



2022

# Member Survey

---

**Industry Re-Set & Recovery**

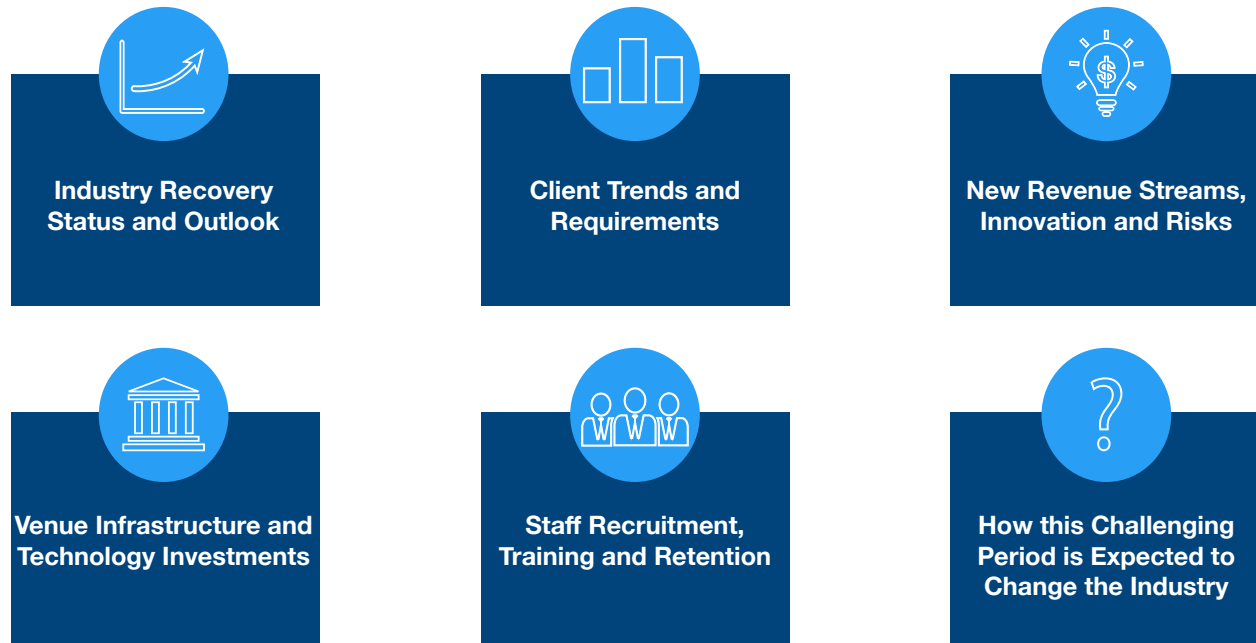
Insights / Benchmarks / Analysis

# Table of Contents

<b>INTRODUCTION</b>	3
<hr/>	
<b>EXECUTIVE SUMMARY</b>	4
<hr/>	
I. Industry Recovery Status and Outlook	10
<hr/>	
II. Client Trends and Requirements	15
<hr/>	
III. New Revenue Streams, Innovation and Risks	22
<hr/>	
IV. Venue Infrastructure and Technology Investments	28
<hr/>	
V. Staff Recruitment, Training and Retention	33
<hr/>	
<b>CONCLUSION: Member Comments on the Post-Pandemic Industry Outlook</b>	36
<hr/>	

## Introduction

Welcome to the 2022 edition of the annual AIPC Member Survey Report. This 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 steps centre management teams are taking to manage the industry re-start and recovery. The report focuses on the following 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 members around the world in April and May 2022. The survey received responses from 57 member venues.

It is understood that there are significant differences in the pace of the post-pandemic recovery 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 the member respondents for their invaluable contributions to this study.



# Executive Summary

After two difficult years for the global convention centre and events industry, as of mid-2022 there is finally a widespread sense of relief that the industry has stabilized (or is at least close to stabilization) and is poised for a period of growth and possibly even strong growth. Yet, many challenges remain, and there will be a multi-year process of recovery and rebound for the industry. It is also likely that various AIPC members will continue to experience this transition to growth at different paces.

While the outlook is good, it's important to note that 37% of members don't expect a full recovery to 2019 levels in terms of their total event and group bookings until the second half of 2023, and 31% expect this to be achieved in 2024 or 2025.

As shown below in Insight #3 in this Executive Summary, it's a mix of "good news, bad news" that members are more concerned about air travel issues and related challenges impacting attendance, as well as the challenges still related to event and group re-booking and re-scheduling process, than they are about a lingering pandemic impact on attendance especially at important congresses, conventions, business conferences and exhibitions, and other events that draw non-local attendees.

Unfortunately, members' top concern relates to major international conflicts (which the survey didn't ask about in 2021). There are also important issues related inflation impacting many areas of venue and event management as well as staffing challenges, both the loss of staff due to the pandemic and tight labor markets in many regions of the world. To say managing convention centres will remain a challenging job for years is an understatement.

Still, the power of live events, meetings and gatherings is unique and critical to individuals, organizations and communities. As one member commented in their survey response:

***"Human beings are social beings, and it is our belief that face-to-face meetings will thrive. The pandemic taught us the importance of technology and meeting differently."***

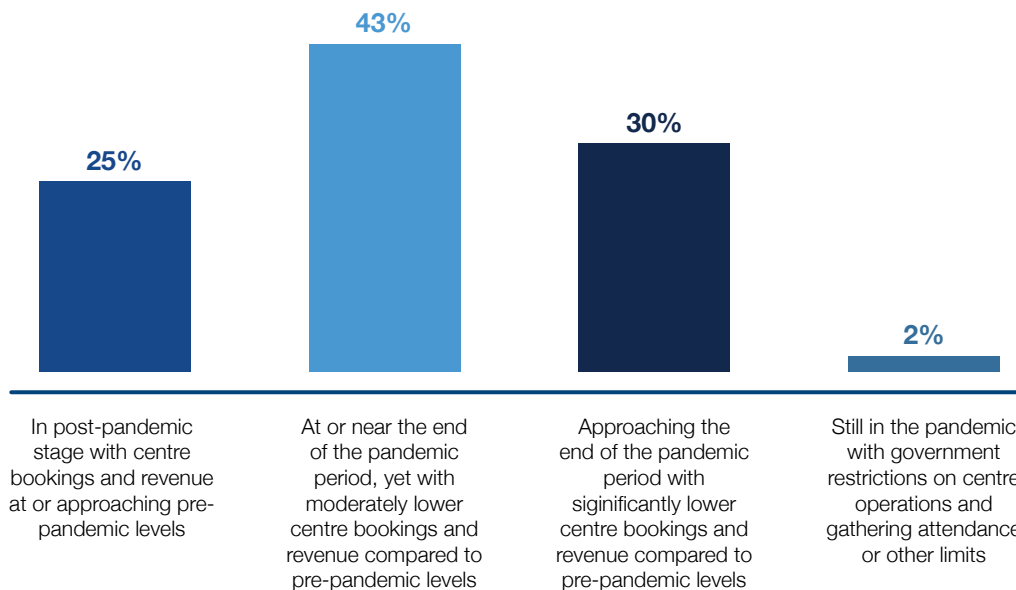
The industry has survived a truly terrible experience, and as many findings in this survey show, the outlook for a steady recovery and rebound is quite good – in fact, it's already well underway.

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

## INSIGHT #1: Over two-thirds of AIPC members are already at or getting close to a more “normal” pre-pandemic level of centre bookings and revenue

A total of 68% percent of AIPC members say their centre bookings and revenue are at or approaching pre-pandemic levels or that they are nearing the end of this period with moderately lower bookings and business levels. The survey question was: Currently, which of the following stages of the pandemic impact most apply to your centre?

### AIPC Members’ Pandemic Impact And Recovery Status



## INSIGHT #2: Worldwide the average in-person attendance recovery for events held in 2022 compared to 2019 has been 64%

Close to two-thirds of the attendance base (64%) at events and meetings held at member centres worldwide has returned to in-person events. The highest centre response to this question was 100%, and the low was 12%. This 64% average is similar to statistics gathered from leading event producers and meeting planners around the world from other organizations. The AIPC Member Survey data was collected in April and May of 2022. Last year’s survey found that important client events and meetings held in 2021 (up to about May of 2021) had recovered 58% of pre-pandemic attendance levels.

### Estimated 2022 And 2021 In-Person Attendance Recovery Percentage Vs. 2019 (April/May Periods In Each Year)

2022	2021
64%	58%

**INSIGHT #3: International conflict and air travel costs/disruptions are the biggest risks to convention centre business, according to members – the “good news” is that low attendance especially from non-local attendees is now a secondary concern**

The survey asked: What are the risks to growth related to your specific centre business? After war and other international conflicts and air travel concerns, event re-booking and re-scheduling challenges are rated the third top issue for centre management. Illustrating what a difference a year makes, the number one issue in the 2021 survey was, not surprisingly, “continued centre capacity restrictions and/or closures,” which was selected by 85% of members worldwide. To compare, this same issue was selected by 29% in the 2022 survey.

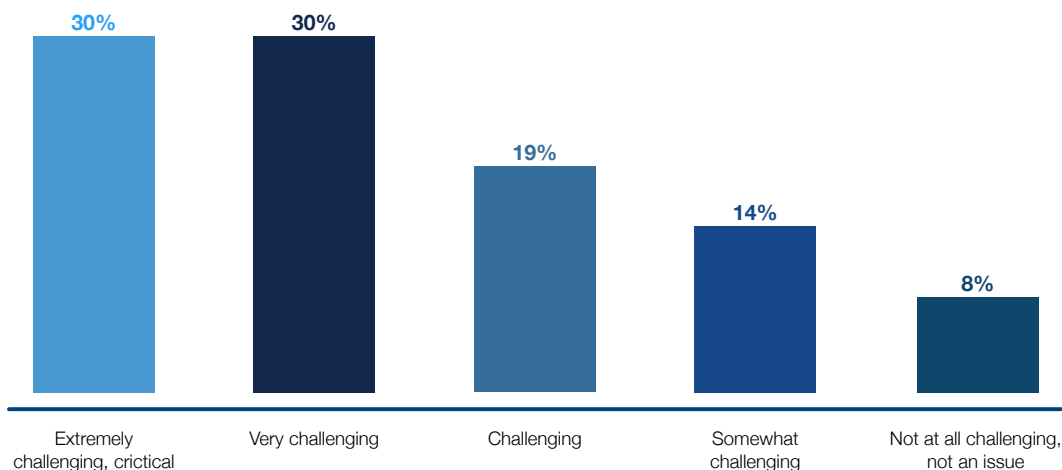
**Top Five Growth Risks To Centre Business: 2021 And 2022 Comparison**

Top Five Growth Risks		
International conflict	63%	<i>not asked</i>
Air travel issues (pricing, availability, airlift, route access, etc.)	61%	69%
Pandemic related: event and group re-booking, re-scheduling challenges	47%	71%
Pandemic related: low attendance especially from non-local attendees	42%	76%
Growing competition from other centres / regions	34%	33%

**INSIGHT #4: Sixty percent of members say recruiting and retaining suitable employees is extremely/very challenging**

Labor markets are tight in many parts of the world and member centres are being impacted. Some of the responses to the challenging labor market based on member feedback include streamlining the recruitment and on-boarding process often with technology, increasing salary, benefits and schedule flexibility, instituting referral programs, enhanced training, and using social media more to promote job opportunities.

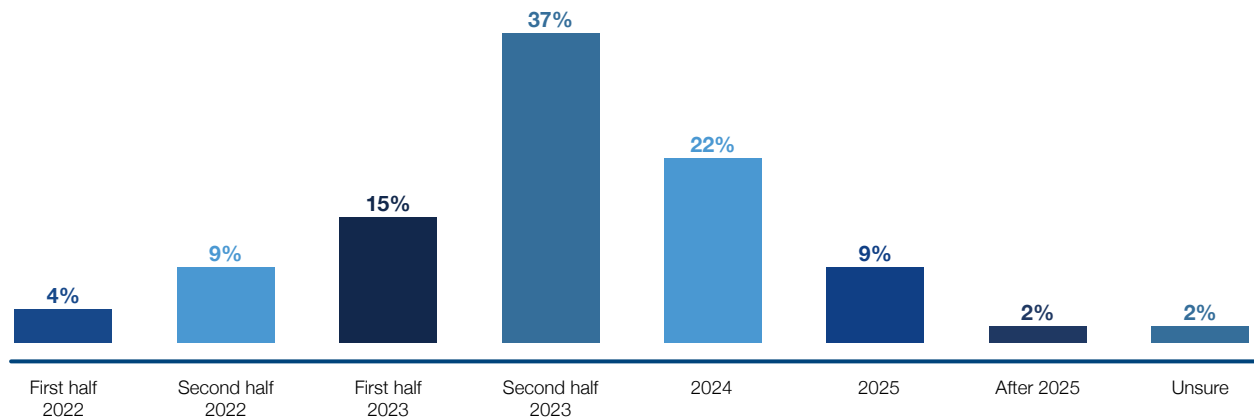
**How Challenging Are Labor Markets For Member Centres**



## INSIGHT #5: Sixty-five percent of members expect to see a full event and group bookings recovery back to 2019 levels by the end of 2023

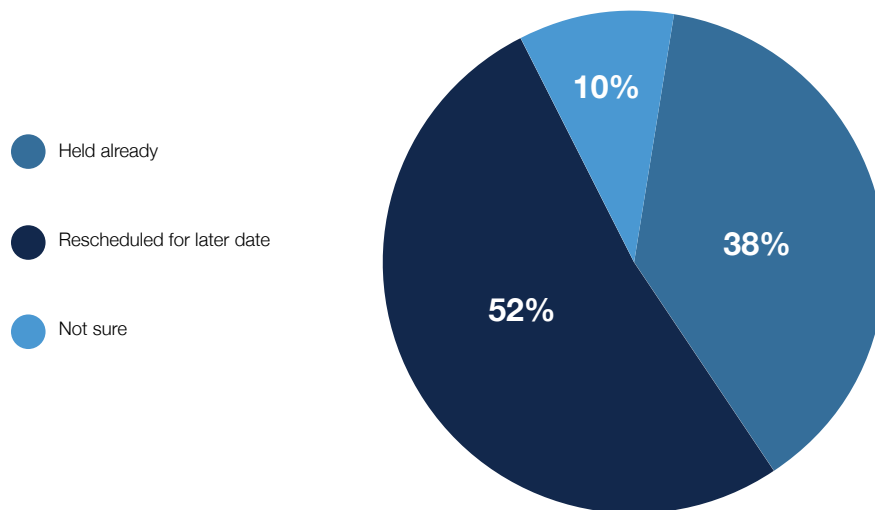
While 13% of AIPC members say by the end of 2022 they will have reached total event and group booking levels comparable to 2019, most of the membership see a longer recovery period to last into the end of 2023. This would mean that the overall impact of the pandemic on the industry will have been about a four-year experience. Thirteen percent expect an even longer recovery period or are unsure about the outlook.

### AIPC Members On When Total Event And Group Bookings Will Reach Pre-Pandemic Levels



## INSIGHT #6: Worldwide over half of postponed events have yet to be held again but are rescheduled for a later date – and only 38% have been held again already

Around the world, 38% of events and groups that had been postponed due to the pandemic have already been held, yet a sizable 52% of these are rescheduled for a later date. These findings are averages based on the member feedback. Working with groups to reschedule has been a major task for many centres around the world and it looks like this will continue for at least a year.



## **INSIGHT #7: How AIPC members see this challenging recovery period impacting the future of the industry**

### **Key themes on the industry outlook over the next few years include:**

- Some members expect a full rebound back to “normal” while others are more skeptical
- Staffing issues at centres, client groups and vendors are expected to continue
- There are still important questions around the attendance recovery outlook
- Technologies adopted during the past few years are expected to remain important
- The on-going need to adapt venue design and service offerings
- Continuous search for new revenue streams and business models

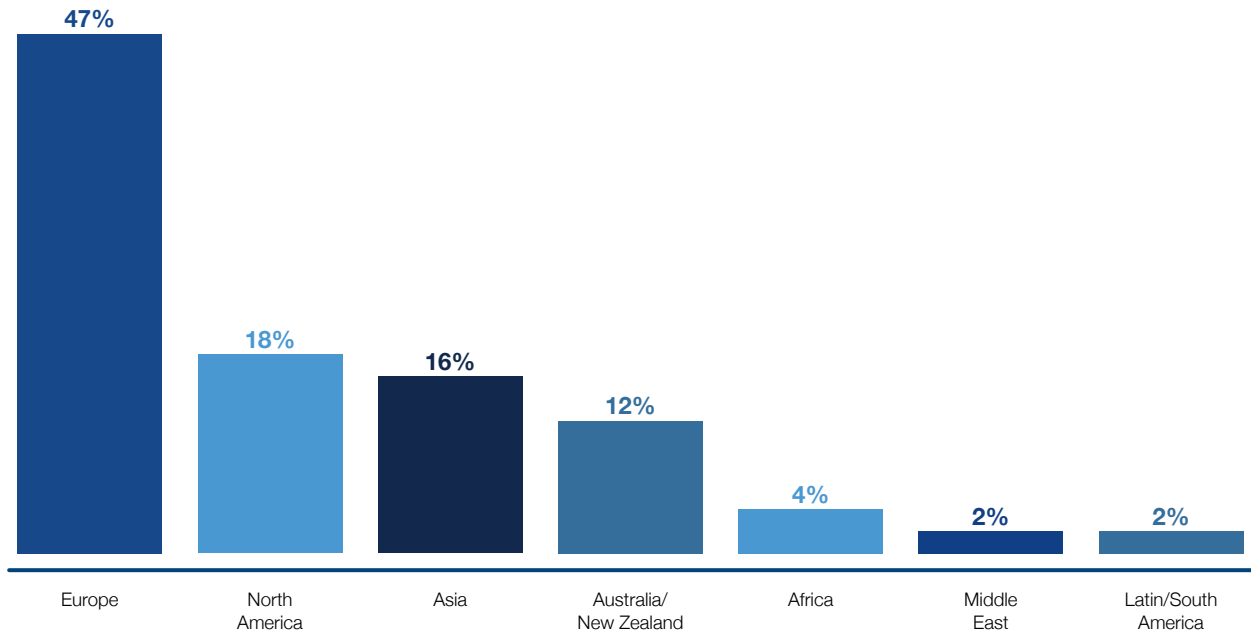
### **Select member comments:**

- “Business models need to be reinvented.”
- “Convention centres will need to stay ahead of technology trends.”
- “Difficult to say. It is more how the new ways of working (e.g., home office) will impact the meeting industry.”
- “Human beings are social beings, and it is our belief that face-to-face meetings will thrive. The pandemic taught us the importance of technology and meeting differently.”
- “It has made organizers and attendees realize that live meetings have the best business-to-business success potential.”
- “Meeting levels will return fully to pre-pandemic levels, but participants will be more selective about which type of events they will attend. Content will remain critical, and serendipity is key.”
- “More risk consciousness.”
- “Staff will be the biggest challenge in the next couple of years.”
- “We need to renew our offer constantly.”



## Member Survey Response by Region

Forty-seven percent of the survey respondents are European members, 18% are in North America and 16% are in Asia.



*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. Industry Recovery Status and Outlook

This section provides an update and analysis of where the membership is in terms of the industry re-start and recovery including how attendance in 2022 (up to the April and May period) compares to 2019. Also included are findings on the status of postponed and rescheduled events and when members expect revenue and bookings to recover to 2019 levels.

### AIPC Members' Pandemic Impact and Recovery Status

**Survey Question: Currently, which of the following stages of the pandemic impact most apply to your centre?**

A total of 68% percent of members say their centre bookings and revenue are at or are approaching pre-pandemic levels or are nearing the end of this period with moderately lower bookings and business levels.

	All %
In post-pandemic stage with centre bookings and revenue at or approaching pre-pandemic levels	25%
At or nearing the end of the pandemic period, yet with moderately lower centre bookings and revenue compared to pre-pandemic levels	43%
Approaching the end of the pandemic period with significantly lower centre bookings and revenue compared to pre-pandemic levels	30%
Still in the pandemic with government restrictions on centre operations and gathering attendance or other limits	2%

Recovery status breakouts by major regions of the world are provided in the tables below.

Europe: Pandemic Impact and Recovery Status	%
In post-pandemic stage with centre bookings and revenue at or approaching pre-pandemic levels	42%
At or nearing the end of the pandemic period, yet with moderately lower centre bookings and revenue compared to pre-pandemic levels	46%
Approaching the end of the pandemic period with significantly lower centre bookings and revenue compared to pre-pandemic levels	12%
Still in the pandemic with government restrictions on centre operations and gathering attendance or other limits	0%

<b>North America: Pandemic Impact and Recovery Status</b>		<b>%</b>
In post-pandemic stage with centre bookings and revenue at or approaching pre-pandemic levels		<b>0%</b>
At or nearing the end of the pandemic period, yet with moderately lower centre bookings and revenue compared to pre-pandemic levels		<b>56%</b>
Approaching the end of the pandemic period with significantly lower centre bookings and revenue compared to pre-pandemic levels		<b>44%</b>
Still in the pandemic with government restrictions on centre operations and gathering attendance or other limits		<b>0%</b>

<b>Asia: Pandemic Impact and Recovery Status</b>		<b>%</b>
In post-pandemic stage with centre bookings and revenue at or approaching pre-pandemic levels		<b>0%</b>
At or nearing the end of the pandemic period, yet with moderately lower centre bookings and revenue compared to pre-pandemic levels		<b>13%</b>
Approaching the end of the pandemic period with significantly lower centre bookings and revenue compared to pre-pandemic levels		<b>75%</b>
Still in the pandemic with government restrictions on centre operations and gathering attendance or other limits		<b>12%</b>

<b>Australia / New Zealand: Pandemic Impact and Recovery Status</b>		<b>%</b>
In post-pandemic stage with centre bookings and revenue at or approaching pre-pandemic levels		<b>14%</b>
At or nearing the end of the pandemic period, yet with moderately lower centre bookings and revenue compared to pre-pandemic levels		<b>57%</b>
Approaching the end of the pandemic period with significantly lower centre bookings and revenue compared to pre-pandemic levels		<b>29%</b>
Still in the pandemic with government restrictions on centre operations and gathering attendance or other limits		<b>0%</b>

## 2022 In-Person Attendance Recovery Percentage Compared to 2019

**Survey Question: Overall for events held in your centre so far in 2022, on a percentage basis, how has the total attendance level compared to a similar pre-pandemic period?**

Around the world, the average in-person attendance recovery for events held in 2022 compared to 2019 has been 64%. The highest centre response to this question was 100%, and the low was 12%. The average reported by European members was 72%. This 64% worldwide average is similar to statistics gathered from leading event producers and meeting planners around the world from other organizations. The AIPC Member Survey data was collected in April and May of 2022. Last year’s survey found that important client events and meetings held in 2021 (up to about May of 2021) had recovered 58% of pre-pandemic attendance levels.

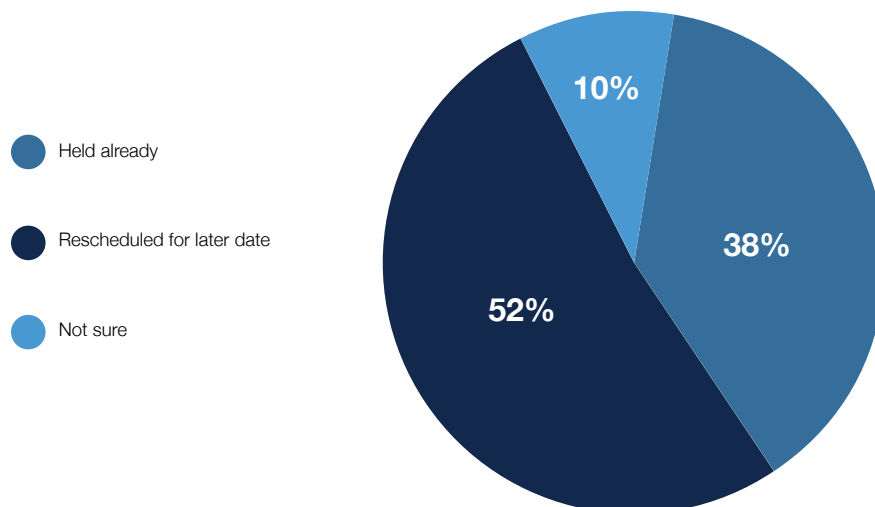
### Estimated 2022 and 2021 In-Person Attendance Recovery Percentage vs. 2019 (April/May Periods in Each Years)

2022	2021
64%	58%

## Status of Postponed and Rescheduled Events and Groups

**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? (Please estimate if necessary.)**

Around the world, 38% of events and groups that had been postponed due to the pandemic have already been held, and a sizable 52% of these are rescheduled for a later date. These findings are averages based on the member feedback. Working with groups to reschedule has been a major task for many centres around the world and it looks like this will continue for at least a year.



## 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 (58%) indicate they see economic activity in their region as moderate. Twenty-one percent say they are seeing strong growth, and 18% say it is weak in their region.

	All%	Europe	North America	Asia	Australia/ New Zealand
Strong growth/activity	21%	29%	50%	0%	0%
Moderate	58%	57%	50%	29%	100%
Weak	18%	14%	0%	57%	0%
Very weak, flat to no growth	0%	0%	0%	0%	0%
Negative growth, recession	3%	0%	0%	14%	0%

## When Will Centre Revenue and Bookings Recover to 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?**

Sixty-five percent of members expect to see a full event and group bookings recovery back to 2019 levels by the end of 2023. This would mean that the overall impact of the pandemic on the industry will have been about a four-year experience. Thirteen percent expect an even longer recovery period or are unsure about the outlook. It is interesting to compare the gross revenue rebound expectations vs. the event and group bookings statistics. It looks like there’s more of a “barbell” expectation overall in terms of gross revenue recovery, with some centres forecasting an earlier recovery, while others see this happening later in 2024 and into 2025. There is more concentration around expectations for the timeline when the number of event and group bookings will be back to 2019 levels.

	Gross Revenue	Total Event and Group Bookings
It already has matched to 2019 level	0%	0%
First half of 2022	5%	4%
Second half of 2022	16%	9%
First half of 2023	9%	15%
Second half of 2023	28%	37%
2024	26%	22%
2025	12%	9%
After 2025	2%	2%
Unsure	2%	2%

## II. Client Trends and Requirements

How centres are working with event and group clients is covered in this section, along with how attendees are changing.

### What's Working – and Not Working – with Client Groups as Industry Re-Starts

**Survey Question: Over the past year, what has stood out to you both “pro” and “con” in terms of working with your most important event and group management clients? What has been working well – and not working well – in terms of the industry re-start?**

### What's Working Well – Key Themes in the Member Responses

- Client communications and relations
- Flexibility and willingness to make changes
- Clients and attendees/exhibitors pleased to be back meeting in-person
- Overall accordance with health and safety procedures

### Select member comments:

- “Additional AV requirements for bolt-on hybrid/streaming/recording with our in-house service offering.”
- “Better process, as we used lockdown period to improve our operating processes.”
- “Clients are more flexible with their venue requirements and abide by the health and safety protocols that are in place.”
- “Collaboration and excitement of return to events.”
- “Flexibility by both parties, the desire to do things differently to reach a common goal of bringing face-to-face events back.”
- “Recognition from corporate and association clients that face-to-face events are important for their future business i.e., the convention industry has a positive future.”
- “Reinforced relationship with the client through more detailed discussions about the events and industry, sharing of challenges, and negotiations are becoming easier because discussions are more open.”

## What's Not Working Well/Needs Improvement – Key Themes in the Member Responses

---

- Still some caution about return to in-person events in some sectors/segments
- Late decisions and changes made by clients and attendees
- Cost increases and supply chain issues
- Short staffing issues impacting some event producers and vendors

### Select member comments:

- “A lot of talk about returning to live events but slow to sign contracts. Senior stakeholders cautious about returning to business travel and the HR risks of staff travel and live events exposing them to COVID-risk scenarios.”
- “Border closures, confidence and mixed messaging.”
- “Cancelling rather than postponing event.”
- “Clients are expecting discounted pricing and requesting contract clause changes to manage their risk.”
- “Clients finding attendees are booking at the last minute, makes it hard for them to plan final numbers, and pressures catering ordering timelines. Supplier timelines and price increases also a challenge.”
- “Contact tracing and adhering to mask mandates.”
- “Cost prices are getting higher effecting prices.”
- “Covid restrictions different in each country, flight limitations.”
- “Decisions on contracts are getting more and more delayed.”
- “Development of technical and digital services from all providers and strong competition as a result.”
- “Employment of skilled gig workers.”
- “Event postponement creating challenge to the event calendar, events with similar theme may have to be squeezing into shorter time gap.”
- “Expectations on costs and service levels.”
- “Flight limitations.”
- “Inability to visit clients, rising costs due to hybrid meetings, inability for international clients to conduct site visits.”



- “Lack of staff.”
- “Last minute cancellation and negotiation of penalty.”
- “Last minute changes.”
- “Low staff levels.”
- “Resources, understaffed suppliers and organizers.”
- “Restrictions by law and always much too short planning horizon.”
- “Shorter lead times, workforce constraints.”
- “Short-term decisions.”
- “Staff expertise has disappeared and/or relocated interstate.”
- “Stop-and-go-stop-and-go-stop strategy of the government.”
- “Supply chain issues for both clients and centre has been an issue.”
- “Understanding of hybrid and costs inherent to multiple forms of meeting.”

## Client and Group Segments with Best Near-Term 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.)**

National and international corporations are expected to be the top client segment over the next few years of recovery, followed by association conventions with exhibits. Over half of members also expect local corporate meetings will be an important bookings segment.

	All %	Europe	North America	Asia	Australia/ New Zealand
National or international corporate meetings	65%	70%	50%	57%	50%
Association conventions with exhibits	57%	55%	50%	43%	75%
Local corporate meetings	54%	55%	75%	71%	25%
Association conferences and meetings	49%	50%	50%	29%	100%
Entertainment events	46%	50%	0%	57%	50%
Exhibitions, trade shows and trade fairs	41%	30%	25%	57%	50%
Governmental events and meetings	41%	30%	0%	71%	50%
Consumer and public shows	30%	10%	100%	43%	50%
Sporting Events	24%	15%	75%	29%	0%
Other	0%	0%	0%	0%	0%

## Multi-Year Trends: Types of Clients and Groups with Best Growth Outlook: 2021 and 2022 Comparison

National and international corporate meetings and to a lesser extent exhibitions have received the largest sentiment increase over the past year in terms of specific types of events and group sectors with a positive outlook according to members. This suggests sentiment is getting closer to a more normal industry structure, especially when considering the positive outlook noted by over half of the members on major association-owned conventions with exhibits (which are often considered “exhibitions” as well).

	2021	2022	Differential
National and International corporate meetings	42%	65%	+23%
Association conventions with exhibits	49%	57%	+8%
Local corporate meetings	72%	54%	-18%
Association conferences	66%	49%	-17%
Entertainment events	49%	46%	-3%
Government events	51%	41%	-10%
Exhibitions, trade shows	30%	41%	+11%
Consumer shows	26%	30%	+4%

## Client and Group Booking Incentives and Discounts

**Survey Question: Are you engaging in more incentive or subvention activities (i.e., rent reductions, added value services, cash incentives, hosted functions) than pre-pandemic?**

Fifty-seven percent of members say they are engaging in more incentive or subvention activities such as rent reductions, added value services and cash incentives than before the pandemic.

	All %	Europe	North America	Asia	Australia/ New Zealand	Africa
Yes	57%	26%	75%	71%	100%	100%
No	43%	74%	25%	29%	0%	0%

## What's Particularly Working to Book Events and Client Groups

**Survey Question: What's been working the best in terms of your event client bookings sales and marketing efforts, and your efforts with key partners such as DMO/CVB and hotels?**

**Some of the key themes in this open-ended question include:**

- Close collaborations between centers and CVB/DMOs and key partners
- More flexible contract terms especially related to cancellations and postponements
- More frequent client communication
- Different marketing messaging
- Special offers and incentives to key events and groups

### Select member responses:

- "Cash back incentives."
- "Clients are eager to come back with face-to-face meetings and events. CVB support is crucial and has been instrumental to incentivize clients to hold events."
- "Closer alignment and support of each other."
- "Collaborative efforts and reducing the cancellation risk to event planners."
- "Connection with key partners such as PCO's and agencies and also focus on client and on their needs."
- "Destination presentation."

- “Flexibility.”
- “Government subsidies, relaxation on social distancing measures.”
- “Higher collaboration.”
- “Hybrid City Alliance.”
- “Joint marketing events (i.e., client engagement events) were hosted with PCOs.”
- “Key account relationships have been reinforced, repeat business is increasing.”
- “Messaging we are safe, open and ready for business. Sharing of COVID safe plans. Hybrid/virtual marketing. Adapted T&Cs to better partner with customers.”
- “Partnership with our bureau, partnership with hotels located walking distance, client meetings during fairs, newsletter.”
- “Partnership, collaboration. Tailor-made packages.”
- “Personal account management from our commercial team.”
- “Service.”
- “Social networks.”
- “Special subvention for pandemic from CVB.”
- “Subvention and marketing support.”
- “Subvention offer, National funding, travel discounts with travel providers.”
- “Suggesting options for hybrid meetings that include countermeasures for COVID-19, acquiring GBAC STAR accreditation.”
- “That we must all share the regrowth ‘pain’ as we trade back to pre-pandemic levels.”
- “Value offerings and destination marketing with our CVB /DMO and hotels.”
- “We both manage the conference centre and act as destination CB. We are also partner (50%) of appointed DMO.”
- “We have been able to participate in more sales missions with our CVB at no to little cost.”

## How Attendees are Changing

**Survey Question: Overall, besides social distancing behaviors, what are the most important ways attendees are changing?**

### Key response themes include:

- Making decision to attend much closer to the event dates
- More engaged when on-site
- Part of decision to attend seems impacted by virtual/digital options
- International attendance is down
- Many people seem to be back to pre-pandemic behaviors, while others are more cautious and still masking, etc.

### Select comments:

- “Attendee expectation around digital experience has grown, as has the need for greater visitor experience in the context of informed risk for attending events during a pandemic.”
- “Attendees always have an option to attend an event virtually.”
- “Decline in international attendees.”
- “Delay in contract signatures; for professional education meetings/seminars a significant portion remains online/hybrid.”
- “If people attend an event, they truly maximize the business/meeting opportunities. They don’t just fly in and fly out. Time has to be well spent.”
- “Last minute booking and cancellation, mostly driven by changing restrictions and status of the pandemic cases.”
- “No real change, we see people doing the same, when they come back.”
- “People are quickly getting back to pre-covid behaviors. While still worried about covid, they are happy to be in groups and move around. We have no restrictions in place at the moment, so it feels back to ‘normal.’”
- “Purpose of meetings, meeting formats, meeting architecture (have been reviewed or changed).”
- “We see great enthusiasm to return. Some still wear PPE which we continue offer to all groups.”

### III. New Revenue Streams, Innovation and Risks

Various new revenue streams and types of innovations added by members are covered here, along with the primary risks to centre business. The impact of inflation is also tracked.

#### New Revenue Streams

**Survey Question: Have you added any new important revenue sources in the past year?**

Forty-three percent of members say they added at least one important new revenue source in the past year. This is down from 60% found in the 2021 survey. From 2020 to 2021 many centres booked new revenues related to government transfers from pandemic-related health services and by offering new technology and communications services. Many of the new revenue streams noted in this new survey noted below also related to technology-related services.

	All %	Europe	North America	Asia	Australia/ New Zealand	Africa
Yes	43%	38%	25%	57%	33%	100%
No	57%	62%	75%	43%	67%	0%

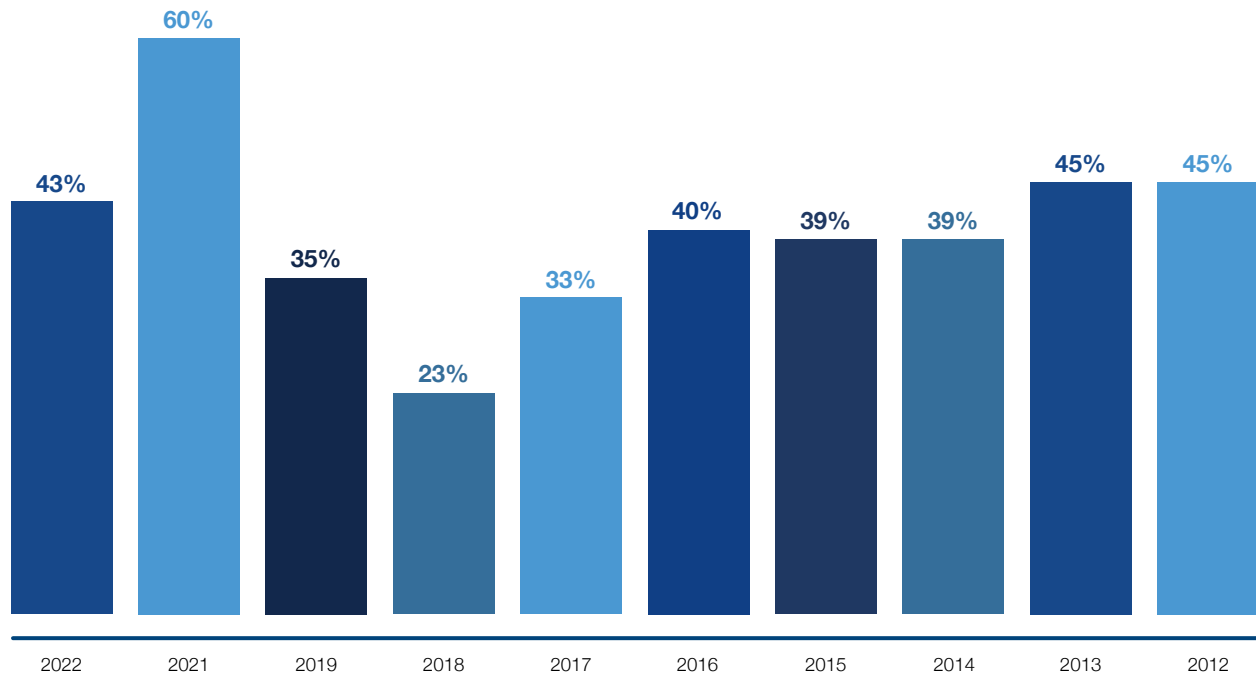
#### Verbatim responses:

- “All in One solutions. We help the client with all the services at the venue and also outside, including hotels and social events.”
- “Commission-based agreements and joint ventures as well as virtual and hybrid offerings.”
- “Digital branding, outside catering, film/advertising shoots.”
- “Digital event platform and office space rentals.”
- “Digital media inventory throughout the venue, with additional sales as a result of the investment.”
- “Digital package, package deal/pricing for event services.”
- “Digital studio for hybrid.”
- “Hybrid packages.”

- “Hybrid services.”
- “Hybrid technology.”
- “Increase in use of permanent high-speed internet connection option.”
- “LED wall rental.”
- “More event services: event media coverage, event staffing.”
- “Sales of F&B with drive thru and grab food channels.”
- “Vaccination centre.”
- “Western Diversity Funding, Provincial Recovery Grant.”

## Multi-Year Trends: Centres that Added a New Revenue Stream 2012 to 2023

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.



## Innovations Made by Centres in the Past Year

**Survey Question: Have you implemented any important new operational, management or systems innovations in the past year?**

Overall, centres have been more likely to institute a new innovation or operational or management idea than a new revenue stream over the past year. This is understandable as client demand and revenue has been under pressure, and 2021 was the true “re-start” for most centres around the world. Seven out of ten members say they added a meaningful innovation in the last year and many of these have been related to or driven by technology.

	All %	Europe	North America	Asia	Australia/ New Zealand
Yes	70%	67%	50%	100%	67%
No	30%	33%	50%	0%	33%

### Verbatim responses describe many of the innovations and new ideas:

- “As the new convention center, we have invested a lot for technology and sustainability project.”
- “Central planning function across content types.”
- “CMS system for our digital inventory.”
- “Digital events.”
- “Digital signage.”
- “Digital signage, Team Hybrid, outdoor areas.”
- “Digital studio for hybrid.”
- “Facial recognition for in-house food promotion event.”
- “Healthy venue label.”
- “New agile operating model, organizing teams around customer segments and needs. Also, an uplift to our Core Systems for event and financial management.”
- “New inhouse communication systems, new management system.”
- “Outsourcing services.”



- “Robot cleaning.”
- “Security system.”
- “Set-up of digital studio, livestream services.”
- “Skilling staff to multi-task, co-working space, catering partnerships.”
- “Smart Capacity Model.”
- “Studio system and streaming service.”
- “Teams, System Innovation CRM Dynamics.”
- “Totally redesigned F&B offerings.”
- “Venue management and marketing software within all departments.”
- “VenueShield Health and Hygiene protocols.”
- “Virtual immersive experiences in our venues.”
- “Virtual Studio.”

### Multi-Year Trends: Percentage of Members with New Innovations 2017 to 2022

Year	All %
2022	70%
2021	60%
2020	N/A
2019	39%
2018	38%
2017	52%

## Specific Risks to Convention Centre Business

### Survey Question: What are the risks to growth related to your specific centre business?

International conflict and air travel costs/disruptions are the biggest risks to convention centre business, according to members. The “good news” is that low attendance especially from non-local attendees is now a secondary concern. Besides war and other international conflicts, event and group re-booking and re-scheduling challenges are rated the third top concern. Illustrating what a difference a year makes, the number one issue in the 2021 survey, not surprisingly, was “continued centre capacity restrictions and/or closures,” which was selected by 85% of members worldwide. To compare, this same issue was selected by 29% in the 2022 survey.

	All %
International conflict	63%
Air travel issues (pricing, availability, airlift, route access, etc.)	61%
Pandemic-related: event and group re-booking, re-scheduling challenges	47%
Pandemic-related: low attendance especially from non-local attendees	42%
Growing competition from other centres / regions	34%
Replacement of events with online alternatives	34%
Pandemic-related: continued centre capacity restrictions and/or closures	29%
Hotel availability and pricing	26%
Government / corporate restrictions on meetings	26%
Pandemic-related: increased costs for health, safety, physical distancing and/or technology investments	24%
Sustainability, environmental concerns	24%
Overall economic strength	24%
Pandemic-related: low demand from traditional event clients and groups	16%
Pandemic-related: legal issues, major disagreements and/or negotiations	16%
Increases of corporations and individuals using digital media and communications	16%
Changing government priorities	13%
Immigration or visa requirements limiting access	13%
Reputational issues	0%
Other	13%

## Inflation Impact

**Survey Question: Have any of your core venue management budget areas or event services related costs increased considerably by 15% to 20% or more over the past 12 months?**

Over half of members worldwide are experiencing some level of inflation, with this more pronounced in Europe and Australia/New Zealand. The main cost categories rising the fastest are electricity, energy and food.

	All %	Europe	North America	Asia	Australia/ New Zealand	Africa
Yes	57%	68%	25%	29%	67%	100%
No	43%	32%	75%	71%	33%	0%

### Verbatim responses:

- “10% increase including staff and supplies, especially food and beverage.”
- “Contracted labor cost.”
- “Costs from suppliers have increased on some items up to 40%.”
- “Electricity, venue maintenance.”
- “Electricity, carpet, materials for stand construction.”
- “Energy.”
- “Energy costs.”
- “F&B costs, suppliers costs, and agency staff are at a all-time premium.”
- “Food and beverage costs and safety/COVID compliance costs and cleaning costs.”
- “Gas or electricity.”
- “Increase in food ingredients cost, packaging for take away, pandemic related consumable such as gloves, masks, as well as logistic cost for supplies.”
- “Operational and labor costs.”
- “Staff costs for running hybrid and traditional events due to re-design and smaller meeting sizes.”

## IV. Venue Infrastructure and Technology Investments

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

### Major Capital Projects: New Builds, Expansions and Renovations

**Survey Question: Are you planning a new build, expansion or renovation project currently, or is one underway?**

The level of major capital investment in buildings and expansions has dropped off over the past few years, after literally decades of strong growth. Even before the pandemic in many sectors and especially North America, major investments were slowing. But still 37% of members say they currently have a renovation project underway, and 18% have an expansion project in the planning stages.

	All %	Europe	North America	Asia	Australia/ New Zealand
New build project underway	16%	14%	0%	14%	25%
New build project in planning stage	11%	10%	0%	0%	25%
Expansion underway	3%	0%	0%	0%	25%
Expansion in planning stage	18%	19%	0%	29%	25%
Renovation underway	37%	38%	25%	57%	25%
Renovation in planning stage	16%	19%	0%	29%	0%
Planned project/building investment has been postponed	11%	19%	0%	0%	0%
No development plans currently	26%	29%	75%	0%	0%

## Multi-Year Trends: New Builds, Expansions & Renovations 2014 to 2022

Clearly, major centre investment project activity has decreased since 2019, but still only 26% of AIPC members say they have no important development-related investment projects either underway or in the planning stage (meaning, 74% do in fact have a project in process or in their sights). 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	2022
New Build	20%	10%	10%	22%	24%	21%	16%	16%
Expansion	28%	31%	27%	24%	28%	30%	9%	3%
Renovation	39%	41%	42%	45%	43%	41%	31%	37%
No development plans	29%	37%	36%	28%	27%	29%	27%	26%

## Venue Spaces and Areas in Most Need of 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 technology infrastructure or services, signage and meeting rooms.

	All %	Europe	North America	Asia	Australia/ New Zealand
Technology infrastructure or services	44%	47%	0%	71%	25%
Signage	39%	37%	50%	29%	50%
Meeting Rooms	36%	37%	25%	71%	0%
Exhibit halls	33%	32%	25%	71%	0%
Outdoor, outside areas	33%	53%	25%	14%	0%
Client-facing food service areas and restaurants	22%	26%	25%	29%	0%
Kitchen(s)	19%	16%	0%	29%	25%
Other concession areas and store-fronts	19%	21%	0%	29%	0%
Pre-function spaces	17%	11%	50%	29%	0%
Venue connections and links to transportation, such as shuttle bus and taxi areas	17%	21%	0%	29%	0%

Ballroom(s)	14%	16%	0%	29%	0%
Loading dock and related areas	11%	5%	0%	29%	0%
Business centre	8%	5%	0%	14%	25%
Venue connections and links to hotels or other key buildings	6%	0%	0%	29%	0%
Other	17%	16%	0%	0%	75%

### Multi-Year Trends: Centre Spaces and Areas in Most Need of Investment: 2015 to 2022 Comparison

The focus on investing in upgrading signage has seen the biggest increase over the past year. The focus on signage ties into digital transformation efforts, enhancing the client and attendee experience, as well as the opportunity to drive advertising revenue.

	2015	2016	2017	2018	2019	2021	2022
Tech infrastructure, services	67%	54%	48%	50%	53%	56%	44%
Signage	36%	34%	35%	29%	37%	29%	39%
Meeting rooms	53%	58%	42%	46%	47%	42%	36%
Outdoor, outside areas	22%	17%	20%	21%	28%	37%	33%
Exhibit halls	44%	41%	37%	44%	41%	31%	33%

## Venue Technologies and Digital Communications Investments

**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 events production?**

By far, members have been investing in LED lighting, screen displays and/or graphic walls and half or more have also added or upgraded their studio space for A/V, digital content, virtual event for content production and telecommunications capacity/connections for live broadcast.

	All %	Europe	North America	Asia	Australia/ New Zealand
LED lighting, screen displays and/or graphic walls	70%	75%	25%	100%	50%
Studio space for A/V, digital content, virtual event, etc. for content production	52%	44%	0%	100%	25%
Telecommunications capacity/connections for live broadcast	48%	38%	25%	86%	50%
Partnered with new or different AV or digital content partners	48%	38%	25%	86%	25%
New staff hires	45%	50%	50%	29%	50%
Video cameras	42%	38%	25%	57%	50%
On-site support by professional technicians	39%	38%	75%	29%	25%
Ballroom and meeting room or other space AV enhancements	36%	31%	25%	57%	25%
Video and sound editing equipment and software	33%	31%	25%	43%	25%
Other specialty studio lighting systems	12%	6%	25%	29%	0%
Other	6%	5%	25%	0%	0%

## Hybrid Event Models

**Survey Question: Overall, how well have hybrid event models (with a mix of in-person and online elements) been working for your largest, most important clients?**

The response to this question is mixed. While a total of 30% say the hybrid event models they have instituted or seen used by clients have been excellent or very good, just under one-third indicate this has been good compared to 28% that selected the term fair to describe these events with a mix of digital and in-person elements.

	All %	Europe	North America	Asia	Australia/ New Zealand
Excellent	11%	15%	0%	14%	0%
Very good	19%	20%	0%	14%	34%
Good	31%	25%	50%	43%	33%
Fair	28%	25%	25%	29%	33%
Poor	6%	20%	0%	0%	0%
Unsure/Not applicable	6%	5%	25%	0%	0%

## Industry Net Zero Carbon Emission Pledge Status

**Survey Question: At COP26 in Glasgow, the event industry pledged to achieve net zero carbon emissions by 2050. At what stage is your centre in terms of setting plans and defining a roadmap to achieve that goal?**

The largest segment of members (43%) indicated that their organization has started discussions but plans and a roadmap still need to be finalized and approved. Fourteen percent say their net zero carbon emissions plans and roadmap process is underway.

	All %	Europe	North America	Asia	Australia/ New Zealand
No planning process is set at this time	9%	5%	34%	14%	0%
Still preparing to start discussions and the planning process	29%	26%	0%	57%	25%
Discussions have started, but plans and roadmap still need to be finalized and approved	43%	47%	33%	29%	25%
Our plans/roadmap are finalized and approved, with implementation to start	6%	0%	0%	0%	50%
Our net zero carbon emissions plans and roadmap process is in implementation	14%	21%	33%	0%	0%



## V. Staff Recruitment, Training and Retention

Labor markets are tight in many parts of the world, and this is impacting many AIPC members.

### How Challenging are Labor Markets

#### Survey Question: How challenging is recruiting and retaining suitable employees?

Sixty percent of members say recruiting and retaining suitable employees is extremely/very challenging. Labor markets are tight in many parts of the world and member centres are being impacted.

	All %	Europe	North America	Asia	Australia/ New Zealand
Extremely challenging	30%	25%	50%	14%	75%
Very challenging	30%	30%	50%	29%	25%
Challenging	19%	25%	0%	14%	0%
Somewhat challenging	14%	10%	0%	29%	0%
Not at all challenging, not an issue	8%	10%	0%	14%	0%

### Challenged Labor Markets by Role/Skill Levels

#### Survey Question: Are you finding it more difficult to find job candidates with the skills you need at various staffing levels?

Finding mid-level management staff is considered the toughest right now by members.

	All %	Europe	North America	Asia	Australia/ New Zealand
Yes, at the senior management and executive level	8%	5%	0%	14%	0%
Yes, at the mid-level management level	49%	55%	50%	29%	50%
Yes, at the entry or part-time level	32%	25%	50%	43%	50%
No	11%	15%	0%	14%	0%

## Initiatives to Improve Staff Recruitment, Training and Retention

**Survey Question: Have you undertaken any new initiatives or implemented new systems to enhance or streamline talent recruitment, training or retention? If so, what are they?**

Over half of members have undertaken a new initiative to enhance or streamline talent recruitment, training or retention. Some of the responses based on member feedback include using technology to improve the recruitment and on-boarding process, increasing salary, benefits and schedule flexibility, adding referral programs, enhancing training, and using social media more to promote job opportunities.

	All %	Europe	North America	Asia	Australia/ New Zealand
Yes	56%	45%	50%	86%	100%
No	44%	55%	50%	14%	0%

### Verbatim responses:

- “Automatic employment opportunities for new applicants who have come from other venues within our group.”
- “Brought recruitment in-house and automated recruitment for front line positions.”
- “Communication on social networks.”
- “Digital platform.”
- “Employed a talent acquisition manager.”
- “Employee referral program and incentives, retention strategies.”
- “Focus on chefs and in recruiting refugees from Ukraine.”
- “Information sessions at universities, surveys about internal transfers, changes to performance reviews, new training.”
- “Initiatives to attract new talents and promoting our company like a great place to work.”
- “Looking at new ways to communicate to candidates, new recruit training and incentives.”
- “New employee adaptation program.”
- “Packages for casual staff.”

- “Professional streamline teams were hired as contractors to provide services to clients.”
- “Reviewing salary levels.”
- “To drive casual recruitment - refer a friend incentive, work X amount of shifts during time period gives Y bonus.”
- “Training portal.”
- “We have restructured our HR department to have a focus on recruitment and training.”

# Conclusion

## Member Comments on the Post-Pandemic Industry Outlook

### 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 time, and the emerging recovery/rebound 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 written responses are provided followed by select member comments.

### How the Recovery and Rebound Period Will Impact the Future of the Industry

**Survey Question: How do you think this challenging time, and the emerging recovery/rebound period, will impact the future of the convention centre and events and meeting industry?**

#### Key themes in the write-in responses:

- Some members expect a full rebound back to “normal” while others are more skeptical
- Staffing issues at centres and vendors are expected to continue
- There are still important questions around the pace of the attendance recovery
- Technologies adopted during the past few years are expected to remain important
- An on-going need to adapt venue design and service offerings to new event concepts
- Continuous search for new revenue streams and business models

#### Select comments:

- “At least in the interim, staffing levels will affect the volume of business we can take on.”
- “Centers could face big challenges from the transformation of new event (formats).”
- “Difficult to say. It is more how the new ways of working (e.g., home office) will impact the meeting industry.”

- “Due to the nature of shutdown and indoor mass gathering being difficult, many staff have left the industry and found new industries unlikely to return. Staff will be the biggest challenge in the next couple of years.”
- “Human beings are social beings, and it is our belief that face-to-face meetings will thrive. The pandemic taught us the importance of technology and meeting differently. These insights help to enhance the operation of centres in many ways that we would have not emphasized if not for the pandemic.”
- “I think many have realized the value in face-to-face meetings and that meetings will come back in full force in the future.”
- “International association conferences will decline while local events will gradually increase.”
- “It has made organizers and attendees realize that live meetings have the best business-to-business success potential.”
- “Meeting levels will return fully to pre-pandemic levels, but participants will be more selective about which type of events they will attend. Content will remain critical, and serendipity is key.”
- “More risk consciousness.”
- “Promote the employee experience. New kind of events will be able to replace lost business.”
- “Reduction in attendees from other parts of the world.”
- “Revenue is going to be impacted long term. Business models need to be reinvented.”
- “Staffing shortages as people leave the industry; continued prevalence of hybrid meetings even as in-person attendance rates rise; return of parties/coffee breaks and rise in F&B revenue.”
- “The event industry will bounce back as it is evident that people need to meet face-to-face. Convention centers will need to stay ahead of technology trends.”
- “The industry is resilient, and recovery looks possible by late 2024 if no further major Covid issues.”
- “Unsurprisingly, there will be a huge emphasis on event health and safety into 2022 and beyond. Personalization will become a prime driver of event and marketing success. No longer able to rely on physical spaces and face-to-face interaction, future-proof brands need to focus on creating highly personalized events and forging personal connections with attendees that go far beyond what happens on event day. Emerging technology, including augmented reality and AI, will continue to offer more opportunities for connection and interaction between guests from all over the world. Sustainability and corporate responsibility will also continue to take centre stage, with more than half of the world’s CEOs intentionally emphasizing efforts toward tackling environmental and social issues in 2022.”
- “We hope events will resume normal when the pandemic situation is stabilized, it seems that events in Europe are experiencing a rebound.”

- “We need to renew our offer constantly.”
- “We will need to provide wider spaces, new approaches to event safety and state of the art technology. Sustainability will be a key issue.”
- “Will boost innovation and creative solutions, hybrid models and multifunctionality.”

## Member Comments: 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 member write-in responses include:

- Best practices, benchmarks and trends
- Understand client needs and how they are changing
- Staff recruitment and retention strategies and tactics
- New revenue and business models
- Facility design and functionality innovations, changes and trends

### Select comments:

- “Benchmarks and trends are very important for us.”
- “Best practices of new services and technology.”
- “Best practices, new insights learnt or unlearnt that are helpful, and recovery traction/trends in various regions.”
- “Client focus groups to understand how we can be a better partner.”
- “Continue professional development and training opportunities to attract talent to the industry.”
- “Cost of living changes, research how event staff view their positions post-pandemic.”
- “Customer behavior, governments’ new economic plans and its impact on the industry.”
- “Delegate attendance figures across all global regions, splitting convention and exhibition business to see which areas are recovering best/quickest.”
- “Growing new types of events in other types of venues that might become part of centres’ business soon.”

- “How to motivate reception, technical, bar, location staff.”
- “Industry trends (at least twice a year). We need to be updated.”
- “Information on percentage of events with dining/parties and how they are held; different coronavirus guidelines adopted by facilities; cancel policies by country with respect to cancellation by outside forces (COVID-19, war, etc.); sustainability initiatives; contracts in the time of COVID-19, especially whether COVID-19 is considered to be force majeure or not.”
- “Innovative recovery and revenue generating ideas. Business stats for the last year.”
- “Meeting spaces of the future. Have they/will they change to reflect the pandemic and any future international health threats which may occur.”
- “New business models for revenue. Sharing good examples for ESG.”
- “Post-pandemic government incentives.”
- “Pricing models. Innovations and best practices.”
- “Proof of the ongoing success of the live meetings sector.”
- “Resources and tools to support the measurement of the positive impact of business events, globally and locally, socially and economically. This will help drive advocacy at local and international levels.”
- “Response sharing from clients.”
- “Technology trends in the event industry. New revenue streams for convention centers to ensure future financial sustainability and environmental trends.”



International Association of Convention Centers  
Email: [secretariat@aipc.org](mailto:secretariat@aipc.org)  
[www.aipc.org](http://www.aipc.org)

© 2022 Copyright AIPC and Access Intelligence, LLC. All rights reserved. Reproduction in whole or in part without written permission of the authors is prohibited.