Event Organizer Trends & Perspectives

AIPC
EXCELLENCE IN CONVENTION CENTRE MANAGEMENT

2019

Survey of Event Organizers Around the World

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Introduction

Event Organizer Trends & Perspectives: Survey of Event Organizers Around the World

The International Association of Convention Centres and Access Intelligence Research & Consulting worked together to study what leading event organizers around the world require from venues and convention centres, and how these trends and requirements are changing. The goal has been to analyze how AIPC members can better serve their key event clients and their attendees, delegates, exhibitors and sponsors.

The report includes insights and benchmarks on:

- Event Organizers' Venue Requirements
- Growth Strategies and Outlook
- How Event Management Groups are Changing
- How Attendees and Exhibitors are Changing
- Event Organizer and AIPC Member Comparisons

The event organizer statistical data is presented for all the respondents as well as for only the respondents that have at least one event with more than 2,500 attendees. There are also two sections of the report that compare the findings of similar questions posed to both event organizers and AIPC members in the 2019 AIPC Member Survey conducted earlier this year.

AIPC and Access Intelligence conducted the survey of event organizers around the world between April and June 2019. The survey received responses from 218 event management organizations.

AIPC and Access Intelligence thank all of the respondents for their invaluable contributions to this study.

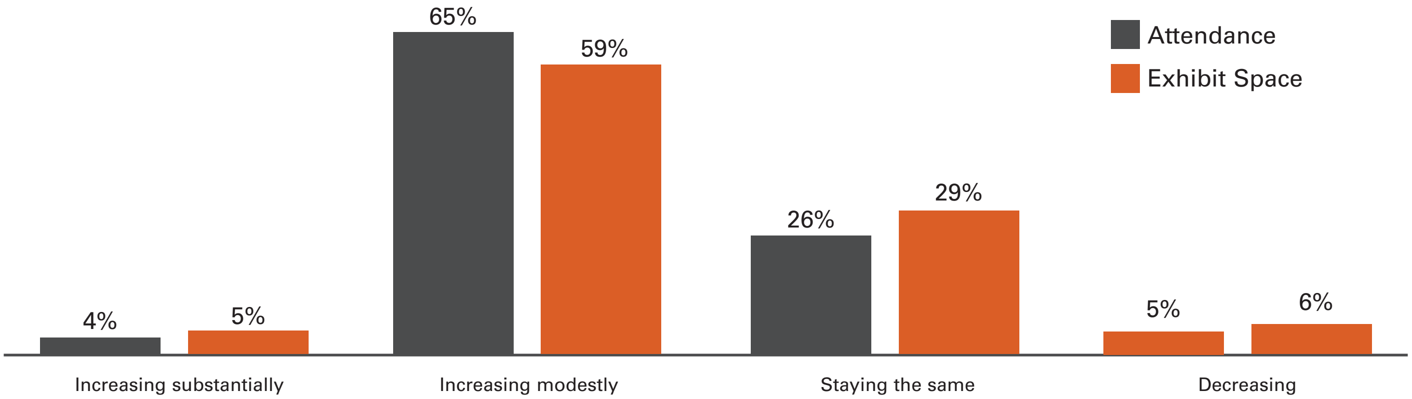
Executive Summary

Some of the key findings and insights from the survey of event organizers from around the world are presented in this summary section. Key quotes on the main challenges and opportunities seen by event organizers are also provided.

Key Insight #1 – Event Organizers Expect Modest Attendance and Exhibit Space Growth Over the Next Few Years

Modest growth is expected, with a slight edge seen on the attendance side. A total of 69% of event organizers expect attendance at their key events to increase over the next few years compared to 64% that forecast total exhibit space demand will increase over the same time period.

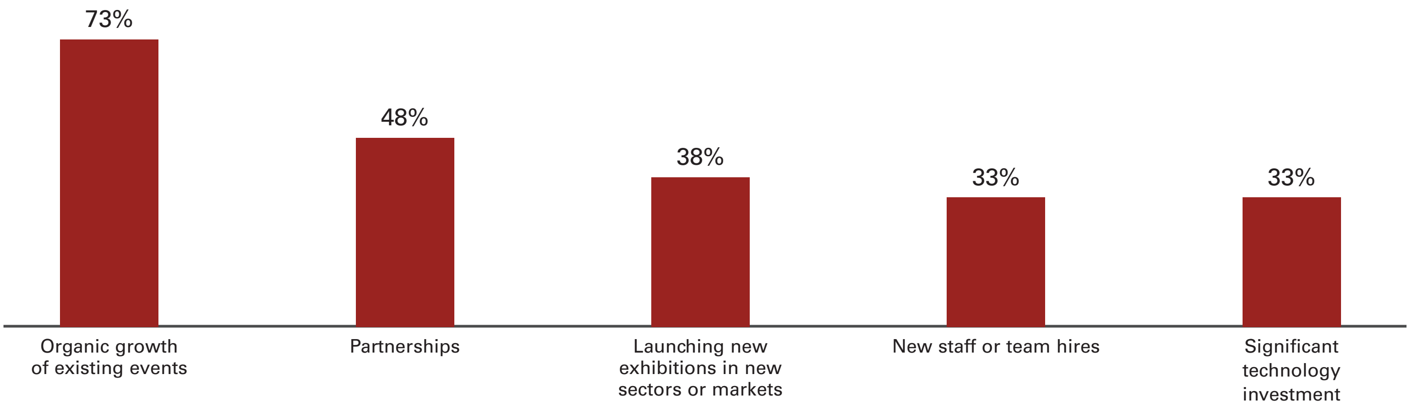
Growth Outlook Over Next Three to Five Years – All Event Organizers



Key Insight #2 – Event Organizers' Growth Strategies Focus on Partnerships and Launching Exhibitions in New Industry Sectors

Besides organic growth, to drive growth event organizers are focused on partnerships with other organizations or event organizers as well as launching exhibitions in new market sectors. The chart below provides the top five growth strategies for event organizers that have at least one event with more than 2,500 attendees.

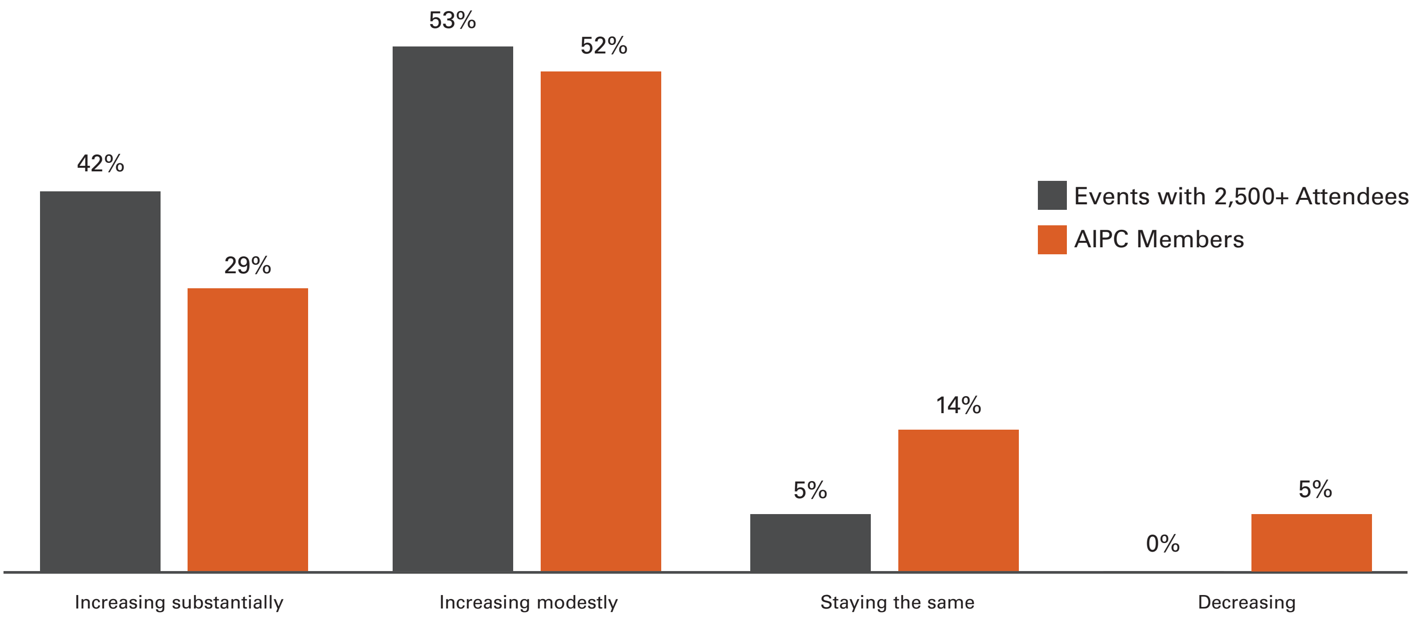
Top Five Growth Strategies



Key Insight #3 – Event Organizers Expect Strong Venue Telecommunications, Internet and Technology Services Demand Growth – and Stronger Demand than AIPC Members

The outlook for venue telecommunications, internet and technology services demand growth is strong. In fact, event organizers are forecasting stronger demand in these areas then AIPC Members – 42% of event organizers expect substantial demand increases in this area compared to 29% of AIPC members. Centres may not fully realize the extent that event organizers expect substantial technology and telecommunications demand over the next few years.

Venue Telecommunications, Internet and Technology Services Demand Growth Outlook

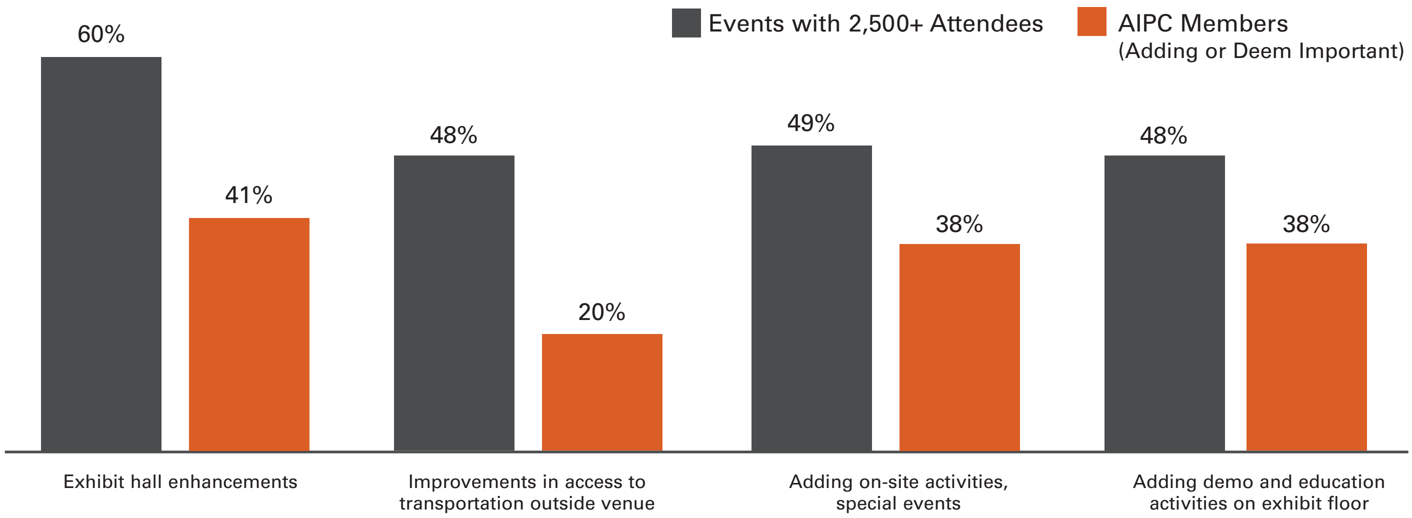


Key Insight #4 – Finding Open Venue Dates is the Top Risk to Growth for Event Organizers with Large Events

Nearly half of event organizers with at least one event with over 2,500 attendees say their top risk to growth is the challenge of finding open dates in the venues of their choice. That lack of venue open dates is a key risk is a sign the convention centre business, overall, is in a good place. Although it suggests some venues may need to expand their facilities. Overall, for all event organizer respondents including smaller groups, the top three risks are hotel availability, lack of venue open dates, and exhibitors questioning ROI.

Key Insight #5 – There are a Number of Important Disconnects on Key Issues When Comparing the Event Organizer and AIPC Member Survey Findings

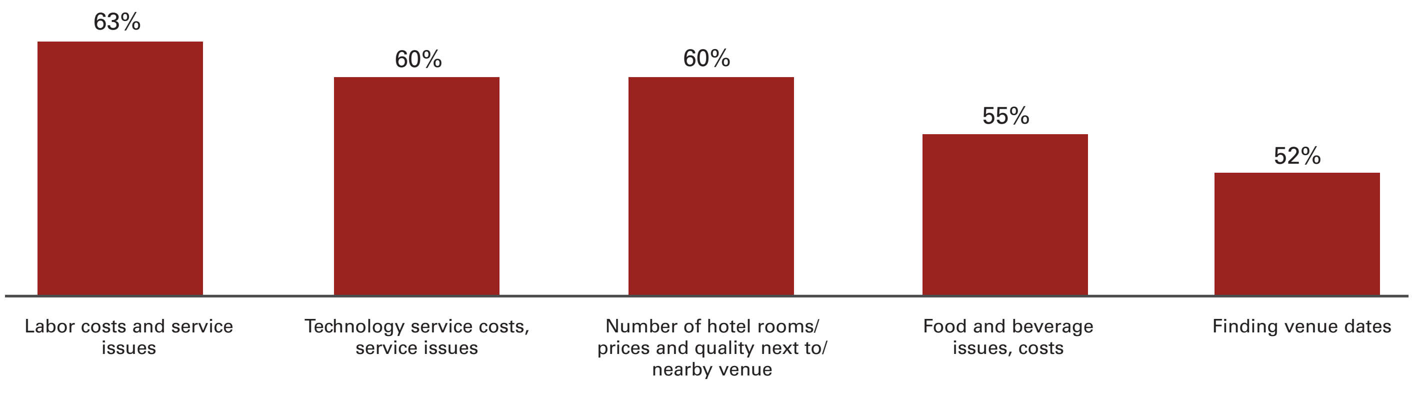
Event organizers want more enhancements and changes than AIPC members realize related to exhibit hall capabilities and functionality and access to transportation outside centres. Meaningful gaps are shown in the chart below.



Key Insight #6 – Event Organizers' Current Venue-Related Challenges

The survey asked event organizers to indicate their current venue-related challenges. The top five venue challenges ranked by the event organizers with larger events are in the chart below. Arguably, two of these top five may be out of the direct control of centre management, i.e., labor costs and service issues and hotel capacity next to the venue. For example, often event organizer and exhibitor labor costs are controlled by contractors or unions. As noted in Key Insight #4 above, about half of event organizers are challenged to find open venue dates, which suggests that the centre business conditions in many regions of the world are strong.

Large Event Organizers' Top Five Current Venue-Related Challenges



Event Organizers Explain Their Biggest Challenges

- "Consolidation within some of our markets as well as major corporations doing their own events."
- "Increasing competition from other events."
- "Showing true ROI and value add for events and meetings."
- "Overall costs, but especially costs tied to food and beverage, internet and audio-visual."
- "Attracting peripheral markets."
- "Predicting what the younger generation wants and what's important to them."
- "Sustained pressure to keep doing more with less. Delegates expect more but want to pay less."

Event Organizer Quotes on Opportunities

- "Developments in interactive attendee engagement technology."
- "One-on-one programs, higher touch matching of buyers and sellers."
- "Partnerships with other event organizers, associations and groups to add critical-mass and additional, related industry audience."
- "Reshaping the experience of attending."
- "Smaller, quicker to market events."
- "Understanding buyers better."

Event Organizers on How Convention Centres Need to Change

- "Better customer service and treating us like a partner."
- "Evolution, by adapting the business event space to be on par with what is available in the consumer space (i.e., wifi, technology)."
- "(Centres have) to provide services that everyone expects in their daily life (bandwidth, quality/choice F&B, power/usb, customer focused/personalized services), immediacy in response time."
- "More comfortable, more natural lighting, flexible work and meeting space, healthier food choices."
- "The new convention space should be one that offers scale-able exhibition space, has a feel that brings nature into play (outdoor space, green, green production), has a seamless arrival and departure system for transportation and registration and takes overall wellness of attendee as paramount."

The findings in this summary provide a small portion of the insights from the study. The rest of the report provides more data, analysis and benchmarks.

Executive Summary

I. Event Organizers' Venue Requirements

This section covers event organizers' venue requirements with a focus on their current venue-related challenges, expected trends and changes going forward, and the venue areas they feel need the most enhancement and investment.

Event Organizers' Current Venue-Related Challenges

Survey Question: ***What are your current venue-related challenges as an event organizer / meeting planner?***

For the larger event organizers, those with events with more than 2,500 attendees, the top venue challenges today are labor costs and service issues, technology service costs and service issues, and finding venues with an ample number of hotel rooms at the right price points and quality nearby.

	All Events %	Events with 2,500+ Attendees
Food and Beverage issues and/or costs	60%	55%
Labor costs and service issues	57%	63%
Technology service costs and service issues	55%	60%
Meeting rooms, space and quality	49%	43%
Number of hotel rooms/prices and quality next to/nearby venue	46%	60%
Exhibit space rental rates	43%	45%
Finding dates	43%	52%
Finding venues	33%	28%
Exhibit space size and quality	31%	40%
General session space and quality	28%	29%
Parking	18%	22%
Signage issues	16%	20%
Outdoor space	14%	11%
Competitive events booking same venue	13%	14%
Marketing-related issues	9%	9%
Registration and ticketing issues	9%	3%
Other	6%	6%

Insight: Seven Venue-Related Areas and Issues are Considered to be Challenges to Over 40% of Event Organizers

There are seven areas selected by over 40% of the total base of event organizer respondents as challenges. Centres may need to review their approach to a number of these areas identified as key challenges to event clients in the survey.

How Venue Requirements are Expected to Change Over the Next Few Years

Survey Question: ***How do you expect your overall event needs related to venues to change over the next few years?***

The main client changes related to venues are expected to be more technology demand, better signage and higher quality F&B – and improved overall venue experience and ambiance. Also important, especially to the larger event organizers, are more meeting room space, green and environmental sustainability programs, improved signage and way-finding, and improvements in access to transportation outside venues.

	All Events %	Events with 2,500+ Attendees
Enhanced technology and telecommunications needs, bandwidth	61%	59%
More overall multi-function capabilities and venue flexibility	51%	45%
Higher-quality food and beverage services	49%	50%
Improved overall event and venues experience ambience, aesthetics	45%	50%
More meeting room space	43%	45%
More green and environmental sustainability initiatives	43%	45%
Improved signage and way-finding	42%	52%
Enhanced audio-visual services needs	41%	36%
Higher quality meeting rooms	39%	30%
Improvements in access to transportation at venues (taxis, shuttle buses, etc.)	37%	48%
More exhibit space required	35%	44%
More general session space	31%	30%
More attendance promotion assistance	29%	35%
More pre-function space	26%	26%
More parking	20%	27%
More ballroom space	19%	11%
More use of lecture theatre(s) with fixed seating	7%	8%
Other	4%	8%

Key Venue Areas that Need Enhancement or Investment

Survey Question: ***Which spaces and areas in the most important venue you use do you see the most need of enhancement or investment?***

For the event organizers with larger events – specifically with events with over 2,500 attendees – the main venue areas that need enhancements are exhibit halls, technology infrastructure, meeting rooms and venue connections to transportation such as shuttle bus and taxis/ride-share services.

	All Events %	Events with 2,500+ Attendees
Technology infrastructure or services	51%	52%
Meeting rooms	49%	43%
Exhibit halls	43%	60%
Venue connections and links to transportation, such as shuttle bus and taxi areas	37%	43%
Client-facing food service areas and restaurants	31%	31%
Pre-function spaces	29%	28%
Ballroom(s)	28%	23%
Venue connections and links to hotels or other key buildings	28%	32%
Loading dock and related areas	24%	26%
Signage	24%	26%
Outdoor, outside areas	18%	12%
Other concession areas and store-fronts	14%	20%
Business centre	10%	9%
Kitchen(s)	7%	11%
Other	5%	8%

Venue Service and Cost Areas

Survey Question: ***In which of the following venue service and cost areas do you expect to see an increase or decrease in terms of your total spending in 2019 compared to 2018?***

The table directly below provides the expected venue cost areas for the entire set of event organizer respondents in terms of total spending increases this year. The largest percentages of respondents expect to spend more in 2019 on the following:

- Food and beverage services
- Telecommunications, internet and technology services
- Audio-Visual services

All Events %	Increase	Decrease	Stay the Same	Not Applicable
Exhibit hall rent	51%	5%	36%	8%
Ballroom and meeting room rent	40%	3%	47%	10%
Food and beverage services	78%	4%	17%	1%
Audio-Visual services	68%	6%	24%	1%
Event services including equipment rental	65%	3%	27%	5%
Telecommunications, internet and technology services	72%	7%	20%	1%
Parking expenses	34%	6%	34%	27%
Signage and/or advertising	45%	7%	45%	3%
Security on-site	52%	2%	40%	6%

The larger event organizers expect to spend more primarily on:

- Food and beverage services
- Telecommunications, internet and technology services
- Event services including equipment rental

Events with +2,500 Attendees	Increase	Decrease	Stay the Same	Not Applicable
Exhibit hall rent	58%	2%	35%	5%
Ballroom and meeting room rent	41%	0%	46%	13%
Food and beverage services	80%	5%	15%	0%
Audio-Visual services	70%	8%	20%	2%
Event services including equipment rental	75%	3%	20%	2%
Telecommunications, internet and technology services	76%	6%	17%	0%
Parking expenses	47%	5%	27%	20%
Signage and/or advertising	46%	7%	46%	2%
Security on-site	62%	3%	35%	0%

Venue Discounts and Free Services

Survey Question: ***Currently, do you receive large discounts or free services from convention centres for any of the following venue service areas, for at least one of your key events?***

Event organizers indicate they most often receive large discounts of over 25% in the following venue service areas: audio-visual services, event services including equipment rental, and food and beverage services. The service areas where the largest groups of events receive free services are parking, signage, and ballroom and meeting room rent.

All Events %	Large Discount (Over 25%-Off)	Free Services
Exhibit hall rent	73%	29%
Ballroom and meeting room rent	55%	47%
Food and beverage services	83%	17%
Audio-Visual services	96%	4%
Event services including equipment rental	85%	15%
Telecommunications, internet and technology services	78%	30%
Parking expenses	38%	67%
Signage and/or advertising	52%	57%
Security on-site	54%	46%

Events with 2,500+ Attendees	Large Discount (Over 25%-Off)	Free Services
Exhibit hall rent	86%	18%
Ballroom and meeting room rent	64%	36%
Food/beverage services	80%	20%
Audio-Visual services	94%	6%
Event services including equipment rental	75%	25%
Telecommunications, internet and technology services	85%	23%
Parking expenses	50%	60%
Signage and/or advertising	69%	38%
Security on-site	71%	29%

Event Format and Requirement Changes that May Require a Re-Assessment of Centre Facilities and Services

Survey Question: ***What changes in event formats and requirements have you seen that may require a re-assessment of the facilities and services your key convention centres currently offer?***

Key themes:

- Enhanced audience engagement
- Digital communications, media and content
- Remote participation via digital
- New learning formats
- Enhanced food and beverage services
- Lighting improvements
- Improved transportation access outside venues
- Security, both physical in-venue and digital/cyber
- Venue technology and bandwidth enhancements

Select respondent comments:

- “Availability of live feed access for remote participation.”
- “Building security not a focus in original design, lots of access points from outside.”
- “Exclusive F&B providers driving up cost with poor service, especially compared to international events.”
- “Combined educational sessions on the trade show floor requires options to separate sound and activities, without distraction; renewed F&B options, including scheduling of breaks, including them during events.”
- “Cost of exclusive services, F&B, parking, public transit and vehicular access.”
- “Customer service.”
- “Demand for interactive food and beverage experiences which requires more space and higher level of food creativity and servicing, offering integrated experiences that extend beyond sessions and exhibit hall spaces.”
- “Desire for more unique venues (non-hotel or convention center).”
- “Different learning formats/ seating arrangements have us relooking at space requested, and how many we can fit in session rooms with different room sets/ learning formats.”
- “Dramatic increases in ancillary charges and we are trapped, in that we are often not able to pass on the charges to exhibitors.”
- “Events will merge into one common format category: exhibition + conference + festival. Venues will have to adapt accordingly.”
- “Exhibit hall experiences need to be expanded, with more activities that embrace buyers.”
- “Exhibit space increasing beyond what we can secure, date/pattern shifts, attendance keeping pace with exhibit growth.”
- “Extended load in / load out periods prior to or after our scheduled event (overlap becoming more frequent).”
- “Increased internet usage and higher bandwidth needs to support attendees with multiple connected devices.”
- “Less exhibitors means less space required, however we will still need space for group meals, etc.”
- “Less marketing opportunities leading to less attendance.”
- “Less plenary sessions. more focus on small meetings.”
- “Lighting in rooms for education sessions is not focused on where a stage/speaker will be. Lighting options for screens and podium are limited; streaming sessions is less than ideal under these conditions.”
- “More audience engagement through digital methods require much better wifi, internet, and bandwidth.”
- “More behind-the-scenes meetings during the actual conferences takes away from session rooms.”
- “More demonstration and learning areas on exhibit floors as well as networking and food and beverage events.”
- “More shorter sessions.”
- “More smaller spaces.”
- “More technology available to all, e.g., wifi.”
- “Need bandwidth for use of cell phones and iPads.”
- “Need for accessible venues and transportation.”
- “Need parking close to convention center or provide shuttle service for attendees
- “New ideas, need flexibility.”
- “Security requirements.”
- “Shorter version of conference - 2 days instead of 3.”
- “Space is shrinking and need the flexibility to downsize without penalty.”
- “Sustainable meals and recycling.”
- “The costs keep going up and we cannot continue to raise our ticket prices.”
- “Upgrades to facilities, reasonable prices; especially hotel sleeping room rates.”
- “We are moving to more concurrent sessions so requires location with more intermediate sized meeting rooms in addition to main ballrooms.”

II. Growth Strategies & Outlook

This section covers growth strategies and event organizers' outlook in a number of areas.

Event Organizers' Growth Strategies

Survey Question: ***Which of the following strategies and tactics are you and your team focusing on to drive growth?***

Partnerships are important to nearly half of event organizers. A key question for centres is: *How can you help your clients manage these partnerships on-site, and launch new events?* For event organizers with over 2,500 attendees the main strategies, besides organic growth, are partnerships, launching exhibitions in new sectors or markets, new hires, and significant technology investment.

	All Events %	Events with 2,500+ Attendees
Organic growth of existing events	69%	73%
Partnerships	49%	48%
Launching new exhibitions in new sectors or markets	32%	38%
New staff or team hires	29%	33%
Launching new exhibitions in existing sectors and markets	28%	30%
Significant technology investment	28%	33%
Other businesses or revenue streams besides exhibitions and events	24%	25%
Launching new conferences or meetings with little or no exhibition space in existing sectors or markets	22%	25%
Launching new conferences or meetings with little or no exhibition space in new sectors or markets	18%	16%
Mergers and acquisitions	13%	13%
Other	3%	3%

Key Insight: Lack of Open Dates is an Important Issue for Event Organizers

That lack of venue open dates is a key risk is a sign that convention centres, overall, are in a good place. Although it suggests some venues may need to expand their facilities.

Top Risks to Growth

Survey Question: ***What are the top risks to growth related to your event business?***

Overall, for all respondents, the top three risks are hotel availability, lack of venue open dates, and exhibitors questioning ROI.

	All Events %	Events with 2,500+ Attendees
Hotel availability and pricing	48%	43%
Lack of venue open dates	45%	49%
Exhibitors and sponsors questioning exhibition and event ROI	45%	43%
Overall economic strength	41%	44%
Growing competition from other event organizers	34%	36%
Government policies, politics	21%	24%
Replacement of events with online alternatives	19%	14%
Air travel issues (pricing, availability, airlift, route access, etc.)	18%	18%
Immigration or visa requirements limiting access	18%	19%
Increases of corporations and individuals using digital media and communications	13%	11%
Government / corporate restrictions on events and meetings	12%	8%
Other	5%	5%

Key Economic and Political Issues Impacting Event Business

Survey Question: ***Over the past year have any of the following economic or political issues significantly changed your business performance, attendance or client sales, or growth outlook – or do you see these as potential future threats?***

The number one economic or political risk currently impacting event organizers is seen as cyber and data security related. This is followed by business disrupters such as AirBnB and online hotel booking platforms.

All Events %	Currently Impacting	Potential Future Impact
Increasing cyber and data security risks	62%	60%
Business disrupters i.e., AirBnB, online hotel booking platforms	58%	65%
Increasing event security risks	54%	62%
New US “America First” implications	53%	60%
US targeted immigration and travel restrictions	47%	75%
Increasing global or national security risks	46%	70%
Currency value fluctuations	45%	69%
Changes to trade agreements, globalization	33%	73%
UK Brexit	25%	81%
News about Bank/Financial institution solvency	11%	91%
Government / corporate restrictions on events and meetings	12%	8%
Other	5%	5%

Events with 2,500+ Attendees	Currently Impacting	Potential Future Impact
Business disrupters i.e., AirBnB, online hotel booking platforms	66%	61%
Increasing cyber and data security risks	61%	61%
New US "America First" implications	52%	59%
Increasing event security risks	52%	63%
US targeted immigration and travel restrictions	49%	74%
Increasing global or national security risks	42%	71%
Currency value fluctuations	39%	78%
Changes to trade agreements, globalization	36%	68%
UK Brexit	23%	81%
News about Bank/Financial institution solvency	14%	86%
Government / corporate restrictions on events and meetings	12%	8%
Other	5%	5%

Other Major Economic or Geopolitical Issues

Survey Question: ***Are there other major economic or geopolitical issues or factors that you feel have or will introduce uncertainties for your event business over the next few years? (Or if you see positive impact please note as well.)***

Key themes from the write-in responses:

- Audience demographic changes
- Governmental and political changes and uncertainty
- Digital privacy rules and issues
- Competition

Select respondent comments:

- "Aging demographics of business owners that exhibit."
- "Competitive pressure in already struggling industry."
- "Continuing digitization of everything. All industries are being shifted to software vs. hardware base, which is less conducive to traditional exhibitions. Artificial Intelligence and robotics are driving more jobs out of the economy."
- "Government restricting travel to cities/states with discriminatory laws/rules."
- "Government travel restrictions on federal employees and military."
- "GPDR."
- "Healthcare decisions by the government."
- "Political stability."
- "State budget changes resulting in less money for public services entities professional development and continuing education."
- "Talking up recession will curb event attendance."
- "The ability to have wifi in all locations. Parking."
- "The privacy laws in Europe and structure of capturing information on registration sites."
- "The strong economy has helped as far as attendance but makes it tough to negotiate lower rates at the hotels."
- "Too many visa applications to USA being rejected by US Embassy staff especially in Asia."
- "Transportation costs are a critical issue with companies, traveling to events."
- "Virtual options challenge in person events and are significantly less costly."
- "Weather issues; climate change impacts." Attendance Outlook

Attendance Outlook

Survey Question: ***Do you anticipate total attendance figures at your most important event increasing or decreasing over the next three to five years?***

The majority of event organizers expect modest attendance growth at their key events over the next three to five years. The larger groups with over 2,500 attendees are a little more optimistic on attendance growth than the entire set of respondents.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	5%	4%
Increasing modestly	60%	65%
Staying the same	28%	26%
Decreasing modestly	7%	4%
Decreasing substantially	1%	1%

Exhibit Space Demand Outlook

Survey Question: ***Do you anticipate your requirements for exhibit space for your most important event increasing or decreasing over the next three to five years?***

Event organizers are just a little less optimistic on the outlook for total exhibit space demand growth when compared to their attendance outlook. Still, a solid majority expect modest growth opportunities ahead for exhibit space expansion.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	4%	5%
Increasing modestly	54%	59%
Staying the same	32%	29%
Decreasing modestly	7%	4%
Decreasing substantially	3%	2%

"Clients want to offer a new kind of experience, and surprise the participants." - AIPC Member

Ballroom and Meeting Space Demand Outlook

Survey Question: ***Do you anticipate your requirements for ballroom and meeting space for your most important event increasing or decreasing over the next three to five years?***

While 10% of all event organizers expect substantial demand growth for ballroom and meeting space over the next few years, 43% say they see modest growth only – and 42% are forecasting using the same amount of space as they do today.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	10%	12%
Increasing modestly	43%	45%
Staying the same	42%	38%
Decreasing modestly	5%	5%
Decreasing substantially	1%	0%

Pre-Function, Atrium and Foyer Space Demand Outlook

Survey Question: ***Do you anticipate your use of pre-function, atrium and/or foyer space for your most important event increasing or decreasing over the next three to five years?***

	All Events %	Events with 2,500+ Attendees
Increasing substantially	10%	14%
Increasing modestly	35%	34%
Staying the same	51%	48%
Decreasing modestly	4%	3%
Decreasing substantially	0%	0%

Audio-Visual Demand Outlook

Survey Question: ***Do you anticipate your needs for on-site audio-visual services for your most important event increasing or decreasing over the next three to five years?***

Audio-visual demand is expected, on a percentage of the market basis, to outpace growth in attendance and exhibit space demand.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	17%	19%
Increasing modestly	48%	45%
Staying the same	35%	36%
Decreasing modestly	0%	0%
Decreasing substantially	0%	0%

Venue Telecommunications, Internet and Technology Services Demand Outlook

Survey Question: ***Do you anticipate your needs for venue telecommunications, internet and technology services for your most important event increasing or decreasing over the next three to five years?***

The outlook for venue telecommunications, internet and technology services demand growth is strong. Forty-two percent of groups with larger events expect substantial increases in demand in this area over the next three to five years.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	39%	42%
Increasing modestly	52%	53%
Staying the same	8%	5%
Decreasing modestly	0%	0%
Decreasing substantially	0%	0%

Food & Beverage Demand Outlook

Survey Question: ***Do you anticipate your needs for venue food and beverage services for your most important event increasing or decreasing over the next three to five years?***

While not as strong as technology and AV, food and beverage demand is expected to grow modestly, according to the event organizers surveyed.

	All Events %	Events with 2,500+ Attendees
Increasing substantially	10%	9%
Increasing modestly	50%	52%
Staying the same	36%	32%
Decreasing modestly	4%	6%
Decreasing substantially	0%	0%

Key Insight: Event Organizers Expect Much Higher Demand for Technology and Telecommunications Services than Centres May Realize

Event organizers are forecasting stronger demand in these areas than AIPC Members – 42% of event organizers expect substantial demand increases in this area compared to 29% of AIPC members. Centres may not fully realize the extent that event organizers expect substantial technology and telecommunications demand over the next few years.

III. How Event Management Groups are Changing

This section analyzes how event organizers are making changes to their event management models and approach to operations.

How Largest, Most Important Events are Changing

Survey Question: ***How are your largest, most important events changing?***

The top areas based on the responses from all of the event organizers are:

- Requiring more telecommunications/internet bandwidth and related services
- Event attendance is growing
- Requiring more meeting room spaces and breakouts
- Requiring higher-quality food and beverage

	All Events %	Events with 2,500+ Attendees
Requiring more telecommunications/internet bandwidth and related services	62%	70%
Event attendance is growing	54%	58%
Requiring more meeting room spaces and breakouts	43%	47%
Requiring higher-quality food and beverage	43%	47%
Number of exhibitors is growing	40%	44%
Events are getting larger in terms of exhibit space requirements	37%	44%
Short events in terms of total number of days	24%	22%
Requiring more ballroom and space for general sessions	24%	17%
Number of exhibitors is declining	18%	17%
Requiring more outdoor areas/spaces	18%	16%
Event attendance is declining	16%	14%
Events are getting smaller in terms of exhibit space requirements	10%	5%
Longer events in terms of total number of days	9%	6%
Other	7%	8%

How Event Management Business Practices are Changing

Survey Question: ***How are your event management business practices changing?***

Event management business practices are changing primarily via increased negotiations with venues, hotels and CVBs, and with more of a focus on event design and ambiance, as well as shorter venue booking windows.

	All Events %	Events with 2,500+ Attendees
Increased negotiations with venues, hotels and CVBs	65%	67%
Focusing more on event design and ambiance	43%	45%
Shorter venue booking windows, booking closer to the event dates	42%	31%
Longer venue booking windows, booking further from the event dates	27%	34%
Requiring attendance promotion assistance	20%	23%
Asking for more public relations assistance and outreach to city and regional leaders	20%	23%
Other	4%	2%

How Event Management Operational Practices are Changing

Survey Question: ***How are your event operational practices changing?***

Comparing all event responses with those with events that have more than 2,500 attendees finds a large difference related to the need for enhanced telecommunications bandwidth. Sixty-two percent of groups with larger events say this is a key operational change compared to 49% of the entire set of respondents. Improving signage and way-finding is also more important to groups with larger events.

	All Events %	Events with 2,500+ Attendees
Focusing more on event experience design and ambiance aesthetics	58%	62%
Enhanced telecommunications bandwidth	49%	62%
On-site event activities and special events	44%	49%
Adding more demonstration and educational activities on exhibit floors	41%	48%
Focusing on improving service provider/vendor management	34%	34%
Enhanced registration and attendee check-in services	34%	32%
Improved signage, way-finding	34%	43%
Enhanced AV services	28%	25%
Using more space and area in venues such as atriums and outdoor space	25%	20%
Improved access to transportation	19%	25%
Training/preparing on-site staff and vendors/partners	18%	23%
Change key event operations-related service providers such as General Service Contractors or event labor providers	15%	18%
Other	5%	6%

"The biggest thing we notice are client's and delegate's changing expectations around experiences and the level of service delivery. With changing demographics, i.e., younger clients and delegates, there is increasingly an expectation around certain inherent standards of service, such as wi-fi and high quality AV, and F&B services." - AIPC Member

Importance of Engaging with Local Community in the Host City

Survey Question: ***How important is engaging your organization and event audience with the local community in the host city or region during your largest, most important events?***

A total of 49% of event organizers say engaging with the local community in their event host cities is very important or important. Not surprisingly, this type of engagement is more important to event organizers with larger events.

	All Events %	Events with 2,500+ Attendees
Very Important	24%	26%
Important	25%	31%
Moderately Important	22%	17%
Somewhat Important	14%	14%
Not Important	15%	12%

How Event Organizers Engage with the Local Community

Survey Question: ***What efforts do you make to connect and engage with the local community?***

Key themes:

- Community service and volunteer events
- Have local outreach team and strategy
- Social media campaigns
- Traditional media outreach
- Work with CVB and local government
- Use local vendors
- Member and/or exhibitor office/facility or plant tours

Respondent comments:

- "Building in social activities."
- "Community Service event at our event benefitting the community we're in."
- "Connections with national trade associations, government, Chambers of Commerce, regional media."
- "Consult / exchange with local committee."
- "Convention and Visitors Bureau and local Government."
- "CSR events or local vendor/small businesses hiring."
- "Embracing and including local vendors, customers, and partners in the planning and execution process."
- "Encourage members to do off site events open to the public."
- "Establish a Local Arrangements Committee who give input into the conference, assist in securing local sponsors, attendees."

- "Getting in touch with associations and visitors directly."
- "Have a local host."
- "Having local teams - having those teams that are at the heart of the communities they serve."
- "Implement volunteer activations at the venue that directly benefit the local community. Use local talent and vendors whenever possible. Donate hard goods (furniture, plants, supplies) and food whenever possible to local organizations."
- "Initially communication with visitors bureau then we try to establish relationship with local government and also mount a local volunteers recruitment campaign."
- "Local charity work."
- "Local community service project each year."
- "Local programs, promotions through advertising and sponsorship opportunities. Invite local officials to the event."
- "Locally sourced food, local craft beers, local entertainment."
- "Marketing, social media, connection to local chapter members."
- "Mostly Facebook. Frequent postings about things of interest and advertising close to event date. Giving away free tickets through media."
- "Online presence, sponsorships."
- "Outreach to local groups like volunteer lawyers for the arts."
- "Partner in local community events."
- "Partnerships with sector based organizations and groups, encourage cross-promotions and participation."
- "PR and local outreach."
- "Pre-con meetings with CVB, Hotel, Facility, inclusion of local restaurants in food discount program and attendee engagement floor activities."
- "Pre-convention involvement."
- "Select a local charity to benefit from some kind of event/activity at our event."
- "Social media and restaurant activities; promote local businesses."
- "Try and use media contacts to expand it. Personal and professional social media contacts."
- "Using off-site venues for diners and activities."
- "Volunteer activities, donations to local communities impacted by our event(s), work with local CVB and government officials."
- "We always reach out to the airport fire chief when getting ready to site a city."
- "We choose a charity that attendees either bring clothes (Dress for Success) or one where they can donate money."
- "We do community service projects in every city we meet."
- "We have sections in various cities and are reaching out to them to spread the word and encourage attendance."
- "We offer one or more professional tours of local facilities related to our members' businesses."
- "We only use local vendors and try to seek out diverse vendors as well. Also, pro social activities help to connect our goals with the interests of the local community."
- "We plan jointly with the CVB's and city and county governments for our 6,000 attendees visiting relatively small towns."
- "We send out newsletters prior to the event with information on the community we will be in. We tried to do community service projects but found them too expensive."
- "We work with a local charity and do something that will benefit them; have attendees donate items to women's abuse center, stitch quilt blocks/quilts for charity, etc."
- "Work with Mayor's office."

IV. How Attendees & Exhibitors are Changing

This section provides a mix of quantitative and qualitative findings from the event organizer respondents covering how attendees and exhibitors are changing.

How Attendees are Changing

Survey Question: ***Overall, how do you see attendees changing?***

It is interesting how many event organizers see the later attendee registration trend. Getting harder to reach with marketing can be seen, in a way, as a positive for events, as other marketing channels are disrupted and are not as effective as in the past.

	All Events %	Events with 2,500+ Attendees
Registering closer to the event days, making later decision to attend	79%	80%
Using more technology on-site	63%	64%
More interested in networking opportunities	63%	64%
Getting harder to reach with marketing messaging	55%	55%
More interested in educational session and content	48%	46%
Booking outside the official event hotel blocks	45%	47%
Not attending the event for as long	37%	41%
Are getting older on average	27%	29%
Are getting younger on average	19%	18%
More interested in visiting the exhibitors	17%	20%
Have more buying authority or influence	8%	5%
Less interested in educational session and content	5%	3%
Less interested in networking opportunities	2%	2%
Other	1%	0%

"Attendees at events are demanding a richer experience. They are fatigued with traditional meeting formats. They are wanting a more tailored and relevant experience at meetings and events." - AIPC Member

How Exhibitors and Sponsors are Changing

Survey Question: ***How do you see top exhibitors and sponsors and corporate partners changing?***

Event organizers see their exhibitors and sponsors changing primarily in that they want more customized opportunities, proof of ROI, more audience and lead data, as well as more digital marketing opportunities tied to their event participation.

	All Events %	Events with 2,500+ Attendees
Customizing sponsorship opportunities and programs	60%	67%
Want proof of ROI	59%	63%
Want more audience demographic data	53%	49%
Want higher level and more targeted leads with more information	49%	47%
Want more digital marketing opportunities tied to the event	45%	52%
Looking to differentiate at event	43%	40%
Getting more marketing savvy	30%	28%
Interested in more exclusivity	29%	24%
Consolidation and M&A on exhibitor end reducing number of exhibitors or budgets	26%	28%
Other	1%	0%

V. Event Organizer & AIPC Member Comparisons & Disconnects

This section provides comparative data from both the event organizer and 2019 AIPC Member Survey. Both surveys asked each group a number of similar questions. This section mainly focuses on areas where there are large disconnects between the two groups. It is important to note that the event organizer statistics in this chapter are taken from the respondents that run at least one event with more than 2,500 attendees.

Disconnects – Events Want More Than Members Realize

There's a large gap in the types of enhancements event organizers want related to transportation access outside venues, and overall exhibit hall quality and functionality.

	Events with 2,500+ Attendees	AIPC Members	Difference
Exhibit hall enhancements	60%	41%	+19%
Improvements in access to transportation outside venue	48%	20%	+28%
Adding on-site activities, special events	49%	38%	+11%
Adding demo and education activities on exhibit floor	48%	38%	+10%

Disconnects – Attendee & Exhibitor Trends

Later registrations by attendees is making event organizers nervous – and exhibitors need better ROI tracking.

	Events with 2,500+ Attendees	AIPC Members	Difference
Attendees registering later	80%	60%	+20%
Attendees not staying as long as previously	41%	33%	+8%
Exhibitors want proof of ROI	63%	50%	+13%
Adding demo and education activities on exhibit floor	48%	38%	+10%

Disconnects – Event Organizer Cost Increases Compared to Centre Revenue Growth Expectations

Big gaps are seen related to F&B and technology costs expected by event organizers compared to AIPC members' revenue expectations in these areas.

	Events Spend Increasing	AIPC Revenue Increasing	Difference
F&B	80%	54%	+26%
Telecommunications, technology	76%	44%	+32%
AV	70%	60%	+10%
Event services, equipment rental	75%	60%	+15%
Exhibit hall rent	58%	64%	-6%
Ballroom, meeting room rent	41%	64%	-23%

Disconnects – Venue Technology and Telecommunications Demand Outlook

Centres may not fully realize that event organizers expect even more substantial technology and telecommunications demand growth over the next few years.

	Events with 2,500+ Attendees	AIPC	Difference
Increasing substantially	42%	29%	+13%
Increasing modestly	53%	52%	+1%
Staying the same	5%	14%	-9%
Decreasing	0%	5%	-5%
Exhibit hall rent	58%	64%	-6%
Ballroom, meeting room rent	41%	64%	-23%

Where AIPC Members are Out Front of Event Organizers

AIPC members rate the following higher and more important than event organizers: multi-function/flexibility, green initiatives, and enhanced AV.

	Events with 2,500+ Attendees	AIPC	Difference
Importance of multi-function/flexibility	45%	77%	-32%
Green, environmental initiatives	45%	65%	-20%
Enhanced AV services	36%	60%	-24%
Risk to growth from government policies, politics	24%	45%	-21%
Exhibit hall rent	58%	64%	-6%
Ballroom, meeting room rent	41%	64%	-23%

VI. Challenges, Opportunities & Convention Centres of the Future

This section provides quotes from top event organizers around the world on their primary challenges and opportunities as well as how they see convention centres changing in the future.

Event Organizers' Biggest Challenges

Survey Question: ***Overall, what are the biggest challenges impacting your event and meetings business?***

Key themes from the responses include:

- Cost increases
- Bandwidth and technology services
- Food and beverage
- Audience development marketing
- Exhibitor budgets
- Consolidation among exhibitors and sponsors
- Competition
- Finding available venue dates
- Reaching and adding value for younger audiences

Select comments:

- "Ability to shorten conference length - reduce from 3 to 2 days."
- "Access and rental costs associated with venues."
- "Access, parking and wifi."
- "Poor food quality at most large convention hotels and centers. A venues lack of understanding of how important secure bandwidth and the price of connectivity is for companies. Having to use in-house AV services."
- "Advertising to young women. There are very few places to advertise where you can impact a large group at once. You have to advertise everywhere and it is constantly changing."
- "Aging attendees."
- "Attendance and increasing costs."
- "Biggest challenge- finding new affordable venues."
- "Both exhibitors and visitors lacking of time."
- "Budget justification verse other marketing venues."
- "Budgets versus expectations for the meeting."
- "Changes in technology. Less networking and more web-based events."
- "Competition."
- "Competition and fragmentation of main expo sectors into smaller more tailored and more frequent niche events."
- "Competition with internet."
- "Consolidation within some of our markets as well as major corporations doing their own events."
- "Cost of F&B, wifi and AV (we travel with our own AV company but the cost of working with the conference center team and what the rules of what you can and can't do within the centers are becoming more challenging)."
- "Cost of sleeping rooms and food and beverage expenses."

- “Cost. Attendees who are not employer sponsored are finding the costs increasing annually and becoming unaffordable.”
- “Costs for exhibitors.”
- “Costs for technology, lack of green business practices including clear labeling of recycling containers and someone to staff them to be sure people put things in the right places.”
- “Costs of food and beverage and still being able to keep our registration fees low.”
- “Costs, date and space constraints.”
- “Dates.”
- “Dates at venues, and labor costs.”
- “Driving more paid attendees.”
- “Evolution, by adapting the business event space to be on par with what is available in the consumer space (i.e., wifi, technology) and the cost of incorporating.”
- “Exhibitor consolidation and budget cuts. Rising cost of labor, show services and facility rental. Increasing competition from other events. Exhibitor and distributor hosted events.
- “Finding affordable space.”
- “Finding dates at venues that fit with our schedule.”
- “Finding LEED certified venues that provide sustainable catering and recycling.”
- “Finding space for the dates we need it.”
- “Finding suitable dates for our worldwide attendees considering religious holidays and other competing events.”
- “Finding talent.”
- “Getting delegates to commit earlier to attend. the general costs of hosting meetings in our country.”
- “GPDR.”
- “Growing exhibitors so we can increase attendees.”
- “Having more conferences and meetings affecting work/life balance for staff.”
- “Increased cost of hotel rooms and food and beverage.”
- “Increasing costs with the adoption of more/new technologies and declining attendance.”
- “Justifying expense.”
- “Keeping proactive in marketing the event.”
- “Keeping up with technology.”
- “Labor, marketing.”
- “Lack of venue availability meeting our criteria.”
- “Launch of new, competitive international expos.”
- “Locating and hiring the resources needed to materialize growth.”
- “Longer approval cycle and shorter lead times for exhibit sales.”
- “Lower budgets all around (including sponsors and exhibitors); participant expectations are still very high.”
- “Managing the number of buyers with sellers.”
- “Marketing and promotion.”
- “New attendees.”
- “Outrageous AV rental costs severely impact the bottom line.”
- “Overall costs but especially costs tied to F&B, internet and AV.”
- “Potential attendees getting approval from employers to cover costs.
- “Predicting what the younger generation wants and what’s important to them.”
- “Prices for sleeping rooms, food and audio visual.”
- “Reaching new delegates, getting sponsors and exhibitors.”
- “Reaching the correct audience in a way that reflects our brands in a forward thinking light.”
- “Regional events that compete, greater international attendance/exhibits.”

- "Rising costs; primarily with F&B, AV and telecommunications/IT."
- "Shift from hardware to software. Significant consolidation among exhibitor and sponsor base, and maturing attendee segments."
- "Showing true ROI and value add for events and meetings."
- "Staying relevant to our members and making the conference the conference they need to attend."
- "Sustained pressure to keep doing more with less. Delegates expect more but want to pay less, so do exhibitors and sponsors, yet costs only go up."
- "Technology, competition for attendees time."
- "Too many alternatives competing for time and attention from the same audience
- "Trust of new events."
- "Trying to accomplish more with less."
- "Trying to do more with the same budget year over year."
- "Virtual options."
- "Visa and travel restrictions; delay in exhibitor booking due to uncertainty with visa issues."
- "World economy changes (Europe/USA/China/India)."

Event Organizers' Biggest Opportunities

Survey Question: ***What are the biggest opportunities for your event and meetings business?***

Key themes:

- Partnerships with other organizations and event organizers
- Packages and bundled service offerings
- Data capture and analysis
- ROI measurement for exhibitors
- Enhanced and more creative sponsorship opportunities
- New events
- Digital revenue
- Overall value of in-person, face-to-face marketing

Additional comments:

- "5G and Artificial Intelligence."
- "Always looking for metrics on the event and impact of the event, telling the story."
- "Attendance."
- "Attendee acquisition."
- "Attracting more international attendees to our events."
- "Attracting peripheral markets."
- "Awareness of sustainability as a business model is increasing."
- "Being able to continuing advancing the profession by establishing and building strong loyalties with early career professional and those new to the field."
- "Building book of business."
- "Bundling exhibitions, conferences and digital spend rather than selling separately. Providing predictive analysis to exhibitors and sponsors."
- "Capture data and make it useful."
- "Complete meeting packages."
- "Creating events that allow us to connect with our fans in a real and honest way."

- "Customer satisfaction."
- "Develop effective ROI measurement, package costs for exhibitors."
- "Developments in interactive attendee engagement technology."
- "Digital and sponsorship revenue streams."
- "Duplicating the event into other city."
- "Emerging digital platforms for attendees and exhibitors. One-on-one programs, higher touch matching of buyers and sellers."
- "Enhanced professional development for our members/attendees."
- "Exploring new methods of presentation that engage attendees."
- "Extending reach."
- "Face-to-face contact."
- "Fellowship and renewal."
- "Finding creative ways to do more with less; determine small cost ways to increase value exponentially."
- "Global (10-15%) domestic (5-7%) increase in exhibit space and buyers."
- "Grow membership will grow the meeting."
- "Had our first virtual conference last week - saved money on travel expenses for staff and speakers."
- "Harnessing/capitalizing on wifi and blue tooth potential for exhibitors and attendees."
- "Increase in membership."
- "Increasing attendance."
- "Increasing attendance through more social media."
- "Joint events with similar industries."
- "Meeting the meeting demands of communities."
- "More attendees."
- "More online training and remote participation."
- "Moving events to new and different venues."
- "Moving into new markets and attracting new attendees."
- "New conferences for new industries and also for break away groups within existing industries."
- "New markets in relatively untapped areas."
- "Organic growth."
- "Our industry cannot support more than one large domestic event, so until that vanishes, the opportunities are very limited."
- "Partnerships with other event organizers, associations and groups to add critical-mass and additional, related industry audiences to our leading event."
- "People still want face to face meetings and education."
- "Public transportation, parking, ease of getting to venue."
- "Rapid adoption of new ideas/concepts."
- "Reaching a younger audience."
- "Reshaping the experience of attending."
- "Selling more and different things."
- "Showcasing equipment and face-to-face meetings with customers and prospects."
- "Smaller, quicker to market events."
- "Sourcing the non-members, trying to touch the non-members."
- "Staying consistent as far as number of meetings."
- "Streamlining processes."
- "Technology allowing people to attend via online methods."
- "Technology offering innovative ways to break through the clutter."

- "The impersonal nature of social media and buying on the internet. The pendulum will be swinging back toward personal experience; face-to-face contact with people; being able to personally touch, taste, smell and see products."
- "To reach additional markets."
- "Understanding buyers better."
- "Unique spaces and different schedule flows."
- "Venues need to go all out on environmental green practices. Locally sourced food, smaller portions, clearly labeled recycling containers, back of the house food tours, good composting options."
- "Venues working with us on food, sleeping rooms and audio visual. CVB's being heavily involved in planning."
- "With increased attendance we have more buying power."
- "Working with new exciting vendors that are providing a different level of service or product."

Event Organizers on the Future of Convention Centres

Survey Question: ***Thinking overall about convention centres over the next five to ten years and beyond, what will the Convention Centre of the Future need to look like to best meet your requirements? Please think in terms of venue spaces, functionality, amenities and services.***

Key themes:

- Enhanced customer service
- Enhanced technology services and bandwidth
- Improved transportation connections to centres
- Different venue areas for learning and networking
- Better integrate locations and services with attendee/consumer expectations
- Incorporate more natural elements, lighting, outdoor spaces, plants, etc.
- Automated services

Respondent comments:

- "Accessible for people with disabilities, Technology wifi costs come down."
- "Affordability. It doesn't matter what the future convention center looks like and what services it provides if in the end it's not affordable."
- "Better customer service and treating us like a partner."
- "Better telecoms services, and better access from the major cities."
- "Better wifi solutions, convenient meeting room space with functional tech, cleanliness
- "Column free and carpeted space with complimentary WiFi, More healthy food options and known brand names."
- "Column free exhibit space with connected meeting space for education. Good loading docks, storage space for empty crates. High quality wifi, interesting food options for exhibitors and attendees. Convenient parking and transit options."
- "Definitely more open spaces for more creative seating and learning opportunities inside and out. Better connectivity bandwidth with better pricing."

- "Dynamic, flexible and organic space that can adapt to evolving needs."
- "Easy transportation access for international and domestic attendees; access to restaurants, cultural activities and entertainment; sense of safety in venue and surrounding facilities, local hospitality involvement; better technology infrastructure; exhibit space growth potential with affordable F&B, quality service and networking opportunities provided by exhibitors in their booth."
- "Flexibility not size; availability of dates and slots."
- "Flexibility with reasonable labor costs."
- "Flexible exhibit and meeting space, close parking and/or shuttle service provided, adequate telecommunications to handle sales transactions."
- "Flexible meeting space. Diverse seating options - i.e. size, shape of tables, chairs, etc. for alternative sets. More flexibility among the staff to think outside the box for alternative sets. Take IT and wifi in-house instead out outsourcing to one primary company."
- "Free wifi or priced reasonably. Need more break-out rooms. More public space."
- "Full technology advances available."
- "Good bandwidth, flexible spaces, flexible attitude with clients."
- "Halls for general sessions and multiple breakout rooms, with natural light options. Secure and low cost bandwidth, quality food and beverage service, connected hotels that can accommodate the entire group, outdoor function space."
- "Has to provide services that everyone expects in their daily life (bandwidth, quality/choice F&B, power/usb, customer focused/personalized services), immediacy in response time."
- "Increased, affordable internet connectivity."
- "Interlinked event room layout, enhanced telecoms, easy accessibility."
- "It needs to be multi-functional in terms of space, technology, accessibility."
- "Large, open column-less space that allows trucks to be demonstrated on exhibit floor.
- "Last minute decisions and purchasing with a very fast turn-around."
- "LEED certified, sustainable food, recycling."
- "LEED certified. One large plenary room (800+ people) and at least 8 smaller (250+ people) educational breakouts. Water stations in each room. Internet accessibility in meeting rooms, not just public spaces. Stage and lighting settings to allow good quality streaming video and recording of sessions. Locally sourced food and vegan/vegetarian options."
- "More automation."
- "More comfortable, more natural lighting, flexible work and meeting space, healthier food choices."
- "More open spaces for people to network intentionally, and common areas that are comfortable and conducive."
- "More thoughtful networking space and creative meeting solutions."
- "Multi-purpose venue."
- "One stop shop, provide all the services needed for convention/conferences."
- "Open, flexible spaces that are attractive and well located in relation to other services, hotels and city centres."
- "Outdoor space or access to natural light in the lunch breaks/exhibition."
- "Package room rentals that include typical AV set up, or no exclusive suppliers tied to the venue ; one stop shop for full conference/exhibition requirements; sustainable F&B services; hotel/convention concessions."
- "Providing complimentary wifi, discounted meeting space, built in audio visual, multiple food and beverage outlets."
- "Scalability to enlarge or decrease space with minimal penalty fees; improved wifi; at a combination conference and exhibit hall, ensure there are ample opportunities to visit exhibit hall, not just have attendees visit conference."

- “Since we are in the hospitality industry, the F&B capabilities of the venue need to significantly step up to a higher quality.”
- “Somewhat upscale with crowd controllable space. Large, open exhibit hall.”
- “Space that is flexible for a variety of set-ups.”
- “Technology enabled, flexible space utilization.”
- “Technology rich, visually exciting, encourage personal experience, not pressured, experiential.”
- “The new convention space should be one that offers scale-able exhibition space, has a feel that brings nature into play (outdoor space, green, green production), has a seamless arrival and departure system for transportation and registration and takes overall wellness of attendee as paramount.”
- “There will not be a substantial change, but our attendance will grow. Thus facility capacity will need to be larger.”
- “Transportation is an issue. Parking is very important. The use of non-union services. Wifi is essential.”
- “Unique venues with a opportunity for a memorable experience.”
- “They need to be flexible especially with the smaller non-profit associations.”
- “Value for investment, flexibility, as events are changing.”
- “Venue with attached hotel and attached parking.”
- “Virtual reality.”
- “Will need to be flexible. Have lots of space options. Affordable in-house AV and catering.”

Methodology & About the Respondents

AIPC and Access Intelligence conducted the survey of event organizers around the world between April and June 2019. The survey received a diverse group of responses from 218 event organizer organizations. Some of the tables below may not add to 100% due to multiple answer options.

Organization Type

	All Events %
Association with conventions, conferences or meetings	36%
For-profit trade show, exhibition or trade fair organizer	25%
Corporate meeting planner	8%
Professional convention management organization	8%
Conference producer	7%
Consumer show producer	3%
Special event owner/planner	3%
Non-Governmental Organization	3%
Other	6%

Type of Largest, Most Significant Event

	All Events %
Convention/Conference with exhibit component	51%
Exhibition/Trade Show/Trade Fair	30%
Meeting	6%
Convention/Conference without exhibit component	4%
Corporate Marketing Event	4%
Consumer Show	3%
Other	1%

Attendance at Largest, Most Important Event

	All Events %
Under 1,000 attendees	18%
1,001 to 2,500 attendees	13%
2,500 to 10,000 attendees	37%
Over 10,000 attendees	31%

Size of Largest, Most Important Event in Gross Exhibition Space

	All Events %
Under 50,000 net square feet / 15,000 net square meters	24%
50,001 to 100,000 net square feet / 15,001 to 30,000 net square meters	22%
100,001 to 250,000 net square feet / 30,001 to 76,000 net square meters	27%
Over 250,001 net square feet / 76,001 net square meters	20%
Not Applicable	7%

Number of Events in 2019

	All Events %
1 to 5	36%
6 to 10	28%
11 to 25	14%
26 to 50	4%
Over 51	17%

Facilities Typically Booked

	All Events %
Convention Centres	73%
Convention Hotels	48%
Exhibition Centres	25%
Resort Hotels	21%
Conference Centres	18%
Other	6%

Country or Region of Main Offices

	All Events %
Africa	1%
Asia	5%
Australia/New Zealand	5%
Canada	9%
Europe	23%
Central America	1%
South America	3%
Mexico	4%
Middle East	1%
United States	51%

Region of Largest, Most Important Event

	All Events %
Africa	1%
Asia	5%
Australia/New Zealand	5%
Canada	8%
Europe	23%
Central America	1%
South America	2%
Mexico	3%
Middle East	1%
United States	52%
Other	1%

Appendix: Expanded Event Organizer and AIPC Member Comparisons

This appendix provides a larger comparative data set. The event data is based on responses from those that run at least one event with over 2,500 attendees. Before each data table are the survey questions as they were worded in the event management and 2019 AIPC Member Survey questionnaires.

Event Management Question: How do you expect your overall event needs related to venues to change over the next few years? AIPC Member Question: How do you expect your key clients' overall event needs related to venues to change over the next few years?

	Events with 2,500+ Attendees	AIPC
Enhanced technology and telecommunications needs, bandwidth	59%	77%
More overall multi-function capabilities and venue flexibility	45%	77%
Higher-quality food and beverage services	50%	64%
More meeting room space	45%	41%
Improved overall event and venues experience ambience, aesthetics	50%	58%
More green and environmental sustainability initiatives	45%	65%
Improved signage and way-finding	52%	45%
Enhanced audio-visual services needs	36%	60%
Higher quality meeting rooms	30%	50%
Improvements in access to transportation at venues (taxis, shuttle buses)	48%	20%
More exhibit space required	44%	39%
More general session space	30%	18%
More attendance promotion assistance	35%	33%
More pre-function space	26%	28%
More ballroom space	11%	12%
More parking	27%	12%
More use of lecture theatre(s) with fixed seating	8%	4%
Other	8%	8%

Event Management: Which spaces and areas in the most important venue you use do you see the most need of enhancement or investment? AIPC Members: Looking forward, which spaces and areas in your venue do you see in most need of enhancement or investment?

	Events with 2,500+ Attendees	AIPC
Technology infrastructure or services	52%	53%
Meeting rooms	43%	47%
Exhibit halls	60%	41%
Venue connections and links to transportation, such as shuttle bus and taxi areas	43%	14%
Client-facing food service areas and restaurants	31%	29%
Ballroom(s)	23%	21%
Venue connections and links to hotels or other key buildings	32%	14%
Pre-function spaces	28%	28%
Signage	26%	37%
Loading dock and related areas	26%	22%
Outdoor, outside areas	12%	28%
Other concession areas and store-fronts	20%	8%
Business centre	9%	5%
Kitchen(s)	11%	27%
More ballroom space	11%	12%
More parking	27%	12%
More use of lecture theatre(s) with fixed seating	8%	4%
Other	8%	8%

Event Management: How are your largest, most important events changing? AIPC Members: How are your key event management clients changing?

	Events with 2,500+ Attendees	AIPC
Requiring more telecommunications/internet bandwidth and related services	70%	69%
Event attendance is growing	58%	47%
Requiring more meeting room spaces and breakouts	47%	54%
Requiring higher-quality food and beverage	47%	48%
Number of exhibitors is growing	44%	39%
Events are getting larger in terms of exhibit space requirements	44%	35%
Increased negotiations with venues	47%	68%
Focusing more on event design and ambiance	41%	54%
Requiring more ballroom and space for general sessions	17%	17%
Short events in terms of total number of days	22%	47%
Requiring attendance promotion assistance	23%	23%
Requiring more outdoor areas/spaces	16%	18%
Number of exhibitors is declining	17%	18%
Event attendance is declining	14%	17%
Events are getting smaller in terms of exhibit space requirements	5%	15%
Longer events in terms of total number of days	6%	5%
Other	8%	4%

Event Management: How are your event management business practices changing? AIPC Members: How are your event management clients' business practices changing?

	Events with 2,500+ Attendees	AIPC
Increased negotiations with venues, hotels and CVBs	67%	73%
Focusing more on event design and ambiance	45%	54%
Shorter venue booking windows, booking closer to the event dates	31%	78%
Requiring higher-quality food and beverage	41%	48%
Longer venue booking windows, booking further from the event dates	34%	11%
Asking for more public relations assistance and outreach to city and regional leaders	23%	46%
Requiring attendance promotion assistance	23%	30%
Other	2%	7%

Event Management: How are your event operational practices changing? AIPC Members: How are your key event management clients' event operational practices changing?

	Events	AIPC
Focusing more on event experience design and ambiance aesthetics	62%	72%
Enhanced telecommunications bandwidth	62%	63%
On-site event activities and special events	49%	38%
Adding more demonstration and educational activities on exhibit floors	48%	38%
Enhanced registration and attendee check-in services	32%	28%
Improved signage, way-finding	43%	43%
Focusing on improving service provider/vendor management	34%	22%
Enhanced AV services	25%	52%
Using more space and area in venues such as atriums and outdoor space	20%	44%
Improved access to transportation	25%	7%
Training/preparing on-site staff and vendors/partners	23%	8%
Changing key event operations-related service providers such as General Service Contractors or event labor providers	18%	10%
Other	6%	3%

Event Management: What are the top risks to growth related to your event business? AIPC Members: What are the risks to the growth to your specific centre business?

	Events with 2,500+ Attendees	AIPC
Hotel availability and pricing	43%	49%
Exhibitors and sponsors questioning exhibition and event ROI	43%	Not asked
Lack of venue open dates	49%	Not asked
Overall economic strength	44%	29%
Growing competition from other event organizers (AIPC Members: from other centres/regions)	36%	68%
Government policies, politics	24%	45%
Air travel issues (pricing, availability, airlift, route access, etc.)	18%	31%
Replacement of events with online alternatives	14%	15%
Immigration or visa requirements limiting access	19%	14%
Increases of corporations and individuals using digital media and communications	11%	8%
Government / corporate restrictions on events and meetings	8%	15%
Other	5%	10%

Event Management: In which of the following venue service and cost areas do you expect to see an increase or decrease in terms of your total spending in 2019 compared to 2018? AIPC Members: Which of the following revenue streams do you expect to see an increase, or decrease, in terms of total revenue in 2019 compared to 2018?

	Events Increasing	AIPC Increasing
F&B	80%	54%
Telecom, technology	76%	44%
AV	70%	60%
Event services, equipment rental	75%	60%
Security on-site	62%	Not asked
Exhibit hall rent	58%	64%
Signage, advertising	46%	39%
Ballroom, meeting room rent	41%	64%
Parking expenses	47%	20%

Event Management: Overall, how do you see attendees changing? AIPC Members: Overall, how do you see attendees changing?

	Events with 2,500+ Attendees	AIPC
Registering closer to the event days, making later decision to attend	80%	60%
Using more technology on-site	64%	82%
More interested in networking opportunities	64%	78%
Getting harder to reach with marketing messaging	55%	36%
More interested in educational session and content	46%	45%
Booking outside the official event hotel blocks	47%	54%
Not attending the event for as long	41%	33%
Are getting older on average	29%	3%
Are getting younger on average	18%	31%
More interested in visiting the exhibitors	20%	18%
Have more buying authority or influence	5%	15%
Less interested in educational session and content	3%	7%
Less interested in networking opportunities	2%	2%
Other	0%	3%

Event Management: How do you see top exhibitors and sponsors and corporate partners changing? AIPC Members: How do you see top exhibitors and sponsors changing at the major exhibitions in your centre?

	Events with 2,500+ Attendees	AIPC
Customizing sponsorship opportunities and programs	67%	53%
Want proof of ROI	63%	50%
Want more audience demographic data	49%	29%
Want higher level and more targeted leads with more information	47%	33%
Want more digital marketing opportunities tied to the event	52%	64%
Looking to differentiate at event	40%	53%
Getting more marketing savvy	28%	19%
Interested in more exclusivity	24%	32%
Consolidation and M&A on exhibitor end reducing number of exhibitors or budgets	28%	14%
Other	0%	4%

Event Management: Do you anticipate total attendance figures at your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate overall, total attendance at all events and groups in your centre increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	4%	12%
Increasing modestly	65%	59%
Staying the same	26%	21%
Decreasing modestly	4%	8%
Decreasing substantially	1%	0%

Event Management: Do you anticipate your requirements for ballroom and meeting space for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your clients' total ballroom and meeting space usage in square meters/footage increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	12%	12%
Increasing modestly	45%	55%
Staying the same	38%	29%
Decreasing modestly	5%	4%
Decreasing substantially	0%	1%

Event Management: Do you anticipate your requirements for exhibit space for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your event and group clients' total exhibit space usage in square meters/footage increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	5%	7%
Increasing modestly	59%	52%
Staying the same	29%	33%
Decreasing modestly	4%	9%
Decreasing substantially	2%	0%

Event Management: Do you anticipate your use of pre-function, atrium and/or foyer space for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your clients' total pre-function, atrium and/or foyer space usage increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	14%	23%
Increasing modestly	34%	42%
Staying the same	48%	33%
Decreasing modestly	3%	1%
Decreasing substantially	0%	1%

Event Management: Do you anticipate your needs for on-site audio-visual services for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your clients' total audio-visual services spending increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	19%	20%
Increasing modestly	45%	67%
Staying the same	36%	10%
Decreasing modestly	0%	2%
Decreasing substantially	0%	1%

Event Management: Do you anticipate your needs for venue telecommunications, internet and technology services for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your clients' total venue telecommunications, internet and technology services spending increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	42%	29%
Increasing modestly	53%	52%
Staying the same	5%	14%
Decreasing	0%	5%

Event Management: Do you anticipate your needs for venue food and beverage services for your most important event increasing or decreasing over the next three to five years? AIPC Members: Do you anticipate your client's total venue food and beverage services spending increasing or decreasing over the next three to five years?

	Events with 2,500+ Attendees	AIPC
Increasing substantially	9%	12%
Increasing modestly	52%	48%
Staying the same	32%	25%
Decreasing modestly	6%	14%
Decreasing substantially	0%	1%

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