

MEMBER SURVEY

2021

*Recovery
Outlook:
Insights,
Benchmarks
and Analysis*

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Introduction

Welcome to the 2021 edition of the annual AIPC Member Survey Report. This unique survey analysis continues to identify and track multi-year trends impacting the convention centre industry around the world. The majority of the questions in this survey cover the impact of the pandemic and the steps centre management teams are taking to prepare for the recovery and host in-person events and meetings again. The report focuses on the following key areas:



The study has been developed by AIPC in collaboration with Michael Hughes, Managing Director of Research & Consulting with Access Intelligence, LLC. AIPC conducted the survey of all members around the world in April and May 2021. The survey received responses from 55 member venues.

It is important to note that even though the total number of responses in some regions is small the survey data has high validity. A small number of responses in certain regions equates to a high proportion of AIPC members and very often the total number of venues in each of the major regions of the world. It is understood that there are significant differences in the impact of the pandemic around the world, and that the situation is likely to change over the next few months, and possibly longer.

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



Executive Summary

After a very difficult period of pandemic and disruption, the AIPC membership has entered the industry reactivation and recovery phase. The pace of the industry re-start and recovery varies significantly around the world. And even as of mid-2021 some centres are still essentially closed, or are only partially open and working under significant attendance capacity restrictions. To say this has been a challenging period for the convention centre industry around the world would be a severe understatement. In fact, this has been a very severe time for the industry with no modern era comparison on such a global scale.

While the events and meeting industry was essentially completely shut down for nearly a year around the world, the good news is there is well-documented evidence of major pent-up demand to get back to live, in-person events and gatherings both by businesses and general attendees/consumers. And the number of events and group meetings being held in AIPC member venues around the world is continuing to increase. That multiple vaccines have been developed that work extremely well is absolutely critical to starting the industry on the path to a sustainable recovery.

It may still be hard for some venue management teams and their destination marketing partners to imagine, but the outlook for the industry in 2022 to 2024 and beyond is potentially strong. It is not out of the question that in three to five years, and maybe even before, that the convention, exhibition and meetings industry could potentially enter another boom period similar to what was experienced from about 2014 to 2019. But clearly there is still at least another year ahead of disruption, challenges and new situations to navigate for the industry.

The many write-in comments in this study from AIPC members paint a mixed picture on the outlook. Here are a few that highlight these differences:

“The layoff of people will cause a loss in knowledge and expertise. New event formats will arise and centres need to be prepared for that and be more technology driven.”

“Hybrid will be here to stay in some form, but the need for face-to-face will be even stronger when safe to meet.”

“(There will be) more emphasis on event design and technology for face-to-face, online and hybrid. Stronger need for partnerships and co-creation, with all stakeholders involved. More flexibility.”

“I think our industry will sadly get a bit smaller with more and more events switching to digital alternatives or being abandoned altogether.”

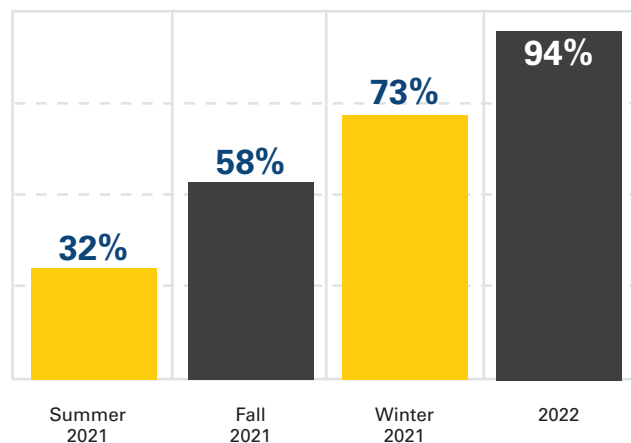
“Digitization, creativity and security are the main challenges we will face in the future. Technologies were around before the pandemic, and while they offer an alternative, they do not provide the same level of engagement as physical events. In this sense, face-to-face events will return with force in the near future.”

Seven key insight areas from the survey are presented on the next pages.

INSIGHT #1: Over 90% of AIPC members expect pandemic-related centre capacity restrictions to be lifted by 2022 – and over half expect to be fully open by the fall of 2021

Ninety-four percent of AIPC members believe pandemic-related capacity restrictions will be fully lifted by or before 2022. These findings suggest that the pandemic period will have caused at least two full years of major industry disruption. Yet, looking to the positive, 73% of members expect to be fully open by the winter of 2021.

WHEN PANDEMIC CENTRE CAPACITY RESTRICTIONS ARE EXPECTED TO BE LIFTED: ALL MEMBERS WORLDWIDE



INSIGHT #2: Important client events and meetings held in 2021 have drawn 58% of pre-pandemic attendance levels

On average, the largest client events and group meetings held in 2021 (as of April and May) have drawn 58% of the number of attendees compared to when the event was last held in 2019. The table below provides averages for the largest event attendance figures in 2021, and how this compared to the same event's 2019 attendance level. The survey question was: *What has been the attendance size of the largest event held in your centre so far in 2021? And how did the attendance compare to the same event held pre-pandemic?*

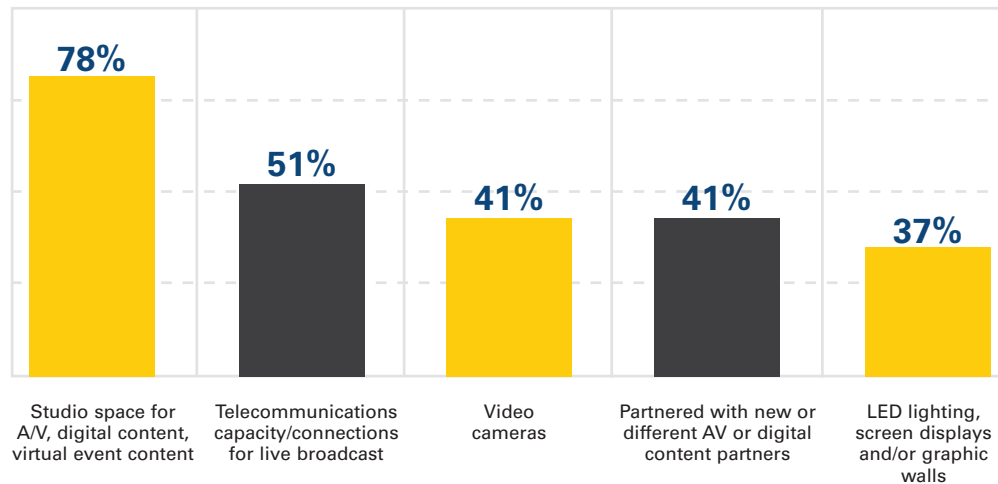
ATTENDANCE LEVELS AT LARGEST IN-PERSON EVENT HELD IN 2021 COMPARED TO 2019

	Average All Members Worldwide
Average attendance size of largest event held to date in 2021	2,729 attendees
Average attendance comparison to same event held in 2019 (% change +/-)	58% compared to 2019 level

Insight #3: Nearly eight out of ten AIPC member centres are investing in new or upgraded audio-visual studio spaces and digital communications technologies

By far, the highest percentage of members (78%) are pursuing investments or upgrades to studio space for A/V and digital content production. Just over half have or plan to upgrade their telecommunications capacity to facilitate live broadcasting.

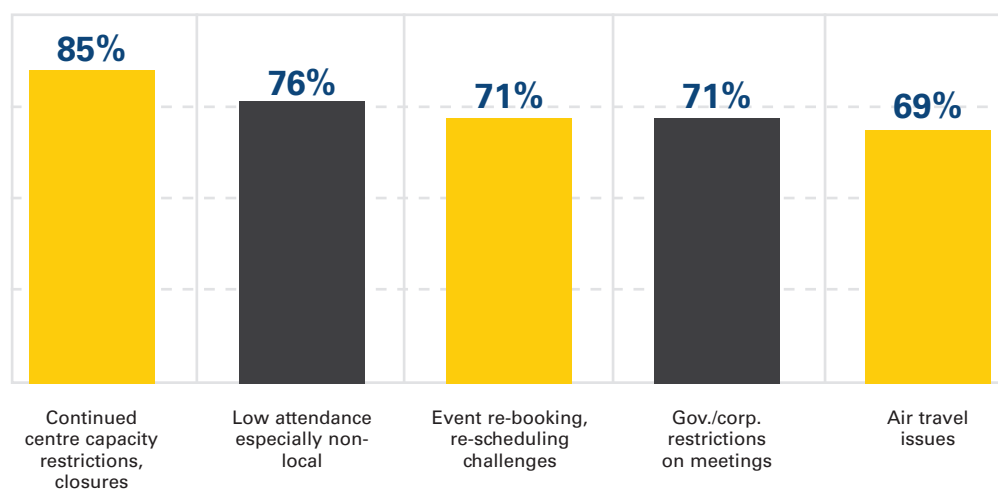
CENTRES' TOP FIVE TECHNOLOGY AND DIGITAL COMMUNICATIONS INVESTMENT AREAS



Insight #4: The biggest risks facing centres are the potential for extended government capacity restrictions, difficulty forecasting in-person event attendance levels, and event and group re-scheduling challenges

The survey asked what are the risks to growth related to members' specific centre business. The top five risks seen by members are provided in the chart below. These are essentially related to still unknowns about what available capacity will be, as well as the level of event client and attendee demand. These findings show that the fundamentals about the business (supply and demand), as of mid-2021, are still in flux.

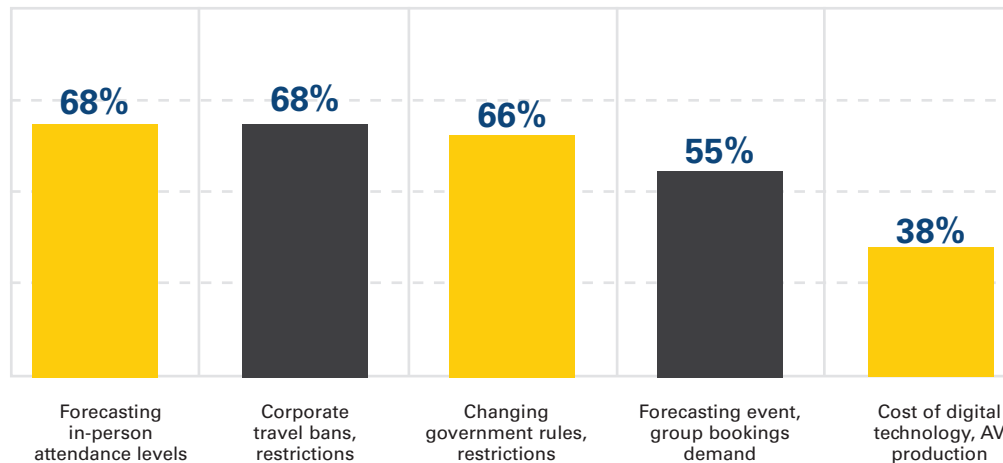
TOP FIVE BIGGEST RISKS SEEN BY CENTRE MANAGEMENT TEAMS



Insight #5: Forecasting in-person attendance and corporate travel restrictions are the top two challenges impacting centers' post-pandemic plans

Members feel that the biggest challenges related to developing and implementing post-pandemic in-person event and group plans are forecasting in-person attendance/participation levels, corporate travel bans and restrictions, and changing government municipal rules, regulations, restrictions and protocols.

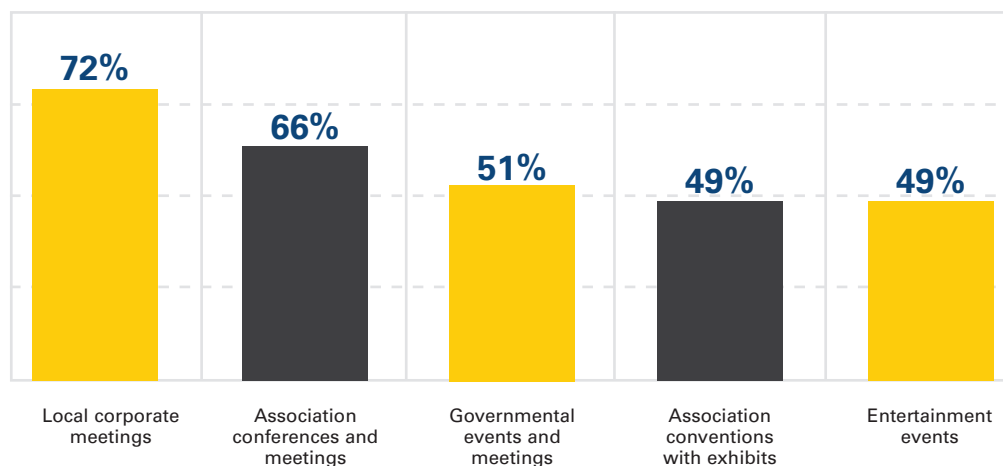
CHALLENGES TO IMPLEMENTING POST-PANDEMIC IN-PERSON EVENT PLANS AND PROCEDURES



Insight #6: Local corporate meetings are expected to be the strongest client segment over the next two years

Local corporations are expected to be the top client segment over the next few years of recovery, followed by association conferences and meetings. Over half of members also expect that governmental-related events and meetings will be an important bookings segment.

TOP FIVE CLIENT AND GROUP SEGMENTS WITH BEST TWO-YEAR GROWTH OUTLOOK



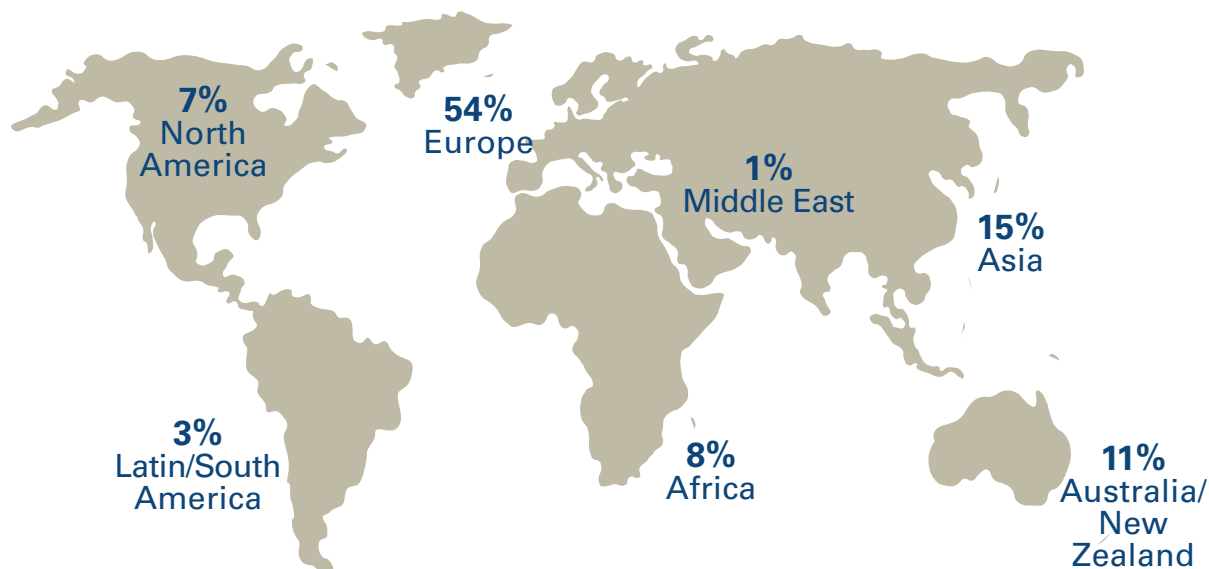
Insight #7: How AIPC members see this challenging period impacting the future of the industry

The survey asked members for comments on how they think the pandemic will impact the future of the convention centre and events industry. Key themes in the dozens of write-in responses include:

- Continued focus on health and safety in terms of facility design and usage
- Re-thinking venue spaces and types of usage
- Expectations that hybrid events will be the norm
- Search for new revenue streams and business models
- Need for staff with increased technology skills
- Increased use of digital tools and technology platforms
- Concerns about permanent loss of staff expertise at venues and other industry groups
- Expectation that there is still another year of pandemic-related disruptions and change
- Unknowns about the pace of the recovery

Member Survey Response by Region

Fifty-four percent of the survey respondents are European members, 15% are from Asia and 11% are in Australia/New Zealand.



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

I. Centre Operational Status

I. Centre Operational Status

This first section of the 2021 AIPC Member Survey covers the operational status of centres around the world as of April and May 2021. Also included in this section is data on current capacity restrictions at centres that are partially open, when restrictions are expected to be lifted and anticipated venue capacities. Also included are findings on how government or other organizations are using centres for pandemic-related operations, and centre staffing levels.

Centre Operational Status as of April/May 2021

SURVEY QUESTION: WHICH OF THE FOLLOWING BEST DESCRIBES THE STATE OF YOUR CENTRE'S CURRENT OPERATIONAL STATUS?

As of the second quarter of 2021, only 6% of AIPC members that responded to the survey were completely open for business with no capacity restrictions. Yet, half were partially open for business and hosting event and group clients with reduced capacity or booking restrictions. Thirty percent of centres, at the time the survey data was gathered, were closed to traditional client groups, but hosting government health-related operations.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Completely open for business and hosting event and group clients with no capacity or booking or other pandemic-related restrictions	6%	5%	0%	13%	17%	0%
Partially open for business and hosting event and group clients with reduced capacity or booking restrictions	50%	49%	20%	50%	33%	100%
Closed to traditional client groups such as conferences and exhibitions, but hosting government or pandemic-related health operations	30%	41%	60%	0%	0%	0%
Completely closed with no client, group, government or health-related usage	5%	0%	20%	13%	17%	0%
Other	9%	5%	0%	25%	33%	0%

2021 Event Attendance Levels

SURVEY QUESTION: WHAT HAS BEEN THE ATTENDANCE SIZE OF THE LARGEST EVENT HELD IN YOUR CENTRE SO FAR IN 2021? AND HOW DID THE ATTENDANCE COMPARE TO THE SAME EVENT (OR TYPE OF EVENT) HELD PRE-PANDEMIC – AND WHAT PERCENTAGE OF YOUR TOTAL ATTENDANCE CAPACITY DID THAT REPRESENT?

On average, the largest client events and group meetings held in 2021 (as of April and May) have drawn 58% of the number of attendees compared to when the event was last held in 2019. The table below provides averages for largest event attendance in 2021, and how this compared to the same event's 2019 attendance level.

	Average %
Average Attendance size of largest event held to date in 2021	2,729
Average Attendance comparison to same event (or type of event) held in 2019 (% change +/-)	58%
Percentage of centre's total attendance capacity the 2021 event represented	23%

Event Postponements and Rescheduling

SURVEY QUESTION: WHAT PERCENTAGE OF THE EVENTS THAT HAD BEEN POSTPONED DUE TO THE PANDEMIC HAVE ALREADY BEEN HELD OR ARE RESCHEDULED FOR A LATER DATE?

Around the world, only 13% of events that had been postponed due to the pandemic have already been held, although 69% of these are rescheduled for a later date.

	All %
Held already	13%
Rescheduled for later date	69%

Current Capacity Restrictions at Centres Partially Open for Business (as of April and May 2021)

SURVEY QUESTION: IF YOUR CENTRE IS PARTIALLY OPEN FOR BUSINESS AND HOSTING EVENT AND GROUP CLIENTS WITH REDUCED CAPACITY OR BOOKING RESTRICTIONS, PLEASE BRIEFLY EXPLAIN THE CURRENT CAPACITY REDUCTION ON A PERCENTAGE BASIS OR THE OTHER RESTRICTIONS.

This was an open-ended question asking for write-in responses. There was a wide range of responses. Key themes mentioned include:

- Many different rules and restrictions
- Some of the restrictions are based on a percentage of venue space capacity, while others are maximum crowd sizes
- Social distancing space requirements and recommendations as well as seating plans also differ around the world
- F&B has been restricted in many locations as well

Select comments:

- "0-30 persons."
- "2 sqm capacity - 50%. 1.5 metre spacing."
- "250 persons per venue for indoor events and 500 persons for outdoor events."
- "50 pax but max 1/3 of total capacity."
- "50% capacity reduction."
- "50% capacity reduction in all the rooms, except for the main auditorium, in which government has fix 600 people as maximum capacity (27%). Restrictions also apply to the catering: sitting is mandatory, tables for 4 people."
- "50% capacity, compulsory use of mask and signage to keep social distance. It's also compulsory to get the health authorities approval on floor plans and layouts."
- "50% capacity. 2 meter distancing in conference set up. 3 meter gangways."
- "50% of actual."
- "75% of capacity."
- "Actually we only can carry out events in 6% of our capacity. 5000 attendees without Covid."
- "Capacity is approx 15% of the usual number of seats."
- "Current capacity reduction: 50%. All catering must be seated."
- "Currently only streaming productions and urgently necessary Business Meetings allowed due to the high incidence rate. With lower incidence the reduction would be 90% (so only 10% of the usual capacity possible)."
- "Events: capacity around 25-50% (depend on the venue size). F&B: no standing/ reception service, all round table set-up with served buffet. PCR or swab test apply for all events (worker, visitor, etc.)."
- "From April 19th we can now host event up to 50 people Inside and 100 people outside."
- "The centre is currently in use as a Court venue for (our Country's) courts Service."
- "If it is assumed that infection prevention measures will be taken thoroughly and strictly, it is possible to contain up to 50%."
- "In our country, the current sanitary measures allow events up to 100 participants (indoor/outdoor) seated and

with 2m social distance between the participants. These measures are valid until May 15th, 2021. Catering before, during or after an event is currently prohibited.”

- “Max. 100 person.”
- “Numbers for any gathering is limited to 250 persons by our national government restrictions and our own venue capacity is constrained by social distancing requirements.”
- “Only open for digital conferences.”
- “Significant restrictions; the venue migrated to virtual events (AV capture and broadcast).”
- “The Centre is currently on Lockdown Level 1, as per the National Government Lockdown Regulations, which stipulates 100pax indoors, 250pax outdoors, or 50% venue capacity.”
- “The hotel is open and we have corporate travelers, air crew, etc. The venue is open and booked for digital meetings and smaller conferences up to 8 people.”
- “We are open for film shootings, theater rehearsals and for virtual events, but we cannot host normal events due to the governmental restrictions.”

When Restrictions are Expected to be Lifted and Anticipated Capacities

SURVEY QUESTION: WHEN DO YOU EXPECT RESTRICTIONS TO EASE AND WHAT CAPACITY DO YOU ANTICIPATE BY THE SUMMER OF 2021, FALL OF 2021, WINTER OF 2021, AND 2022.

Ninety-four percent of AIPC members believe pandemic-related capacity restrictions will be fully lifted by or before 2022. This finding suggest that this pandemic period will have caused at least two full years of major industry disruption. Seventy-three percent expect to be fully open by the winter of 2021, and over half by the fall of 2021.

	Average %	Average Total Attendance Number Capacity
Summer 2021	32%	1,104
Fall 2021	58%	2,346
Winter 2021	73%	2,694
2022	94%	2,833

How Government or Other Organizations are Using Centres for Pandemic-related Operations

SURVEY QUESTION: IF YOUR CENTRE IS CLOSED TO TRADITIONAL CLIENTS AND GROUPS BUT IS BEING USED BY GOVERNMENT FOR PANDEMIC-RELATED HEALTH OPERATIONS, PLEASE BRIEFLY EXPLAIN WHICH ORGANIZATIONS ARE USING THE CENTRE, AND THE TYPE OF USAGE.

Member comments:

- "City for elections, some virtual events and regional University/Business School for entrance examination, vaccinations."
- "City with medical partner, vaccination centre."
- "Currently preparing prepackaged meals for City's homeless response program. Meals are picked up and delivered to various locations and to individuals living rough."
- "Home shelter, vaccine center, conference streaming (private client), city council sessions."
- "Hospital."
- "Institutional events."
- "Institutional organizations."
- "Local and Federal government. We are doing some virtual events using our studio for some, limited traditional and commercial clients."
- "Municipal Health Services: Vaccinations, drive-thru COVID19 tests, regular COVID19 tests. City: We were used for the general elections for drive-thru voting (cars and bicycles)."
- "Testing and vaccinating."
- "The regional Health Authority has been using some of our pavilions to host the call centers that are organizing the vaccinations and monitoring the Covid19 positive cases in the whole region."
- "Vaccination Center, Ministry of Health, Blood Donation Hospitals, Homeless Shelter Municipality, COVID tests."
- "Vaccination centre."
- "Vaccinations and exams."
- "Vaccination."
- "We are used by the city and government for testing and vaccinating."
- "We have courts/trials taking place in our venue."

Centre Staffing Levels

SURVEY QUESTION: HOW DOES YOUR CENTRE'S STAFFING LEVEL COMPARE TODAY TO THE PERIOD BEFORE THE PANDEMIC?

Unfortunately, 61% of the respondents say their full-time staff level is lower now than before the pandemic. Forty-one percent indicate that part-time staff level is also lower.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Full-time staff level is higher	4%	3%	0%	17%	0%	0%
Full-time staff level is similar	34%	34%	50%	17%	33%	25%
Full-time staff level is lower	61%	63%	50%	50%	67%	75%
Part-time staff level is higher	9%	11%	0%	0%	0%	25%
Part-time staff level is similar	13%	9%	25%	17%	33%	0%
Part-time staff level is lower	41%	43%	50%	17%	33%	75%

II. Innovation, Risks and Growth Outlook

This very challenging and truly unprecedented era has required that members innovate, take risks and develop different revenue streams. This section covers the perceived strength of economic activity and business growth in member regions, the main risks to centre business activity, and when attendance levels are expected to rebound to match 2019 levels.

Strength of Economic Activity and Business Growth in Member Regions

SURVEY QUESTION: HOW DO YOU CHARACTERIZE THE OVERALL CURRENT STRENGTH OF ECONOMIC ACTIVITY AND BUSINESS GROWTH IN YOUR REGION?

Most members indicate they see economic activity in their region as weak to moderate. Members in Australia/New Zealand are seeing the strongest level of economic activity compared to other regions.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Strong growth/activity	9%	12%	0%	0%	33%	0%
Moderate	31%	32%	25%	17%	50%	0%
Weak	31%	32%	25%	50%	17%	25%
Very weak, flat to no growth	22%	15%	25%	33%	0%	75%
Negative growth, recession	7%	9%	25%	0%	0%	0%

Multi-Year Trends: Strength of Regional Economic Activity 2015 to 2021

The chart below provides the regional economic growth sentiment for all members worldwide over the past few years.

	2015	2016	2017	2018	2019	2021
Strong growth/activity	13%	21%	30%	27%	31%	9%
Moderate	61%	51%	57%	59%	59%	31%
Weak, flat or recession	26%	28%	13%	14%	10%	60%

Main Risks to Centre Business Activity and Growth

SURVEY QUESTION: WHAT ARE THE RISKS TO GROWTH RELATED TO YOUR SPECIFIC CENTRE BUSINESS? (SELECT ALL THAT APPLY.)

The top risks seen by members are provided in the chart below. These are essentially related to still unknowns about what available capacity will be, as well as event client and attendee demand. That means that the fundamentals about the business (supply and demand), as of mid-2021, are still in flux.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Pandemic-related: continued centre capacity restrictions and/or closures	85%	88%	100%	67%	67%	100%
Pandemic-related: low attendance especially from non-local attendees	76%	79%	50%	67%	83%	75%
Pandemic-related: event and group re-booking, re-scheduling challenges	71%	65%	25%	83%	83%	100%
Government / corporate restrictions on meetings	71%	68%	25%	67%	83%	100%
Air travel issues (pricing, availability, airlift, route access, etc.)	69%	67%	75%	50%	67%	100%
Pandemic-related: low demand from traditional event clients and groups	62%	59%	25%	83%	50%	100%
Replacement of events with online alternatives	58%	56%	25%	67%	67%	75%
Pandemic-related: increased costs for health, safety, physical distancing and/or technology investments	55%	44%	50%	67%	67%	100%
Increases of corporations and individuals using digital media and communications	51%	41%	25%	83%	67%	75%
Pandemic-related: legal issues, major disagreements and/or negotiations	38%	35%	50%	33%	33%	50%
Overall economic strength	36%	26%	50%	33%	33%	100%
Growing competition from other centres / regions	33%	32%	25%	0%	83%	25%
Sustainability, environmental concerns	29%	26%	50%	33%	33%	25%
Immigration or visa requirements limiting access	25%	18%	0%	67%	67%	25%
Changing government priorities	20%	18%	0%	33%	17%	50%
Hotel availability and pricing	18%	12%	50%	17%	33%	25%
Reputational issues	7%	8%	0%	17%	0%	0%
Other	5%	3%	25%	0%	17%	0%

New Revenue Sources Over the Past Year

SURVEY QUESTION: HAVE YOU ADDED ANY NEW IMPORTANT REVENUE SOURCES IN THE PAST YEAR?

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes	60%	58%	50%	33%	67%	100%
No	40%	42%	50%	67%	33%	0%

Members that added a new revenue source in the past year briefly explained what they did. Some of the most often mention revenue sources include:

- Digital and hybrid event related services
- F&B: off-site catering, new restaurant and food service concepts
- Serving TV, film and other video content producers
- Ticketing services
- Providing Covid testing and vaccinations

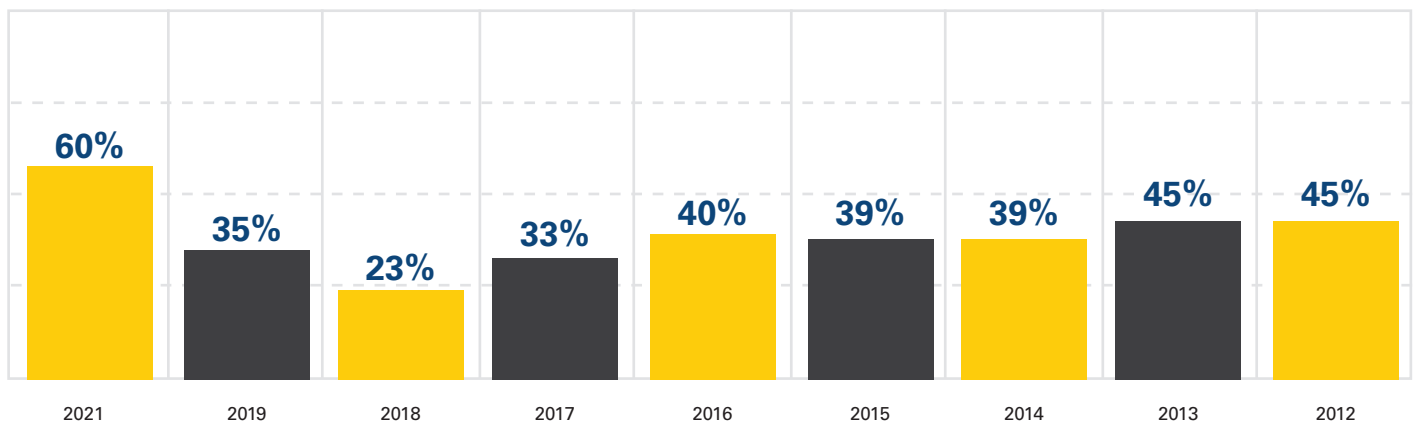
Select member comments:

- "Conference ticketing platform."
- "Digital conferences and meetings."
- "Digital events, increased our owned events portfolio."
- "Digital Studios, producers."
- "Filming for commercials, TV shows and movies."
- "Filming, hosting lot of film crews in our premises."
- "Government use."
- "Hybrid and virtual events, long-term tenancies."
- "Hybrid events: all the streaming and technological services."
- "Hybrid meeting model."
- "Installment of a Web Studio for digital streaming."
- "Long-term contracts for parking, storage."
- "New 'packages' have been developed with attractive rates."
- "New virtual studio, new market for movie shooting."
- "Off-site catering of meals."
- "Opened a restaurant and considering sale of prepared frozen food."
- "Outside public catering."
- "Rental for exam rooms."
- "Revenue for supporting virtual events, by offering a digital platform solution."
- "Services to go."

- “Testing and vaccination centre, only temporary income.”
- “Virtual conferences and virtual exhibitions.”
- “Virtual events.”
- “Virtual meetings.”
- “Webinar and online events.”
- “While we haven’t made a lot of revenue yet, we think our studio and virtual platform will drive more revenue in the future.”

Multi-Year Trends: Centres that Added a New Revenue Stream 2012 to 2021

During the most challenging periods in terms of the economy or other factors centres focus on adding new revenue streams and investigate different business models.



New Operational and Innovation Areas Instituted Over the Past Year

SURVEY QUESTION: HAVE YOU IMPLEMENTED ANY IMPORTANT NEW OPERATIONAL, MANAGEMENT OR SYSTEMS INNOVATIONS IN THE PAST YEAR?

Sixty percent of members say they implemented important new operational, management or systems innovations in the past year.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes	60%	56%	100%	33%	83%	75%
No	40%	44%	0%	67%	17%	25%

Members that added a new innovation were asked to briefly explain, and key themes in their comments are below:

- Health and safety related changes
- Digital and hybrid event and technology related innovations and partnerships
- Financial, facilities management and marketing related technology platform investments

Select write-in responses:

- "A platform to make fairs."
- "Additional partnership for live stream."
- "ASM Global VenueShield (COVID-Safe work program)."
- "Carbon footprint measure, hybrid events."
- "Covid-19 Care protocol and Covid-19 screen app."
- "Covid-19 protocols."
- "CovidSafe Plan, and virtual and hybrid conferencing."
- "Created a package 'Auditorium D', D for Digital, easy to understand, all in one for the client."
- "Development of new product: virtual conferences; Green Room."
- "Digital events."
- "Digital meeting platform for our Book Fair."
- "Digital services."
- "Health and safety protocol for event participants."
- "Live TV studio, agile management."
- "Mobile application, digitalization."
- "Multi-departmental short term project focused teams addressing specific ideas and opportunities."
- "New building automation system."
- "New ERP system."
- "New payroll, finance, rota, FM helpdesk and BMS systems."
- "New studio and virtual platform."
- "Partner to complete and diversify our venue experience with creative and innovative startups."

- “Related to our new venue.”
- “Remote work in general.”
- “Reorganization of operational teams, solutions and consulting services for sanitary and hybrid offers, startup incubation.”
- “Repurposing projects.”
- “The arrangements of pandemic related health protocols. Referring to government policy and regulations and AIPC and UFI good practice guidance Managing Covid-19 Challenges.”
- “We are looking at making our processes digital where possible.”
- “We are working on a new platform for the whole company what can offer different services and tools to our clients (exhibition and congress).”
- “We have a new project: a virtual plan of our three venues so that we can show every single room to our clients even if they can’t come in person for a site visit.”
- “We launched a new service for hybrid events.”

MULTI-YEAR TRENDS: PERCENTAGE OF MEMBERS WITH NEW INNOVATIONS 2017 TO 2021

Year	All %
2021	60%
2020	na
2019	39%
2018	38%
2017	52%



Revenue and Attendance Rebound Expectations to Match 2019 Levels

SURVEY QUESTION: WHEN DO YOU THINK YOUR CENTRE’S IN-PERSON EVENT AND GROUP BOOKINGS-RELATED GROSS REVENUE – AND TOTAL NUMBER OF EVENT AND GROUP BOOKINGS – WILL MATCH OR BE ROUGHLY EQUIVALENT TO THE LEVEL SEEN IN 2019 OR IN THE MOST RECENT PRE-PANDEMIC FISCAL PERIOD?

Not surprisingly, the forecasts are spread out over a multi-year period. Thirty-three percent of survey respondents, the highest percentage, feel that their centre gross revenue will reach 2019 levels in 2023, but a total of 36% expect this to happen in 2024 or 2025. The total event and group bookings outlook follows a similar pattern, e.g., only 25% of respondents expect a rebound to 2019’s bookings activity levels by the end of 2022.

	Gross Revenue	Total Event and Group Bookings
It already has matched 2019 level	0%	0%
First half of 2021	0%	0%
Second half of 2021	3%	2%
First half of 2022	6%	6%
Second half of 2022	12%	17%
2023	33%	35%
2024	21%	20%
2025	15%	12%
After 2025	6%	5%
Unsure	3%	2%

Annual Gross Revenue Growth Expectations Over Next Three Years

SURVEY QUESTION: BY WHAT PERCENTAGE ARE YOU FORECASTING YOUR FACILITY’S TOTAL GROSS REVENUES TO CHANGE ON AN ANNUAL BASIS, ON AVERAGE, OVER THE NEXT THREE YEARS?

Sixty-seven percent of members that responded to the survey indicated they feel it is simply too early to make this type of forecast. Yet, the members that did provide an estimated annual growth rate, on average, are expecting 17.3% annual top-line revenue growth over the next three years.

III. Venue Infrastructure & Technology Investments

This short but important section covers new building and expansion projects and how centres are investing in technology and enhanced communications to service hybrid events.

AIPC Members on Importance of Changing Facility Design, Layout and Inside Environmental Factors Post-Pandemic

SURVEY QUESTION: LOOKING OUT TO WHEN THE PANDEMIC IS PAST, HOW IMPORTANT DO YOU FEEL CHANGES TO CONVENTION CENTRES AND VENUES WILL BE IN TERMS OF FACILITY DESIGN, LAYOUT, INSIDE ENVIRONMENTAL FACTORS AND OTHER AREAS TO ACCOMMODATE POTENTIAL NEW SAFETY, SECURITY AND MEDICAL PROTOCOLS?

A total of 78% of members believe that making changes to facility design and layout to incorporate safety, security and medical protocols is either extremely or very important.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Extremely important, critical	24%	20%	0%	50%	33%	50%
Very important	54%	60%	50%	33%	33%	50%
Important	20%	17%	50%	17%	33%	0%
Not very important	2%	3%	0%	0%	0%	0%
Not at all important	0%	0%	0%	0%	0%	0%

Major New Building and Expansion Project Investments

SURVEY QUESTION: ARE YOU PLANNING A NEW BUILD, EXPANSION OR RENOVATION PROJECT CURRENTLY, OR IS ONE UNDERWAY?

Renovation projects are the most common in many areas of the world. Overall, only 27% of members say their centre organization currently has no new facility development, new build or renovation plans underway.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Renovation in planning stage	31%	38%	25%	0%	17%	25%
Renovation underway	25%	32%	25%	33%	17%	0%
New build project in planning stage	16%	24%	0%	0%	0%	25%
New build project underway	13%	14%	0%	0%	17%	0%
Expansion in planning stage	9%	6%	25%	33%	0%	0%
Planned project/building investment has been postponed	7%	6%	0%	0%	0%	50%
Expansion underway	5%	3%	25%	0%	17%	0%
No development plans currently	27%	21%	0%	33%	50%	75%

Multi-Year Trends: New Builds, Expansions & Renovations 2014 to 2021

Clearly, major centre investment project activity has decreased in the past year, but still only 27% of AIPC members say they have no important development-related investment projects either underway or in the planning stage. In short, centres are continuing to invest, especially as seen in other areas of this study, in digital content studios and related spaces enhanced with technology hardware and software.

	2014 %	2015 %	2016 %	2017 %	2018 %	2019 %	2021 %
New build	20%	10%	10%	22%	24%	21%	16%
Expansion	28%	31%	27%	24%	28%	30%	9%
Renovation	39%	41%	42%	45%	43%	41%	31%
No development plans	29%	37%	36%	28%	27%	29%	27%

Centre Spaces and Areas Most in Need of Enhancement and Investment

SURVEY QUESTION: WHICH SPACES AND AREAS IN YOUR VENUE NEED THE MOST ENHANCEMENT OR INVESTMENT?

The top three venue areas most in need of investment are considered to be technology infrastructure or services, meeting rooms and outdoor areas.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Technology infrastructure or services	56%	59%	25%	40%	83%	75%
Meeting rooms	42%	44%	50%	60%	17%	50%
Outdoor, outside areas	37%	34%	100%	40%	17%	25%
Exhibit halls	31%	31%	50%	40%	17%	25%
Signage	29%	28%	0%	40%	67%	25%
Ballroom(s)	21%	25%	50%	20%	0%	0%
Pre-function spaces	21%	16%	50%	20%	17%	50%
Loading dock and related areas	15%	16%	50%	20%	0%	0%
Client-facing food service areas and restaurants	15%	13%	25%	40%	17%	0%
Venue connections and links to transportation, such as shuttle bus and taxi areas	10%	9%	0%	40%	0%	25%
Kitchen(s)	8%	6%	0%	20%	17%	0%
Business centre	8%	6%	0%	0%	17%	25%
Venue connections and links to hotels or other key buildings	8%	6%	0%	20%	0%	20%
Other concession areas and store-fronts	4%	0%	25%	20%	0%	0%
Other	19%	16%	50%	0%	17%	0%

Multi-Year Trends: Centre Spaces and Areas in Most Need of Investment: 2015 to 2021 Comparison

The focus on investing in upgrading outdoor and outside areas has seen the biggest increase over the past year.

	2015	2016	2017	2018	2019	2021
Tech infrastructure, services	67%	54%	48%	50%	53%	56%
Meeting rooms	53%	58%	42%	46%	47%	42%
Outdoor, outside areas	22%	17%	20%	21%	28%	37%
Exhibit halls	44%	41%	37%	44%	41%	31%
Signage	36%	34%	35%	29%	37%	29%

Percentage of Centres Investing in New or Upgraded Digital Communications Technologies

SURVEY QUESTION: HAVE YOU OR ARE YOU PLANNING TO INVEST IN OR UPGRADE ANY OF THE FOLLOWING VENUE TECHNOLOGIES AND DIGITAL COMMUNICATIONS, ESPECIALLY TO ASSIST CLIENTS WITH HYBRID LIVE AND VIRTUAL EVENT PRODUCTION?

By far, the highest percentage of members are pursuing investments or upgrades to studio space for A/V and digital content production. And over 40% are investing in buying video cameras and/or have partnered with new or different AV or digital content providers.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Studio space for A/V, digital content, virtual event, etc. for content production	78%	87%	100%	67%	40%	75%
Telecommunications capacity/connections for live broadcast	51%	45%	25%	67%	60%	100%
Video cameras	41%	42%	25%	50%	60%	25%
Partnered with new or different AV or digital content partners	41%	45%	25%	67%	0%	50%
LED lighting, screen displays and/or graphic walls	37%	35%	50%	50%	60%	25%
Video and sound editing equipment and software	35%	35%	25%	33%	60%	25%
On-site support by professional technicians	31%	26%	0%	67%	20%	75%
New staff hires	22%	23%	0%	50%	40%	0%
Ballroom and meeting room or other space AV enhancements	20%	16%	50%	17%	20%	25%
Other specialty studio lighting systems	12%	6%	0%	17%	20%	25%
Other	8%	6%	0%	0%	20%	0%

IV. Post-Pandemic Reactivation & Recovery Plans

The key issue impacting the industry is how long will the recovery period take. Then, what will the industry look like further out, such as in 2023 and 2024? Included in this section are findings on the challenges to develop and implement post-pandemic in-person event plans and procedures, how social distancing challenges are being addressed, and changes in food and beverage services. Also covered is the issue of event postponements and rescheduling, and government programs to mitigate financial impacts of the pandemic on the industry.

Challenges to Develop and Implement Post-Pandemic In-Person Event Plans and Procedures

SURVEY QUESTION: WHAT ARE THE BIGGEST CHALLENGES RELATED TO DEVELOPING AND IMPLEMENTING POST-PANDEMIC LIVE IN-PERSON EVENT AND GROUP PLANS AND PROCEDURES?

Members feel that the biggest challenges related to developing and implementing post-pandemic live in-person event and group plans are forecasting in-person attendance/participation levels, corporate travel bans and restrictions, and changing government municipal rules, regulations, restrictions and protocols. Also an issue for over half of members is the challenge of forecasting event and group bookings demand over the next few years. The difficulty of forecasting attendance in tandem with corporate travel restrictions are of most concern to centres in North America, Australia/ New Zealand and Africa.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Forecasting in-person attendance/participation levels	68%	70%	100%	17%	100%	75%
Corporate travel bans and restrictions	68%	58%	100%	50%	100%	100%
Changing government municipal rules, regulations, restrictions and protocols	66%	64%	75%	50%	60%	100%
Forecasting event and group bookings demand	55%	48%	50%	50%	100%	75%
Cost of digital technology and AV production services	38%	33%	0%	50%	40%	100%
Budgeting	32%	30%	50%	17%	60%	25%
Available space in venues for social distancing	30%	33%	25%	0%	20%	75%
Cost of technology to improve health and safety plans	26%	18%	0%	33%	40%	75%
Lack of staff experience in these areas	25%	27%	25%	17%	0%	50%
Designing safe and appropriate event environments for distancing and attendee paths	21%	21%	0%	33%	20%	25%
Liability risk	19%	18%	25%	17%	20%	25%
Cost of PPE and health and safety equipment	17%	18%	0%	17%	20%	25%
Designing safe and appropriate plans for distancing around and within exhibits and temporary structures	15%	18%	0%	17%	0%	25%
Accessing accurate information and advice	11%	9%	25%	33%	0%	0%
Sourcing PPE and health and safety equipment	6%	3%	0%	17%	0%	25%
Other	2%	25%	0%	0%	0%	0%

How Social Distancing Challenges are Being Addressed

SURVEY QUESTION: HOW HAS YOUR ORGANIZATION BEEN ADDRESSING NEW SOCIAL DISTANCING CHALLENGES WITH SPACE DESIGN TECHNIQUES AND EVENT TECHNOLOGY?

This was an open-ended question asking for member comments. Common themes in the responses include:

- Using more CAD renderings and floor plan software usage
- Developed hall, meeting room and other area reconfigurations and dedicated usage plans
- Following government or health organization rules, recommendations and protocols
- Added dedicated physical space for AV and virtual event studios and technology
- Added hygiene and cleaning stations and areas
- Signage for health and safety rules and protocols
- Customizing plans for each event and group client

Select comments:

- "A lot more CAD."
- "Adapting with restricting guidelines."
- "All halls have been redesigned according to changing rules."
- "All the rooms meet quality standards in terms of audio-visual and security facilities. An upgrade of our videoconference system allows videoconferences via online platforms such as Webex. Our venue has large bright foyers and 3 entrances allowing a smooth guest flow management. A webcast studio will be launched soon, offering plug and play, streaming and videoconferences."
- "By adhering to local government health department regulations - space has not been an issue to date."
- "By Certification."
- "By Implementing the Cleanliness, Healthy, Safety and Environment Sustainability (CHSE Protocols) made by the Government."
- "Created a mobile AV studio, and dedicated a number of spaces to AV, virtual events, and partnerships with virtual event platforms."
- "Creation of new floor plans mapping current regulations over existing spaces. New catering service delivery methods implemented."
- "Floor plan design with social distancing in place, using multiple venues to stream live content into."
- "Floor plans are designed in 3D programs to visualize social distancing to clients, also virtual tours are available."
- "For each event we design a distance plan, we make different videos so that people comply with the protocols. We have a traceability report and disinfection stands."
- "Hybrid events, streaming. In the building: hand sanitizers throughout the building, safety distance signage at key points, signage displaying recommendations and health and hygiene measures, location of hygiene points, maximum ventilation using air from outside, Isolation area for possible Covid cases."
- "In some instances we link venues digitally, otherwise as per all of the standard guidelines."
- "Increase of ancillary spaces at client disposal."
- "Recognition cameras to count number of participants, do temperature checks and control PPE compliance. Signage and stickers for social distancing in common areas and conference rooms."

- “Seating is in line with Covid19 regulations, less people seated in a larger space.”
- “Thermal imaging gates to enhance flow of delegates. QR code registration of delegates. LED signage reminding delegates of their COVID responsibilities. COVID Safe messages over our intercom.”
- “Use current design program with new government restrictions for distances between tables, seats at tables and designated corridor travel patterns.”
- “We are now fully hybrid-by-design with streaming capabilities in every space.”
- “We have analyzed each event one-by-one and have provided tailor-made solutions for each event taking into account the government’s recommendations.”
- “We have invested heavily in technology and other safety products to help design our return and recovery initiatives.”
- “We have modular and flexible halls so it has been easy to comply to social distancing rules. As for event technology, we have had the total support of our AV partners.”
- “We have planned for distancing meetings with protocols in line with ASM Global Venue Shield.”
- “We have recommendations to the organizers but no rules, so we are flexible in designing according to the client’s needs.”
- “We use drawing software to draw the seat map to ensure the accurate social distancing.”
- “With our partner invested in studios and studio techniques. We have built up rooms with few seats with round tables.”

Food and Beverage Services Changes

SURVEY QUESTION: WHAT CHANGES HAVE YOU MADE OR ARE CONSIDERING TO MAKE TO YOUR FOOD AND BEVERAGE PROGRAMS AND OFFERINGS, ESPECIALLY FOR YOUR LARGEST MOST IMPORTANT EVENT AND GROUP CLIENTS?

This was an open-ended question asking for member comments. Common themes in the responses include:

- F&B staff usage of PPE, screens and barriers
- Rigorous cleaning procedures
- Individually served meals
- Packaged and boxed meals

Select comments:

- “All type of catering is currently prohibited. Once the new sanitary measures have been announced, our catering offer will be adapted accordingly.”
- “Bento boxes and less finger food.”
- “Buffets or stations where our caterer serves each guest individually, box lunches, surface disinfecting (before, during and after the event), constant hand washing, personal protective equipment.”
- “Catering will be served buffet style by chefs from behind screens.”
- “Clients currently cannot self-serve (e.g., buffets). Has increased staffing costs.”
- “Compulsory use of gloves and face mask. Staggered access and temperature control checks of the ancillary staff. Individual service. Increased cleaning during the service. Safety distance signage at key points.”

- "Create special package with boxes services."
- "Face-to-face eating and drinking is prohibited. We are taking measures against splashing by placing a plastic panels on tables. Buffet style is prohibited."
- "Have invested in technology and implemented programs that promote safety in F&B delivery."
- "Healthy and sustainable development."
- "Individual portions, more grab-and-go bags."
- "No buffets; prepackaged individuals servings; plated meals served with lids."
- "None so far."
- "Offering greater flexibility on the type and format of food service beyond local government regulations, if that is what the client requests."
- "Online ordering system to reduce waste and deliver."
- "Only seated F&B is possible."
- "Our catering company will offer the food wrapped in portions and with a lot more hygiene protocol standards."
- "Packed meals vs. banquet stations. Banquet stations - chefs serve vs. clients serving themselves."
- "Pre-packed healthy meal choices that appeal to senses. Instagramable."
- "Serving food in the buffet is highly un-recommended. Food now served by meal box, individual plating, or set menu."
- "Serving of pre-packed food, individual packing."
- "Sitting program with additional space at no cost."
- "We are adapting them to the pandemic regulations defined by the government as consumption has to be seated; we have increased also the 'packed lunch' options."
- "We are serving prepackaged food until we have a clearer indication of the market acceptance for other options."
- "We have changed the ways of serving food, for example, plates are covered with lid or plastic wraps, food are served with meal box."
- "We installed plexi walls to all our buffets and we offer more food which is pre-packed and individually wrapped. (a huge setback for our previous efforts in regards to sustainability)."
- "We use plexi walls, more catering staff, modified buffet tables, etc. Cost of this type of catering is definitely higher."
- "Will depend on the reopening rules from government on what is allowed; right now safety measures are in place (take-a-way lunches, bagged lunch; socially distanced)."

Government Programs to Mitigate Financial Impacts of the Pandemic on the Industry

SURVEY QUESTION: IN YOUR COUNTRY OR REGION, HAVE THERE BEEN ANY GOVERNMENT ACTIONS OR PROGRAMS SPECIFICALLY TO MITIGATE THE FINANCIAL IMPACTS OF THE PANDEMIC ON THE CONVENTION CENTRE, HOTEL, EVENT MANAGEMENT OR RELATED INDUSTRY SECTORS (I.E., AID FOR LOST REVENUE OR WAGES)?

Eighty-three percent of the survey respondents said their government has put in place actions or programs specifically to mitigate the financial impacts of the pandemic on the industry.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes	83%	81%	100%	83%	83%	75%
No	17%	19%	0%	17%	17%	25%

V. Client Trends & Requirements

How centres are working with event and group clients is covered in this section.

Client and Group Segments with Best Two-Year Growth Outlook

SURVEY QUESTION: WHAT TYPES OF EVENTS AND GROUPS DO YOU THINK WILL PROVIDE THE BEST OPPORTUNITIES FOR GROWTH OVER THE NEXT ONE TO TWO YEARS? (PLEASE CHECK ALL THAT APPLY.)

Local corporations are expected to be the top client segment over the next few years of recovery, followed by association conferences and meetings. Over half of members also expect that governmental-related events and meetings will be an important bookings segment. Association conferences are expected to be a key client category for centres in North America, Australia/New Zealand and Africa.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Local corporate meetings	72%	72%	75%	50%	83%	75%
Association conferences and meetings	66%	59%	75%	50%	100%	100%
Governmental events and meetings	51%	44%	50%	50%	83%	75%
Association conventions with exhibits	49%	47%	50%	50%	67%	75%
Entertainment events	49%	56%	75%	33%	67%	0%
National or International corporate meetings	42%	50%	25%	17%	67%	25%
Exhibitions, trade shows and trade fairs	30%	22%	50%	17%	67%	50%
Consumer and public shows	26%	28%	25%	33%	33%	25%
Sporting events	23%	22%	50%	0%	17%	50%
Other	9%	6%	0%	50%	0%	0%

Multi-Year Trends: Types of Clients and Groups with Best Growth Outlook: 2013 and 2018, 2019 and 2021 Comparison

Local corporate meetings and entertainment events serving regional consumers are expected to help lead the in-person event recovery period.

	2013	2018	2019	2021
Local corporate meetings	44%	51%	58%	72%
Association conferences	61%	62%	65%	66%
Government events	27%	37%	41%	51%
Association conventions with exhibits	67%	57%	69%	49%
Entertainment events	32%	37%	29%	49%
National and International corporate meetings	63%	77%	73%	42%
Exhibitions, trade shows	31%	47%	39%	30%
Consumer shows	35%	22%	22%	26%

How Centre Booking Contracts Have Changed

SURVEY QUESTION: AS A RESULT OF THE PANDEMIC, HAVE YOU MADE CHANGES TO YOUR BOOKING CONTRACTUAL LANGUAGE OR BUSINESS TERMS (I.E., CANCELLATION POLICIES AND PENALTIES, DATE CHANGE FLEXIBILITY, ETC.)?

Eighty-six percent of members have made changes to booking contractual language or business terms. Members in Europe and Africa have been the most likely to make contractual changes.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes	86%	92%	60%	67%	83%	100%
No	14%	8%	40%	33%	17%	0%

The members that have made changes to their booking contracts were asked to describe what has been changed. The key themes in the responses include:

- Overall more flexibility and willingness to negotiate on range of terms
- Pandemic-specific language added
- Cancellation and date change policies, often with more flexibility
- Different deposit requirements
- More specificity in contracts on range of areas

Select comments:

- “Added clause, event confirmation subject to government Covid pandemic rules, regulations and SOP’s.”
- “Additional flexibility on many aspects such as payment terms, date changes managed on case-by-case basis.”
- “Cancellation policies and penalties, date change flexibility.”
- “Cancellation policies and penalties, date change flexibility.”
- “Cancellation terms and cancellation fees, flexibility on postponements, flexibility on payment due dates.”
- “Covid clause for 2021.”
- “Covid-19 clauses. We have been flexible with deposits.”
- “Date change flexibility, negotiation of cancellation penalties.”
- “Date flexibility; cancellation policy.”
- “Depends on negotiations.”
- “Different clauses for Covid.”
- “Flexibility in cancellation of events.”
- “Flexible business terms to keep clients.”
- “For every confirmed booking before June 30th 2021, we apply very flexible postponement and cancellation conditions; clients can cancel or postpone free of charge.”
- “Force majeure, deposit structures, cancellation clauses.”
- “Included options for cancellation due to government directive.”
- “Mostly we consider to keep the deposit and reschedule the events in terms of refunding the deposit.”
- “Much more flexible with additional language for cancellations based on border closures and pandemic restrictions.”
- “Neither party shall be considered in breach of this Agreement to the extent that performance of their respective duties and obligations is prevented by Force Majeure.”
- “Postponement conditions.”
- “We added force majeure to cancellation policy on the contract for international clients
- “We allowed postponements without penalties if all the other contract clauses are accomplished and we are more flexible in payment conditions.”
- “We changed our cancellation policies and are more flexible with our repeated events.”
- “We have refunded / allowed cancellations as one time occurrence.”
- “We provide one year free of penalty postponement for events in 2021-2022.”
- “Zero cancellation fee on rental up to one month prior to event until September 2021.”

Pandemic-Related Legal Action with Clients

SURVEY QUESTION: IS YOUR CENTRE INVOLVED WITH ANY PANDEMIC-RELATED LEGAL ACTION WITH CLIENTS, EITHER INITIATED BY CLIENT(S) OR BY THE CENTRE (SUCH AS RELATED TO BOOKINGS CANCELLATIONS, POSTPONEMENTS, DEPOSITS OR REFUNDS, ETC.)?

Only 11% of AIPC members indicate that their centre is involved in pandemic-related legal action with clients.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes, initiated by client(s)	4%	6%	0%	0%	0%	0%
Yes, initiated by centre	9%	9%	25%	17%	0%	0%
No	89%	88%	75%	83%	100%	100%

New Procedures for Staggered Attendance Entry and Crowd-Control

SURVEY QUESTION: IS YOUR CENTRE OR ARE ANY EVENT AND GROUP CLIENTS REQUIRING TIMED OR STAGGERED ATTENDANCE ENTRY AND CROWD-CONTROL AT LIVE IN-PERSON EVENTS?

Thirty-one percent of members say that all events of a certain size are requiring timed or staggered attendance entry and crowd-control at live in-person events. Still, 40% say this is being applied to or requested by only some events and groups. This is of most importance to venues in Asia and Australia/New Zealand.

	All %	Europe	N. Amer.	Asia	Australia/ New Zealand	Africa
Yes, all events of a certain size	31%	29%	25%	50%	33%	25%
Yes, some events only	40%	48%	0%	33%	50%	25%
No	31%	26%	75%	17%	17%	50%

Most Challenging Event and Group Client Demands

SURVEY QUESTION: PLEASE DESCRIBE ANY NEW KEY CLIENT DEMANDS YOU ARE FINDING MOST CHALLENGING TO MEET GIVEN YOUR CURRENT RESOURCES?

Key themes in the member responses to this question include:

- Requests to project out situation into the future, e.g., into later 2021 and 2022
- How venue can assist with in-person and digital hybrid events
- Assistance with attendance participation forecasting
- Contractual issues and cost sharing requests

Select comments:

- "A lot of clients want to hear from us what the situation will be like in autumn this year or beginning of 2022 when it comes to social distancing and health and safety requirements."
- "At the moment hybrid events are the most challenging for us and for our clients so they are still going fully virtual."
- "Clients expecting venue teams to give insights into social distancing requirements one+ years from now."
- "Communications (5G)."
- "Cost sharing for sanitary measures."
- "Currently having discussions about use of testing or even vaccine passports. Nothing has been decided yet and no one knows how that would be paid for."
- "Customers want to hold events with large capacity."
- "Demands for bigger space than we can offer (because of the social distancing) "
- "Forecast the attendance of different events in order to be able to coordinate different clients in the same day."
- "Great flexibility with payment terms for postponing events."
- "Last minute decisions, holding event bookings much more longer than usual."
- "Limited budgets. Hotels and venue's competing for the same events due to events being limited to domestic business."
- "Long option."
- "Looking the Covid-19 safe and secure venue facility (including the human resources)."
- "Need to be flexible with constant changes of capacity and national border closures."
- "Organizing hybrid events, the need for two teams, knowledge and higher costs for the client."
- "Payment policies."
- "Personalized PPE, facilities and equipment (which comes at a higher cost to us) at a lower cost than pre-pandemic."
- "Postponement conditions."
- "Request to cancel up to the event and claim a full refund."
- "Restricted payment terms, changing of general terms and conditions, continuous date changes, discount

requests.”

- “Technology. Expectations for hybrid event delivery, and the support required to facilitate this from a venue, e.g., online attendee support demand for low-cost hybrid solutions, given the additional complexity and investment required, this can prove challenging. Various proposals required to reflect a customer’s own scenario planning. E.g., attendees online vs. attendees onsite, large audience vs. small audience. Other: Pressure to be flexible on contract terms, e.g., expectations for free cancellation. Flexibility on dates, given many customers now have pushed into the FY22 calendar. Budget negotiations. Clients looking for partnerships and sponsorships and access to grants / subsidies. Clients are looking for more information up front rather than arranging the smaller details at planning stage they are wanting to know all costs before signing. This means bringing in additional people such as SME’s into the negotiations. Contract clauses are being read more closely and amendments requested. This means more time spent sending to governance and legal for amendments.”
- “The most challenging demands is answering clients about what to expect for their events later in 2021. We don’t know how the pandemic will evolve and clients want to have their congresses and wants to have guarantees which we could not give.”
- “The most challenging demand is rescheduling.”
- “The price model of planning and make a digital and physical event.”
- “One major event hosted and the challenge prior to event was the multitude of agencies and entities who all wanted input on how to open the event. PCR validity rate is particularly challenging.”
- “Total flexibility for very little costs; sometimes does not feel like partnership as demands become exceedingly high (lower room rental but more space, more flexibility, very late or no commitment).”
- “Uncertainty of government rules and brand issues concerning safety of clients.”
- “Ventilating facilities. Infrared disinfection.”
- “We have to struggle to convince our clients to organize pre-production for hybrid or virtual events.”

Conclusion: Future Outlook & Additional Information Needs

It is still early in the reactivation and recovery process for most AIPC member organizations, and the pace of the rebound will vary around the world. Even within the same country, the pace may be impacted by different city and regional municipal restrictions and other factors impacting demand for live in-person events. As shown throughout this study, as the industry recovery gathers steam the next year will be another challenging period with event and group re-scheduling requirements, the need to customize health and safety plans with event clients, and the learning process related to using new technology, and serving clients, attendees and exhibitors in different ways. There are also still many unknowns about the pandemic and what demand for in-person events will be later in 2021, and in 2022 and beyond.

There is good news, too. There are indicators of significant pent-up demand for live in-person events of all types. Associations are very eager to meet in person again and major corporations need to get back to in-person experiential marketing efforts. Large majorities of business-people, professionals and consumers say in surveys they are looking forward to meeting others again at various types of events and gatherings in-person.

Also, absolutely critical is that the vaccines work very well, and large vaccination programs are well underway in many regions of the world. Many member venues are helping with this historic pandemic management and vaccination effort. The industry should be proud of the important role it is playing in these areas.

AIPC Members on the Industry Outlook

This Conclusion focuses on two open-ended survey questions posed to the members:

1. How do you think this challenging period will impact the future of the convention centre and events and meeting industry?
- and,
2. What information, services or practices do you recommend AIPC gather, provide or research further related to this challenging period for the industry?

For each of these questions the key themes in the dozens of comments are provided followed by select member comments.

How this Challenging Period Will Impact the Future of the Industry

SURVEY QUESTION: HOW DO YOU THINK THIS CHALLENGING PERIOD WILL IMPACT THE FUTURE OF THE CONVENTION CENTRE AND EVENTS AND MEETING INDUSTRY?

Key themes in the write-in responses include:

- Continued focus on health and safety in terms of facility design and usage
- Re-thinking venue spaces and types of usage
- Expectations that hybrid events will be the norm
- Search for new revenue streams and business models
- Need for staff with increased technology skills
- Increased use of digital tools and technology platforms
- Concerns about permanent loss of staff expertise at venues and other industry groups
- Expectation that there is still another year of pandemic-related disruptions and change
- Unknowns about the pace of the recovery

Select member comments:

- “A much clearer focus on health and well being, an emphasis on configurations which support networking and any aspect of interpersonal exchange which is unachievable in a virtual environment. A greater focus on all environmental and sustainability issues.”
- “Adaptable to re-purpose.”
- “Additional caution from government, increase image of uncertainty.”
- “Convention centres need to have staff with new skills to help clients by offering virtual solutions to complement their live events. Hybrid will be part of the future. Clients realize that there is an audience, a virtual one, they cannot waste. Keynote speakers will be better and will attend virtual. Outside areas will be a ‘must be’ option, but face-to-face will return.”
- “Convention centre’s will diversify business over the next year in order to meet revenue goals and to meet new norm business demands.”
- “Digitization jump in all procedures as well as services provided, convention centres will have to be more multifunctional and flexible and look for new revenue streams.”
- “Digitization, creativity and security are the main challenges we will face in the future. Technologies were around before the pandemic, and while they offer an alternative, they do not provide the same level of engagement as physical events. In this sense, face-to-face events will return with force in the near future.”
- “Even if travel restrictions are relaxed in the future, it will be more expensive to hold international conferences due to the reduction in the number of flights.”
- “Hard impacts on international congresses and corporate events last until next year minimum.”
- “Huge economic impact as we all wait to see whether attendance will return to pre-covid levels ... or not.”
- “Hybrid events will continue to be part of the congress center offer.”
- “Hybrid will be here to stay in some form, but the need for face-to-face will be even stronger when safe to meet.”
- “I believe that we will live with a generation of potential attendees and organizers who will have a subconscious fear/dislike of being in large groups indoors.”

- “I don’t know. Short term big impact. Long term less impact.”
- “I think our Industry will sadly get a bit smaller with more and more events switching to digital alternatives or being abandoned altogether.”
- “It is an opportunity to express the authorities the impact of our industry.”
- “It is the beginning of a new way to organize meetings and events.”
- “It will depend on the way in which each venue reinvents itself, if it is updated or not.”
- “The layoff of people will cause a loss in knowledge and expertise; new event formats will arise and centres need to be prepared for that and be more technology driven, clients will book more short notice and will want more flexibility).”
- “Less people, more tech.”
- “Maybe not all that much in the long run. Humans want and need to meet in person. People want to travel, share, etc.”
- “More and more in-person events are likely to go online or virtual in the future that will impact the revenue of the convention center.”
- “More complex and creating emotional events.”
- “More digital events.”
- “More emphasis on event design and technology for face-to-face, online and hybrid. Stronger need for partnerships and co-creation, with all stakeholders involved. More flexibility.”
- “Need to re-grow confidence in the merits of live events.”
- “Next few years will have a focus on local/regional events with national and international coming back in several years but perhaps with a different rotation period or multi-locations to reduce travel. More focus on environmentally sustainable travel and hosting of events.”
- “Not too badly in the long-term as the resilience is clear and attending events virtually is just not the same. However there will be a definite disinclination to travel in the short-term.”
- “Reduced number of event, higher quality, higher technical requirements.”
- “The impact is tragic for the meeting industry to all points of view. Hopefully the situation will improve in the next few months/years.”
- “The meetings industry is changed forever, digital is here to stay, less in-person delegates, more virtual.”
- “The ROI of events will be even more important to show for an organizer. The demand of new technology and skills of digital elements. Risk management and new terms and conditions of contracts.”
- “Unsure of the impact but clients and people want to return to face-to-face events. They will be nervous of travelling distances for some time yet.”
- “We will recover by 2023-24 first, looking forward a modest revenue in 2022. Booking window is changing: associations decide earlier than the corporate clients at the moment.”
- “With rollovers and rescheduling, the impact will feel like a quicker recovery than maybe expected but it will impact new bookings for a while. Although it could begin to lengthen the buying cycle. Time will tell.”

Other Information AIPC Should Research, Track and Provide to Members

SURVEY QUESTION: WHAT INFORMATION, SERVICES OR PRACTICES DO YOU RECOMMEND AIPC GATHER, PROVIDE OR RESEARCH FURTHER RELATED TO THIS CHALLENGING PERIOD FOR THE INDUSTRY?

Key themes in the write-in responses include:

- More sharing of best practices, case studies and success stories
- Access to event client requirements, concerns and experiences from around the world
- Crowd control and distancing procedures and recommendations
- New revenue and innovation models
- Staff training trends and best practices
- Technology and hybrid event management best practices, trends and recommendations

Select member comments:

- “A solid year-round conversation in AIPC community online. We need to learn from each other.”
- “As much detailed information as possible on what clients would prioritize as most important in terms of support from venues during the recovery phase and beyond
- “Business models and revenue possibilities for digital products from a venue point of view.”
- “Case studies.”
- “Clients needs in terms of technology post-pandemic.”
- “Crowd movement, broadcasting of conventions and the skills and materials venues require, as well as best techniques around multiple groups sharing a venue simultaneously and new best practices.”
- “Data how different venues in Europe have survived.”
- “Help the industry develop a framework to measure social and intellectual impact of events.”
- “How to effectively bid for business remotely.”
- “I think the most important thing is to be informed of what other countries/venues are doing so that we can all learn from others.”
- “I would like to know what kind of safety measures other facilities and flexible cancel policy has taken due to the influence of the corona virus. Are there any facilities that have benefited even in the influence of Covid-19? If so, what kind of business do they profited from?”
- “Information on how to improve air quality in buildings.”
- “Innovation examples.”
- “Maintain International networking by hybrid events conducted in some regions.”
- “More information about new technologies and sustainability.”
- “New pricing models.”
- “Opportunity lost for the industry due to pandemic in economic and social value terms.
- “Pre-registration processes and live conferences precautions around the world, to discover ‘best practice’ on staging Covid safe events.”
- “Pricing information (discounts or higher prices), changes in delegate numbers in the next two years, how to decrease costs efficiently.”



- “Provide good practice for performance of hybrid conferences.”
- “Re-purposing venue spaces that will no longer be needed.”
- “Risk Management: A new cancellation term standard that applies for all AIPC venues for larger events.”
- “Sharing the best experiences, ideas. Provide with data on economic impact worldwide and per region.”
- “Statistics on business lost, growth markets, innovations and trends, pivoting strategies, business diversification ideas that all centre’s could use.”
- “The issue of the hybrid events for rental revenue for the congress center.”
- “The same event policy in terms of restrictions on venue capacity should apply on a global scale and not per country, thus making it easier for international events to plan accordingly. Restrictions should not fluctuate as and when the President addresses the nation. We have experienced Covid19 for a year now, and everyone is aware of what the health and safety precautions are. Event capacity should be agreed upon on a global scale and set for 12 months at a time.”
- “There too many Covid-19 safety protocols that clients are experiencing from different source (venue, country, government). There is need for consistency to get policy and procedure to 100% conducive and acceptable.”
- “Training in new skills for staff; research on best practices of venues already doing events with large groups.”
- “We are interested to hear more about any new services or practices that can generate leads in the post-pandemic era.”
- “We would very welcome exchange platform on a regional basis.”
- “What are the clients point of view? AIPC could use the close relationship to our clients for a survey. (would make much more sense for AIPC to have a compact questionnaire and not every single congress center is asking the different clients. Benchmark for new pricing models.”
- “Would gather or determine how many centers are offering solutions to support hybrid events, not just as a stop-gap measure but going forward, post-Covid.”



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