MEMBER SURVEY 2026

Insights | Benchmarks | Analysis

AIPC

Table of Contents

Introduction

This report provides the findings and insights from the 2026 edition of the annual AIPC Member Survey Report. This on-going analysis identifies and tracks multi-year trends impacting the convention centre industry around the world. The report focuses on the following areas:

- **Attendance and bookings growth estimates**
- **New business strategies, revenue streams, & innovations**
- **How clients are changing**
- **Sales and marketing strategies**
- **Venue infrastructure and technology investments**
- **Sustainability trends**
- **Staff recruitment, training, and retention strategies**
- **Members' industry outlook with a focus on challenges and opportunities**

The study has been conducted by AIPC in collaboration with Michael Hughes, Managing Director of Research & Consulting with Access Intelligence. AIPC conducted the survey of members around the world in the first half of 2026. The survey received responses from 67 member venues.

It is important to note that even though the total number of responses in some regions is small the survey data has high validity. A small number of responses in certain regions equates to a high proportion of AIPC members in each of the major regions of the world.

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

Access Intelligence
Experience Starts Here

Executive Summary

One of the key themes in the previous AIPC Member Survey conducted in 2025 was “uncertainty,” and specifically how geopolitical issues, inflation and economic trends would continue to impact the venue and events industry. Not surprisingly, the same theme of uncertainty has carried over to this year’s survey and the sentiment of many in the membership seems to be even more uncertain in 2026. An AIPC member spoke for many other centres by noting their team is challenged by *“an ever changing business landscape with many issues, including geopolitical issues, a new generation of planners, budgetary restrictions, supply chain issues, and visa requirements.”*

One important area where there is more certainty among the members is that top event management and meeting planner clients continue to change as many of these groups are under similar pressure from inflation, economic fluctuations, air travel issues, and the impact of technology. An AIPC member noted in their survey response about how clients are changing: *“Over the past few years, we have seen lower attendance levels compared to previous years, as many clients are being more selective with travel and event participation due to budget pressures and changing working patterns. Clients are also placing greater focus on service offerings and overall value, expecting more tailored experiences, flexibility, and measurable ROI from events. There is a stronger emphasis on quality, attendee engagement, and added-value services rather than simply hosting large-scale events.”*

The good news is there are many important growth opportunities for venue management teams, and these teams are not sitting still during this challenging period. Some of the growth opportunities, based on member comments and findings, include:

- New business and pricing models
- Ability to add new revenue streams and innovations often driven by technology
- Technology investments and leveraging AI and other software
- Expanding into new and growing event segments such as entertainment, sports, technology, finance and medical
- Partnerships and collaborations
- New venue renovations, expansions and related investments
- Adding and leveraging supporting assets like HQ hotels and better connections to municipal transportation links
- Increasing sales and marketing activity, industry outreach events, and client engagement
- Enhancing the client experience through flexibility, customization, and responsiveness
- Local and regional market development

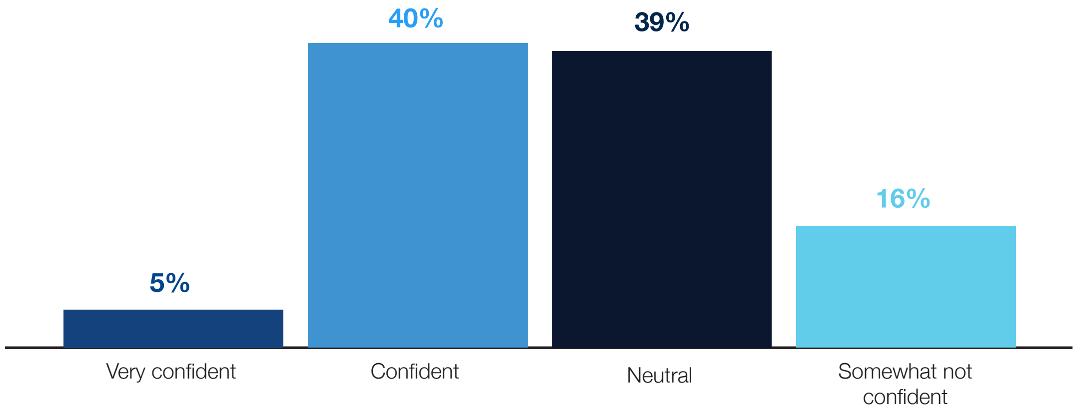
It’s also important to note that many AIPC members are handling these challenges well by implementing a mix of important recent and on-going investment programs, strong destination appeal, high quality staff, strong CVB/DMO relationships and other partnerships, and by serving top event and group segments in growing segments of the economy. Also, importantly, many members are instituting both strategic and tactical management and operational approaches to better attract and serve clients and their audiences and exhibitors. The inherent, underlying value of events and meetings is also driving positive sentiment and business results. A few of the key insights from the new survey are provided in this Executive Summary.

INSIGHT #1

Forty-five percent of members are very confident or confident the event industry will grow over the next few years, but a large segment have a neutral outlook

Nearly half of AIPC members are either very confident or confident about the industry growth outlook. But with uncertain economic trends in many regions, 39% of members noted their industry outlook for the next few years is neutral. This sentiment data is a little concerning. Basically half of the membership has a positive outlook while the rest see uncertainly or some weakness. The positive sentiment, according to members, is based on the inherent strength of events and their importance to associations and corporations as well as attendee bases of professionals and businesspeople around the world. The neutral or negative outlook sentiments are primarily due to geopolitical issues, inflation, and weakness in certain sectors of the global or regional economies. In short, as a number of the findings in the report show, some member venue businesses are doing well while others are more challenged.

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



These two member comment illustrate the split in the industry:

"The biggest challenges today include a shortage of qualified staff in the MICE segment and continuously rising operational costs, particularly in energy, services, and suppliers. At the same time, there is increasing pressure to meet sustainability and ESG standards while delivering large-scale events. We also face strong competition from other European congress destinations, as well as the need to adapt to clients' expectations for greater flexibility in long-term event planning." – AIPC Member

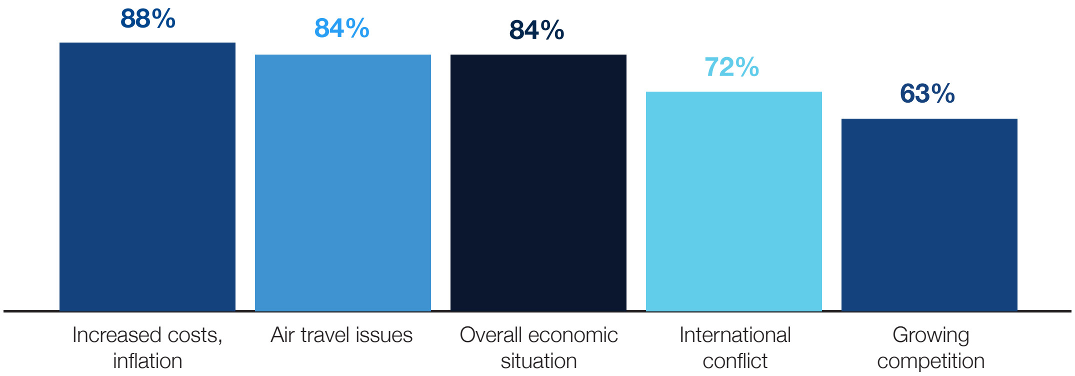
"Some of the biggest opportunities to increase our overall events business include continued investment in upgrading and modernizing the centre to meet evolving client expectations. Enhancing our service offerings, particularly AV and event technology capabilities, is also a key opportunity, as clients increasingly expect high-quality hybrid and fully integrated event experiences. By improving the overall customer experience and offering more flexible, technology-driven solutions, we can attract a wider range of events and remain competitive within the market." – AIPC Member

INSIGHT #2

Members are concerned about inflation, air travel issues, and uncertain economic growth prospects impacting their core business

The survey asked members what they consider to be the biggest risks to their business performance. The big three issues are rising costs/inflation, air travel issues impacting attendance, and the overall economic situation which is mixed in many regions of the world. International conflict and increasing competition are other top concerns.

Top Risks to Centre Business Growth – All Members Worldwide

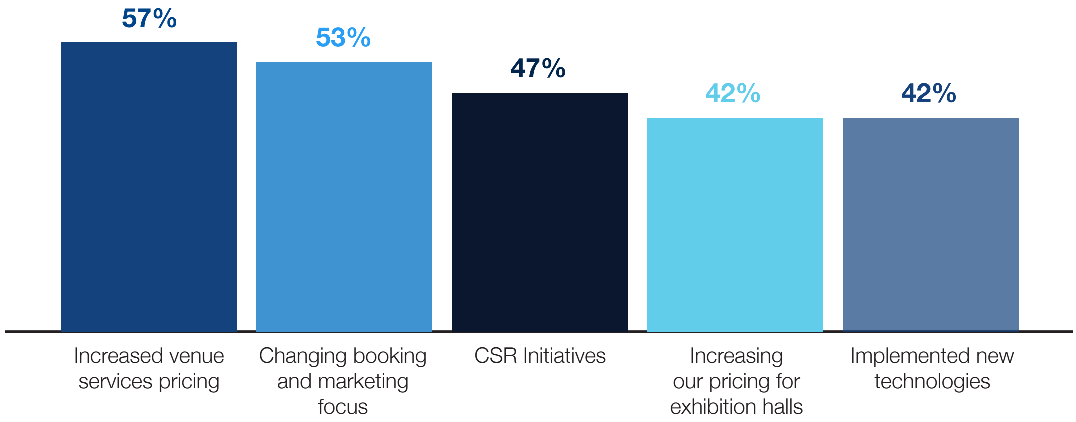


INSIGHT #3

Many member teams have been implementing new business strategies and models as well as pricing reviews and partnerships

Over the past year, over half of members worldwide have increased venue services pricing besides exhibition hall space and changed their bookings and marketing focus. Many venue teams are reviewing their strategies, pricing and target markets annually, along with implementing CSR-ESG initiatives, changing core exhibit hall/ event space pricing, and managing important technology programs. Most members are not sitting still in the face of uncertainty.

Primary New Business Strategies and Models – All Members Worldwide



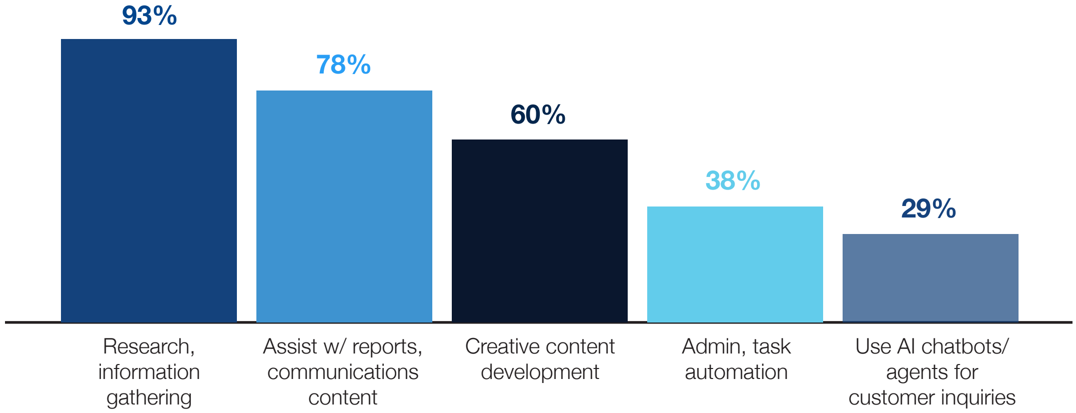
"Notwithstanding global volatility and potential slower economic growth, there is still healthy appetite for organizations to bring people together. Events are seen as a very important channel to accelerate trust and business goals in a very digital world." – AIPC Member

INSIGHT #4

Artificial Intelligence usage is still mainly research and information based, but many centre teams are also using AI to assist with creative concepting and some task automation and communications

Nearly all venue teams are using AI for research and information gathering. The other top uses are to assist with information and data for reports and other content, and also to assist with creative content development. It's still early in the AI revolution and most of the impact is likely to be seen within venue management and operational software platforms.

How Members are Using AI – All Members Worldwide

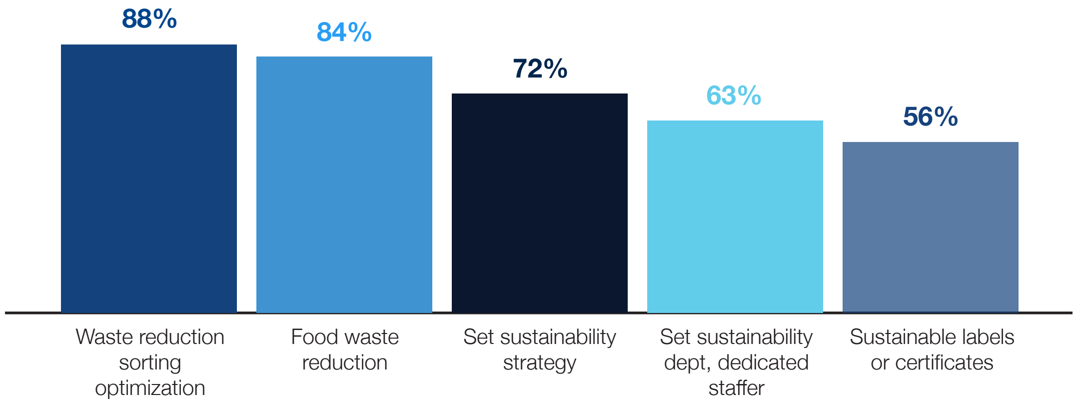


INSIGHT #5

Sustainability initiatives are mostly focused on waste reduction
and setting or changing strategies, teams and approaches

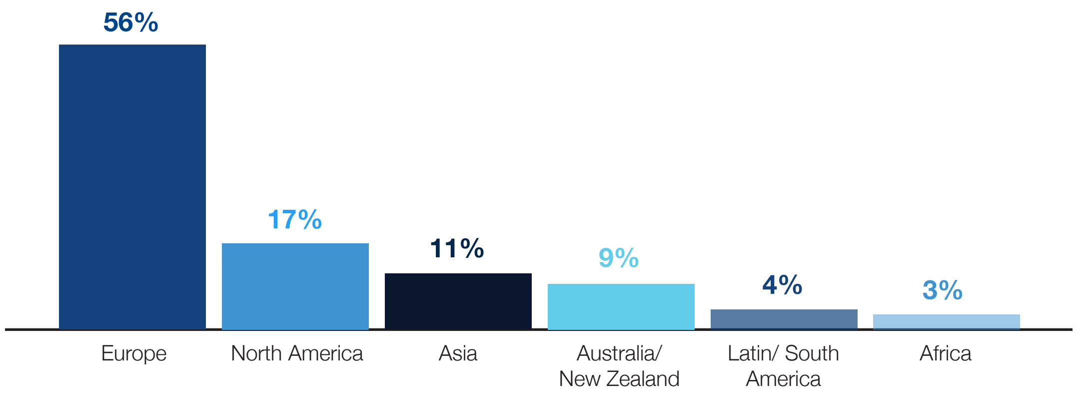
The survey question was: what sustainable measures and actions have you put in place? A high percentage of members are focused on waste reduction and sorting optimization (88%) and food waste reduction (84%). Nearly three out of four members have a specific sustainability strategy in place, and over half have a dedicated staffer or team working on these issues and/or have a focus on obtaining sustainable labels or certifications.

Top Sustainability Measures and Actions – All Members Worldwide



Member Survey Response by Region

The largest segment of survey respondents are European members (56%), followed by North American (17%) and Asian (11%) members.



I. Industry Performance and Outlook

This first section provides estimated attendance and event bookings growth in 2025 with an outlook for 2026. New in this year's survey is the addition of member comments on the reasons for their industry growth confidence outlook, or concerns. Risks to growth are also included in this section.

Attendance Growth in 2025 Over 2024

Survey Question: By what percentage did your facility's total number of event attendees and delegates in 2025 change compared to 2024?

Attendance growth was strong in 2025 at 7% according to the average of all reporting by AIPC members in the survey. Europe was particularly strong with over 10% estimated average attendance growth.

Worldwide	Europe	North America	Asia	Australia/NZ
7.0%	10.7%	3.1%	-9.6%	6.8%

Expected Attendance Growth in 2026

Survey Question: What is your forecast for 2026 for total attendance level growth compared to 2025 on a percentage growth basis?

The worldwide average expected total attendance growth rate for 2026 is 1.2%, and members in Asia are expecting the strongest growth.

Worldwide	Europe	North America	Asia	Australia/NZ
1.2%	2.5%	-1.6%	4.7%	-9.0%

Event and Group Bookings 2025 Over 2024

Survey Question: By what percentage did your facility's total number of event and group bookings in 2025 change compared to 2024?

Total event and group bookings worldwide were basically flat in 2025. Although European members, on average, experienced over 4% bookings growth last year.

Worldwide	Europe	North America	Asia	Australia/NZ
-0.4%	4.3%	-3.9%	-12.8%	-3.2%

Expected Event and Group Bookings Growth in 2026

Survey Question: What is your forecast for 2026 for total event and group bookings growth compared to 2025 on a percentage growth basis?

Total event and meeting bookings are expected to increase by a modest 1.3% in 2026. It's important to note that these bookings and attendance figures are averages and estimates, especially the attendance numbers. These should be viewed as sentiment gauges more than actual performance data sets, although the previous year's total event and meeting bookings statistics should be quite accurate.

Worldwide	Europe	North America	Asia	Australia/NZ
1.3%	2.0%	-1.1%	5.7%	-4.5%

Strength of Economic Activity and Business Growth in Region

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

The bulk of the members (63%) say the economic growth in their regions is moderate. But only 6% of members say it's strong, while a total of 31% say it's weak/flat/negative.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Strong growth/activity	6%	6%	20%	0%	0%
Moderate	63%	64%	50%	78%	50%
Weak	19%	17%	20%	22%	50%
Very weak, flat to no growth	10%	10%	10%	0%	0%
Negative growth, recession	2%	3%	0%	0%	0%

Members' Confidence in the Event and Meeting Industry's Five-Year Growth Outlook

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

Looking out to the next three to five years there are essentially two groups of members. One group (45% of the respondents) is confident the industry will grow and be "healthy," while the rest are neutral to not so confident. Many comments below describe members' industry outlook. Key positive themes include the inherent value of events to associations and corporations, recent or current venue investments and upgrades, and destination appeal. A number of the neutral to negative sentiments focus on geopolitical issues and risks (and the wars in particular), inflation, air travel concerns, weak economic growth, and the unknown impact of technology.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Very confident (strong growth outlook)	5%	6%	0%	0%	25%
Confident (healthy moderate growth)	40%	46%	50%	11%	25%
Neutral (flat growth)	39%	31%	20%	89%	25%
Somewhat not confident (no growth and some challenges)	15%	17%	30%	0%	0%
Not at all confident (expect challenges, decline)	1%	0%	0%	0%	25%

Member Comments on Their Industry Growth Confidence Level

Survey Question: What are the reasons for this confidence level?

Member Comments with Confident Industry Growth Outlook

"At this time the forward bookings are looking strong, however it will all be dependent what happens with the war in the Middle East."

"Current political and economic context."

"Despite a slight post-pandemic market share decline, business events remain the most lucrative tourism segment, and growing international demand, reinforced notably by favorable geopolitical conditions redirecting American conventions to Canadian cities, points to steady growth ahead."

"Expanded convention campus and additional hotel room inventory."

"Face-to-face meetings are increasingly important to learn from trusted industry sources since there is so much fake news and misinformation due to AI generated content online."

"Forecast and space utilization, and communication with customers."

"Geopolitical landscape is not impacting on us at the moment."

"I base this on the fact that we have been growing in a sustainable way, and the business is now consolidated."

"Improving perception of our city as a safe and appealing destination, investment we are planning for our venues."

"It follows an upward trend."

"Major events remain strong."

"Notwithstanding global volatility and potential slower economic growth, there is still healthy appetite for organizations to bring people together. Events are still seen as a very important channel to accelerate trust and business goals in a very digital world."

"Our bookings for the future."

"Regional economic growth expectation."

•Steady development of our national economy, general stabile requests for congresses and meetings."

"Strong demand from various segments. Caution applies from geopolitical situation with both risks and opportunities."

"Our city continues to be a major hub for large-scale corporate gatherings."

Member Comments with Neutral Industry Growth Outlook

- "As IT technology continues to advance, the MICE industry is expected to experience both positive and negative impacts. Therefore, no significant change, increase or decrease, is anticipated."
- "Changing government this year, the expense levels are lower, airlines closing."
- "General economic uncertainty. Expenses are rising higher than revenue growth. Political unrest. Changing booking patterns."
- "Geopolitical insecurities."
- "Geopolitical situation."
- "Geopolitical uncertainty, which continues to impact international travel, delegate attendance, and overall event viability. Client budgetary constraints, with many organizations reducing spend or scaling down event scope. A noticeable decline in event volumes, indicating softer demand in certain segments. Increased competition within the market, placing pressure on pricing, availability, and conversion rates. Government cost-containment measures, which are limiting public sector events and associated spend."
- "Geopolitics and government policy."
- "Global conflict."
- "Global instability due to geopolitics."
- "I am confident in our national market. The international market remains uncertain, but it also offers potential opportunities."
- "I'm neutral about the industry outlook over the next three to five years. In the current economic climate, clients are becoming more cautious with budgets and spending, which is leading to tighter event budgets and slower decision-making. While there is still strong demand for events and face-to-face engagement, businesses are being more selective and focused on demonstrating clear value and ROI. Overall, I see the industry as stable, but with moderate growth due to ongoing economic uncertainty."
- "I'm unsure whether healthy, moderate growth can be achieved alongside the current geopolitical environment. Also, is there room in the market for new innovative events?"
- "Impact of inflation and Middle East."
- "Political instability."
- "Steady economic growth."
- "The industry is expected to see steady but limited growth due to recovering demand for events, offset by economic uncertainty, cost pressures, and strong competition among venues."
- "There is a lot of uncertainty, and it is difficult to predict anything."
- "Waiting to see how the global war situation evolves and, in particular, what position the United States will take, as this could have a significant impact on our industry."
- "We currently have longer periods of little business alternating with longer periods of very busy business."
- "We were more optimistic earlier in the year. However, with the recent conflict in the Middle East and the uncertainty it may bring to travel costs, delegate movement, and event planning, we now take a more neutral view of the industry outlook."

Member Comments with Negative Industry Growth Outlook

> "Current geopolitical situation."

> "Economic issues surrounding geopolitical issues/war."

> "Extremely weak economic situation, war, very high inflation, uncertainty, extremely weak political leaders all over Europe."

> "Geopolitics will make access and air traffic harder, not to mention visa issues. I see events regionalizing a little more in the short term."

> "If we continue to be confronted with crises and wars, the economy will continue to weaken. If stable and business-friendly governments are not formed quickly in Europe, things will also continue to decline."

> "The geopolitical context and the cost of living."

> "The Iran conflict, on top of other geopolitical hotspots, has recently reshuffled the cards. Bombings in Dubai, Doha, Abu Dhabi do not entice high confidence as we speak, and it seems that this conflict may last; thus affecting world economies while driving inflation."

> "Trump, America, and war."

> "Wars in Ukraine and Iran."

Risks to Centre Business Growth

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

The biggest growth risks are all factors outside of the control of the industry – inflation, air travel issues, the health of the economy, and international conflict. Secondary but still important and long-term issues are increasing competition and hotel capacity and pricing.

Worldwide	Important	Neutral	Not Important
Increased costs/inflation for venue management and operational services and equipment	88%	12%	0%
Air travel issues (pricing, availability, airlift, route access, etc.)	84%	10%	5%
Overall economic strength/weakness	84%	16%	0%
International conflict	72%	21%	7%
Growing competition from other centres / regions	63%	34%	4%
Hotel availability and pricing	60%	31%	9%
Increased costs specifically for technology-related investments (either internal or client/user-facing)	59%	38%	4%
Low attendance especially from non-local attendees	57%	32%	11%
Government / corporate restrictions on meetings	55%	27%	18%
Subvention and government funding to secure events	53%	40%	7%
Low demand from traditional event clients and groups	46%	39%	16%
Changing government priorities	46%	38%	16%
Sustainability, environmental concerns	43%	39%	18%
Reduced event and marketing spends/reduced operating days or footprint	43%	43%	14%
Cyber security risk	40%	44%	16%
Event and group re-booking, re-scheduling challenges	36%	48%	16%
Reputational issues	33%	36%	31%
Immigration or visa requirements limiting access	29%	38%	34%
Smaller sized local events	29%	39%	32%
Legal issues with clients, major disagreements and/or negotiations	11%	46%	44%
Replacement of events with online alternatives	11%	39%	51%
Increases of corporations and individuals using digital media and communications	9%	66%	25%
Other	13%	66%	22%

The top risks to members in a few of the major regions of the world are broken out below.

Top Risks to European Members
- Increased costs/inflation for venue management and operational services and equipment: 87%
- Air travel issues (pricing, availability, airlift, route access, etc.): 81%
- Overall economic strength/weakness: 79%
- Hotel availability and pricing: 72%
- International conflict: 68%

Top Risks to North American Members
- Increased costs/inflation for venue management and operational services and equipment: 100%
- Air travel issues (pricing, availability, airlift, route access, etc.): 90%
- Increased costs specifically for technology-related investments (either internal or client/user-facing): 80%
- Overall economic strength/weakness: 80%
- International conflict: 70%

Top Risks to Asian Members
- Overall economic strength/weakness: 100%
- International conflict: 88%
- Air travel issues (pricing, availability, airlift, route access, etc.): 88%
- Changing government priorities: 88%
- Growing competition from other centres/regions: 75%

Top Risks to Australia/New Zealand Members
- Low attendance especially from non-local attendees: 100%
- Increased costs/inflation for venue management and operational services and equipment: 100%
- Increased costs specifically for technology-related investments (either internal or client/user-facing): 100%
- International conflict: 100%
- Air travel issues (pricing, availability, airlift, route access, etc.): 100%
- Government / corporate restrictions on meetings: 100%
- Growing competition from other centres/regions: 100%
- Overall economic strength/weakness: 100%
- Subvention and government funding to secure events: 100%

II. New Business Strategies, Revenue Streams & Innovations

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

New Business Strategies

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

Over half of members worldwide have recently increased their venue services pricing besides exhibition hall space fees and also changed their bookings and marketing focus. North American members in particular have been reviewing their pricing structures.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Increased other venue services pricing	57%	48%	80%	67%	75%
Changed our bookings and marketing focus, orientation to certain types of events or groups	53%	39%	90%	56%	50%
Improved Corporate Social Responsibility (CSR) initiatives	47%	39%	10%	67%	100%
Increased our pricing for exhibition halls and major event spaces	42%	36%	50%	33%	75%
Implemented new technologies	42%	33%	50%	67%	50%
Partnered with event producers to launch or co-own events, or cost/profit/risk share	38%	36%	30%	33%	25%
Other important partnership(s)	32%	36%	30%	11%	50%
Started to offer important new services or lines of business	30%	24%	20%	44%	25%
Changed the way we calculate pricing for exhibition halls and major event spaces (e.g., changed from per day to per event, or gross space vs. net, etc.)	27%	24%	20%	33%	0%
Changed venue name, logo or branding	13%	18%	10%	0%	25%
Changed formal relationship with CVB/DMO/city-regional destination marketing partner	13%	12%	30%	0%	0%
Changed critical services provider partner(s) such as F&B or telecommunications	7%	6%	10%	11%	0%

How Centre Management Success is Measured

Survey Question: Which of the following are important to you and your senior management team when measuring overall success?

The top five management success metrics are venue gross revenue, operational profit/loss, venue activity impact on regional economic development, estimated overall economic impact from event and client activity, and energy efficiency and sustainability efforts. The scope and power of convention centres is suggested by the sheer number of ways venue success can be measured

Worldwide	Important	Neutral	Not Important
Venue gross revenue	98%	2%	0%
Venue operational profit/loss	98%	2%	0%
Impact on economic development in our city and region	83%	17%	0%
Total economic impact	82%	16%	2%
Energy efficiency and sustainability	70%	28%	2%
Public relations, press coverage	58%	37%	5%
City and community service levels and impact	54%	42%	4%
Total number of events	50%	45%	5%
Total number of visitors	50%	48%	2%
Performance of our proprietary event business	48%	41%	11%
Limitation or reduction of operational revenue losses or payment from government owner entity	44%	29%	27%
Total number of hotel rooms booked	25%	39%	36%
Visitor-related tax revenues	21%	48%	30%
Hotel community occupancy levels	18%	47%	35%
Hotel community gross sales or profit	9%	41%	50%
Other	0%	70%	30%

Most Important Success Metrics to European Members
- Venue gross revenue: 97%
- Venue operational profit/loss: 97%
- Total economic impact: 85%
- Impact on economic development in our city and region: 79%
- Energy efficiency and sustainability: 68%

Most Important Success Metrics to North American Members
- Venue gross revenue: 100%
- Venue operational profit/loss: 100%
- Impact on economic development in our city and region: 100%
- Total economic impact: 90%
- City and community service levels and impact: 80%

Most Important Success Metrics to Asian Members
- Venue gross revenue: 100%
- Venue operational profit/loss: 100%
- Impact on economic development in our city and region: 75%
- Energy efficiency and sustainability: 75%
- Performance of our proprietary event business: 71%

Most Important Success Metrics to Australian/New Zealand Members
- Venue gross revenue: 100%
- Venue operational profit/loss: 100%
- Total economic impact: 100%
- Limitation or reduction of operational revenue losses or payment from gov. owner entity: 100%
- Impact on economic development in our city and region: 100%
- Energy efficiency and sustainability: 100%

Venue Management Cost Increases / Inflation

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

Over sixty percent of AIPC members are still experiencing meaningful inflation impacting their budgets and operations. Labor, energy and utilities are seeing some of the most inflation according to member comments in the survey. One member noted: “Costs largely plateaued in 2024, although we anticipate some upward pressure moving forward.” Another member wrote: “Rising utility costs, driven in part by increases in oil prices, are placing additional pressure on operational expenses. This has had a knock-on effect on other cost areas, particularly food and beverage, further impacting overall event affordability and client budgets.”

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	61%	59%	70%	67%	25%
No	39%	41%	30%	33%	75%

Members note where they are seeing the most inflation:

- Electricity and other utilities
- Energy
- F&B
- Labor
- Maintenance
- Security
- Technology, AV and business systems

New Revenue Sources

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

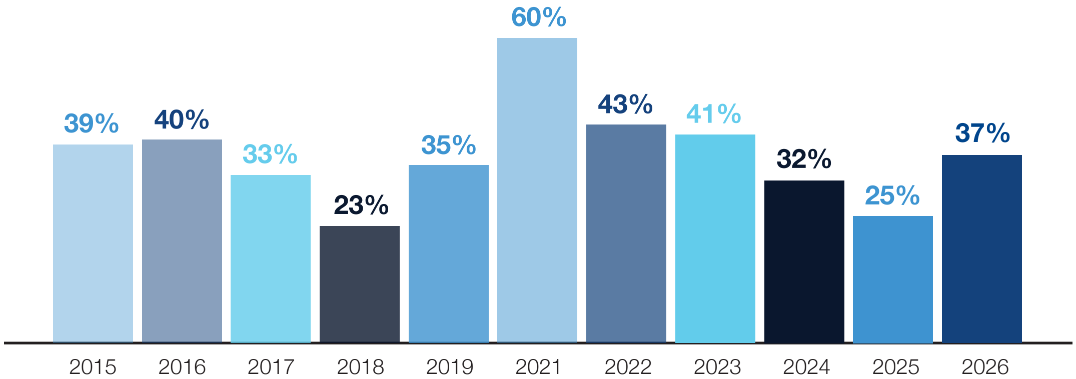
New revenue streams have been added by 37% of members worldwide and 44% of European members.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	37%	44%	40%	22%	25%
No	63%	56%	60%	78%	75%

New revenue streams most often mentioned in written responses include:

- AV services enhancements and partnerships
- Event ownership and promoting client/partner events
- Adding digital signs/screens
- Pricing and fee changes
- Building hotels and/or establishing accommodation partnerships
- Vendor partner changes and/or service revenue commission fee changes
- Hosting/serving major international sports and/or political events
- Selling sponsorships
- Enhanced event services
- Other partnerships

Multi-Year Trends: Centres that Added a New Revenue Stream 2015 to 2026



Innovation Areas

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

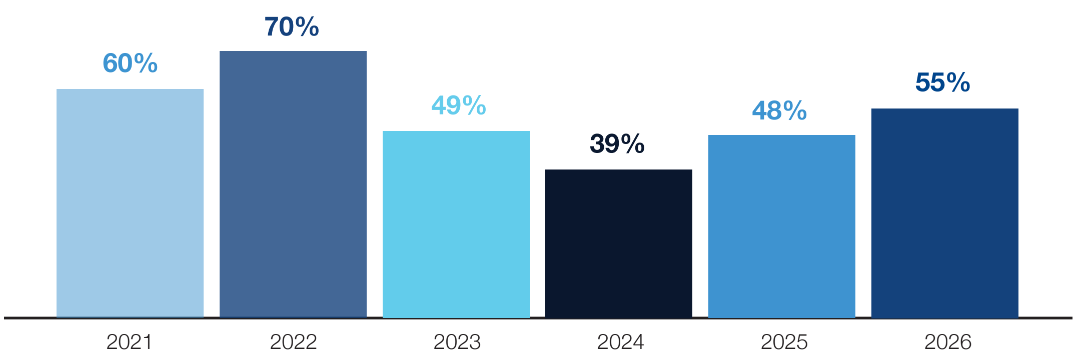
It's not surprising that most innovation is around technology and software platforms related to venue management, marketing and operations digitalization. As a member noted their focus is on "facility digital transformation initiatives."

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	55%	50%	50%	78%	75%
No	45%	50%	50%	22%	25%

Innovation areas being pursued by members include:

- CRM and marketing software
- Safety and security related
- Facility operations technology and streamlining
- Hall and room management systems
- New and enhanced services

Multi-Year Trends: Percentage of Members with New Innovations 2021 to 2026



Venue Pricing Changes

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

A small majority of members (53%) have changed their core pricing models recently and different approaches have been adopted. Twenty-three percent have established dynamic pricing while 25% have been offering more package pricing options to clients. Thirty-two percent of centres worldwide have adjusted their off-peak period pricing. By “dynamic pricing” we mean pricing models where exhibition space and other spaces or services are adjusted based on demand, timing, and inventory conditions rather than using one fixed rate. The goal is revenue optimization and usually price changes are informed by set rules or algorithms. It’s important to know that this definition of dynamic pricing was not provided in the survey, and that other names for this approach are “variable” and “market driven” pricing.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, we have adopted dynamic pricing	23%	12%	60%	33%	0%
Yes, we have introduced pricing packages	25%	27%	30%	22%	0%
Yes, we have adjusted our prices according to off-peak periods	32%	36%	40%	22%	25%
No, we’ve kept our traditional pricing structure	47%	55%	30%	22%	75%

III. Client Trends

This section provides data on the strongest client and group sectors as well as what members see as the biggest issues impacting key clients and how they are changing.

Strongest Client Segments

Survey Question: What types of events and groups do you think will provide the best opportunities for growth over the next one to two years? Select all that apply.

By a small percentage major corporate meetings are seen as the top client segment in terms of industry growth opportunity worldwide. Corporate events tend to thrive in times of strong economic growth, so it's interesting with a mixed economic outlook that corporate groups are expected to do well. This is likely influenced by the boom in technology and AI which is fueling interest in corporate events and meetings. One of AI's biggest impacts on the venue industry is from event coverage of this technology driving new event development and attendance. The outlook for association events is also strong according to the membership.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
National or International corporate meetings	75%	79%	60%	67%	100%
Association conferences and meetings	73%	67%	60%	89%	100%
Association conventions with exhibits	70%	61%	60%	89%	100%
Exhibitions, trade shows and trade fairs	42%	42%	30%	33%	75%
Entertainment events	38%	42%	40%	22%	75%
Governmental events and meetings	38%	21%	30%	78%	50%
Local corporate meetings	33%	21%	30%	56%	50%
Sporting events	28%	30%	50%	11%	25%
Government priority industries	27%	21%	10%	33%	50%
Consumer and public shows	13%	6%	10%	0%	75%
Incentives	8%	9%	0%	11%	25%
Other	8%	3%	10%	22%	25%

Venue Clients by Region (Local, Regional, National and International)

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

Worldwide just under one-third of venue client bases are locally-based groups, and 31% are national.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Local %	32%	24%	36%	45%	50%
Regional %	15%	15%	22%	12%	3%
National %	31%	29%	30%	30%	34%
International %	22%	32%	12%	13%	13%

Key Issues Important to Clients and Groups

Survey Question: Which of the following metrics and issues are important to your largest, most important event and group clients?

AIPC members see their key clients most focused on total attendance size and quality, event management costs and inflation, travel costs and the impact on attendance, and exhibitor/sponsor demand and ROI. Not surprisingly, hotel rates and attendee engagement are also key areas clients watch closely.

Worldwide	Important	Neutral	Not Important	Unsure
Total attendance/delegate counts and quality	90%	8%	2%	0%
Overall event management and/labor costs, inflation	85%	10%	2%	3%
Travel costs, airfares or air travel issues	78%	19%	2%	2%
Exhibitor/sponsor levels/demand	75%	18%	4%	4%
Exhibitor/sponsor ROI	75%	16%	4%	5%
Hotel room rate costs	68%	22%	7%	3%
Attendee engagement levels	61%	33%	0%	5%
Issues specific to their industries	57%	29%	5%	9%
Issues specific to their organizations	49%	32%	5%	14%
Hotel block management issues	47%	36%	10%	7%
Attendee late event registration and hotel booking trends	39%	36%	13%	13%
Event management technology investment levels/ requirements	34%	50%	9%	7%

Most Important Metrics and Issues Impacting Clients According to European Members
- Total attendance/delegate counts and quality: 91%
- Overall event management and/labor costs, inflation: 85%
- Travel costs, airfares or air travel issues: 79%
- Exhibitor/sponsor levels/demand: 77%
- Exhibitor/sponsor ROI: 77%

Most Important Metrics and Issues Impacting Clients According to North American Members
- Attendee engagement levels: 90%
- Overall event management and/labor costs, inflation: 90%
- Total attendance/delegate counts and quality: 90%
- Travel costs, airfares or air travel issues: 80%
- Exhibitor/sponsor levels/demand: 80%

Most Important Metrics and Issues Impacting Clients According to Asian Members
- Total attendance/delegate counts and quality: 100%
- Overall event management and/labor costs, inflation: 100%
- Travel costs, airfares or air travel issues: 75%
- Exhibitor/sponsor levels/demand: 57%
- Exhibitor/sponsor ROI: 57%

Most Important Metrics and Issues Impacting Clients According to Australian/New Zealand Members
- Total attendance/delegate counts and quality: 100%
- Travel costs, airfares or air travel issues: 100%
- Exhibitor/sponsor levels/demand: 100%
- Exhibitor/sponsor ROI: 100%
- Hotel room rate costs: 100%

How Clients are Changing

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

This was an open-ended question and key themes include:

- Changing event schedules and programming formats
- Budget restrictions
- Price sensitivity
- Concerns about geopolitical issues
- Making later final booking decisions
- Continued focus on sustainability
- A few members noted that both government and corporate groups are pulling back event programs, but others say that corporate events are strong

Select member comments:

> "Changed event schedules, i.e., reduced after hours dinners or social functions. Tighter budget constraints. Shorter booking window and last minute booking of their delegates."
>
> "Contract negotiations with increased lawyer involvement, risk management focus, sustainability conversation shifting, geopolitical situations increasing impact on venue selection."
>
> "Decrease number of government and corporate events."
>
> "Decrease of government events and decrease number of participants for the last two years."
>
> "Event confirmation windows have become shorter over the past few years, while increased hotel and travel costs since the pandemic have also affected how clients plan and make decisions especially for our destination."
>
> "Expect more commission. Now they include more sustainable features requests."
>
> "Growing, moderate."
>
> "Increasing steadily, more technology."
>
> "Industry trends have affected type of exhibiting companies and rising costs of services. Supply chain issues, budgetary restrictions, geopolitical issues, visa requirements."
>
> "It takes longer to take a final decision, so we are working in shorter terms than a few years ago."
>
> "It's still very hard to reach the corporate clients. Maybe the size of the events is slightly smaller."
>
> "Later lead times to bookings, later providing final numbers as the delegates are booking late."
>
> "Less willing to take risks, tougher cancellation and payment terms required, more struggle with contracting and including even more details in an early stage."
>
> "Looking for more cooperation from the city, events design and catering focus."
>
> "Meeting restriction policy from government, reduce number of attendees."
>
> "More and more price sensitive."

"More emphasis on PCOs and repeat clients."

"More focus on cost."

"More price sensitive, longer decision making process, and need more city/destination support."

"More risk sensitive and also more resilient and adaptive."

"Much more content-oriented (key speakers, do I learn new things? networking, business-leisure). Cost value becomes key since attendees go to fewer events due to reduced T&E budget, concerns with travel issues and safety, carbon footprint reduction."

"Not really, more technical needs; for corporate clients more immersion and festival character."

"Our most important clients have increasingly shifted toward last-minute event confirmations and more variable delegate counts, fluctuating both upward and downward compared to initial projections."

"Over the past few years, we have seen lower attendance levels compared to previous years, as many clients are being more selective with travel and event participation due to budget pressures and changing working patterns. Clients are also placing greater focus on service offerings and overall value, expecting more tailored experiences, flexibility, and measurable ROI from events. There is a stronger emphasis on quality, attendee engagement, and added-value services rather than simply hosting large-scale events."

"Overall rate conscious (convention center rental, hotel rates, F&B spend)."

"Overall stable, with some events (main large events) having grown. Contract negotiation has become more rigorous. Clients have become more susceptible to similar events/conflict/competition events. Client needs in general have become more demanding."

"Response time."

"Short term decisions, high expectations on service, technology and flexibility on staff."

"Shorter book periods and longer contracting periods."

"Shorter lead in times."

"Shorter planning windows, more flexible cancellation policies, health focus (i.e., impact on catering, natural light spaces)."

"Short-term changes and confirmations, budget-sensitivity increased, more internet and Wi-Fi bandwidth, less paid catering needs, reduction of poster space."

"Smaller footprint and less exhibitors."

"Some have gone to other venues that have hotel room blocks, smaller venues. Larger events want more space and attendees with a higher level of technology."

"Some of our events are growing; and we won't be able to welcome them anymore. Competition within our city from new venues. We are experiencing difficulties accommodating all our regular clients, as they are all requesting availability during the same period."

"Somewhat increase in public and trade exhibitions and entertainment events."

"They have become more cost-sensitive and are placing greater emphasis on attendee promotion and engagement."

"They show greater price sensitivity and require a premium service."

"They use more advanced technology systems for AV."

"Very much so in all different kind of matters."

"We are regional and seeing a trend due to cost of living staying closer to major capital cities close to association base. Very budget aware and expecting venue to be more flexible with rates."

"We are seeing more national corporate, tech, fintech, medical and sports."

"We have observed that association meetings combining conferences and exhibitions are increasingly featuring larger-scale exhibitions."

"We have seen a growth on international corporate meetings and international exhibitions, in result of our work towards those markets."

"We see association bookings with increasingly shorter lead-in times. Conversely, corporate bookers are booking further out. Increased emphasis on pharma code. Increased focus on costs across all sectors. Increased geopolitical awareness at the point of booking a venue."

"With rising costs but same or lower budgets they are reverting back and taking less risk on new technologies."

IV. Marketing Strategy

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

Venue Sales and Marketing Challenges

Survey Question: Which of the following are challenging to your sales and marketing efforts?

The top sales and marketing issues are competition, rising costs, the need for more subvention funds, and managing major capital investment projects.

Worldwide	Challenging	Moderately Challenging	Neutral	Not Challeng-ing
Competition	58%	38%	3%	0%
Cost controls, inflation	58%	32%	10%	0%
Lack of bid subvention funding	40%	32%	23%	5%
Managing or planning major capital investment programs or expansions, etc.	40%	28%	26%	5%
Facility or infrastructure upgrade/enhancement requirements	38%	50%	5%	7%
Overall convention, event and/or group demand/business activity	36%	43%	16%	5%
Availability of offsite/outdoor venues for large groups	29%	27%	24%	20%
High occupancy and/or high hotel room rates in destination	27%	42%	18%	13%
Staffing, hiring and retention	27%	41%	22%	10%
Lack of air lift in and around destination	23%	25%	27%	25%
Destination governmental or political issues	23%	23%	26%	28%
Technology investment levels/requirements	17%	59%	21%	3%
Lack of hotel capacity in destination	16%	37%	25%	23%
Destination specific economic issues	14%	26%	33%	26%
Safety and security issues inside and outside venues, hotels and/or downtown areas	12%	35%	23%	30%
Sustainability initiatives	10%	42%	31%	17%
Relations with hotel partners	3%	24%	43%	29%
Relations with other event industry service providers and hospitality partners	3%	19%	52%	26%

Most Challenging Sales and Marketing Issues for European Members
- Competition: 55%
- Managing or planning major capital investment programs or expansions, etc.: 53%
- Cost controls, inflation: 50%
- Facility or infrastructure upgrade/enhancement requirements: 45%
- Lack of bid subvention funding: 37%

Most Challenging Sales and Marketing Issues for North American Members
- Cost controls, inflation: 60%
- Lack of hotel capacity in destination: 50%
- Overall convention, event and/or group demand/business activity: 40%
- High occupancy and/or high hotel room rates in destination: 30%
- Lack of air lift in and around destination: 30%

Most Challenging Sales and Marketing Issues for Asian Members
- Competition: 89%
- Cost controls, inflation: 67%
- Lack of bid subvention funding: 67%
- Destination governmental or political issues: 56%
- Overall convention, event and/or group demand/business activity: 56%

Most Challenging Sales and Marketing Issues for Australian/New Zealand Members
- Competition: 100%
- Cost controls, inflation: 75%
- Staffing, hiring and retention: 75%
- Overall convention, event and/or group demand/business activity: 67%
- Lack of bid subvention funding: 50%

Sales and Marketing Strategy and Tactical Changes

Survey Question: What have you implemented or changed related to your sales and marketing over the past year?

Three out of four member teams worldwide have recently reviewed their pricing and service levels. Other important sales and marketing changes have focused on adding technology and software, targeting new or different markets, and gathering more competitive information. Over half of centres have changed their marketing approach and/or messaging.

Worldwide	Implemented or Changed	Not Implemented or Changed	Not Applicable
Reviewed our pricing and service levels	76%	22%	2%
Invested in technology or other major enhancements	64%	32%	4%
Pursuing other market segments, different types of events/groups	61%	37%	2%
Gathered more competitive information/intelligence	60%	40%	0%
Changed marketing approach or messaging	57%	43%	0%
Worked with agencies or outside marketing consultants	54%	36%	10%
More marketing investment, increased marketing budget	50%	50%	0%
Hired more sales and marketing staff	40%	57%	3%
Pursued local business alliances	39%	51%	11%
Worked closely with hotel partners	36%	56%	8%
Invested in new build, expansion or renovation	35%	53%	12%
Changed DMO-CVB relations	18%	66%	16%
Developed an "Ambassador" program	17%	57%	26%
Joined a marketing alliance	14%	72%	14%
Increased subvention and incentive activity	9%	68%	23%

Most Important Sales and Marketing Changes to European Members
- Worked with agencies or outside marketing consultants: 64%
- Reviewed our pricing and service levels: 63%
- Invested in technology or other major enhancements: 62%
- More marketing investment, increased marketing budget: 61%
- Pursuing other market segments, different types of events/groups: 60%

Most Important Sales and Marketing Changes to North American Members
- Gathered more competitive information/intelligence: 100%
- Reviewed our pricing and service levels: 100%
- Invested in technology or other major enhancements: 70%
- Pursuing other market segments, different types of events/groups: 70%
- Pursued local business alliances: 60%

Most Important Sales and Marketing Changes to Asian Members
- Reviewed our pricing and service levels: 89%
- Gathered more competitive information/intelligence: 89%
- Invested in technology or other major enhancements: 78%
- Invested in new build, expansion or renovation: 78%
- Pursuing other market segments, different types of events/groups: 67%

Most Important Sales and Marketing Changes to Australian/New Zealand Members
- Changed marketing approach or messaging: 100%
- Gathered more competitive information/intelligence: 100%
- Hired more sales and marketing staff: 75%
- Worked with agencies or outside marketing consultants: 75%
- Reviewed our pricing and service levels: 75%

Lead Generation and Bookings Marketing Channels

Survey Question: Which of the following marketing channels are important to your lead generation and bookings efforts?

Industry events, strategic partnerships, and SEO optimization are the top channels for generating quality event and meeting client leads.

Worldwide	Important	Neutral	Not Important
Trade shows and events	86%	14%	0%
Strategic partnerships (agencies, etc.)	78%	22%	0%
Search engine optimization (SEO)	72%	26%	2%
Email marketing and marketing automation	58%	31%	11%
Public relations and influencers	54%	35%	11%
Paid advertising (Google Ads, Meta Ads, etc.)	47%	39%	14%

Most Important Lead Generation Channels to European Members
- Trade shows and events: 90%
- Strategic partnerships (agencies, etc.): 83%
- Search engine optimization (SEO): 78%

Most Important Lead Generation Channels to North American Members
- Strategic partnerships (agencies, etc.): 80%
- Public relations and influencers: 70%
- Search engine optimization (SEO): 70%

Most Important Lead Generation Channels to Asian Members
- Trade shows and events: 89%
- Search engine optimization (SEO): 75%
- Email marketing and marketing automation: 57%

Most Important Lead Generation Channels to Australian/New Zealand Members
- Strategic partnerships (agencies, etc.): 100%
- Trade shows and events: 75%
- Email marketing and marketing automation: 75%

Relationship with DMOs-CVBs

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

Most members have not made major changes to their partnership with their DMO-CVB in the last year.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Made important changes to partnership or working agreement/ arrangement with DMO-CVB	20%	20%	40%	11%	25%
Important staff changes related to DMO-CVB and Centre partnership or working agreement/arrangement	15%	15%	40%	0%	25%
Changed types of events and groups targeted by the Centre	14%	14%	10%	11%	25%
Changed the types of events and groups targeted by the DMO-CVB	10%	10%	30%	0%	0%
Important changes to Centre marketing and messaging strategy implemented or assisted by DMO-CVB	8%	8%	20%	11%	25%
Increased the booking window period controlled by the centre	7%	7%	10%	22%	0%
Decreased the booking window period controlled by the centre	2%	2%	10%	0%	0%
No change	47%	47%	10%	33%	50%
Not applicable	15%	15%	10%	44%	0%
Other	3%	3%	10%	0%	0%

How Members are Working with the Hotel Industry

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

Many members have been actively working with their hotel community partners. Half of the membership around the world has been talking about the competitive issues related to convention, exhibition and major event bookings to their hotel partners. It's likely a positive sign that 45% of members say that hotel supply capacity is increasing in their markets.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
We have communicated the competitive issues related to convention, exhibition and major event bookings	50%	48%	50%	56%	75%
Hotel supply capacity is increasing	45%	52%	40%	33%	50%
Overall hotel rates for event room blocks are increasing	34%	48%	30%	0%	50%
Asked for hotel room rate decreases	32%	38%	30%	11%	25%
Overall our relationships with the hotel community is improving	32%	24%	50%	33%	25%
Asked for contributions or participation in incentive funds to help win event and group business	25%	17%	50%	11%	50%
Worked with owners / managers / investors to make the case for the need for more hotel properties or rooms	18%	14%	40%	0%	50%
Overall hotel rates for event room blocks are decreasing	7%	3%	10%	11%	25%
Hotel supply capacity is decreasing	5%	0%	20%	11%	0%
Asked for hotel facility to reduce their hall or meeting space rent or services pricing	4%	7%	0%	0%	0%
Asked for more information related to their pricing formulas and decisions	2%	3%	0%	0%	0%
Overall our relationships with the hotel community is declining	2%	3%	0%	0%	0%
Other	9%	7%	20%	11%	0%

V. Staff Recruitment, Training and Retention

Covered here is analysis of new initiatives and procedures to improve talent recruitment, training, and retention. As in years past, recruiting and retaining staff remains a challenge for many member organizations around the world.

Level of Staff Recruitment Challenges

Survey Question: How challenging is recruiting suitable employees?

The majority of members (68%) say staffing issues are challenging or very/extremely challenging. This concern has been a long-term trend.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Extremely challenging, critical	8%	9%	0%	0%	50%
Very challenging	32%	22%	30%	56%	50%
Challenging	28%	28%	30%	33%	0%
Somewhat challenging	22%	28%	20%	11%	0%
Not at all challenging, not an issue	10%	13%	20%	0%	0%

Recruitment Challenges

Survey Question: How challenging is retaining suitable employees?

Retaining good employees looks to be a little easier than recruitment but this is still a challenge overall for the industry worldwide.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Extremely challenging, critical	3%	3%	0%	0%	25%
Very challenging	17%	13%	20%	11%	50%
Challenging	26%	22%	40%	22%	25%
Somewhat challenging	34%	34%	20%	56%	0%
Not at all challenging, not an issue	20%	28%	20%	11%	0%

Difficulty Finding Qualified Job Candidates

Survey Question: Are you finding it more difficult to find job candidates with the skills you need at various staffing levels? Select all that apply.

Around the world, mid-level positions are the hardest to fill and retain.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, at the senior management and executive level	29%	23%	20%	22%	75%
Yes, at the mid-level management level	53%	48%	40%	56%	100%
Yes, at the entry or part-time level	38%	35%	40%	22%	50%
No	14%	13%	40%	0%	0%

Percentage of Members With New Initiatives for Talent Recruitment, Training or Retention

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

Forty-four percent of members have instituted a new staffing-related initiative or program recently, and a number of these strategies and approaches are explained below.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes	44%	28%	40%	67%	100%
No	56%	72%	60%	33%	0%

Members describe their new initiatives for talent recruitment, training or retention:

> “Anonymous job applicants; internal courses.”
>
> “Bonding, education tied to continued service.”
>
> “Broader outreach and working with recruiter.”
>
> “Change the onboarding with a lot a good information, Great place to work certificate.”
>
> “Direct engagement with local academic institutions.”
>
> “Enhanced well-being opportunities and increased the training budgets.”
>
> “Hire an HR consultant to develop training programs for employees across various levels/positions.”
>
> “Hospitality and management training programs.”
>
> “HR software (quicker on boarding) and new recruitment campaign.”
>
> “HR specialized company for recruitment.”

“Implemented MindKey as our new HR system to streamline processes, boost productivity, and enhance the employee experience. Includes all-in-one HR Processes.”

“Implemented workforce management system (UKG). UKG is all about automating and streamline talent acquisition and retention.”

“Introduced targeted job fairs and outreach to strengthen recruitment pipelines Increased engagement with external recruitment agencies to expand candidate reach and reduce time-to-fill. Implemented structured and semi-structured interview frameworks, including case scenario analysis and SBAR-based questioning. Enhanced consistency and quality of candidate assessments for evidence-based hiring decisions. Delivered targeted upskilling and training programs aligned to departmental needs. Conducted department-by-department workforce reviews to identify capability gaps, recruitment priorities, and training needs. Adopted a more strategic, data-informed approach to workforce planning. Introduced reset and transition training to support organizational change and workforce adaptability. Achieved improved recruitment efficiency, higher quality candidates, stronger workforce capability, and enhanced employee retention.”

“Recruitment processes are highly regulated due to our public administration framework.”

“THT The Talent System.”

“Training and workshop for skill enhancement.”

“Training portal, LinkedIn, careers days.”

“Utilizing AI tools, offering related courses, and implementing AI applications.”

“We are promoting professional education, and we have delivered an internal communication course to strengthen team relationships.”

“We are working with consultants on that.”

“We have implemented a Declaration of Interest Form to streamline and protect the internal recruitment process.”

VI. Venue Infrastructure and Technology Investments

Provided in this section are survey results related to major investment projects and how centres are investing in technology. Findings around security and safety investments and how AI is being used by members are also included.

Major Capital Investment Programs: New Builds, Expansions and Renovations

Survey Question: Are you planning a new build, expansion or renovation project currently, or is one underway? Select all that apply.

Major capital investment projects are primarily renovation related. Thirty-eight percent of the members say they are not pursuing major capital investment or development projects currently.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Renovation underway	29%	35%	20%	11%	25%
Renovation in planning stage	26%	32%	10%	11%	25%
Expansion in planning stage	14%	10%	30%	11%	0%
Planned project/building investment has been postponed	14%	19%	0%	0%	50%
Expansion underway	12%	10%	20%	11%	0%
New build project in planning stage	3%	6%	0%	0%	0%
New build project underway	2%	3%	0%	0%	0%
No development plans currently	38%	32%	40%	67%	50%

Venue Spaces and Elements Most in Need of Investment

Survey Question: Which spaces and areas in your venue need the most enhancement or investment? Select all that apply.

The top five areas and amenities that need the most investment are technology infrastructure, meeting rooms, signage, ballrooms and exhibit halls. Technology infrastructure is the primary focus according to two-thirds of the membership around the world.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Technology infrastructure or services	66%	69%	56%	67%	75%
Meeting rooms	45%	44%	56%	56%	25%
Signage	45%	44%	67%	22%	50%
Ballroom(s)	40%	22%	67%	56%	50%
Exhibit halls	33%	31%	56%	11%	25%
Theatres / Entertainment facilities	31%	31%	33%	22%	25%
Outdoor, outside areas	28%	28%	44%	0%	50%
Loading dock and related areas	22%	19%	56%	0%	25%
Kitchen(s)	22%	9%	33%	44%	50%
Client-facing food service areas and restaurants	22%	19%	11%	22%	50%
Pre-function spaces	16%	6%	67%	0%	0%
Other concession areas and store-fronts	12%	9%	22%	0%	25%
Business centre	12%	13%	11%	0%	25%
Venue connections and links to transportation, such as shuttle bus and taxi areas	12%	16%	11%	0%	0%
Venue connections and links to hotels or other key buildings	10%	9%	22%	0%	0%
Other	14%	16%	11%	11%	0%

Is Government More Inclined to Invest in the Convention Centre Industry?

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

Twenty-six percent of members around the world say their governments are more inclined to invest in the convention centre industry than a few years ago. The 2025 survey found 38% said this.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
More inclined to invest	26%	23%	40%	38%	0%
Less inclined to invest	33%	25%	30%	13%	100%
No change	41%	52%	30%	49%	0%

Technology Investments and Projects

Survey Question: Which of the following technology-related areas are important in terms of your investment plans this year?

IT network security is the top technology investment category followed by sales and marketing platforms and digital signage and communication systems. Over half of members around the world are also investing in venue operations technology and safety and security.

	Important	Neutral	Not Important
IT network security, cyber security	67%	33%	0%
Sales and marketing	65%	35%	0%
Digital signage and communications systems	62%	38%	0%
Overall venue operations management and communications technology	61%	35%	4%
Venue safety and security	56%	39%	6%
Telecommunications, internet capacity and services	55%	40%	5%
Audio-Visual	49%	47%	4%
Electrical, HVAC and/or lighting	46%	50%	4%
Human resources, staffing software and platforms, professional development, career progression, mental and well-being initiatives	44%	48%	7%
Waste management	43%	49%	8%
Event production services	37%	49%	14%
Food and beverage-related (such as online ordering, self-service, etc.)	27%	60%	13%
Video, streaming, broadcasting services or studios	20%	65%	15%

Most Important Technology Investments to European Members
- IT network security, cyber security: 67%
- Telecommunications, internet capacity and services: 61%
- Overall venue operations management and communications technology: 59%
- Sales and marketing: 57%
- Digital signage and communications systems: 54%

Most Important Technology Investments to North American Members
- Digital signage and communications systems: 90%
- IT network security, cyber security: 90%
- Sales and marketing: 89%
- Telecommunications, internet capacity and services: 80%
- Overall venue operations management and communications technology: 80%:

Most Important Technology Investments to Asian Members
- Digital signage and communications systems: 57%
- Human resources, staffing software and platforms, professional development, career progression, mental and well-being initiatives: 57%
- Sales and marketing: 57%
- Electrical, HVAC and/or lighting: 43%
- Venue safety and security: 43%

Most Important Technology Investments to Australian/New Zealand Members
- IT network security, cyber security: 100%
- Venue safety and security: 100%
- Telecommunications, internet capacity and services: 75%
- Overall venue operations management and communications technology: 75%
- Audio-Visual: 75%

Security and Safety Initiatives and Investments

Survey Question: Over the past year which of the following have you done or implemented related to security and safety? Check all that apply.

Security and safety issues have become more important to venues over the past number of years, and this has required management focus and investment. Over the last year more than 80% have reviewed their security and safety procedures and teams and provided staff training around these critical areas.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Reviewed security and safety procedures and team	84%	81%	100%	75%	100%
Trained staff	84%	81%	90%	88%	100%
Added safety and security equipment	47%	45%	60%	38%	50%
Implemented new safety and security procedures	46%	39%	90%	13%	75%
Enhanced safety and security technology	42%	45%	60%	13%	50%
Consulted with Government and safety officials	40%	32%	40%	50%	100%
Basic tabletop exercise (internals only)	37%	29%	40%	38%	100%
Extreme emergency plans tabletop exercise (internals only)	33%	29%	60%	0%	75%
Discussed with or trained clients	26%	23%	30%	13%	75%
Extreme business continuity exercise (internal with external agencies)	25%	19%	20%	38%	50%
Hired security consultants	19%	16%	30%	0%	50%
No changes to date, but we plan to over next 12 months	5%	3%	0%	13%	0%
Other	2%	0%	0%	0%	0%

How AI is Being Used

Survey Question: How is your team using Artificial Intelligence? Select all that apply.

Nearly all venue teams are using AI for research and information gathering. The other top uses are to assist with reports and other content, and also creative content development. It’s still early in the AI revolution and most of the impact is likely to be seen within venue management and operational and service area software platforms.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Research and information gathering	93%	91%	90%	100%	100%
Assist with reports and communications content and information	76%	78%	70%	88%	75%
Creative content development	60%	53%	30%	88%	100%
Administrative task automation	38%	38%	50%	25%	75%
Using AI chatbots/virtual agents to handle customer, exhibitor, attendee or other inquiries	29%	38%	20%	25%	0%
Strategic planning and management decisions	17%	9%	30%	38%	25%
AI for event space management and optimization	14%	9%	10%	38%	25%
IT, telecommunications and infrastructure management and monitoring	14%	13%	0%	38%	25%
Marketing campaign automation and audience segmentation	12%	6%	10%	13%	50%
Purchasing software and platforms that include or integrate AI functions and tools	12%	9%	0%	25%	0%
Procurement and contracting	10%	13%	0%	13%	0%
Cybersecurity management and monitoring	9%	13%	0%	0%	25%
Finance management, functions and forecasting	7%	3%	0%	13%	50%
Predictive analysis for booking and pricing optimization	5%	3%	10%	13%	0%
HR and staff management	5%	0%	0%	13%	50%
Operational process monitoring and maintenance	3%	3%	0%	0%	25%
Safety and security management and monitoring	3%	3%	0%	0%	25%
Attendee and visitor personalization via information and wayfinding	0%	0%	0%	0%	0%
Other	3%	3%	10%	0%	0%

VII. Sustainability

The important issue of sustainability is covered here with a focus on the measures and actions being taken by members.

Sustainability Measures and Actions

Survey Question: What sustainable measures and actions have you put in place? Select all that apply.

Over eighty percent of members are focusing their sustainability efforts on overall waste reduction and sorting, food waste reduction, and 72% have been defining or enhancing their sustainability strategies.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Waste reduction, sorting optimization	88%	87%	90%	88%	100%
Reduction of food waste	84%	81%	90%	75%	100%
Sustainability strategy defined	72%	77%	60%	63%	100%
Sustainability department or dedicated person	63%	58%	80%	50%	75%
Sustainable labels or certifications obtained	56%	55%	50%	63%	50%
Personalized support for more sustainable events (or sustainable event guide)	49%	48%	50%	50%	25%
ESG or CSRD report	47%	52%	30%	75%	0%
Evaluation of suppliers and partners / Implementation of sustainable partnership criteria	46%	48%	40%	25%	50%
Green team	44%	45%	50%	13%	75%
Measurement of team satisfaction/well-being (corporate culture questionnaire or equivalent)	42%	42%	50%	25%	75%
Carbon footprint	40%	42%	20%	50%	50%
Carbon footprint reduction targets	40%	35%	30%	50%	75%
Carbon footprint compensation	23%	19%	10%	50%	25%
Mobility plan	16%	19%	0%	0%	75%
Materiality matrix / double materiality	12%	19%	0%	13%	0%
Other	12%	13%	10%	13%	0%

Renewable Energy Investments

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

A under half of the industry (46%) has been managing on-site renewable energy generation initiatives for many years. This survey finds that an additional 5% have recently added one of these programs and 14% have plans to initiate a renewable plan over the next one to two years.

	Worldwide	Europe	N. Amer.	Asia	Aus./NZ
Yes, we've been doing this for years	46%	53%	50%	0%	50%
Yes, we recently started this	5%	3%	0%	25%	0%
No, but have plans to over the next 12 to 24 months	14%	20%	0%	0%	25%
No, and have no plans to do this at this time	23%	20%	40%	25%	25%
Unsure	11%	3%	10%	50%	0%

VIII. Conclusion: Top Challenges and Opportunities

This final section focuses on two survey questions that captured write-in comments:

- What are the biggest challenges you and your senior executives and leaders are facing today?
- What are the biggest opportunities you see to increase your overall events business?

Select themes in the written responses are provided followed by various member comments.

Biggest Challenges Facing Centre Management Teams

Survey Question: What are the biggest challenges you and your senior executives and leaders are facing today?

Key themes in the write-in responses:

- Economic uncertainty, inflation, and slow growth
- Geopolitical risk, e.g., wars, political instability, visa constraints
- Unpredictable demand and changing client booking patterns
- Customer demands, negotiations, budget pressure and late-stage change orders
- Volatile travel conditions affecting attendance
- Rising operating costs for energy, labor, suppliers and technology
- Competition from new and enhanced venues and destinations
- Challenges in differentiation, brand positioning, and attracting clients
- Difficulty recruiting and retaining skilled staff
- Pressure and costs to adopt AI and the digitalization of venue management
- Continuing expectations around sustainability standards

Verbatim responses

> "Adaptation for new technologies and AI."
>
> "Adapting to technology, government uncertainty, political division, high personnel cost, controlled budgets, uncertainty, election year."
>
> "An ever changing business landscape with many issues including geopolitical issues, a new generation of planners, budgetary restrictions, supply chain issues, and visa requirements."
>
> "Being a public sector organization, one of the main challenges is the administrative and regulatory framework, which can limit operational flexibility and speed of decision-making compared to private sector competitors in the MICE industry. Increasing competition from other international MICE destinations and venues, which requires continuous investment in innovation and positioning. Rising operational costs and increasing investment requirements in technology, sustainability and infrastructure to remain competitive."
>
> "Burnout. Major organizational change underway this year."
>
> "Business competition, cost inflation and geopolitical risk."

“Capacity.”

“Cost increases for operating the venue and keeping up with technology.”

“Cost pressure, uncertainty economically, geopolitical, and ensuring consistent revenue growth against the increased operating costs.”

“Difficulty to reach and attract corporate clients, own organized exhibition difficulties.”

“Digitalization of processes and overall change management.”

“Economic and geopolitical uncertainty, managing high stress levels, understand how to implement AI to create value and maintain competitiveness.”

“Economic growth in the region, inflation, increased competition.”

“Economic uncertainty and weak political leadership in Europe.”

“Economy condition and government policy.”

“Employment of the right people and keep them in the team keeping up with safety and technology measures.”

“Geopolitical and economic factors affecting business growth.”

“Geopolitical developments and economic unrest. Implementing AI and data driven solutions. Lacking support from government.”

“Geopolitical uncertainty. Fear from the team we are about to go through another downturn in the business events industry, and skills shortage.”

“Global brand positioning.”

“Increase of operating costs, global political conflict, demand from workforce, expectations from stakeholders.”

“Keep on growing in the decisive MICE markets of tomorrow; while navigating through the uncertainties of current and looming black swans.”

“Maintaining a high level of service excellence with a well trained, multilingual staff. It is particularly challenging in the technical area to find technicians who also have strong language skills.”

“Minimizing operational disruptions and inconvenience to existing clients during the exhibition hall expansion project. Establishing a fair evaluation system to support employee incentive programs. Revenue impacts caused by increased expenditures due to ongoing inflation.”

“One of the key challenges faced by our leadership team is the increasing competition from other convention and exhibition venues.”
“One of the main challenges we face is the growing unpredictability of our business pipeline. Traditional booking patterns have largely disappeared, making forward planning and resource allocation significantly more difficult. This is further compounded by the increasing number of new convention centres entering the market, intensifying competition for a shrinking pool of predictable demand.”

“Overall economic depression.”

“Overall guest experience involving all the destination’s key players.”

“Revenue streams and revenue optimization, balancing costs and budget, charging event management adequately for services such as deep rental discounts and push back on labor charges or AV technology charges, fragmented business technology and too long learning curves, overworked management and outdated, inefficient booking and events platform.”

“Some of the biggest challenges we are currently facing include finding and retaining the right talent, particularly as the events industry remains highly competitive for skilled professionals. The current economic climate is also impacting businesses, with clients becoming more cautious around budgets and spending decisions. In addition, competition across the industry continues to increase, especially as more venues invest in modernization, upgraded facilities, and enhanced technology to attract clients. Keeping pace with evolving client expectations while remaining commercially competitive is a key challenge for senior leaders in the industry.”

“Talent Pool and challenges with skill shortage. Hybrid Work Model is becoming a request due to global challenges. However, the hospitality industry/tourism sector requires face-to-face interaction with clients. AI Integration into the workplace and the proper use of it from a Safety and Intelligence (the ethical use of AI). Client expectations have become more demanding to deal with over the years.”

“The biggest challenges are the uncertainty in the global environment and, on the local front, the expectation from our owner for us to move towards greater financial self-sustainability.”

“The biggest challenges today include a shortage of qualified staff in the MICE segment and continuously rising operational costs, particularly in energy, services, and suppliers. At the same time, there is increasing pressure to meet sustainability and ESG standards while delivering large-scale events. We also face strong competition from other European congress destinations, as well as the need to adapt to clients’ expectations for greater flexibility in long-term event planning.”

“The correct programming of the next few years when the reconstruction of the whole Exhibition and Congress Centre will take place, while we will have to continue our work and reach our targets and KPIs.”

“The weak governments and the weak economy and industry.”

“Uncertain economic environment, travel and accessibility.”

“Uncertain world, staff knowledge, skilled staff and retention, cost of living, ageing facility, lack of funding for capital works.”

“Uncertainty in world affairs and geopolitical risk.”

“Uncertainty.”

“Uncertainty and need to maximize revenue, decrease costs.”

“Uncertainty in global market.”

“Utter uncertainty due to the war in the Middle East.”

“Volatile markets impacting demand for events. Delegates’ ability to travel for events. Increased costs impacting the cost of doing business.”

Biggest Opportunities

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

Key themes in the write-in responses:

- Focus on attracting international association conventions and congresses, corporate meetings, and exhibitions
- Partnerships and collaborations for marketing and business development
- Leveraging destination appeal
- New venue expansions and related investments
- Technology investments around AI, software and hardware
- Expanding into new and growing event segments such as entertainment, sports, technology, finance and medical
- Exploring new revenue streams, i.e., F&B, digital signage, alternative venue uses, etc.
- Adding supporting assets like HQ hotels
- Improving transportation access
- Increasing sales activity, client/prospect outreach events, and client engagement
- Enhancing the client experience through flexibility, customization, and responsiveness
- Local and regional market development

Select comments:

"Capturing the small events/local market, increasing sales activity, and partnerships with academic institutions, partnerships with alternative venues offering. Diversifying food offerings beyond the facility and offering parking for major events, etc. Increase in automated services to prevent errors."

"Active sales teams, winning team in international sales."

"Attending more outreach events and more interactive outreach with clients."

"Availability. Our team does an exceptional job of maneuvering our booking calendar to look after both legacy events and new events."

"Client retention and focus on regional events."

"Closer collaboration with CVBs and industry partners to develop more homegrown anchor events that can be hosted annually. This would be more sustainable in the long run and help grow the overall market."

"Collaboration and regional business growth."

"Customer insights and data driven approach to improving our operating model."

"Decision in investment in the building (conference infrastructure)."

"Diversification, alliances with good brands and business, working close to government, international events, technology, marketing, artificial intelligence."

"Enhanced metro line connectivity."

"Entertainment events and exhibition growth."

“Expansion of venue capacity and facilities. Strengthening our global MICE competitiveness and international event attraction. Legacy-focused event strategies and value-added services. Digital transformation and AI-based event services. Growth in international conventions and industry exhibitions. Stronger collaboration among our venues, the city and tourism/MICE stakeholders.”

“Focus on national associations, co-create own events and partnership.”

“For our centre, the biggest opportunity to grow our events business lies in attracting more international association congresses by leveraging our city’s strong destination appeal, expanding sustainable event solutions, and building long-term partnerships with key clients.”

“Fortunately, we have become one of the largest global players of the MICE Industry. As such, we are gaining market shares in an uncertain environment where survival of the fittest has become the norm.”

“Geo-clones of own events, finding new local markets and cooperation with external stakeholders and ambassadors.”

“Government support and policy.”

“Growth in international association and corporate meetings demand, positioning the destination as a competitive MICE hub. The local meetings we are having nowadays are mainly concerts but international meetings are increasing. Development of hybrid and technologically advanced events, including improved connectivity, streaming and digital solutions.”

“If the economy recovers in the coming months, our industry will benefit.”

“Implementation of a new, more robust International Department focused on capturing international leads.”

“Increase capacity.”

“Integrate AI in marketing and sales strategies, Exploring new segments.”

“International business events.”

“International events with airport connecting.”

“It is generally weak.”

“Keep targeting large or extra large events, as we have the capacity to welcome them.”

“New market segments and event types.”

“New revenue sources and increased international business.”

“Online booking engine; faster/personalized quoting with total expense budget (need better booking platform to do that); developing better client satisfaction and meeting client demand for the growth markets such as corporate, medical, tech, fintech and sports, need our new HQ hotel to be open which is expected to unlock 40% of the meetings market for us.”

“Our biggest opportunities lie in our operational flexibility and our deliberate strategy of targeting multiple market segments simultaneously, avoiding over-reliance on any single client type and spreading risk across a diversified business portfolio. Additionally, our growing network of new partnerships enables us to offer more creative and tailored solutions to clients, opening doors to innovative event concepts and collaborations.”

“Parking, price, software platforms, CRM.”

“Political stability.”

“Prioritizing domestic and Asian markets.”

“Some of the biggest opportunities to increase our overall events business include continued investment in upgrading and modernizing the centre to meet evolving client expectations. Enhancing our service offerings, particularly AV and event technology capabilities, is also a key opportunity, as clients increasingly expect high-quality hybrid and fully integrated event experiences. By improving the overall customer experience and offering more flexible, technology-driven solutions, we can attract a wider range of events and remain competitive within the market.”

“Strengthen bidding strategy and alliances.”

“Success of our big sales and marketing investment.”

“Target international events that would be considering the USA.”

“The biggest opportunities to grow our overall events. Business lies in attracting more international conferences and exhibitions, enhancing digital and hybrid event capabilities, and leveraging AI to improve operational efficiency and client experience.”

“The development of technology.”

“The enhancement of transport connections once the high speed rail service becomes operational, as it will significantly reduce reliance on air travel.”

“There is still an increase in request for the different and types of events and meetings.”

“We are receiving events that were scheduled for the Middle East.”

“With the political changes in our country, we expect to become attractive to most international clients.”

“Workforce development.”

International Association of Convention Centers
Email: secretariat@aipc.org
www.aipc.org