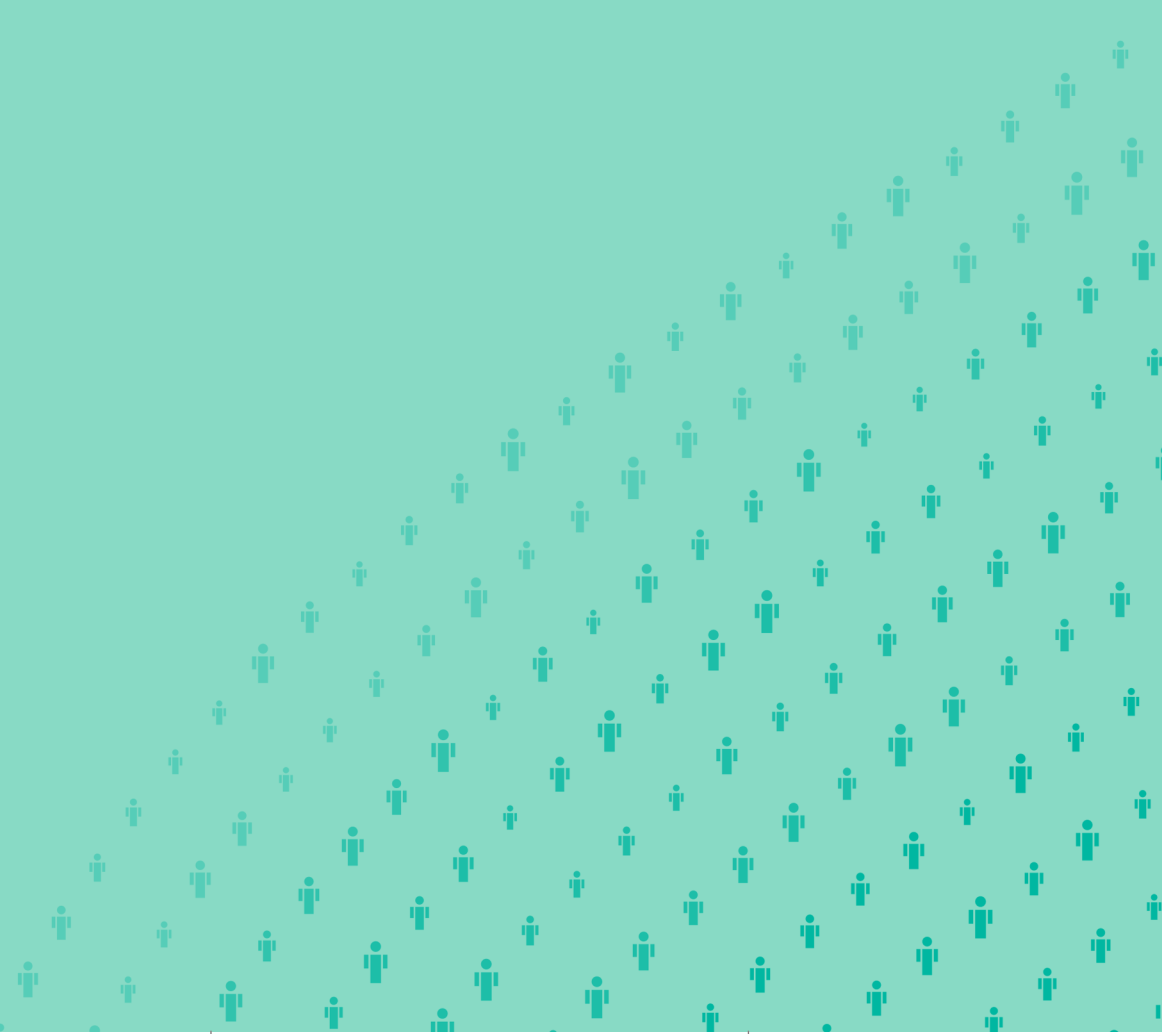




The Future of Global Association Meetings - The New Association Reality

Survey Report



in collaboration with:





The global community and knowledge hub for the international association meetings industry

The future of global association meetings - The New Association Reality

Executive summary

In May 2020, ICCA worked in collaboration with several leading industry bodies to identify what changes associations have made and intend to make due to the impact of COVID-19. In particular, the research investigated the recovery processes and activity undertaken to build more sustainable associations and ensure their long-term success as well as their ongoing use of meetings as a key communication, networking and education tool.

The research, which was conducted amongst the ICCA Association Community and in partnership with AfSAE (African Society of Association Executives), APFAO (Asia Pacific Federation of Association Organisations) and ESAE (European Society of Association Executives), examined the strategies and plans of almost 200 associations around the world.

This report examines the findings and presents the headline results for the benefit of both ICCA members and the ICCA Association Community.

Amongst the more in-depth results, key findings in the research include:

- **66%** believe that COVID-19 will fundamentally change how they operate in the future.
- Event and sponsorship revenue sources are under review by **55%** of associations, whilst **49%** are reviewing membership models.
- **84%** intend to include hybrid and digital elements to events going forward, with a general opinion that they should lead to increased attendance.
- **60%** of respondents believe that there are limitations to the ultimate success of virtual events when compared to face to face.
- **28%** said geographic rotations are under review and likely to change in the future.
- **78%** would consider the use of a meetings management company going forward.
- There is significant opportunity for the supply side of the meetings industry to **support clients through increased flexibility and innovation.**

Above all else it is clear that the COVID-19 situation is dynamic and fast moving – creating challenges for all sectors. This is reflected throughout the associations representing those sectors and their short, mid and long-term approaches to meetings and conference portfolios.

Clearly there is volatility in the market and a need to innovate and create solutions. For the long-term benefit of all we need to work together, we need to work in partnership, we need to be flexible. Venues and destinations must appreciate the financial needs of clients if they are to survive, clients must equally understand that without their long term support the venues and destinations cannot survive.

Working together to identify new strategies, new working practices and new technical solutions is the best way forward for the whole industry. All the respondents clearly accepted and believed that meetings offer big value in terms of both knowledge and finances – and there is an opportunity for that to grow if we all work together for a successful future.

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Results

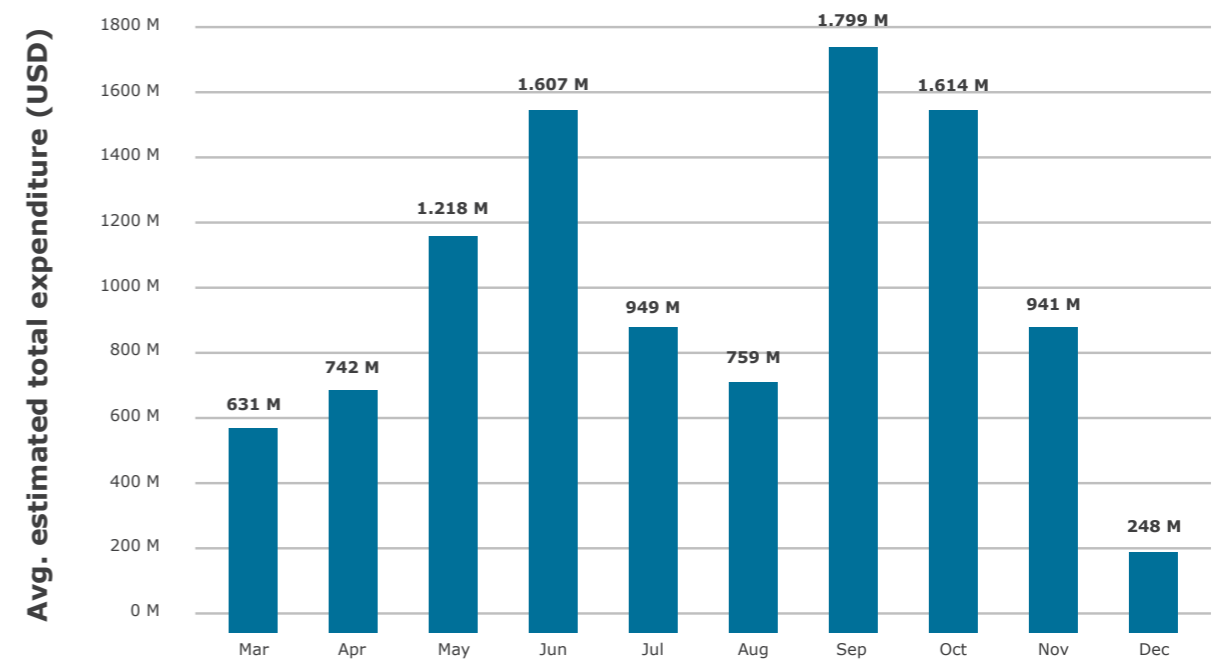
Impact of COVID -19

With 70% of the respondents indicating that they had postponed one or more of their events, including annual conferences, the research is a stark reminder of the impact COVID-19 has had across the whole of our sector. Each one of these cancellations represents not just a loss in terms of delegates fees for an association but revenue for venues and suppliers as well as decreased economic impact for cities and countries.

Economic impact

ICCA Data shows that on average, USD 10.5 billion is spent at international association meetings in the months March until December – excluding spin-off expenditure.

Figure 1: Avg. estimated total expenditure USD in Mar-Dec (2016-2019)

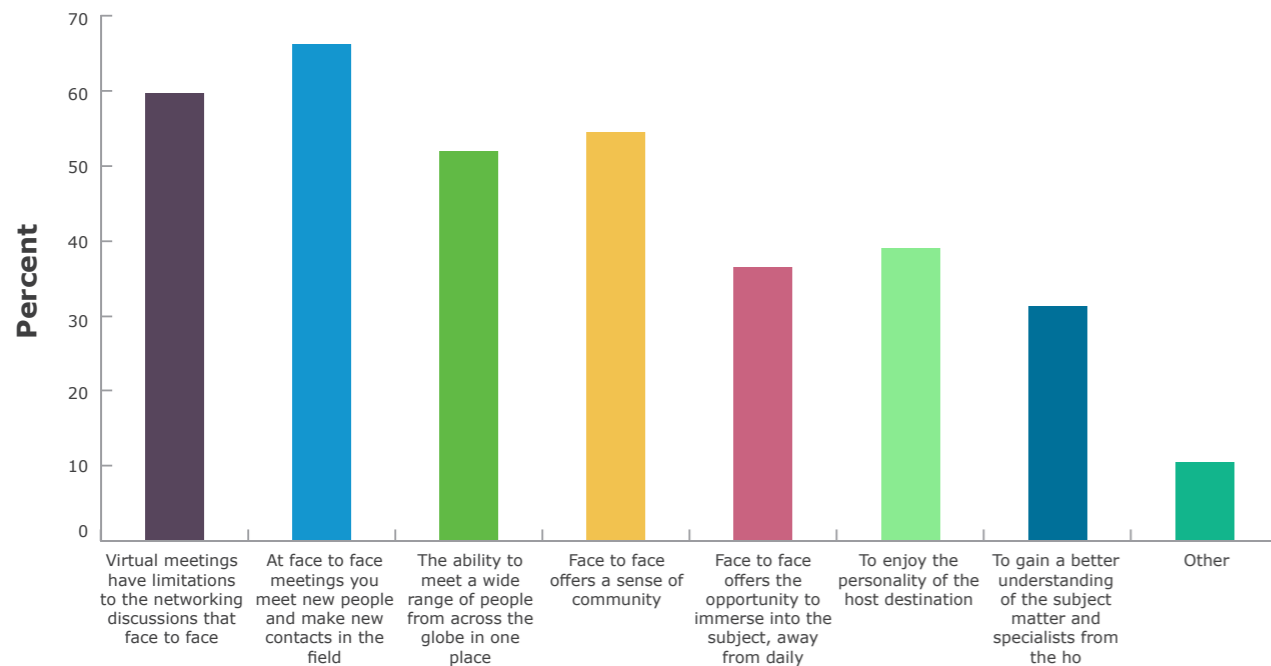


The value of face-to-face meetings

The research highlights the fact that 60% of the respondents felt that virtual meetings have limitations to the networking discussions they can facilitate when compared to face-to-face. When added to other key findings about the value of meetings it is easy to believe that less global meetings will impact many sectors due to decreased networking, knowledge-sharing and business growth as can be seen in *Figure 2*.

Figure 2 - What are your members saying about the value of face to face meetings? What do they miss about face to face?

- Virtual meetings have limitations to the networking discussions that face to face meetings offer 60%
- At face to face meetings you meet new people and make new contacts in the field 66%
- The ability to meet a wide range of people from across the globe in one place 52%
- Face to face offers a sense of community 55%
- To enjoy the personality of the host destination 39%
- Face to face offers the opportunity to immerse into the subject, away from daily tasks 36%
- To gain a better understanding of the subject matter and specialists from the host location 31%



Clearly these figures highlight the fact that the camaraderie apparent in face to face meetings does not exist at the same level when working digitally and remotely.

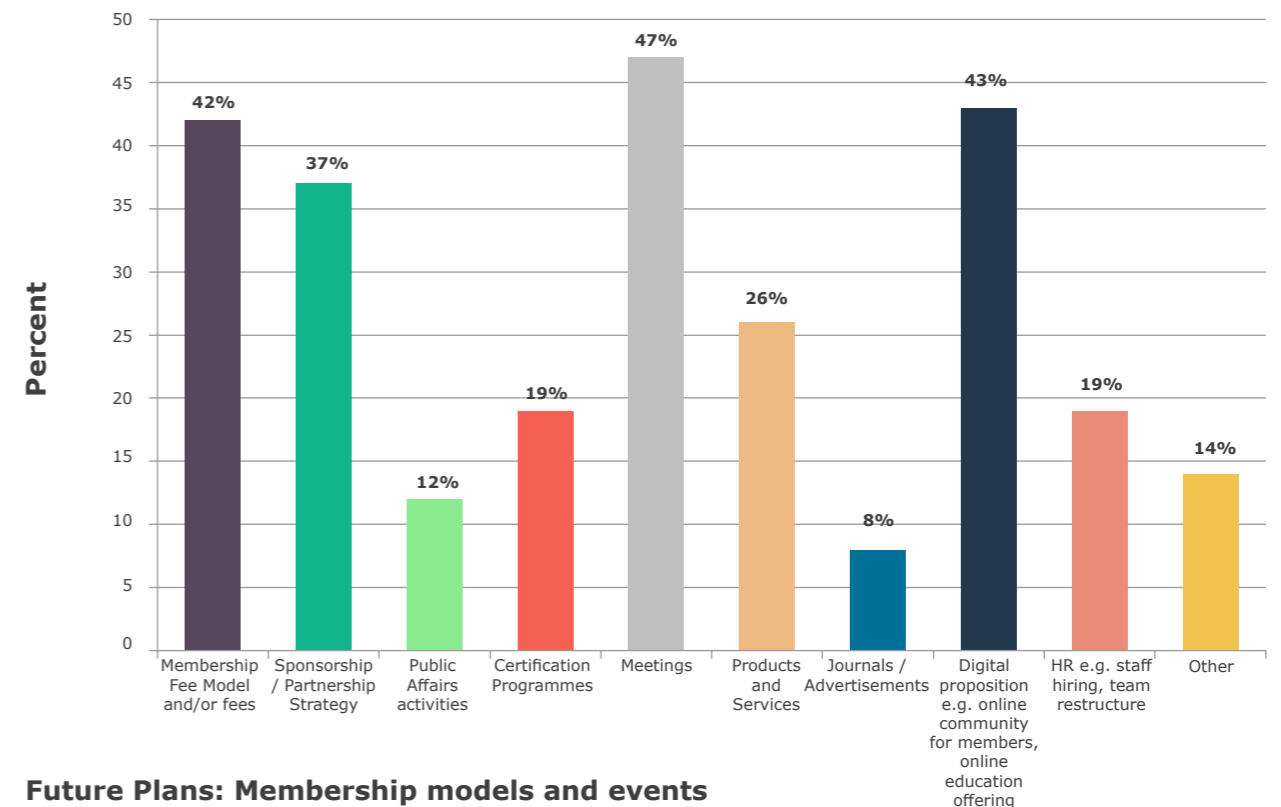
Future Plans: Revenue sources for associations

Our focus on international conferences and congresses means it is easy to overlook the wider associations world and the fact that they deliver a host of different valuable products and services for their members. COVID-19 is having a significant impact on all of these areas – notably sponsorship and partner programmes which are being impacted and reviewed by 55% of the respondents. An equal number are also reviewing their meeting portfolio. Most challenging perhaps for 49% though is the fact they are having to reconsider their entire membership model and fee structure. Full details of the changes being considered are outlined in *Figure 3*.

Figure 3 - Considering the current disruption and new measures you had to put in place, which revenue sources will you change to adapt to a new future?

Multiple answers were possible:

- Membership Fee Model and/or fees 42%
- Sponsorship / Partnership Strategy 37%
- Public Affairs activities 12%
- Certification Programmes 19%
- Meetings 47%
- Products and Services 26%
- Journals / Advertisements 8%
- Digital proposition e.g. online community for members, online education offering 43%
- HR e.g. staff hiring, team restructure 19%
- Other 14%



Future Plans: Membership models and events

One of the most significant figures revealed in the research is the fact that **66%** of the responding associations believe that the impact of the COVID-19 crisis will fundamentally change how associations and their members operate in future.

It is natural though for us as an industry to focus on the statistics and results that are most relevant to the organisation of events. Close scrutiny of the responses shows that many people feel that events are seen as essential. However, due to relatively positive experiences of digital solutions it is expected that audiences will demand more of this in the future.

It is a simple fact that COVID-19 has forced everyone to realise that most events will in the future include an option not to physically attend. The obvious extension of that premise is an increase in hybrid events. For some this is seen as a challenge, however it should in reality be considered an opportunity that could actually deliver increased attendance if handled correctly. The simple truth is that we are still learning how to maximise the tools available on digital platforms and we are creating more and more authentic ways to communicate in digital spaces at an incredibly fast speed. What was historically a concept and a nice-to-have has become a necessity. In this respect, at the very least, COVID-19

has been a significant eye-opener.

The changes and subsequent opportunities facing us are highlighted when asking the responding associations how technology will change the way they conduct their meetings – a significant 84% said that hybrid and digital elements will be a part of the way they conduct events moving forward for the short-term. Amongst those, 10% said they would invest in professional production of digital content, 11% would use high quality streaming for keynote sessions, 28% would use low cost solutions to meet their event needs.

There are however other significant changes being seen across future meetings due to the impact of COVID-19 including the fact that 28% said they will be changing the rotation patterns of their meetings. The result of this could provide both positives and negatives for the meetings industry as some associations suggest meeting closer to head office, whilst others consider an increase in regional rather than global rotations.

With social distancing now a normal part of everyday life it comes as no surprise to note that 54% expect event attendance to drop in 2020 with a further 28% unsure what to expect. 2021 shows similar opinions with 34% expecting to see events decrease to half their size and due to significant market uncertainties a further 35% unsure as to what will happen.

Flexibility and partnerships

Instability in terms of numbers and ongoing lockdowns around the world have significantly impacted decision-making processes – whether that is to cancel a currently planned event or book a future destination. Flexibility has become the most important word for many associations, with delegates expected to have shorter registration periods. Many 2021 event decision have for example been put off by six months.

Underlying all this are association concerns about whether their delegates will even be willing to travel to events.

- When health and safety measures are in place 28.6%
- When there is a vaccine 28.6%
- When the virus is 'under control' in the destination 15.6%
- When travel restrictions lift 10.4%
- Other, please specify: 16.9%

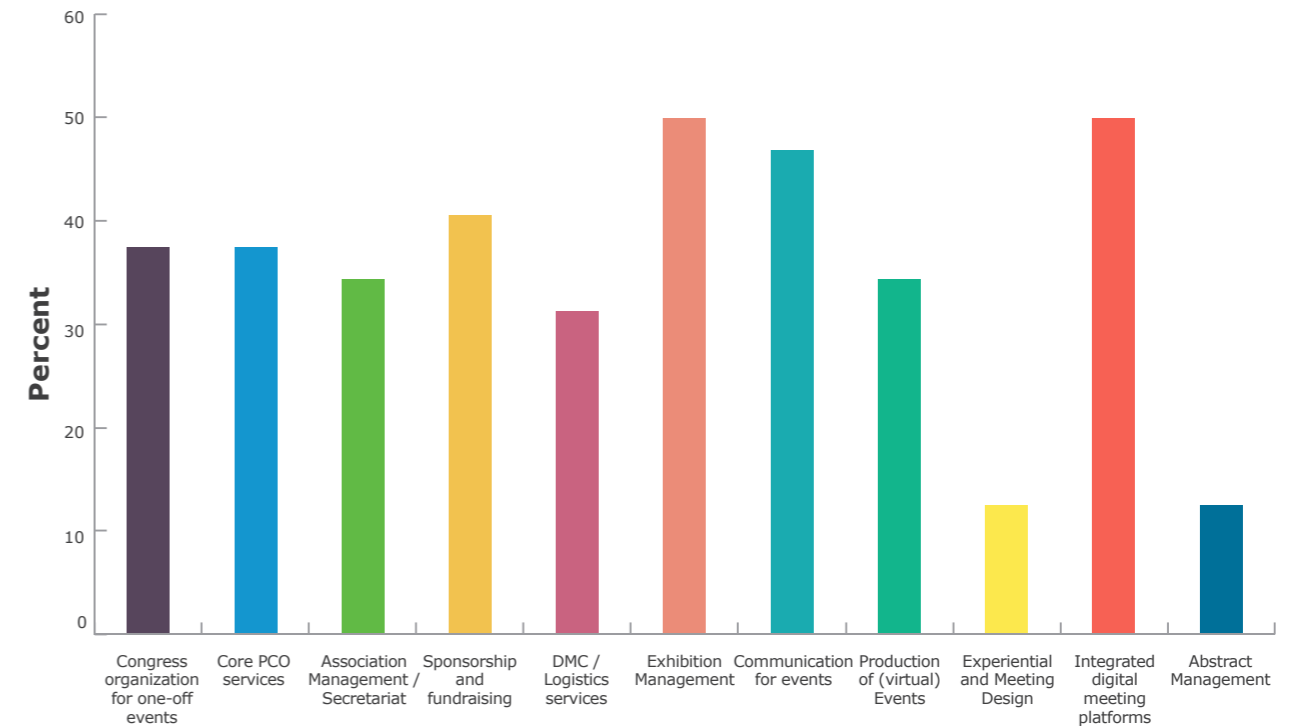
Partnership Support

Partnerships, networks and support have never been so important for businesses of all types. With 78% of respondents saying they would consider the use of a meetings management company in the future there is incredible diversity in terms of what services they would seek from potential partners as shown in Figure 4.

Figure 4 - If you use services of Meetings Management companies in future what services will be of greatest importance to you, please mark all that apply: Multiple answers possible:

- Congress organisation for one-off events 37.5%
- Core PCO services 37.5%
- Association Management / Secretariat 34.4%
- Sponsorship and fundraising 40.6%
- DMC / Logistics services 31.3%
- Exhibition Management 50.0%
- Communication for events 46.9%
- Production of (virtual) Events 34.4%

- Experiential and Meeting Design 12.5%
- Integrated digital meeting platforms 50.0%
- Abstract Management 12.5%



Those not considering the use of a third-party partner cited the reasons detailed below, which suggest there are ample opportunities for agency PCOs to demonstrate value and potentially win new business:

- Have not used PCO services in the past 50%
- Budget reasons 38%
- Have in-house staff 12%

From the supply side of the market, associations are looking for cities and destinations to support COVID-19 policies through clear guidelines on city-wide requirements with respect to social distancing, masks and other requirements for visitors. They are also looking at support via no-fault cancellations and small accommodation room blocks to help plan.

They also request venues implement a range of measure as outlined in Figure 5.

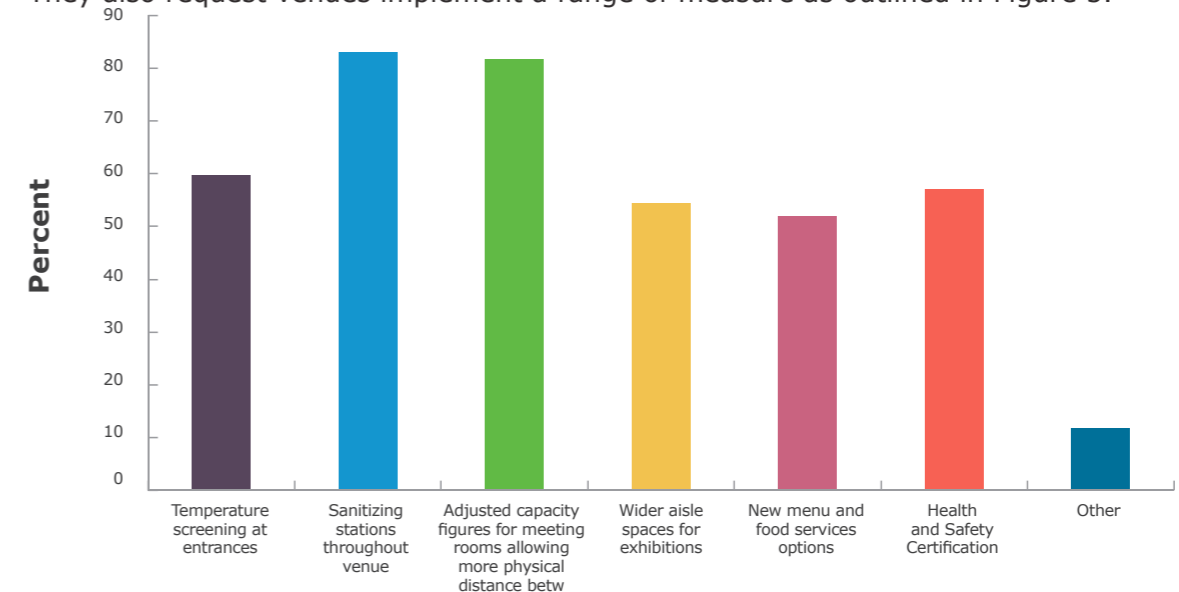


Figure 5 - What are you expecting venues should implement for safer face-to-face meetings in future? Multiple answers possible:

- Temperature screening at entrances 59.7%
- Sanitizing stations throughout venue 83.1%
- Adjusted capacity figures for meeting rooms allowing more physical distance between attendees 81.8%
- Wider aisle spaces for exhibitions 54.5%
- New menu and food services options 51.9%
- Health and Safety Certification 57.1%

Both destinations and venues can also play a vital role in supporting the long-term future of associations through measures shown in Figure 6.

	Yes	No	Not sure
Membership recruitment	41.0%	39.3%	19.7%
Benefits to members	76.2%	15.9%	7.9%
Creating new events	63.3%	21.7%	15.0%
Legacy Programmes	53.4%	25.9%	20.7%
Sponsorship of association and meetings	90.8%	1.5%	7.7%
Content development for meetings	48.4%	32.3%	19.4%

Figure 6 - How do you think destinations and suppliers can play a role in the future of your association?

Managing Risk

It is clear that moving forward there will be a need for all organisations in all sectors to manage risk. This is not a scenario that is unique to the meetings industry – many of our risks will reflect those of other sectors whilst many will be unique to the world of travel, conferences and face to face communication. It comes as a surprise therefore to find out that only 56% of respondents have so far adjusted crisis management plans for their events – although a further 22% are in the process of doing so.

Some associations report that future risk management processes are now a part of their bidding process. Based on anecdotal evidence it is something we expect will increase as more documents are updated for future events in line with emerging practices.

The COVID-19 crisis has created questions about many things and associations are therefore planning more heavily than ever before around all types of risk – not just the current pandemic. Diversification of income streams is clearly a popular route for many as it spreads risk beyond just events without reliance on the likes of Force Majeure and insurances policies that are now increasingly rare. In those instances where insurance does exist there is clearly a diverse attitude to responsibility and accountability for attendees who contract COVID-19.

- No-one accountable 38%,
- The association 14%,
- The venue 9%

Most though feel it is situation dependent, with either communicable disease clauses or liability covering the risk to the association itself.

Most associations feel that mitigation is the best way forward, with 76% implementing systems where delegate will sign up to standard practices / behaviors in line with globally recommended health and safety measures whilst attending conferences. Should someone show signs of COVID-19 during an event 64% believe the response will be part of their risk

assessments and planning, whilst 8% feel the venue should be responsible and 9% the delegate in question.

Conclusion

Above all else it is clear that the COVID-19 situation is dynamic and fast moving – creating challenges for all sectors. This is reflected throughout associations representing those sectors and their short, mid and long-term approaches to their meetings and conference portfolios.

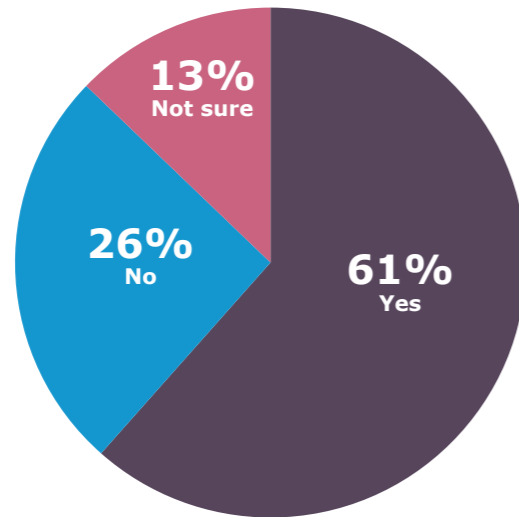
Clearly there is volatility in the market and a need to innovate and create solutions. COVID-19 has taken the previously niche concept of digital and hybrid events – turning them into everyday mainstream occurrences.

For the long-term benefit of all we need to work together, we need to work in partnership, we need to be flexible. Venues and destinations must appreciate the financial needs of their clients if they are to survive, whilst clients must equally understand that without their long term support the venues and destinations cannot survive.

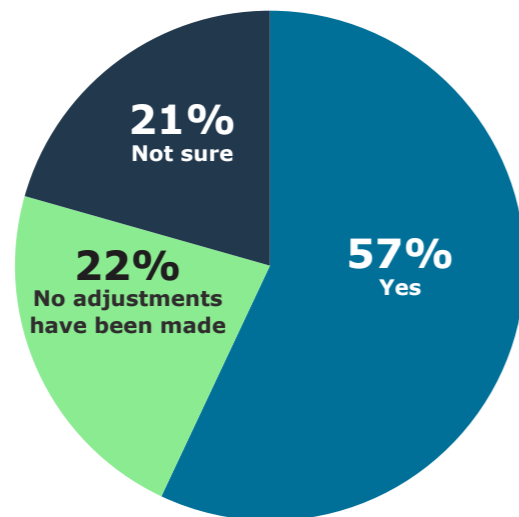
Working together to identify new strategies, new working practices and new technical solutions is the best way forward for the whole industry. All the respondents clearly accepted and believed that meetings offer big value in terms of both knowledge and finances – and there is an opportunity for that to grow if we all work together for a successful future.

Appendix of detailed answers

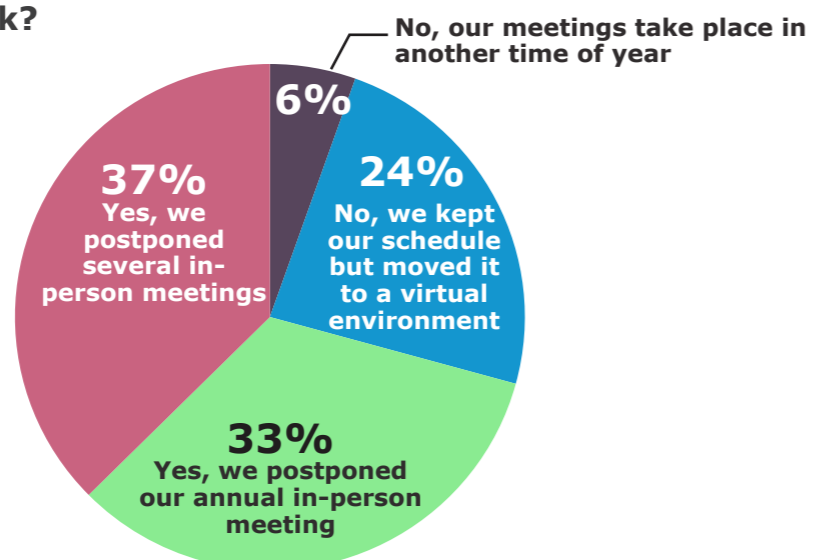
Do you have crisis management plans in place for your meetings?



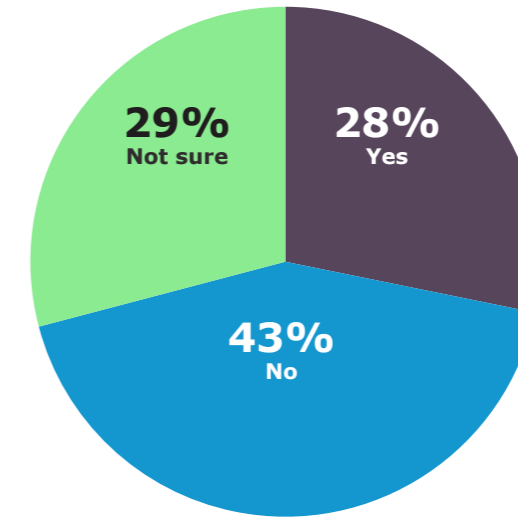
Have you adjusted your crisis management plans for your meetings?



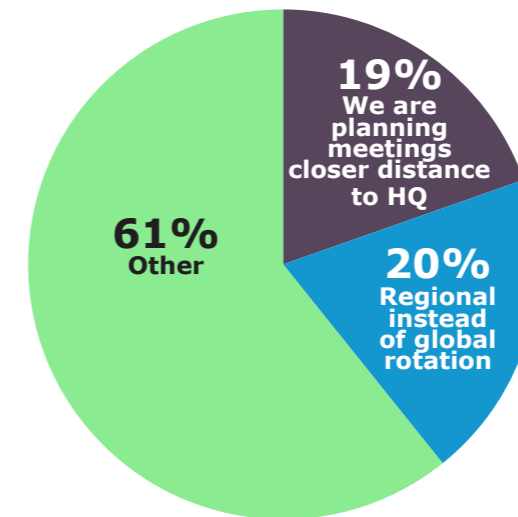
Were you forced to change your meetings schedule because of COVID-19 outbreak?



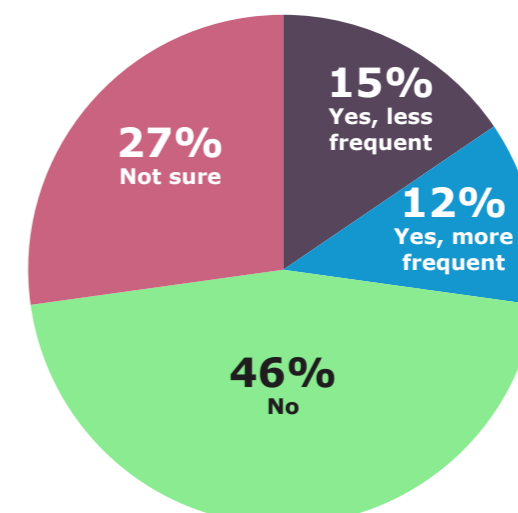
Will you change the rotation pattern of your meetings?



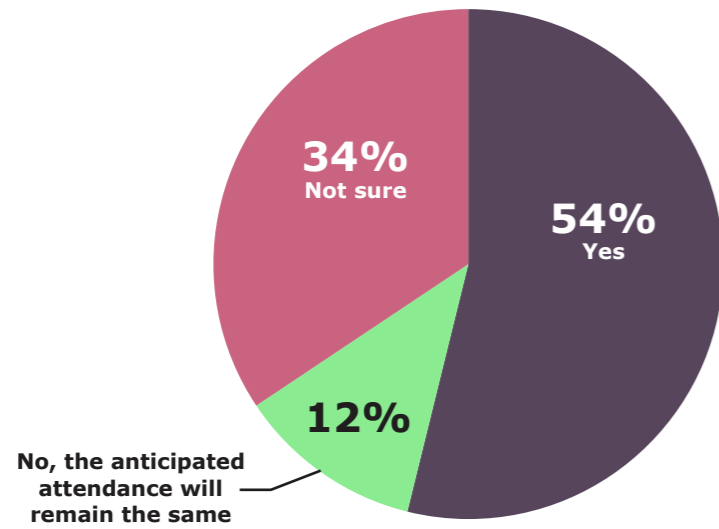
If yes, how will this change?



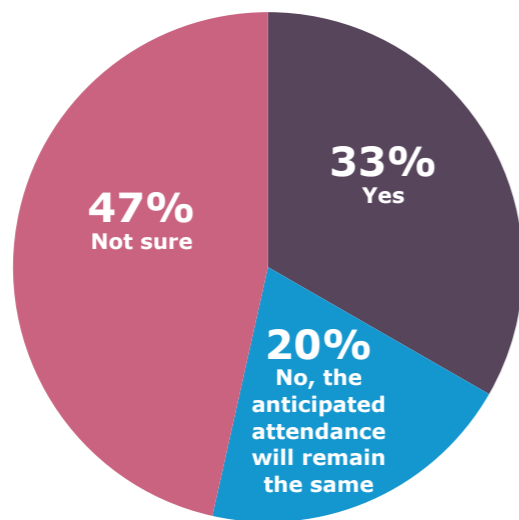
Will you change the frequency of your meetings?



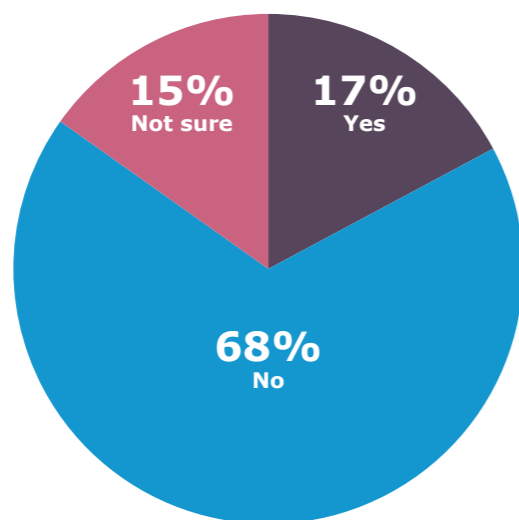
Are you anticipating smaller attendance figures in 2020?



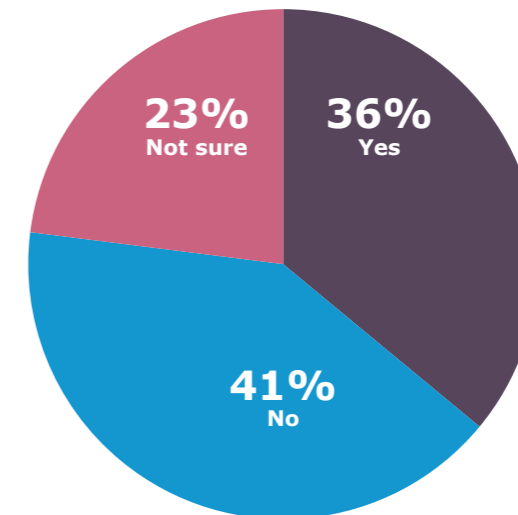
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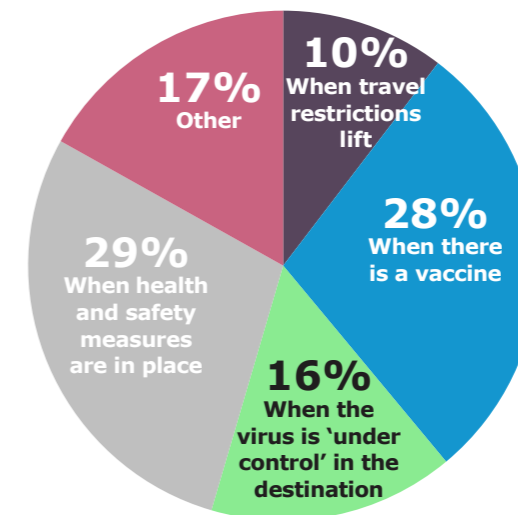
Are you anticipating more regional meetings in 2020?



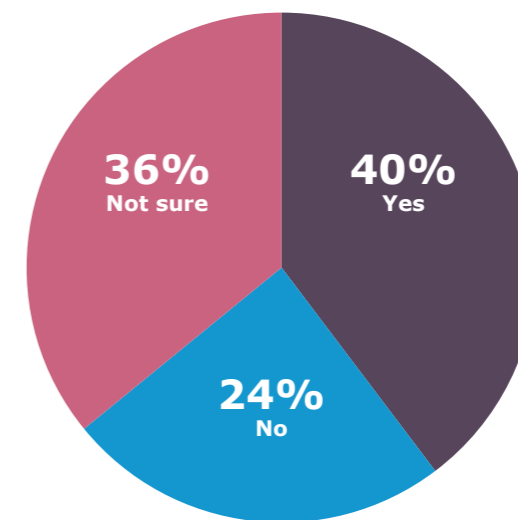
Are you anticipating more regional meetings in 2021?



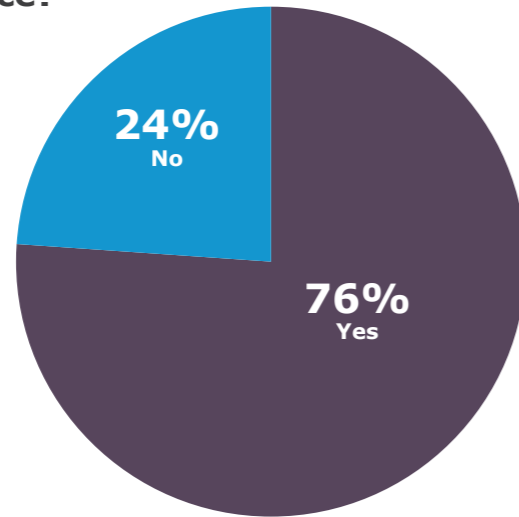
When are your members saying that they are happy to travel to a meeting?



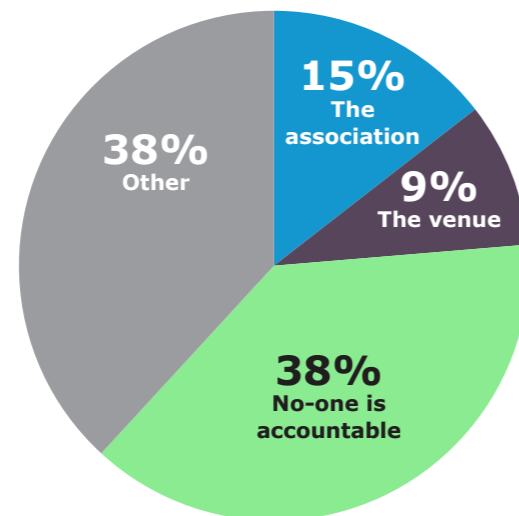
Are your member organisations considering event insurance for their next meeting?



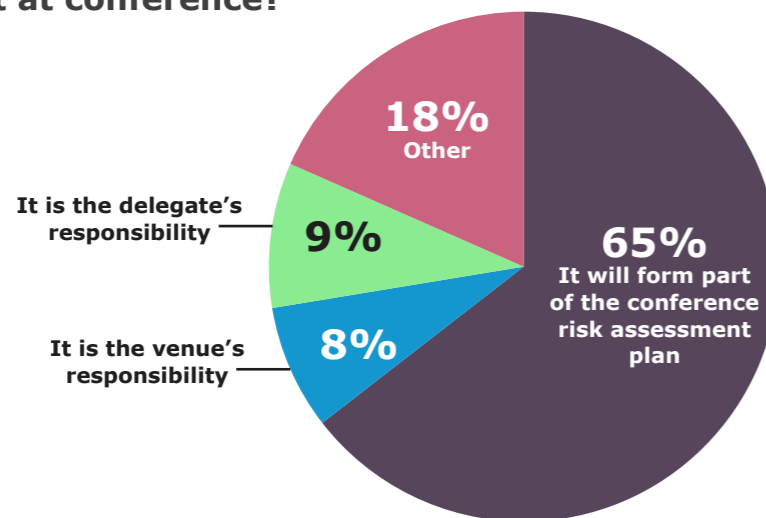
Will you ask your attendees to sign up to standard practices/ behaviours that fit with appropriate health and safety measures while at a conference?



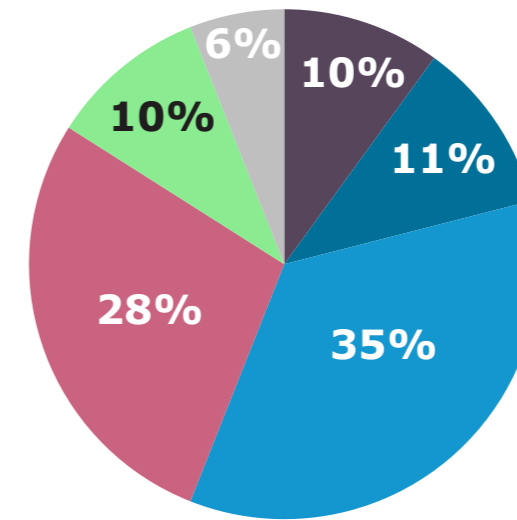
From an insurance perspective, who is accountable if an attendee contracts COVID19 while attending a conference?



How are you planning to deal with someone who shows symptoms whilst at conference?

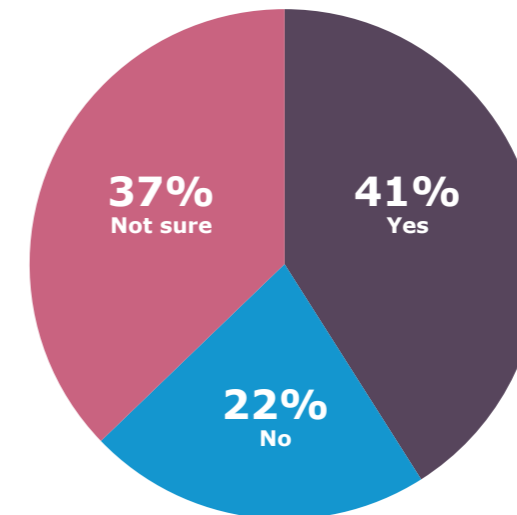


Will technology change the way you conduct meetings and if yes how (Mark any that apply)?

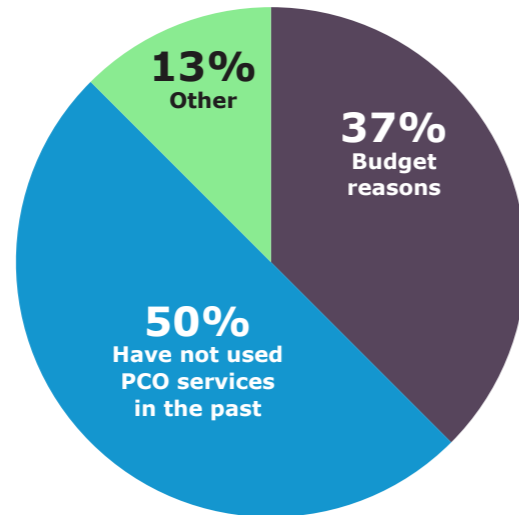


- Will invest in professional production of digital elements for future events 10%
- Will source high quality streaming options for limited sessions (i.e. only keynotes) 11%
- Will add hybrid elements to all events or some events 35%
- Will use only low cost solutions to support virtual/hybrid elements (i.e. Zoom, Webex, GoToMeetings) 28%
- Technology will not change how we will conduct our meetings in the future 10%
- Other 6%

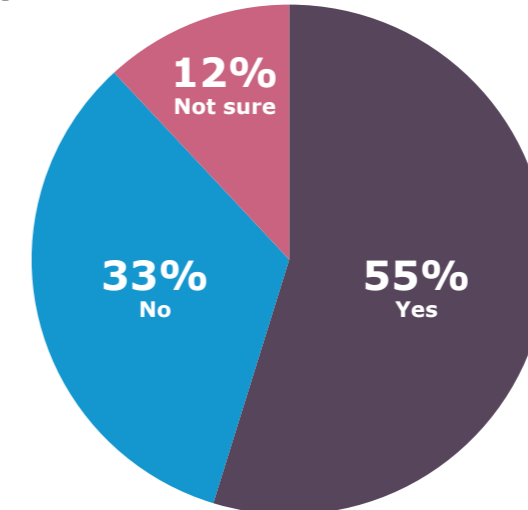
Will you use services of Meetings Management companies in future?



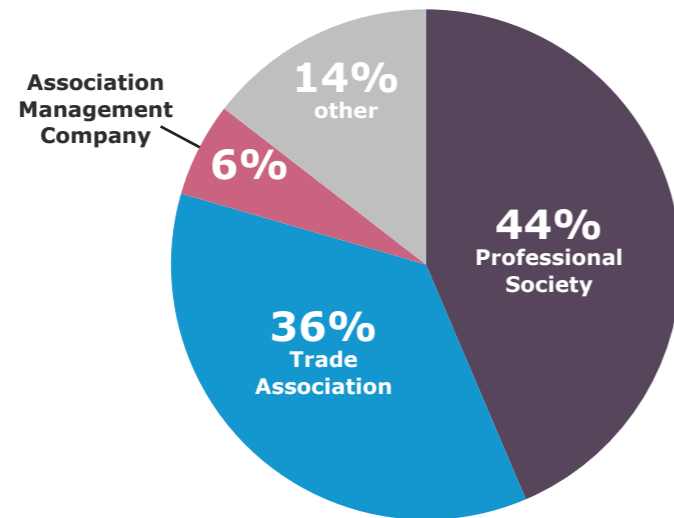
If no – please indicate main reason for your decision:



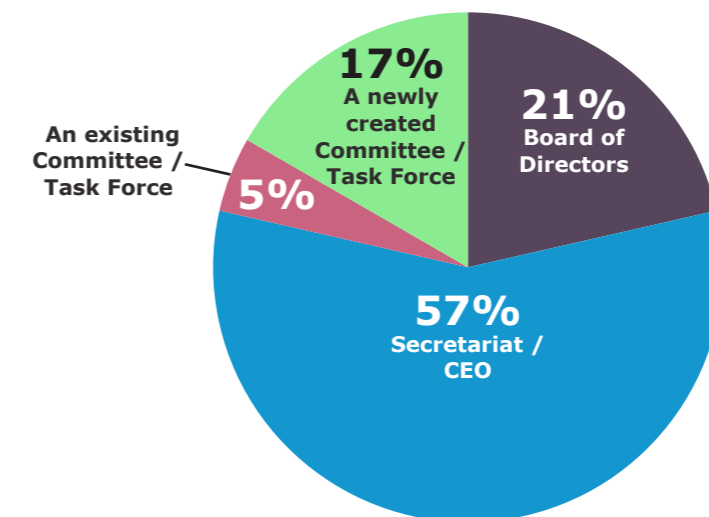
Do you currently have crisis management plans in place for the day to day operation of your association?



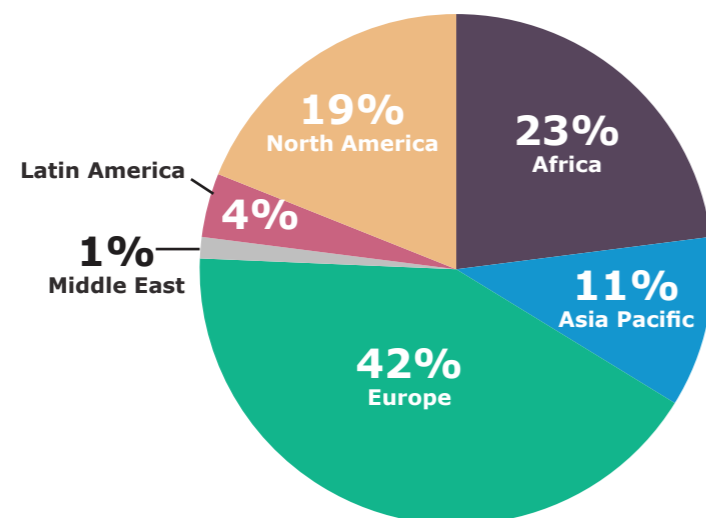
Is your association:



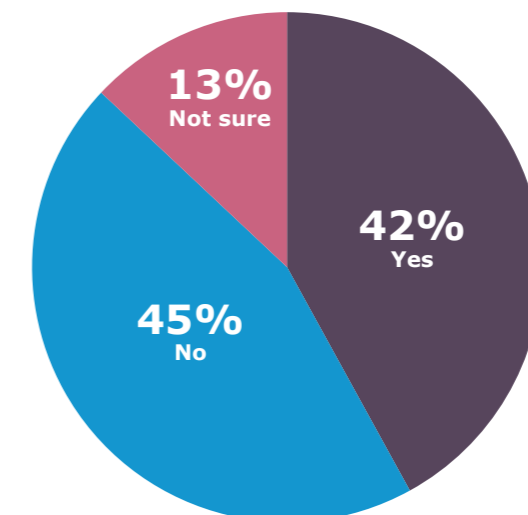
Who is currently the main body responsible for response to COVID-19 outbreak within your organisation?



Where is your head office secretariat based?



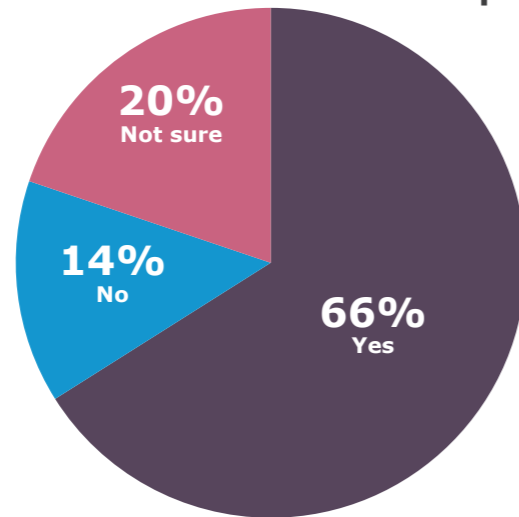
Does your annual budget include a contingency?

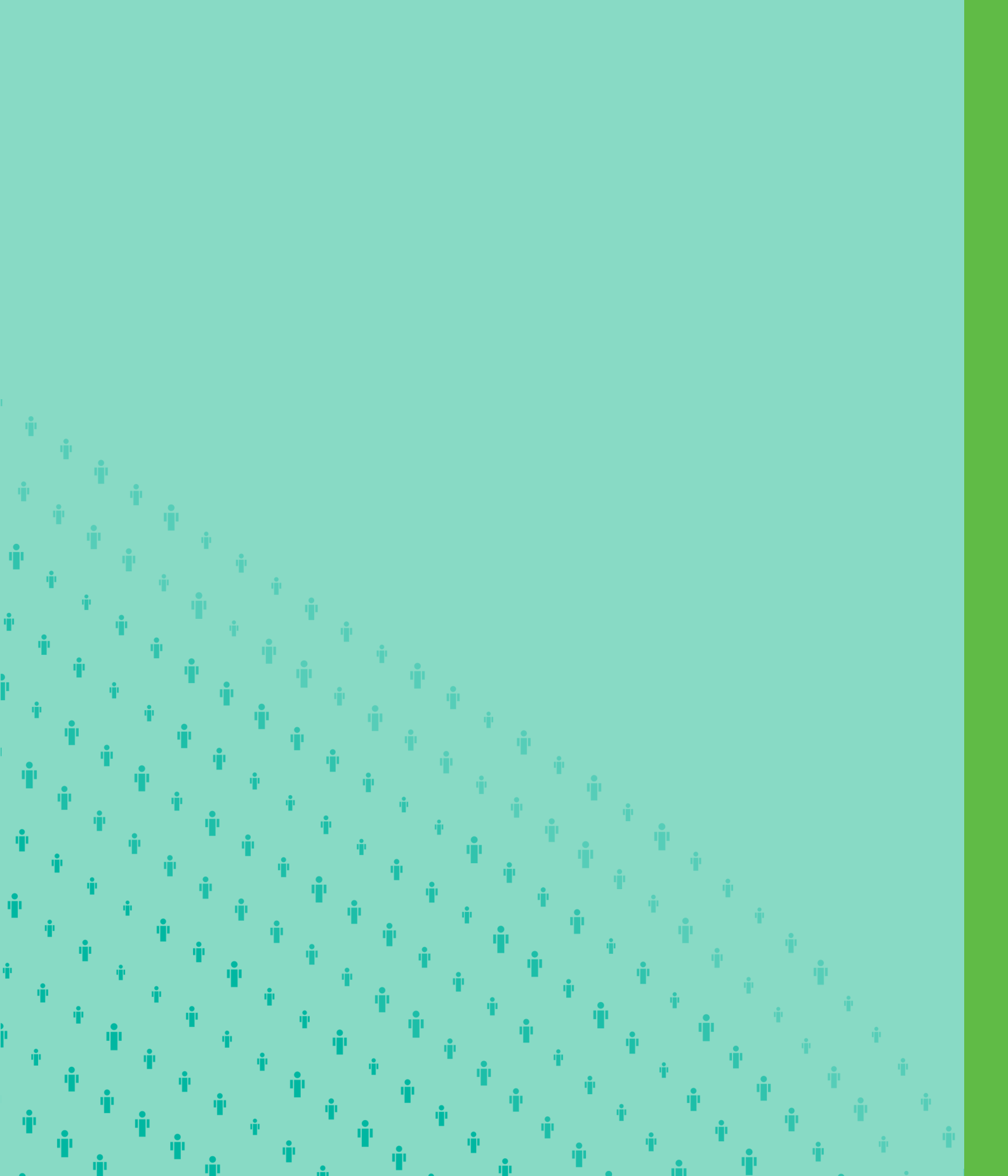


How does your organisation obtain sponsorship?



Do you think the impact of the COVID-19 crisis will fundamentally change how associations and their members operate in future?





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