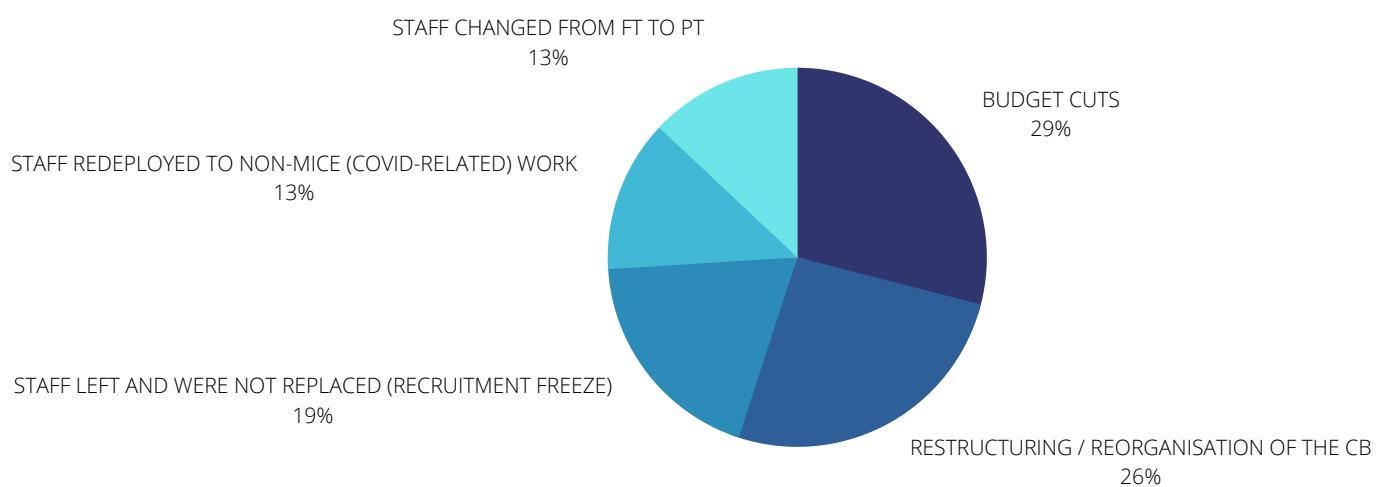
Of the 10 convention bureaus reporting an increase in part-time staff members, 6 indicated that these gains came as a result of full-time staff becoming part-time.

Changes in convention bureaus' staff numbers

Reasons for changes in staff levels

Full-time

Reasons for reductions in staff levels



Of the convention bureaus that gave a reason for reductions in their staff numbers, 29% simply stated that these cuts were a result of a reduction in their budgets, linked to the pandemic. This, together with restructuring or reorganisation of the convention bureau (26%) were the two principal reasons given for losing staff. In another indication of reduced staffing resources for the convention bureaus, 19% of the sample reported that staff who had left, for retirement and other reasons, had not been replaced, due to a freeze in recruitment for their organisations.

Interestingly, 13% of the convention bureaus affected by staff cuts indicated that colleagues had been redeployed to other government departments to do critical non-MICE work directly related to the pandemic, such as advising local businesses on government support available to them during the crisis. A further 13% noted that reductions in their staff levels were due to full-time colleagues being transferred to part-time positions as a result of being placed on furlough or 'kurzarbeit' programmes, for example. Clearly, many of these cuts in staff numbers are reversible, and in the case of redeployed staff and staff placed on part-time contracts, many convention bureaus will be hopeful that these colleagues will be fully reinstated after the crisis ends.

Reasons for increases in staff levels

The convention bureaus whose staff resources had grown in the one-year period beginning February/March 2020 represented the fortunate few for whom the hiring of new staff continued as planned in pre-crisis times. A few forward-looking convention bureaus mentioned that they had been given permission to recruit new colleagues to assist in preparing for a post-pandemic recovery.

Changes in convention bureaus' funding from government sources

Government funding

The principal source of financial support for the majority of convention bureaus in the sample was public funding from governments or government agencies. Only 11 of the 134 convention bureaus reported that they had never had funding from this source.

How does your present funding from government sources compare with your funding from those sources one year ago?

Response	Count
It has increased	23
It has decreased	38
It has completely stopped	4
No change	58
We never had funding from government sources	11
TOTAL	134

Responses were mixed, with the most common being that the convention bureau's government funding had not changed. However, decreases in this form of support were reported by 38 convention bureaus in the sample, while an additional 4 indicated that it had completely stopped. In other words, almost 1 in 3 of the convention bureaus had been affected by cuts in their funding from government sources. With governments' spending and borrowing at record levels in many countries, due to the urgent need for them to provide fiscal stimulus to their economies and relief to those affected by this global disaster, it would have been surprising if the public funding of destination marketing organisations had remained untouched. The extent of the reductions experienced by those convention bureaus affected in this way is shown below.

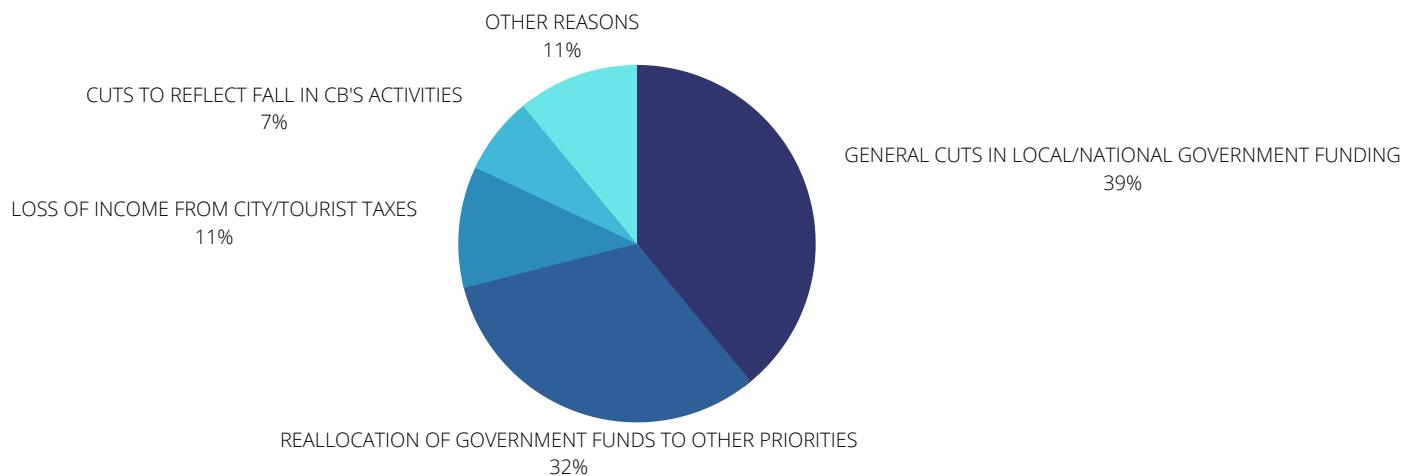
**By approximately what percentage has your funding from government sources decreased?
(36 responses)**

Reduction	Count
10%	9
20%	8
30%	7
40%	6
50%	4
60%	1
70%	0
80%	1
90%	0
100%	0
TOTAL	36

For almost half of these convention bureaus the reduction in their funding from government sources was limited to 20% or less; and only 2 in the sample had experienced cuts of over 50%. Nevertheless, any reduction in funding has immediate and usually serious consequences for the organisations in receipt of public funds, and as has already been mentioned, budget cuts were the principal reason for convention bureaus' reductions in staff numbers.

Changes in convention bureaus' funding from government sources

Reasons for reductions in government funding



Of the 28 respondents who gave reasons for their reduction or cessation in government funding, 11 (39%) reported that it was due to general cuts in government spending in their country or city. 32% specified that their loss of income from public sources was the result of government resources being reallocated to other (pandemic-related) priorities such as hospitals.

For 3 (11%) of the respondents, the loss of revenue from city taxes or tourist taxes, their principal source of public funds, was the main reason, reflecting the dramatic falls in overnight visitor numbers that have been seen worldwide. 2 convention bureaus directly linked their budget cuts to the fact that they were spending less on activities such as familiarisation trips and attendance at exhibitions. Other reasons given were a loss of income usually earned from organising official events, and a change in local politicians to a less supportive regime.

"The number of activities that we can do (trade shows, live workshops and other events) has decreased due to cancellations and postponement, so the government has decreased our budget - we cannot 'save' the money from one year to another".

Changes in convention bureaus' funding from government sources

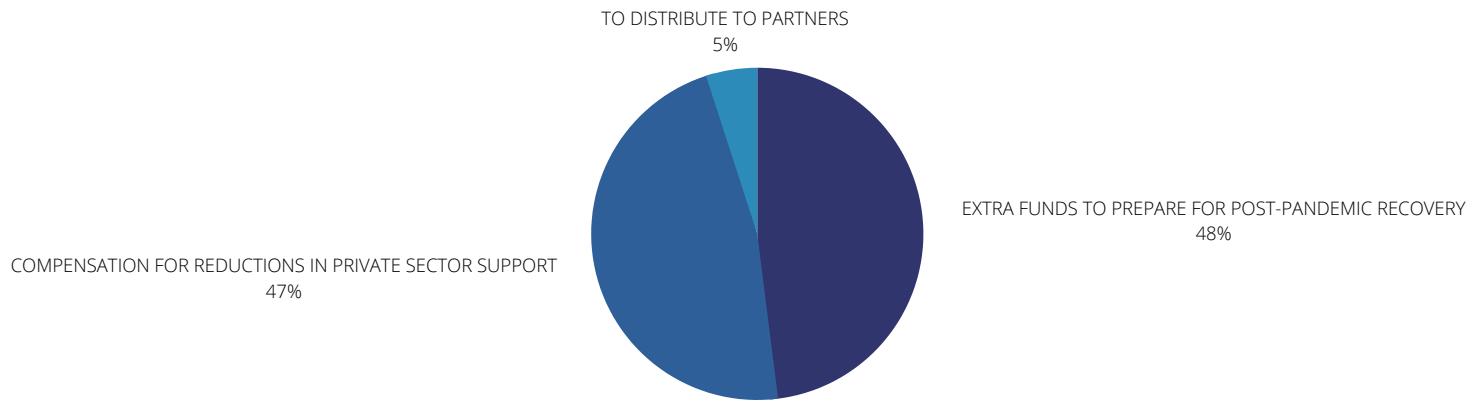
However, the trend in government funding for convention bureaus was by no means universally downward, and a number of fortunate convention bureaus in the sample, 23 out of 134, saw their funding from public sources increase between February / March 2020 and February / March 2021. The range of increases is shown below.

By approximately what percentage has your funding from government sources increased? (23 responses)

Increase	Count
10%	3
20%	2
30%	0
40%	3
50%	10
60%	2
70%	1
80%	0
90%	0
100%	0
over 100%	2
TOTAL	23

Almost half of the respondents reported that the increase in their level of support from public funds was 50%, although 5 other convention bureaus had had greater increases in that period – in 2 cases, more than a doubling in their government funding.

Reasons for increases in government funding



Changes in convention bureaus' funding from government sources

Of the 19 respondents who gave reasons for their increases in government funding, the two principal purposes were to support new programmes to prepare for the post-pandemic recovery; and to compensate for reductions in private sector funding suffered by the convention bureaus.

1 respondent specified that their municipality had increased their level of funding with the objective of the convention bureau distributing financial support to their members, for marketing and other purposes.

"Our funding from the municipality has increased due to the decrease of private funding from our industry partners who, because of the pandemic, are unable to support us. In fact, the municipality has increased our support by more than that shortfall, with the aim of increasing our possibility to host more congresses in the future".

"Our local government funding has Increased compared to the last year because the city wants to focus more on MICE tourism in the future. It wants to have a better spread in visitors throughout the year and more visitors who stay more than one night as well as during the week and in the off-peak season".



Changes in convention bureaus' funding from partners and members

Convention bureaus operate as valuable intermediaries, marketing their destinations on behalf of the suppliers of MICE-related facilities and services in their city, region or country. In most cases, annual fees paid by those suppliers to the convention bureau are used to supplement the funding of the convention bureaus' destination marketing activities. Almost 75% of convention bureaus in the sample depended partly (or more rarely, entirely) on funding from their partners or members, to support their activities.

How does your present funding from your partners/members compare with your funding from those sources one year ago? (130 responses)

Response	Count
It has increased	2
It has decreased	53
It has completely stopped	22
No change	19
We never had funding from partners/members	34
TOTAL	130

Given the severe reduction in business experienced during this period, by venues of all kinds, accommodation providers, and all the other types of suppliers that form the majority of convention bureaus' partners/members, it is unsurprising that reductions and indeed cessations in their contributions have been widespread. 22 respondents out of the 130 reported that income from these stakeholders had been reduced to zero.

For those convention bureaus whose contributions from their partners/members had decreased rather than stopped entirely, the range of cuts in funding from this source is shown below.

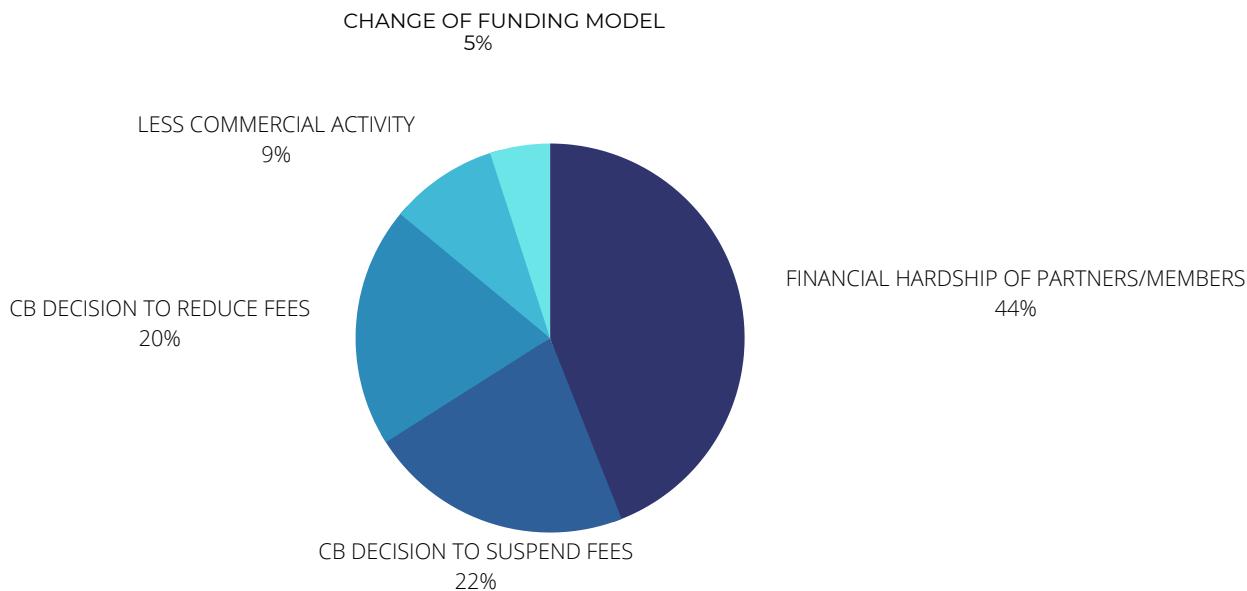
By approximately what percentage has your funding from partners/members decreased? (50 responses)

Reduction	Count
10%	8
20%	10
30%	3
40%	1
50%	14
60%	3
70%	4
80%	4
90%	3
TOTAL	50

Changes in convention bureaus' funding from partners and members

While in some cases, the reductions are relatively modest, 14 convention bureaus experienced their income from partners'/members' fees being halved in this period. And for another 14 convention bureaus, the cuts were even more severe.

Reasons for reductions in, or cessation of, funding from partners/ members



44% of the convention bureaus who gave a reason for the loss of financial support from their partners/members mentioned the financial hardship being experienced by those stakeholders. Many of these convention bureaus reported widespread closures, bankruptcies and sharp decreases in business which left their partners/members unable to pay their fees.

But there were other reasons. In almost equal measures, convention bureaus decided either to reduce or to suspend their partners'/members' fees for 2020, and in many cases, continuing into 2021. Fee reductions varied from 20% to 80%, but the size of cut most frequently mentioned was 50% - in other words, some convention bureaus were accepting half of the amounts normally payable to them by their partners/members. Fee 'freezes' were frequently mentioned by convention bureaus who offered a year's break from paying fees, with the objective of retaining their partners/members. Nevertheless, 11 convention bureaus in the sample explicitly mentioned that, despite these measures, many of these valuable stakeholders had failed to renew their memberships during the 12-month period. It may well be the case that many more convention bureaus are now facing this challenge. Over time, we will find out how many of these 'lost' partners/members will return to supporting their convention bureaus.

A further reason given for the fall in financial support of this kind was the loss of revenue caused by partners/members not paying for the commercial activities of their convention bureaus, such as social media campaigns, exhibition participation, and advertisements in local guides. Under this category comes the loss of income for convention bureaus charging commission on, for example, venue and accommodation location services. For those convention bureaus using this model of generating income, the consequences of the shortfall were significant.

Changes in convention bureaus' funding from partners and members

The final explanation for the decreases in funding from partners/members is the decision of several convention bureaus (5% in the sample) to permanently move away from a membership/partnership model and to function solely with the support of public sector contributions as a matter of policy, unrelated to the pandemic. The main reasons given for this change in funding model were the convention bureau's wish to promote all suppliers in their destination, rather than only those paying fees; and to avoid the effort and resources required to manage membership programmes.

“Considering the crisis and financial problems of our members we have decided to decrease the amount of the membership fee for 2021 in order to keep the members' base. But despite lowering the fees, about 30% of members did not renew their membership for this year”.

Two convention bureaus in the sample managed to go against the general trend by receiving more financial support from their partners/members. One saw a 10% increase in contributions, following their convention bureau's launch of a new membership and sponsoring structure which attracted a number of new members; and the other saw a 40% increase which they attributed to their partners'/members' wishes to 'support the MICE industry'.



Changes in convention bureaus' funding from other sources

While 56 convention bureaus in the sample reported that they had no funding from sources apart from government support and their partners'/members' contributions, 73 convention bureaus stated that they benefited from other sources of revenue. These included (for local/regional convention bureaus) financial support from their national convention bureaus or other destination marketing organisations; payments from other publicly funded organisations for contributions to project work; and revenue arising from a range of activities not traditionally associated with convention bureaus, such as managing a local conference centre and accepting responsibility for marketing the destination for leisure tourism, as well as for MICE.

Generally, such sources of revenue are relatively modest and unstable, even in normal times, and, as shown below, the trend in their availability from February / March 2020 until February / March 2021 was downwards.

How does your present funding from other sources compare with your funding from those sources one year ago? (129 responses)

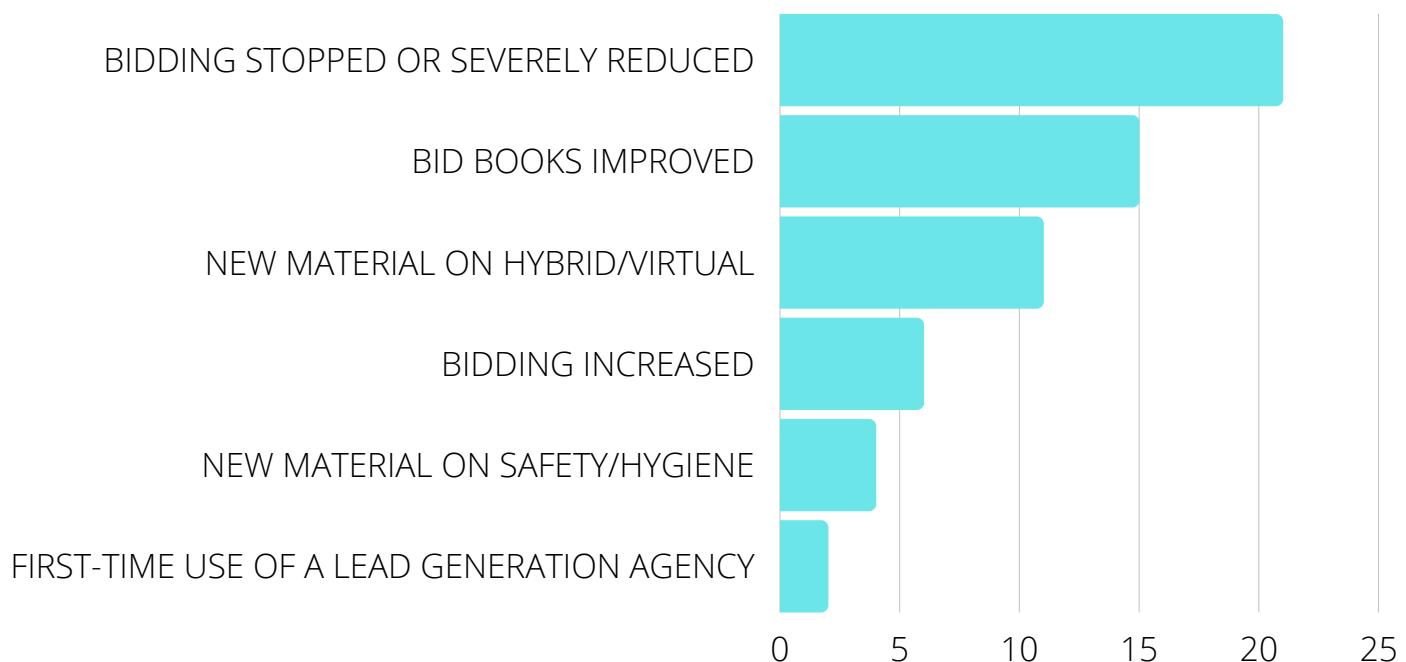
Response	Count
It has increased	7
It has decreased	20
It has completely stopped	8
No change	38
We never had funding from partners/members	56
TOTAL	129



Changes in convention bureaus' activities: Bidding

The destinations for many conferences are selected through competitive tendering procedures, in which convention bureaus play a part by taking a leading role in the bidding process, coordinating a city-wide response and compiling a detailed, customised bid document. With so many conferences being postponed and cancelled in 2020 and into 2021, what changes did convention bureaus report in their bidding activities?

Bidding for conferences - number of mentions.



It is unsurprising that the majority of conventions bureaus reported no change in their bidding activities. The long lead-times for international association conferences in particular mean that most of these organisations have continued to issue 'calls for proposals' and bid manuals for their events that are scheduled for the mid-2020s and beyond – in the expectation that these conferences will be able to take place as planned, in a post-pandemic world.

But while 6 convention bureaus actually increased their bidding activities during this period, 21 others in the sample mentioned that their bidding activities had stopped completely or had been severely reduced. The two most common explanations for this change were that, due to the pandemic, many associations had become more uncertain in their forward planning; and some were more focused on the challenge of managing their already confirmed but postponed conferences, rather than on selecting destinations for new future events.

1 convention bureau reported that it had begun bidding for the conferences of national associations rather than international associations, while the uncertainty surrounding international travel continues. 15 convention bureaus emphasised that they had taken steps to improve their bidding procedures and bid book templates to make them more functional, many mentioning that they had moved towards the digitalisation of these documents.

Changes in convention bureaus' activities: Bidding

Of the specific types of improvements mentioned, the most significant was the introduction of details of hybrid and virtual options into bid templates. 4 convention bureaus also introduced new material on Covid-related safety and hygiene measures in their bid documents, a trend that is almost certain to grow.

Clearly, for most convention bureaus, bidding continues to be a key method of winning conferences for their destinations, while associations continue to plan ahead. But the form and content of their bids are beginning to reflect the new realities of destination marketing.

“We have developed a digital format for our bids, with a microsite, videos and a virtual site visit”.

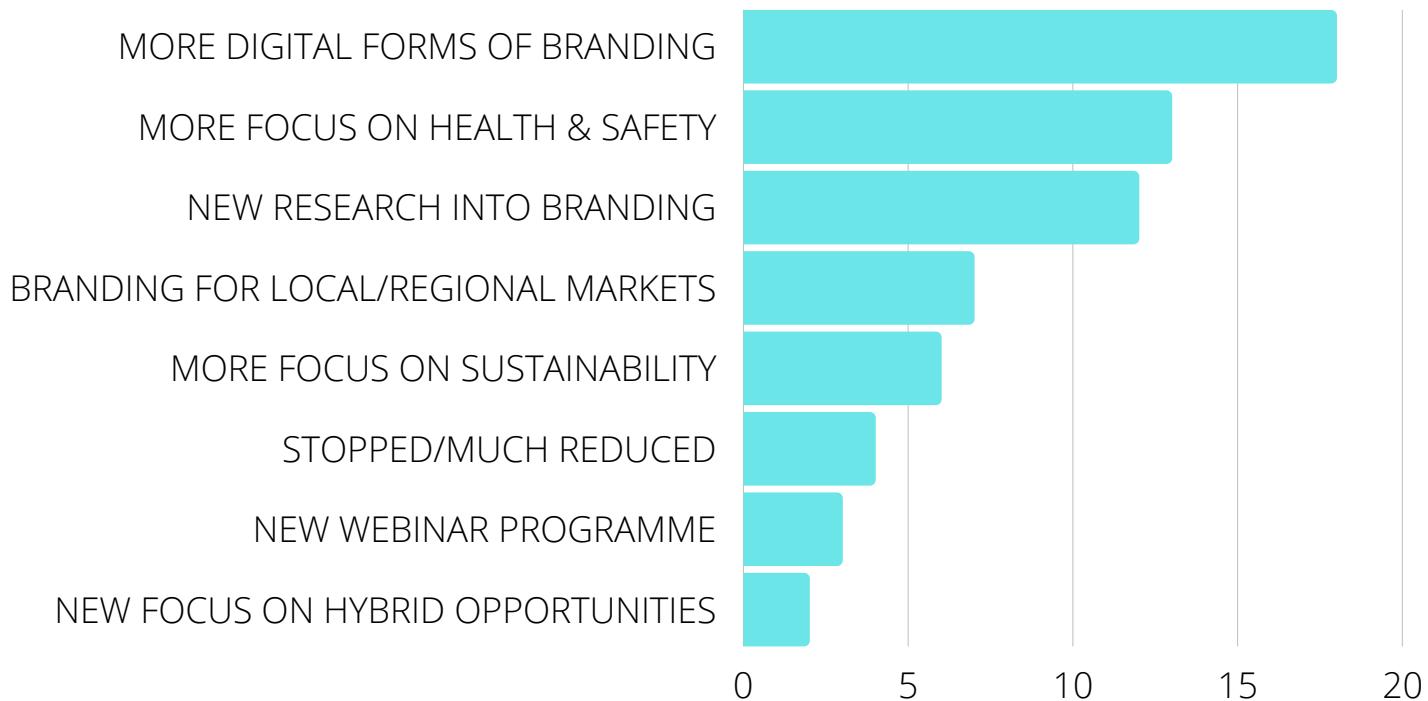
“We created a new MICE Support Programme that clearly describes what kind of support (operational and financial) we can offer when it comes to bidding for events as well as supporting confirmed events”.

“We started offering hybrid opportunities in our bids even before Covid-19 happened.
Now, we are continuing with hybrid opportunities. Sustainability and financial security are our serious focus as well”.

Changes in convention bureaus' activities: Branding and positioning

It is widely considered to be essential for convention bureaus to develop a coherent brand image for their city, region or country and to clearly position it as a viable and distinctive destination for business events. As a growing number of potential destinations for such events are entering the market, the need to develop a distinctive, memorable brand, clearly differentiating each destination from its competitors, has become even more important.

Branding and positioning - number of mentions.



From the convention bureaus reporting changes in their branding and positioning strategies, the most frequently mentioned innovation was the increased use of digital forms of branding, with more use of digital marketing materials and the social media. Several convention bureaus reported that they had created new promotional videos reflecting the changes in their branding and positioning.

Another significant change in how destinations rebranded themselves during this period is the greater focus on health and safety, in anticipation of the post-pandemic era. 13 convention bureaus mentioned that they are now increasingly emphasising their destinations' strengths in terms of these elements, focusing, for example on hygiene protocols and opportunities for outdoor meetings. 3 convention bureaus reported that they have packaged these elements into post-pandemic 'recovery campaigns', with 1 bearing the name, 'Ready When You Are'.

Changes in convention bureaus' activities: Branding and positioning

In other examples of rebranding mentioned by the respondents, 6 convention bureaus reported that they were making efforts to sharpen their cities'/countries' positioning as sustainable destinations, emphasising their green credentials as well as opportunities for conferences to leave behind a social legacy. 2 respondents, on the other hand, were attempting to incorporate their destinations' facilities for hybrid events into their branding messages. From evidence presented elsewhere in this report, it is likely that the number of convention bureaus adopting this strategy will rise in the near future.

Although 4 convention bureaus reported that they had stopped or reduced their branding and positioning activities ('until the borders reopen', in one case), 12 others had intensified their efforts in this respect, notably with more research into how their brands were perceived by their stakeholders. 3 convention bureaus created a programme of webinars aimed particularly at operators and buyers, to educate them about the branding of these destinations.

Several respondents mentioned their work in refining their destinations' brands, for example by 'investing in our brand as a scientific hub'. For 7 convention bureaus, a significant change was their change in focus from branding their destinations for the international MICE market to branding them as places for the hosting of local, regional and national business events. Several of them reported that they were targeting these 'proximity' markets for the first time, prompted by the widespread uncertainty surrounding international travel and 'Covid visas'.

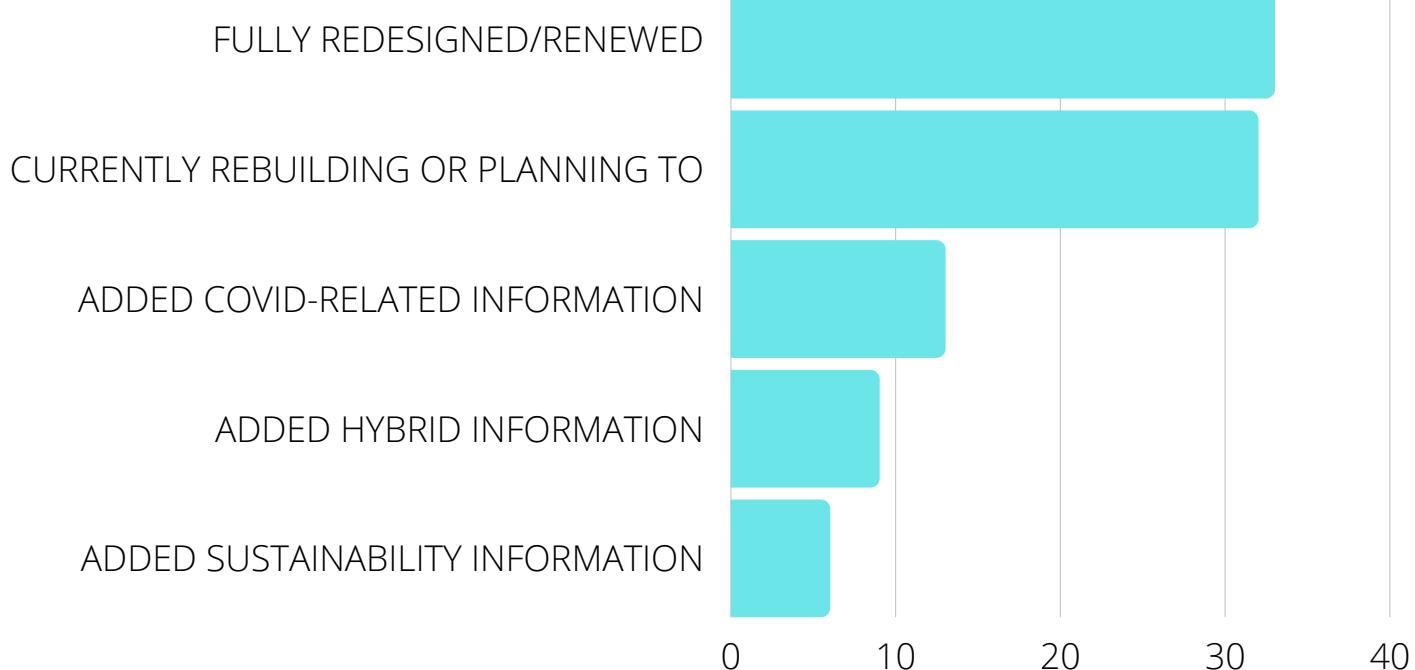
"We have been curating content to show audiences how our destination has adapted and innovated during Covid-19".

"We are finding new ways of engaging stakeholders in the city, including academia and the industry to stand behind the same message to strengthen our brand and positioning in the market".

Changes in convention bureaus' activities: Websites

For each destination marketing organisation, its website is an essential 'shop window' portal, displaying the advantages of the destination and giving details of the range of services that the convention bureau offers to partners/members as well as to business events organisers. Responses to this item in the survey indicated a high level of activity from February / March 2020 until February / March 2021 among convention bureaus, with most of them taking steps to improve the design and content of their websites.

Websites - number of mentions.



In almost equal numbers, the convention bureaus in the sample reported that they either had already redesigned or renewed their websites (33) or were currently doing so or had plans to do so later this year (32). One convention bureau stated that after fundamentally updating their website and adding new features and tools, they saw traffic increasing by 80%.

For those respondents mentioning specific types of new material placed on their website in this pandemic period, 13 gave examples of Covid-related information, focused largely on safety and hygiene measures present in their destinations. For example, one convention bureau emphasised the 'weekly updates from the regional government concerning Covid-19 measures' on their website. Another mentioned the new facility for local suppliers to be able to log-in to the website to update the information on their venues' capacities, respecting Covid regulations.

Changes in convention bureaus' activities: Websites

9 convention bureaus reported that they had already included on their websites information on opportunities for virtual and hybrid meetings in their destination – a trend almost certain to continue even after the pandemic comes under control. One convention bureau had even developed a ‘dedicated sub-site for hybrid meetings’. And 6 convention bureaus had included more content relating to sustainability, with one noting that their website had been ‘updated to allow a search for ‘green’ venues and suppliers’, and another highlighting that their website now listed ‘green activities for incentives’ in their region.

“The last 12 months have focused heavily on website development - new API feed for the venue listings, development of a digital map asset (launching this spring!) and lots of content”.

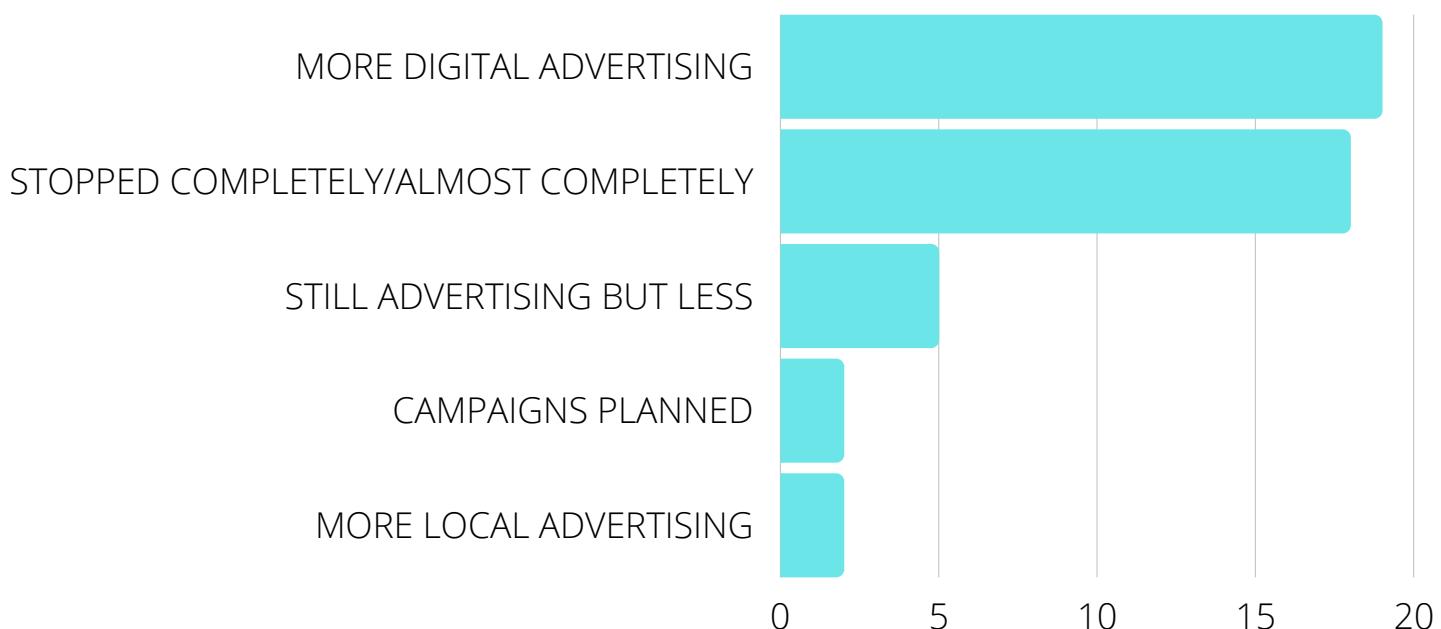
“We developed a new digital platform called BoxiT, based on our website, which allows our members to keep in contact with international clients”.



Changes in convention bureaus' activities: Advertising

In pre-pandemic times, B2B advertising was a technique widely used by convention bureaus to raise awareness of their destinations and to motivate planners to choose them for the hosting of their events. The majority of convention bureaus' advertisements were carried by our industry's many trade publications, most of which exist in print and in online versions. What impact has the pandemic had on this element of most convention bureaus' marketing mix?

Advertising - number of mentions.



Most of the convention bureaus in the sample reported no change in their use of advertising, and a significant number stated that they did not use this marketing tool. But 18 convention bureaus stated that during this period they had completely, or almost completely, stopped all advertising activities, and 5 others reported that they were doing less. Most of these linked this decision to a lack of funds, while others mentioned the ongoing uncertainty in the MICE market. One typical comment was 'All of our advertising is on hold until the borders re-open'.

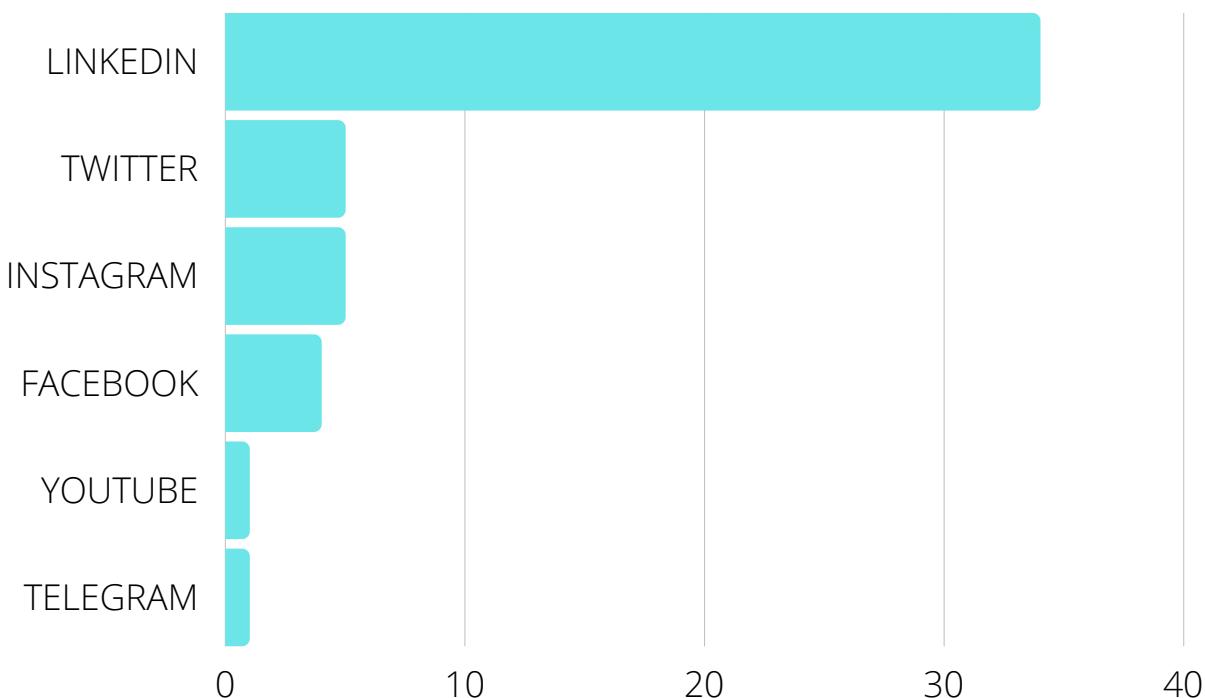
Only 2 convention bureaus indicated their intention to launch advertising campaigns later this year. And, confirming a trend noted elsewhere in this survey, 2 convention bureaus stated that their advertising had become more focused on their local markets.

However, the most significant change to emerge from the convention bureaus' responses was a clear trend towards the use of more digital forms of advertising, including considerable use of the social media, which will be explored in more detail in the following section.

Changes in convention bureaus' activities: Social media

In the 21st century, convention bureaus worldwide have increasingly adopted the opportunities offered by the social media in the marketing of their destinations, using them as a cost-effective means of promoting their brands and building valuable online networks of meeting planners and other decision-makers. As might have been anticipated, the pandemic has accelerated this trend, and most European convention bureaus have intensified and refined their social media involvement.

Social media - number of mentions.



While 30 convention bureaus simply reported a general increase in their use of the social media in general, 49 others specified which of the social media they had used more between February / March 2020 and February / March 2021. Their responses are shown above. LinkedIn is clearly the most favoured channel, well in advance of the other social media, and a number of convention bureaus mentioned that they had opened a LinkedIn account for the first time during this period.

The convention bureaus' comments indicated that their primary use of LinkedIn was to reach out to other stakeholders in the MICE community during a period when face-to-face contacts were extremely curtailed: 'I stopped using Facebook and Instagram, and I am trying to build a community on LinkedIn instead'; 'We use it to keep in touch with clients and let them know that we're still here!'. One convention bureau noted that they were using the LinkedIn Events feature to create webinars for their members and other stakeholders.

Changes in convention bureaus' activities; Social media

But there was also evidence from the responses that convention bureaus were using the social media in more nuanced and strategic ways than before, reflecting their improved awareness of the respective strengths of the various channels. Comments such as 'we have fully revised our social media strategy and now operate according to a strict editorial plan' indicate a growing sophistication in how convention bureaus are making use of these channels.

As well as engaging in more active posting on the social media, many convention bureaus reported that they had extended the range of topics covered in their posts, going beyond the usual destination updates. Covid-related information, details of opportunities for virtual/hybrid events in the destinations, and sources of business support for partners/members were the most frequently mentioned.

Finally, it is worthy of note that there were 4 convention bureaus in the sample who reported that they had entirely suspended their use of the social media during this period when their destinations were effectively closed for MICE business.

"We've continued to focus LinkedIn for the international market, and we went live on Facebook and Instagram with a campaign for the local market".

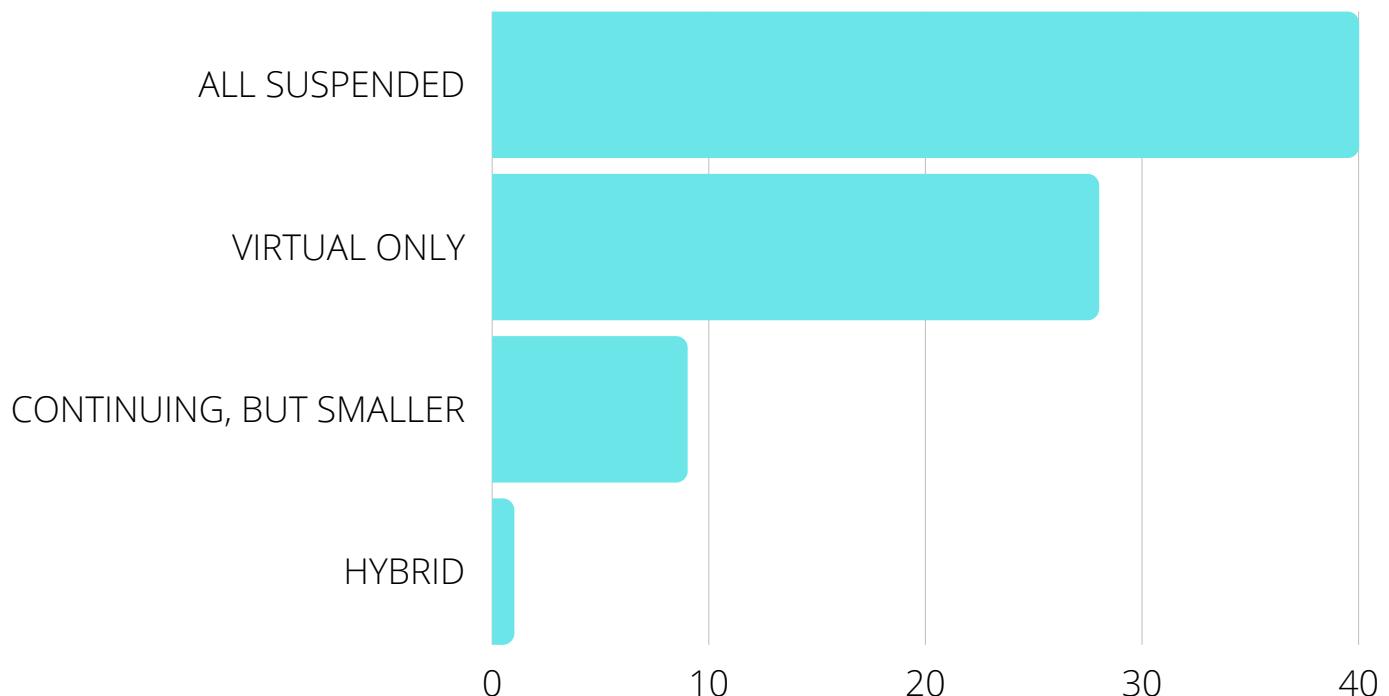
"We have improved our use of channels aimed at our local MICE industry in order to make sure that we share all our knowledge, analysis, insights, etc".

"The country is closed, and meetings cannot take place. So, no social media postings".

Changes in convention bureaus' activities: Fam trips and site visits

As an element of experiential marketing, in-person visits by planners and other potential clients are one of the most powerful techniques for educating them about any destinations' assets for the hosting of meetings and other business events. But during a period when international travel has been drastically restricted, how has convention bureaus' use of this tool changed?

Fam trips and site visits - number of mentions.



40 convention bureaus simply stated that they had suspended all such activities, citing travel restrictions, quarantine measures and lockdowns as the main reasons for making this decision. A further 28 convention bureaus reported that they were continuing to offer fam trips and site visits, but as virtual tours only. Only 9 reported that these visits were continuing in a physical form as in pre-pandemic times. But in such cases, most visits were for much smaller groups than before, often 3 or fewer participants.

1 convention bureau mentioned that they had held a hybrid site-inspection, with some participants following the event online and others physically present in the destination – a solution that could be more widely adopted when travel restrictions are more relaxed.

Changes in convention bureaus' activities: Fam trips and site visits

Reflecting a trend highlighted in other sections of this report, several convention bureaus indicated that they had begun to make more use of fam trips for their domestic clients rather than their international markets.

Finally, it was clear from the responses that some convention bureaus were exploring new ways of making virtual fam trips more interesting for participants. For example, one mentioned that they followed up virtual tours of their destination by sending each participant a gift box containing local products, as a means of making a greater impression.

“We held 1 fam trip and 5 site inspections, instead of the planned 6 fam trips and over 20 site inspections. As substitutes for these activities and to keep the links with our clients, we are offering thematic webinars (11 webinars since June 2020)”.



Changes in convention bureaus' activities: Participation in exhibitions

Many of us remember being profoundly shocked when we heard the news that the 2020 edition of ITB Berlin, which was due to run from 4 to 8 March of that year, had been cancelled. This action was one of the first clear indications of the severity of the coming crisis, and very soon exhibitions, large and small, for the business events industry were also being cancelled. In the 12 months that followed the cancellation of ITB Berlin, well established global events such as IBTM World and IMEX Frankfurt were replaced by virtual versions of these exhibitions, and a similar trend was seen in smaller, regional exhibitions.

In this survey's sample, 56 convention bureaus reported that they had attended one or more virtual exhibition during the period in question. A further 34 respondents specified by name the online exhibitions in which they had participated, with IBTM World Virtual, PlanetIMEX and the Meetings Show being the most frequently mentioned. Most convention bureaus adapted quickly to exhibiting in virtual events, with one mentioning, for example, that they had professionally-designed backdrops created for their participation in online exhibitions.

But not all 2020 exhibitions took place online, and there were encouraging signs of a potential return to face-to-face events for our industry. One example was Heavent Meetings which was held at the beginning of September, with around 350 exhibitors, 500 decision-makers, and 1,850 participants in the Palais des Festivals, Cannes. Held in strict adherence to the French health and safety constraints, the event included outdoor presentations on the venue's terraces.

However, 21 convention bureaus in the sample confirmed that they had participated in no exhibitions at all, whether online, hybrid or face-to-face, in 2020. And several of these emphasised that they had already stopped participating in these events even before the pandemic struck.

“We will only participate in this type of event when the European standards have been defined, for example vaccination passports”.

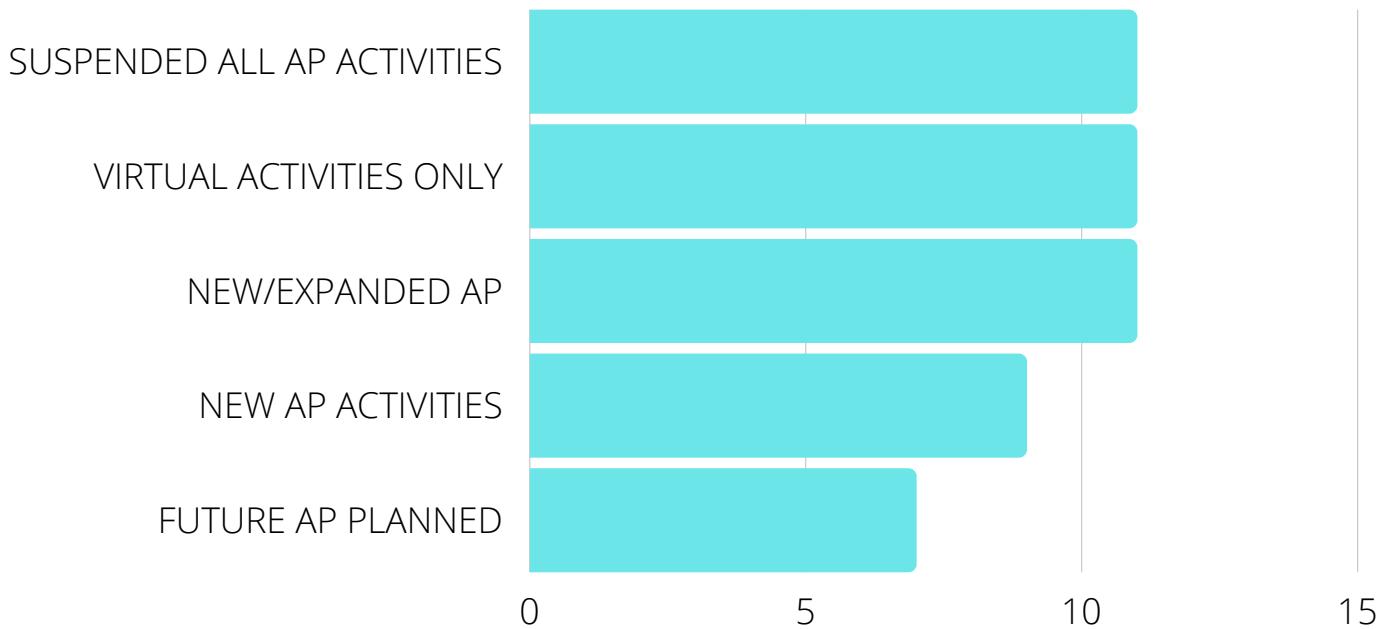
“Completely stopped until borders are reopened, and isolation is no longer mandatory”.

Changes in convention bureaus' activities: Ambassadors programmes

The experience of a growing number of convention bureaus has demonstrated that a well-supported ambassador programme can be an effective tool in helping destinations win conferences by working with local individuals who have the power to influence associations' decision-making processes in the destination's favour. The long lead-times of international association conferences in particular have already been mentioned, and these no doubt account in part at least for the responses of the majority of convention bureaus, who reported that they made no changes to their ambassador programmes between February / March 2020 and February / March 2021.

However, for other convention bureaus, this period brought a number of challenges to the functioning of their programmes. As a simple example, one respondent remarked that communication with their ambassadors had been very problematic as most of them were from the medical sector and therefore extremely occupied in exercising their professional activities.

Ambassadors programmes - number of mentions.



Such complications may partly explain why 11 convention bureaus suspended all ambassador programme activities during this period. The same number confirmed that their activities had continued, but had moved entirely online, with, for example, digital award ceremonies and training webinars to educate their ambassadors on virtual and hybrid meeting formats. Indicating convention bureaus' enthusiasm for this tool, 11 of them used this period to launch a new ambassador programme or to expand an existing programme by recruiting new ambassadors, and a further 7 confirmed that they would be launching a new programme later this year.

Changes in convention bureaus' activities: Ambassadors programmes

Innovations, mentioned by 9 respondents, included posting ambassador programme-related videos on the convention bureaus' social media channels and emphasising the role of their ambassadors in facilitating their destinations' post-pandemic recovery. One convention bureau even sent their ambassadors Christmas gifts, as their annual gala event had not taken place.

"We have dedicated significant time to recruiting new ambassadors as part of our city recovery plan to enable us to bid for more events for the future".

"Work on our ambassador programme has proved to be a challenge as the staff of the Conference Offices at our universities have been deployed into other areas due to the pandemic".

"The highlight of the ambassador programme is a yearly physical meeting where we spoil them. One was held in February 2020, before we were hit by Corona, and we've decided to postpone this year's meeting until we can arrange another physical event for them".

Changes in convention bureaus' activities: Market research

For destination marketing organisations, ongoing research is an essential activity that provides them with the market intelligence to guide all their activities. During this period, while 4 convention bureaus reported that they had suspended their market research activities (mainly for budgetary reasons), 21 had intensified their work of this kind.

The most frequently mentioned change (by 10 respondents) was a new focus on research into their 'proximity' markets (local, regional, national, as well as neighbouring countries), rather than international.

Inevitably, several convention bureaus mentioned that they were researching Covid-related research topics – for example, how other destinations were describing their Covid-ready venues, the impact of Covid on their own region, and the availability of government financial support for events and hospitality businesses affected by the pandemic.

While many convention bureaus said that they were doing their own original research, usually based on local or national surveys, others were making use of other organisations' data to stay informed of the changing situation in the business events market. The sources of data most often mentioned were ICCA; the business events industry's own professional associations; the trade press; the social media; and the data produced by the Strategic Alliance of the National Convention Bureaux of Europe.

A number of national sources of data were also found to be useful, including the Meetings Industry Association (United Kingdom); the Poland Meetings and Events Industry Report; and the Croatian National Tourist Board's publications.

"This is where we have placed all our resources.
We have six full-time members of staff
who invest all their time in research and sales.
We have gone through, for example,
all of the meetings in the ICCA database
(fitting size and rotation)".

"We are using a new research approach
and new platforms (for example,
SurveyMonkey) to conduct many surveys
among international buyers and our own
suppliers".

Changes in convention bureaus' activities: Advocacy

Local, regional and national governments are extremely important stakeholders for any destination marketing organisation, because their decisions can have direct impacts on the ability of convention bureaus to work effectively. This is most obvious in the case of those conventions bureaus that depend largely or entirely on public funding. Advocacy involves providing information to politicians and government bodies in order to secure and maintain their support, not only for individual convention bureaus and their partners/members, but often for the business events industry as a whole.

The position of convention bureaus in their communities offers them a central role in advocating on behalf of their destinations more broadly. And many argue that the extraordinary circumstances in which we now operate are making it more imperative than ever for destination marketing organisations of all kinds to reinforce their dialogue with politicians in order to raise governments' levels of awareness of the importance of the business events industry in economic, social and cultural terms.

While 1 convention bureau in the sample reported that they had stopped all their advocacy activities in this period, the general trend to emerge from the survey results is one of an intensification of the advocacy role of convention bureaus across Europe, with a number of them engaging in this activity for the first time. 7 respondents claimed to have 'significantly increased' this activity in general. But 22 more gave specific details of their actions: 12 boosted their lobbying of local and national governments to increase awareness of our industry and advocate for financial support for businesses adversely affected by the pandemic; and 10 convention bureaus mentioned that they had initiated strategic alliances with other organisations, to build coalitions and strengthen their networks in order to be able to advocate more effectively and leverage resources.

"We have ensured that our destination has a voice within both local government and national government circles, ensuring that they understand the impact that the pandemic has had on the city region and its conference product"

"We have been leading the initiative for government support for our national meetings industry, and we were - and continue to be - successful. For the first time in our 30 years' history, our meetings industry has been heard".

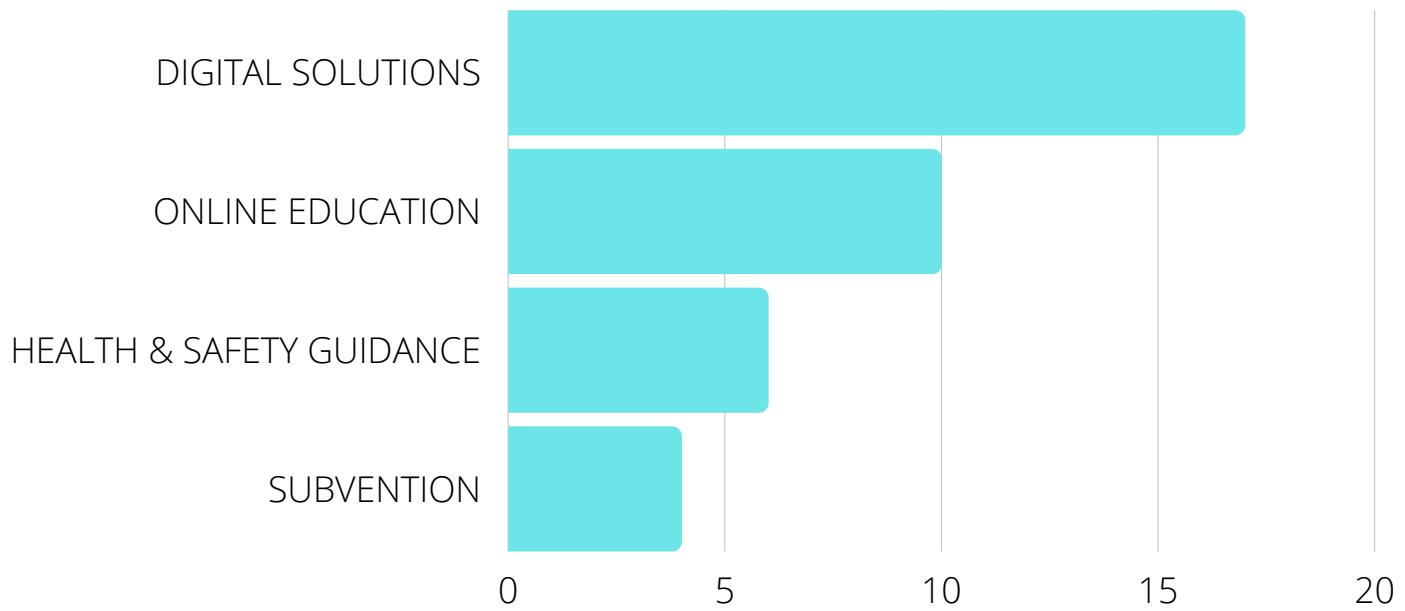
"We have helped to create a wide platform covering other MICE-related organisations, with joint activities aimed mainly towards government in order to increase the visibility of our industry and lobby for a compensation programme".

Changes in convention bureaus' activities: Services for meeting planners

It is in the best interests of all stakeholders for business events to run successfully in the destinations chosen for them. Successful events can raise the positive reputation of the destination as a whole and lead to repeat business and positive word-of-mouth. For that reason, most convention bureaus offer meeting planners a range of free services before, during and after their events, representing a form of 'one-stop shop', saving planners time and money – and reducing their stress levels too.

The responses to this survey indicate that between February / March 2020 and February / March 2021, convention bureaus across Europe continued to actively support planners, at a time of widespread cancellations and postponements of their events. Although the most immediate type of support required by planners in the early days of the pandemic was help with finding alternative dates for their events, the results below show that convention bureaus' assistance for meeting planners in this period as a whole extended to a much broader range of valuable services.

Services for meeting planners - number of mentions.



Changes in convention bureaus' activities: Services for meeting planners

The most significant change to emerge from the survey's results is a reinforcement of the educational role of the convention bureaus in the sample, through their provision of new tools and learning opportunities for planners in the form of blogs, webinars, podcasts, and other online learning platforms. Guidance on virtual and hybrid events planning was the most frequently mentioned individual topic, with some convention bureaus admitting that they had to rapidly familiarise themselves with this topic before being qualified to educate others. The provision of guidance on the health and safety protocols in operation at the destination also emerged as a form of support for planners, followed by information on new subventions available for international conferences, from 4 convention bureaus in the sample.

“We got ourselves trained in hybrid events, to offer services related to this to planners and to accompany them better to navigate the new normal”.

“We are developing a new platform where our partners can directly interact and create programmes virtually with meeting planners”.



Changes in convention bureaus' activities: Training

Convention bureaus' training activities were not limited to providing education and guidance to meeting planners. Many used the exceptional circumstances of 2020 to invest time in increasing their own skills and knowledge, as well as those of other key stakeholders in their destinations, such as members, partners, and ambassadors.

19 convention bureaus stated that they had increased their training activities in this period, without specifying particular topics. 13 others mentioned that they had launched webinars, online workshops or other online training platforms for their partners/members. For those convention bureaus specifying their training topics, the theme of virtual/hybrid meetings was the most commonly mentioned (by 10), followed by sustainability (3).

Other training themes were safety and hygiene, customer relationship management, sales training for key account managers, social media, online presentations and smart working.

Regarding the sources of training materials used by the convention bureaus in the sample, the national and international meetings industry associations were cited several times, for example: PCMA (Digital Skills/Digital Event Strategist), MPI, and SITE (Certified Incentive Specialist). The online training services offered by LinkedIn were also in use by several convention bureaus.

“We have organised ‘Safe to Visit’ courses, together with our top doctors.”

“Our team is engaged in our own training on customer journey, sustainability, equality and legacy – and also through the Swedish Network of Convention Bureaus”.

“The virtual training sessions from ICCA, the Meetings Industry Association and VisitBritain have been really valuable”.

Changes in convention bureaus' activities: Destination management and infrastructure

In the 21st century, a growing number of convention bureaus have assumed a measure of responsibility for facilitating the physical development of the destinations they represent. While their principal focus is still on marketing, these convention bureaus have extended their role to include encouraging improvements in the 'destination product', to ensure that their towns and cities continue to offer what clients want from the places where their events are held.

In the survey sample, 24 convention bureaus stated that they were actively involved in providing advice, data and, in some cases, financial assistance to stimulate improvements in their destinations' infrastructure for the hosting of business events in these exceptional times.

The Covid-related initiatives specifically mentioned were: encouraging the development of outdoor food and beverage venues; and motivating venues to adapt their technology facilities to enable them to host hybrid and virtual meetings.

However, the other theme to emerge under this heading was sustainability, with 5 convention bureaus highlighting their efforts to improve the sustainability of their destinations, by, for example, encouraging their suppliers to earn accreditations such as the Global Destination Sustainability Index (a leading sustainability benchmarking and improvement programme for destinations), Green Key and Green Tourism.

Our role as a leader for destination development has become even stronger than before. We have encouraged a number of hotels to use the opportunity (...) for renovation. And we have stimulated some product development by other suppliers (online services, digital tools, new programmes)"

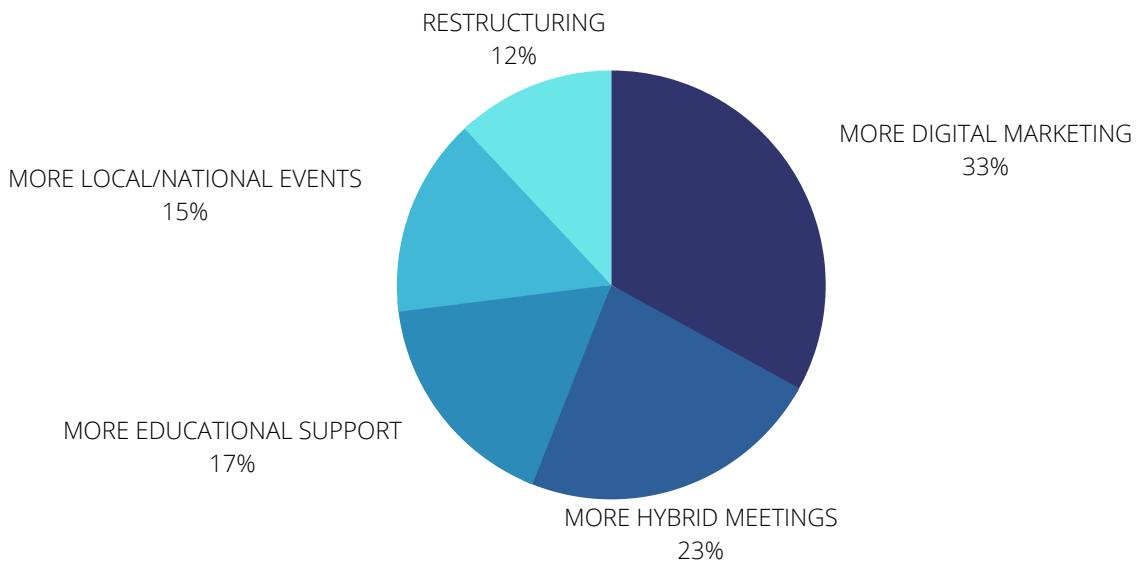
"We have been offering our partners a 50% contribution towards the cost of gaining Green Tourism accreditation"

"In 2020 we have worked out the business model and design concept of a new venue with a specialisation in health care conferences".

Convention bureaus' futures: Short-term

Most convention bureaus' responses to the question, 'What changes do you expect to experience or to make in the next 6 months' revealed their widespread uncertainty about the immediate future, due to the difficulty of making predictions in a context where so many factors were unclear - notably the effectiveness of the national vaccination programmes and the ability and willingness of people to travel, especially internationally. However, a significant minority of respondents expressed their conviction that during 2021 our industry would find itself in restart/recovery mode, with a general resumption of traditional convention bureau activities, albeit in altered forms.

What changes do you expect to experience or to make in the next 6 months?



Of the convention bureaus that specified the changes they were anticipating in the short-term, almost one-third focused on their growing use of digital tools in their marketing in the next 6 months – for example, virtual site inspections, online bid books and digital advertising. Technology also featured in the next most common category of predictions - the expectation of more hybrid meetings, and the need for destinations to prepare for these.

The convention's bureaus' intentions to provide their stakeholders with more educational support was also an important forecast, with respondents specifying that they would be focusing on providing more data and intelligence on market trends, reflecting the changing situation. Several convention bureaus signalled their intention to become a 'knowledge hub' for their destinations, with one claiming that this role was just as important the as sales and marketing function of their organisation.

Convention bureaus' futures: Short-term

Reflecting a change in the market that has appeared in other sections of this report, the shift towards the hosting of more local and national events to replace lost international business also featured in the convention bureaus' responses to this question. And in terms of respondents' internal matters, it is significant that 8 convention bureaus expected an organisational restructuring in the months ahead – with 3 of them indicating likely merges with broader city promotion agencies or local agencies for economic development and inward investment.

Other anticipated trends mentioned by respondents were: meetings with fewer participants; a greater focus on health and safety; and continuing uncertainty over funding, with fewer potential partners available to convention bureaus.

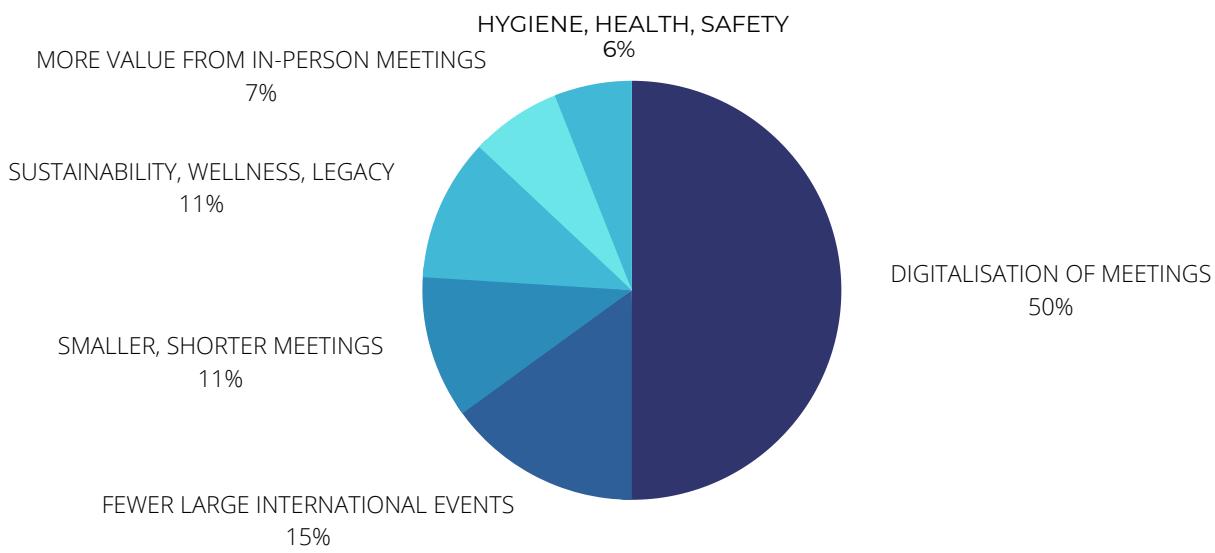
"We might experience major changes in the next 6 months if local partners go bankrupt. This has not been the case so far, but if tourism does not open up before the summer, some partners will struggle to survive. In a small destination like ours where suppliers are limited, this will have a huge impact".

"We will need to become respectable partners for all stakeholders in the industry. Less marketing and sales, more useful content and projects for the industry".

"We will concentrate on the intellectual value the city can add to meetings – links to universities and Research & Development institutions, access to business clusters etc. This is where we and associations can work together to create better, more meaningful meetings".

Convention bureaus' futures: Long-term

As a consequence of the pandemic, what long-term changes do you expect the meetings industry to experience or to make?



98 of the convention bureaus in the sample indicated their conviction that hybrid and other forms of digitalised meetings were now here to stay, and that the pandemic had accelerated the trend towards meetings of this kind. 50% of all trends mentioned were on the theme of the continuing digitalisation of meetings. Several respondents representing small and medium-sized destinations were optimistic that this trend meant that they could now bid for hybridised meetings that would have been too large for them to host back in previous times when almost all delegates participated in person. As one convention bureau stated: 'This will give a chance for smaller destinations to host major events, when overseas delegates will not participate in-person. This could be an opportunity to position small destinations as cool meeting places, as they are more intimate than big cities'.

Other responses to this question demonstrated that the convention bureaus expect that some of the emerging trends identified in this report will be consolidated in the longer term. There was a clear consensus that there will be fewer large international conferences in the foreseeable future, leading to more intense competition between destinations wishing to host these events. 10 convention bureaus anticipated an increase in the number of multi-hub events, splitting up international conferences to a number of regional hubs, rather than one much large event in one place.

Other trends that respondents expected to accelerate in the future were: smaller and shorter meetings; more focus on wellness and sustainability elements, including the social legacy of meetings; and greater attention paid to hygiene, health and safety in venues and in the wider destination.

Convention bureaus' futures: Long-term

13 respondents expressed the view that there will be an obligation on the planners of hybrid events, and indeed any event including face-to-face elements, to clearly demonstrate that they provide higher levels of value for in-person participants, though, for example, higher quality social programmes and networking elements, to justify the investment of time and money in attending. The need for more authenticity and less superficiality was also identified as a necessary improvement in meetings quality. One convention bureau anticipated that as in-person attendance at any event would be perceived as a 'luxury', the cost of participating in that way would need to be justified. Another respondent emphasised the role that convention bureaus will have to play in this respect: 'Destinations will need to clearly understand their clients' aims and objectives for holding a live event - and emphasise how they can help their clients deliver it'.

"Digital presence in meetings is now widely accepted as a practice. We will have smaller physical attendance and larger online. However, we will be able to have more events. Content will be king, and sustainability will be key".

"It may come about that meetings quality will be placed further to the forefront, and that, as in-person participation becomes more of a privilege, the social aspect of events will have more priority, as distinguished from pure information transfer, which can certainly take place in online formats".

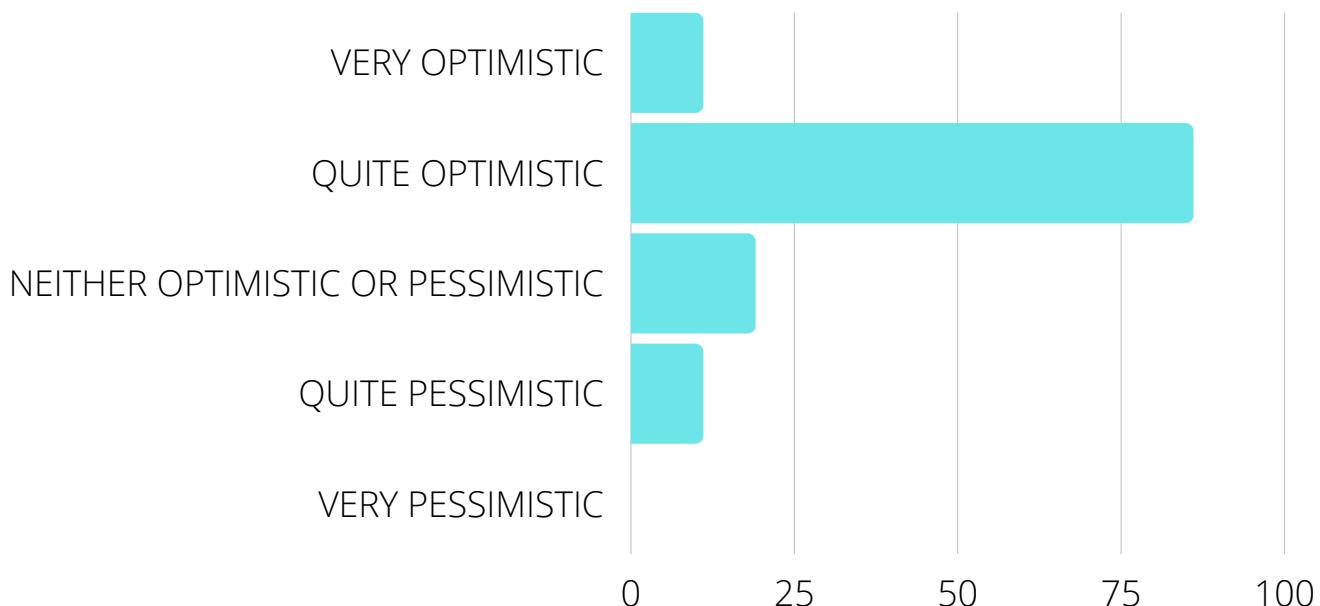
"I think there will be a return to face-to-face events in the future, but I feel that there is going to be an ongoing requirement for hybrid elements in conferences due to travel restrictions, lack of confidence of people to travel initially, and budget restraints within organisations to send staff to international conferences".

"The industry will need to champion the importance of face-to-face meetings and demonstrate that they can be delivered sustainably. Effective networking experiences offered by the organiser will be critical to the success and ROI of face-to-face meetings".

Convention bureaus' sentiment analysis

The final questions in the survey focused on convention bureaus' sentiment about the future of our industry and the reasons for respondents' feelings towards the times that lie ahead.

**Concerning the future of the conference industry, how do you feel?
(127 responses)**



It is clear that the balance of opinion tends towards the anticipation of a positive outlook for our industry, with over 76% of respondents reporting that they feel very optimistic or quite optimistic for their professional future.

The principal reason given for this optimism was the natural human longing for coming together with others, in physical events, summed up in one convention bureau's response: 'We are human, and we want to meet. We want human interaction. You cannot recreate the spark of creativity you get from an in-person event. Those chance meetings at a coffee station, hotel lobby or social event cannot be replicated through virtual events'. The most frequently-given reasons for convention bureaus' responses are shown on the next page.

Reasons for convention bureaus' feelings regarding the future of the conference industry.
(Number of mentions shown in brackets).

Reasons given for feeling neutral ('neither optimistic nor pessimistic') OR 'quite pessimistic'

General uncertainty about the future and the pandemic's impacts on the economy and on travel (6)

The reopening of our industry will be slow and lengthy (up to 3 years before recovery comes) (4)

A balance of positive and negative feelings: positive about hybrid meetings, more pessimistic about the return of large international conferences; pessimistic about the next few months, but more optimistic for the period after that (3)

Many face-to-face meetings will be replaced by virtual events, leading to a fall in income for local partners (3)

No clear plan from our government (3)

Unwillingness of participants to travel to face-to-face events (2)

Reasons given for feeling 'very optimistic' OR 'quite optimistic'

The intrinsic human longing for face-to-face meetings, for live experiences and networking (43)

Excitement about the new opportunities presented by hybrid events, their power to enhance meetings, attract more participation and open up the hosting of large conferences to small and medium-sized destinations (14)

Features that make the respondents' own destinations attractive for events in a post-pandemic world: a well vaccinated population, stability, suitable for hosting smaller and medium-sized events, natural resources for outdoor elements of events (10)

'Zoom fatigue' and other limits of virtual events (9)

The effectiveness of vaccination programmes (9)

Our industry's resilience and ability to adapt to new circumstances (9)

'Light at the end of the tunnel', visible signs of recovery, new bookings (7)

Appendix 1 Destinations represented by the convention bureaus participating in the survey.

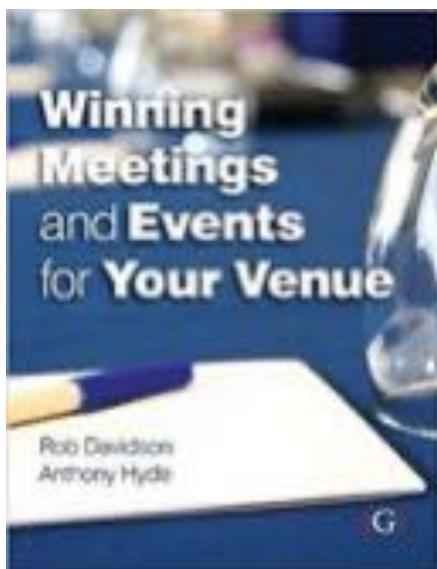
- Aarhus
- Åland
- Ålesund & Sunnmøre
- Amsterdam
- Athens
- Austria
- Baix Llobregat
- Barcelona
- Basel
- Bergen
- Berlin
- Bern
- Bologna
- Borås
- Bordeaux
- Bristol & Bath
- Bruges
- Brussels
- Budapest
- Burgos
- Bydgoszcz
- Cambridge
- Cascais
- Cologne
- Croatia
- Czech Republic
- Denmark
- Dublin
- Dubrovnik
- Düsseldorf
- East Sweden
- Espoo
- Estonia
- Faroe Islands
- Finland
- Flanders
- Florence
- Gdansk
- Genova
- Gent
- Germany
- Gijon
- Glasgow
- Gothenburg
- Hasselt

- Hauts de France
- Helsinki
- Hull
- Ibiza
- Iceland
- Italy
- Jena
- Jerusalem
- Jönköping
- Jyväskylä
- Karlstad
- Kerry
- Krakow
- Kuopio
- Kyiv
- Lake Como
- Latvia
- Leeds
- Leuven
- Lisbon
- Liverpool
- Ljubljana
- Lodz
- London
- Lublin & Region
- Lucerne
- Luxembourg
- Lviv
- Lyon
- Maastricht
- Madrid
- Malmö
- Malta
- Manchester
- Marseille Provence
- Montenegro
- Montreux Riviera
- Munich
- Nantes & St Nazaire
- Naples
- Newcastle & Gateshead
- Noordwijk
- Norway
- Nuremberg
- Opatija

- Örebro
- Padua
- Paris
- Pärnu
- Poland
- Porto
- Potsdam
- Poznan
- Prague
- Riga
- Riviera di Rimini
- Salzburg
- Schleswig-Holstein
- Scotland
- Serbia
- Sheffield
- Skellefteå
- Slovenia
- Spain
- St Gallen
- Stockholm
- Stuttgart
- Switzerland
- Tallinn
- Tampere
- Tatarstan
- Tel Aviv
- The Hague
- Thessaloniki
- Ticino
- Tirol
- Tórshavn
- Torun
- Trollhättan
- United Kingdom
- Uppsala
- Ural
- Utrecht
- Vienna
- Vilnius
- Vorarlberg
- Wrocław
- Zagreb
- Zaragoza
- Zurich

Appendix 2 Books by Rob Davidson and others

For more information: www.miceknowledge.com



Business Events

By Rob Davidson

[https://www.taylorfrancis.com/
books/mono/10.4324/978131518
6344/business-events-rob-
davidson](https://www.taylorfrancis.com/books/mono/10.4324/9781315186344/business-events-rob-davidson)

Marketing Destinations and Venues for Conferences, Conventions, and Business Events

By Tony Rogers and Rob
Davidson

[https://www.taylorfrancis.com/
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459066/marketing-destination
s-venues-conferences-
conventions-business-events-
rob-davidson-tony-rogers](https://www.taylorfrancis.com/books/mono/10.4324/9780080459066/marketing-destination-s-venues-conferences-conventions-business-events-rob-davidson-tony-rogers)

Winning Meetings and Events for your Venue

By Rob Davidson and Anthony
Hyde

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