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MMGY Travel Intelligence specializes in syndicated and custom market research exclusively for the travel and tourism industry. We boast the industry's most expansive and richest historical database and strive to provide the highest-quality consumer and B2B travel and traveler research.

Our mission is to provide clients with valuable insights they can apply to guide decisions and improve business results. Our portfolio of products and services is designed to power travel industry leaders through actionable consumer insights, reliable travel performance data, and innovations in audience modeling and segmentation.



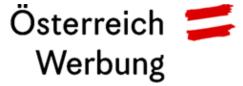
Meet the Sponsors

We would like to thank our partners and sponsors for their support on the **2023** *Portrait of European Meeting & Convention Travel*"Wave IV" Report. Thanks to their efforts, valuable feedback and assistance reaching out to European meeting planners, we were able to conduct the research, analyze the data and develop the insights in this meetings and events report.



















Methodology

Planning Professionals

- We qualified a sample of 133 Planning Professionals in Wave IV as defined below. Respondents
 were selected using planner lists from IMEX, MMGY and sponsors; they were invited via email and
 social media to respond to the survey. Respondents were screened as follows:
 - 18 years of age or older
 - Meeting professionals' role defined as one of the following: Corporate meeting professional, Association meeting professional, Independent/ third-party meeting professional, Government meeting professional, Conference and convention meeting professional
- Data for this wave was collected between November 13th, 2023 and January 2nd, 2024.

Meeting Attendees

- We qualified a random sample of 1,223 Meeting Attendees in Austria, Belgium and Switzerland, as defined below, and surveyed them online. Respondents were screened as follows:
 - 18 years of age or older
 - Meeting attendees must have traveled internationally and/or domestically to attend any of the following types of meetings and events between 2020 and 2023: Fairs, Trade Fairs, Trade Shows or Exhibitions, Conventions or Conferences, Large Corporate Meetings, Association Meetings, Incentive Programs and Seminars or Workshops
- Data for this wave was collected between October 19th and October 25th, 2023.



Statistical Reference

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of Meeting Planners Attendees. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage findings in the report or the data map are as follows:

Segments	Sample Size Wave IV 2023		At or Near 5% or 95%	At or Near 10% or 90%		At or Near 50%
Professional Planners	133	1.4%	2.6%	3.7%	5.4%	7.1%
Meeting Attendees	1,223	0.5%	0.9%	1.2%	1.8%	2.3%

For example, if 51% of all Attendees are attending in-person meetings and the sample size is n=184, using the chart above we can say that at the 95% level of confidence the proportion ranges between 48.7% and 53.3%.



Key Insights Overview

Meeting Attendee Survey Results 2023



Introductory Remarks

This Report presents the outcomes of the fourth and conclusive phase of the European M&C Study by MMGY Travel Intelligence in 2022 and 2023. The primary objective of this study was to comprehensively examine the trajectory of the European meetings and events industry post-Covid and outline the pandemic's repercussions on business meetings and conferences across the continent. Unlike many existing studies in the Meetings and Conventions (M&C) domain that predominantly focus on either planners or attendees, this investigation uniquely compares findings from both perspectives.

In Wave IV, we introduced several modifications to the project. Firstly, in our examination of attendees, which previously covered those from Germany, France, the Netherlands, and the U.K. in Waves I, II, and III, we broadened the survey's reach to include Austria, Belgium, and Switzerland. This expansion enhances the geographical coverage of our study, providing a more holistic understanding of the European M&C landscape.

Secondly, our approach towards planners evolved in Wave IV. Instead of exclusively scrutinizing changes in the M&C marketplace emerging from the pandemic, we adopted a forward-looking view, focusing on specific areas such as forecasting for 2024 and beyond, trends in sustainable meetings and events, wellness considerations, and the impact of global warming on meetings and events, including factors like extreme temperatures and wildfires in popular (meeting) destinations.



Key Takeaways: Attendees

How does Wave IV compare with previous Waves especially when it comes to attendance, meeting formats, sustainability, and wellness considerations.

Attendance: As indicated in Wave III and now confirmed in Wave IV, attendees reveal that they have attended more meetings in 2023 than in 2019. That is an encouraging finding with one caveat: there is a small chance that they might have forgotten a couple of meetings and events they attended 4 years ago. However, the mindset of delegates clearly indicates a positive outlook of current and future attendance of business meetings and events.

Meeting Format: The popularity of in-person events – as expected – is back to pre-pandemic levels. However, virtual and hybrid meetings are here to stay. Delegates have learned the benefits of these events and realize that certain events – certainly those where networking and direct interaction is not necessarily required – are perfectly suitable to attend virtually. In addition, "less travel" is the top priority for the increasing shift towards sustainability, as indicated by attendees. We expect that attendees will continue to favor live events but are likely to add additional events virtually that they were otherwise not be able to take part in and/or in order to lessen their carbon footprint.



Key Takeaways: Attendees

Sustainability, wellness: While live meetings & events may be back to pre-pandemic levels, the pandemic clearly has caused major shifts in the meetings and events industry. The continuing popularity of virtual and hybrid meetings has been mentioned already. But the pandemic has had a major impact on the behaviors of attendees regarding their wellness, mental health, and the awareness of sustainability and sustainable destinations and venues. About 61% of delegates indicate a willingness to pay more to fund environmental and sustainable programs.

Security, safety and geopolitical tensions: These elements are significantly higher in Wave IV than Wave III among "factors affecting the decision to attend a meeting and event". We assume that the ongoing war in the Ukraine and the new crisis in the Middle East are causing these outliers.



Key Takeaways: Attendees

In addition to comparing findings across waves, we also compared the responses from Austria, Belgium, and Switzerland (Wave IV) and those from France, Germany, the Netherlands, and the U.K. (Wave I, II, II). In general terms, the overall findings are rather identical but there are some differences between attendees from the seven countries:

- Likelihood to attend virtual meetings remained similar across the waves, but the likelihood to attend in-person
 and hybrid meetings is significantly down. Attendees from Austria, Belgium and Switzerland may be opting to
 attend virtual meetings when in-person and hybrid are not feasible.
- Attendees from Austria, Belgium and Switzerland are less likely to attend international meetings within Europe
 and outside Europe compared to attendees from France, Germany, the Netherlands, and the U.K. Likelihood of
 attending is highest for domestic and nearby countries, indicating that location has an important impact on
 this group of attendees.
- While still an important initiative, sustainability appears to not be as high a priority for attendees from Austria, Belgium and Switzerland compared to attendees from countries of previous waves. Significantly fewer companies are planning on adding sustainability objectives to their travel policies, though this is impacted by significantly more who already have a plan in place.



Key Takeaways: Planners

How does Wave IV compare with previous Waves especially when it comes to attendance, meeting formats, sustainability, and wellness considerations.

Meeting Format: The popularity of in-person events remains high, with 7 in 10 planners continuing to focus on this meeting format. However, a quarter of planners are also incorporating hybrid and virtual meetings into their plans over the next 2 years. Planners indicate that attendees are more frequently requesting alternative transportation and have a higher need for sustainable meetings, which hybrid and virtual meeting types can help meet. While inperson is still the most preferred, there may be times when attendees are looking to attend a meeting but may not have the time or budget to travel, or simply want a more sustainable option. Hybrid and virtual meeting types can and will continue to meet these needs.

Sustainability and Wellness: Compared to Wave III, there was a significant increase in how much demand planners believe there will be for sustainability in meetings over the next 2 years. More than half say that venues/accommodations that meet sustainability goals are frequently requested by their clients. Four in 10 planners participate or are subscribed to sustainability initiatives, a significant increase from the quarter who did so in Wave III.

Half of planners indicate they have seen a rise of interest in well-being options from their clients over the past year. Locally sourced food and team building activities top the options on client wish-lists, according to planners in Wave IV.



Key Takeaways: Planners

Economic Impact: The biggest factors influencing decision-making for events are the availability of accommodations within the destination, ease of getting to the host destination, safety and security within the host destination and overall costs. These factors are significantly higher than in Wave III, indicating that how a destination meets the needs of a client is more important than overall appeal.

Technology and the changing climate: More than a third of planners have used ChatGPT or other AI tools in their meeting planning role, with the majority using it for idea generation. A third have not used it, but do plan to use it in the future, while the remaining third have no plans to use AI tools within their role as a meeting and event planner.

Overall. planners were not highly affected by the increased temperatures or wildfires in 2023, with only 4% indicating action had to be taken for one or more of their meetings due to these factors. However, even though so few were affected in 2023, 31% believe it definitely will affect destination selection for future meetings and events, and 58% believe it may affect destination selection but won't be a primary factor. Clearly this concern is important for the majority of planners, even if they were not directly affected in the past year.



Key Insights

- / Meetings Formats. The majority of attendees (62%) prefer to attend in-person meetings. However, although only 2 in 10 attendees prefer hybrid or virtual meetings, 4 in 10 attendees say they are likely or extremely likely to attend hybrid or virtual meetings within the next two years. Seven in 10 planners organized in-person meetings, while around a quarter planned virtual and/or hybrid meetings. A possible explanation is that attendees are able to add additional events through technology to their calendar that they otherwise would not be able to take part in. Attendees surveyed in Wave IV are most likely to attend fairs and trade fairs. Education tops the list of reasons to attend events, closely followed by relationship-building, similar to previous waves. Comparatively, planners are most likely to organize conventions or conferences.
- / Meeting Venues and Locations. Germany claims the top spot for past and future meetings for attendees, the most popular international market, and is the most popular location for past meetings from planners. Both planners and attendees are most likely to use hotels and conference venues, while historic venues continue to lose overall appeal for attendees. The trend towards smaller, unique and historic venues- just after the pandemic- seems to be reversed. Most important for attendees is the ease of getting to the meeting location and an interesting conference program.

Key Insights

- / **Bleisure**. The extension of a business trip either before or after the scheduled dates is generally known as bleisure. Four in 10 attendees extended an international business trip for leisure purposes, while a third extended domestic business trips. Two-thirds will invite their spouse/partner along.
- / Economic Impact. While costs, including rising airfares and inflation, are the top concern of attendees, security and safety and geopolitical tensions are of greater concern compared to previous waves. Seven in 10 attendees believe higher airfares and accommodation costs have the biggest impact on their travel behavior. One-third are anticipating shorter business trips and about one-fifth will likely take the train rather than fly. While planners also indicate cost is an important factor when planning meetings and events, their decision-making is also affected by the infrastructure of a destination, including accommodation availability and ease of getting to a destination.
- Sustainability. Six in 10 attendees are willing to pay more to fund environmental and sustainable programs. However, at the top of attendees' wish lists is for their company to request employees to travel less for business. Planners indicate an increased demand for sustainability with meetings, and are more active than ever in sustainability initiatives.

Meeting Planners and Attendees

Demographic and other qualifying information.



Key Insights – Qualifiers

PLANNERS

- More female than male planners
- Forty-percent of planners are between 55-64 years old
- A quarter of respondents are located in Germany, followed by 16% from England
- Nearly a third of planners are corporate meeting professionals
- More than half of respondents have worked in the industry for more than 20 years

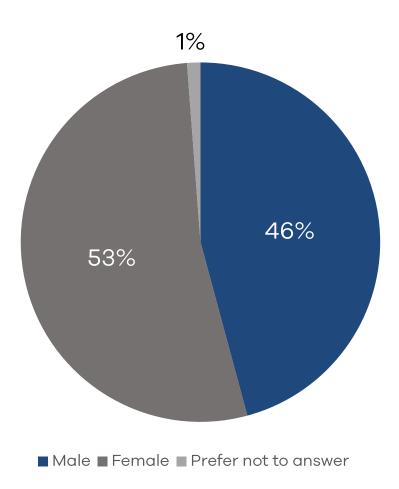
ATTENDEES

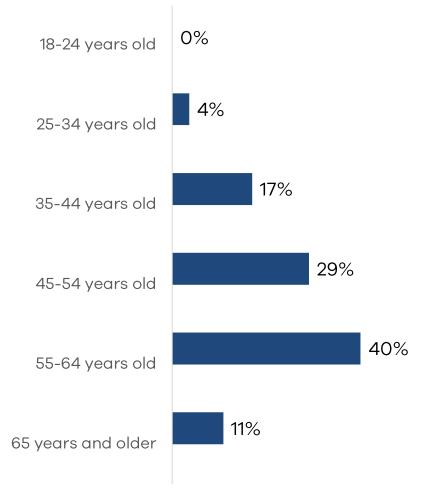
- More male than female delegates.
- Over 25% are between 25 and 34 years old.
- Three-quarters of respondents have attended at least one meeting in 2023, surpassing 2019 attendance.
- Similar to international attendance, domestic attendance is the highest it has been in the last five years.



Planner Respondent Demographics

Nearly two-thirds of Planners are between 45 and 64 years old, and more than half of Planners are female.





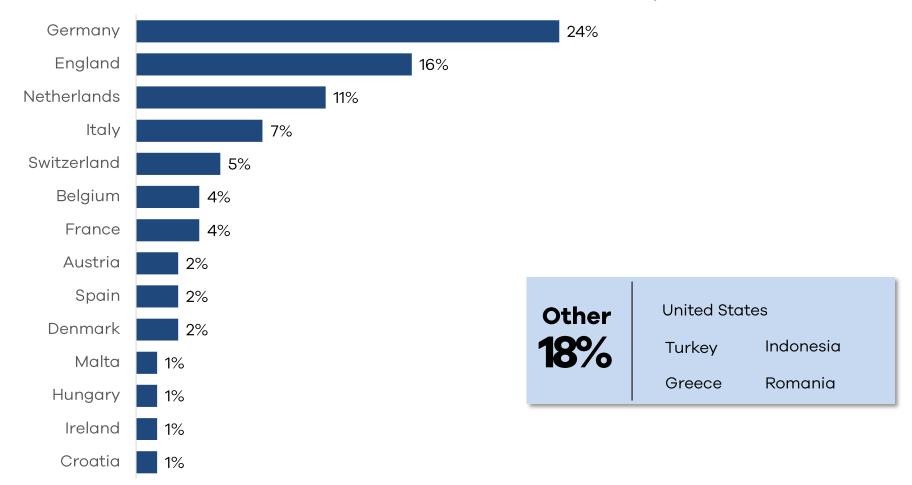
Question: Please indicate your gender / Which of the following categories includes your age?

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Planning Professionals (n=83)



Origin Country of Meeting Professionals

The responses are driven by meeting professionals from Germany and England – the biggest feeder markets for the industry.





Base: Planning Professionals (n=83)

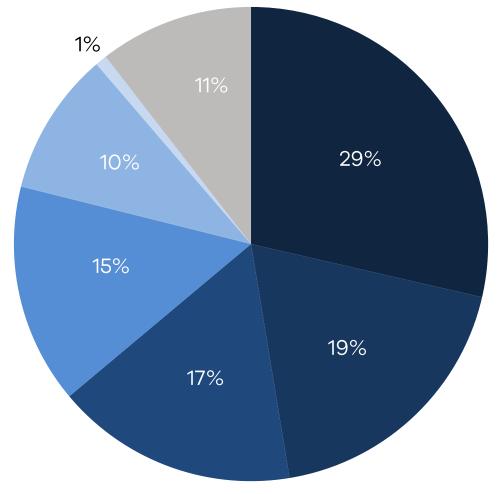


Role of Meeting Professionals

Over a quarter of responses are from corporate meeting professionals, with the second largest segment being independent/third-party meeting professionals.



- Independent/third-party meeting professional
- Conference and convention meeting professional
- Association meeting professional
- Meeting professional
- Government meeting professional
- Other



Question: Which of the following best describes your current role? (Please select only one.)

Base: Planning Professionals (n=133)

Type of Meeting Professionals

Nearly a third of respondents own the event management company or venue finding agency, while 3 in 10 work in-house for the company hosting the event.



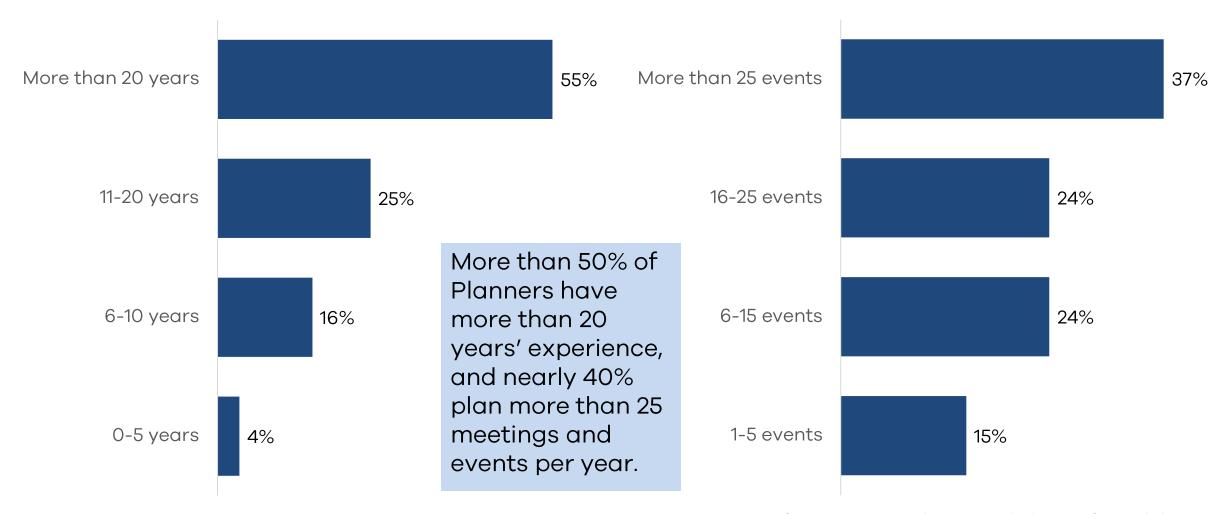
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=83)

Question: In what capacity do you work as a meeting professional? (Please select all that apply.)

Years Worked as Meeting Professional

Number of Meetings and Events Planned per Year

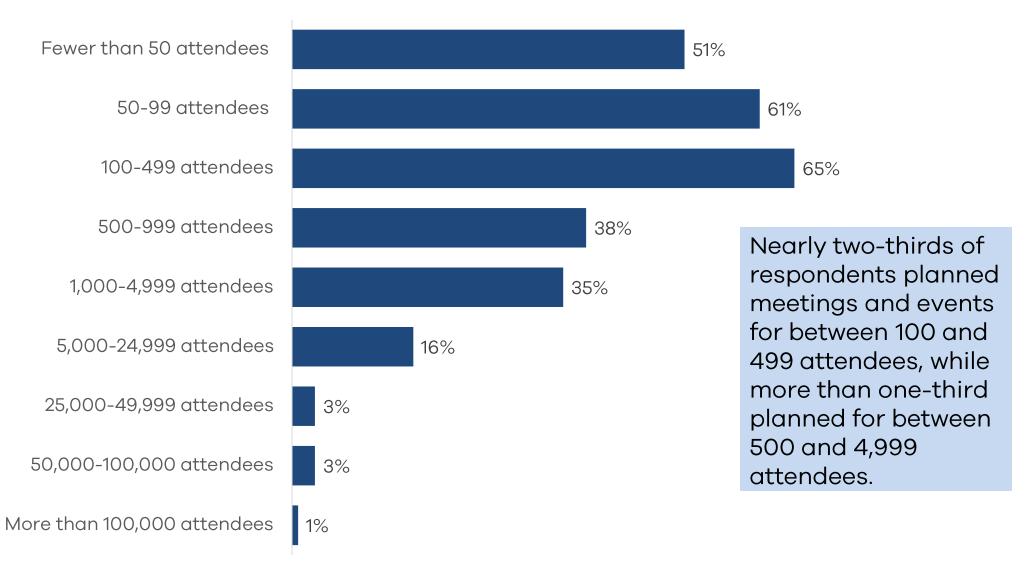


Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n = 83)

Question: How many years have you worked as a Professional Planner? / About how many meetings and events do you typically plan in a year?

Size of Meetings and Events Planned in the Past Five Years



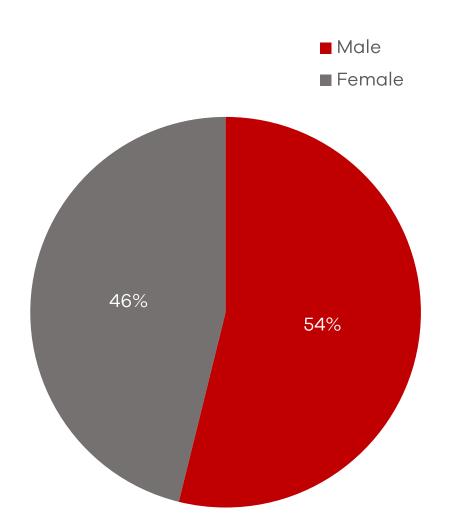
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

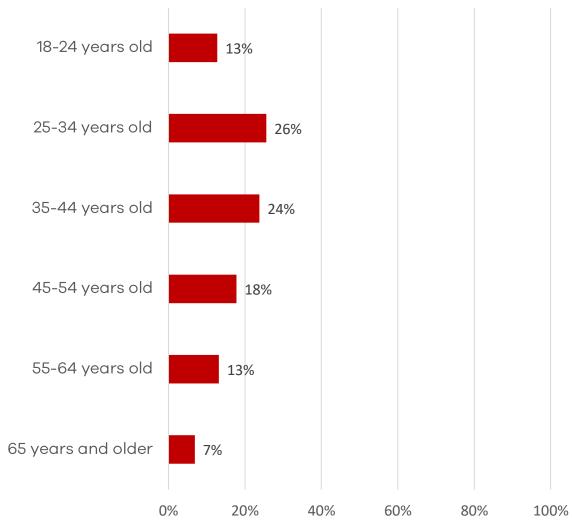
Base: Planning Professionals (n=133)

Question: What size of meetings and events have you planned in the past five years? (Please select all that apply.)

Attendee Respondent Demographics

The majority of attendees are between 25-44 years old.





Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

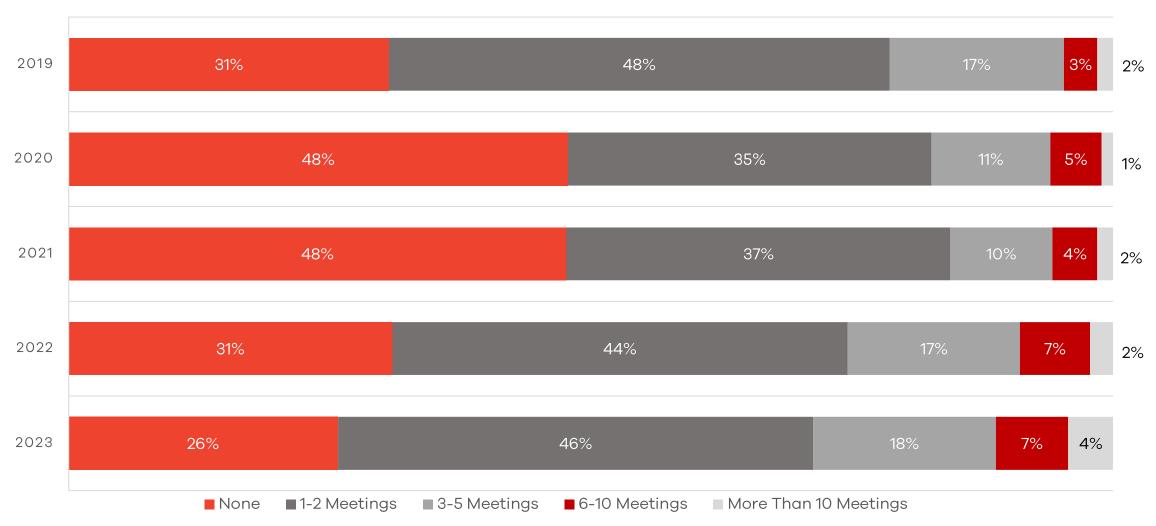
Base: Meeting Attendees (n=1,223)

Question: Please indicate your gender / Which of the following categories includes your age?



International Meeting Attendance

According to attendees, meeting attendance in 2023 will surpass the numbers of 2019.

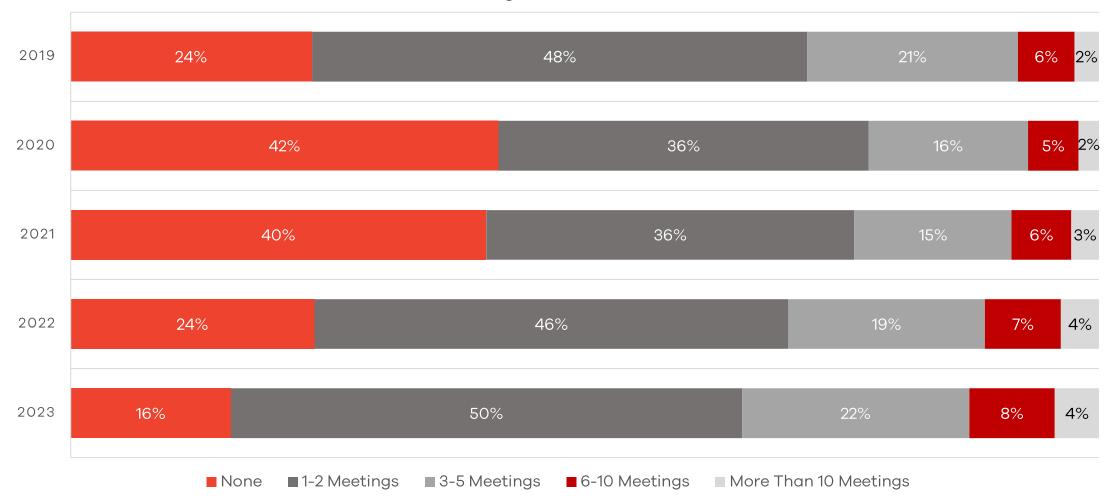


Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Domestic Meeting Attendance

Similar to international attendance, 2023 will trump the 2019 numbers for domestic meeting attendance according to attendees.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)



Meeting Formats

Europe is going back to in-person meetings... but virtual and hybrid meetings are here to stay



Key Insights – Meeting Formats

PLANNERS

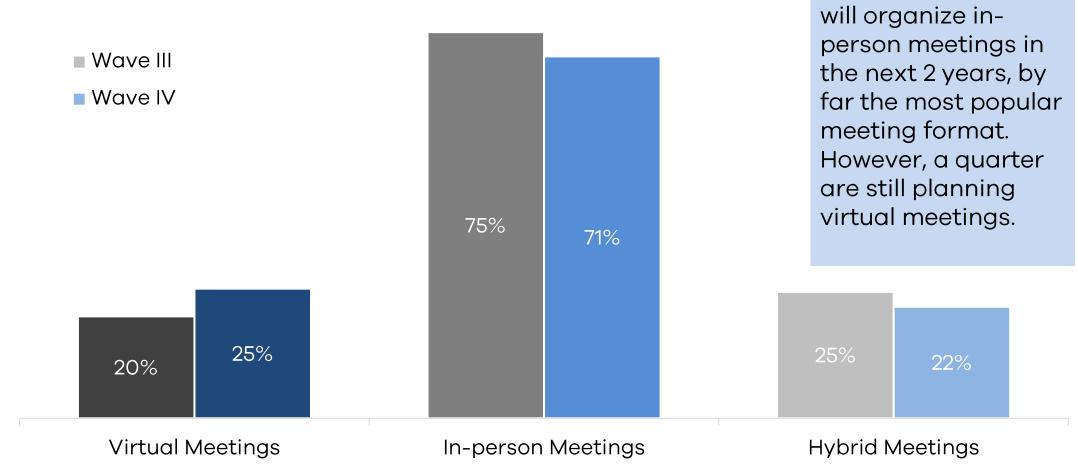
- In-person meetings are back
- More than half of meetings booked are conventions/conferences and seminars/workshops.
- Eight in 10 planners say their clients are looking for interactive sessions and workshops
- More than half of respondents have a lot of influence or decision-making power.

ATTENDEES

- Current meeting preferences are for in-person events.
- In-person events are also perceived as the most effective.
- Many still plan to attend virtual and hybrid meetings as well, even if they are not their preference.
- Education and relationship-building top the list for reasons to partake in an event.
- Fairs and trade shows are the most popular types of meetings attended, followed closely by seminars and workshops.

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Meeting Formats: In-Person Is Back



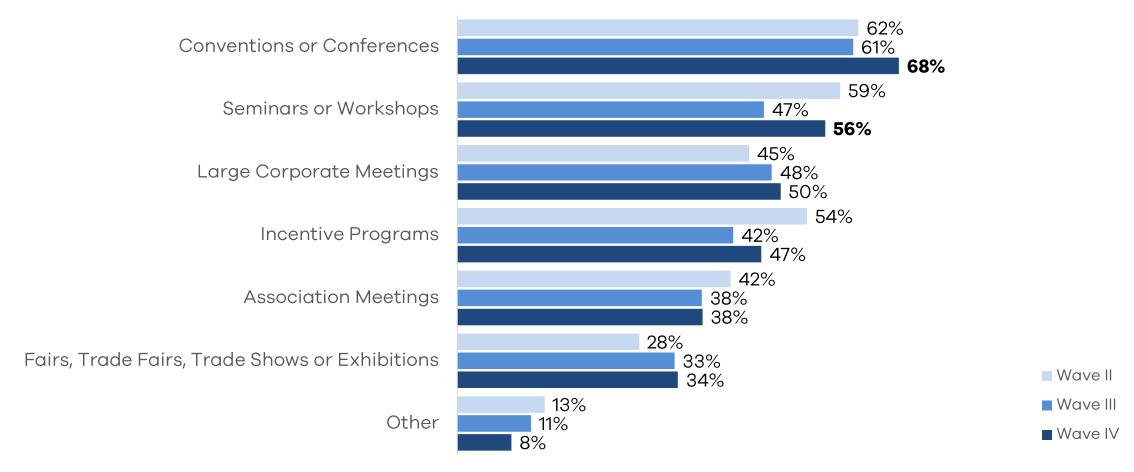
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Planning Professionals (n=101)



Seven in 10 planners

Type of Meetings Booked

Conventions/conferences are the top types of meetings booked; seminars/workshops are booked more than half the time, aligning with smaller groups (below 50 attendees) that are also often booked by Planners.



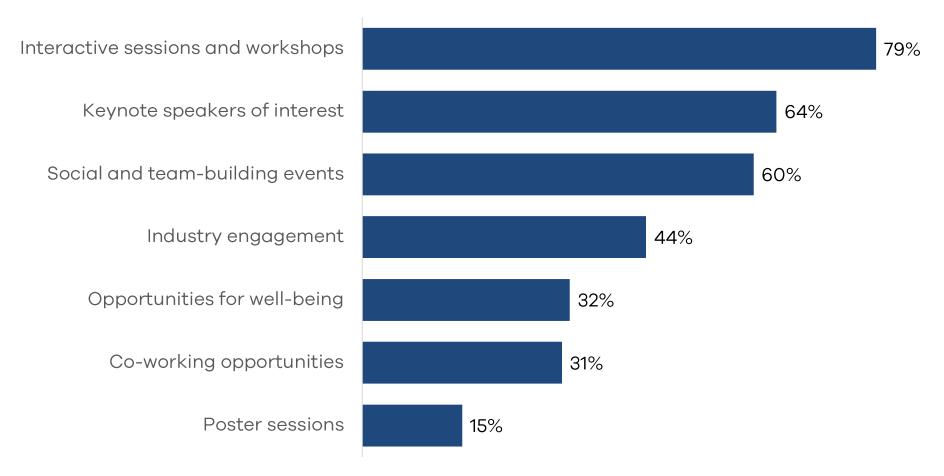
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Planning Professionals (n=133)

Question: Which of the following types of meetings and events do you typically book? (Please select all that apply.)

Top Factors in Meeting Design

The vast majority of planners indicate interactive sessions and workshops are top of mind in meeting design for their clients.

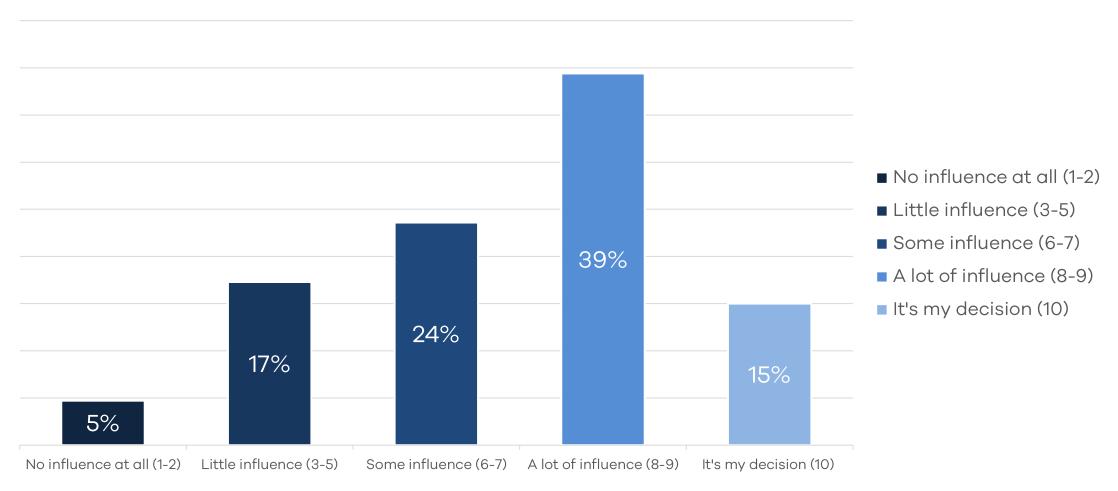


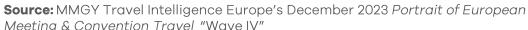
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Planning Professionals (n=85)

Planners' Influence on the Meeting Location

More than half of the respondents indicate that they have a lot of influence over the destination decision. Only 5% have no influence at all over the meeting destination.





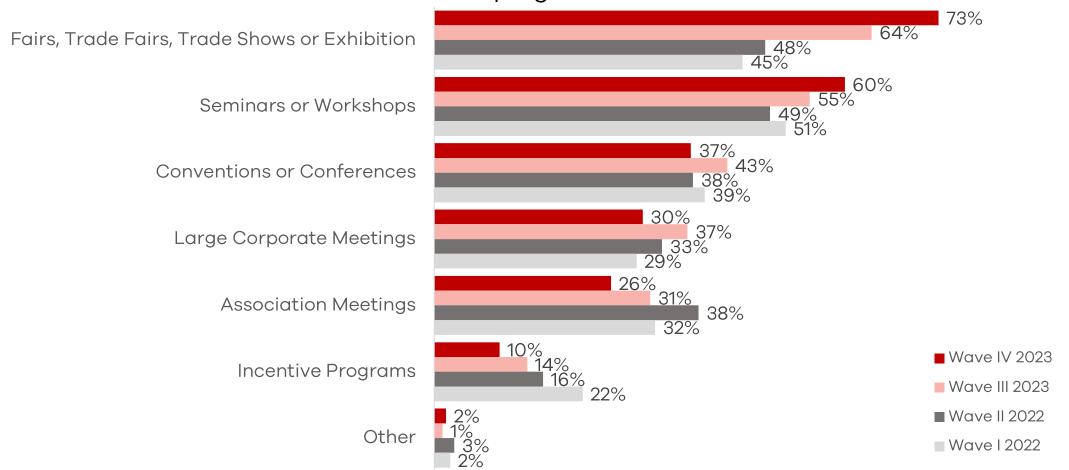
Base: Planning Professionals (n=127)





Type of Meetings Attended

The most frequented meetings are fairs, trade fairs, trade shows or exhibitions, which keep growing in importance. We see a reverse trend for association meetings and incentive programs.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Which of the following types of meetings and events did you attend between 2019 and 2023?

Type of Meetings Attended

Attendees surveyed in Wave IV more frequently attend fairs and trade shows, as well as seminars and workshops, than those surveyed in Wave III.

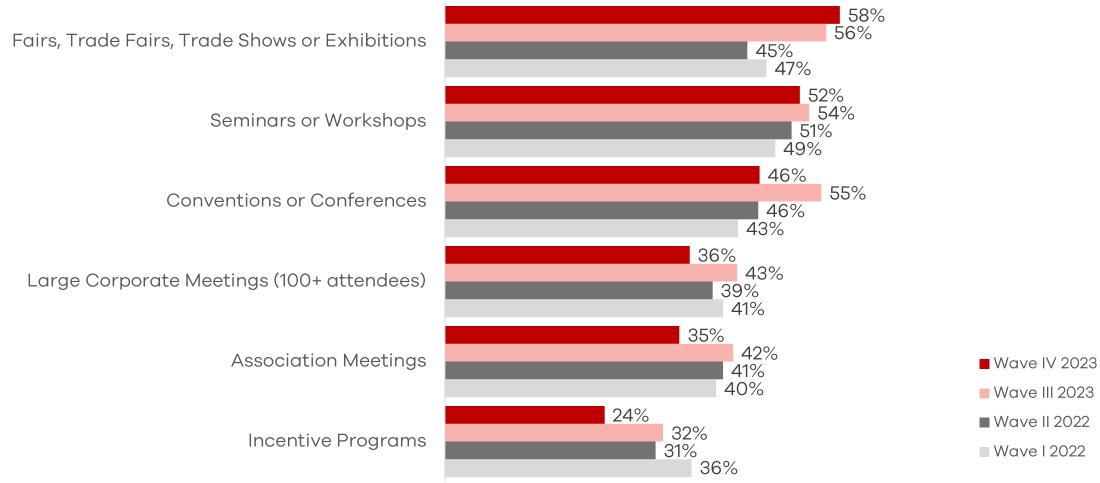
Type of Meeting or Event	Wave III				Wave IV		
LVCIIC	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Fairs, Trade Fairs, Trade Shows or Exhibitions	69%	65%	62%	58%	71%	75%	74%
Seminar or Workshops	43%	66%	50%	59%	67%	53%	59%
Conventions or Conferences	39%	41%	40%	50%	32%	39%	41%
Large Corporate Meetings	31%	38%	40%	38%	27%	34%	30%
Association Meetings	35%	21%	42%	28%	16%	32%	29%
Incentive Programs	8%	15%	13%	19%	9%	7%	13%

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Likelihood of Attending Meetings (Top-2 Boxes)

In the next year, more than half believe it's extremely or very likely that they will attend fairs or exhibitions and/or seminars or workshops.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: How likely is it that you will attend the following types of meetings and events in the next 12 months?

Likelihood of Attending Meetings (Top-2 Boxes)

Attendees surveyed in Wave IV are less likely to attend conventions and large corporate meetings than those surveyed in Wave III.

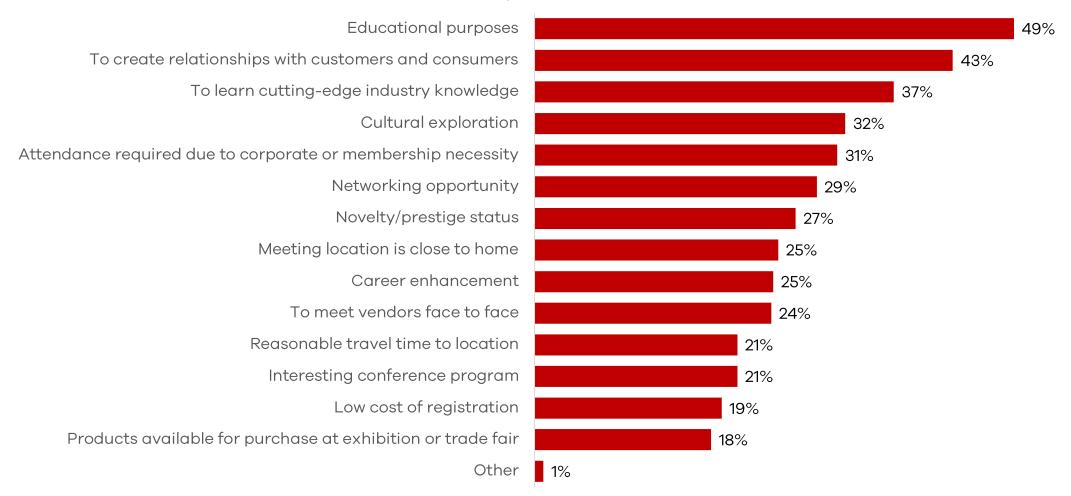
Type of Meeting or Event	Wave III				Wave IV		
LVCIIC	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Fairs, Trade Fairs, Trade Shows or Exhibitions	60%	59%	54%	52%	60%	53%	61%
Seminar or Workshops	43%	65%	47%	60%	58%	47%	51%
Conventions or Conferences	53%	57%	53%	59%	46%	47%	46%
Large Corporate Meetings	42%	47%	39%	44%	35%	36%	37%
Association Meetings	41%	40%	43%	46%	26%	38%	40%
Incentive Programs	32%	35%	27%	36%	21%	24%	25%

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Reasons for Attendance

Education is the main reason for attending meetings and events, very closely followed by the desire to create relationships with customers and consumers.

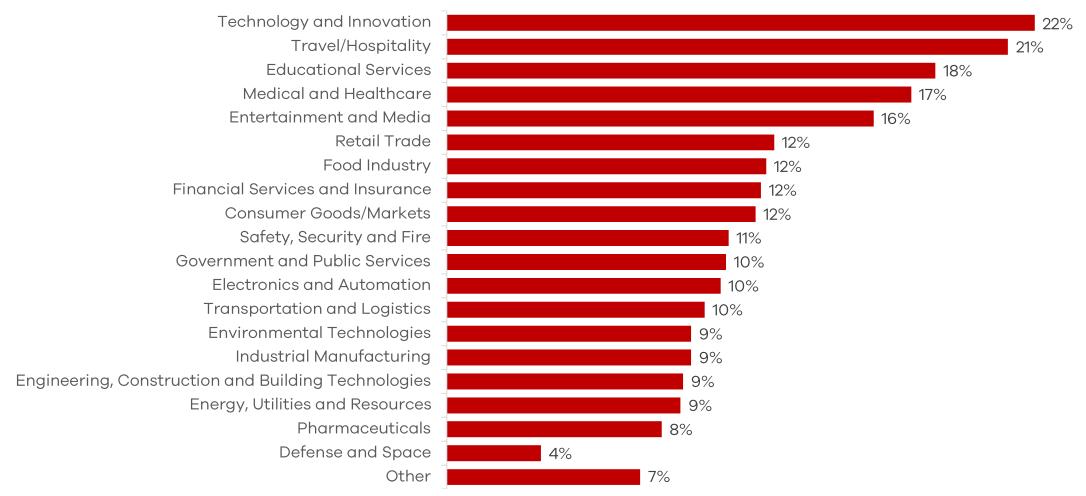


Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Industry Segments

More than one-fifth of respondents have attended meetings or conventions in the technology and innovation or travel/hospitality segments.



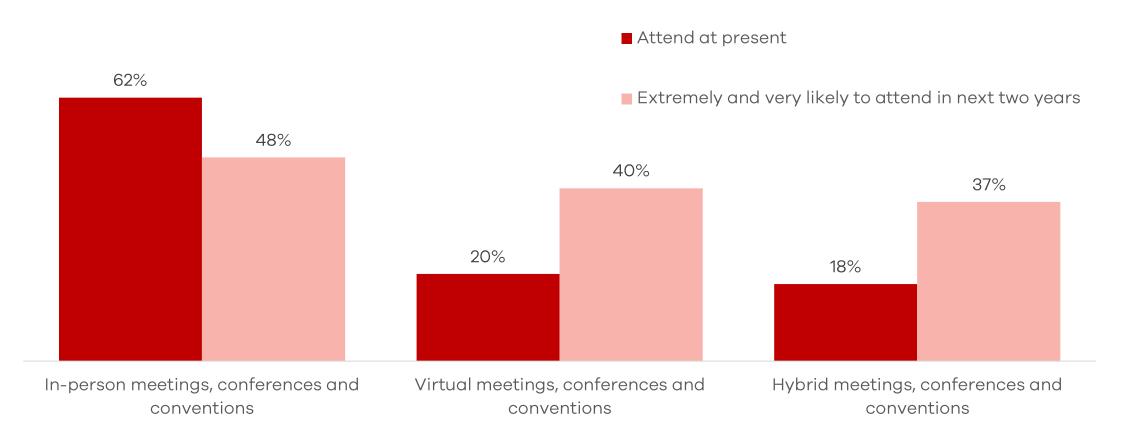
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: In which of the following industry segments have you attended meetings and events since 2019?

Meeting Form Preferences for Attendees

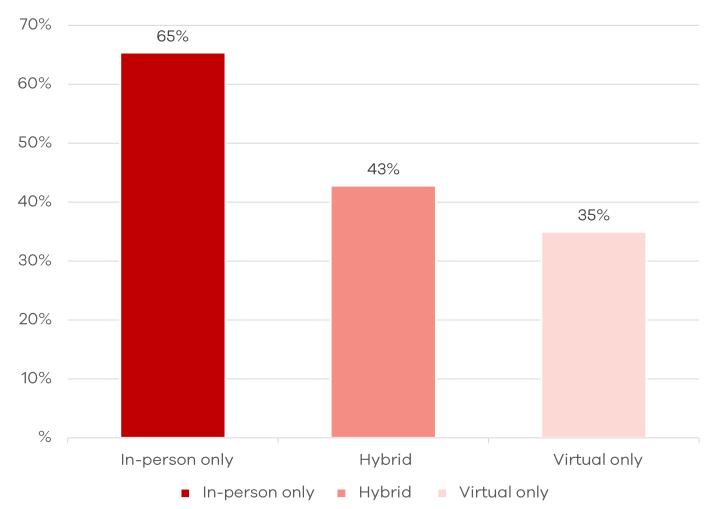
The majority of attendees prefer to attend in-person, and nearly half are very or extremely likely to attend this meeting form within the next two years. However, while respondents do not prefer virtual and hybrid meetings, four in 10 are likely to attend these meeting forms within the next two years.



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Meeting Attendees (n=1,223)

Question: What type of meeting form do you currently prefer to attend? / When traveling for meetings & events, how likely is it that you will attend the following event form in the next 24 months?

In-Person Meetings Are Most Effective



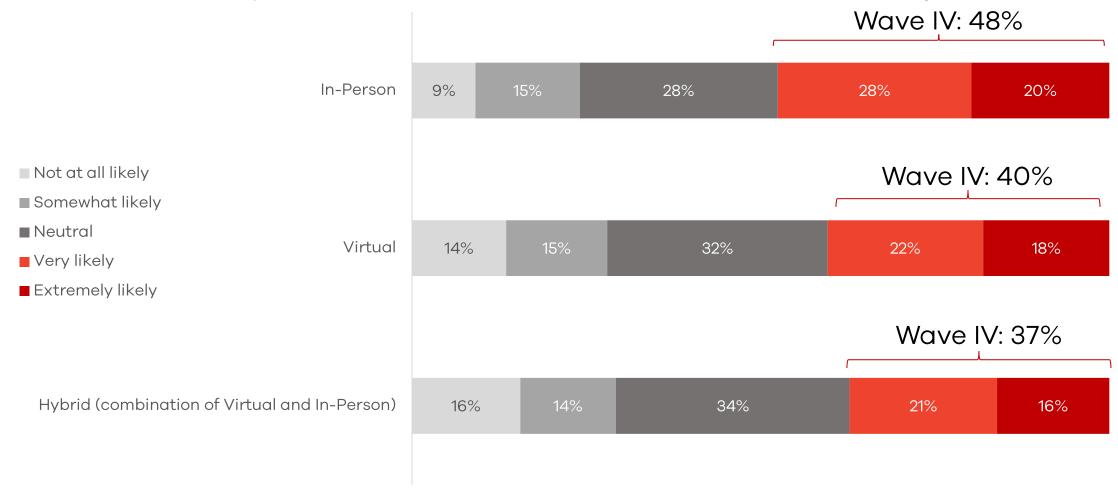
/ Nearly two-thirds of attendees view in-person meetings as effective and significantly more effective than Hybrid and Virtual meetings.

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Question:** Please indicate your overall perception of how effective each of the following types of meeting forms is at delivering the benefits of attending meetings and events in general.



Likelihood to Attend In-Person Meetings Highest for the Next Two Years

However, there is significant interest in virtual and hybrid events as well, giving rise to the assumption that attendees will attend additional events virtually.



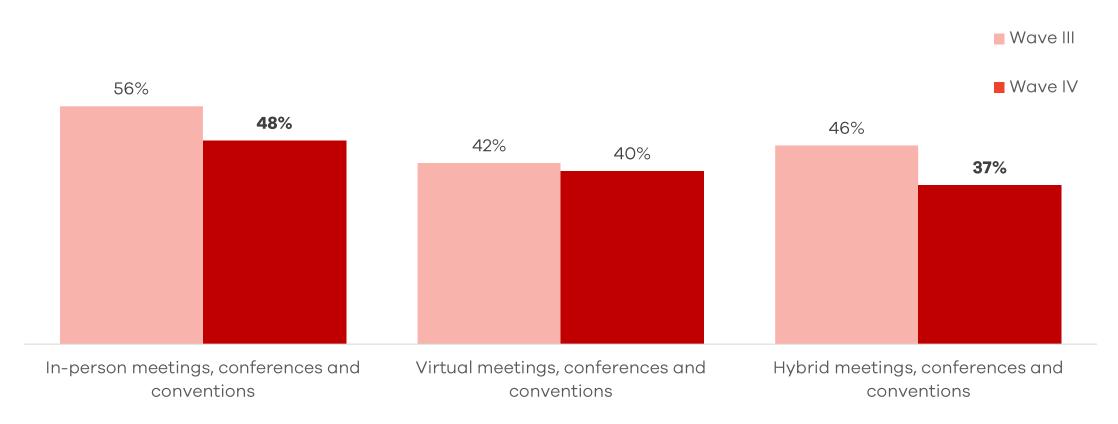
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: When traveling for meetings and events, how likely is it that you will attend meetings offered in the following event form in the next 24 months?

Liklihood to Attend Virtual Meetings is Similar Across Waves

While the likelihood to attend in-person meetings remains the highest out of the meeting forms, it is significantly lower than in previous waves.



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Meeting Attendees (n=1,223)

Question: When traveling for meetings and events, how likely is it that you will attend meetings offered in the following event form in the next 24 months?

Meeting Venues and Locations

Hotels and Hotel Conference Rooms Are Seeing a Revival.



Key Insights – Meeting Venues and Locations

PLANNERS

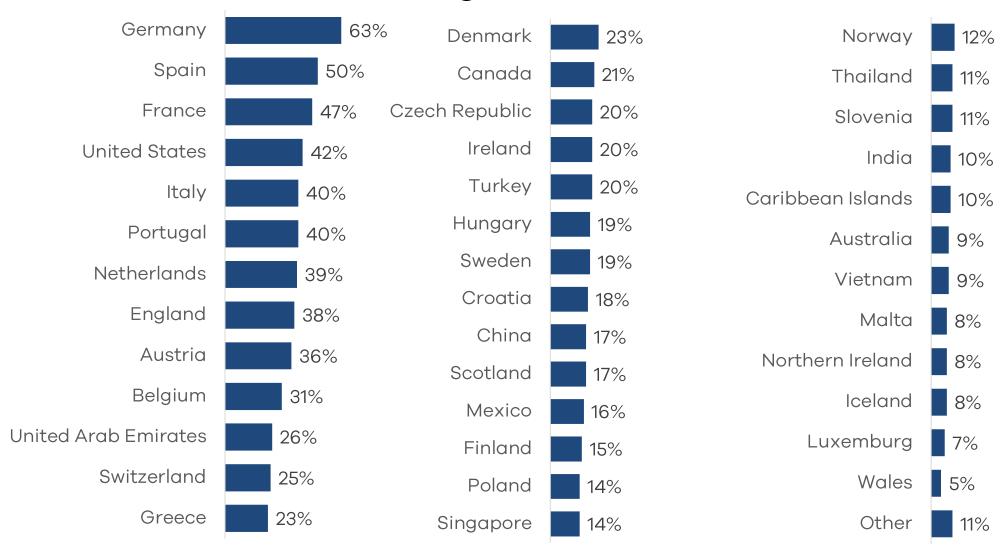
- Compared to the past 5 years, planners are increasingly likely to plan meetings in Spain, Portugal, Switzerland, Sweden, Singapore and Thailand.
- Hotels and hotel conference rooms remain the most popular, though venues unique to the destination rose in popularity compared to Wave III.

ATTENDEES

- Attendees confirm Germany's top spot for past and future meetings.
- Hotels and hotel conference rooms are also rising in popularity for attendees.
- Most important for attendees is the ease of getting to the host destination and an interesting conference program.



Past Meeting and Event Destinations



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=133)

Question: In which of the following destinations have you planned meetings or events in the past five years? (Please select all that apply.)

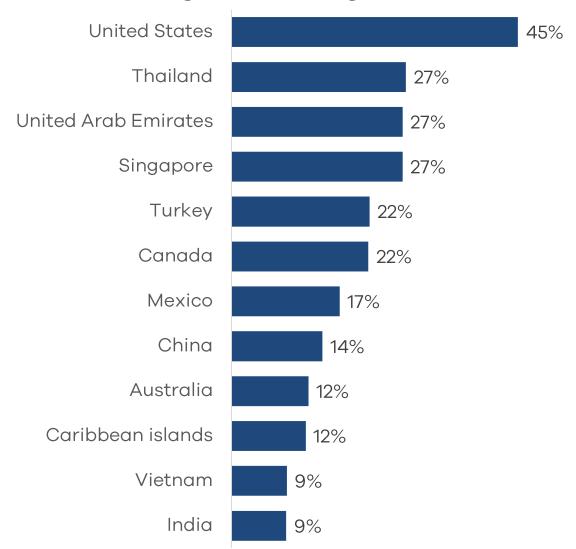
Likelihood of Planning a Meeting in Next Two Years - Europe



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=103); Top-2 Boxes

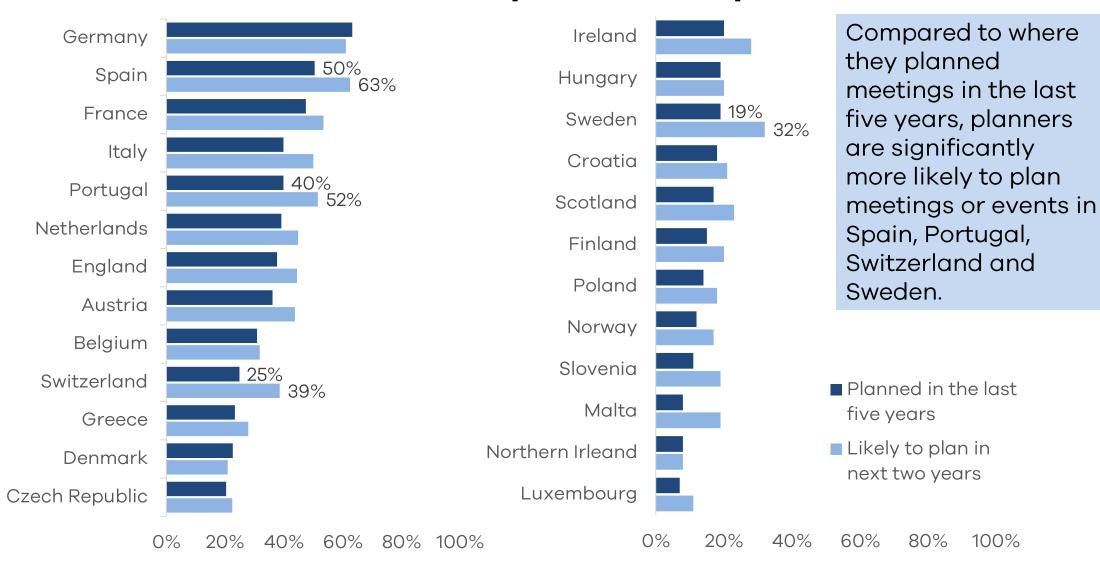
Likelihood of Planning a Meeting in Next Two Years - Rest of World



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=107)

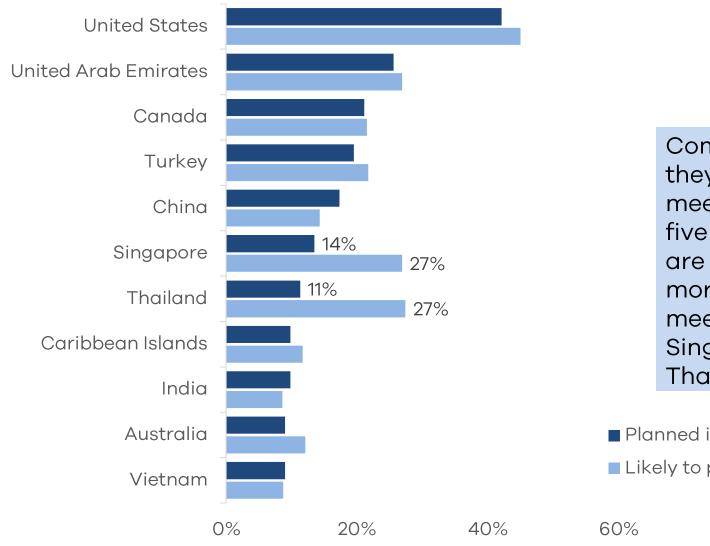
Destination Comparison - Europe



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European

Meeting & Convention Travel "Wave IV" **Base:** Planning Professionals (n=103)

Destination Comparison - Rest of World



Compared to where they planned meetings in the last five years, planners are significantly more likely to plan meetings or events Singapore and Thailand.

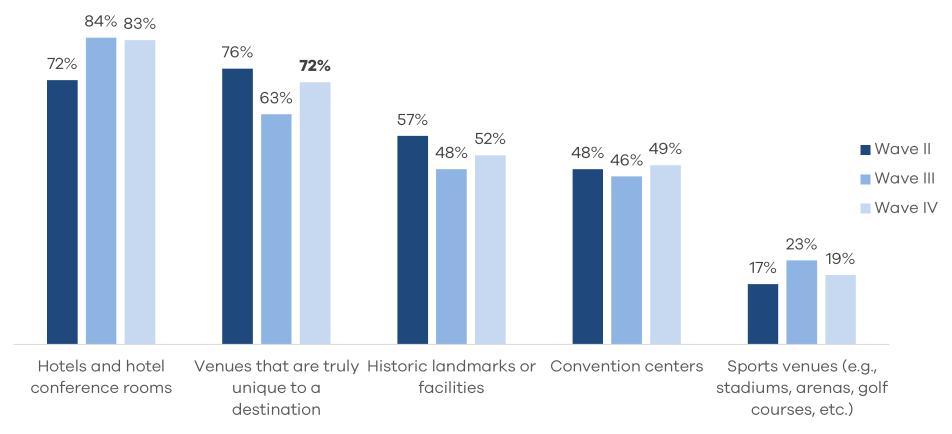
- Planned in past five years
- Likely to plan in next two years

60% 80% 100%

Question: In which of the following destinations have you planned meetings or events in the past five years? (Please select all that apply.)

Today's Appeal and Likelihood of Planning by Venue Type (Top-2 boxes)

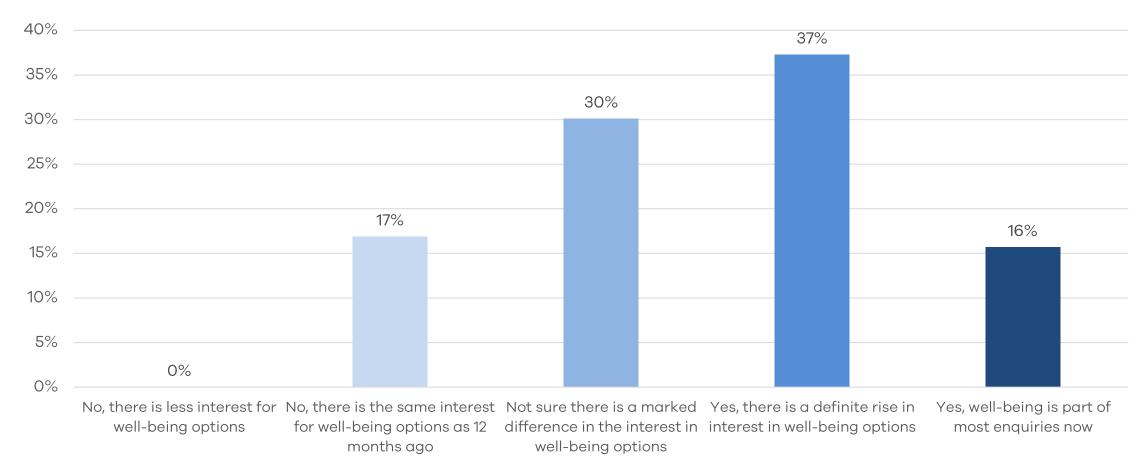
Hotels and hotel conference rooms remain the most popular, while venues truly unique to the destination gained in popularity compared to Wave III in June.



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Planning Professionals (n=114)

Question: Please rate how likely you are to plan a meeting and event in the following types of venues in the next 24 months.

More Than Half of the Respondents Are Seeing a Rise in Interest in Well-Being Options.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

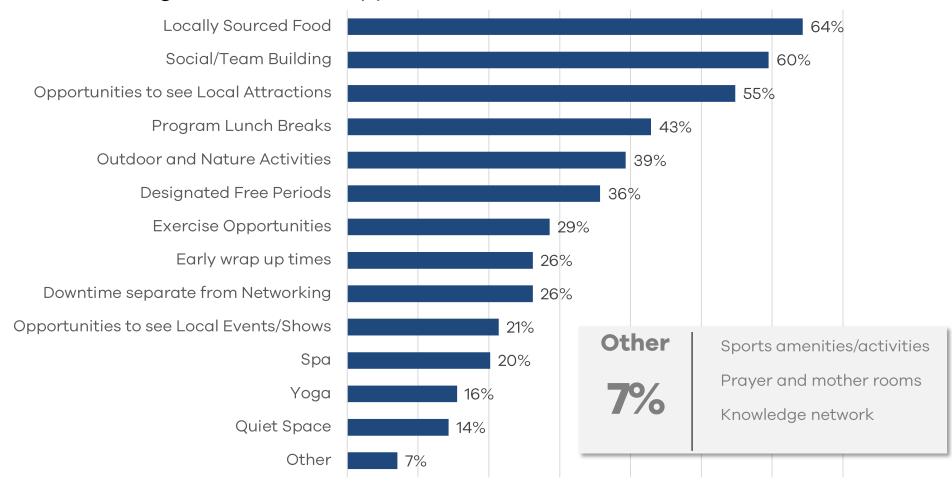
Base: Planning Professionals (n=83)

Question: In your experience over the last 12 months, would you say there is a rise in interest in well-being options during meetings & events?



Well-Being Options on Clients' Wish List

More than half of planners say their clients desire locally sourced food, social and teambuilding activities and opportunities to see local attractions.



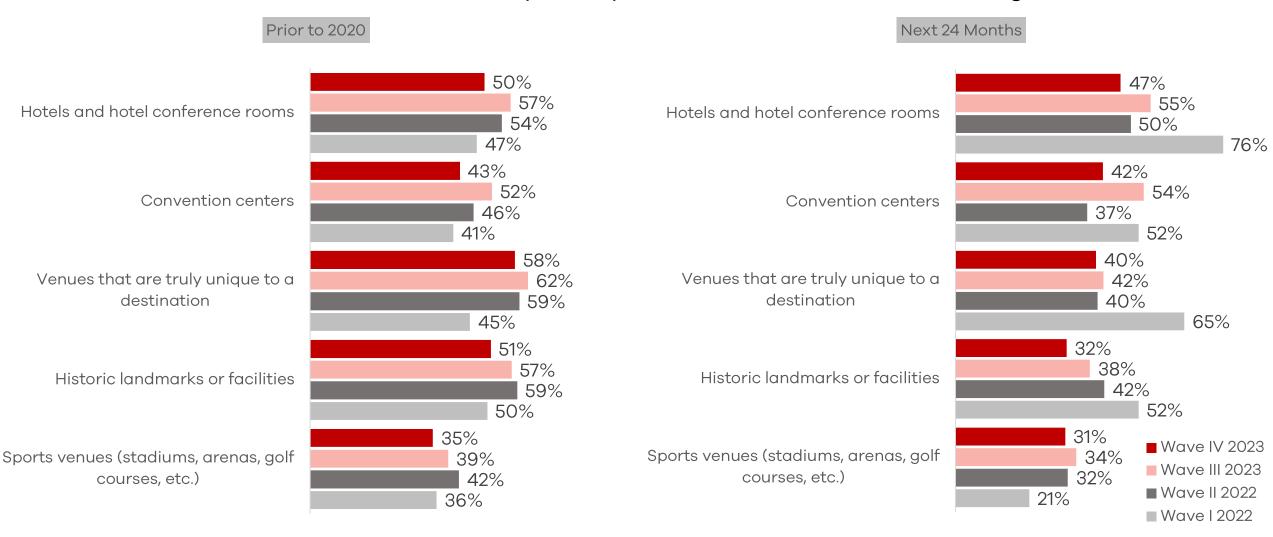
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Planning Professionals (n=84)

Question: Which of the following well-being options are on top of your clients' wish-list for meetings and events? (please select all that apply)

Venue Type: Appeal for Attendees

Attendees are most likely to stay in hotel venues for future meetings.



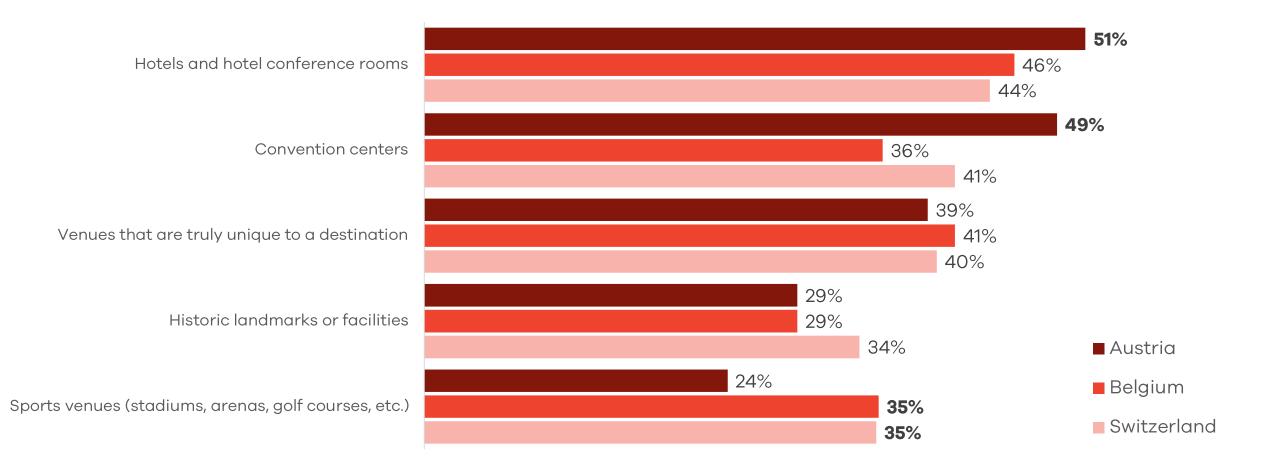
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Meeting Attendees (n=1,223)

Question: Please rate how appealing each venue below would have been to you for a meeting and event you may have attended before 2020. / Please indicate how likely you are to stay in each of the following types of venues for a meeting and event in the next 24 months.

Venue Type: Appeal for Attendees by Country

Austria is driving the use of hotels and convention centers, while Belgium and Switzerland are more likely to utilize sports venues compared to Austria.



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Meeting Attendees (n=1,223)

Question: Please indicate how likely you are to stay in each of the following types of venues for a meeting and event in the next 24 months.

Venue Type: Appeal for Attendees by Country

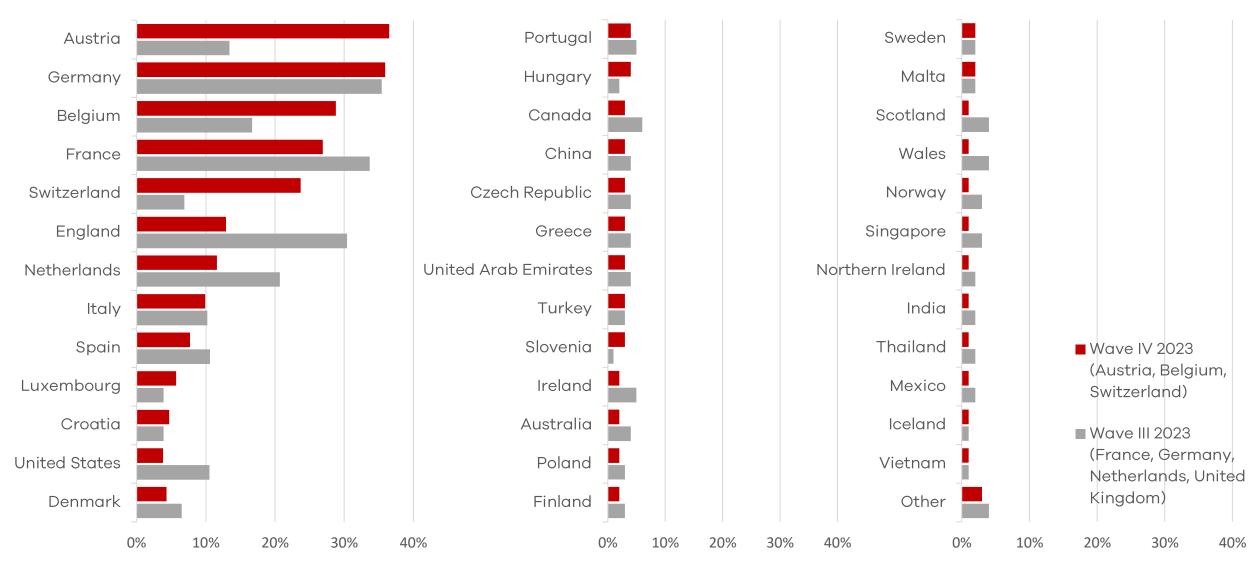
Attendees surveyed in Wave IV are less likely to stay in a convention centers or historical landmarks compared to previous waves.

Venue Type	Wave III				Wave IV			
	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland	
Hotels and hotel conference rooms	52%	57%	53%	61%	51%	46%	44%	
Venues that are truly unique to a destination	45%	48%	36%	39%	39%	41%	40%	
Convention centers	50%	56%	53%	55%	39%	46%	41%	
Historic landmarks or facilities	41%	41%	33%	38%	29%	29%	34%	
Sports venues (stadiums, arenas, golf courses, etc.)	35%	34%	29%	39%	24%	35%	35%	

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV"

Base: Meeting Attendees (n=1,223)

Meetings and Events Destinations by Attendees in the Past Three Years



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Likelihood to Attend Meetings in Next Two Years by Country European Destinations

	Wave III				Wave IV		
Extremely/Very Likely (4-5)	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Germany	44%	80%	37%	36%	47%	31%	47%
Switzerland	31%	40%	18%	19%	25%	16%	81%
Austria	17%	41%	20%	16%	67%	12%	23%
Belgium	37%	25%	38%	26%	9%	74%	15%
France	80%	35%	26%	38%	13%	45%	34%
Netherlands	26%	33%	71%	22%	13%	36%	19%
England	39%	36%	33%	78%	17%	23%	23%
Italy	33%	25%	19%	22%	17%	18%	29%
Spain	36%	29%	23%	28%	15%	20%	21%
Luxembourg	25%	24%	20%	15%	10%	30%	16%
Portugal	24%	19%	16%	18%	9%	11%	17%
Sweden	19%	24%	15%	18%	10%	10%	18%
Czech Republic	11%	21%	14%	14%	16%	10%	10%

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all likely" (1) to "Extremely likely" (5), how likely are you to attend meetings and events in each of the following European destinations in the next 24 months?

Likelihood to Attend Meetings in Next Two Years by Country

European Destinations (cont.)

	Wave III				Wave IV		
Extremely/Very Likely (4-5)	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Norway	18%	19%	17%	16%	8%	11%	13%
Finland	16%	18%	15%	17%	9%	11%	13%
Greece	18%	17%	14%	18%	10%	10%	13%
Denmark	17%	24%	19%	18%	10%	11%	14%
Croatia	14%	17%	15%	12%	14%	10%	11%
Hungary	13%	13%	13%	12%	15%	9%	9%
Slovenia	12%	15%	11%	11%	15%	8%	9%
Ireland	17%	16%	16%	29%	8%	11%	11%
Scotland	17%	17%	15%	38%	8%	9%	13%
Wales	16%	18%	13%	38%	9%	11%	10%
Malta	15%	14%	12%	13%	9%	10%	11%
Northern Ireland	15%	14%	14%	27%	7%	10%	9%
Poland	13%	18%	14%	15%	8%	7%	11%
Iceland	12%	14%	13%	12%	7%	9%	7%

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all likely" (1) to "Extremely likely" (5), how likely are you to attend meetings and events in each of the following European destinations in the next 24 months?

Likelihood to Attend Meetings in Next Two Years by Country

Non-European Destinations

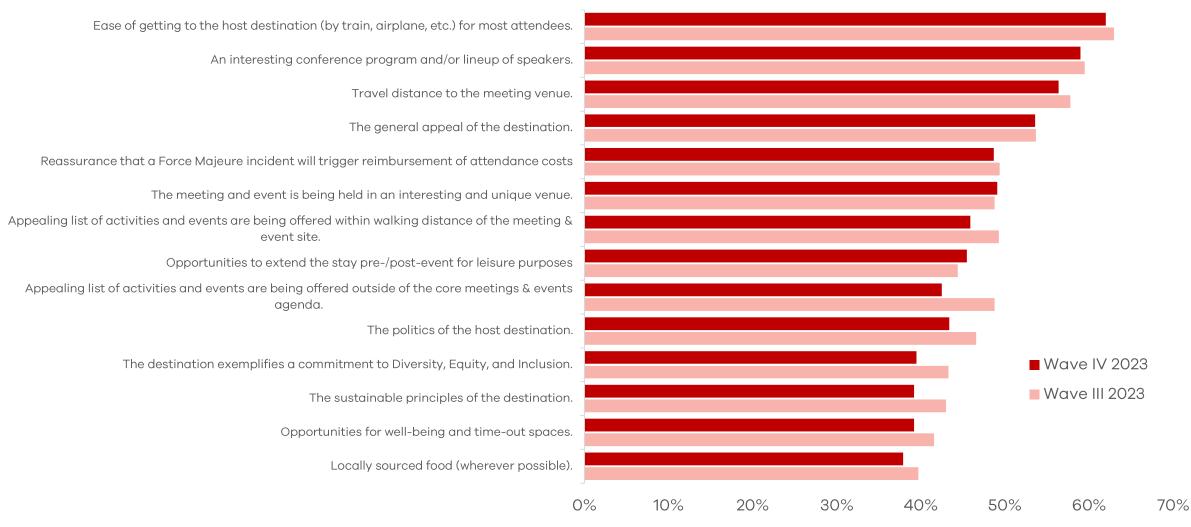
	Wave III				Wave IV		
Extremely/Very Likely (4-5)	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
United States	31%	33%	25%	31%	18%	19%	24%
Canada	23%	19%	18%	20%	8%	14%	16%
United Arab Emirates	14%	19%	17%	20%	11%	12%	16%
Turkey	14%	19%	15%	17%	12%	11%	13%
Australia	15%	18%	15%	19%	6%	12%	11%
Singapore	12%	18%	13%	19%	8%	9%	13%
China	14%	16%	13%	17%	7%	9%	13%
Thailand	15%	14%	12%	15%	8%	9%	11%
Caribbean Islands	14%	15%	16%	14%	6%	9%	12%
India	10%	11%	15%	15%	8%	7%	11%
Mexico	11%	13%	13%	12%	8%	9%	10%
Vietnam	12%	12%	12%	12%	7%	8%	9%

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all likely" (1) to "Extremely likely" (5), how likely are you to attend meetings and events in each of the following non-European destinations in the next 24 months?

Factors Affecting Decision to Attend a Meeting and Event in the Next Two Years (Top-2 Boxes)

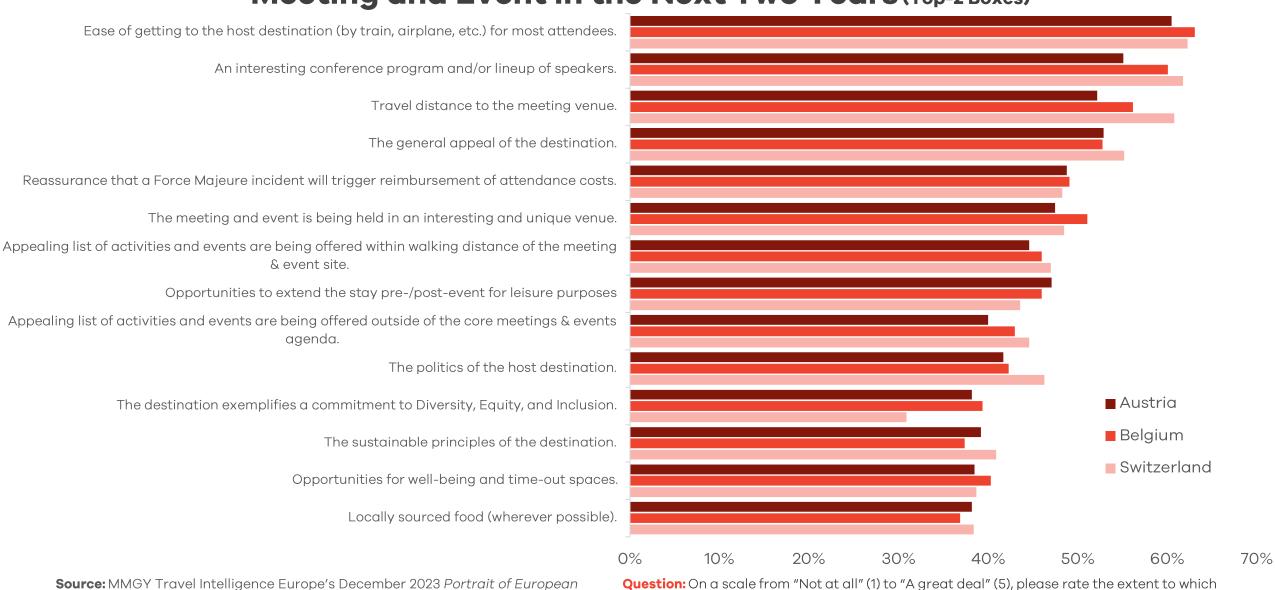


Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all" (1) to "A great deal" (5), please rate the extent to which each of the following factors will affect your decision to attend meetings and events in the next 24 months?

Factors Affecting Decision to Attend a Meeting and Event in the Next Two Years (Top-2 Boxes)



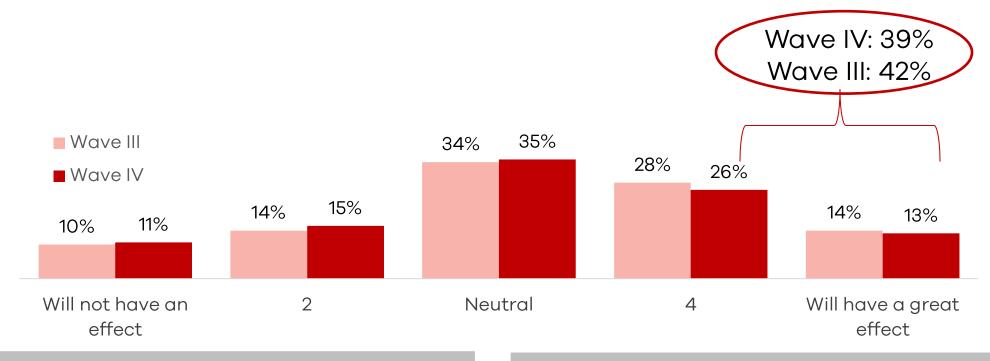
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of Europear Meeting & Convention Travel "Wave IV"*

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all" (1) to "A great deal" (5), please rate the extent to which each of the following factors will affect your decision to attend meetings and events in the next 24 months?

Well-Being and Time-Out Are on the Rise

Thirty-nine percent state that having well-being and time-out options are decision-making factors for meetings and events they consider attending.



Less influence of well-being and time-out spaces on decision-making

More influence of well-being and time-out spaces on decision-making

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "will not have an affect" (1) to "will have a great affect" (5) please rate the extent to which "Opportunities for well-being and time-out spaces" will affect your decision to attend meetings and events in the next 24 months.

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Bleisure

Extending a Business Trip for Leisure Purposes is Popular with More Than Half of Attendees.



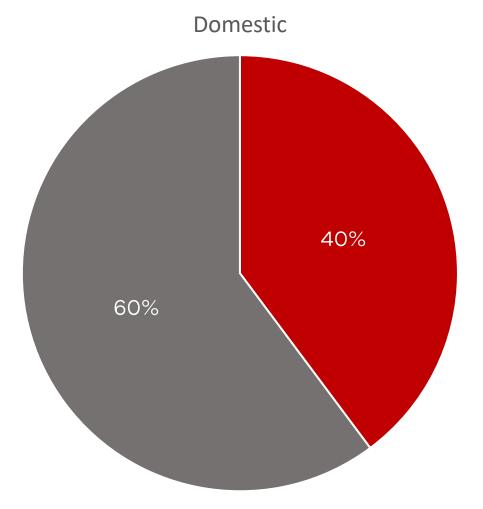
Key Insights – Bleisure

ATTENDEES

- Four in 10 attendees have extended a business trip for leisure purposes.
- Fifty-six percent are at least somewhat likely to extend business trips in the next two years.
- Older Belgium and Austrian attendees are most likely to extend a business trip for leisure, while younger attendees from Switzerland are most likely to extend their stay.



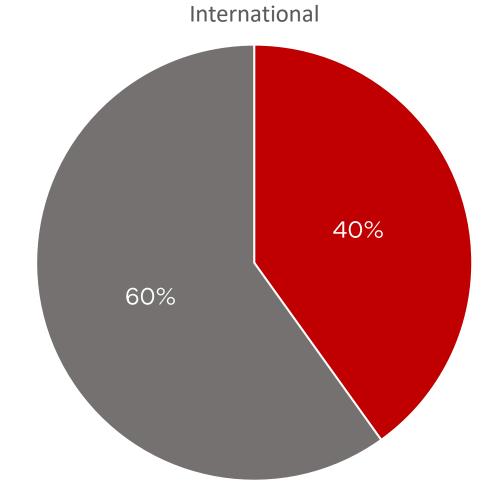
Bleisure: Extending of Business Travel





• No, I attended a meeting and event but never extended the business trip

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Meeting Attendees (n=1,223)

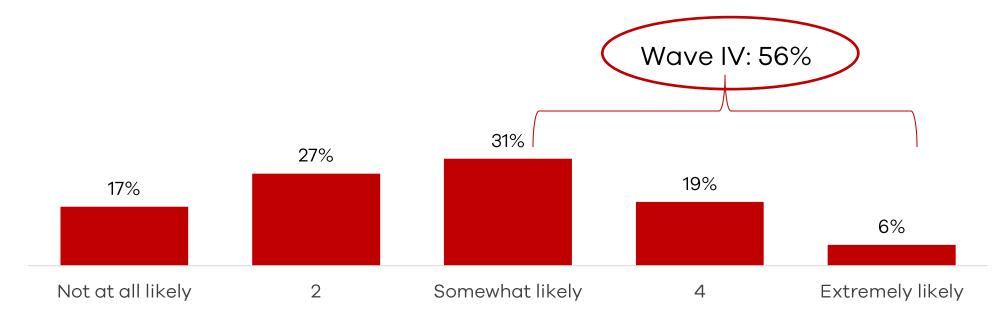


- Yes, I extended a business trip
- No, I attended a meeting and event but never extended the business trip

Question: Have you ever extended a domestic or international business trip, either before or after a meeting and event, for personal/leisure purposes (non-business activities)?

Extending Business Trips in the Next 24 Months

More than half of Attendees are at least somewhat likely to extend their business trips for personal or leisure purposes.



Less likely to extend a business trip

More likely to extend a business trip

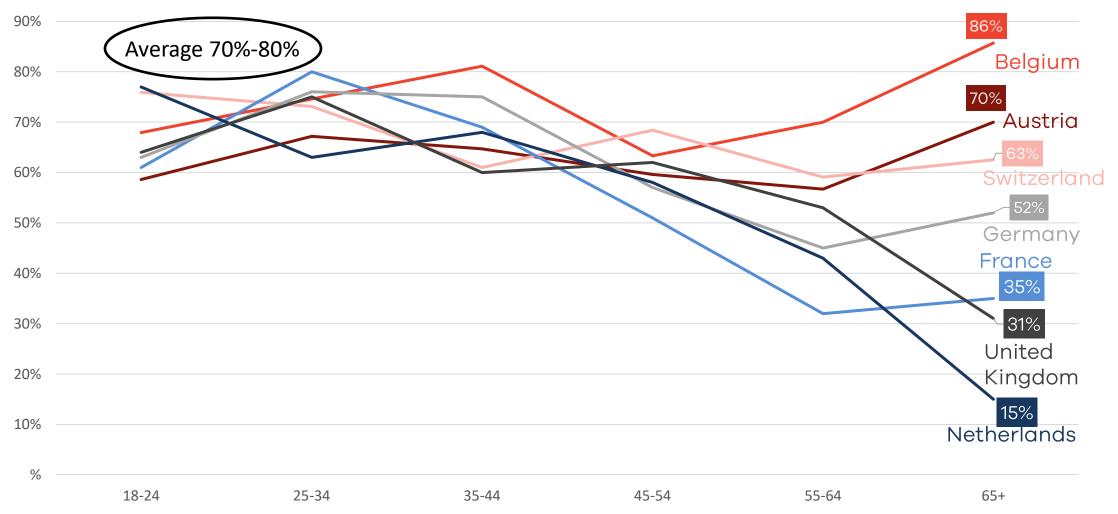
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Question: How likely are you to extend a business trip in the next 12 months, either before or after a meeting and event, for personal/leisure purposes (non-business activities)?





The likelihood of extending a business trip is high for all attendees in the age categories 18 - 44 but tapers off significantly for attendees older than 50 from France, the U.K. and the Netherlands



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Question: How likely are you to extend a business trip in the next 12 months, either before or after a meeting and event, for personal/leisure purpose (non-business activities)?





Economic Impact

Rising costs and economic uncertainty impact planning and booking.



Key Insights – Economic Impact

PLANNERS

- One-third of planners believe the EU meeting and conventions scene has reached pre-COVID/2019 levels, and another third believe it will reach that level in 2024.
- When planning a meeting or event, nine in 10
 meeting planners are affected by
 accommodation availability within a destination
 and the ease of getting to a destination.
- More than a third of planners have used ChatGPT or other AI tools.
- While the majority were not affected in 2023,
 nearly 9 in 10 believe destination selection will be affected by extreme temperatures and wildfires.

ATTENDEES

- Attendees agree that rising costs are their main concern.
- However, attendees surveyed in Wave IV are more concerned with security and safety and geopolitical tensions than attendees surveyed in previous waves.
- One-third anticipate shorter business trips and plan to take a train rather than flying.
- Seven in 10 believe the higher price of accommodations and airfares will have the highest impact on travel behavior.

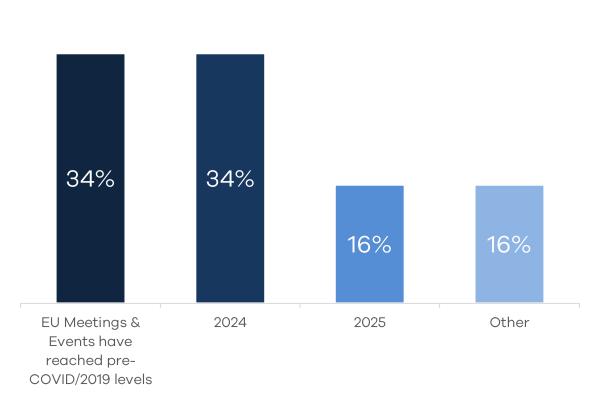


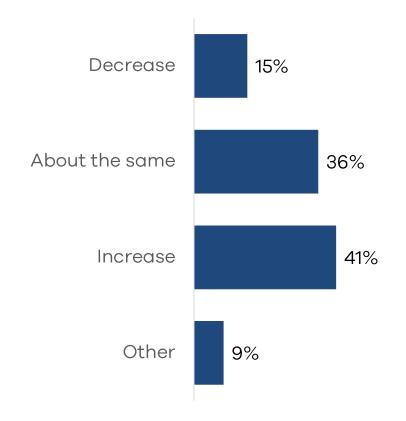
Changes in Meetings in the Next 2 Years

The majority of Planners believe meetings have reached or will reach pre-COVID levels within the next year. Four in 10 Planners believe the number of meetings will increase over the next two years.

When European Meetings & Events will be back to pre-COVID/2019 levels

How meetings will change in 2024 and 2025





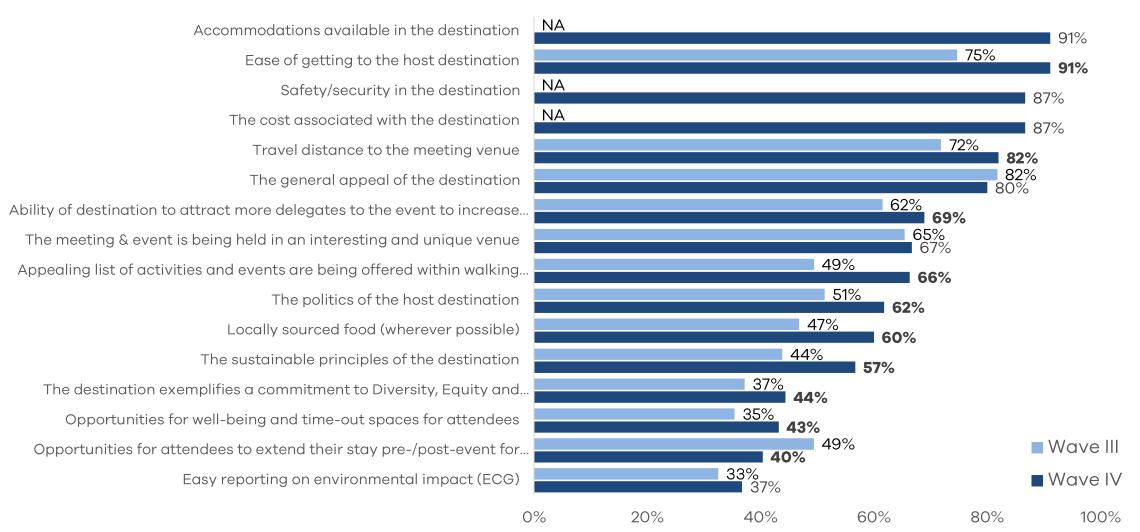
Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Planning Professionals (n=118)

Question: When do you think the European Meetings & Events industry will be back to its pre-COVID/2019 levels? / How do you expect meetings and events to change in 2024 and 2025?



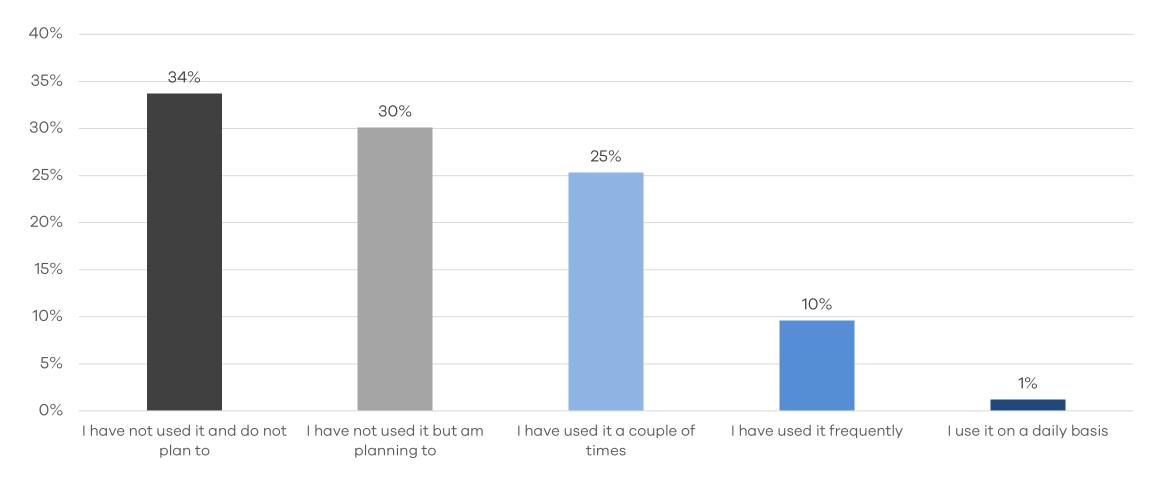
Factors Affecting Decision to Plan a Meeting and Event in the Next Two Years (Top-2 Boxes)



Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Planning Professionals (n=90)

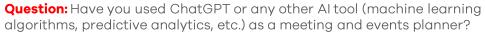
Question: On a scale from "Not at all affected" (1) to "A great deal affected" (5), please rate the extent to which each of the following factors you believe will affect your decision to plan meetings and events in the next 2 years?

More Than a Third of Planners Have Used ChatGPT or Other AI Tools Within Their Role.



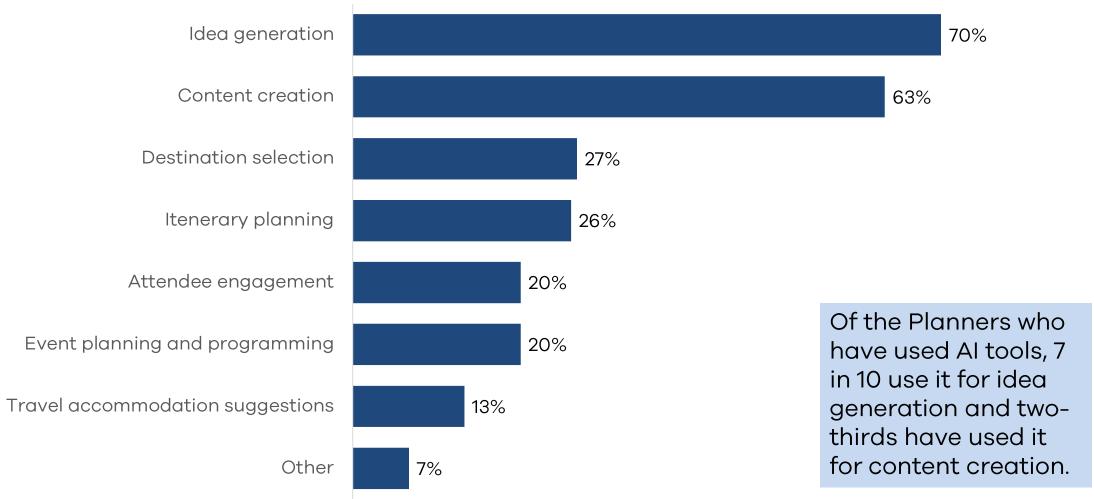
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=83)



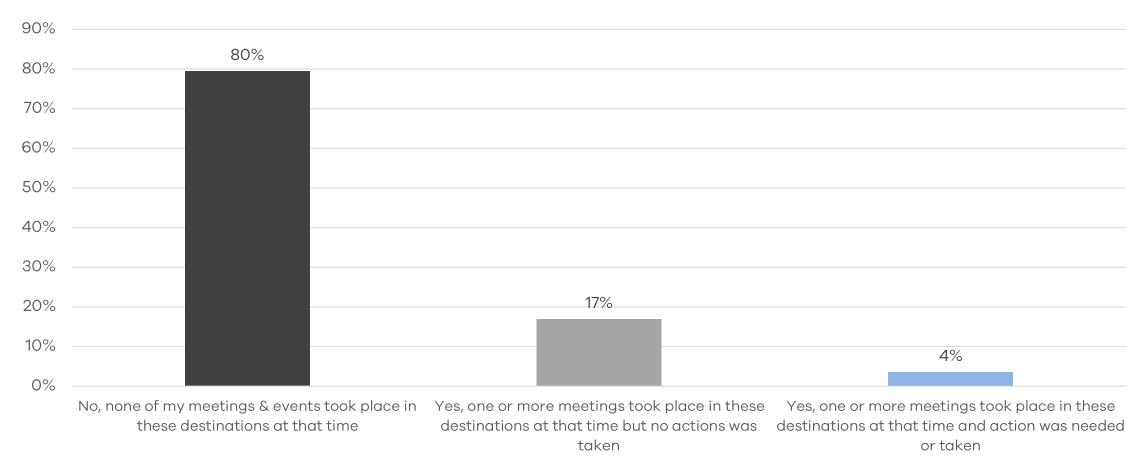


What Planners Use AI Tools For



*Sample size is very small, analyze with caution **Source:** MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "*Wave IV" **Base:** Planning Professionals (n=30)

Planners Were Not Highly Affected by Wildfires and Extreme Temperatures in 2023.



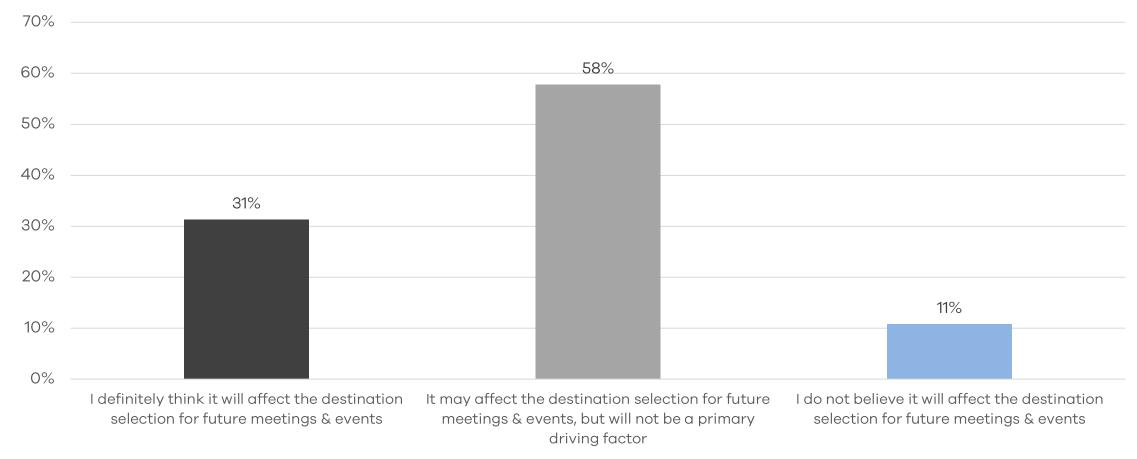
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=83)

Question: In 2023, more frequently than in years prior, there were extreme temperatures and wildfires in certain European and global destinations. Did any of your planned meetings & events take place in those destinations at that time and did you need to take any action?



While Most Planners Indicate That Destination Selection Was Not Affected by Extreme Temperatures or Wildfires in 2023, close to 90% believe it may do so in the Future .



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

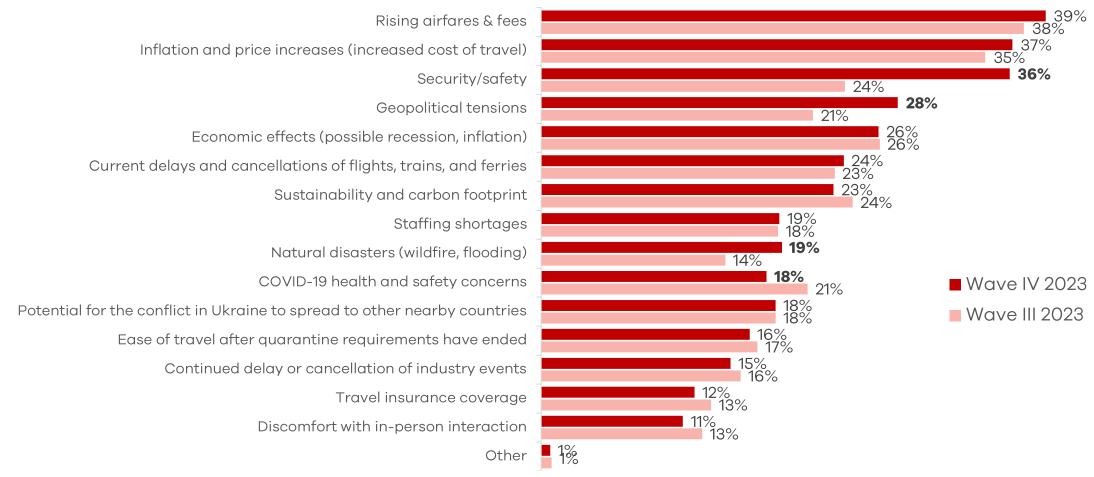
Base: Planning Professionals (n=83)

Question: Would you say that extreme temperatures, weather events and wildfires have or will affect the destination selection for future meetings & events?



Current Factors Affecting Decision to Attend a Meeting and Event

Compared to attendees surveyed in Wave III, Wave IV respondents are significantly more affected by security/safety and geopolitical tensions.



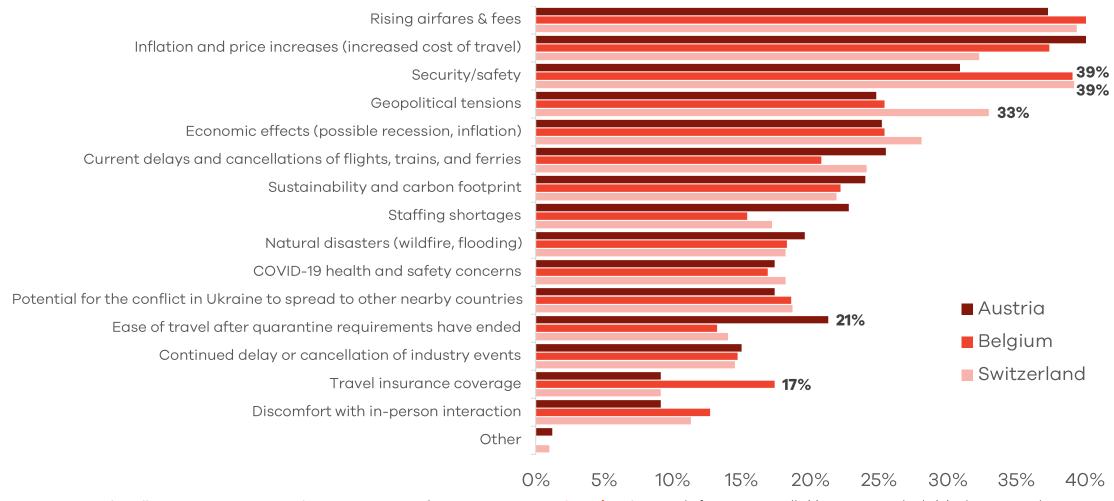
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all" (1) to "A great deal" (5), please rate the extent to which each of the following factors will affect your decision to attend meetings and events in the next 24 months?

Current Factors Affecting Decision to Attend a Meeting and Event

Of the attendees surveyed, attendees from Switzerland are the most concerned for security/safety and geopolitical tensions.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: On a scale from "Not at all" (1) to "A great deal" (5), please rate the extent to which each of the following factors will affect your decision to attend meetings and events in the next 24 months?

Anticipated Changes in Travel Behavior for Attendees in Next 12 Months

Shorter trips and utilizing the train remain the most common anticipated behaviour for attendees in Wave IV.

Type of Meeting or Event		Wa	ve III	Wave IV			
	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Shorter trips	29%	32%	29%	26%	35%	31%	38%
Taking the train rather than a flight	27%	27%	28%	23%	28%	30%	35%
Earlier booking	31%	23%	19%	21%	27%	26%	31%
Book all-inclusive	28%	23%	18%	15%	23%	23%	21%
Taking fewer business trips	23%	21%	23%	27%	22%	19%	25%
More combined business/leisure trips	17%	16%	17%	20%	20%	20%	19%
Trading down in accommodation	19%	18%	17%	23%	20%	17%	20%
Trading up in accommodation	12%	18%	14%	11%	20%	14%	16%
Trading down in air transportation	16%	17%	20%	18%	13%	16%	16%
Trading up in air transportation	12%	17%	12%	10%	16%	13%	12%
Preference for rental accommodations vs. hotels/motels	16%	16%	16%	16%	12%	16%	14%
Postponing trips	18%	18%	18%	13%	11%	15%	15%
Cancelling trips with no plan to reschedule	13%	13%	10%	11%	12%	11%	9%

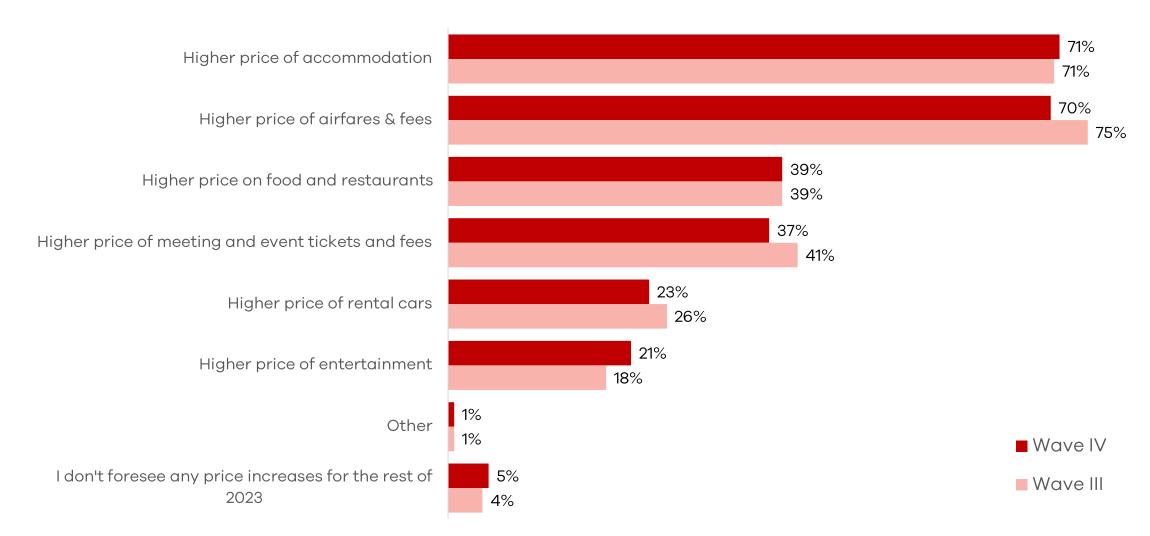
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European

Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Please indicate how you expect your behavior when traveling for meetings and events to change in the next 12 months?

Negative Impact on Attendee Meeting Travel Expenditures in 2023 Due to the Economic Uncertainties



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Due to the economic uncertainties, select the top three (3) categories you anticipate having the greatest negative impact on meeting and event travel expenditures for the rest of 2023.

Negative Impact on Attendee Meeting Travel Expenditures in 2023

The higher prices of accommodations and air fares remain the most impactful on meeting attendance.

Type of Meeting or Event		Wa	ve III	Wave IV			
	France	Germany	Netherlands	United Kingdom	Austria	Belgium	Switzerland
Higher price of accommodation	71%	71%	67%	74%	74%	72%	68%
Higher price of air fares & fees	77%	71%	69%	81%	67%	75%	69%
Higher price on food & restaurants	36%	42%	40%	38%	40%	35%	41%
Higher price of meeting and event tickets & fees	42%	40%	38%	43%	36%	38%	39%
Higher price of rental cars	29%	27%	23%	23%	21%	26%	23%
Higher price of entertainment	18%	20%	18%	17%	20%	21%	23%

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Due to the economic uncertainties, select the top three (3) categories you anticipate having the greatest negative impact on meeting and event travel expenditures for the rest of 2023.



Sustainability

Attendees are recognizing the importance of sustainability for meetings, and planners confirm the trend.



Key Insights – Sustainability

PLANNERS

- Planners believe demand for sustainable meetings will increase significantly over the next two years.
- More than half of planners say that clients request to select venues that meet sustainability goals and encourage alternative transportation over air travel.
- More than half of planners check hotels and venues for sustainability credentials.

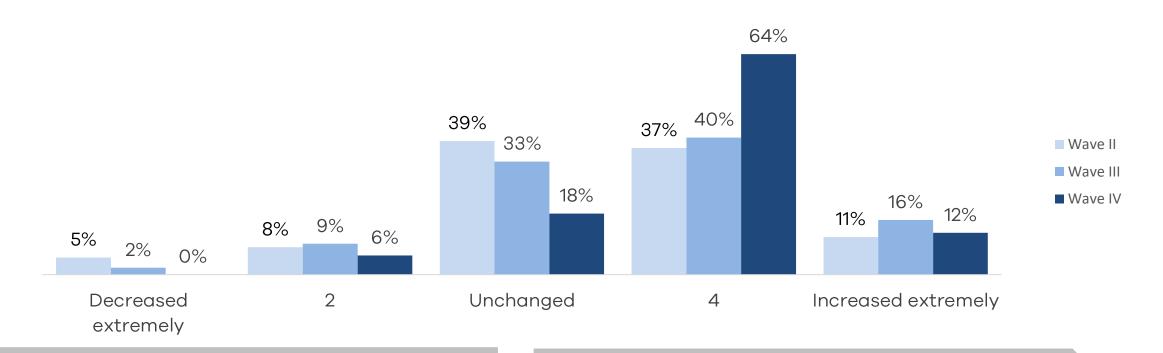
ATTENDEES

- Sustainability for meetings remains important for attendees.
- Nearly two-thirds are willing to pay more for sustainable meetings.
- Nearly one-third of respondents from Belgium say their company is planning on adding sustainability objectives to their policies.
- One-third would like their company to request employees to travel less for business.



Demand for Sustainable Meetings

Planners see a significant increase in sustainability demand.



Less demand for more sustainable meetings and events

More demand for more sustainable meetings and events

Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European*

Meeting & Convention Travel "Wave IV" **Base:** Planning Professionals (n=90)

Question: In general, how will the demand for booking sustainable meetings and events change in 2024 and 2025 compared to the past 2 years?



54%

of Planners are asked to select venues and accommodations that meet sustainability goals.

Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European

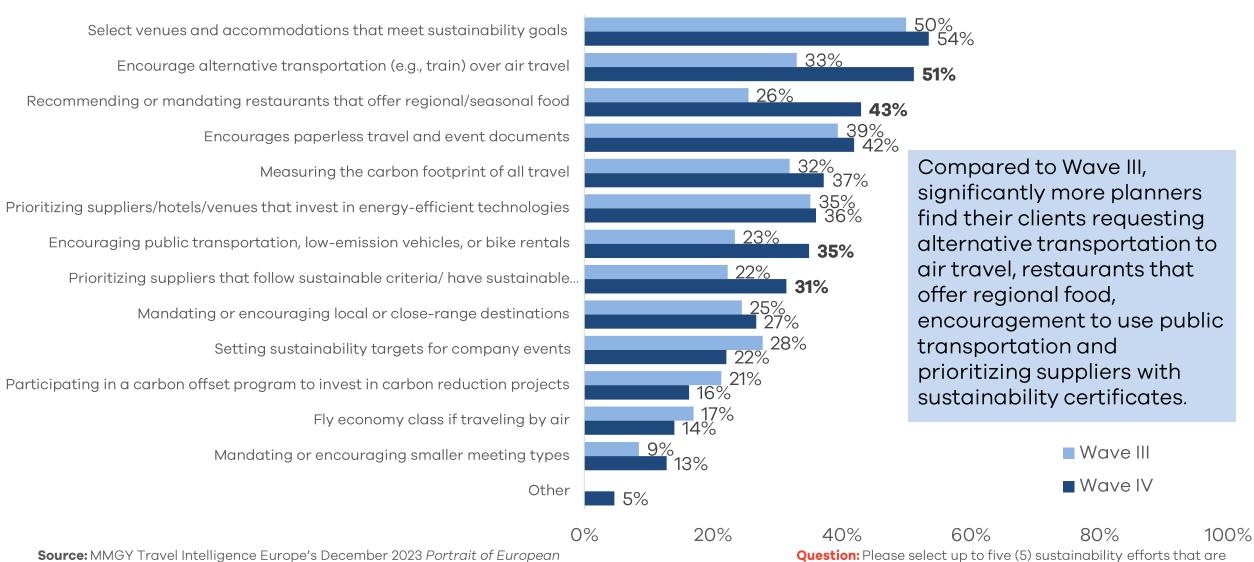
Meeting & Convention Travel "Wave IV"

Base: Planning Professionals (n=90)

Question: Please select up to five (5) sustainability efforts that are most frequently requested when booking a meeting and event?



Sustainability Efforts Most Frequently Requested

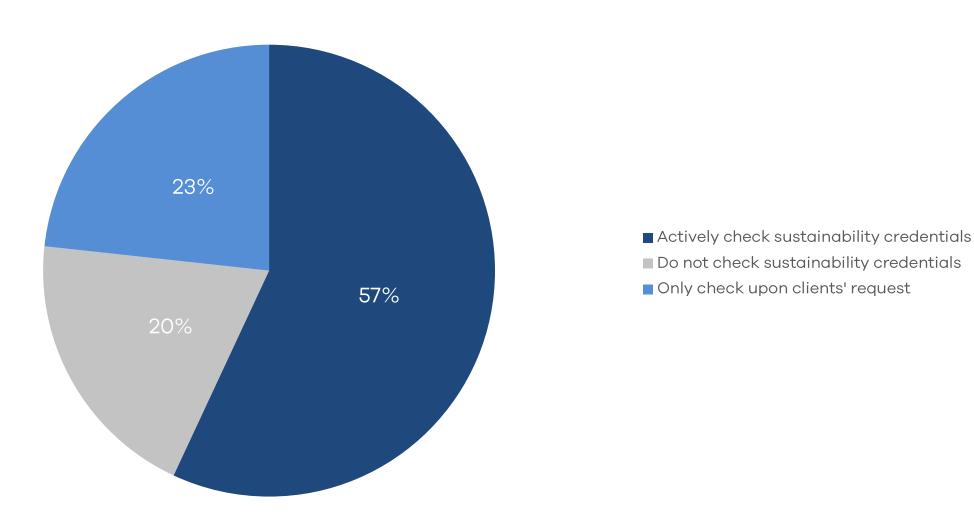


Meeting & Convention Travel "Wave IV" **Base:** Planning Professionals (n=86)

most frequently requested when booking a meeting and event? (Please select up to five)

Nearly 6 in 10 Are Already Actively Checking Sustainability Credentials

Another 23% check sustainability credentials upon clients' request.

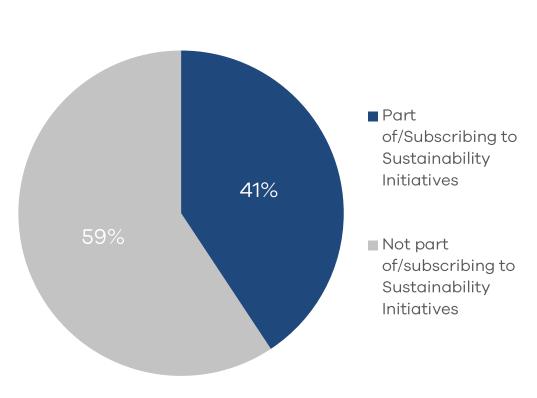


Source: MMGY Travel Intelligence Europe's December 2023 *Portrait of European Meeting & Convention Travel "Wave IV"*

Base: Planning Professionals (n=86)

Partaking in Sustainability Initiatives

Four in 10 of Planners participate or subscribe to sustainability initiatives.



Which Sustainability Initiatives do you take part in/subscribe to? (verbatim)

Spain informal CSR Group

ISLA

My own Br SF Association: now encouraging SF people to attend Convns by surface public transport (eg trains/metros etc) not (unless abs nec) by air...

ICE

Travel Life

Sustainable travel & tourism by the world tourism network

ISO20221

Green meetings initiative

Sustainable Travel Ireland

Dertouristik

MyClimate

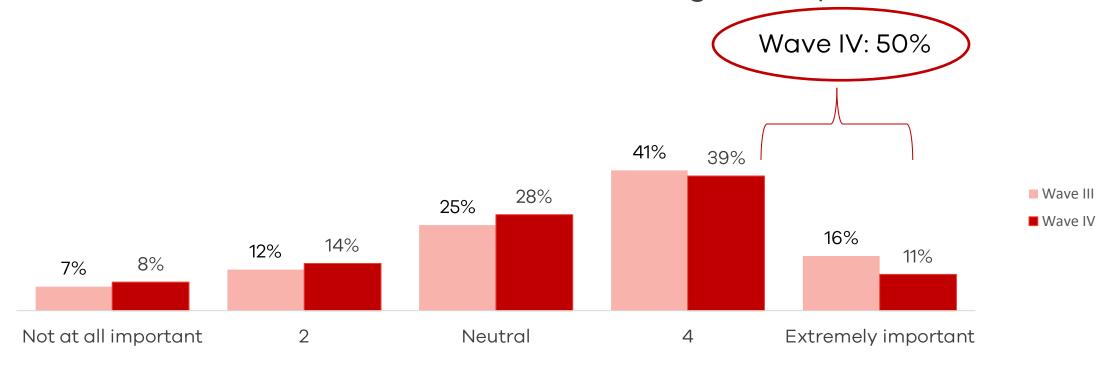
Circular Plastics & SDG

Sustainable events Club

AIM internal policy

Importance of Sustainable Meetings

Half of attendees see sustainable meetings as important.



Lower importance of sustainable meetings and events

Higher importance of sustainable meetings and events



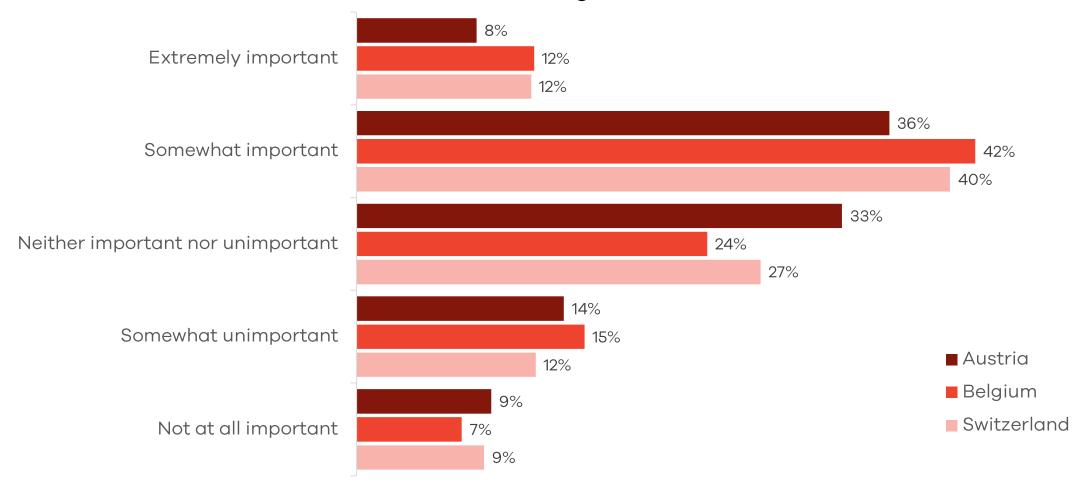
Base: Meeting Attendees (n=1,223)





Importance of Sustainability Meetings

Of the attendees surveyed, attendees from Austria are least concerned with traveling sustainably for meetings.



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

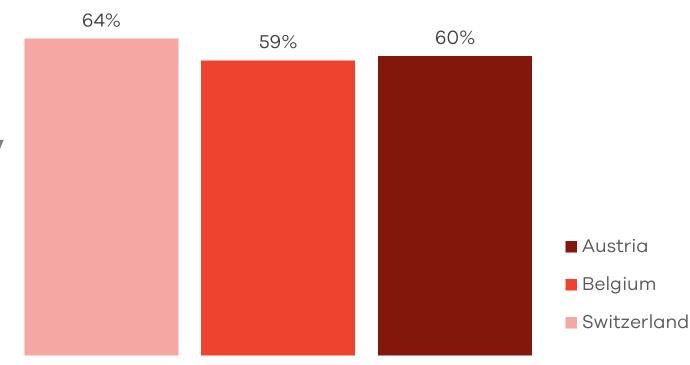
Question: On a scale from "Not at all" (1) to "A great deal" (5), please rate the extent to which each of the following factors will affect your decision to attend meetings and events in the next 24 months?

Willingness to Pay More for Sustainable Programs

Nearly two-thirds of attendees surveyed from Switzerland are willing to pay more to fund environmental and sustainable programs.

61%

of Attendees are willing to pay more to fund environmental and sustainable programs.



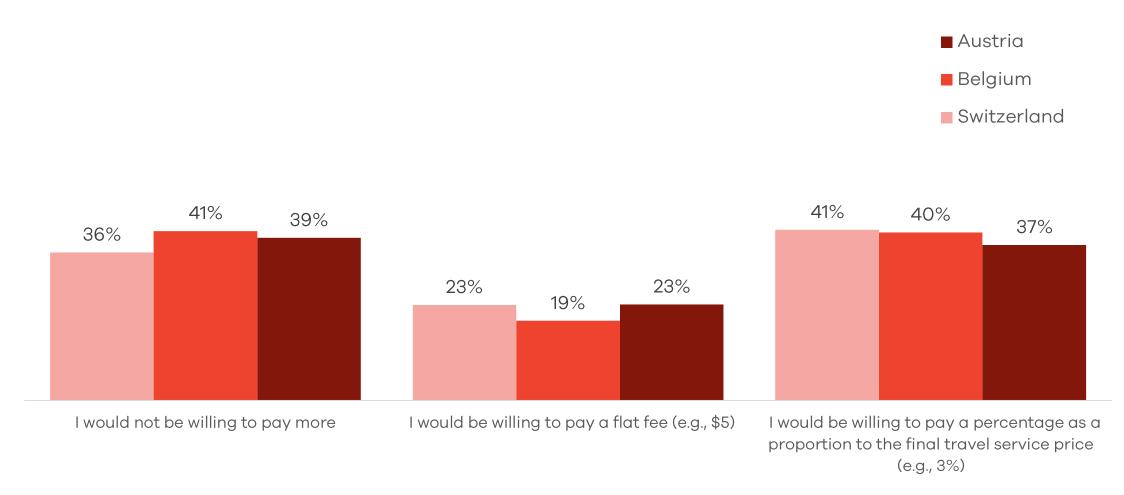
Willingness to Pay More





Willingness to Pay for Sustainable Programs

Four in 10 of attendees surveyed are willing to pay a percentage of the travel service price in order to fund environmental and sustainable programs.



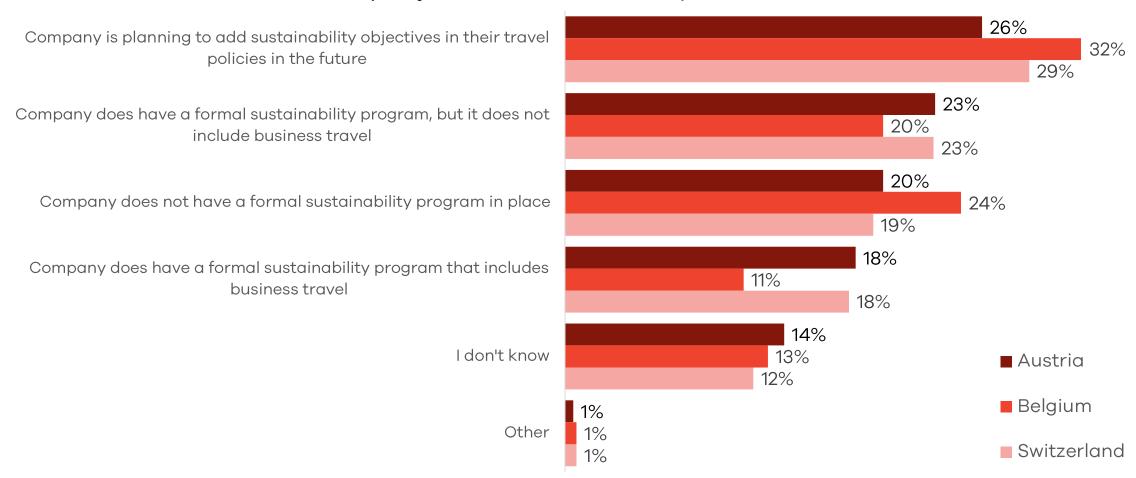
Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Which of the following options best reflects your willingness to pay a higher rate to patronize travel service providers to fund environmental and sustainability program?

Organization's Commitment to Sustainability Programs

While a quarter of respondents from Belgium state their company does not currently have a sustainability program in place, they are the most likely to be planning on adding sustainability objectives to their travel policies in the future.

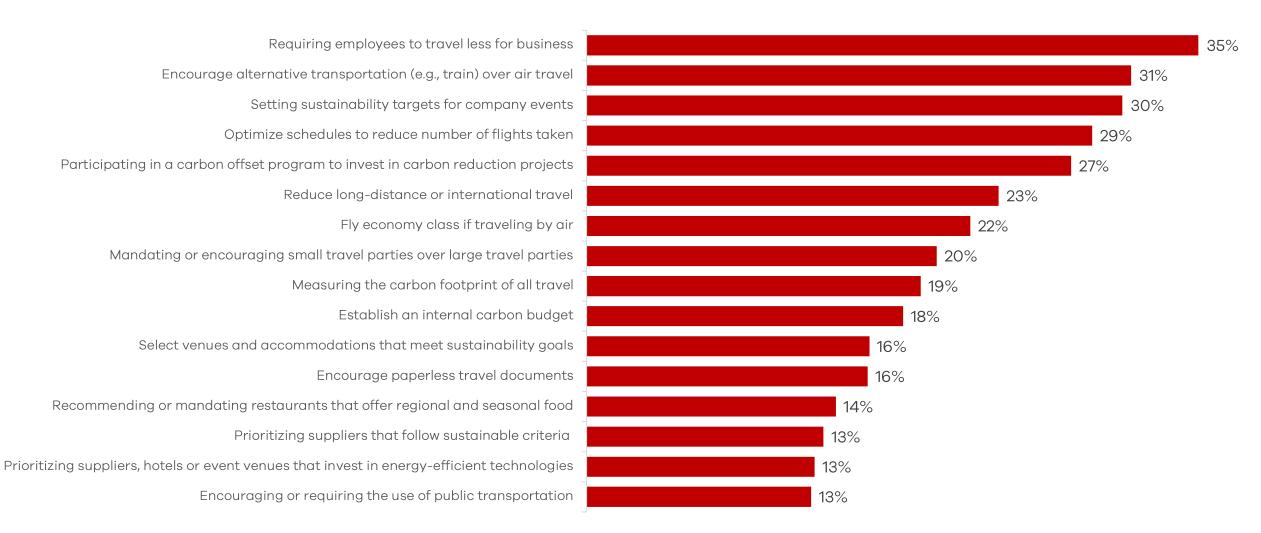


Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: What best describes your organization's (or the company you traveled for) commitment to implementing a business travel sustainability program?

Sustainability Efforts Attendees Would Like Their Organizations to Undertake in Order to Reduce Their Impact on the Environment



Source: MMGY Travel Intelligence Europe's December 2023 Portrait of European Meeting & Convention Travel "Wave IV"

Base: Meeting Attendees (n=1,223)

Question: Please select up to five (5) sustainability efforts you would like for your organization to undertake to reduce its impact on the environment.

