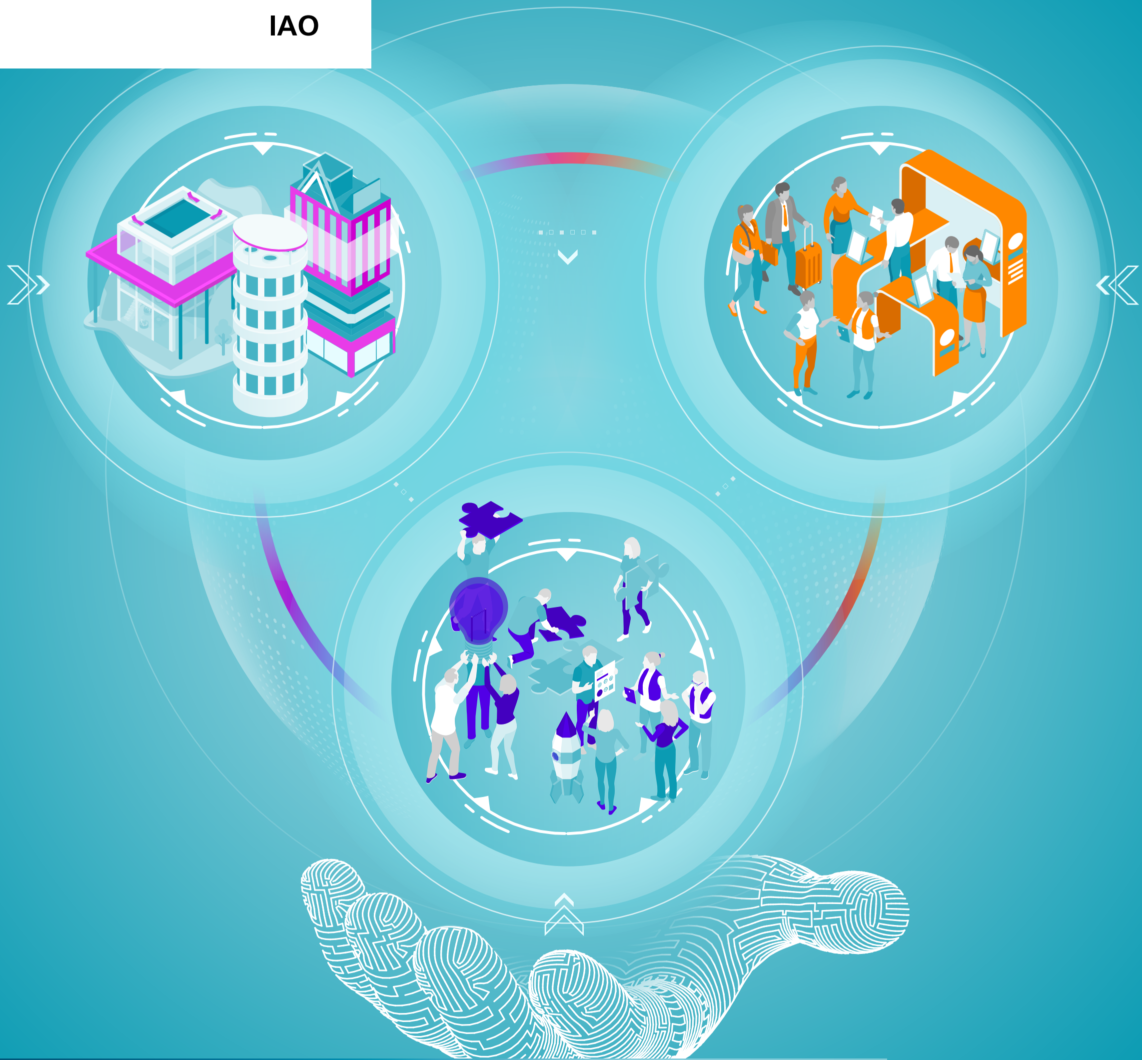

Milena Bockstahler, Tilman Naujoks, Stefan Rief

Redefining Event Attendance

In-person events as a tool for employee networking, retention and inspiration

Innovation Network "Future Meeting Space"

Co-Initiator:

Ed.: Wilhelm Bauer, Stefan Rief, Matthias Schultze

Preface

Together with partners who are interested in innovation, the Fraunhofer Institute for Industrial Engineering IAO and the GCB German Convention Bureau e. V. have been engaging in joint research under the umbrella of the "Future Meeting Space" innovation network since 2015.

From the very beginning, one of our key objectives was to strengthen the role of business events as a driver of innovation and an essential instrument of corporate communication. Using trend research methodologies, we anticipate relevant developments in the ecosystem of events and identify requirements for successful events as regards concepts, technology and event spaces.

The event ecosystem has become increasingly complex and at the same time more fluid in recent years: Megatrends such as sustainability, flexible/mobile working, digitalisation and security are global and often simultaneously occurring phenomena that cannot be viewed in isolation as they influence each other mutually.

Especially in view of these multiple change processes, business events are as relevant as ever because they can contribute considerably to finding solutions for complex problems. People who come together in a professional context ensure knowledge transfer and build new networks. Business events thus provide platforms on which to work on finding answers to the big questions of our time.

At the same time, a constantly changing world means that the patterns and motiva-tions with regard to event attendance and business travel are also changing. Our 2022 research focus "Redefining Event Attendance" was therefore chosen to understand why people will decide for or against attending events in person in the future. This understanding and corresponding measures provide all industry stakeholders with a foundation on which to build relevant, successful and innovative business events of the future.

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Content

1. Status quo

1.1 The importance of business events

Meetings, conferences and congresses are platforms for the exchange of knowledge, experiences and ideas. They provide essential input for political, economic, scientific and social processes and thus promote innovation and new solutions.

For Germany as a business location business events are traditionally a key economic factor. In 2019, almost three million events with over 420 million attendees took place in Germany. Before the start of the pandemic, Germany was regularly named as a top international meeting and convention destination, e. g., in the "IPK World Travel Monitor"[1] or in the ranking of the "International Congress & Convention Association" (IC-CA)[2]. In particular, the excellent global image of "brand Germany", the diverse skills available in business and science as well as the country's commitment to sustainability and its excellent infrastructure create a very good foundation for remaining in this top position in the future.

Due to a variety of influencing factors, and not least the pandemic, the market for meetings, conferences and congresses has changed significantly in recent years, both quantitatively and qualitatively. While in the first year of the pandemic, there was a significant decline in attendance and an exponential increase in online attendees due to cancellations and postponements, the "new now" is taking shape now. According to the "Meeting & EventBarometer 2021/2022"[3], hybrid events in particular are emerging as a future-proof market driver. Of a total of 68.4 million people who attended business events in person in 2021, 50 million attended in-person events (2020: 60 million) and 18.4 million (2020: 1.8 million) attended hybrid events. The central research questions of the research conducted in 2022 were developed not least in view of these changes in the market.

1 https://ipkinternational.com/destination_performance

2 https://www.iccaworld.org/npps/story.cfm?nppage=10119244

3 https://www.gcb.de/en/wissen-und-innovation/meeting-and-eventbarometer/

1.2 The current, post-pandemic situation

The business events ecosystem is currently undergoing enormous change. Multiple influencing factors, and in particular the aftermath of the Covid-19 pandemic, are significantly impacting this ecosystem. Although meetings, conferences and congresses were particularly affected by the pandemic restrictions, it is nevertheless evident how changing conditions can trigger a quantum leap. Especially when it comes to digitalisation and the organisation of hybrid events, the pandemic has acted as an accelerator and inspired a wide range of new solutions. It did not take long for events to shift from physical to online spaces and it is obvious that the business events market will permanently change – both quantitatively and qualitatively – due to the pandemic experience.

In order to be able to better classify current developments and trends in the overall context of this changed ecosystem, a fundamental analysis of the changes in the environment that events exist in is necessary. Current studies deal with the future of the events market, especially with regard to the occupancy of event venues and hotels as well as in relation to travel to visit destinations and the booking volume of transport providers. It becomes clear that people will travel more in the future and seek out face-to-face meetings. However, it needs to be stressed, that these occasions will be chosen after more careful deliberation than before the pandemic. Besides the finding that face-to-face meetings will continue to be the central motivation for travel, there has been little research to date on the specific reasons and occasions for physical meetings in the future. Therefore, stakeholders in the business events sector need to ask the question why people will decide to attend in-person meetings, congresses and other business events.

lead to a major decline in travel but that the combination of both will combine to reduce revenues.

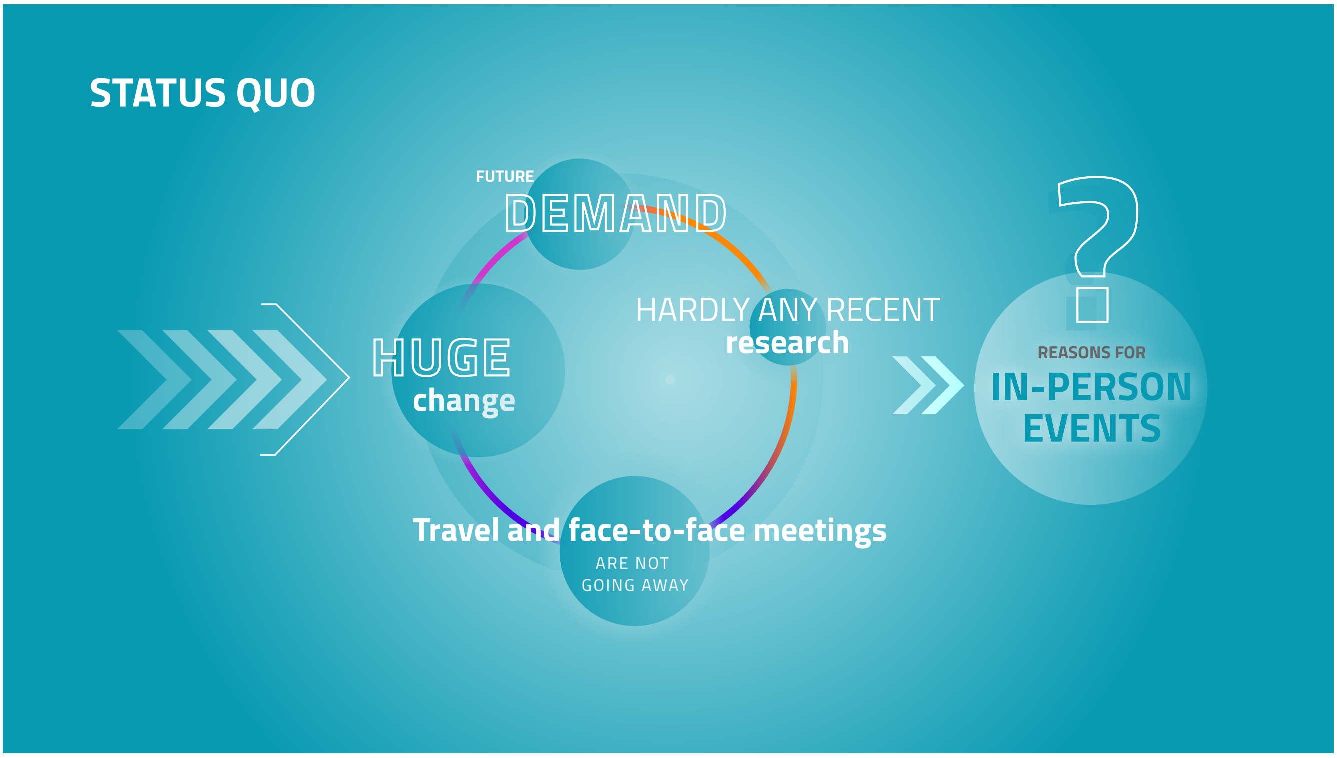


Fig. 1: Status quo leading to research question.

As an initial step to answering this question, the "Future Meeting Space" innovation network undertook broad preliminary research and analysed existing studies to identify white spots in the research[4]. To that end, we looked at more than 80 international studies, articles and reports and evaluated the findings. Based on the topics "business travel", "general travel trends", "effects of the pandemic", "motivation for visiting events" and "sustainable transport", the status quo and white spots, i. e. unresolved issues, for the events market of the future were identified and evaluated.

One interesting finding of this analysis relates to the combination of business travel and leisure tourism, so-called "workcations". The analysed studies show that especially younger generations like to extend business trips for the purpose of such workcations. It can therefore be said that the importance of workcations will continue to increase due to the high flexibility in the working world. Another observation is that although there has been a general decline in travellers, travel and related expenditure since the Covid-19 pandemic, this decline is increasingly being put into perspective. The assumption is that neither cost alone nor sustainability considerations are likely to

4 https://www.gcb.de/en/germany-meetings-magazin/mice-think-tank/fms-studienradar/

Before the Covid-19 pandemic, business trips were mainly motivated by the wish to maintain contacts and to engage in networking. However, there is currently hardly any research available that analyses why people go on business trips post-pandemic. These findings of our review formed the basis for the research questions for our 2022 research phase entitled "Redefining Event Attendance".

1.3 The "Future Meeting Space" innovation network

The "Future Meeting Space" innovation network was founded by the GCB German Convention Bureau e. V. and the Fraunhofer Institute for Industrial Engineering IAO in 2015, with the key objective of strengthening the role of business events as a driver of innovation and an essential instrument of corporate communication.

Using trend research methodologies, we anticipate relevant developments in the ecosystem of events and identify requirements for successful events as regards concepts, technology and event spaces. Our innovation network develops topic-specific and distinct recommendations for different stakeholder groups and regularly validates them in a real-life lab with what is happening within the industry in practice. As one of the world's leading destinations for meetings, conferences and congresses, Germany stands for innovation, sustainability and comprehensive expertise in key sectors of business and science. Against this background, the GCB German Convention Bureau e. V. and Fraunhofer IAO as "Future Meeting Space" initiators, together with a diverse range of research partners, take on the role of catalysts for the future of business events "made in Germany".

1.3.1 "Future Meeting Space" initiators

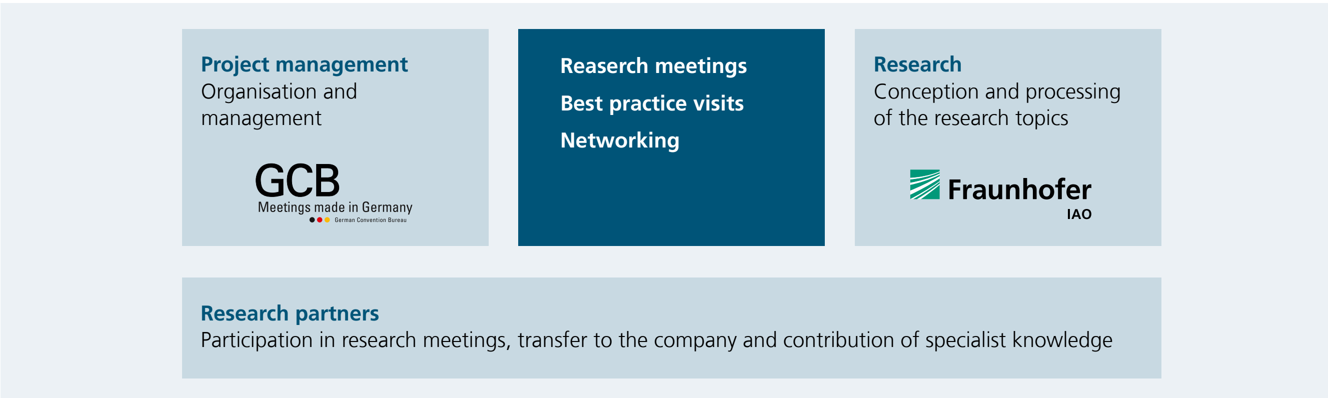
The GCB German Convention Bureau e. V. represents Germany as an internationally leading and sustainable destination for conferences and meetings. It supports its members and partner organisations in marketing and positioning their offerings within Germany and abroad and provides thought leadership. The GCB's 160 members represent almost 380 businesses and include leading hotels, convention centres, ven-ues, destination marketing organisations, event agencies and service providers within the German meetings and conventions industry.

The Fraunhofer Institute for Industrial Engineering IAO is part of Fraunhofer-Gesellschaft, one of the largest organisations for applied research in Europe. The central task of Fraunhofer-Gesellschaft is "research for practice" in close cooperation with industry and public sector clients to advance innovation processes and the development of key technologies.

1.3.2 "Future Meeting Space" partners

To achieve our objectives, we partner with innovative technology companies, solution providers, event organisers and destinations. Our 2022 research partners are:

- 7 Cities
- AllSeated GmbH
- Bayer AG
- Bayern Tourismus Marketing GmbH
- Bochumer Veranstaltungs-GmbH
- Encore – represented by KFP Five Star Conference Services GmbH
- EVVC Europäischer Verband der Veranstaltungs-Centren e. V.
- Fraport AG – aviation partner
- JenaKultur / Jena Convention Bureau
- Köln Tourismus GmbH
- Leipziger Messe GmbH
- Münster Marketing GmbH / Messe und Congress Centrum Halle Münsterland GmbH
- Nürnberg Convention / Nürnberg Messe GmbH
- PwC– PricewaterhouseCoopers GmbH
- Radisson Hotel Group
- Siemens AG



2. 2022 research phase

2.1 Objectives and structure of research

The objective of our research carried out in 2022 was to enable industry stakeholders to react to the changed events ecosystem and to provide recommendations that enable them to meet the future requirements. The research process focused on the following questions: Why, how and how often will people attend in-person events in the future and what is the added value people gain from attending in-person events?

Our review of existing research enabled us to identify important topics as a base for designing three empirical surveys. The approach of conducting three consecutive surveys was chosen to be able to react quickly and adapt to changes.

The first survey focused on the occasions, motives and reasons for attending in-person events in the future and how the frequency of attending in-person events is changing. The second survey looked at how business travel and attending meetings and conferences contributes to retaining and attracting staff. At the same time, the extent to which business travel and event attendance serve as inspiration, contribute to the generation of new ideas and can be seen as a driver of innovation was considered. The third survey was dedicated to establishing what business events and destinations will have to offer in future to fulfil the expectations of attendees. In this survey, we identified service components of on-site events and their respective host destinations for different types of events in order to be able to map the best possible corresponding combination of different services for attendees in the future.

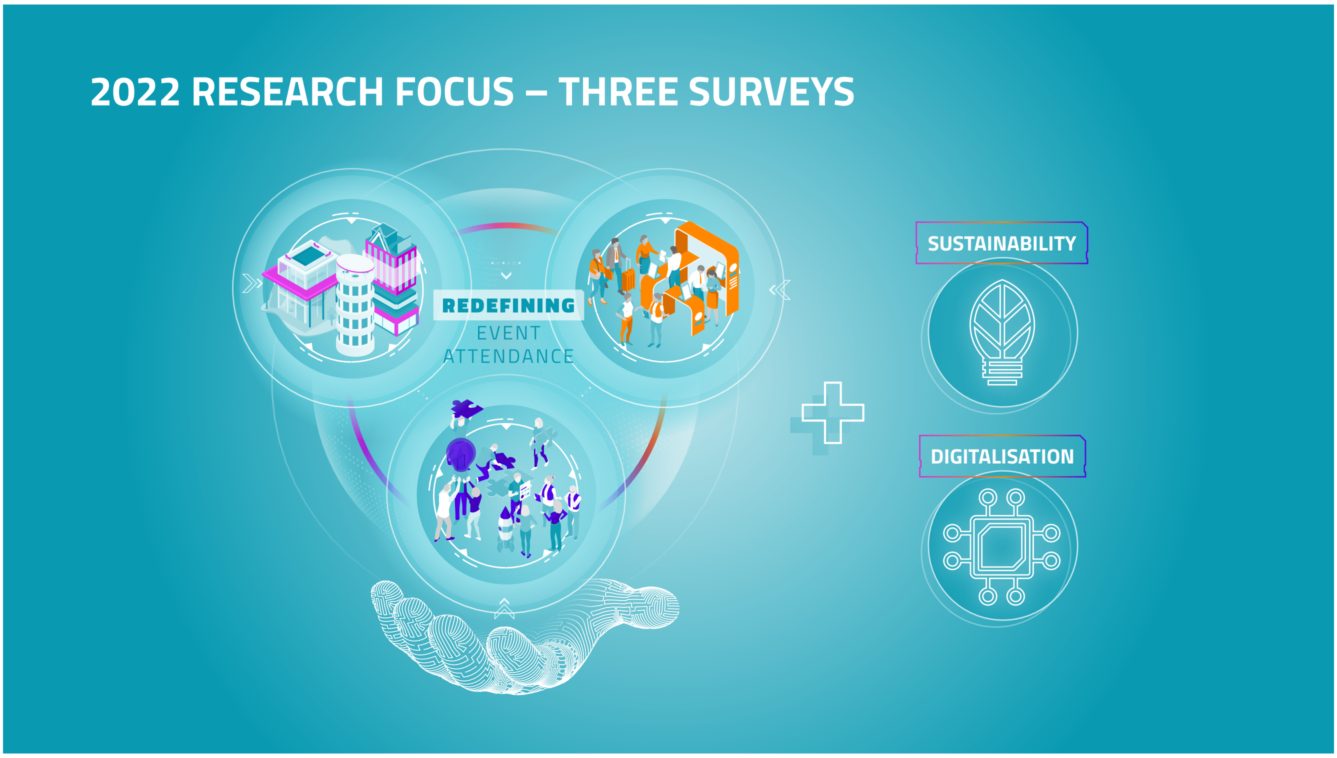


Fig. 2: Focus of the three surveys conducted as part of the 2022 research phase.

In addition to the three surveys, we worked with various focus groups during our research to represent different target groups, including members of Generation Z, and in order to gain insights into other important topics such as the staff and skilled labour shortage.

2.2 Breakdown of survey respondents

The fifth research phase of the "Future Meeting Space" innovation network lasted from January to December 2022 and included conducting three surveys in which a total of over 5,000 people took part.

A total of 1,280 people took part in the **first survey**, 84 percent of whom stated that they lived in the DACH region (Germany, Austria, Switzerland) at the time of the survey. The survey was conducted between 21 March and 30 April 2022 and included a total of 21 questions on the reasons and requirements as well as personal motivation for attending business events.

In the **second survey**, a total of 1,921 people were interviewed, 89 percent of them from the DACH region. The survey was conducted between 8 June and 13 July 2022 and included a total of 22 questions on the effect of business travel and event attendance on employer attractiveness and staff loyalty as well as on the generation of ideas and inspiration.

A total of 2,147 people took part in the **third survey** which was conducted between 13 September and 6 October 2022 and included a total of 21 questions to identify what makes in-person events attractive and what constitutes important service components. Of the respondents, 42 percent stated that they lived in the DACH region. The other participants were distributed as follows: 25 percent in other European countries and 33 percent in North America. Thus, this was a very international sample.

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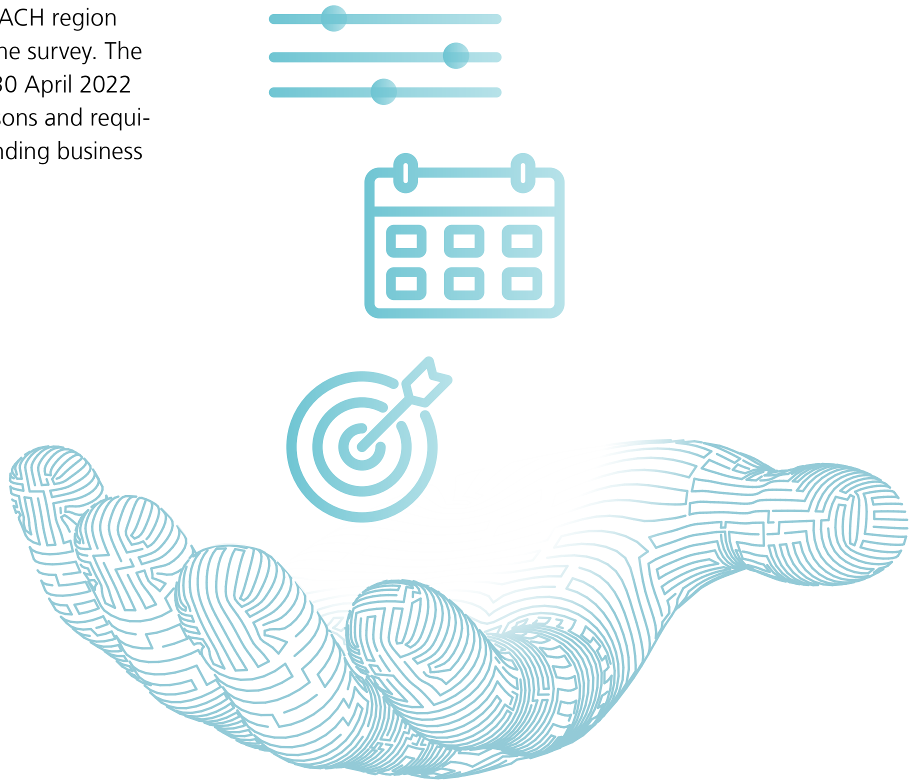

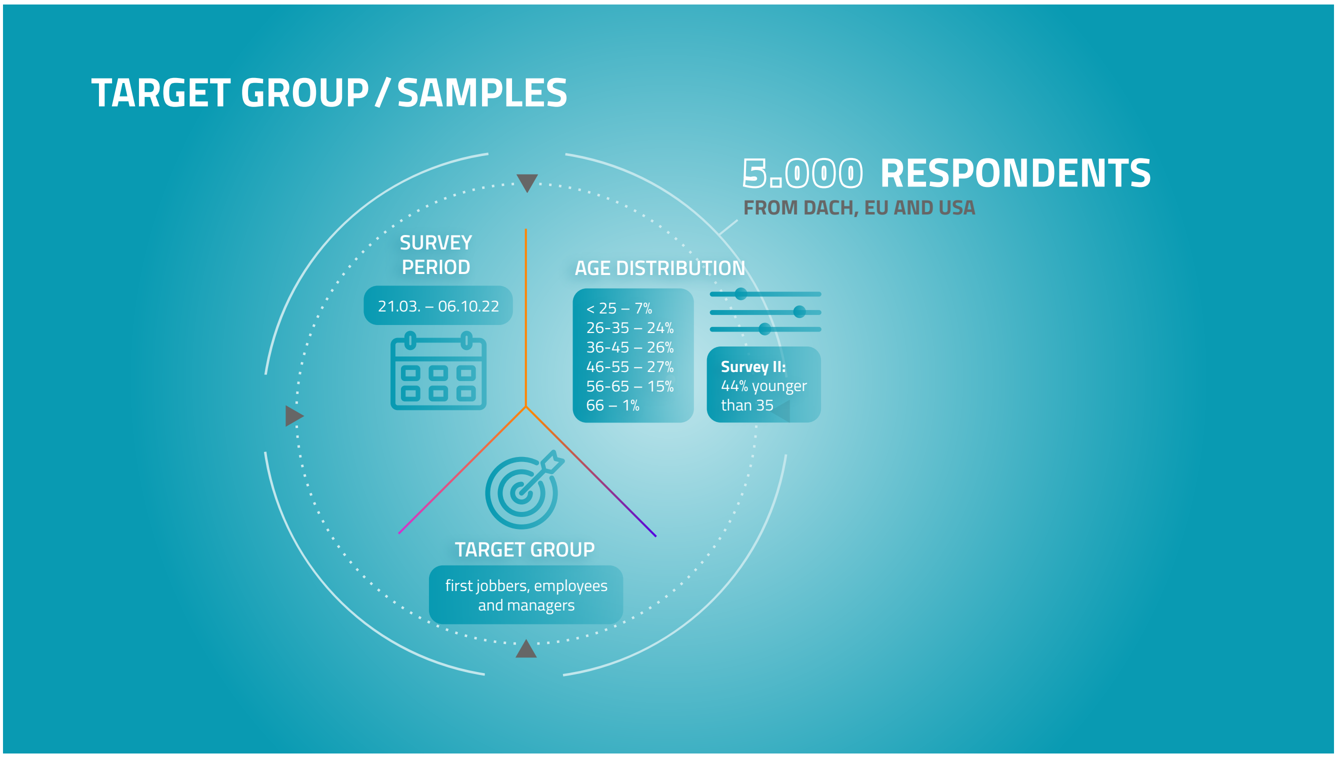

Fig. 3: Breakdown of survey respondents.

Across all three surveys, the proportion of women and men surveyed was largely balanced. The proportion of people who chose "diverse" or "do not want to specify" as their gender was less than 2 percent. Respondents included first jobbers as well as employees and managers from various sectors, including public institutions, the health and care sector as well as wholesale and retail. This range of sectors means that more cross-sector and cross-target group insights could be generated. In terms of age, respondents were predominantly in the period of their professional life. The sample in the second survey had a particularly high proportion of respondents under 35 years of age (44 percent). For the evaluation of the results, it was accordingly possible to reach a target group that is more likely to be at the beginning of working life which enables redefining employer attractiveness.

A broad spectrum was also covered in terms of the size of the companies in which the respondents worked, covering anything from less than 50 to over 2,500 employees. Of the respondents, 26 percent said they worked in a company with fewer than 50 employees, 20 percent in companies with 50 to 250 employees, 13 percent in companies with 251 to 500 employees, 16 percent in companies with 501 to 2,500 employees and 25 percent in companies with over 2,500 employees. Of the respondents, 9 percent were self-employed and 90 percent were in a salaried position, of which 39 percent of the respondents stated that they were employees without responsibility for personnel and 61 percent of the respondents stated that they held a management position.

3. Survey 1: Reasons for travel and motivation for attending in-person events

3.1 Aim of survey 1

The first survey aimed at establishing the reasons and motives for attending events in the future as well as identifying the reasons for or against travelling to in-person events. Due to the Covid-19 pandemic, private and professional everyday life has changed considerably, which in turn has an enormous impact on travel behaviour. The question for the future is: When do people attend online events and what are the reasons for travelling to in-person events?

The first survey was aimed at employees and managers from all sectors who frequently attend business events and therefore tend to be people with a lot of travel and event experience.

3.2 Key results of the first survey

3.2.1 Development of business events

In the future, people will continue to enjoy attending in-person events and see this as an important change from their daily office/working from home routine. However, they now expect different and more specific things from in-person evens in comparison to pre-Covid times. The pandemic has shown that some events, especially when focusing on knowledge transfer, also work very well as online events. In the future, the relation-ship between the duration of the event and the travel cost/time needed for attending will play a much more central role in the decision to attend events in person than it did before the pandemic.

More than before, people will question what added value the event offers and whether it is worth the effort of travel, both in terms of time and financial resources. Hence, every event attendance is preceded by a deliberate decision to do so. Moreover, not all people travelling to events make the decision themselves whether to attend in person. For about a quarter, this decision is taken by their superiors. This means that during the approval process, justification needs to be provided why an event should be attended in person.

3.2.2 Reasons for attending in-person events

When deciding to attend an event in person, the number of attendees and the group of people attending plays a role that should not be underestimated. It seems that people draw each other to events. Thus, it is not surprising that, with 91 percent, networking is the central reason for the respondents to attend in-person events. In addition, when planning and running in-person events their impact on the climate needs to be considered: Almost 60 percent of the respondents agree with the statement that in the future, travel activities need to strongly consider their impact on climate.

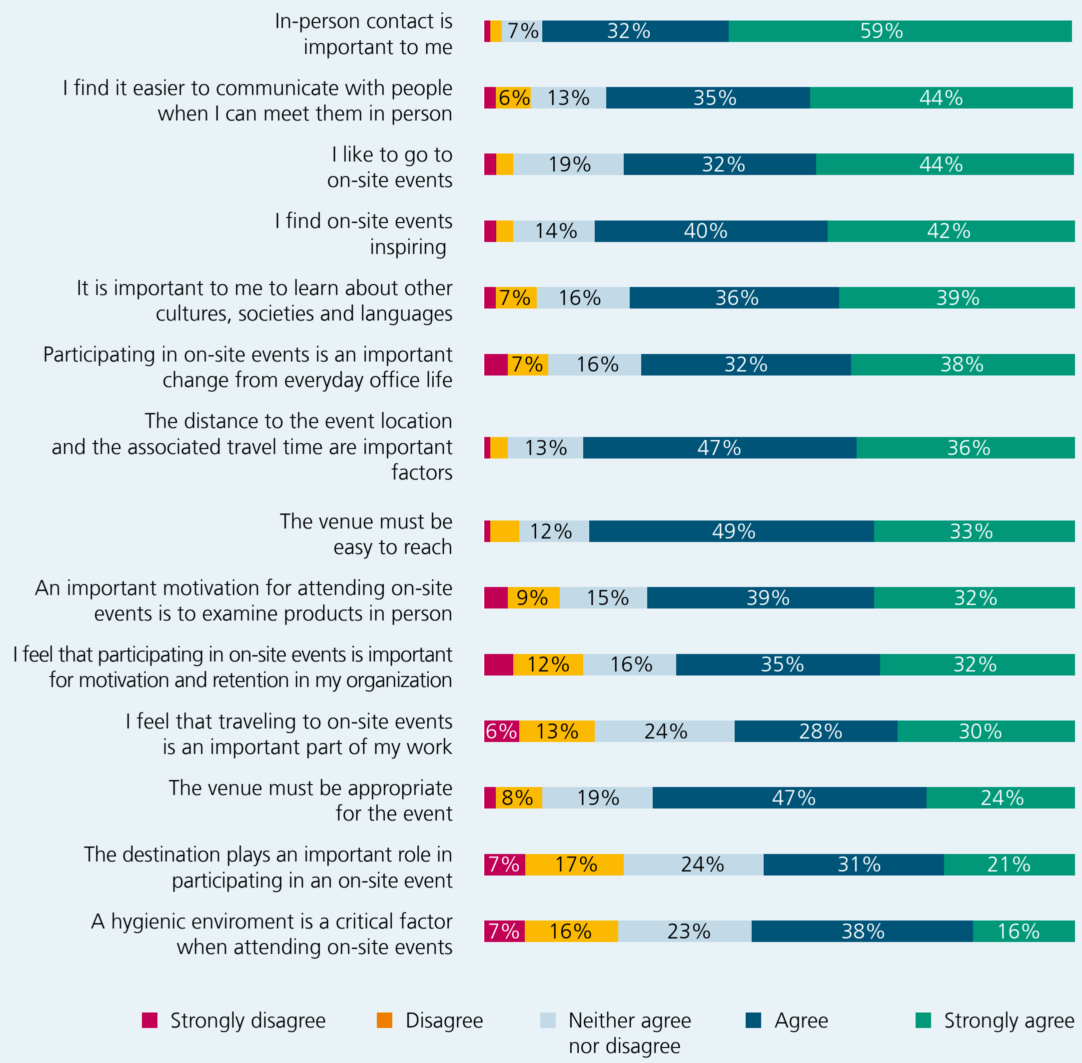

Fig. 4: Reasons for attending in-person events.

3.2.3 Summary of results

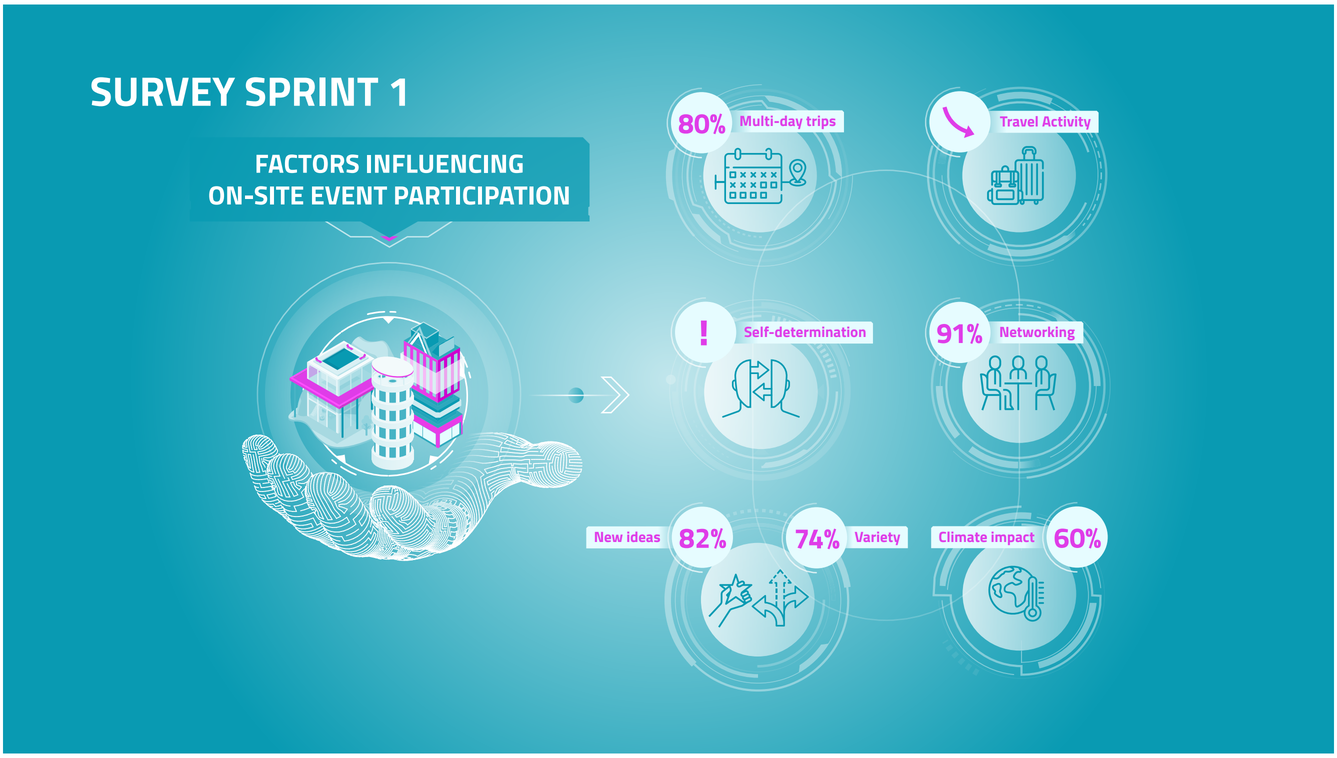

Fig. 4: Factors influencing in-person event attendance.

Self-determination has a considerable impact on how often people attend in-person events

People who can decide for themselves make 30 percent more trips to events than people who cannot decide for themselves. It is interesting to note, however, that deciding for yourself or someone else making the decision does not have an effect on the perceived burden of travelling to events.

Ratio of one-day and multi-day trips to events adjusting to pre-pandemic level in the long term

The survey results show that, in the future and in line with prepandemic figures, multiday trips will account for around 80 percent of all business trips to events. At the same time, a suitable ratio between event duration, travel times, and travel expenses is an important factor for attending events.

Networking even stronger reason for attending events in person than before the pandemic

91 percent said that they will in the future attend events to network. According to 79 percent of respondents, this is easier in an environment where you can meet people face-to-face. In addition, the number and make-up of attendees are relevant as people take cues from each other while cost and people's workloads are not as important as reasons that might prevent attendance. 60 percent agree that future travel to events definitely needs to consider the related climate impact.

In-person events as a source of ideas and inspiration

Another motivation for attending in-person events, with a very high approval rate of 82 percent, is the desire to be inspired and get new ideas. For 74 percent, events are an important break from everyday office life.

4. Survey 2: Employer attractiveness and source of inspiration

4.1 Aim of survey 2

The second survey focused on general attractiveness of business travel and its contribution to staff retention and recruitment. In addition, the aim was to find out to what extent travelling for business and to events can be a source of inspiration for new ideas and innovation. The pandemic has changed travel behaviour and established new forms of digital collaboration and interaction. However, we can already see that travel for business and to events will continue to play a role in business life. Business travel has always been associated with different attributes including providing a change to the daily routine, enabling networking, providing inspiration, being a sign of success and status or causing strain and stress.

Considering the skilled labour shortage and the changed behaviour and expectations due to the pandemic, a number of relevant questions arise for the future that our second survey intended to answer:

- Does travelling for business and to events help retain and attract employees?
- What kind of business travel enhances loyalty of employees to their organisations?
- Do business trips and business events matter at all for people when applying for jobs and choosing their employer?
- To what extent does travelling for business and to events act as a source of inspiration for new ideas and innovation?

The second survey was aimed at first jobbers and employees in an advanced stage of their career as well as at managers from all sectors. Undertaking regular business trips and travel to events was not a prerequisite for taking part in the survey.

4.2 Key results of the second survey

4.2.1 Travelling for business and to events as a means of attracting and retaining staff

In order to identify the decisive factors for employer attractiveness and loyalty to employers, the respondents were asked to select the five most decisive factors from a list of 17. While good leadership shows the highest approval ratings with regard to employer attractiveness and employee loyalty across all age groups, a good atmosphere among colleagues and identification with the company's services/products and brand also play an overriding role for the majority of respondents. Business trips and travelling to events rank in the bottom third across all respondents, however, the opportunity for interesting business trips and trips to events is a central means of attraction and retention, especially for people who say they like to travel for business. Accordingly, the option to undertake interesting business trips is ranked fourth by this group of people out of a total of the 17 surveyed factors for employer attractiveness and employee loyalty

Factors that – somewhat surprisingly – are at the bottom of the list are a sustainable corporate culture and measures to reduce CO_2 emissions, as well as the diversity of the staff and an inclusive corporate culture. In this context, there were no differences between generations, i.e. for younger generations these factors do not play an overriding role in the attractiveness of and loyalty to their employer.

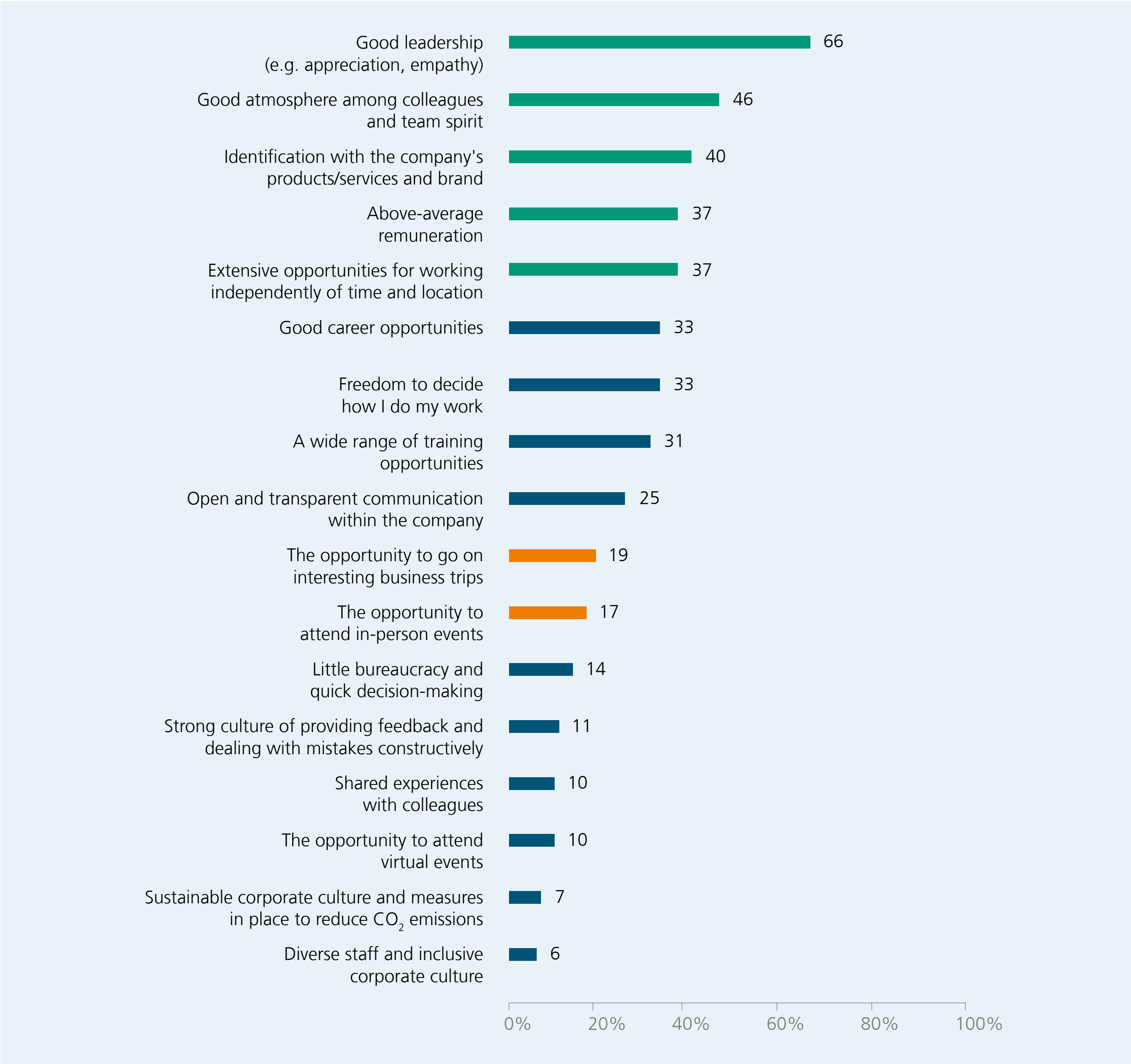

Fig. 6: Factors influencing employer attractiveness and staff retention.

4.2.2 Business trips and event attendance as sources of inspiration and ideas

In order to establish the sources of inspiration, the respondents were asked to indicate from a list of 15 situations in total in which of these situations they generate most ideas for everyday professional life. Measured in terms of total working days per year, the share of days at events accounts for about 5 percent of working time on average. During this time, around 9 percent of the respondents' ideas for everyday working life are generated, which is a very significant value when put in relation to the total working time. According to this, other sources of inspiration, such as creative interactions with colleagues (12 percent), while working in the office (12 percent) or at home (11 percent), are to be classified as much lower in relation to the total working time in terms of their inspirational power. The majority of employees are much more often in these situations than at events.

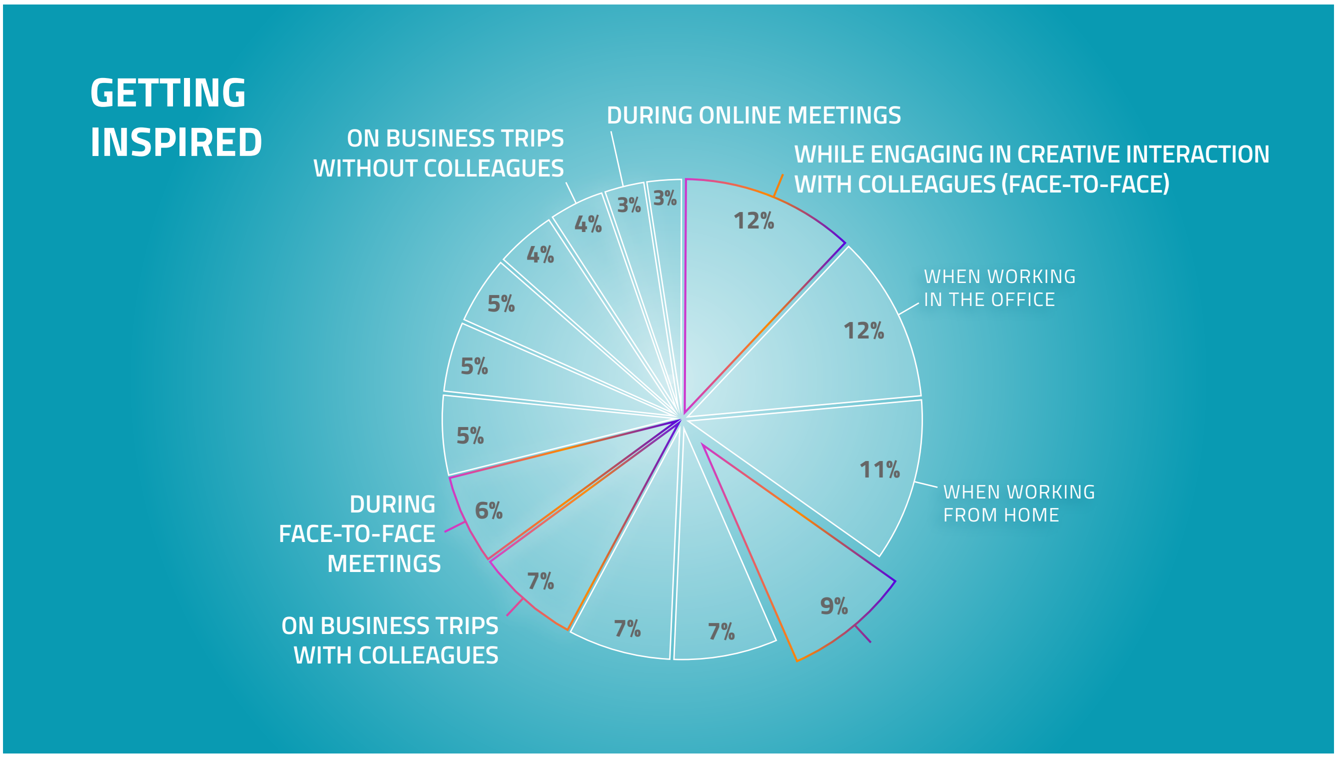

Fig. 7: Sources of inspiration and ideas in everyday work life.

4.2.3 Summary of results

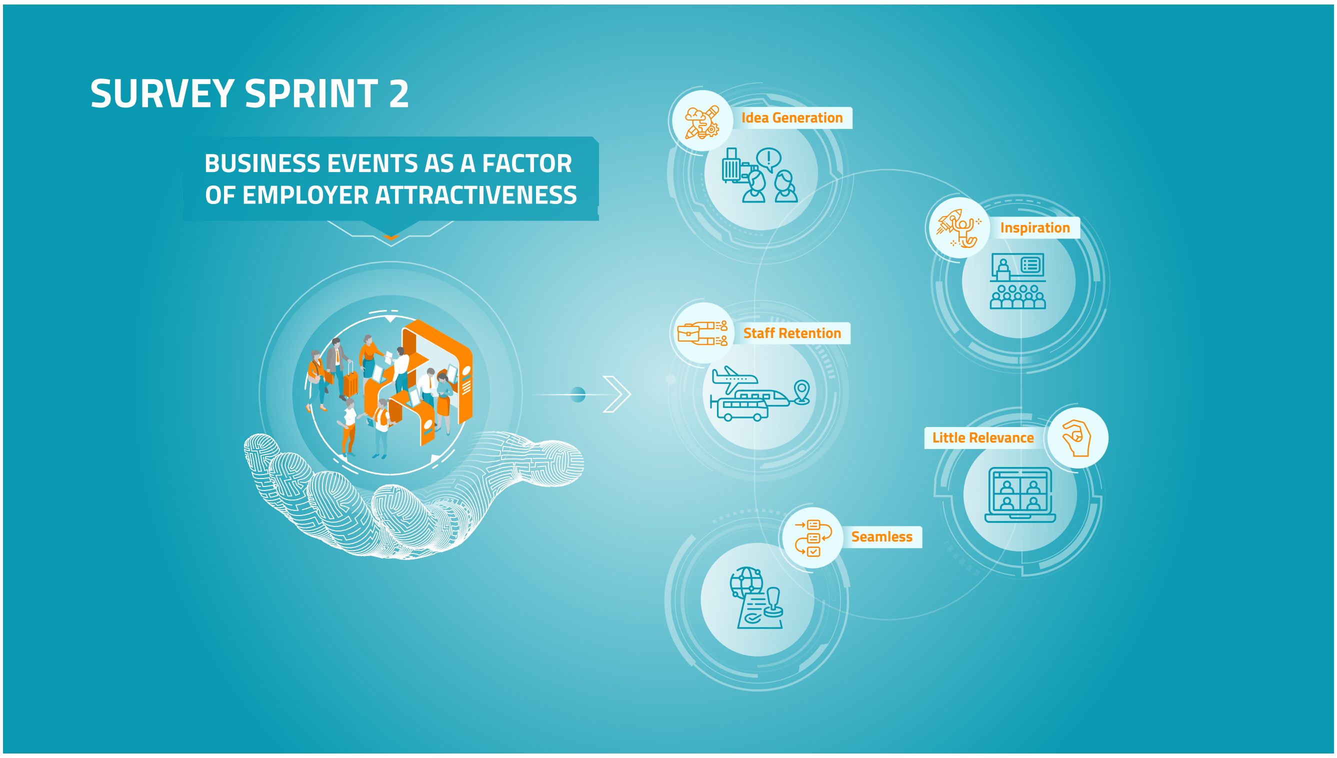

Fig. 8: Effect of events on employer attractiveness.

Interesting business trips and in-person events contribute to employer attractiveness and improve staff retention

In addition to good leadership and a good team atmosphere, the opportunity to go on interesting business trips and attend events in person also contributes to employer attractiveness and staff retention. This effect is particularly pronounced among people who say they like travelling a lot. For them, business travel ranks at number four out of a total of 17 factors surveyed.

Higher rate of ideas and inspiration generated during business trips and at in-person events

The survey respondents generate most ideas for everyday work life when engaging in creative interaction with their colleagues (12 percent) and when working in the office (12 percent) or at home (11 percent) The generation of ideas through attending in-person events is in fourth place with 9 percent. Ideas are also generated on business trips with colleagues, which is a source of inspiration for a total of 7 percent of respondents. However, only 5 percent of working time is spent on attending events in comparison to the time spent working in the office or from home than is spent in the office or from home. This significantly increases the rate of inspiration and idea generation during trips and while at events compared to normal office life.
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In-person events as a major source of inspiration

In-person events are a crucial source of inspiration. This point is made clear by the fact that the respondents have only generated 3 percent of their ideas and inspiration while attending online meetings while the figure for in-person events, on the other hand, is 9 percent. Measured in terms of the number of total working days, the share of event days is 5 percent, which means that in-person events with their allocated 9 percent for idea generation can be defined as the top source of inspiration.

Face-to-face interaction and net-working make future travel and event activities attractive

70 percent of the respondents cite face-to-face interaction and networking as factors that make future travel and event activities attractive. For around 73 percent, easy planning and approval of workrelated trips are an important factor for making business travel and attending in-person events attractive. This processrelated factor is also shared by those people who tend not to like to travel: This groups rates a high level of comfort on business trips as an incentive for future business travel and trips to events.

5. Survey 3: Service components of in-person events

5.1 Aim of survey 3

The third survey focused on the question what events and their respective host destinations have to offer so that people attend in person, including questions on event formats, content and experiences at events and how these differ depending on the type of event. The aim was to identify the key aspects and service components that make events attractive in order to identify how to create attractive and effective in-person events.

The survey was directed at first jobbers and employees with a longer career history as well as managers from all sectors.

Our third survey was based on the socalled KANO model. With a view to customer satisfaction, this method is used to understand, categorise and prioritise different types of customer requirements for new products and services. In a first step, the respondents were asked to choose from a list of seven different types of events (1. internal event of my organisation/company, e. g. strategy meeting; 2. seminar, training; 3. project meeting, network meeting with several partner organisations involved; 4. congress, forum, symposium; 5. annual general meeting, members' meeting; 6. events, e. g., product launch, visiting a brand space, gala; 7. trade fair, exhibition) to indicate whether they prefer to attend these events online or in person. In a second step, those events that were attended in person were evaluated on the basis of three different aspects, i. e., "Getting there and transport at the destination", "On-site offers and experiences" as well as "Other on-site factors". Each of these aspects included a list of different service components that the respondents were asked to assess on their importance, on a scale from "indifferent" to "being enthusiastic" about them.

5.2 Key results of the third survey

5.2.1 "Getting there and transport at the destination"

About 90 percent of the respondents consider it absolutely necessary that the event venue is easy to get to and that there is easy and quick use of public transport available. In order to promote the importance of the use of climatefriendly means of transport and the compensation of CO_2 emissions, which currently matters to about two thirds of the respondents, working with gamification and nudging might be an option. Nudging is used as a method to influence people's behaviour without having to resort to either forbidding or ordering them to do something. It is therefore a subtle approach that can be used to make people do or refrain from doing certain things, e. g. using public transport instead of taxis on business trips. Being able to use one ticket for as many means of transport as possible at the destination is also highly relevant for 80 percent of the respondents.

5.2.2 "On-site offers and experiences"

More than 80 percent of respondents expect the availability of a social/accompanying programme (e.g. visiting companies, production sites, labs, historical or modern sights) for the majority of event types. The opportunity to connect with local businesses and research institutions at external types of events was rated by about 85 percent of respondents as a basic requirement or a reason for enthusiasm. Slightly more than half of the respondents would be delighted to be introduced to know new technologies and concepts in the context of new event formats. The absolute priority for the majority of respondents (approx. 90 percent) is to meet and network with like-minded people.

Participation in interactive activities, where people jointly discuss a topic, generates enthusiasm among about 50 percent of the respondents. However, in the case of trade fairs, this aspect is classified with the highest rate of indifference. For the less content-oriented offers and experiences, such as immersing in local life and history or nature experiences, it becomes clear across all types of events that rating such things as a basic requirement decreases. These service components are either mostly rated as inducing excitement/enthusiasm or are met with indifference. On the other hand, about half of the respondents are enthusiastic about their event attendance being able to have a positive impact on society.

5.2.3 "Other on-site factors"

Irrespective of the type of event, for around 60 percent of respondents, safety and hygiene concepts are an absolute basic requirement for attending in-person events.

For approx. 40 percent, easy orientation and accessibility in/of event venues is another basic requirement. For congresses, this figures is even higher, with more than 50 percent expecting this service component. With regard to sustainability, a quarter of respondents said that it is insignificant for them whether the event venue cares about sustainability or has a sustainability certification. However, 50 percent would be delighted about this.

5.2.4 Findings for different nationalities

Overall, the individual elements and service components are more frequently ranked in the enthusiasm or basic requirement classifications by respondents from North America than by respondents from other countries, who more frequently classify them as irrelevant. Respondents from the DACH region used the enthusiasm classification the least. Respondents from North America were particularly enthusiastic about being able to immerse themselves in the history of destinations (63 percent) and local life (53 percent) when at fairs and exhibitions in contrast to only 35 percent of respondents from the DACH region.

Less than half of the respondents from the DACH region (47 percent) get excited about the use of micromobility offers and unusual means of transport or consider them a basic requirement. This is different for respondents from North America, with almost 60 percent of respondents considering micromobility offers as a requirement or as something they would be delighted about. A similar picture emerges when it comes to contactless payment: This option is significantly more important for respondents from North America (74 percent) than for participants from the DACH region (55 percent).

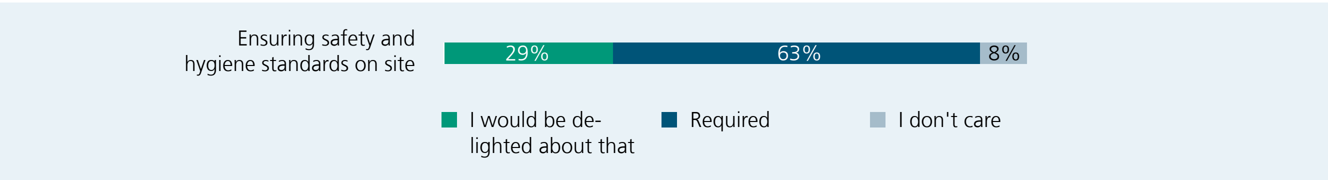

Fig. 9: Importance of ensuring safety and hygiene at in-person events.

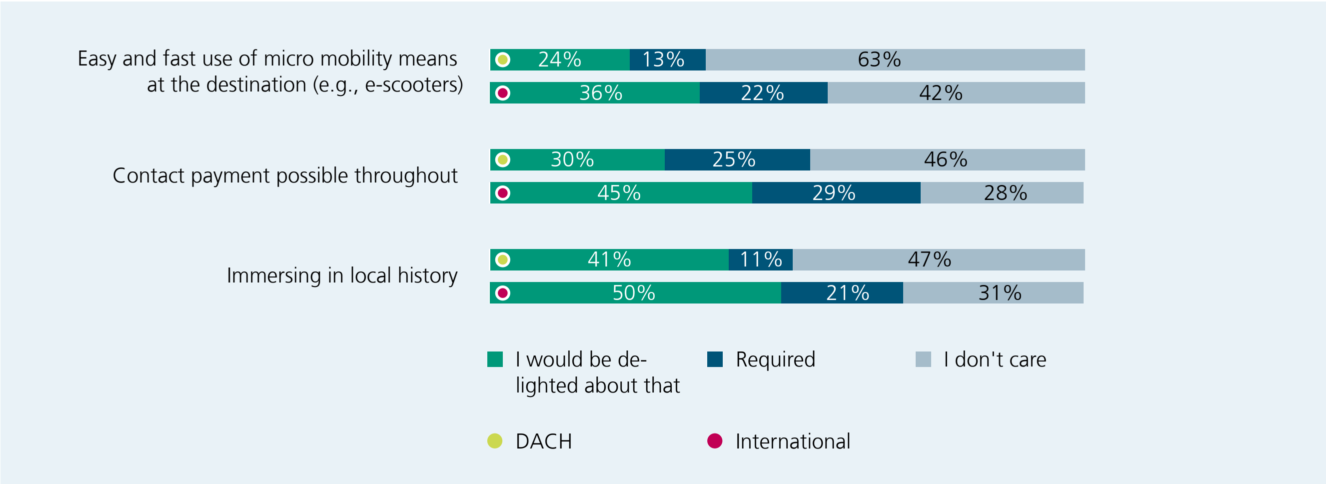

Fig. 10: Comparison of DACH region with rest of world with regard to the evaluation of other on-site factors.

5.2.5 Other findings and comparison of different groups

- **Micromobility**
  There are further differences between the various age groups: For example, 35 percent of 26–35-year-olds are enthusiastic about micromobility offers compared to only 18 percent in the 56-65 age group. Smaller differences can also be found between different genders: Men (21 percent) are more likely to require micromobility services than women (16 percent).

- **Experiencing local history, life and nature**
  With respect to immersing in local life and history, there is a smaller but nevertheless noteworthy difference between the different age groups. 48 percent of the 26–35-year-olds are enthusiastic about these aspects while the same applies to 43 percent of the older target groups These aspects are considered more irrelevant when attending congresses (approx. 41 percent of the mentions). Being able to have indepth nature experiences is equally important for both groups (37 percent).

- **Sustainable event organisation and use of climate-friendly means of travel**
  More than 45 percent of 26–35-year-olds are enthusiastic about events that consider sustainability and when climate-friendly means of travel are used. This is largely in line with the values of the older target groups. The proportion of respondents who are enthusiastic about this is as high as 50 percent at senior management levels. Sustainably organised events are met with enthusiasm by 51 percent of the respondents from North America and is thus higher than the value in the DACH region or in other European countries (45 percent). Climate-friendly means of travel were met with the lowest rate of enthusiasm in the category of project meetings (40 percent).

5.2.6 Summary of results

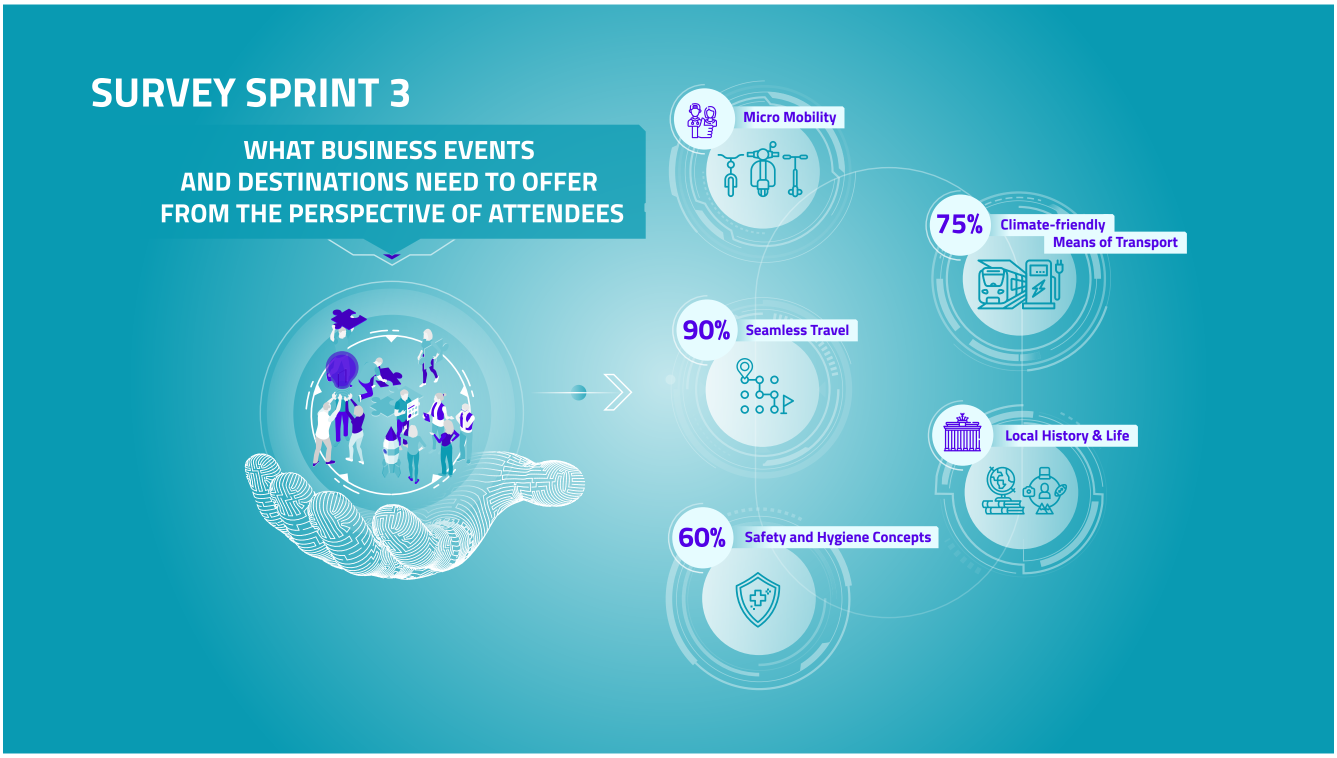

Fig. 11: Summary of what business events and destinations need to offer from the perspective of attendees.

Types of events that are preferably attended in person

Particularly events such as galas, celebrations of company anniversaries/receptions or business festivals are attended in person by 78 percent of respondents. In addition, the in-person attendance of trade fairs and exhibitions is popular with 76 percent of respondents. In contrast, project meetings and network meetings with several participating partner organisations (34 percent) and internal company events (31 percent) received higher values for online attendance.

Meeting and networking with like-minded people is a priority

For about 90 percent of the respondents, meeting/catching up and networking with like-minded people have absolute priority when it comes to on-site offers and experiences. The combination of the event itself with an accompanying programme of activities was highly rated across all types of events by over 80 percent. Participating in interactive activities in which people work together on a topic, is a source of enthusiasm for 50 percent of those surveyed.

Direct travel to event venue and easy use of transport at the destination matter

For 90 percent, and thus for the clear majority of respondents, an event venue that can be reached without changing trains, as well as easy and fast use of public transport, are a must. In addition, the use of as many means of transport as possible with only one ticket is also very relevant for about 80 percent of the respondents across all types of events.

Safety and hygiene standards as basic requirement

This is an requirement for 60 percent of the respondents. Half of the respondents is enthusiastic about event venues being concerned with sustainability including, ideally, a corresponding certification. Low priority is given to the possibility of contactless payment throughout. Respondents from the USA are most interested in that.

6. Recommendations and general results

The research and surveys conducted enabled us to collect data on which basis to gain comprehensive insights regarding the future of business events. These findings provide insights into the needs of business event attendees to ensure future-proof event organisation. They enabled us to develop specific recommendations for the events industry which we have divided into the categories sustainability, digitalisation, motivation, organisation and planning of event attendance, event programming, benefits and services. The service category is further subdivided into subcategories, i. e., offers, transport, infrastructure, staff and services.

In general, it is advisable for industry stakeholders to experiment with new possibilities when it comes to sustainability, to test alternatives and try unusual things in order to develop their offerings in a sustainable way. One example is the implementation of new, sustainable methods such as "vertical farming" in exhibition halls or on their roofs, in order to exploit unused space. Another possibility is to cooperate with local organisations and service providers, for example in catering, because adding value for local businesses can make a significant contribution to sustainability.

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6.1 In-person events and sustainability

To make events more sustainable, attendees could be appropriately incentivised and access to sustainable alternatives, such as for transport, could be made simpler. Using nudging techniques, sustainable options could be pointed out to attendees. Furthermore, it is advisable to include sustainability in the digital planning tools for business trips in order to simplify climate-friendly travel planning. In short, it is important to integrate sustainability into individual processes in such a way that it cannot be discounted with arguments about high costs or convenience.

Meeting ESG targets to achieve climate neutrality is also becoming increasingly important, especially in order to be able to continue to operate as a supplier in the industry in the future. For this, Science Based Targets (SBT) can provide guidance. Via the SBT standards, organisations commit to implementing ESG targets by 2025. This can also be used for external communication and promotion to potential clients. The length of stay in business event destinations is also a sustainability factor, as days can be added for workcations or visiting business partners and clients.

6.2 In-person events and digitalisation

Expanding on digital infrastructures and integrating digital tools throughout all processes in the events industry is crucial for the market's successful transformation. In event planning and organisation, a wideranging introduction of digital tools as enablers for all related processes enhances speed and efficiency. Digital tools ca be used to provide comprehensive information for simple routing that considers accessibility, both at destinations and in event venues. In addition, digital offers can be integrated throughout the entire customer journey to ensure smooth processes, such as contactless check-in and check-out at events and in hotels.

We also recommend building platforms for the selection and evaluation of recurring events to make choosing event easier. Open data can be a basis for the development of such platforms and digital tools. the German National Tourist Board (GNTB) and the GCB have, for example, initiated an Open Data Project to that end.

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6.3 Motivation for attending in-person events

The motivation of employees to attend events in person can be significantly increased when considering a number of favourable factors. This includes that event attendance should not lead to a higher workload when returning to the office. To avoid this, workloads could be adjusted and time for training could be allocated. Employees could also be offered the option of workcations. This not only increases employer attractiveness but employees can also use the time for their ongoing personal development and thus bring new experiences into the company.

Employees that immerse into the culture and working style of other countries can also be an asset when cooperating with international partners and clients. Particularly attending internal company events can be used to motivate employees to get out of a working from home scenario and to create additional opportunities for face-to-face interaction. Being able to make their own decisions about attending events and going on business trips increases motivation and empowers employees and can, in turn, significantly contribute to being more inspired and generate new ideas. As simple as possible approval and booking processes are essential for this.

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6.4 Easier organisation and planning of business trips and travel to events

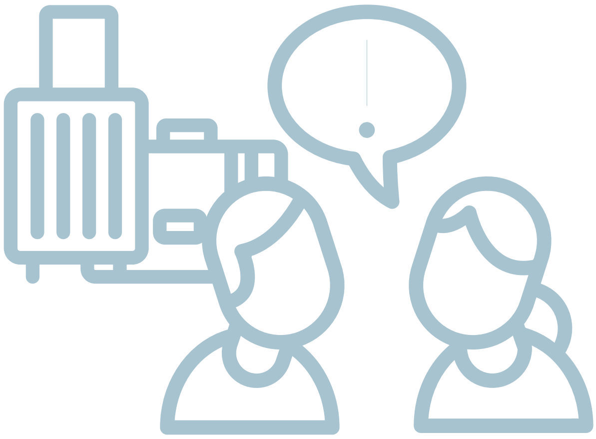
A culture of trust and proactive behaviour in companies contributes to a more self-determined planning of business and event trips. To enable this, employees could be allocated an event quota, according to which they can decide for themselves which events they attend. Thus, specific travel and event budgets can be defined for free disposal. It is also important to take the employees' personal situation into account when deciding on their attending events. In addition, it is advisable to allow employees to stay longer at the given business event destination through mobile working arrangements, so that they can work remotely before and after the respective event and use the time for workcations.

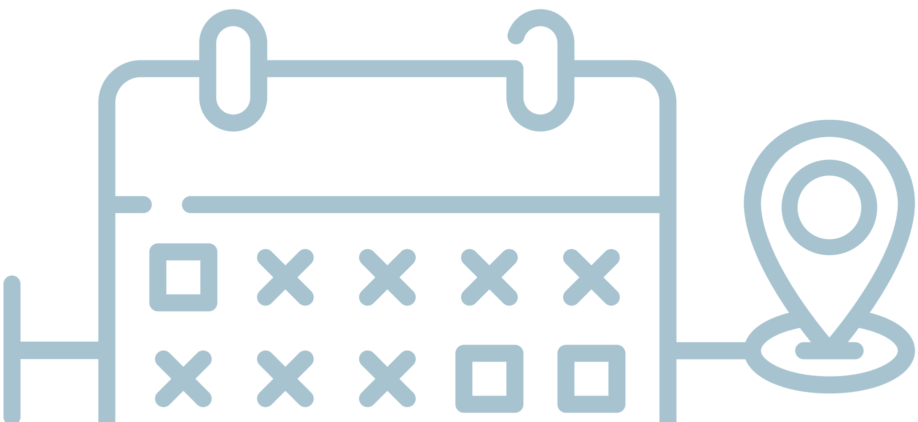
Organising business trips and attending business events should be considerably simplified for employees to ensure a smooth process both before and after the trip. Planning and going on business trips and attend events as well as the expense process after should be facilitated in such a way that employees look forward to it and are potentially even incentivised. In general, business trips should be as pleasant and uncomplicated as possible. The use of digital tools could increase the level of motivation.

Efficient and smooth travel arrangements can reduce stress and should therefore be considered as a high priority in the entire customer journey of a business trip. Hygiene standards and the creation of a sense of security should also be given special attention as basic elements in the management of event and business travel.

6.5 In-person event programming

When redesigning event formats, it is important to dedicate time to experimenting with new modules, tools or concepts. Gaining experience rather than implementing everything perfectly is key. Existing event formats can be reworked and adapted to modernise them and align them better with target groups. When designing events, creating spaces and opportunities for personal interaction and networking are key to fulfil attendees' respective requirements. At the same time, a balanced offer between networking and topic-related content is important. In addition, attendees should be offered a visible added value, for example, by enabling linking up with the local business and research community.

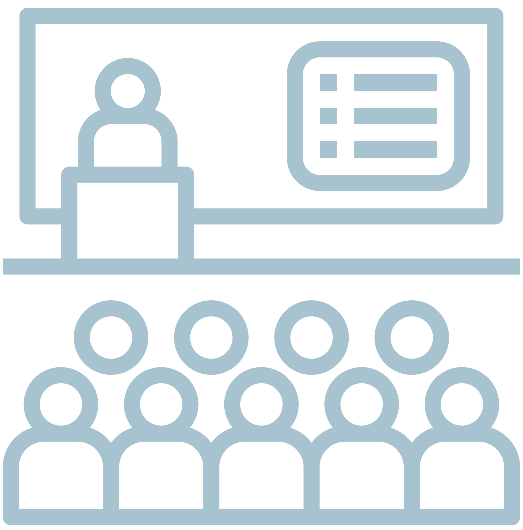




6.6 Long-term benefits of in-person events

In the future, cost-benefit considerations will continue to play an important role in the decision for or against attending in-person events. First, the different effects of online or physical events are weighed and evaluated. Based on every person's individual goals, a decision is then made as to whether in-person event attendance actually makes sense from both the perspective of the employee and their employer. Therefore, future events should be predominantly content-driven and offer a clearly defined added value for the daily professional life of the respective target groups. Efficient event design is crucial here, as offering events just for the sake of it is no longer in keeping with the times. For future in-person events, we see a clear principle apply; that of "quality instead of quantity". Less time spent at in-person events in the future also means higher expectations. In addition to the cost-benefit consideration, it should also be noted that attending in-person events can serve to increase staff loyalty, be a platform for face-to-face interaction as well as a source of inspiration.

Especially with regard to internal company events, their human aspects of interacting with others, bonding and finding inspiration should be considered by HR departments and used accordingly. In addition, internal events can be organised as a means of networking within teams, team building and boosting the team spirit to motivate people to go to the office as opposed to working from home.



Even though events can be seen as a source of inspiration, this should not be seen as the only reason for attending. Employees should be able to decide more deliberately and autonomously which events are beneficial for them. To that end, success factors should be defined. When considering costs and benefits, it is important for companies to consider long-term effects, such as positive effects of events that are not immediately measurable and obvious. Instead of sending several employees to the same event, exchanging know-how after can enhance the efficiency of trips undertaken to attend events. Companies could implement processes that enable event attendees to pass on their newly acquired knowledge to their teams and colleagues after the event. Employees should be able to extend their stay at the respective event destination, e. g., for customer visits and further networking.

6.7 Services from the perspective of event industry suppliers

While the previous recommendations focused on the perspective of in-person event attendees, the following section is dedicated to suppliers in the industry that offer event services. When we talk about "clients" in this context, we therefore mean companies or organisations that turn to these suppliers for the organisation of events.

6.7.1 Offers

Whatever in-person events offer in the future needs to be flexible in order to enable easy adaption to attendee requirements. Clearly defined target groups support the development of appropriate offerings. Suppliers need to be in close conversation with clients and their potential event attendees to better tailor their future client offerings. Challenges and to-dos should be identified. In addition, tighter budgets should be considered by providing low-budget event options. Also, in our fast-moving times, standardising processes helps to work with shorter lead times.

Furthermore, we recommend offering event know-how as a service, because clients can then be advised on the optimal use of different spaces that are suitable for their types of events which also adds to the skills that can be provided. Therefore, portfolios should be expanded in order to offer clients more alternatives and to be able to personalise offerings. Destinations can combine specific local characteristics that make them exciting for attendees with the event programme and thus support the offered content.

6.7.2 Transport

Sufficient micromobility means of transport, such as e-scooters, should be made available in the immediate vicinity of event venues. This is particularly relevant for international event attendees and younger target groups. In addition, it should be ensured that the use of transport is uncomplicated, inexpensive and attractive. Specifically, use of different means of transport should be enabled with one single public transport ticket.

6.7.3 Infrastructure

Simple guidance and routing along the entire customer journey is essential. This applies to both destinations and event venues. Sufficient signage is key in particular. In addition, digital tools and guides lend themselves to clever use. Event venues need to offer space to work and co-working spaces as well as WIFI throughout to enable mobile working.

6.7.4 Staff

In order to counteract the staff and skilled labour shortage, appropriate incentives to attract qualified staff are needed. Otherwise, the quality of the service, i. e. the organisation and running of in-person events, will suffer. Incentives can apply to different parts of jobs: Showing appreciation or introducing flexible working, for example, as measures that enhance trust can be beneficial. Flexible work patterns are particularly important for Generation Z. Being flexible with regard to payment and working hours can also increase employer attractiveness. This includes flexitime compensation, social benefits as indirect payment or the possibility to work per season. These measures go hand in hand with sensible automation and digitalisation of processes to create more freedom for creative work.

6.7.5 Services

In order to align services with client needs, suppliers could consider different approaches. Event venues, for example, should no longer limit themselves to just renting out space, but include their event know-how as a service in their portfolio. In addition, clients could be offered a pool of local services that is not only limited to local event suppliers but also links up with other local industries and provides an overview of local businesses so that clients get new contacts.

Furthermore, smooth communication with external service providers, for example in the hotel and catering industry, is indispensable for organising events to the satisfaction of clients. We recommend developing and standardising processes together with external service providers to enable a seamless experience. Digital tools such as contactless check-in and check-out can be used for this purpose. Event service suppliers should also focus on minimising the impact of staff shortages on event attendees. They could also consider offering services that would otherwise be provided by external service providers to avoid dependencies. The focus should always be on the clients and their different requirements along the customer journey.

6.8 Summary of recommendations

- Events are important for networking, as a source of inspiration and for staff retention, which is why they should be used deliberately and offer excellent content.
- Event attendance should ideally not lead to an increased workload and be compatible with employees' personal situation.
- Allocating event quotas with corresponding budgets for employees to dispose of freely creates a culture of trust.
- Workcations can increase employee satisfaction. They also enable meeting current and future business partners and clients which can contribute to the sustainability aspect.
- Sustainability considerations should be a part of as many areas as possible that are related to business events and travel, using standardised processes and digital tools.
- New concepts for business events should be adapted more quickly. This could be supported by focusing on the experimentation phase of events, which is all about learning instead of achieving instant perfect solutions.
- Standardising processes allows for work to be done with shorter lead times.
- Hygiene standards and creating a sense of security should be considered as an absolute basic requirement for any business trip and event attendance.
- Events must offer sufficient space for networking and working, with a focus on the provision of co-working spaces and stable internet connections.
- Attending events in the future will be about "quality instead of quantity" which is why events need to have very clearly defined topics.
- Extended service portfolios enable better and faster adaptation to the requirements and wishes of clients and their potential event attendees.
- Event-related transport should be as simple and inexpensive as possible, with a focus on micromobility offerings.
- Stakeholders in all areas should ensure that the service components that were classified as basic requirements in our research are implemented thoroughly. All other aspects can either be omitted or should be particularly inspiring, depending on the classification.

Fig. 12: Service components that have not been classified as basic requirements should either be left out or be exceptionally good.

7. Summary and outlook

Our 2022 research looked at the future travel behaviour of event attendees, with the core research question of why, in which form and how often will people attend physical events in the future and what added value will they gain from them. Based on that, we analysed the reasons for attending events in order to then identify what events and destinations need to deliver, which provided a base for developing tailormade offerings and formulating recommendations for different stakeholders/stakeholder groups.

Our most recent research phase, just like the previous third and fourth research phases, has been considerably impacted by the Covid-19 pandemic. In recent years, companies and employees have had to react flexibly to unpredictable consequences and in some cases completely reposition themselves. As never before, experiences with online events had an effect on the entire evens market, revealing a transformation of the market which is also influenced by our new flexible and mobile patterns of working.

Our fifth research phase, whose key findings are presented in this report, put a spotlight on what attendees expect from in-person events and what criteria must be ful-filled in the future so that people again attend in-person events more often. Due to the high number of respondents in all three surveys, we were able to gain insights into their expectations and criteria across cohorts. It is particularly important for us to provide new ideas and inspiration for concepts, event formats, event venues and the coming together of the worlds of online and physical events. While the pandemic might have fundamentally changed the events market, it also triggered the critical questioning of legacy patterns in order to look boldly into the future and try new experimental ideas.

Together with the Fraunhofer Institute for Industrial Engineering IAO, the GCB German Convention Bureau e.V. will continue to address the challenges of the ongoing industry transformation, with more "Future Meeting Space" research in 2023.

Business events are true multitalents as platforms for knowledge exchange and networking. But at a time when we are facing a multitude of global challenges and crises, meetings, conferences and congresses also need to change. What solutions can business events offer in the context of climate change, pandemics, international conflicts or energy issues? And vice versa: How does this multicrisis situation influence the running of events and the strategies and concepts applied to them? Under the headline "Navigating Business Events in Challenging Times", the "Future Meeting Space" innovation network will look at these questions in its sixth research phase in 2023.

We will concentrate on the role of business events in times of crisis and the development of event typologies. Special attention will be paid to business events as means of promoting social participation, as social spaces, as places where people learn from each other and where they come together, as places where people share experiences, as a way of overcoming crises together, as tools that support transformation processes and above all as a necessity and not as a luxury.

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