

Association meeting needs

ICCA 2022 Association Survey



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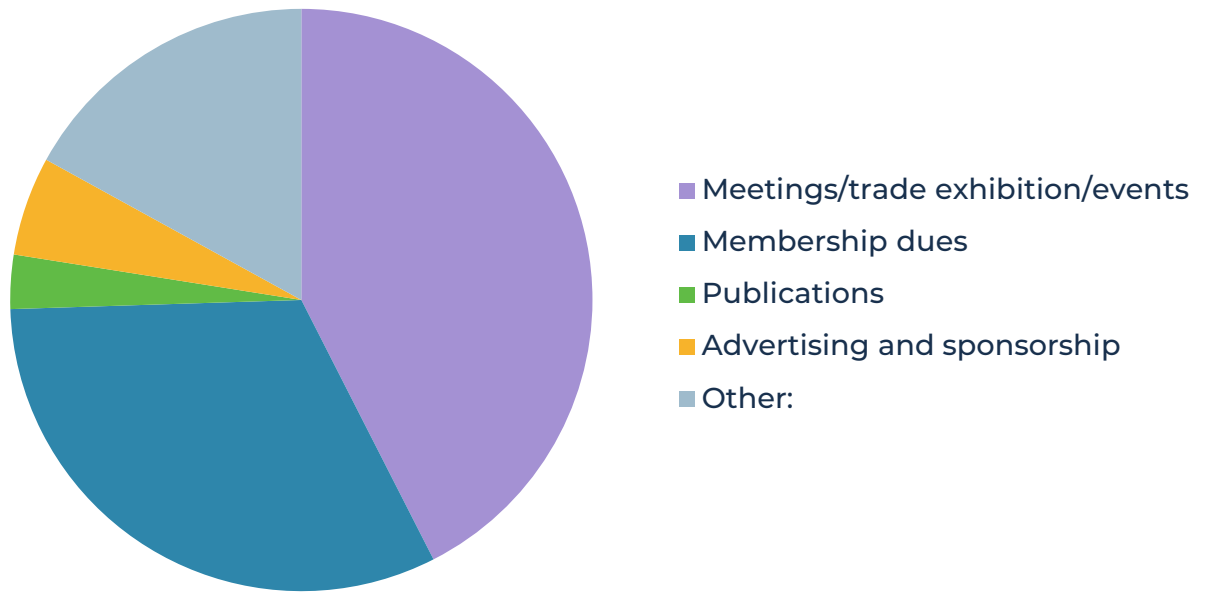
AFRICAN SOCIETY
OF ASSOCIATION
EXECUTIVES



1.2 Revenue streams

When it comes to revenue streams, many associations have realized the need for diversification. For the meetings industry it is however promising to see that associations are still relying on Meetings / Trade exhibition / Events as their main source of revenue, followed closely by Membership dues.

What is your association's main revenue stream?



Value	Percent
Meetings/trade exhibition/events	42.5%
Membership dues	32.0%
Publications	3.0%
Advertising and sponsorship	5.5%
Other:	17.0%

1.3 Top 3 challenges for associations

When it comes to the top three challenges associations are facing right now, it is clear that different parts of the world face very different challenges and abilities to cope throughout the pandemic. There are however some commonalities which many associations are struggling with, including:

Funding / financial challenges

- Raising sponsorship
- Diversification of revenue streams
- Declining membership dues

Resource and organisational issues

- Talent acquisition
- Organisational changes

Membership growth and retention

- Creating online engagement
- Staying relevant to members
- Volunteer interaction
- Young member engagement

Global issues

- Covid and restrictions to travel
- War in Ukraine

Events

- Switching to an online format
- Uncertainty on format, size etc. and need for contract flexibility
- Cost of hybrid events

Comments include:

“

Growing and retaining membership, fostering connections among members & achieving gender equity.

”

“

The uncertainty around our conference format and attendance (will hybrid meetings really be worth the financial investment they involve?), finding conference venues which are affordable, suitable and located in attractive European cities. Getting our members to join/renew other than to get a conference discounted rate.

”

“

Engendering and sustaining innovation, constant recruitment of new talent while retaining valuable and loyal leaders & financial resources.

”

“

Declining Membership. Increasing costs to host event - second largest revenue stream. Community desire to have instantaneous (often for free) access & personalized learning.

”

“

Be relevant and meet the different needs of a global membership base. Establishing new ways to actively engage with members and industry.

”

“

*Delivering value to the community Diversification of resources
Improving governance & management.*

”

“

Increase youth participation, making our congress more attractive to new delegates & Increase (online?) presence from low-income countries.

”

“

Regaining our attendance numbers for our in-person meetings. Dealing with the higher costs of hotels (rooms and F&B) when running in-person conferences. Hiring qualified employees.

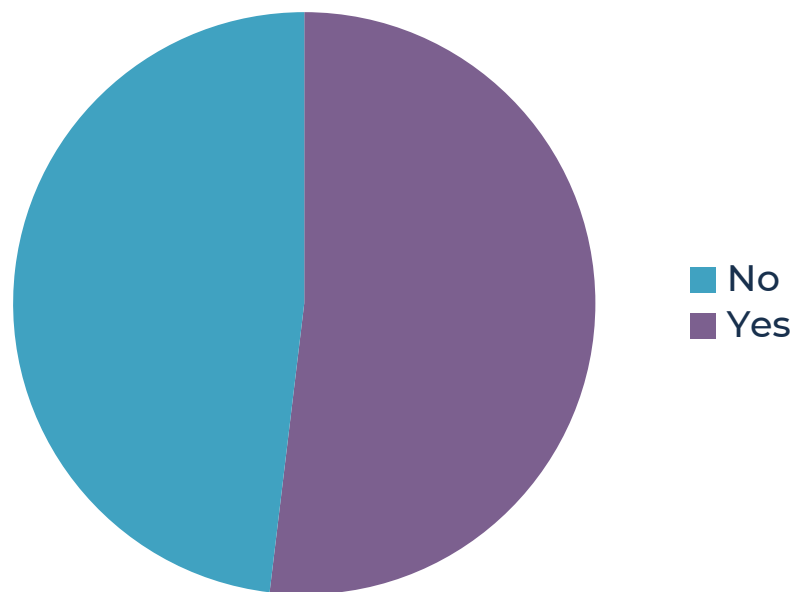
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2 How are association meetings changing?

2.1 Return to in-person meetings

Just over half (52%) of associations have been able to run an in-person meeting again since the start of the pandemic.

Since the start of the pandemic, has your association been able to run an in person meeting again?

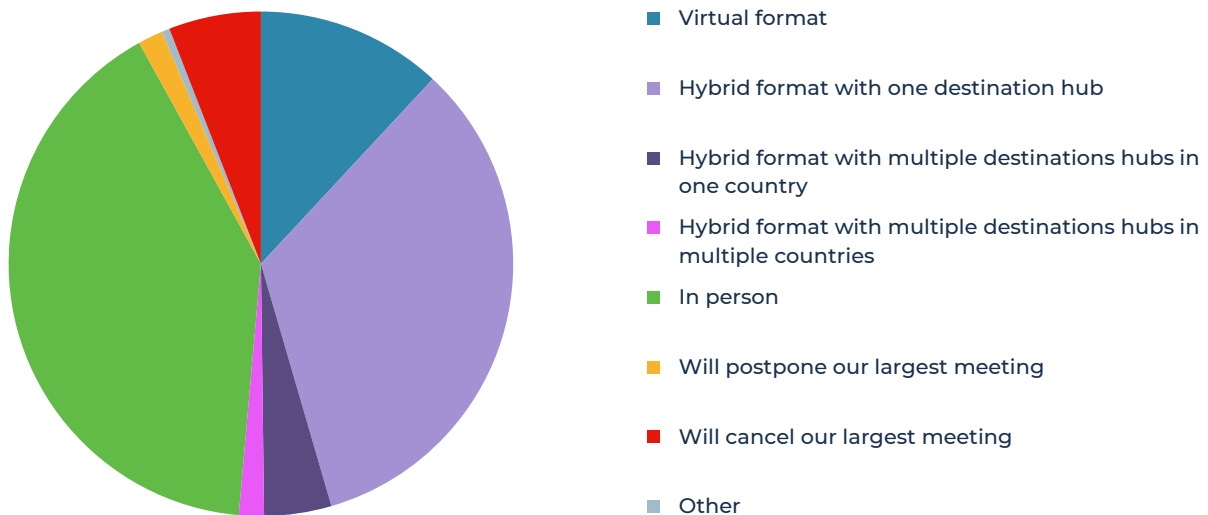


Value	Percent
Yes	51.9%
No	48.1%

When it comes to in person meetings, there is a clear trend towards running in person meetings again with 41% of associations planning their largest meeting in 2022 in in-person format. The same question was asked in 2021, when only 14% were planning their largest meeting in-person. Fully virtual events are declining, from 56% in 2021 to only 12% in 2022, indicating a clear appetite for the industry to come together again in a face-to-face format.

Format	2021	2022
Virtual format	56%	12%
Hybrid format with one destination hub	17%	33%
Hybrid format with multiple destination hubs in one country	2%	4%
Hybrid format with multiple destination hubs in multiple countries	2%	2%
In person	14%	41%
Will postpone our largest meeting to next year	6%	1%
Will cancel our largest meeting	1%	1%
Other	2%	6%

What format will you be adopting for your largest meeting planned in 2022?

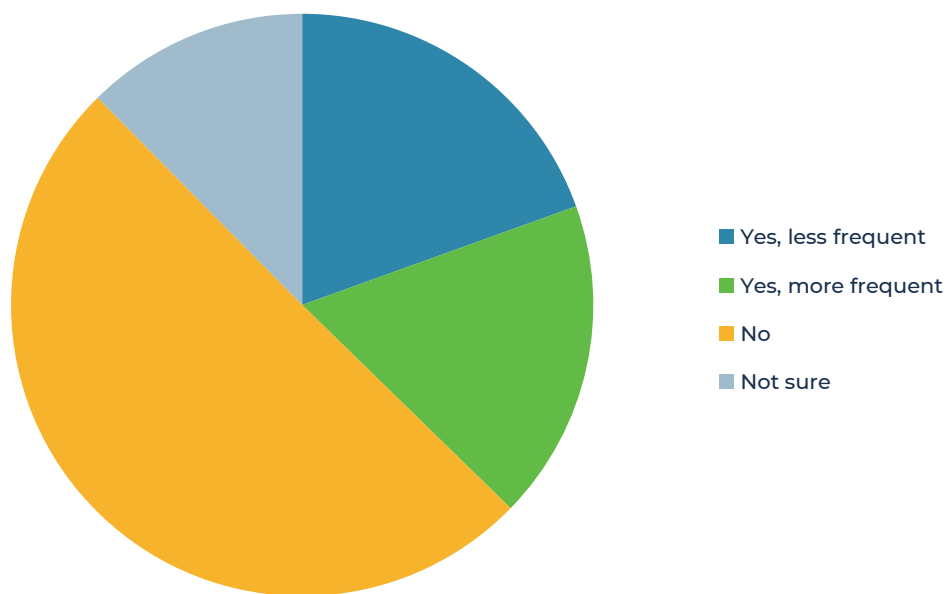


Value	Percent
Virtual format	11.9%
Hybrid format with one destination hub	33.5%
Hybrid format with multiple destinations hubs in one country	4.3%
Hybrid format with multiple destinations hubs in multiple countries	1.6%
In person	40.5%
Will postpone our largest meeting	1.6%
Will cancel our largest meeting	0.5%
Other, please explain:	5.9%

2.2 Frequency of in-person meetings

It is also good to see that for half of the associations the frequency of in-person meetings will remain the same as before the pandemic, and for a similar size group they would either become more or less frequent:

For 2022 and beyond, will you change the frequency of your in-person meetings?



Value	Percent
Yes, less frequent	19.5%
Yes, more frequent	17.8%
No	50.3%
Not sure	12.4%

2.3 Meeting rotation patterns

For around half of respondents the rotation pattern of their meetings has not changed due to the pandemic (48% in 2021 vs 50% in 2022).

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

	2021	2022
Yes	38%	43%
No	48%	50%
N/A	14%	7%

For those who have seen their rotation pattern affected, different reasons are mentioned including meetings being postponed and therefore rotation patterns lagging behind one or two years. Some associations have also adapted a more regional rotation patterns to ease travel capabilities for participants.

Most importantly, many associations have chosen to opt for destinations that work financially for them, are willing to collaborate and have more flexible Covid restrictions. This in turn has meant they had to (temporarily) ignore previously imposed rotation patterns.

Comments include:

“

Due to several postponements, the rotation is no longer guaranteed as we had to adapt to the different availabilities.

”

“

There is a backlog owing to countries that had won bids demanding for in-person meetings to be held in those countries.

”

“

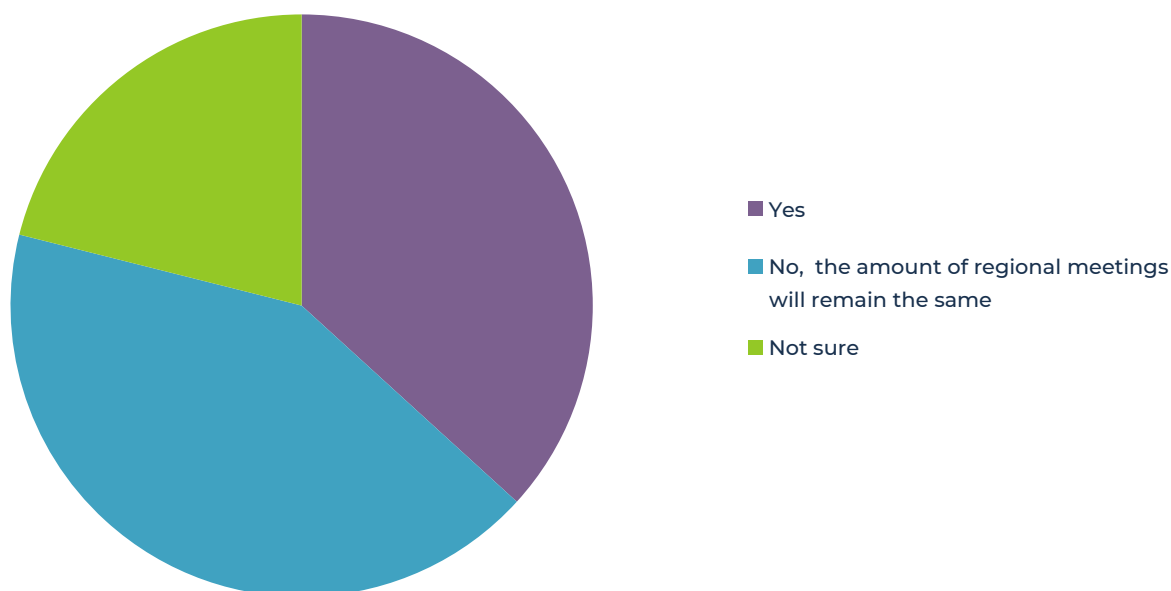
We have had to shuffle destinations around like shuffling a pack of cards. Very disconcerting, stressful for staff, full of risk whilst mitigating them at the same time

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2.4 Regional Meetings

When it comes to regional meetings, compared to last year there seems to be less uncertainty around this and less association planning regional meetings, indicating a shift back to international meetings.

Regional meetings	2021	2022
More regional meetings	51%	37%
Regional meetings will remain the same	12%	42%
Not sure	36%	21%



Value	Percent
Yes	36.8%
No, the amount of regional meetings will remain the same	42.2%
Not sure	21.1%

2.5 Sentiment towards face-to-face meetings

The general sentiment about the need for meeting face to face has remained, with many association executives truly appreciating the need to meet face to face, especially when it come to the networking aspects, which has been challenging to replicate in an online environment. Having spent almost two years in a mostly digital environment has brought event more certainty that face to face experienced cannot be fully replaced with digital alternatives.

Value of face to face	2021	2022
Virtual meetings have limitations to the networking discussions that face to face meetings offer	84%	78%
At face to face meetings you meet new people and make new contacts in the field	70%	78%
The ability to meet a wide range of people from across the globe in one place	44%	56%
Face to face offers a sense of community	66%	72%
Face to face offers the opportunity to immerse into the subject, away from daily tasks	53%	55%
To enjoy the personality of the host destination	41%	48%
To gain a better understanding of the subject matter and specialists from the host location	27%	31%
Other	6%	8%

3. What are the most important requirements from meeting suppliers?

3.1 Use of association services

When it comes to using Association Management Company (AMC) or Conference Management Company, the results from 2021 are quite similar to 2022, indicating that the pandemic has not increased the need for such services in the last year.

	2021	2022
Are you using services of an Association Management Company(AMC) or Conference Management Company?		
Yes	32%	34%
No	60%	57%
N/A	8%	9%

Amongst the 'traditional' services provided by PCOs and AMCs, there is a shift towards a greater need of support of the production of virtual events (up to 45% and highest scoring services in 2022) as well as experiential and meeting design. Overall, there is a greater need for services in general, with the majority of services (8 out of 12) scoring higher this year than they did last year.

What supplier services are of the greatest importance to you?	2021	2022	Increase decrease
Congress organization for-one off events	38%	37%	-1%
Core PCO services	33%	44%	11%
Association Management / Secretariat	22%	26%	4%
Sponsorship and fundraising	33%	39%	6%
DMC / Logistics services	42%	34%	-8%
Exhibition Management	35%	44%	9%
Communication for events	35%	39%	4%
Production of (virtual) Events	40%	45%	5%
Experiential and Meeting Design	13%	23%	10%
Integrated digital meeting platforms	40%	40%	0%
Abstract Management	24%	32%	8%
Other	9%	3%	-6%

Flexible contract conditions is still the highest scoring requirement from meeting suppliers, ranking number 1 in 2021 and also in 2022. Assistance with content creation and recruitment of local subject matter experts were considered of least importance, for both 2021 and 2022. The need for COVID-19 related safety protocols/certification has decreased when comparing 2022 with 2021.

The opportunity for strategic alliances and effective partnerships with meeting suppliers and the ability of meeting suppliers to support associations' sustainability strategies are also considered of high importance, with 54% and 63% of responses respectively scoring these items at either 4 or 5.



2021 highest ranking

1. Flexible contract conditions
2. COVID-19 related safety protocols/certification

2022 highest ranking

1. Flexible contract conditions
2. Flexible space accommodation



2021 lowest ranking

1. Assistance with content creation
2. Assistance with recruiting local subject matter experts

2022 lowest ranking

1. Assistance with content creation
2. Assistance with recruiting local subject matter experts

Year	Percentage of total responses					
	1	2	3	4	5	
Ability to support your association's legacy programmes	2022	15%	12%	28%	19%	26%
Ability to support your association's sustainability strategy	2022	10%	11%	25%	20%	34%
COVID-19 related safety protocols/certification	2022	7%	7%	25%	26%	35%
	2021	8%	3%	10%	21%	58%
Integration of technology to support hybrid and online events	2022	11%	11%	18%	22%	39%
	2021	7%	5%	18%	24%	46%
Having a diversity, inclusion and equity policy in place	2022	13%	12%	26%	26%	24%
Flexible contract conditions	2022	7%	5%	15%	21%	52%
	2021	3%	4%	15%	18%	60%
Flexible space accommodation	2022	5%	3%	13%	31%	49%
	2021	5%	8%	21%	22%	46%
Assistance with promotion and communications surrounding the meeting	2022	10%	13%	25%	23%	29%
	2021	13%	17%	32%	17%	21%
Assistance with content creation	2022	26%	17%	26%	19%	13%
	2021	33%	21%	22%	7%	16%
Support with travel arrangements associated with local COVID-19 regulations	2022	26%	16%	19%	18%	21%
	2021	32%	19%	28%	11%	11%
Assistance with recruiting local subject matter experts	2022	12%	13%	25%	27%	23%
	2021	16%	9%	22%	30%	23%
Opportunity for strategic alliances and effective partnerships	2022	11%	8%	19%	25%	38%

3.2 Requests for Proposals

When it comes to RFPs, 40% of respondents (in both 2021 and 2022) are indicating they have not changed them, slightly more are saying they have amended their RFPs (30% in 2022 compared to 26% in 2021). This is quite surprising considering the changes in associations' meeting requirements over the last two years and could therefore indicate an important area where both meeting suppliers and ICCA can further support associations with.

Have you amended your RFP?

	2021	2022
Yes	26%	30%
No	40%	40%
N/A	34%	30%

The most commonly mentioned changes to RFPs include

- More flexible terms
- Insurance and force majeure clauses
- Requirements for hybrid elements
- Introduction of legacy requirements
- Sustainability requirements
- Covid mitigation policies
- Adaptation to timelines and selection criteria

“ We will be amending our upcoming RFP. Specially towards sustainability approach ”

“ We are in the process of developing a flexible RFP that can be tailored to a number of event formats and sizes. ”

“ RFP includes our legacy mission, sustainability requirements, COVID disclosures, quotes for internet access. ”

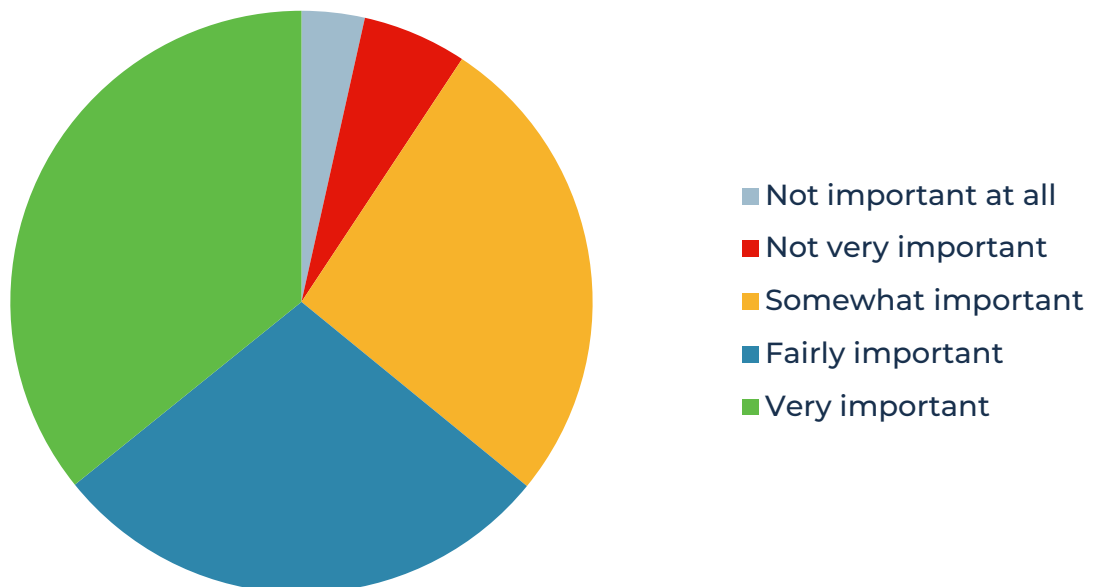
“ Integration of legacy in our association objective / higher involvement of the destination & local political / higher value for involvement of a broad and full ecosystem / recurring editions possibilities / digitalization and hybridization / more format and logistical flexibility. ”

4. How can meeting suppliers support associations to make meetings more sustainable?

4.1 Reducing environmental impact

64% of respondents state it is very important or fairly important for their organization to reduce the environment impact of their events. With the number of organizations signing up for the **Net Zero Carbon Events** initiative, it is crucial for both association and meeting suppliers to understand how they can work together to make events more sustainable, and to reach carbon zero by 2050.

How important (if at all) is it to your organisation to reduce the environmental impact of your events?



Value	Percent
Not important at all	3.5%
Not very important	5.8%
Somewhat important	26.6%
Fairly important	28.3%
Very important	35.8%

4.2 Making events more sustainable

When it comes to the top three challenges associations are facing right now, it is clear that different parts of the world face very different challenges and abilities to cope throughout the pandemic. There are however some commonalities which many associations are struggling with, including:

- Collaboration and partnership amongst all those involved in events
- Standardized accreditation among venues/destinations creating
- Common carbon measurement tools to set an industry standard
- Working with sustainable suppliers
- Having financial support or incentives available for sustainable choices
- Training, capacity building, sharing of best practices, guidelines and practical tips for event organizers
- Involving local communities as beneficiaries
- Creating events that leave a legacy behind
- Sustainable catering (vegetarian/vegan/locally sourced), recycling policies, proactive waste reduction, green energy supply
- Incorporation of digital component to reduce travel requirement, public transport options and alternatives to air travel



Comments include:

“ Partnering with destinations on how to reduce carbon footprints through recycling, cut out plastic usage, minimize food waste, saving on water use, use of eco-friendly products, and reduction of electricity usage. Apply for carbon credits from local authorities. Ask participants to contribute equally towards the event but prevail upon those who wish not to travel to participate virtually. ”

“ Connect with genuine sustainable initiatives in their destination. ”

“ Have a set industry standard or provide measurement tools to help organisation measure the value of their sustainability measures implemented. ”

“ Look at more ways to recycle materials used and access to recycled options. Provide organizers with access to local contacts for repurposing, recycling, carbon offset programmes, community programmes to make the process easier. ”

“ Not sure it is the duty of the industry, rather educate the delegates to abstain from their flashy expectations and wasteful behaviour. Balance 'wow factor' of exhibitions, shows, menus, decorations, 'gifts' etc. with sensible sustainable approach without making it a 'cheap' experience. ”

“ Offer guidelines on how to organise events that are more sustainable, share best practices, connect to providers, etc. ”

5. How can suppliers help associations achieve their goals?

5.1 Helping associations with their recovery

Although more than half of associations responding to the survey have been able to get back to in-person meetings, the road to recovery is still ongoing. In terms of support associations need at this current time in their recovery efforts, are mostly centered around the need for flexibility in the contracts and effective communication and collaboration with meeting suppliers.

Other aspects that were mentioned include the need for sharing best practices, advice on securing event sponsorship and assistance with event promotion.

“

Be true partners and work with associations to ensure success of the events. Associations do not have corporate budgets and have been hit especially hard and being flexible regarding F&B specifically would be helpful.

”

“

Flexibility - we need suppliers to offer flexible solutions, and venues to understand we cannot sign a contract 6 years in advance.

”

“

More collaboration is needed among associations from the same industry to create diversified content, knowledge sharing would surely support associations, specifically the smaller ones.

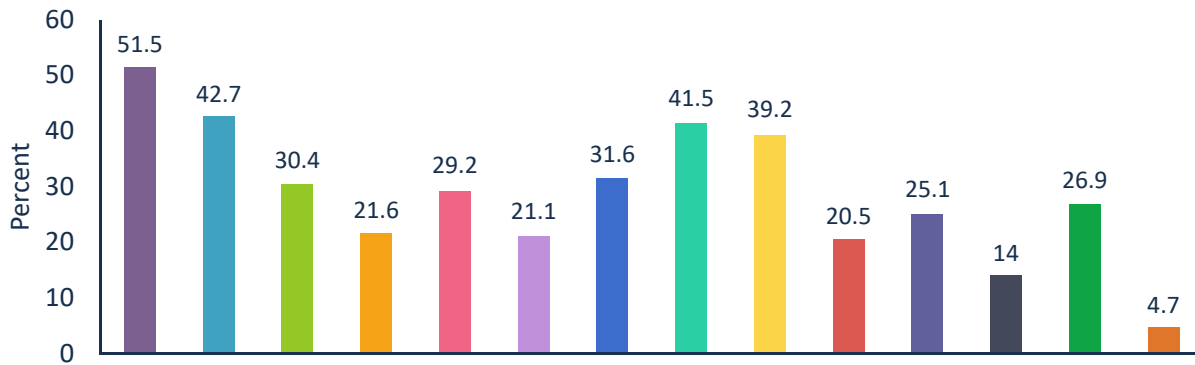
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5.2 Educational support for associations

In terms of educational content and supporting association executives, there is still a high need to learn about the practicalities of organising hybrid events. A new topic on how to organise sustainable events was added to the 2022 survey, and this came out as second highest ranking topic.

Compared to last year, there is a considerable lower need for associations to learn about and be supported in the areas of COVID-19 safe event planning and events technology, most likely due to the level of practical experience associations gained in these areas over the last year. On the other hand, the need to learn about and be supported in marketing and communication for events has seen an increase of 11%.

What areas do you need support with or want to learn more about? (select your top 3)



- Hybrid events
- Sustainable events
- Events technology
- COVID-19 safe event planning
- Digital content strategy
- Virtual event ROI
- Crisis management for events
- Member engagement
- Marketing and communication for events
- Destination selection: bidding and decision making
- Legacy programmes for events
- Working with meetings management companies
- Advocacy / public engagement
- Other

Topic	2021	2022	Difference
How to organize hybrid events	65%	52%	-14%
Sustainable events	-	43%	-
Events technology	57%	30%	-27%
COVID-19 safe event planning	49%	22%	-27%
Digital content strategy	46%	29%	-17%
Virtual event ROI	43%	21%	-22%
Crisis management for events	38%	32%	-6%
Member engagement	36%	42%	6%
Marketing and communication for events	28%	39%	11%
Destination selection: bidding and decision making	27%	21%	-7%
Legacy programmes for events	18%	25%	7%
Working with meetings management companies	15%	14%	-1%
Advocacy / public engagement	-	27%	-
Negotiating with hotels	26%	-	-

5.3 Lessons learnt

Many lessons have been learnt and are continuing to be learnt as a result of the pandemic. It is not surprising to see that for many associations those lessons revolve around the aspects of hybrid and virtual event delivery. Apart from the practicalities of switching from onsite to online, both for events as well as the entire workforce, there are many even greater lessons to be taken from it all. Associations have been forced to go back to their core and assess the values that truly matter to their organization. With this has come the realization that the pandemic has not affected every organization in the same way, and that they are all in different stages of the journey to recovery.

Agility and innovation have been more important than ever during these times, whilst at the same time ensuring financial stability and safety for our members. Virtual events has enabled associations to continue to engage with their members whilst the world came at a standstill. There is however a clear realization that to get those real human connections, nothing beats a real in-person interaction. And most importantly, making sure to always have a plan B, and a plan C for that matter.

Comments include:

Better equity across our membership with a two pronged legacy, both directly related to our mission statement and toward sustainability and philanthropy.

Health of our participants is vital to a successful meeting. Vaccines are a very powerful tool. Strong communities bring about changes in an organization. Harnessing technology to continue providing services. Power of innovation. Everyone is not treated equally during in a pandemic.

Flexibility is key; virtual requires more resources than in-person, and hybrid requires more resources than either; sometimes you have to make decisions without all the data you'd like to have.

Having good contact with suppliers and venues are of utmost importance. Fair contract negotiations and clear communication is important.

The hybrid model is the way forward for our industry as it help inclusion and diversity to be effective.”

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