

Some Recent Evolutions and Trends, Both Worldwide and in Europe, in the Events Industry, Before and After the COVID-19 Pandemic

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Abstract

In recent decades, the global events industry market has grown exponentially in terms of the number of organized events, the total number of participants and those involved in this sector, and its contribution to job creation and GDP formation has become increasingly significant.

Studies carried out before the COVID-19 pandemic have shown a series of trends in this sector, such as the reduction in the number of participants in international meetings of organizations.

The restrictions introduced during the pandemic period have led to other trends, such as the increase in the number of online or hybrid events. This trend is expected to continue, within limits, when the pandemic restrictions are lifted. However, it seems that many participants in the events continue to want to be present "in-person" whenever possible.

The analysis of these trends is of great importance to this industry's stakeholders.

Key words: the events industry, business events, evolution and trends, tourism events, international association meetings

J.E.L. classification: L83, Z31, Z32

1. Introduction

Gradually, events have become more and more common in our daily lives, becoming important marketing tools (Jugănaru, 2021, p. 543).

In recent decades, long-distance travel has become increasingly easy, and events held in various parts of the world have become larger and more inclusive, as participants no longer have to live nearby (Roberts *et al.*, 2022, p. 1147).

Getz defines "tourism events" as the events which are developed and marketed as a way of attracting tourists to destinations, so that they act as a "catalyst" for economic growth in the respective destination (Getz, 2012). Moreover, Getz considers that events are spatio-temporal phenomena, and each of them is unique, due to the interactions between "setting, people and management systems" (Getz, 2008, p. 404), whereas Fenich points out that the events industry touches virtually every aspect of hospitality (Fenich, 2019, p. 2).

The economic and social importance of the events industry has grown increasingly in recent decades, both in terms of its contribution to the global GDP, and in terms of the number of jobs created and retained worldwide.

Oxford Economics, in collaboration with a team of industry professionals and researchers within the Events Industry Council Research Committee, conducted an in-depth research on the global significance of business events (Events Industry Council, 2018).

The information contained in this research provides a clear base of credible statistical data, which allows the significance of this vast and diverse industry to be better understood.

The Events Industry Council is made up of over 30 event industry associations, representing over 103,500 individuals and 19,500 organizations involved in the organization of meetings, conventions, as well as events within the exhibition industry.

The results of the research show the performance of this sector of activity in terms of direct, indirect, and induced expenditure and in terms of employment, as well as the overall impact of business events on the wider economy.

This paper aims to identify the most significant evolutions and trends in the organization of international associations' meetings in recent years. This information can be particularly useful to both the organizations involved in organizing such events, and to the owners of the facilities/venues hosting these international meetings.

The definition and content of business events

Within this research, the term "business events" refers to bringing together 10 or more participants for a minimum duration of 4 hours at a contracted venue (Events Industry Council, 2018, p. 8).

Business events include conventions, congresses, conferences, trade shows and exhibitions, corporate business events, incentive events, as well as other business events that fit these criteria. Not included in business events are social activities (such as weddings or holiday parties, etc.), formal lifelong learning activities (at primary, secondary or university level), purely recreational activities (such as concerts or performances of any kind), political campaign rallies or the bringing together of consumers by a company for the purpose of introducing them to specific products or services (consumer shows, product launches to consumers) (Events Industry Council, 2018, p. 8).

The economic impact of business events

The *direct impact*, within the above-mentioned research, includes direct expenditure and the number of jobs directly involved in the planning and producing of business events. The *indirect impact* is the supplier industry impact, also known as the supply chain impact. For example, the facilities (venues) in which business events take place require inputs such as energy. Moreover, many of the venues hosting the events also hire other specialized suppliers who provide cleaning, equipment maintenance, accounting, financial, legal, marketing, etc. services, all of which are examples of indirect impact.

The *induced impact* occurs as the respective employees spend their earned money in the wider economy. For example, the hotel employees who spend their wages on rent, utility bills, transportation, food, etc. (Events Industry Council, 2018, p. 15).

In the year 2017, business events involved over 1.5 billion participants from over 180 countries, generating direct expenditure, i.e., spending on planning and producing the respective events, plus travel expenses for participants and exhibitors, amounting to more than USD 1.07 trillion.

Business events contributed 10.3 million direct jobs to the global economy in the year 2017, and they generated a direct contribution of USD 621.4 billion.

After calculating the indirect and induced impact, the authors of the research estimate the total global economic impact of business events in the year 2017 at USD 2.5 trillion of output (business sales), a number of 26 million jobs involved and a contribution to GDP creation of USD 1.5 trillion. Thus, the business events sector directly generated more output (business sales) than many of the major global economic sectors, including consumer electronics and computers and office equipment. The contribution of the business events sector to global GDP creation was higher than the economies of countries such as Australia, Spain, Mexico, Indonesia, and Saudi Arabia (Events Industry Council, 2018, p. 5).

Table no 1. Business events' summary data, 2017

Indicator Region	Direct spending (billion USD)	Participants (millions)	Average spending (USD)	Share of total	
				Direct spending	Participants
Global total	1,071.2	1,502.7	704	100,0%	100,0%
North America	381,0	329,7	1,156	35,6%	21,7%
Western Europe	325,0	444,4	731	30,3%	29,2%

Asia	271,4	482,7	562	25,3%	31,7%
Latin America & The Caribbean	33,0	91,2	362	3,1%	6,0%
Central and Eastern Europe	24,6	66,0	373	2,3%	4,3%
Africa	23,4	80,6	290	2,2%	5,3%
Middle East	12,8	26,1	488	1,2%	1,7%

Source: Events Industry Council, 2018, p. 9

Table No. 1 shows some significant data on business events in the year 2017, as reported by the Events Industry Council.

2. Literature review

In the tourism and hospitality journals, articles on the various segments of the events are ubiquitous (Dolasinski, 2021, p. 554). The acronym MICE is frequently used in the specialized literature to refer to events including Meetings, Incentives, Conferences and Exhibitions. The MICE Industry is a component of the Tourism and Hospitality Industry.

The World Tourism Organization (UNWTO) has identified the Meetings industry as an important and growing component of tourism and an important contributor to national economies; however, it needs to work with clear definitions and concepts, in order to highlight its contribution as fully and accurately as possible. To this end, UNWTO has identified two categories of measures needed on both the supply side and the demand side, and it has formulated a series of recommendations on Meeting Industry Data Collection (UNWTO, 2006, pp. x-xii).

Event industry research is considered part of a relatively new field of study within academic research, which is growing in popularity. Such research has only become a field of study in the last 50 years or so, since the 1970s, while research in this area only began to gain widespread momentum in the late 1990s. Much of this research has focused on event tourism, event impact, venue selection and event attendee motivations (Draper *et al.*, 2018).

Conferences and congresses aim to create a certain community of participants during each event. In Fenich's view, for example, the convention is an event in which the participants (attendees) main activity is the participation in meetings, discussions, socializing and attending other events organized on this occasion, such as exhibitions (Fenich, 2019).

Roberts *et al.* set out to generate a theory of events whose aim is to identify and explain human behavior when people engage in events. The authors consider that there are 5 key components of the theory, as identified in the specialized literature, namely: (1) Share purpose, (2) group setting, (3) logistics, (4) safety and security and (5) behaviors (Roberts *et al.*, 2022, p. 1155).

3. Research methodology

In this paper, in order to achieve the proposed aim of highlighting the trends in the evolution of the meetings organized by international associations, the desk research method has been used, based on which a secondary, quantitative, longitudinal database has been compiled (Jugănar, 1998).

The information used (consisting of representative indicators) was selected from publications of international bodies and organizations in the field, in particular the Events Industry Council, ICCA and UIA.

The processing of the statistical data and the interpretation of their evolution were the starting points for the formulation of conclusions and proposals for further analysis, in particular with a view to formulating future decisions on further investment in new Conference/Congress Centers for hosting such events.

4. Findings

Among the categories of events included in business events, we have chosen to highlight, in this paper, the meetings organized by international associations. In order to do this, we have analyzed reports, studies or other information published mainly by ICCA (The International Congress and Convention Association) and by UIA (Union of International Associations).

4.1. Trends in the evolution of the association meetings market before the COVID-19 pandemic

The international meetings market can be segmented according to numerous criteria, such as the size of the event, the type of delegates attending, the purpose of the event, the subject matter (theme) of the event and many others. Nevertheless, the main criterion is the initiator of the meeting, as this determines the type of event to be organized and what services could be offered. According to this criterion, the segmentation of the meetings market is done by defining the two main categories of events: Corporate Meetings and Non-Corporate Meetings (ICCA, 2018, p. 14).

The events in the second category belong to international governmental organizations, as well as non-governmental organizations and associations.

The International Congress and Convention Association (ICCA) is "the global community and knowledge hub for the international association meetings industry. ICCA currently represents over 1,100 companies and organizations, from nearly 100 countries worldwide, from all service categories within the meetings industry. ICCA's area of expertise is the international associations market.

4.2. The typology of association meetings

The market for international association meetings covers a wide range of types and categories of events, with medical themes (the most numerous), as well as themes pertaining to scientific, other academic fields, trade organizations, professional bodies, etc.

Although there are important differences between the categories of events, in terms of their size, duration, allocated budget, etc., few similarities can still be identified:

There is at least one organization holding one or more meetings in each specialized field;

Most of the associations' meetings are repeated at regular intervals, most of them annually;

The principle of venue rotation is respected, as the event rarely happens to be hosted in the same venue at short intervals:

The planning (choice) of the destination where the meeting would take place is done many years before the period of its development, often 5 years before;

The local stakeholder is usually a national association which initiates and hosts the meeting (ICCA, 2018, p. 14).

ICCA estimates that there are about 23,000 association meetings organized on a regular basis, 90% of which have been collected in ICCA's database.

However, the international meetings market is not analyzed only by ICCA, but also by UIA (Union of International Associations), even though the criteria of the two organizations are different. Thus, UIA defines "International Meetings", included in its statistics, as those events that meet one or both of the following two criteria:

1) Those meetings organized or sponsored by international organizations included in UIA's Yearbook of International Organizations and which have at least 50 participants (or an unspecified number of participants).

2) Those meetings which are not organized or sponsored by international organizations, but which nevertheless have a significant international character, in particular those organized by national organizations and national branches of international organizations, and wherein at least 40% of the participants come from countries other than the host country, at least 5 nations being represented. The duration of these meetings must be at least 3 days (or an unknown duration) and the event must also host an exhibition with at least 300 participants.

A third category of meetings included by UIA in its own statistical database is that of meetings which meet the conditions of the second category, but which last at least two days and the organized exhibition must have at least 250 participants. Strictly national meetings, as well as those with an exclusively religious, political, educational, commercial or sport theme are not included in UIA's statistics.

Although there is an obvious overlap between UIA's and ICCA's statistical databases, the most important difference between them, from a marketing point of view, is that the events in UIA's records include those hosted in fixed locations, while the events in ICCA's records must follow the rotation rule, being hosted, successively, by at least 3 countries.

The first category of events in UIA's statistics also includes intergovernmental and transnational meetings, such as, for example, those of the EU institutions or of ...

Some information on the content of the 61st UIA's International Meetings Statistics Report was provided in a July 25, 2020 press statement of UIA Statistics Coordinator, J. Fisker. In fact, UIA has been publishing such annual statistical reports since the year 1960.

The meetings included in UIA's database are those organized or sponsored by international organizations, as well as meetings of their main governing bodies, congresses, conventions, symposia, regional meetings bringing together representatives from several countries, as well as some national meetings with international participation organized by the national branches of international associations.

According to the data in this report, the total number of meetings in UIA's database for the entire period was 504,822, of which 465,381 were included in the report, being hosted by 11,468 cities in 254 countries and territories. In the year 2019, 12,472 meetings held in 161 countries were documented in UIA's records.

Of the 41,534 active international organizations, according to UIA's records, 25,709 were known to carry out activities related to the organization of meetings (Fischer, 2020).

4.3. The evolution of the meetings association market in the 1963 – 2017 period, according to ICCA's data

The special edition of ICCA's Statistics Report, produced on the occasion of ICCA's 55th anniversary, analyzed the evolution of the International Association meetings market in the 1963-2017 period.

During the analyzed period, the growth rate of the number of meetings in ICCA's database was of about 10% per year, i.e., practically the number of organized events doubled every 10 years. Thus, while in the 1963-1967 period, 1,718 organized meetings were recorded, in the 2013-2017 period, the number of meetings reached 65,182.

By major regions of the world (continents, subcontinents), there was a significant decline in the share of meetings hosted by Europe, from 71.8% in the 1963-1967 period to 53.6% in the 2013-2017 period, while the share of meetings hosted by Asia increased from 8.4% to 18.5% during the same period. Moreover, Asia managed to overtake North America, which, from a 13.3% share of events hosted in the 1963-1967 period, rose to a maximum share of 17.3% in the 1983-1987 period, after which the share declined continuously to only 11.7% in the 2013-2017 period. A significant increase was recorded by Latin America, whose share of hosted meetings steadily increased from only 4% in the 1963-1967 period to 9.6% in the 2013-2017 period (ICCA, 2018, p. 24).

In terms of ranking by the country hosting the events, the US has always occupied the first place during the period under review, starting with 167 meetings hosted between 1963 and 1967 and reaching 5,014 in the 2013 – 2017 period. Germany came second, with an increase from 144 to 3,633 meetings in the same intervals, followed by the UK (from 162 to 3,117), France (from 144 to 2,868), Spain (from 49 to 2,830) and Italy (from 100 to 2,666). A spectacular increase was recorded by People's Republic of China, which had no international meetings in ICCA's records in the 1963-1967 period, then hosted only one in the 1973-1977 period and it reached 2,186 hosted meetings in the 2013-2017 period.

The average number of participants in these meetings steadily decreased (by 66% over this period), from an average number of 1,263 attendees in the 1963-1967 period to only 409 attendees in the 2013-2017 period. Over the last 15 years analyzed in this report, the average number of

participants in these meetings has decreased by 15%, while the number of events has tripled over the same period (ICCA, 2018, p. 29).

In terms of the categories of meetings, according to their size (in terms of number of participants), it can be noted that meetings having between 50 and 149 participants have registered an increasing share, ranking first, starting from a share of 12% in the 1963-1967 period and reaching 40% in the 2013-2017 period. Continuous, but not as spectacular, increases were recorded by meetings having between 150 and 249 participants (from 12% to 22% over the same period), while meetings having between 250 and 499 participants had a share of 23% in the 1963 – 1967 period, peaked at 30% in the 1983 – 1987 period and then decreased to 21% in the 2013 – 2017 period.

The most severe decrease in percentage was recorded by meetings having 500-999 participants, from 25% in the 1963-1967 period to only 10% in the 2013-2017 period. Significant decreases were also recorded by meetings having 1,000-1,999 participants (from 13% in the 1963-1967 period to only 4% in the 2013-2017 period). In the last period analyzed (2013-2017), meetings having 50 to 249 participants were the majority (62% market share), and in the 55 years analyzed, the share of meetings having 150 to 249 participants almost doubled, while all other categories of meetings, with over 500 participants, suffered dramatic decreases in their share of the total organized meetings (ICCA, 2018, p. 30).

However, while the average number of participants has decreased, the total number of participants in organized meetings has grown at a very high rate, rising from about 2.1 million participants in the 1963-1967 period, to over 11.9 million in the 1998-2002 period and to over 28.7 million participants in the 2013-2017 period (ICCA, 2018, p. 31).

The highest estimated number of participants in these meetings, calculated by multiplying the total number of meetings held by the average number of participants per meeting in a given region or country, was recorded in the US, which remains at the top of the list throughout the entire 55-year period analyzed, with 2,095,712 participants just in the 2013-2017 period, followed by Spain (1,383,291 participants in the same period), Germany (1,318,984 participants), the UK (1,119,030 participants), France (1,057,565) and Italy (1,022,442).

There is a clear trend regarding the preference for the meetings organized in rotation. Whereas the share of meetings organized by rotation in different places of the world has decreased over the 55 analyzed years (from 77.4% to 43.7%), during the last 5 years analyzed (2013-2017), one can notice that the preference for the meetings organized by rotation to be hosted mainly in Europe has increased. Table no. 2 shows the evolution of the number of meetings, of the estimated number of participants and of the average number of participants in the 1963-2017 period, according to ICCA's estimates, and Figure no. 1 shows the evolution of the number of meetings organized during this period.

Table no. 2. The Association Meetings evolution in the 1963-2017 period

Meetings main indicators Period	Total number of meetings	Estimated total number of participants	Average number of participants
1963-1967	1,718	2,178,452	1,263
1968-1972	2,562	2,877,928	1,036
1973-1977	3,817	3,269,321	839
1978-1982	5,556	4,034,402	729
1983-1987	7,895	4,831,533	599
1988-1992	11,179	6,559,131	577
1993-1997	15,268	8,694,344	618
1998-2002	22,621	11,907,383	547
2003-2007	35,511	16,017,342	481
2008-2012	53,934	21,611,286	432
2013-2017	65,182	24,718,204	409

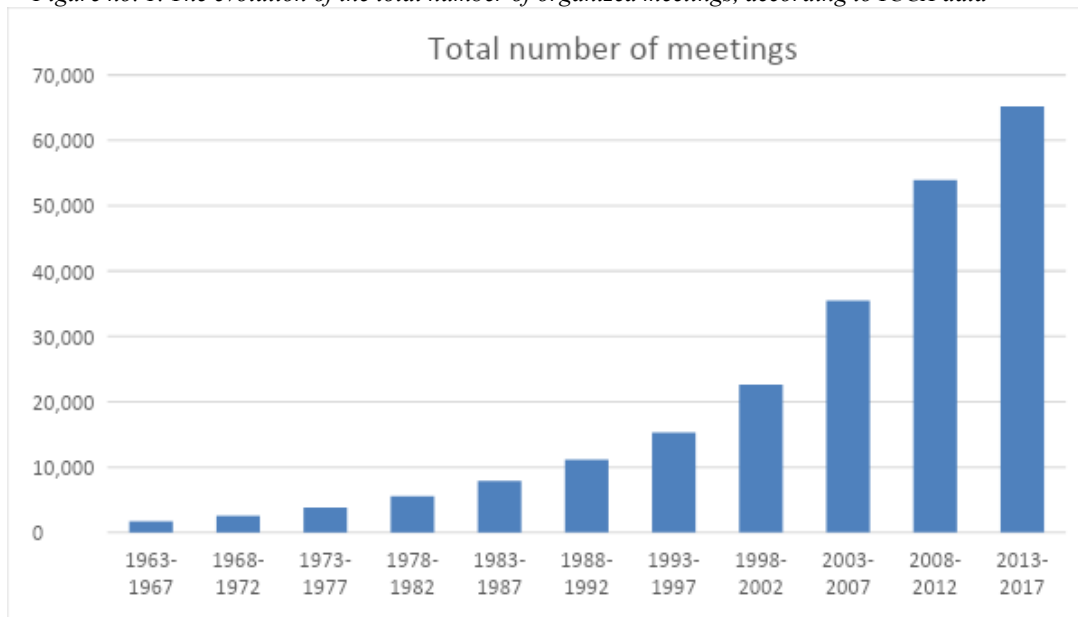
Source: ICCA Data Processing, 2018, pp. 22; 29; 31

4.4. The main evolution trends emphasized on the international association meetings market, as recorded by ICCA

Summarizing the results of ICCA’s research, over the 55 years analyzed, the main *trends* could be synthesized as follows:

- The spectacular, even exponential, increase in the number of meetings of international associations
- Europe remains the most popular region hosting these meetings, even if its market share has decreased over time
- The significant decrease in the average number of participants in these events
- While the average number of participants has continuously decreased, the total number of participants in these meetings increased due to the rise in the number of organized events
- The tendency to rotate the meetings between the countries in the same region, especially in Europe
- The most important increase in the share of meetings in recent years has been in the field of technology (technological meetings); however, those in the field of Medical Sciences remain the most numerous and popular
- The decreasing popularity of Conference/Exhibition Centers as a venue for meetings in recent years and the significant increase in the share of the meetings hosted by universities
- The continuing decline in the duration of the meetings
- The increasing share of meetings organized on an annual basis (ICCA, 2018, pp. 18-20).

Figure no. 1. The evolution of the total number of organized meetings, according to ICCA data



Source: ICCA data processing, 2018

4.5. The impact of the COVID-19 pandemic on the International Association Meetings, according to UIA

During the year 2022, UIA conducted a large-scale survey on the problems faced by the international organizations and associations which are hosting meetings. The 2022 survey was the tenth survey conducted by UIA, following those in the years 1985, 1993, 2002, 2009, 2013, 2015, 2018, 2020 and 2021, and it aimed to help all those involved in the process of organizing international meetings make sense of the changes that have occurred in recent years and of the challenges of the current international environment.

According to data from the International Congress Calendar, produced by UIA, whereas in the 2015-2018 period, the average number of international events organized was over 13,500 per year, with the exception of the year 2017, when their number dropped to 12,895, in the year 2019 the number peaked at 14,445, after which, due to the effects of the COVID-19 pandemic, in 2020 the number of organized events decreased dramatically to only 7,992 and it continued to decline in 2021 to 7,657 (UIA, 2022, pp. 3-4).

In the following, we are presenting a few developments and conclusions drawn from the answers to the surveys conducted by UIA in the years 2021 and 2022.

Thus, to the question "How many delegates usually attend your major international meeting (excluding accompanying persons and staff)?", most respondents (25% in both the year 2021 and in 2022) indicated meetings with 101-250 participants, followed by meetings with less than 50 participants (22% in 2021 and 19% in 2022), meetings with 251-500 participants (15% in 2021 and 18% in 2022) and meetings with 51-100 participants (down from 21% in 2021 to 14% in 2022). Somewhat surprisingly, the share of meetings with 1,001-2500 participants increased from 7% in 2021 to 13% in 2022 (UIA, 2022, p. 8).

International organizations made changes to the format of their meetings, transforming a large proportion of in-person meetings into virtual/online events (44% in 2021 and 36% in 2022). Moreover, they had to postpone or reschedule planned events by 29% in 2021 and 26% in 2022, and some meetings had to change their format from in-person participation to hybrid. 16% of scheduled events in 2021 and 13% in 2022 were cancelled with no prospect of rescheduling (UIA, 2022, p. 9).

However, the total number of cancelled meetings was not that high, considering the bans imposed by public authorities with regard to limiting the number of participants in an event or even banning the events from being held. Thus, according to the answers to the UIA surveys, most associations cancelled less than 5% of their major events (58% in 2021 and 49% in 2022), and some associations even managed not to cancel any events (27% in 2021 and 43% in 2022) (UIA, 2022, p. 11).

4.6. How international associations have been affected by the pandemic

In terms of how the pandemic has affected associations, most UIA surveys' respondents indicated a "Reduction in their income" (by 31% in the year 2021, respectively 29% in 2022), while others chose the answer "Reduced membership" (resignations or less renewals than expected), with a share of 19% in 2021 and 23% in 2022. Others mentioned the "Decline of sponsorship" (17% in the year 2021, respectively in 2022), and 15% in 2021, respectively 14% in 2022 indicated "Reduced donation/financial contribution". Only 7% of respondents in the year 2021, respectively 5% in 2022 chose "Staff dismissed or reduced hours" (UIA, 2022, p. 20).

Despite the above-mentioned negative impact and challenges, the overwhelming majority of respondents (84% in the year 2021, respectively 81% in 2022) were optimistic that their organization would be able to survive the economic and social impact of the pandemic, while 14% of respondents in both years answered that this would depend on the duration of the pandemic (UIA, 2022, p. 22). Since the pandemic appears to have already ended in most countries of the world, with only a few exceptions, such as, mainly, China, those who gave such an answer have less cause for concern.

4.7. Why face-to-face events are preferred by the participants

After a large number of events, which were not cancelled or postponed, during the pandemic period were organized in online or hybrid format, we believe that event organizers are justified in asking themselves about the changes in the behavior of business travelers participating in this respect. How many of them will abandon in-person participation in favor of online or hybrid participation?

The German Convention Bureau (GCB), the Fraunhofer Institute for Industrial Engineering IAO and their research partners carried out a study in order to identify changes in the patterns of business travel and in-person event participation. In the first phase of the research, titled "Redefining Event Attendance", the Future Meeting Space (FMS) innovation network explored the reasons why people choose to attend or not attend future business events in-person.

The results of the first two phases of the research revealed the following clear trends in terms of the participation in face-to-face events: the need for networking and the opportunity for the participants to generate new ideas during the discussions.

People's travel behavior has changed significantly in recent years due to the advances related to the means of transportation for persons and in the field of digitalization.

Obviously, when a person has a choice between attending an event online and in person, they also consider the cost of attending, which is much lower in case of the online option.

However, the results of the research also highlight the importance of the social aspects of attending certain events. Thus, face-to-face events create opportunities for people to interact with each other and to generate new ideas and inspiration. 82% of those surveyed responded that they get new ideas from the face-to-face events that they attend, and 74% of them said that attending such events provides them with important changes compared to their day-to-day work activity. Moreover, destinations offer, in today's digitalized world, authentic experiences and services.

The second phase of this research focused on the overall attractiveness of business and professional travel and how it contributes to employee recruitment and retention. The third and final phase of the research was due to be completed in December 2022, when the results would be presented at a virtual event. The objective of this phase of GCB's research was to identify the key components that would lead to the development of attractive and effective conferences and meetings (GCB, 2022).

Therefore, the results of this research can be considered encouraging for event organizers, as well as event venue owners, as many participants want to be present in-person at such events.

5. Conclusions

The analysis of the evolutions in the international association meetings market has revealed certain trends, which have been apparent over the last few decades, but also more recently with the restrictions imposed by the authorities after the outbreak of the COVID-19 pandemic.

These include a reduction in the average number of participants per meeting, and in the last two years an increase in the number of meetings organized online or in hybrid format, to the detriment of those organized with in-person participation.

In order to adhere to the maximum dimensions required by the editor, this paper could not include the analysis of the evolution of other categories of events, such as exhibitions, which will be the subject of a separate analysis.

We consider that further research into these evolutions is needed, both from the perspective of the organizers of such events, and from that of the venue owners. Particularly difficult will be the decision of those who have proposed to build new Conference/Congress or Exhibition Centers, as well as conference rooms within hotel establishments. The bans during the pandemic period related to limiting the number of participants in an event or even banning the organization of events have severely affected the owners of these venues, and the trend towards more and more events being converted into a hybrid or online format is likely to call into question the efficiency of the use of the venues set up for this purpose. However, some research results also show that many participants are opting for in-person events.

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