



Insights  
Benchmarks  
Analysis

# 2025 Member Survey

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# Introduction

This report provides the findings and insights from the 2025 edition of the annual AIPC Member Survey Report. This on-going analysis identifies and tracks multi-year trends impacting the convention centre industry around the world. The report focuses on the following areas:



**Attendance and bookings growth estimates**



**New business strategies, revenue streams, & innovations**



**How clients are changing and how centres are responding**



**Marketing strategies**



**Venue infrastructure and technology investments**



**Sustainability trends**



**Staff recruitment, training, and retention strategies**



**Members' industry outlook with a focus on challenges and opportunities**

The study has been conducted by AIPC in collaboration with Michael Hughes, Managing Director of Research & Consulting with Access Intelligence. AIPC conducted the survey of members around the world in the first half of 2025. The survey received responses from 73 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 in each of the major regions of the world.

AIPC and Access Intelligence thank all of the members that responded for their important contributions to this study.



# Executive Summary

After a number of years of strong industry growth, the 2025 AIPC Member Survey presents some mixed results. Overall, the survey findings are much more positive than negative, and member confidence about the industry outlook is good. But still high inflation rates and economic uncertainty in many regions of the world are impacting the convention, events, and meetings industry. Also, event producer clients continue to want more service for lower fees, and the issue of last-minute client event design and programming changes is not going away.

An example of this mixed message is that for 2024 the worldwide average attendance growth estimate was a healthy 9% increase over 2023, but total event and group bookings were flat over the same period. Yet, there is positive outlook for 2025 with members worldwide expecting over 6% attendance growth, on average, and a 4% total event bookings increase. Overall, the industry has returned to “normal” where overall economic trends and competition among destinations is impacting market dynamics and growth.

Uncertainty about the economic outlook is a key theme throughout the global economy as well as in this report. A member explained what they see as the key issues: “One of our biggest challenges today is the uncertainty of the business, as traditional patterns no longer apply, leading to a decreased level of predictability in bookings and client behavior.”

Other centre management challenges include increasing competition, high costs for utilities, energy, technology services, and labor, often tight hotel capacity in their destination, and the near constant need for facility upgrade investments. Still, it’s an understatement to say that the industry has been through more challenging periods. Times of uncertainty make industry-leading in-person events even more important. A member said their biggest opportunities are “optimizing relationships within the industry and leveraging strategic partnerships.” And another noted they see their biggest opportunities around “signing up more long-term multi-year deals, relationship management with key stakeholders and clients, partnerships, and maintaining close relationship with the CVB.”

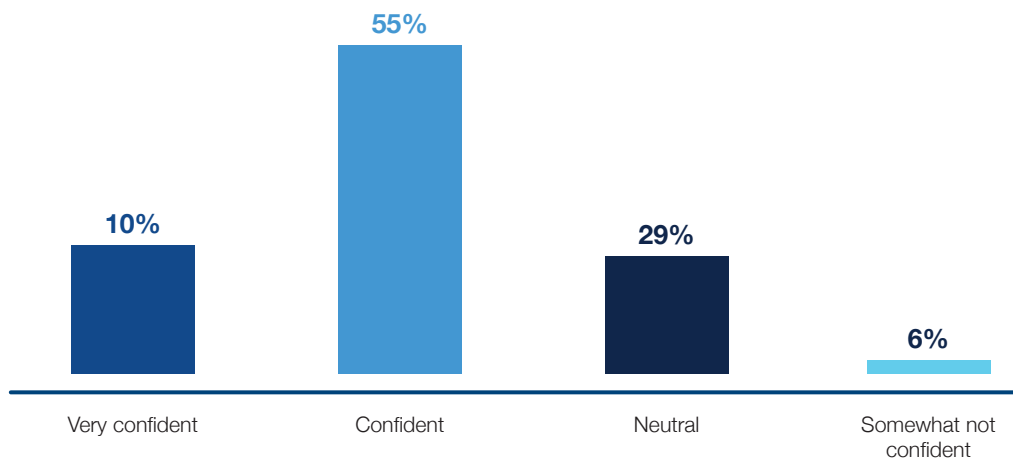
This period is marked by many uncertainties, but the convention centre industry will serve many of the important events and groups around the world that will work through these challenges.

Some of the key insights from the member survey are provided in this Executive Summary.

**INSIGHT #1**

Sixty-five percent of members are very confident or confident the event industry will grow over the next few years

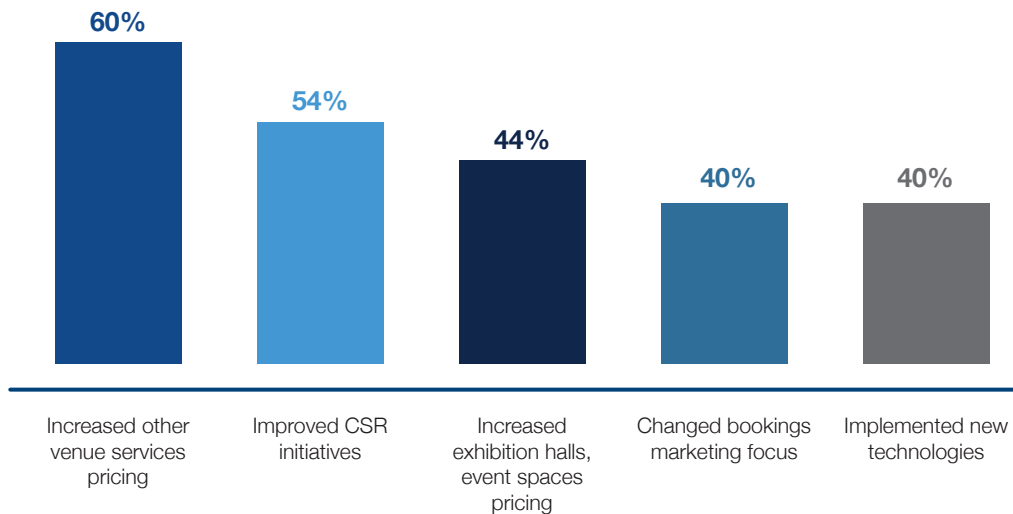
This is essentially the key industry outlook question, and 65% of members are either very confident or confident. With the uncertain economic outlook in many regions 29% of members noted their industry outlook for the next few years is neutral.

**Confidence Level Events and Meetings Industry Will Grow Over Next Three to Five Years**

**INSIGHT #2**

The primary centre business model changes have been to increase venue services pricing and CSR initiatives

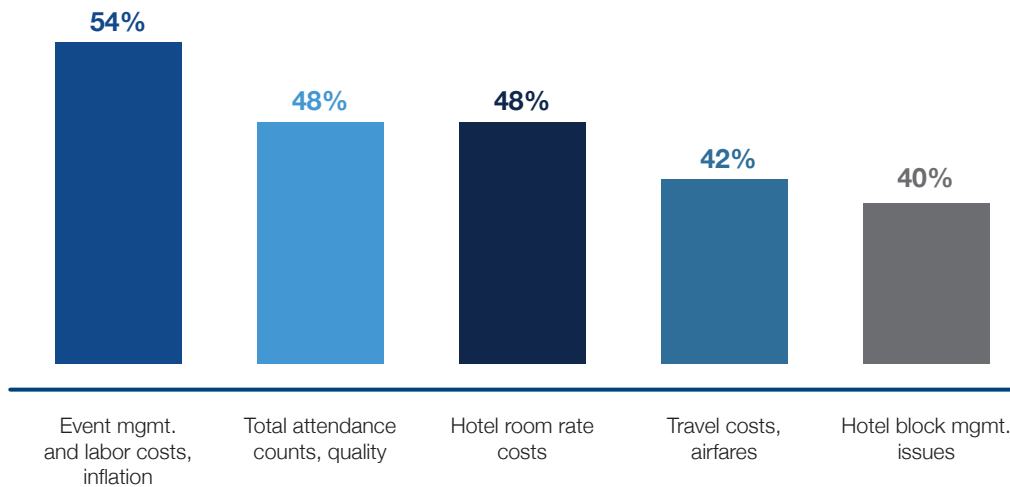
The main areas that have undergone strategic reviews and changes have been around pricing, CSR, target marketing, and technology investments. These and event operations, client service, staff management, along with government and partner relations are often the core centre management tasks and focus areas.

**Top Five New Strategies, Business Models or Pricing Changes**

**INSIGHT #3**

The top issues impacting key event clients are inflation, attendance size and quality, and hotel room rates

Many issues are impacting top event and group clients which are usually national or international conventions, exhibitions, conferences, or corporate meetings. Event producers are concerned about inflation, attendance size and quality, and high hotel room rates.

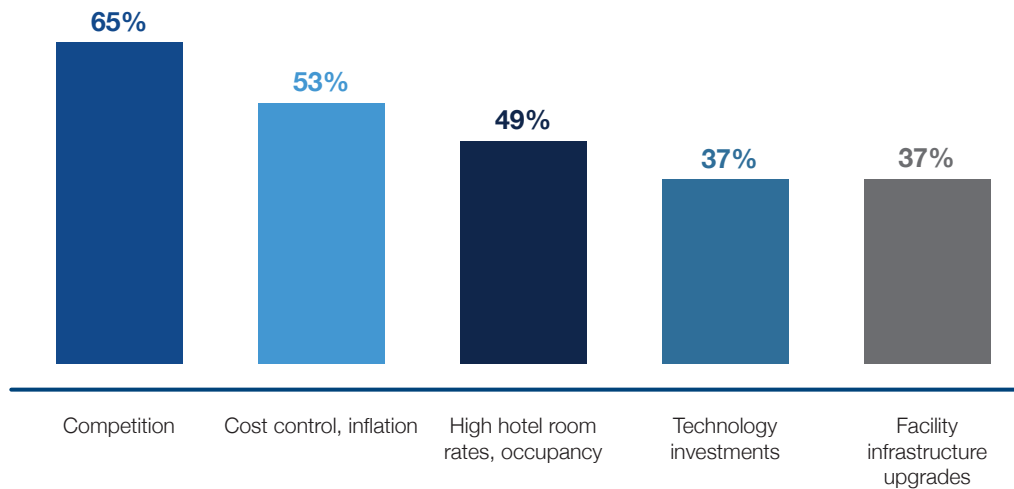
**Top Five Issues Impacting Centres' Most Important Clients**

## INSIGHT #4

### Biggest marketing challenges

The convention centre industry is very competitive. Some centres have multiple competitive sets that include local, regional, national, and international venues and destinations. And competition is the top sales and marketing challenge. Cost increases and high hotel occupancy are also major issues for many centres and their destination partners. Tight hotel capacity is a particularly challenging issue in North America.

#### Top Five Centre Marketing Challenges



“

*“(Our challenge is) growing business levels against increased competition as well as cost control and efficiencies.” – AIPC Member*

**INSIGHT #5**

Artificial Intelligence usage is still in the early stages; only 40% of members are using AI in a meaningful way as part of centre management or operations.

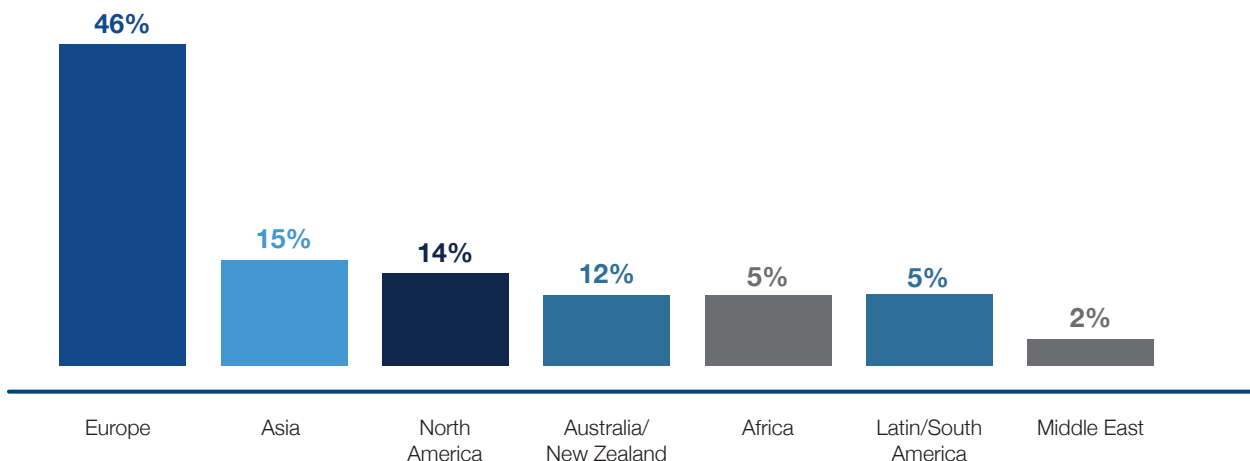
The survey question was: Have you integrated any of the following AI-based solutions into your centre management processes? Forty percent of members say they are using AI in a meaningful way. The primary usage is for chatbots and virtual assistants as part of customer relationship management.

### AI Usage in Centre Management Processes

	Worldwide
AI tools for customer relationship management (chatbots, virtual assistants)	18%
Marketing campaign automation and audience segmentation	12%
Facial recognition or biometrics for access and security	12%
Predictive analysis for booking and pricing optimization	2%
None	60%
Other	10%

### Member Survey Response by Region

The largest segment of survey respondents are European members (46%), followed by Asian (15%) and North American members (14%).



*The findings in this summary provide a portion of the insights from the study. The rest of the report provides the full research data and analysis.*

# I. Industry Performance and Outlook

This first section provides estimated attendance and gross revenue growth in 2024 with an outlook for 2025. Risks to growth are also included. After a very strong rebound and growth period between 2022 and 2024, most management teams remain confident about the industry outlook.

## Average 2024 Total Attendance Growth 2024 Over 2023

*Survey Question: By what percentage did your facility's total number of event attendees and delegates in 2024 change compared to 2023?*

On average, members worldwide say that total attendance increased by over 9% in 2024. It's important to note that these are averages of estimates and should be used to understand the general direction the industry has been heading.

Worldwide	Europe	N. Amer.	Asia	Aus./NZ
9.2%	11.2%	4.0%	10.3%	8.9%

## Forecasted 2025 Attendance Growth Compared to 2024

*Survey Question: What is your forecast for 2025 for total attendance level growth compared to 2024 on a percentage growth basis?*

The collective total attendance growth expected, on average, for 2025 is 6.7%.

Worldwide	Europe	N. Amer.	Asia	Aus./NZ
6.7%	6.7%	3.4%	4.5%	4.3%

## Average 2024 Total Event and Group Bookings Growth 2024 Over 2023

*Survey Question: By what percentage did your facility's total number of event and group bookings in 2024 change compared to 2023?*

Total bookings were flat last year. This suggests that after a strong industry recovery and rebound period between in late 2021 to 2024 the industry stabilized somewhat in terms of total number of events, meetings, and gatherings over the past year or so.

Worldwide	Europe	N. Amer.	Asia	Aus./NZ
-0.2%	-1.5%	-0.4%	0.9%	7.7%

## Forecasted 2025 Total Event and Group Bookings Growth Compared to 2024

*Survey Question: What is your forecast for 2025 for total event and group bookings growth compared to 2024 on a percentage growth basis?*

Total bookings collectively are expected to increase by a moderate but still healthy 4% in 2025.

Worldwide	Europe	N. Amer.	Asia	Aus./NZ
4.0%	4.5%	1.7%	6.9%	1.3%

## Strength of Regional Economic Activity and Business Growth

*Survey Question: How do you characterize the overall current strength of economic activity and business growth in your region?*

The bulk of the membership (56%) say overall economic activity in their region is moderate, and a total of 29% say it's weak/very weak/flat.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Strong growth/activity	15%	10%	13%	17%	13%
Moderate	56%	55%	63%	50%	75%
Weak	20%	23%	13%	33%	13%
Very weak, flat to no growth	9%	13%	13%	0%	0%

## Confidence Level Events and Meetings Industry Will Grow Over Next Three to Five Years

*Survey Question: How confident are you about the overall events and meetings industry health and growth prospects over the next three to five years, i.e., what's your outlook for the industry?*

Even with economic uncertainty, a large majority of members are confident or very confident about the event and meetings industry outlook. An overall assessment of the industry is that after a very strong rebound and growth period between 2022 and 2024, most management teams are still confident about the industry, but there is a sense that growth is stabilizing and slowing, i.e., that the industry is stabilizing and normalizing.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Very confident	10%	10%	13%	17%	25%
Confident	55%	63%	25%	50%	50%
Neutral	29%	20%	50%	33%	25%
Somewhat not confident	6%	7%	13%	0%	0%

## Risks to Centre Business Growth

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

Key themes noted in a number areas of this survey report, as well as AIPC surveys over the past number of years, are front and center here. The top risks to centre business growth are continued cost increases, economic uncertainty, and hotel capacity and pricing issues. Many members are also understandably concerned about international conflicts and to a lesser extent, air travel issues.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Increased costs/inflation for venue management and operational services and equipment	68%	61%	75%	93%	50%
Overall economic strength/weakness	59%	64%	38%	83%	38%
Hotel availability and pricing	48%	39%	100%	17%	28%
International conflict	43%	43%	50%	33%	13%
Growing competition from other centres / regions	41%	29%	38%	83%	50%
Air travel issues (pricing, availability, airlift, route access, etc.)	38%	29%	50%	17%	50%
Increased costs specifically for technology-related investments (either internal or client/user-facing)	32%	29%	25%	50%	13%
Subvention and government funding to secure events	32%	14%	38%	67%	50%
Changing government priorities	21%	4%	63%	33%	38%
Sustainability, environmental concerns	20%	21%	0%	17%	38%
Government / corporate restrictions on meetings	18%	7%	50%	17%	25%
Immigration or visa requirements limiting access	18%	4%	38%	17%	13%
Reduced event and marketing spends/reduced operating days or footprint	18%	21%	0%	33%	13%
Low demand from traditional event clients and groups	16%	11%	13%	33%	13%
Low attendance especially from non-local attendees	14%	11%	38%	33%	0%
Legal issues with clients, major disagreements and/or negotiations	9%	11%	0%	0%	0%
Smaller sized local events	9%	11%	0%	17%	13%
Event and group re-booking, re-scheduling challenges	7%	4%	0%	17%	13%
Increases of corporations and individuals using digital media and communications	5%	7%	0%	17%	0%
Replacement of events with online alternatives	2%	0%	0%	17%	0%
Reputational issues	2%	0%	0%	0%	0%
Other	13%	7%	38%	0%	25%

“

*“The biggest challenge we’re facing is the need to adapt to customer expectations even more quickly than in previous years. This includes the emergence of AI and its integration into in-person conferences. The importance of personalization and the value of the customer experience. Regarding profitability and market competitors, differentiation as the key to standing out in a saturated market where we must defend the center’s rates against online competition and alternative venues.” – AIPC Member*

## II. New Business Strategies, Revenue Streams and Innovations

A number of important business management areas are covered in this section. It starts with an overview of changes to business strategies and pricing, which is followed by how members measure management success. The important areas of inflation, new revenue streams, and innovations are also included.

### New Strategies, Business Models or Pricing Changes

*Survey Question: Over the past year, have you instituted any of the following important new or different business strategies, models or pricing changes, or partnerships?*

The key management focus areas in terms of strategy reviews and changes have been around pricing, CSR, target marketing, and technology investments. These and event operations, client service, staff management, and government and partner relations are often the core centre management requirements.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Increased other venue services pricing	60%	54%	71%	67%	29%
Improved Corporate Social Responsibility (CSR) initiatives	54%	54%	29%	67%	71%
Increased our pricing for exhibition halls and major event spaces	44%	38%	71%	67%	29%
Changed our bookings and marketing focus, orientation to certain types of events or groups	40%	42%	29%	33%	57%
Implemented new technologies	40%	31%	43%	83%	57%
Other important partnership(s)	23%	35%	0%	17%	0%
Partnered with event producers to launch or co-own events, or cost/profit/risk share	17%	19%	14%	17%	0%
Started to offer important new services or lines of business	17%	27%	0%	17%	14%
Changed venue name, logo or branding	15%	12%	14%	17%	14%
Changed the way we calculate pricing for exhibition halls and major event spaces (e.g., changed from per day to per event, or gross space vs. net, etc.)	13%	15%	14%	0%	14%
Changed formal relationship with CVB/DMO/city-regional destination marketing partner	13%	15%	0%	0%	29%
Changed critical services provider partner(s) such as F&B or telecommunications	6%	4%	14%	17%	0%
Other	13%	15%	0%	17%	0%

## Overall Success Measurement

*Survey Question: How do you and your senior management team measure overall success?*

Convention centre management teams are judged on a number of metrics and performance areas. Besides gross revenue and profitability, the top metrics are often number of visitors, number of event bookings, and economic impact.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Venue gross revenue	90%	96%	100%	100%	57%
Venue operational profit/loss	85%	84%	100%	67%	71%
Total number of visitors	67%	68%	75%	50%	57%
Total number of events	65%	60%	75%	83%	43%
Total economic impact	63%	48%	100%	33%	85%
Energy efficiency and sustainability	50%	40%	50%	83%	29%
Impact on economic development in our city and region	48%	40%	63%	33%	57%
Public relations, press coverage	38%	24%	75%	67%	29%
City and community service levels and impact	17%	8%	50%	33%	0%
Total number of hotel rooms booked	13%	4%	50%	0%	14%
Limitation or reduction of operational revenue losses or payment from government owner entity	12%	8%	38%	0%	0%
Visitor-related tax revenues	10%	4%	38%	0%	0%
Hotel community occupancy levels	6%	4%	25%	0%	0%
Performance of our proprietary event business	6%	8%	0%	0%	0%
Hotel community gross sales or profit	4%	0%	25%	0%	0%

## Inflation

*Survey Question: Have any of your core venue management budget areas or event services related costs increased considerably by 5% to 15% or more over the past 12 months?*

Inflation is still a key issue for many convention centres and their clients around the world. This is a specialized, labor-intensive industry and many prices and costs of goods and services continue to rise.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	69%	67%	63%	83%	86%
No	31%	33%	37%	17%	14%

Members' often mentioned cost areas include:

- Energy and utilities
- Maintenance
- F&B
- Labor
- Security
- Outsourced service contacts
- Technology and communications

## New Revenue Sources

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

One-quarter of the membership added an important new revenue source in the past year. This is a somewhat low percentage compared to recent years.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	25%	32%	13%	50%	0%
No	75%	68%	87%	50%	100%

## Multi-Year Trends: Centres that Added a New Revenue Stream 2015 to 2025

Year	Worldwide
2025	25%
2024	32%
2023	41%
2022	43%
2021	60%
2019	35%
2018	23%
2017	33%
2016	40%
2015	39%

## Innovations Added in the Past Year

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

Just under half of members say they added a new innovation or important management system or process in the last year.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	48%	48%	25%	50%	71%
No	52%	52%	75%	50%	29%

Often mentioned innovations and new ideas include:

- Overall building management systems
- Specific building services access control and management technology, apps, etc.
- Sales and marketing software
- Cyber security
- Management team and/or staffing recognition
- Digital signage and communication
- AV hardware, software and services
- Sustainability plans
- AI software and tools
- New F&B areas and/or retail spaces

## Multi-Year Trends: Percentage of Members with New Innovations 2021 to 2025

Year	Worldwide
2025	48%
2024	39%
2023	49%
2022	70%
2021	60%

## Pricing Changes

*Survey Question: Have you recently changed your pricing approach to optimize center occupancy?*

Many centres have been reviewing their pricing strategies and over half have recently made important pricing structure changes or adjustments. One-third of members have adjusted their off-peak period pricing, 29% have added more package offerings, and 25% have introduced dynamic pricing.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, we have adopted dynamic pricing	25%	20%	43%	0%	29%
Yes, we have introduced pricing packages	29%	28%	29%	17%	43%
Yes, we have adjusted our prices according to off-peak periods	33%	20%	29%	33%	57%
No, we've kept our traditional pricing structure	45%	56%	57%	50%	14%

## III. Client Trends

This chapter starts with data on the strongest client and group sectors. It also includes findings on what members see as the biggest issues impacting their most important clients, and comments on how clients are changing.

### Event and Client Group Categories 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?*

Major corporate events are expected to be the strongest client segment over the next few years followed by association conferences and meetings.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
National or International corporate meetings	81%	88%	75%	33%	86%
Association conferences and meetings	71%	56%	88%	67%	100%
Association conventions with exhibits	69%	68%	75%	83%	43%
Entertainment events	42%	44%	25%	67%	43%
Exhibitions, trade shows and trade fairs	33%	28%	25%	50%	14%
Local corporate meetings	33%	26%	63%	33%	0%
Consumer and public shows	17%	4%	13%	0%	29%
Governmental events and meetings	15%	8%	0%	50%	14%
Sporting events	15%	8%	38%	17%	0%
Government priority industries	12%	8%	0%	50%	14%
Incentives	8%	12%	0%	17%	0%
Other	4%	0%	0%	17%	0%

### Type of Clients Break-Out: Local, Regional, National, or International

*Survey Question: How does your event, meeting and group client base break-out by client location origin i.e., Local, Regional, National or International?*

Worldwide one-quarter of clients are locally-based groups and 36% are national.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Local	25%	17%	23%	52%	25%
Regional	17%	18%	25%	9%	5%
National	36%	37%	38%	22%	54%
International	22%	28%	14%	17%	16%

## Top Issues Impacting Largest Event and Group Clients

*Survey Question: What are the most important issues impacting your largest, most important event and group clients?*

Many issues are impacting top event and group clients which are usually national or international conventions, exhibitions, conferences, or corporate meetings. Event producers are concerned about inflation, attendance size and quality, and high hotel room rates. These findings match with other research conducted by Access Intelligence and other industry organizations.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Overall event management and/labor costs, inflation	54%	46%	71%	50%	57%
Total attendance/delegate counts and quality	48%	33%	43%	67%	71%
Hotel room rate costs	48%	46%	100%	17%	14%
Travel costs, airfares or air travel issues	42%	17%	57%	50%	86%
Hotel block management issues	40%	42%	71%	17%	14%
Attendee late event registration and hotel booking trends	34%	17%	57%	33%	71%
Exhibitor/sponsor levels/demand	30%	25%	0%	50%	29%
Exhibitor/sponsor ROI	28%	25%	0%	67%	14%
Issues specific to their organizations	18%	38%	0%	0%	0%
Issues specific to their industries	14%	21%	14%	17%	0%
Attendee engagement levels	10%	17%	14%	0%	0%
Event management technology investment levels/requirements	10%	8%	0%	17%	0%
Other	4%	4%	14%	0%	0%

## How Event and Group Clients are Changing

*Survey Question: How have your most important event and group clients changed over the past few years?*

This is another important question that received write-in comments. The main themes in the responses include:

- Medical events have remained strong
- Later booking decisions by event producers and groups
- Last minute changes to event programs and element
- Cost sensitive and negotiating more
- Staffing changes at client organizations

Select member quotes:

“Attracting new and younger attendees.”

“Changes in experienced personnel. Still seeing changes in key event staff. Lack of experience means constant changes and education. Focus on costs and expecting venues to fix the issues in relation to their budget.”

“Cost sensitive, request for flexible solutions on short notice.”

“Demand for increased digital infrastructure and Wi-Fi/communications bandwidth and overall capacity.”

“Grown in size with a more diversified conference program.”

“Higher concern on sustainability.”

“Increase of large national corporate events, increase of international scientific congresses.”

“Increased ROI importance, increased requirement for quality of content, increase in interactive stands, and value of paid and free conference content, Requirement for higher NPS scores at events.”

“International events have been increased for the past few years.”

“Lack of experience, limited resources, rushed/last minute.”

“Last minute event requirement, last minute changes, delegates registration happens or increases nearer to event date.”

“Later registration date, more content-driven, and focus on value for their money.”

“Less exhibition square meters, diversification of revenues, investments in visitor experience.”

“Marketing strategies via social media platforms and practicing ESG principles in the execution of the events.”

“More and more price focused though they talk sustainability, service and availability as key drivers.”

“More contract negotiations, Increase in Government business, Increase in long-term deals. Demands and expectations have increased, some events have grown in size and length of event, and some clients have also become very budget conscious.”

“More cost sensitive, more service for the same price, less attendees, more changes in short term basis, need more support as they have more staff turnover or less educated staff.”

“More expectations, less budget.”

“More last minute in providing delegate and attendance numbers, more attuned to contract clauses, holding payment terms and adjusting them.”

“More social mixed use. Length of events are shortening.”

“More tech and fintech. More demand for sustainability.”

“Our event-design consulting services increase, and multi-year contracts are concluded.”

“Over the past few years, some of our most important event and group clients have increasingly confirmed their bookings at the last minute and frequently adjusted the number of delegates, both upwards and downwards.”

“Over the past few years, we’ve observed some clear shifts among our key event clients. For NGOs, especially in the academic sector, international conferences have been steadily recovering since the pandemic. This year and into next, we’ve seen a rise in both the number of bookings and the scale of these events. In the entertainment sector, short-term events, such as fan meetings lasting two days or less, are more inclined to choose our venue. However, longer events requiring three or more days often opt for venues with larger seating capacity.”

“Short termism. Clients are slow to commit as they are concerned about the uncertainty at moment.”

“Shorter booking timelines, more personalized & experiential events, sustainability awareness.”

“Shorter lead times to event, looking for more with less.”

“Some of our regular and good clients have events that have grown bigger, and we are no longer able to accommodate them.”

“The budget is increasingly important to them. They want quality for the same price than last year or more.”

“Type of client has not changed, but clients seem to be less organized and have many last-minute changes. “

“We have more international corporate events.”

## IV. Marketing Strategy

This section covers how centres are changing their sales and marketing strategies and approaches. The analysis starts with the biggest challenges members see impacting their clients, and how centres are changing their marketing strategies and tactics. It also covers the marketing channels with the best ROI, how relationships with DMOs-CVBs are changing, and hotel industry trends.

### Biggest Marketing Challenges

*Survey Question: What are your biggest venue management and/or destination marketing challenges and issues?*

It's an understatement to note that the convention centre industry is very competitive. Some centres have multiple competitive sets that include local, regional, national, and international venues and destinations. And competitive issues is the top sales and marketing challenge. Cost increases and high hotel occupancy are also major issues for many centres and their destination partners. Tight hotel capacity is a particularly challenging issue in North America.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Competition	65%	58%	38%	100%	71%
Cost controls, inflation	53%	38%	50%	83%	57%
High occupancy and/or high hotel room rates in destination	49%	58%	75%	17%	14%
Technology investment levels/requirements	37%	33%	13%	83%	14%
Facility or infrastructure upgrade/enhancement requirements	37%	21%	38%	83%	43%
Staffing, hiring and retention	35%	21%	50%	50%	43%
Lack of hotel capacity in destination	24%	17%	75%	0%	0%
Sustainability initiatives	24%	25%	0%	50%	14%
Managing or planning major capital investment programs or expansions, etc.	22%	13%	38%	33%	14%
Destination governmental or political issues	22%	13%	25%	33%	29%
Overall convention, event and/or group demand/business activity	20%	17%	25%	33%	14%
Lack of air lift in and around destination	20%	13%	25%	17%	29%
Safety and security issues inside and outside venues, hotels and/or downtown areas	20%	4%	25%	17%	43%
Availability of offsite/outdoor venues for large groups	20%	25%	13%	17%	14%
Relations with hotel partners	12%	17%	25%	0%	0%
Destination specific economic issues	10%	8%	0%	17%	14%
Relations with other event industry service providers and hospitality partners	4%	4%	0%	17%	0%
Other	2%	4%	0%	0%	0%

## How Marketing Strategies and Tactics are Changing

*Survey Question: How have you changed, or plan to change, your sales and marketing in response to evolving market conditions?*

Just over half of members say they have been pursuing other market segments to diversify their bookings mix, and many have also reviewed their pricing and service levels.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Pursuing other market segments, different types of events/groups	51%	58%	43%	80%	14%
Reviewed our pricing and service levels	45%	38%	29%	80%	57%
More marketing investment, increased marketing budget	43%	54%	29%	20%	14%
Invested in technology or other major enhancements	43%	42%	57%	40%	43%
Changed marketing approach or messaging	37%	42%	57%	20%	14%
Gathered more competitive information/intelligence	37%	25%	57%	60%	43%
Worked with agencies or outside marketing consultants	35%	38%	43%	20%	0%
Invested in new build, expansion or renovation	31%	33%	0%	60%	14%
Pursued local business alliances	27%	29%	14%	40%	29%
Worked closely with hotel partners	22%	25%	57%	20%	0%
Hired more sale and marketing staff	18%	25%	0%	20%	0%
Developed an “Ambassador” program	16%	17%	14%	0%	29%
Changed DMO-CVB relations	14%	21%	0%	20%	0%
Increased subvention and incentive activity	12%	4%	29%	20%	29%
Joined a marketing alliance	8%	8%	0%	40%	0%
No Change	2%	4%	0%	0%	0%
Other	2%	4%	0%	0%	0%

## Marketing Channels with the Best ROI

*Survey Question: Which marketing channel brings you the best return on investment (ROI) for lead generation and bookings?*

By far, and not surprisingly, the top marketing channel are event and meeting industry events. Strategic partnerships are also important.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Trade shows and events	70%	63%	71%	83%	71%
Strategic partnerships (agencies, etc.)	46%	42%	43%	50%	57%
Search engine optimization (SEO)	26%	29%	43%	17%	29%
Paid advertising (Google Ads, Meta Ads, etc.)	20%	13%	29%	17%	43%
Public relations and influencers	18%	21%	29%	17%	14%
E-mail marketing and marketing automation	12%	17%	14%	0%	0%
Other	12%	17%	0%	33%	0%

## DMO-CVB Relationship Changes

*Survey Question: Over the past year, have any of the following roles or tasks changed in terms of your centre's partnership and relationship with the DMO-CVB?*

Partnerships with DMOs-CVBs are critical. Overall, in the last year there have not been that many changes to these relationships. Australian/New Zealand and North American members have been the most active in terms of changing or updating their partnership agreements with their destination marketing partners.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Made important changes to partnership or working agreement/arrangement with DMO-CVB	20%	17%	17%	17%	43%
Changed types of events and groups targeted by the Centre	16%	13%	33%	17%	29%
Important staff changes related to DMO-CVB and Centre partnership or working agreement/arrangement	14%	8%	33%	17%	29%
Important changes to Centre marketing and messaging strategy implemented or assisted by DMO-CVB	14%	17%	0%	17%	29%
Changed the types of events and groups targeted by the DMO-CVB	8%	13%	17%	0%	0%
Decreased the booking window period controlled by the centre	6%	8%	0%	0%	0%
Increased the booking window period controlled by the centre	4%	0%	17%	17%	0%
No change	47%	50%	50%	33%	14%
Not applicable	6%	4%	17%	17%	0%
Other	4%	8%	0%	0%	0%

## Hotel Industry Trends

*Survey Question: Which of the following is happening or you are pursuing related to the hotel industry in your city?*

The majority of members around the world say centre and hotel communication and relationships are improving. Half or more indicated they have communicated the competitive issues related to event and group booking with hotel management or owners, and that hotel supply capacity has been increasing in their destinations.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Overall our relationships with the hotel community is improving	59%	64%	33%	80%	71%
We have communicated the competitive issues related to convention, exhibition and major event bookings	54%	45%	67%	40%	71%
Hotel supply capacity is increasing	50%	55%	33%	40%	57%
Overall hotel rates for event room blocks are increasing	43%	41%	33%	40%	57%
Worked with owners / managers / investors to make the case for the need for more hotel properties or rooms	33%	23%	67%	0%	43%
Asked for contributions or participation in incentive funds to help win event and group business	24%	23%	67%	0%	14%
Asked for hotel room rate decreases	24%	18%	33%	20%	14%
Asked for more information related to their pricing formulas and decisions	9%	9%	33%	0%	0%
Overall hotel rates for event room blocks are decreasing	9%	0%	33%	0%	29%
Hotel supply capacity is decreasing	7%	5%	33%	0%	0%
Other	7%	9%	0%	20%	0%

## V. Venue Infrastructure and Technology Investments

Survey results related to major investment projects and how centres are investing in technology are provided in this section. Security and safety related investments and how AI is being used by members are also included.

### Major Investments: New Builds, Expansions and Renovations

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

Overall, major capital investment projects are primarily renovation related. Forty-three percent of the members say they have no major capital investment or development plans or projects underway.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Renovation underway	22%	22%	25%	40%	0%
Renovation in planning stage	14%	13%	0%	0%	0%
Expansion in planning stage	12%	17%	13%	0%	0%
New build project in planning stage	10%	13%	0%	0%	0%
Expansion underway	10%	9%	0%	20%	0%
New build project underway	6%	0%	13%	0%	14%
Planned project/building investment has been postponed	4%	4%	0%	0%	14%
No development plans currently	43%	39%	50%	20%	71%

## Which Venue Areas Need the Most Enhancement or Investment

*Survey Question: Which spaces and areas in your venue need the most enhancement or investment?*

The top three areas and amenities that need the most investment are meeting rooms, technology infrastructure, and signage. But none of these were selected by more than 33% of the membership.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Meeting rooms	33%	18%	43%	40%	17%
Technology infrastructure or services	33%	32%	14%	60%	17%
Signage	33%	32%	43%		17%
Exhibit halls	24%	23%	14%	0%	50%
Outdoor, outside areas	20%	32%	14%	0%	0%
Theatres / Entertainment facilities	15%	18%	0%	20%	17%
Ballroom(s)	13%	5%	29%	20%	0%
Client-facing food service areas and restaurants	13%	14%	14%	20%	0%
Kitchen(s)	11%	5%	14%	40%	17%
Pre-function spaces	9%	5%	29%	20%	0%
Venue connections and links to transportation, such as shuttle bus and taxi areas	9%	14%	14%	0%	0%
Loading dock and related areas	7%	9%	14%	0%	0%
Other concession areas and store-fronts	4%	0%	29%	0%	0%
Venue connections and links to hotels or other key buildings	4%	9%	0%	0%	0%
Business centre	0%	0%	0%	0%	0%
Other	20%	23%	14%	20%	0%

## Average Venue Age

*Survey Question: What year did your centre first open?*

The average venue age is 31 years with the oldest venues in North America.

Worldwide	Europe	N. Amer.	Asia	Aus./NZ
1994; 31 years old	1994; 31 years old	1983; 42 years old	1998; 27 years old	2003; 22 years old

## Is Government More or Less Inclined to Invest in the Centre and Events/Meetings Industry?

*Survey Question: Do you feel that currently your government is more or less inclined to invest in the convention and congress centre industry, especially in terms of facilities and infrastructure than a few years ago?*

Thirty-eight percent of members around the world say their governments are more inclined to invest in the convention centre industry than a few years ago. The highest percentages are found in Australia/New Zealand and Asia.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
More inclined to invest	38%	29%	38%	40%	43%
Less inclined to invest	26%	19%	12%	60%	57%
No change	36%	52%	50%	0%	0%

## Technology Areas Seeing the Most Investment or Team Focus

*Survey Question: In which of the following technology-related areas are you investing the most or placing the most management or organization focus?*

Technology infrastructure and services investment is still a key focus of most centres, with an emphasis on network security, operations management technology, and telecommunications/internet capacity. Over 40% of members say they are investing in venue safety and security, digital signage, and sales and marketing technology.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
IT network security, cyber security	63%	52%	71%	80%	57%
Overall venue operations management and communications technology	60%	61%	57%	40%	71%
Telecommunications, internet capacity and services	54%	65%	43%	60%	43%
Venue safety and security	46%	30%	57%	80%	57%
Digital signage and communications systems	44%	30%	71%	40%	29%
Sales and marketing	44%	43%	43%	40%	57%
Audio-Visual	33%	39%	14%	20%	57%
Electrical, HVAC and/or lighting	31%	22%	57%	80%	14%
Waste management	31%	22%	29%	40%	43%
Human resources, staffing software and platforms, professional development, career progression, mental and well-being initiatives	21%	13%	29%	0%	57%
Food and beverage-related (such as online ordering, self-service, etc.)	19%	17%	14%	20%	14%
Event production services	17%	17%	29%	20%	0%
Video, streaming, broadcasting services or studios	0%	0%	0%	0%	0%
None/Not applicable	0%	0%	0%	0%	0%
Other	4%	4%	0%	0%	14%

## Security and Safety Investments

*Survey Question: Over the past year have you implemented any of the following related to security and safety?*

Security and safety has become a key issue and focus for most all centres with many initiatives and programs being implemented and enhanced. The top three areas receiving the most attention in the past year have been reviewing security and safety procedures and teams, staff training, and implementing new safety and security procedures.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Reviewed security and safety procedures and team	67%	42%	86%	80%	100%
Trained staff	67%	63%	86%	80%	57%
Implemented new safety and security procedures	47%	38%	57%	40%	71%
Enhanced safety and security technology	43%	29%	29%	20%	86%
Consulted with Government and safety officials	35%	17%	43%	40%	57%
Added safety and security equipment	27%	17%	43%	20%	43%
Discussed with or trained clients	20%	8%	57%	20%	29%
Hired security consultants	20%	13%	29%	0%	57%
No changes to date, but we plan to over next 12 months	4%	8%	0%	0%	0%
Other	6%	4%	29%	0%	0%

## AI Usage in Centre Management Process

*Survey Question: Have you integrated any of the following AI-based solutions into your centre management processes?*

AI usage by members is still in the early stages as only 40% say they are using AI in a meaningful way. The primary usage is for chatbots and virtual assistants as part of customer relationship management.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
AI tools for customer relationship management (chatbots, virtual assistants)	18%	13%	13%	40%	0%
Marketing campaign automation and audience segmentation	12%	17%	0%	0%	14%
Facial recognition or biometrics for access and security	12%	0%	0%	40%	14%
Predictive analysis for booking and pricing optimization	2%	0%	0%	0%	14%
None	60%	63%	75%	40%	86%
Other	10%	13%	25%	0%	0%

## VI. Sustainability

The critical issue of sustainability is analyzed in this section.

### Sustainability Measures and Actions

*Survey Question: What sustainable measures and actions have you put in place?*

Most centres are managing a number of sustainability initiatives and tasks. Over 70% of members say they have a sustainability strategy in place, have a specific waste reduction and sorting program underway, and a process for food waste reduction.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Sustainability strategy defined	76%	71%	86%	40%	100%
Waste reduction, sorting optimization	73%	67%	100%	40%	71%
Reduction of food waste	73%	63%	100%	40%	71%
ESG or CSRD report	61%	63%	43%	40%	57%
Sustainability department or dedicated person	59%	50%	71%	40%	57%
Measurement of team satisfaction/well-being (corporate culture questionnaire or equivalent)	57%	58%	71%	20%	57%
Sustainable labels obtained	45%	46%	43%	60%	0%
Carbon footprint reduction targets	43%	29%	57%	20%	57%
Green team	39%	38%	29%	60%	29%
Evaluation of suppliers and partners / Implementation of sustainable partnership criteria	39%	38%	29%	20%	57%
Personalized support for more sustainable events (or sustainable event guide)	39%	38%	71%	40%	14%
Carbon footprint	37%	33%	43%	40%	14%
Mobility plan	20%	17%	29%	0%	29%
Carbon footprint compensation	12%	13%	0%	20%	14%
Materiality matrix / double materiality	8%	17%	0%	0%	0%
Other	8%	8%	14%	0%	0%

## On-Site Renewable Energy Generation Investments

*Survey Question: Have you been investing in on-site renewable energy generation?*

A total of 60% of members have an on-site renewable energy generation program in place, and 18% say they will start one in the next one to two years.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, we've been doing this for years	33%	33%	38%	25%	29%
Yes, we recently started this	27%	38%	13%	25%	0%
No, but have plans to over the next 12 to 24 months	18%	13%	13%	0%	43%
No, and have no plans to do this at this time	18%	13%	25%	50%	29%
Unsure	4%	4%	13%	0%	0%

## VII. Staff Recruitment, Training and Retention

Recruiting and retaining staff is still a challenge for many members around the world. Covered here is analysis of new initiatives and procedures to enhance or streamline talent recruitment, training, and retention.

### How Challenging is Staff Recruitment and Retention

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

A majority of members say staffing issues are challenging or very/extremely challenging, which is a continuation of a long-term trend.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Extremely challenging, critical	6%	0%	0%	0%	29%
Very challenging	22%	29%	25%	0%	29%
Challenging	36%	29%	25%	80%	29%
Somewhat challenging	28%	25%	50%	20%	14%
Not at all challenging	8%	17%	0%	0%	0%

### 2024 to 2025 Comparison: How Challenging is Staff Recruitment and Retention

In the last year staffing issues look to have become slightly more manageable for centre teams worldwide. But it is still a major issues for many venues.

	2025 Worldwide	2024 Worldwide
Extremely challenging, critical	6%	10%
Very challenging	22%	35%
Challenging	36%	39%
Somewhat challenging	28%	12%
Not at all challenging	8%	4%

## Difficulty Finding Job Candidates at Various Staffing Levels

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

Worldwide, the findings show that mid-level positions are the hardest to fill and retain.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, at the senior management and executive level	25%	35%	25%	0%	29%
Yes, at the mid-level management level	58%	43%	63%	75%	71%
Yes, at the entry or part-time level	40%	39%	63%	25%	29%
No	13%	22%	0%	0%	14%

## New Initiatives or Approaches to Improve 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?*

Just over half of the membership has instituted a staffing-related initiative or program recently. A number of member comments explaining their new staffing strategies are below.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	51%	42%	43%	80%	71%
No	49%	58%	57%	20%	29%

Member comments on talent recruitment and retention initiatives:

“Attending MICE conferences, graduate school programs, leadership training, and cross-exposure with sister companies and alliance association members.”

“Cooptation by employees with finder’s fee.”

“Development program for young talents.”

“Employer brand initiatives.”

“Encourage greater internal transfers within our group.”

“Enhanced learning and development resources and requirements.”

“Established an allowance to support skill acquisition. Diversified recruitment activities, including prioritized mid-career recruitment and launching social media accounts for recruitment purposes.”

“Great Place to Work practices.”

“HR activities, grade system.”

“Internal job fairs to bulk recruit casual staff.”

“Interview process and role playing.”

“Job fairs, open doors (meet with us, discover the industry, explore career opportunities.”

“New on boarding software. New recruitment advertising campaign.”

“New overall strategy in the HR department: now people and culture.”

“Provide AI course training.”

“Recruiting campaign.”

“Retention and attraction, with focus on professional development with a focus on leadership, management, communication skills.”

“Strengthening training alternatives.”

“The use of an online recruitment portal linked to LinkedIn appointed. A specialized training and development manager working on a retention strategy and succession planning framework for the business. Enhancement and promotion of the Wellness Program in the workforce, and employee assistance program extended to family members for wholistic wellbeing.”

“Training.”

“Work with agencies.”

# VIII. Conclusion: Member Challenges and Opportunities

This Conclusion focuses on two open-ended survey questions: *What are the biggest challenges you and your teams are facing today?* And, *What are the biggest opportunities you see to increase your overall events business?* Key themes in the dozens of written responses are provided for each question followed by select member comments.

## Biggest Challenges Facing Centre Management Teams Today

*Survey Question: What are the biggest challenges you and your teams are facing today?*

Key themes in the write-in responses:

- Cost control, inflation
- Client demands and late change requests
- Political and economic uncertainty
- Staff recruitment and retention
- Keeping on top of changing technology

Select comments:

“Balancing supply and demand, shorter lead times, shorted booking times.”

“Big growth and new projects but short in human resources, limited by general public budget limitations.”

“Cancellations of large, confirmed events due to internal reasons of the companies or due to international politics situation.”

“Change management and limited space in peak season.”

“Changing trends, managing change internally and getting team members to adapt to current trends, change way of doing things, etc.”

“Competition, decreasing budgets, new leads generation.”

“Cost containment. Consistency in service delivery.”

“Cost control connected with inflation, new team has to learn new processes.”

“Doing more with less with reduced budget and staff.”

“Externally: Economic uncertainty, reluctance of clients to commit until last minute; pricing pressure; expect more for less. Internally: fatigue with change, complacency.”

“Geopolitical issues and high inflation results in very high prices.”

“Global security concerns and restrictions on movement of goods and people.”

“Global uncertainty and the related impact on decisions for clients on permission to book and delegates to travel and spend.”

“Growing business levels against increased competition as well as cost control and efficiencies.”

“Hotels availability and price.”

“Human resources and the stability of government support.”

“Increase and stabilization of event-related revenue. Impact of rising maintenance and repairing cost on overall financial balances.”

“Increase in capacity utilization and cost management.”

“Inflation.”

“Intelligence on overbooking management. Find centers to manage in order to optimize business demand.”

“Internal processes and change management of the entire organization.”

“International development, continue to perform for next years, find other ways to develop more.”

“Keeping up with technology demands, customer’s demand for accurate advanced budgeting and cost savings.”

“One big challenge we’re facing is the rising cost of goods and services, which makes it more expensive for clients to hold events. That’s affecting their willingness to organize them. At the same time, we’re also seeing more competition, with other venues attracting some of our potential clients.”

“One of our biggest challenges today is the uncertainty of the business, as traditional patterns no longer apply, leading to a decreased level of predictability in bookings and client behavior.”

“Overbooking in the peak season.”

“Potential decrease in corporate demand due to heightened international uncertainty concerns.”

“Recruitment of trained staff and remote/regional location of conference centre.”

“Retention of staff and increased cost of business.”

“Securing a new type of client. Last-minute changes. Late signature of contracts. Late payments. Dependence on government funding.”

“Staffing and increasing sales efforts.”

“Technology integration.”

“The biggest challenge we’re facing is the need to adapt to customer expectations even more quickly than in previous years. This includes the emergence of AI and its integration into in-person conferences. The importance of personalization and the value of the customer experience. Profitability and market competitors: differentiation as the key to standing out in a saturated market where we must defend the center’s rates against online competition and alternative venues.”

“To keep a high activity when facing inflation and cost. To develop our business as the venue is quite new. To reduce the turnover difference between even and uneven years.

“Uncertainty of tariffs and hotel availability in our destination.”

“Uplifting the skills level of the workforce due to limitation on the educational levels. Staff retention in terms of critical skills in specific areas of the business. To create a healthy work life balance.”

“Winning business in current environment. Retaining highly skilled staff. International U.S. events might reduce due to political issues. Cost of airfares.”

## Biggest Opportunities Facing AIPC Member Teams

*Survey Question: What are the biggest opportunities you see to increase your overall events business?*

Key themes:

- Strong association and corporate events market in many regions of the world
- Client and group target marketing diversification
- Facility expansions, renovations, and investments
- City or regional transportation infrastructure investments
- Strategic partnerships
- Destination appeal

Select comments:

“A turnaround in the global economy and greater certainty would provide an opportunity to increase business.”

“Application of our value proposition.”

“Arena: sport events. More congress and big convention, expanding hotel industry so we will have more opportunity.”

“Association and corporate business.”

“Attract bigger association and corporate events.”

“Attract events that are no longer choosing destinations currently in conflict.”

“Completion of the new hall expansion.”

“Corporate events, tradeshow, diversifying the type of events we host.”

“Customers demand memorable experiences and that is an opportunity for us as a venue with an emblematic design, located in the heart of an attractive mid-sized city, well connected to other European cities, with hotels within walking distance and surrounded by beautiful natural spaces.”

“Destination perceived as safe and affordable.”

“Diversification of event types.”

“Expansion of the convention centre.”

“Focus on events that have been displaced from the U.S. due to the President’s actions to date.”

“Identifying new revenue streams and taking advantage of greater uncertainty that exists in other markets.”

“Improved destination marketing and recommendations.”

“Increased demand for our region.”

“Increasing operational efficiencies and value for clients with technology, AI and sustainability.”

“International association convention business.”

“Local strategy for being a science, knowledge and innovation city and territory.”

“Location of congress centre, safety of the country, region is perfect for incentives and leisure program.”

“More international events from corporation and association.”

“More than ever, event organizers are looking towards recognized leaders of the industry to host their events.”

“Negative U.S. political climate, makes our country a safer and diplomatic option.”

“New venue renovation projects and opportunities of diversification of revenues and increasing market share of corporate and entertainment.”

“One major opportunity is the growing demand for international trade fairs and conferences as global travel picks up again. By combining exhibitions with conferences, we can create new marketing opportunities and generate additional revenue streams.”

“One of the biggest opportunities to grow our events business lies in our flexibility and in the fact that we’re actively focused on multiple markets at the same time, allowing us to diversify our portfolio and not put all our eggs in one basket.”

“Opening of an onsite hotel in 2028. Recovery of domestic flights to city. Reduction of the travel time between our venue and the city centre in 2028 thanks to subway development. New fast train line between major cities in 2032.”

“Optimizing relationships within the industry and leveraging strategic partnerships.”

“Optimization of internal processes and mindset of employees.”

“Our new strategy and renewed venue with new brand and services.”

“Period of strong demand both for congresses and corporate conventions that is important to satisfy in order to retain,”

“Safe destination, and exchange rate is great for international conventions.”

“Shared value partnerships, enhancing success of clients events and business.”

“Signing up more long-term multi-year deals, relationship management with key stakeholders and clients, partnerships, and maintaining close relationship with the CVB.”

“Still fresh destination, more and more references still space for growth.”

“Technology and system improvement, and dynamic pricing.”

“The new investment on digital signage. Deepening the partnership strategy that allows us to provide all the services needed for an event.”

“Win business thanks to the new terrace and a fully renovated congress center and new hotel openings.”



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