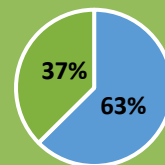


Understanding the sentiment of international Corporate Meeting Planners and Agencies is key to inform the business tourism industry's recovery post pandemic.

147 interviews¹ were conducted by telephone (Oct - Nov 2021) with GB & German Agencies & Planners and a small sample of US Agencies to:

1. Understand where corporate planners and agencies are at in terms of future planning.
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.



■ In-House Corporate Planners (92)

□ Agents (55)

Meeting/Event Format 2022 [In-House Planners]

- There is still **so much uncertainty over planning and attending face-to face (F2F) events in 2022** (little has changed since the 2020 wave).
- **Only a quarter (25%) of corporate in-house organisers expect their largest event in 2022 to be F2F or hybrid.**
- About three-in-ten (28%) say largest event will be virtual only; a further three-in-ten (32%) have no firm plans for their largest event yet.

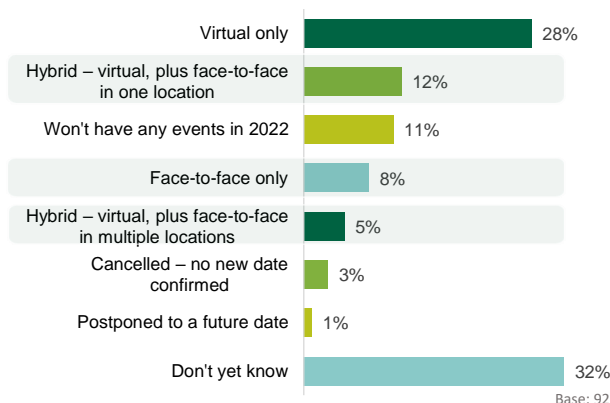


16% GB in-house planners plan their largest event to be F2F only



However, none in Germany have said their largest event will be F2F only

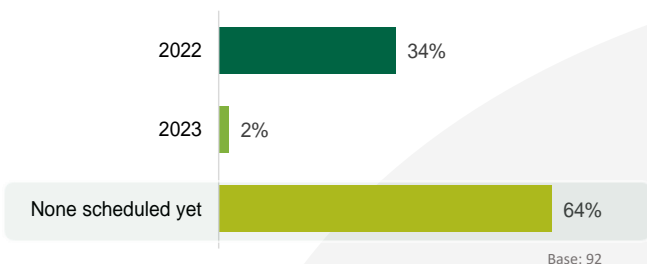
Q: In-House Planners: What format will your largest event in 2022 take:



Next Face-to-Face Event? In-House Planners vs. Agencies

In-House Planners:

Q: When is your next meeting or event involving people meeting face-to-face scheduled for ?



- Around two thirds (64%) of corporate in-house planners currently have no scheduled events which involve people meeting face-to-face.
- More certainty in GB than Germany:



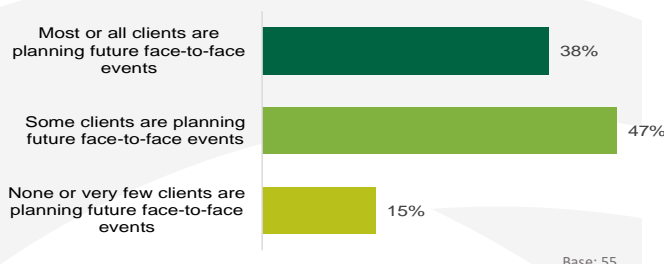
45% of GB in-house organisers have a face-to-face event scheduled in 2022 and **52% have nothing scheduled.**



23% of German in-house organisers have a face-to-face event scheduled in 2022 but **75% have nothing scheduled.**

Agencies:

Q: What is the position of your clients on resuming international corporate events face-to-face?



- Feedback from agencies is also mixed, although **most (85%) have at least one client currently planning international face-to-face events.**
- Among clients planning face-to-face events, 26% are/were planning for 2021, and 70% are planning for 2022.

Market Nuance on Returning to Face-to-Face (F2F) Events



Most uncertain market to return to F2F events due to soaring Covid cases.

Those that have F2F events planned, worry if it will go ahead & who will turn up.



In between Germany & US for confidence in returning to F2F.

Many complications are being experienced for those that are hosting F2F events– loss of suppliers, staff shortage for events alongside Covid protocols.



Much more confident about meeting F2F than European organisers

Some barely stopped F2F events, however navigating (perceived changing) rules in European destinations is a deterrent.

¹ 147 Interviews: 78 GB / 55 Germany / 14 US

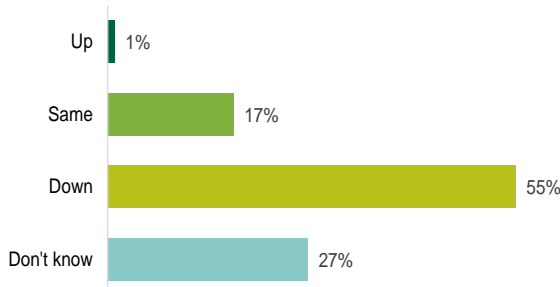
How Corporate Event Planning will Change (post-Covid)

- **Lead times** stay roughly the same and where there is change, they will become longer, not shorter.
- **Impact of technology***: corporates who add virtual elements to their events seem to have budget for higher-end online platforms.
- Over half (55%) of organisers expect **delegate numbers to be reduced** when F2F events resume. Over a quarter (27%) still don't know what the impact will be on delegate numbers.
- Uncertainty in delegate numbers will undoubtedly make planning more difficult and **increase the demands for flexibility from suppliers**.
- **Frequency**: Over half (55%) of organisers expect reduced frequency of F2F events compared to pre-pandemic.



63% of GB organisers expect reduced frequency compared to 47% of German organisers

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



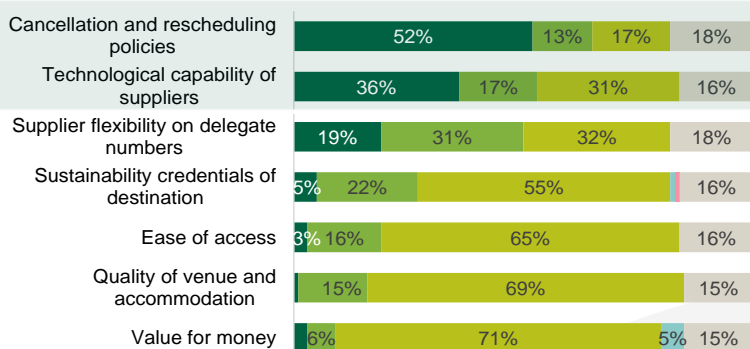
*Virtual Elements are Here to Stay

While opinions vary on the extent to which virtual elements feature as part of programmes in the longer term, the current consensus is that for the moment they are here to stay.

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?

- Much more important
- Slightly more important
- Equally important
- Slightly less important
- Much less important
- Was never important
- Don't know



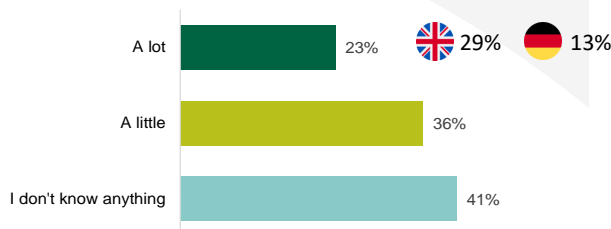
- **Cancellation and rescheduling policies** have become far more important than pre-pandemic.
- Many look to suppliers for help with technology.
- Not knowing how many delegates can or will turn up **demands flexibility from suppliers on numbers**.
- While not directly related to the pandemic, **sustainability** has become more important for some.

Sales & Marketing Insights

Previous event experience (37%) is mentioned as a primary source of information about Ireland, especially by GB organisers (43%) & all agencies regardless of market (61%).

Online searches (35%), previous Fam to Ireland (26%), Emails & e-Newletters (23%), previous visit to Ireland (22%) & Trade shows (14%) are also important.

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



Key Takeaways

- On the whole, in-house planners and agencies **talk favourably about Ireland**; seen as attractive destination – beautiful, friendly
- Awareness of Ireland comes from a wide range of channels and sources, however consideration of Ireland for an event depends largely on having offices or industry connections in Ireland
- **There is still so much** uncertainty over planning and attending F2F events in 2022.
- **Corporate policies re F2F events**: Two in five (39%) cite corporate policies which prevent in-person event attendance without vaccination (or exemption), but enforcing compliance is a challenge. Of the remaining corporates 15% say policies are constantly changing and 27% don't know what the policies are (due to being undecided).