



Association Meeting Needs

ICCA Survey 2021



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AFRICAN SOCIETY OF ASSOCIATION EXECUTIVES





INTRODUCTION

This survey was conducted in 2021 in collaboration with the African Society of Association Executives (AfSAE) and the Asia-Pacific Federation of Association Organizations (APFAO) and the European Society of Association Executives (ESAE).

This survey follows on from a survey previously conducted in May and September 2020. A total of 120 responses were received globally from across the regions.

Key questions:

1. How are association meetings changing?
2. How are associations adapting their processes to respond to the changes?
3. What are delegates 'sentiments'?
4. What are the most important requirements from meeting suppliers?
5. How can suppliers help associations in their recovery efforts?

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How are association meetings changing?

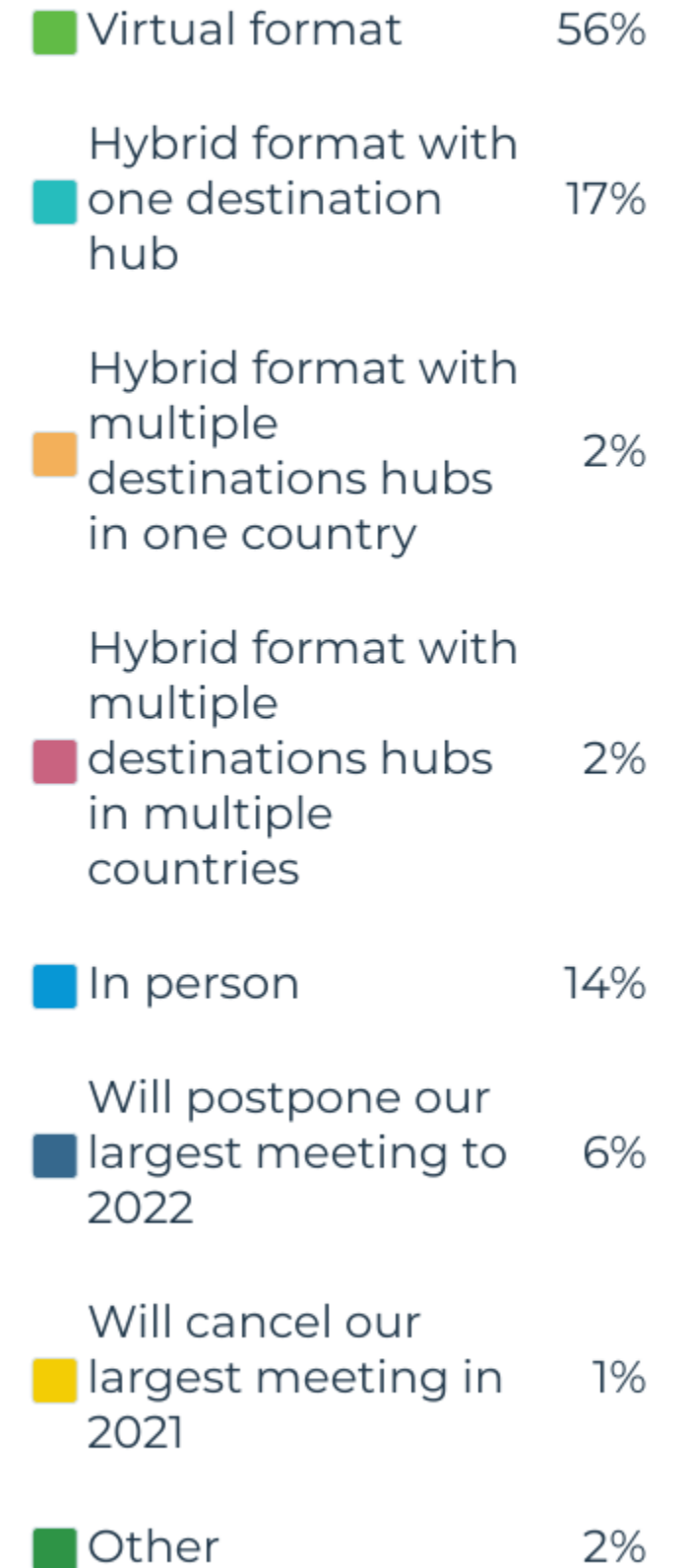
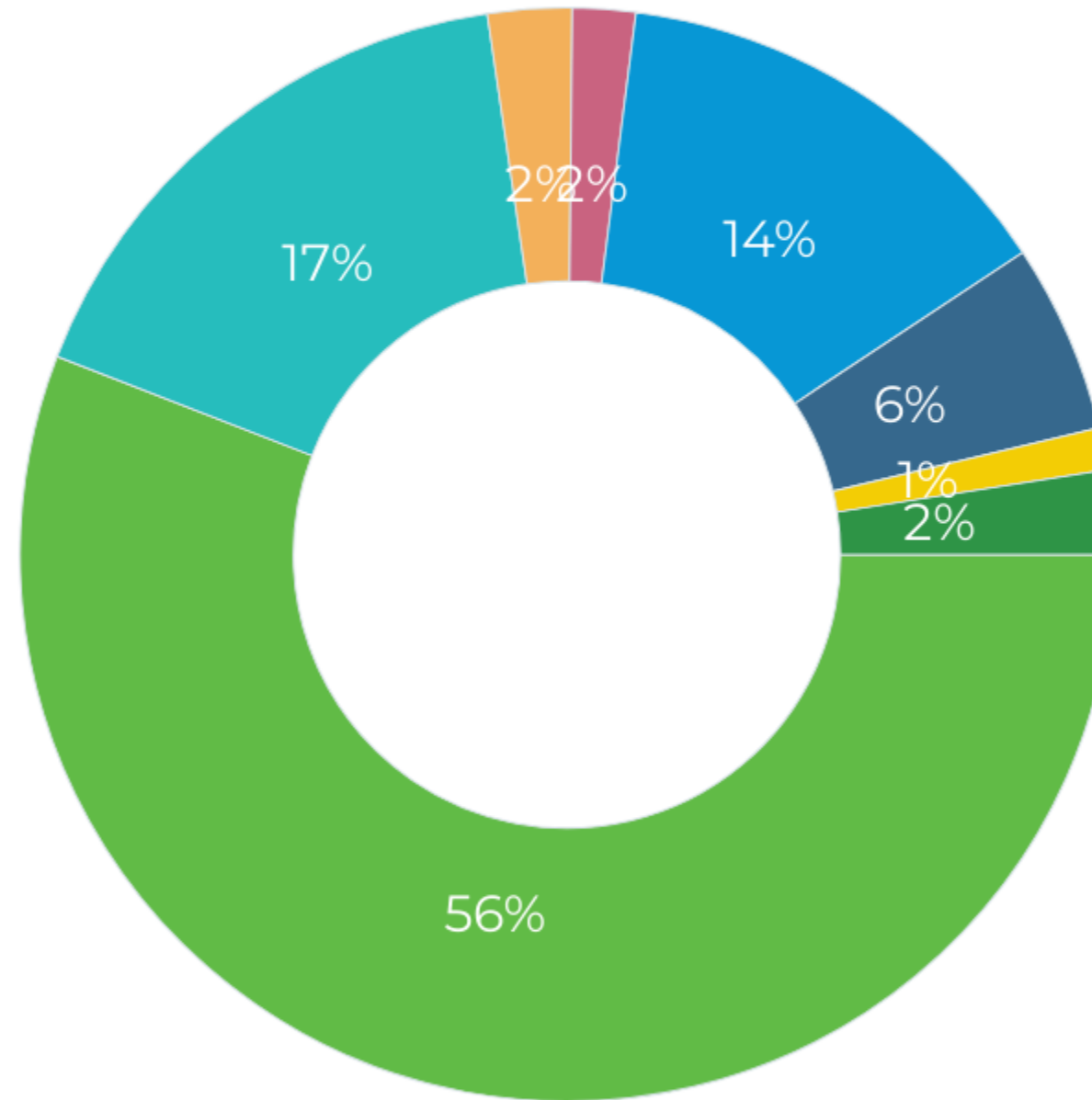


2021 MEETING FORMAT

What format will you be adopting for your largest meeting planned in 2021?

Insights

Face to face meetings are clearly not returning as quickly as the industry was hoping for, but it is promising to see that a total of **35% of respondents are planning a meeting format for this year which includes an in person element** (fully in-person or hybrid with and without hubs).



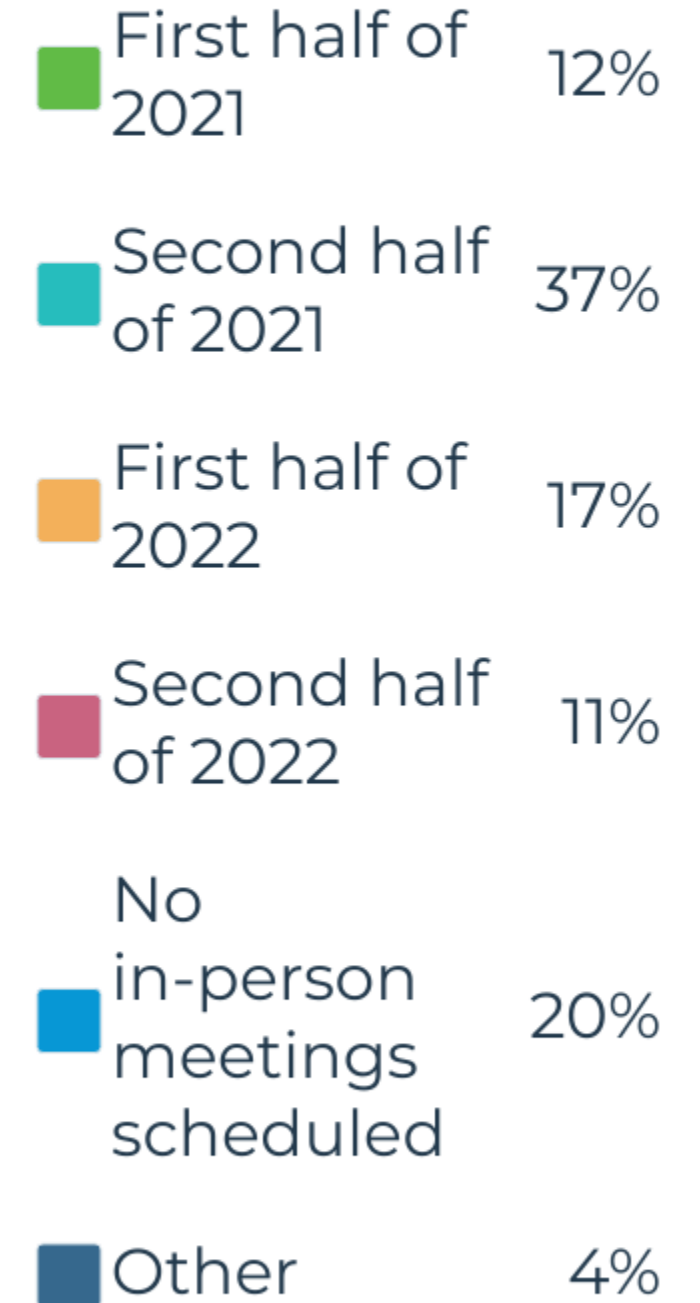
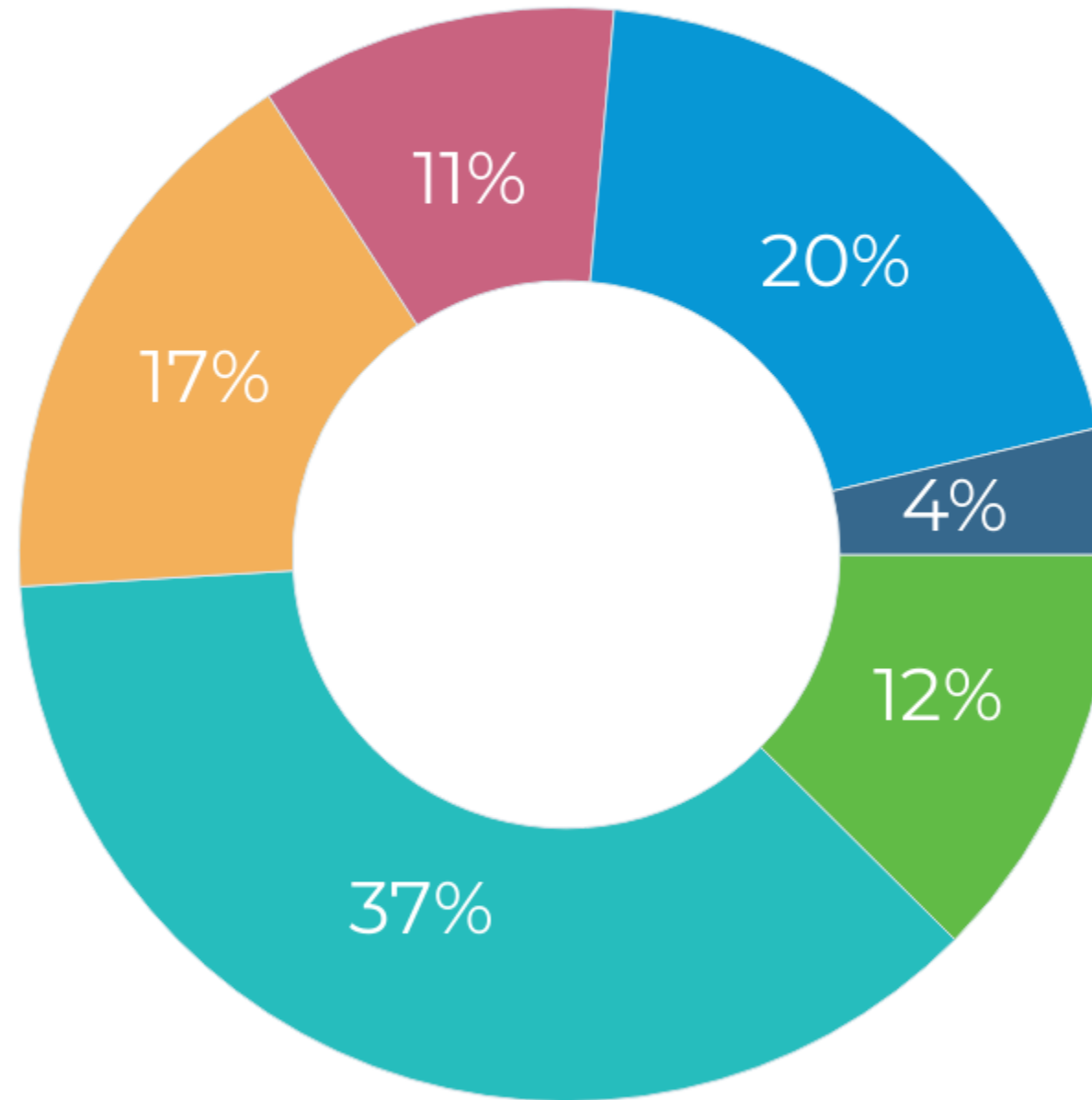


IN-PERSON MEETING RETURN

When is your first in-person meeting of 50 participants or more scheduled for?

Insights

Associations are taking opportunity to schedule in-person formats where they can, with a total of **49% of respondents planning an in-person meeting for the first or second half of this year**, and a remaining **38% scheduling in person meetings for next year**.



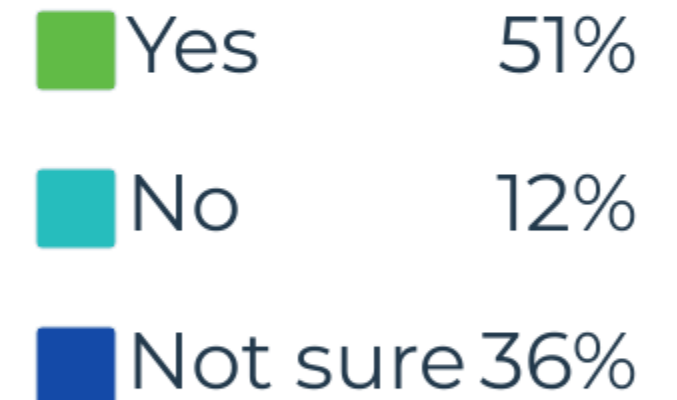
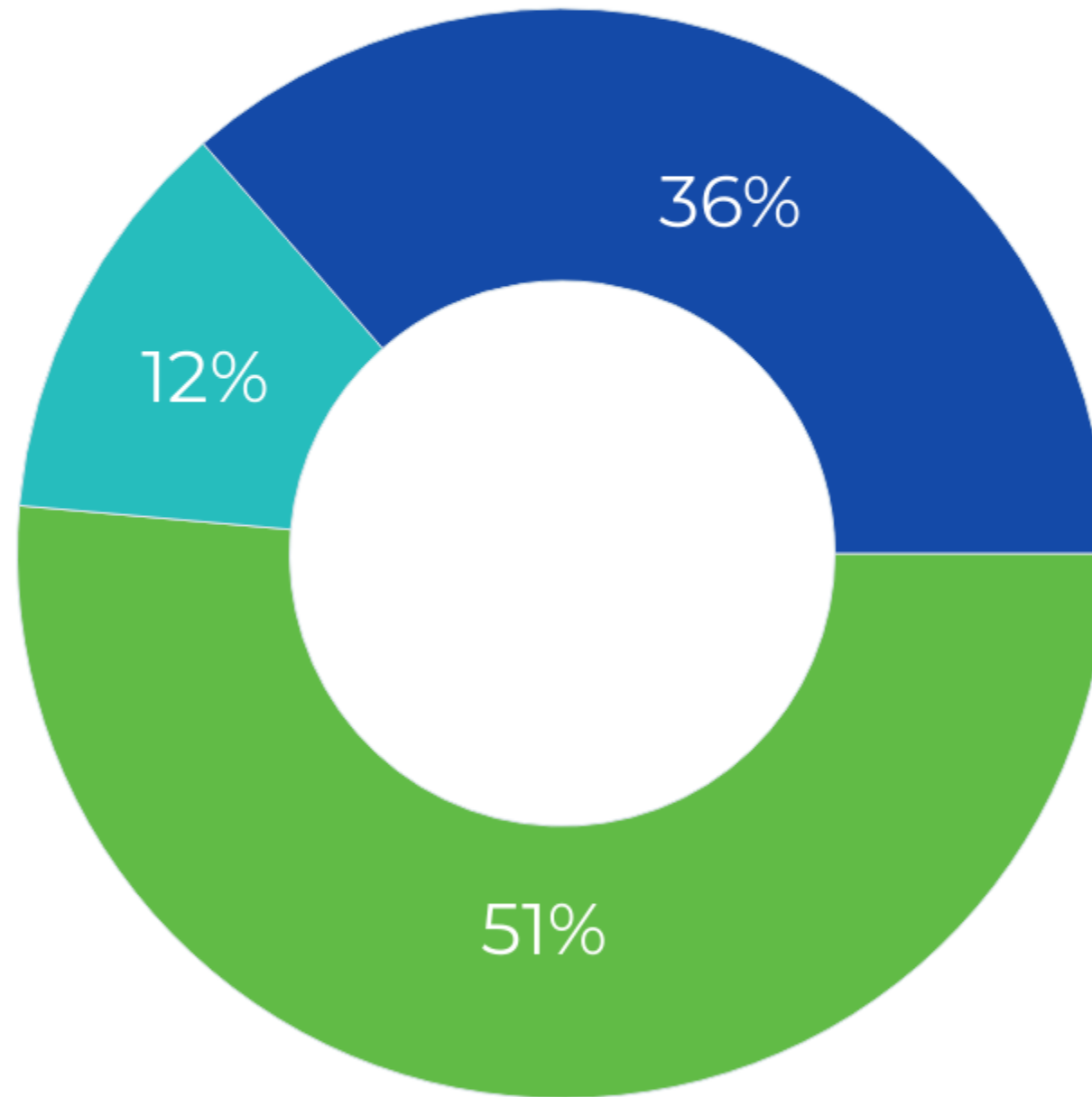


REGIONAL MEETINGS

For 2021 and beyond, are you anticipating more regional meetings?

Insights

There is a clear trend towards regional meetings, with **the majority of respondents anticipating more regional meetings** for 2021 and beyond, compare to 36% (May 2020) and 23% (September 2020) respectively in the two surveys conducted in 2020.



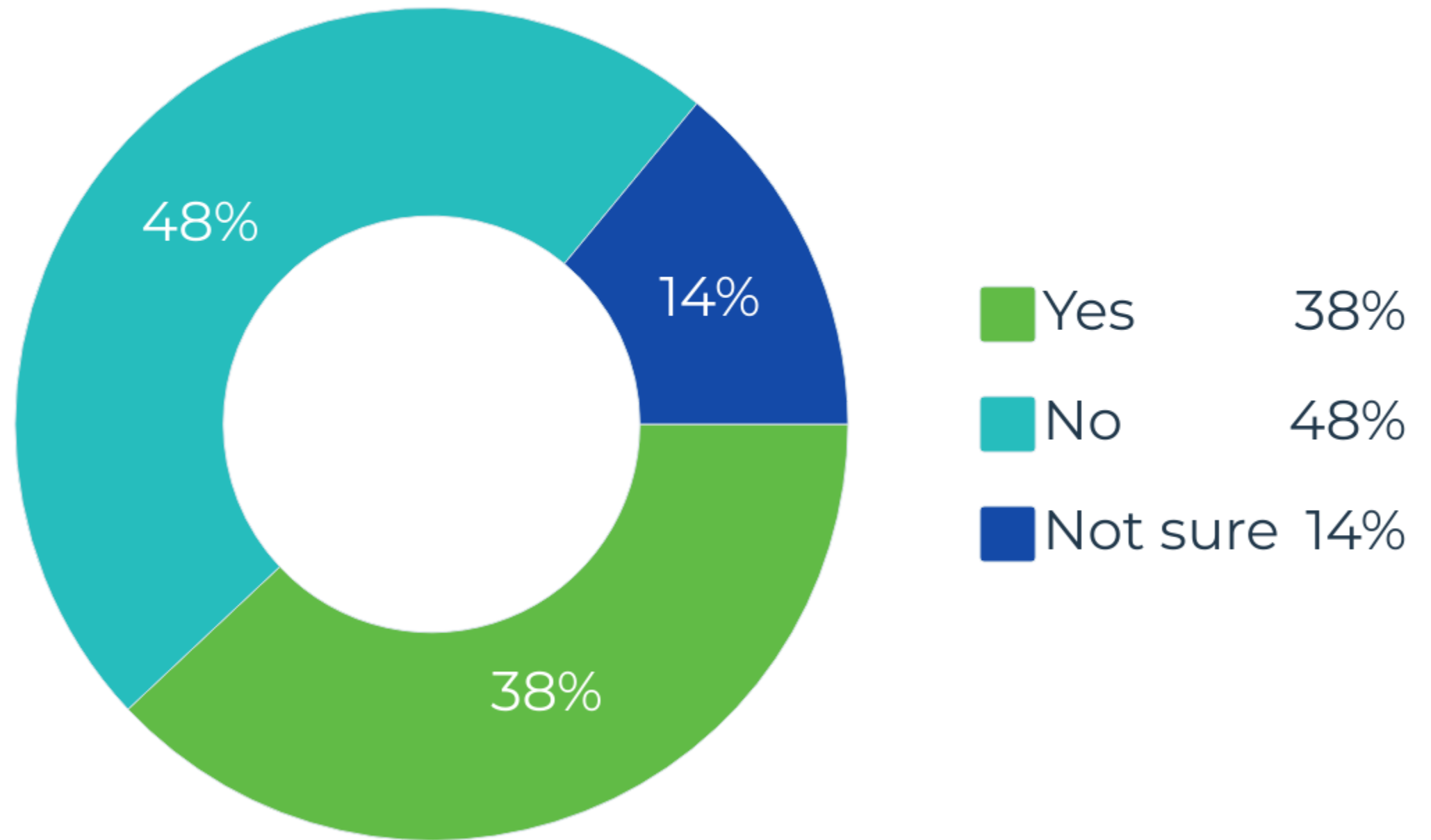


MEETING ROTATION

Has the COVID-19 pandemic affected the rotation pattern of your meetings going forward?

Insights

For almost half of respondents, the rotation pattern for their meetings have remained unaffected. For the 38% who have seen their rotation pattern affected, this is mostly due to meetings being postponed into the next year, although there have been some mentions about future rotation patterns taken a more regional approach.



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How are associations adapting their processes to respond to the changes?

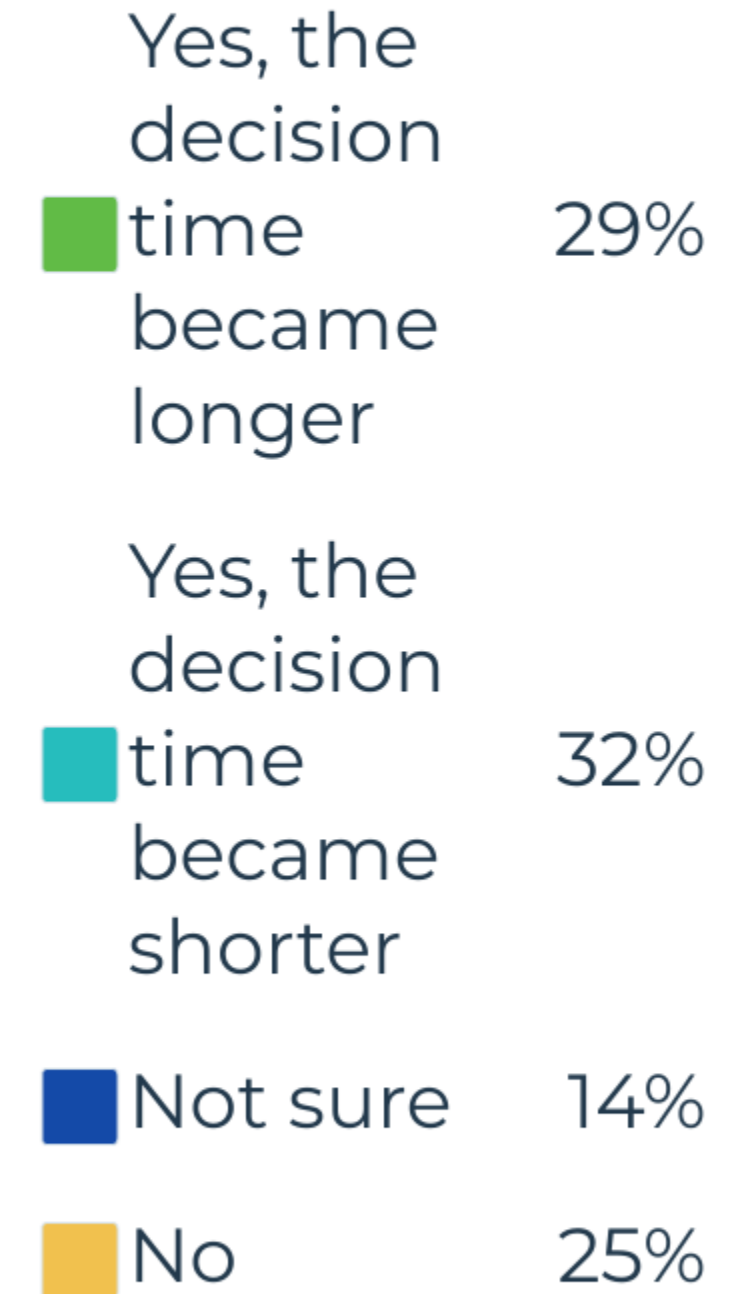
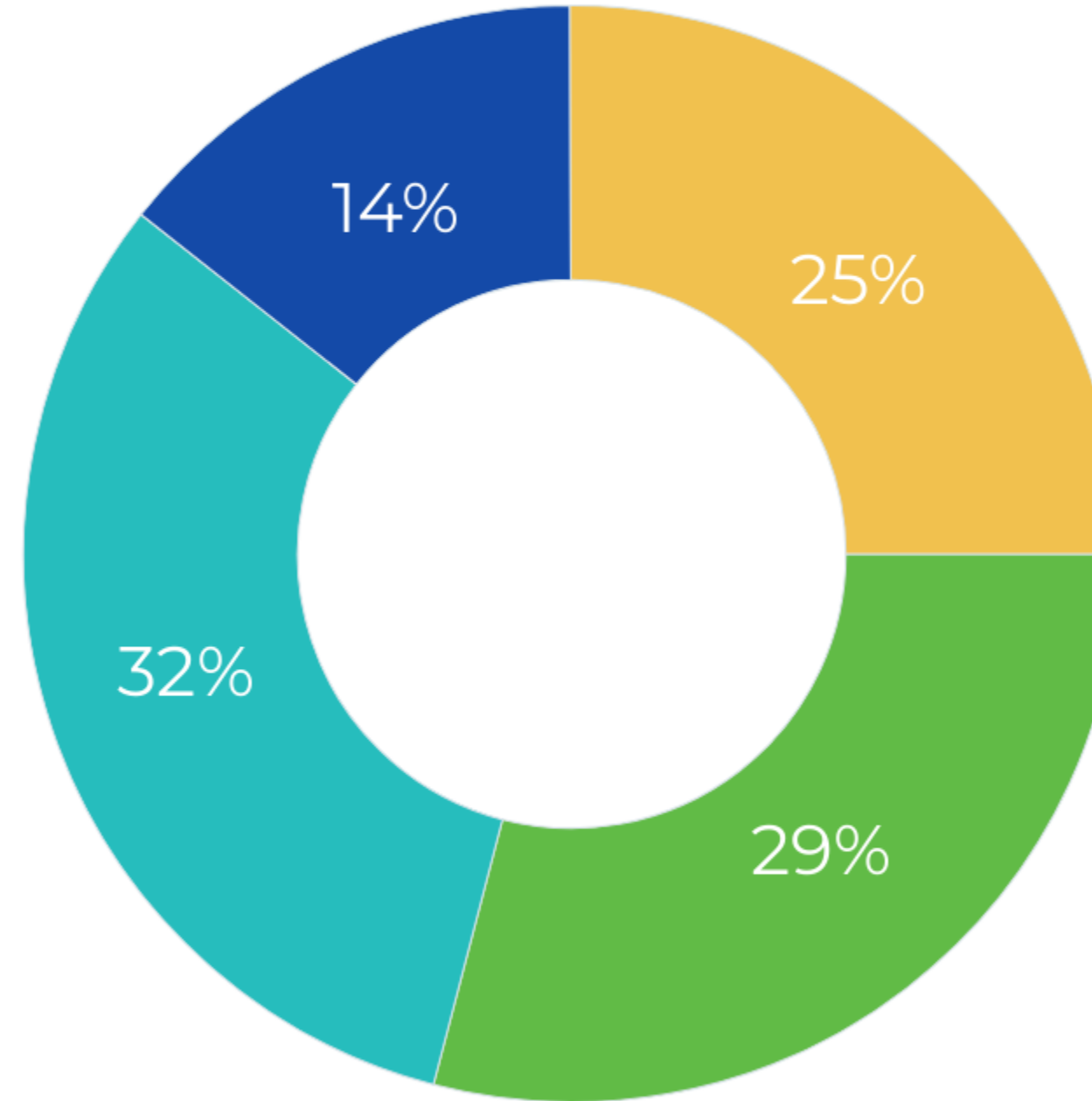


DECISION-MAKING TIMELINE

Has your decision-making timeline for the meeting in the first open year (i.e. first year without confirmed booking) changed?

Insights

The decision timeline seems to be affected in different ways for different associations with around a third responding this has become longer, and a third responding this has become shorter.





IMPACT OF TECHNOLOGY

Has technology changed the way you conduct meetings and if yes how?

Insights

For 96% of respondents technology has impacted the way in which they conduct meetings.

Compared to the May 2020 survey, there is a trend towards investing more in professional production with only 8.4% in May 2020 compared to 38% in March 2021.

We are adding hybrid elements to all events or some events	49%
We are using only low cost solutions to support virtual/hybrid elements (i.e. Zoom, Webex, GoToMeetings)	46%
We are investing in professional production of digital elements for future events	38%
We are sourcing high quality streaming options for limited sessions (i.e. only keynotes)	16%
Technology has not changed how we are conducting our meetings in	4%
Other	6%



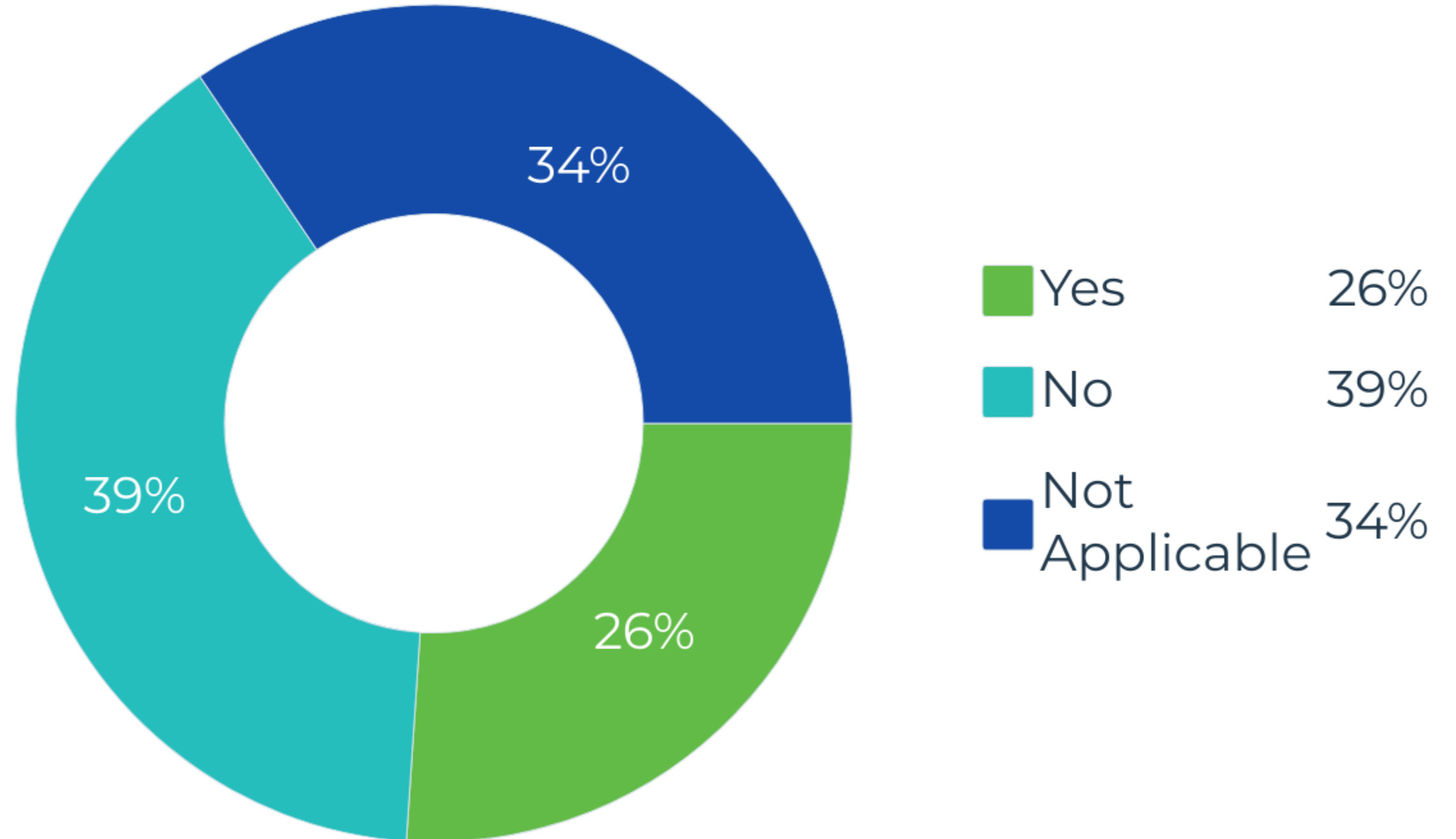
RFP (REQUEST FOR PROPOSALS)

Have you amended your RFP?

Insights

For many associations RFPs are changing, with the most common mentions including:

- Changes to cancellation options and force majeure clauses
- Hybrid meeting requirements
- Flexibility regarding delegate numbers and dates





KEY QUESTION

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What are delegates' sentiments?

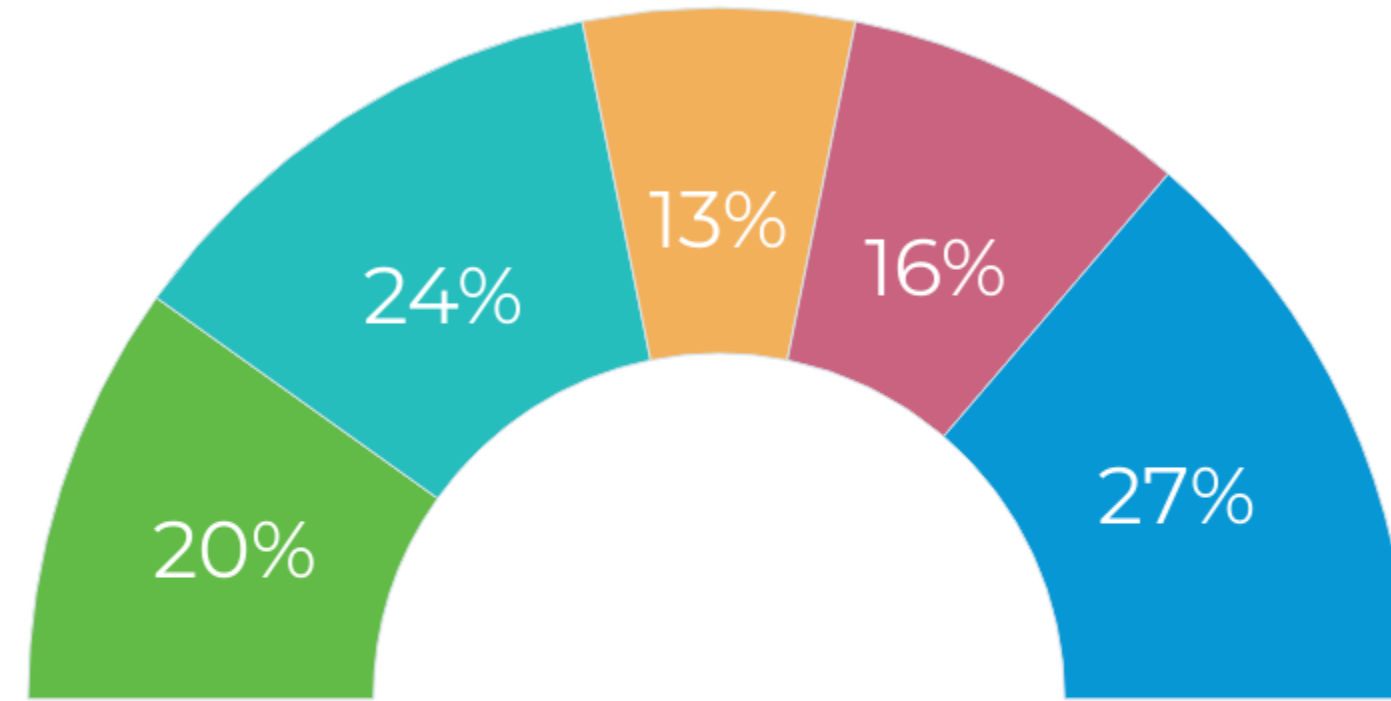


TRAVEL INTENTIONS

When are your members saying that they are happy to travel to a meeting?

Insights

Responses are mixed, similar to those seen for the 2020 survey. Whether people are willing and able to travel, is influenced by a variety of factors.



- When travel restrictions lift 20%
- When there is a vaccine 24%
- When the virus is 'under control' in the destination 13%
- When health and safety measures are in place 16%
- All or some of the above 27%



VALUE OF FACE TO FACE

What are your members saying about the value of face to face meetings? What do they miss about face to face?

Insights

When comparing the results from the 2020 survey, it is clear that **the general sentiment about the need for meeting face to face has not only remained, but intensified.** The camaraderie apparent in face to face meetings does not exist at the same level when collaborating digitally and remotely. More than an entire year spent in the online environment only brought more certainty that **face to face experiences cannot be fully replaced with digital alternatives.**

Virtual meetings have limitations to the networking discussions that face to face meetings offer	84%
At face to face meetings you meet new people and make new contacts in the field	70%
Face to face offers a sense of community	66%
Face to face offers the opportunity to immerse into the subject, away from daily tasks	53%
The ability to meet a wide range of people from across the globe in one place	44%
To enjoy the personality of the host destination	41%
To gain a better understanding of the subject matter and specialists from the host location	27%
Other	6%

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What are the most important requirements from meeting suppliers?



VALUE OF EXTERNAL SERVICES

What services are of the greatest importance to you?

Insights

Amongst the ‘traditional’ services provided by PCOs and AMCs, there is a shift towards a greater need of **support in the production of virtual event and integrated digital meeting platforms.**

DMC / Logistics services	42%
Production of (virtual) Events	40%
Integrated digital meeting platforms	40%
Congress organization for one-off events	38%
Exhibition Management	35%
Communication for events	35%
Core PCO services	33%
Sponsorship and fundraising	33%
Abstract Management	24%
Association Management / Secretariat	22%
Experiential and Meeting Design	13%



MEETING REQUIREMENTS

What are the most important requirements from meeting suppliers?

Insights

C-19 related safety protocols and flexible contract conditions were amongst the highest rated requirements from meeting suppliers. Assistance with content creation and recruitment of local subject matter experts were considered of least importance.

No.1	Flexible contract conditions
No.2	COVID-19 related safety protocols/ certification
No.3	Integration of technology to support hybrid and online events
No.4	Flexible space accomendation
No.5	Assistance with communications regarding local COVID-19 regulations
No.6	Support with travel arrangements associated with local COVID-19 regulations
No.7	Assistance with promotion and communications surrounding the meetings
No.8	Assistance with recruiting local subject matter experts
No.9	Assistance with content creation

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How can suppliers help associations in their recovery efforts?



RECOVERY EFFORTS

How can suppliers help associations in their recovery efforts?

✓	Transparency and good communication
✓	Effective partnerships and collaboration
✓	Flexibility on contract terms (dates, spaces, numbers, cancellation)
✓	Support with local C-19 regulations
✓	Support with health and safety regulations
✓	Strategic alliances and 'beyond tourism' approach
✓	Affordable hybrid solutions
✓	Promoting face to face meetings
✓	Sharing best practices and exchanges knowledge



ICCA EDUCATIONAL CONTENT

What topics would you like to hear about in ICCA's education content for associations?

Insights

In terms of educational content for associations, there is still a high need to learn about the practicalities of **organizing hybrid events, and meetings technology** in general. **C-19 safe meeting planning and virtual event ROI** were also scored high. There is less of an emphasis currently on the need to learn about creating meeting legacy programs or how to work effectively with meeting management companies.

How to organize hybrid events	65%
Meetings technology	57%
COVID-19 safe meeting planning	49%
Digital content strategy	46%
Virtual event ROI	43%
Crisis Management for meetings	38%
Member engagement	36%
Marketing and communication for meetings	28%
Destination selection: bidding and decision making	27%
Negotiating with hotels	26%
Creating meeting legacy programmes	18%
Working with Meetings Management Companies	15%