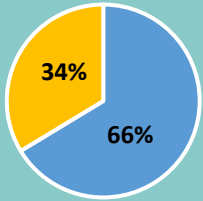




Understanding the sentiment of international associations is key to inform the business tourism industry's recovery post pandemic.

202 Associations (with Irish members) were interviewed by telephone (Aug - Oct 2021) to:

- 1. Understand where associations are at in terms of future conference planning and the legacy of hybrid events.
- 2. Identify impact and challenges of Covid on short- and medium-term destination decision-making.
- 3. Measure awareness of Ireland, consideration for future events and where the opportunity lies for Ireland.



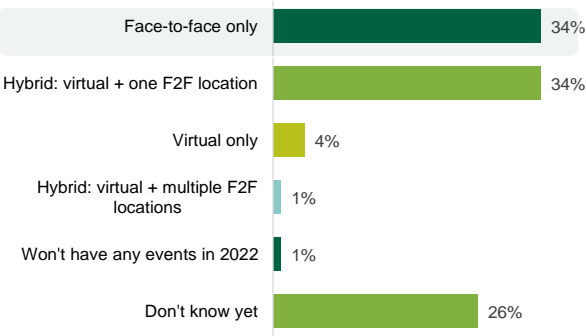
European Assocs. (134)

International Assocs. (68)

Conference Formats in 2022

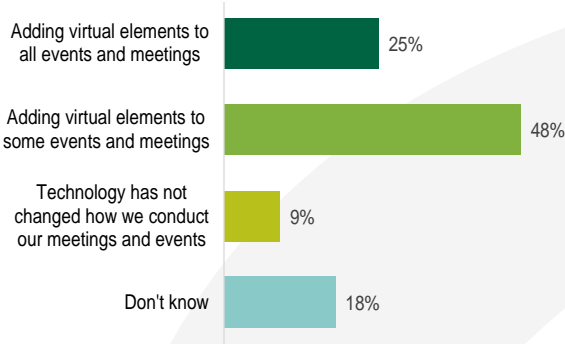
- Associations are all planning conferences in 2022, albeit in different formats.
- In 2020's wave, associations expected that hybrid events were here to stay; however, that outlook has changed for 2022 for associations' largest event.
- **Associations are eager to resume face-to-face (F2F) conferences whenever they can.**
- **While the additional reach of hybrid is recognised, hybrid events are seen as more expensive and complex to organise than F2F conferences.**

Q: What format will your largest event in 2022 take:



Impact of Technology

Q: What is the impact of Technology on your overall events and meeting programme next year

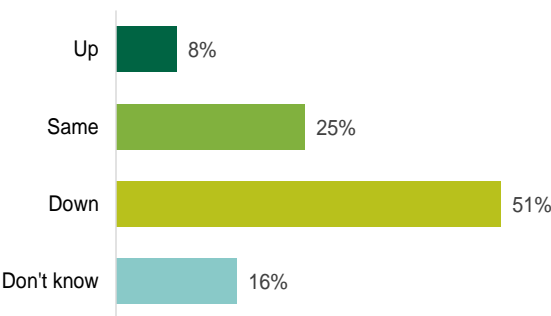


- A virtual offering provides greater reach – it was used (videoing or streaming sessions) by about a third (35%) pre-Covid and will therefore remain for many associations.
- But this does not mean that all events will be hybrid.
- Running a hybrid event well adds to the complexity and cost of a conference programme – the technological capability of suppliers has become more important.
- Some organisers will offer a 'hybrid programme' – some events F2F only and some virtual only.

How Conference Planning will Change (post-Covid)

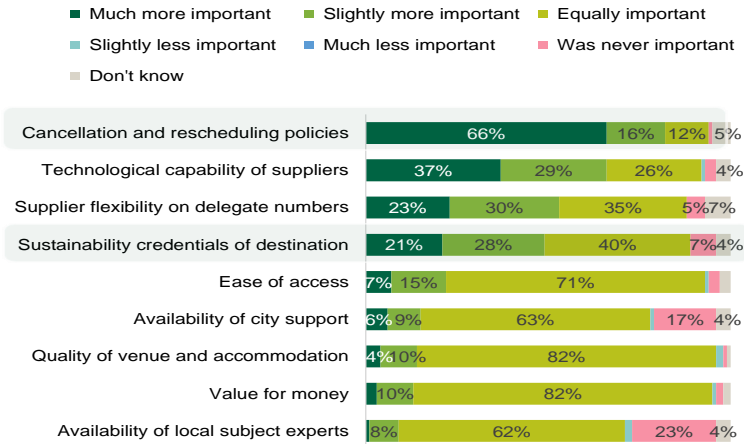
- **Lead times** stay roughly the same and where there is change, they will become longer, not shorter.
- **Ease of access** (direct and easy access) is as it always was, with minimal impact expected post-Covid.
- Half (51%) of Associations expect **delegate numbers** to be reduced when face to face conferences resume.
 - About a third (32%) are more optimistic and expect numbers to either remain the same (25%) or increase (8%).
- Uncertainty in delegate numbers will undoubtedly **increase the demands for flexibility from suppliers.**

Q: Compared to pre-pandemic times, would you expect the number of delegates [...] to be?



Change in Importance of Decision-Making Factors

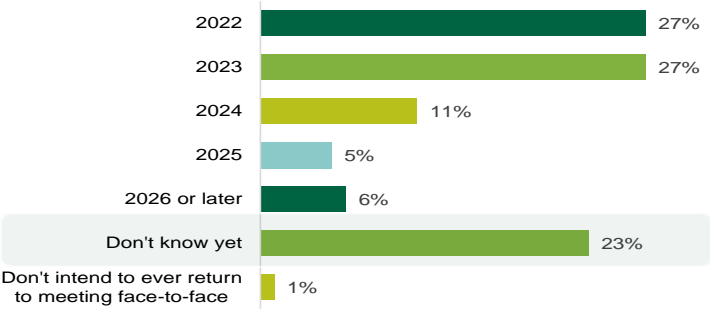
Q: In post-pandemic destination planning, have each of the following decision making factors become more or less important?



- **Cancellation and rescheduling policies** have become far more important (for two thirds of associations).
- While not directly related to the pandemic, **sustainability** has become noticeably more important to Associations than it was (pre-pandemic).
- **Covid protocols are causing Associations stress** in how to manage the logistics and the practicalities of it all.

Next Open Year

Q: When is the earliest possible year (after 2021) for a F2F event, where the destination has not already been decided:

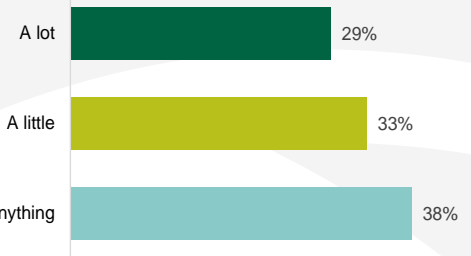


- **Over half (54%)** of associations say they might have a face-to-face event (*not necessarily their main conference*) in the next two years (2022 & 2023) where the **destination has not already been decided**.
- **European associations seem to offer more immediate opportunity** – 31% have ‘2022’ as their next open year.

Sales & Marketing Insights

- **62% of Associations have a lot (29%) or a little (33%) awareness of Ireland** as a business event destination.
- Awareness of Ireland is driven by two key sources:
 1. **Experience from holding previous events in Ireland, and**
 2. **Ireland-based members or colleagues**

Q: How Much do you know about Ireland as a business events destination?



Key Takeaways

- On the whole, Associations **think positively of Ireland** as a friendly, hospitable place that could be suitable for a conference. Choosing Ireland however **depends largely on having proactive members** willing to host.
- Associations where they can would like to return to F2F events, however there are still concerns over delegate numbers which requires continued flexibility from suppliers.
- Concern over delegate numbers could offer opportunities for Ireland. Ireland could widen the net to target conferences that previously weren't within Ireland's capacity range.
- The pandemic has given time to pause and think about the prioritization of conference requirements - **Ireland needs to promote all and any sustainability credentials**
- Previous research has repeatedly shown high importance of ease of access. Some European associations **perceive Ireland as 'out on a limb'**. Being an island cuts down travel options and creates psychological distance.