



ICCA Annual Statistics Study 2020

Analyzing an exceptional and transformational year



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ICCA Statistics ‘Reinvented’. This 2020 Report is not a Ranking.

The past year has transformed the way the international association meetings industry does business. As a result, ICCA has also reinvented the 2020 ICCA Statistics Report on the association meetings market. We are excited to bring you this latest iteration of the report with a more holistic and accurate representation of the COVID-19 pandemic’s impact on association meetings globally.

In the 2020 report, you’ll find details on international meetings that were supposed to take place with insights into what became of COVID-19 affected meetings. We’ve added new categories to represent the full spectrum of solutions that event planners implemented in 2020; including virtual and hybrid meetings, postponement, cancellation, and relocation.

The report delivers analysis on economic impact, revenue loss and other key parameters. An examination of the total expenditure in 2019 vs 2020 reveals the industry’s strong desire to return to face-to-face meetings. However, in the future, meetings are likely to include elements and best practices from virtual and hybrid events.

You can further see that postponed meetings remain overall loyal to their original destination. In short, they’ll be back. And when they return, they are likely to entice larger audiences of delegates eager to meet face-to-face within the necessary safety protocols. Meanwhile, virtual and hybrid events have helped associations expand their audience and keep members engaged with their activities. These are all positive developments that can guide top-level decision makers within associations, sectors, and local governments.

The 2020 ICCA Statistics Report not only provides a closer look at what was, it gives a clearer view of what is ahead. We at ICCA World steadfastly believe that the global association meetings industry is entering a brighter, stronger future.

Warm regards,

Senthil Gopinath

ICCA CEO

Introduction

As ICCA’s annual data gathering and statistical cycle has come to an end, it is time to reflect on the exceptional and perhaps transformational year that was 2020. For this year, it was decided to add an additional analytical layer to the statistical data in the [Destination Comparison Tool \(DCT\)](#), in the form of this report.

The content of this report complements this year’s DCT and will dive deeper into the data in order to provide you with further insights in what the year 2020 has brought the associations meetings industry.

This year’s DCT will be slightly different compared to previous years, as it will only consist of meetings that were either held or planned in 2020. The previous DCT, containing data on the years 1963-2019 will still be accessible in the new DCT for your convenience and reference.

The DCT remains a dynamic tool which allows you to make your own selections (filter on: pax, subject and the possibility to compare 5 destinations, etc.)

As an addition, the Association Database in the majority of cases, displays the motivation of the organizers of planned 2020 meetings with regards to their affected status.

To view the database and the DCT, we invite you to log-in to the MyICCA section of the website to access these valuable tools.

As the COVID-19 pandemic has impacted nearly every association meeting from its onset early last year, it was decided to exclude the previous years for comparison as this would lead to skewed comparisons.

By leaving out the previous years there was room to add information with regards to how meetings were impacted by the pandemic. Meetings have been affected in multiple ways and ICCA has applied the following classification for all meetings:

Classification for all meetings:

- **Postponed**
- **Hybrid**
- **Cancelled**
- **Relocated**
- **Virtual**
- **Unaffected**

In total, 8.409 unique meetings were identified which were either held or planned in 2020. In last year’s report the number of unique events was 13.252. This significant drop-off can partially be explained by the fact that numerous event websites were taken offline prematurely or were never established in the first place as a consequence of the pandemic, making it difficult to identify these meetings for 2020.

Most conference organisers have updated the webpage for the postponed or cancelled 2020 conference with new dates or location for future years which made researching conferences and even finding the original dates for the 2020 event, more difficult.

Collecting the data has been particularly challenging for our members in 2020 as, due to the lockdowns, the vast majority of venues and hotels were closed and most of the staff on furlough, working at very reduced hours, or sadly been made redundant. This unfortunately meant that the response rate from the venues overall was extremely low compared to previous years.

Total number of events by status and month (2020)

As can be seen in fig.1, by far, the majority of meetings in 2020 were Postponed (44%), a trend which increased throughout the middle of the year and gradually decreased in the second half of 2020 (see fig.2)

The second largest segment was Virtual meetings (30%), which started off as the smallest segment and grew to become the largest segment, overtaking the Postponed meetings in the last two months of 2020, signaling a growing adaptation of the association meetings industry to the ongoing pandemic.

The 3rd largest segment was Cancelled meetings (14%), which was the largest segment at the beginning of the year and became the second smallest segment at year's end, a further sign of adaptation.

Relocated and Hybrid meetings make up the smallest segments, with relocation being the least favored option for meeting continuation (1%), as one would expect due to additional logistics and costs, and Hybrid meetings (2%) gaining a bit more traction from August onwards.

Total number of events by status

● Postponed	3.714 (44%)
● Hybrid	143 (2%)
● Cancelled	1.211 (14%)
● Relocated	73 (1%)
● Virtual	2.505 (30%)
● Unaffected	763 (9%)

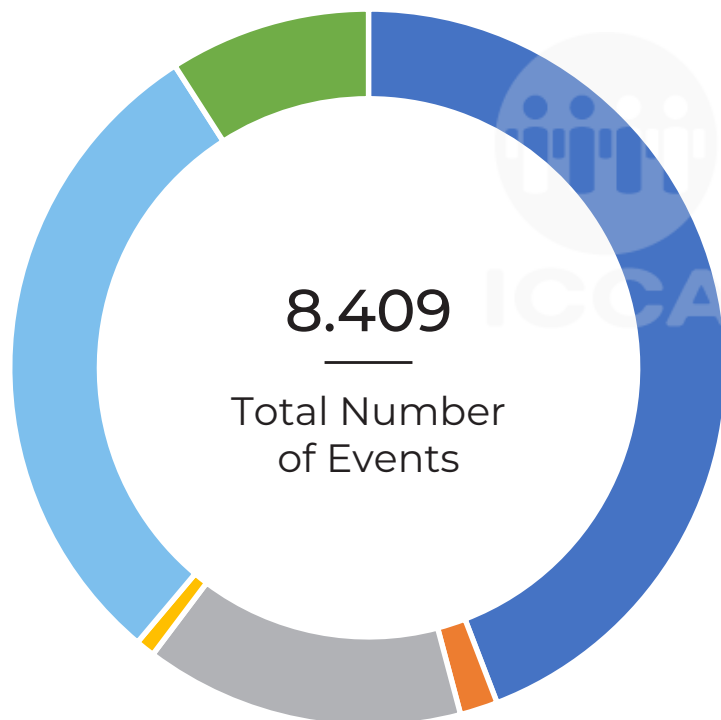


Fig. 1: Total number of events by status

Affected % of meetings by month (2020)

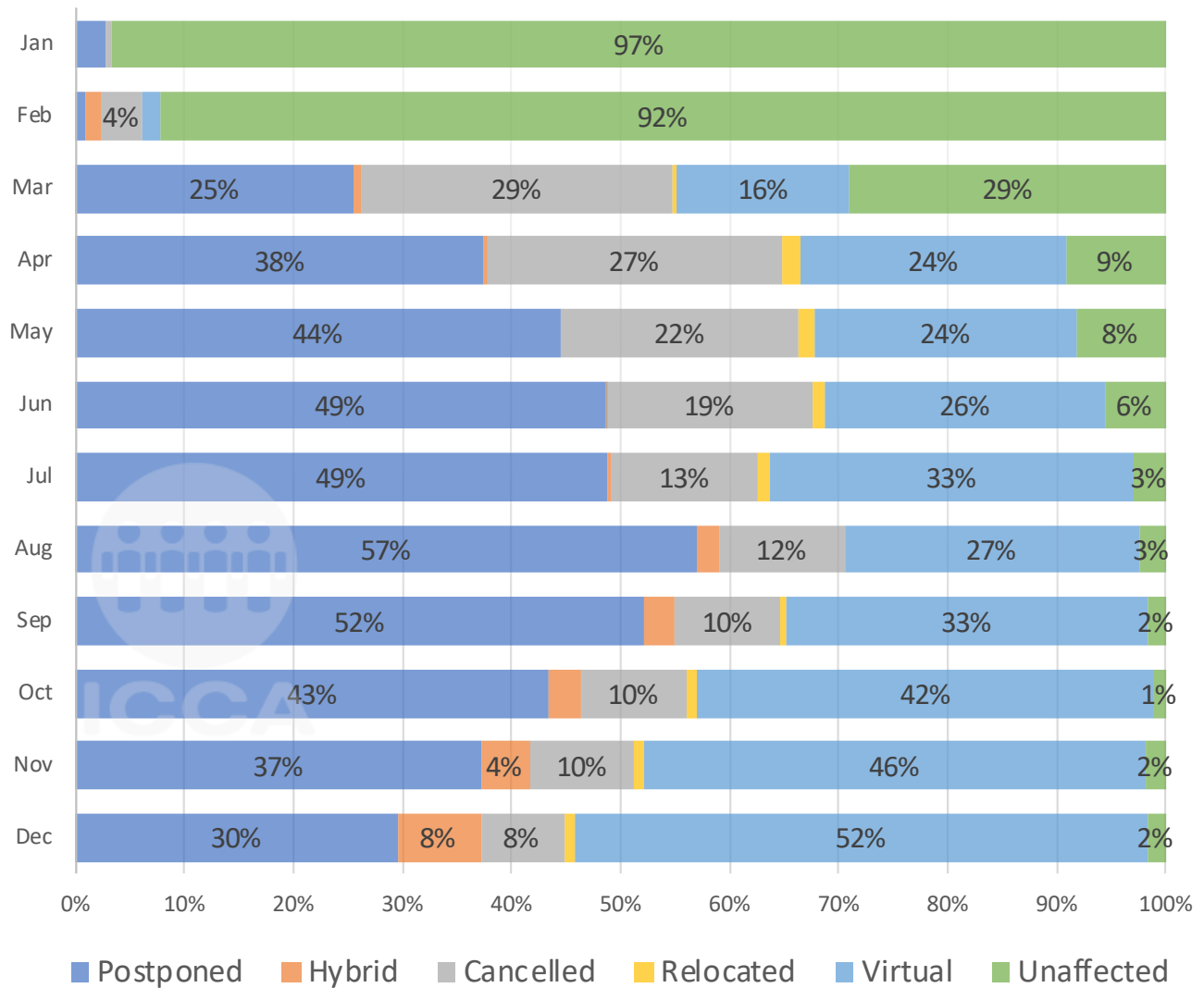


Fig. 2: Affected % of meetings by month (2020)
 Only events with a known month were included (7.807 events)

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Affected number of meetings by month (2020)

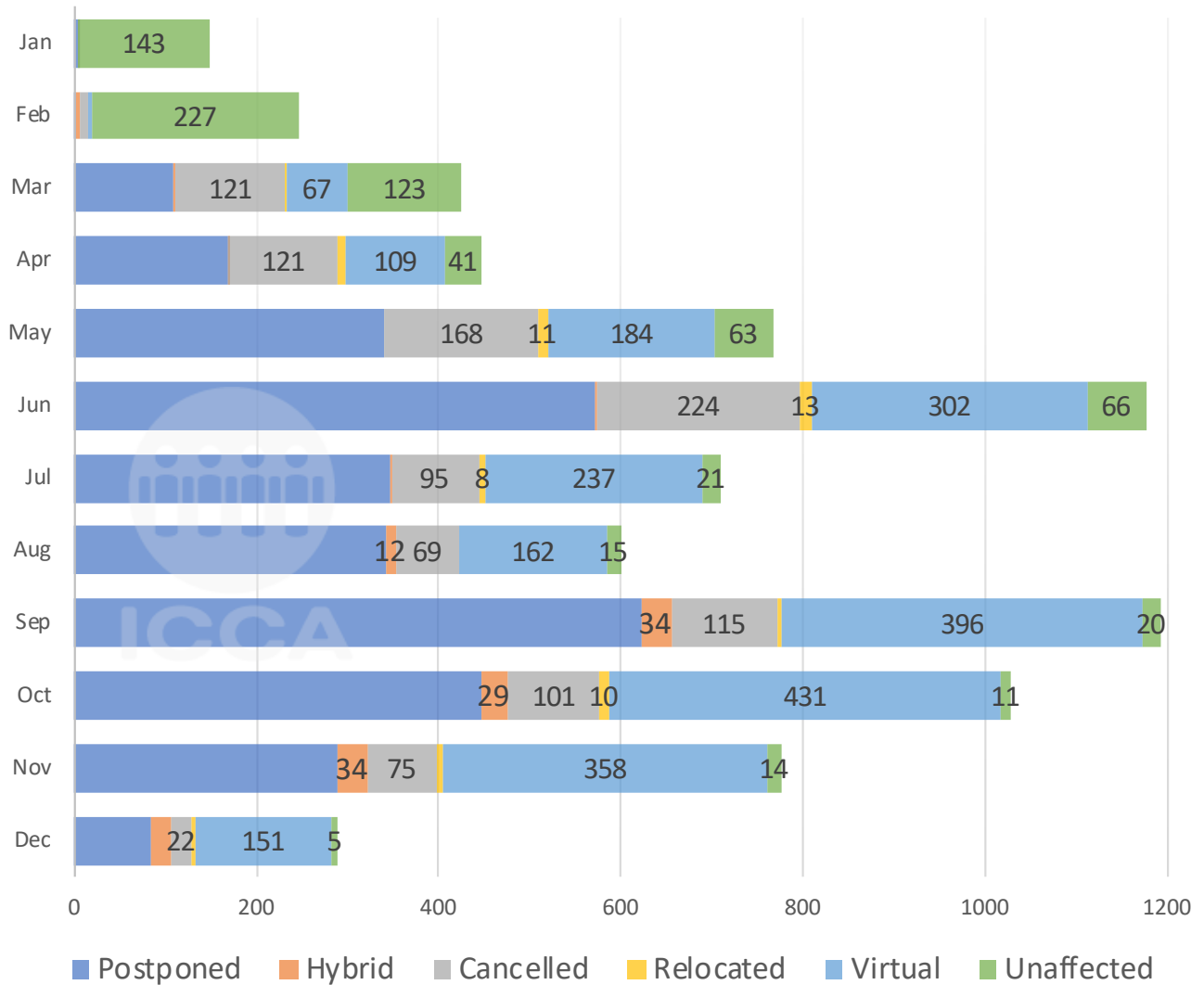


Fig. 3: Affected number of meetings by month (2020)

Total number of attendees by status and month

As opposed to the number of meetings, as seen in Fig. 1, the number of attendees shows that Postponed (38%) and Virtual (37%) meetings make up a similar sized segment of the total number of attendees, signifying that, although the number of virtual meetings was lower than the number of postponed meetings, the number of attendees in these meetings was higher, as was the average number of attendees, see table for average nr. of attendees per status:

Postponed	Hybrid	Cancelled	Relocated	Virtual	Unaffected
420	311	492	943	603	367

Total number of attendees by status

● Postponed	1.558.075 (38%)
● Hybrid	44.452 (1%)
● Cancelled	596.079 (15%)
● Relocated	68.867 (2%)
● Virtual	1.509.460 (37%)
● Unaffected	280.275 (7%)

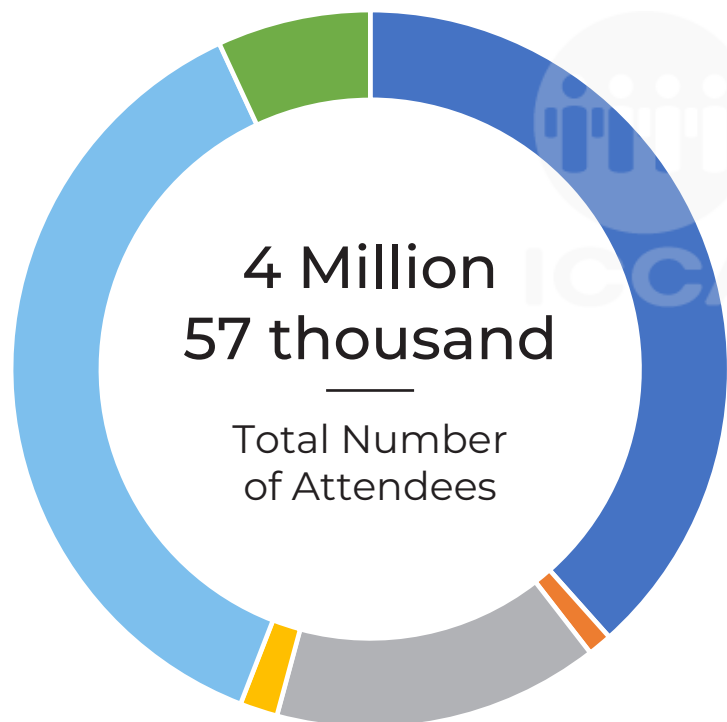


Fig. 4: Total number of attendees by status (2020)

Affected % of meetings by size (2020)

As seen in Fig. 5 below, the majority of smaller meetings (From 50 to 149 attendees) were either Postponed or Cancelled (56% combined) compared to 44% as seen in the largest meetings (From 3.000 and up). As a consequence of this, the percentage of Virtual meetings is highest in the largest meetings (48%).

The consequences of cancelling or postponing large meetings seems much higher compared to smaller meetings and perhaps more resources are available to these associations as they might have more members and therefore larger budgets in order to convert face-2-face meetings into virtual meetings.

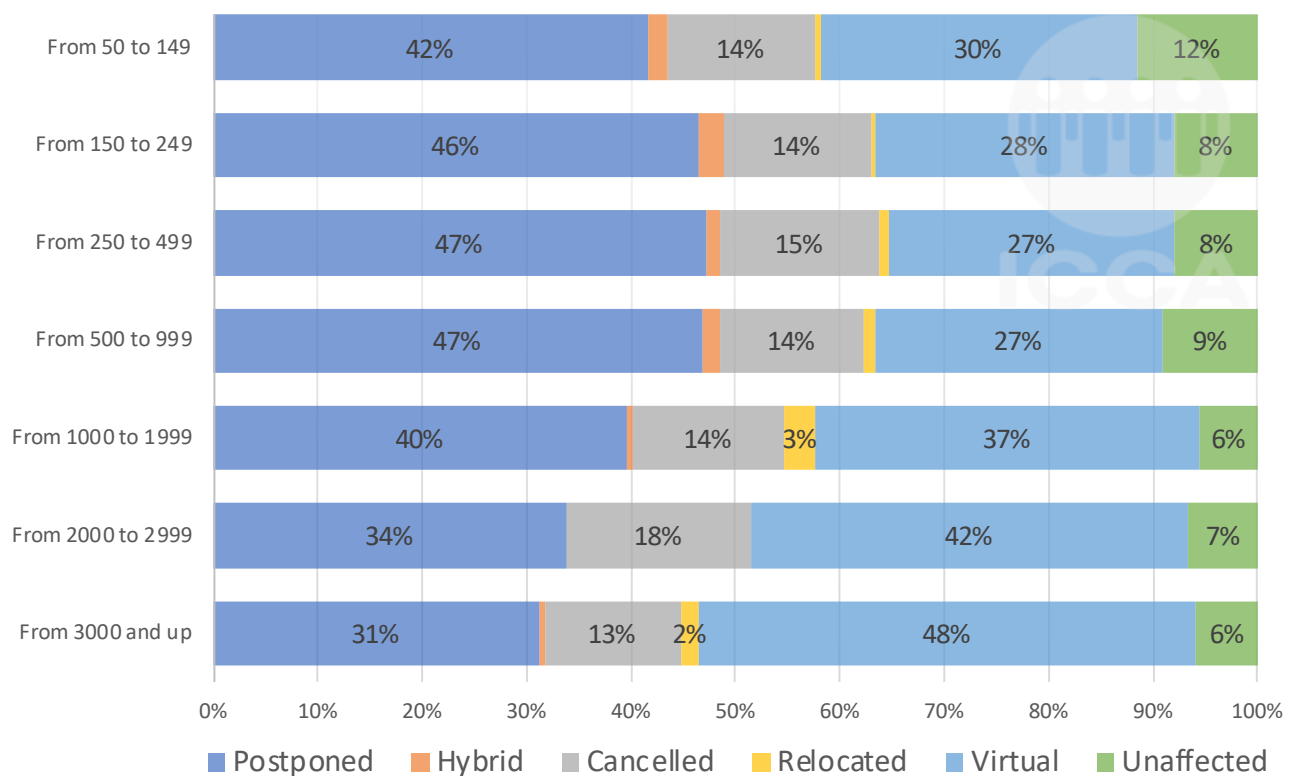


Fig. 5: Affected % of meetings by size (2020)

Affected number of meetings by size (2020)

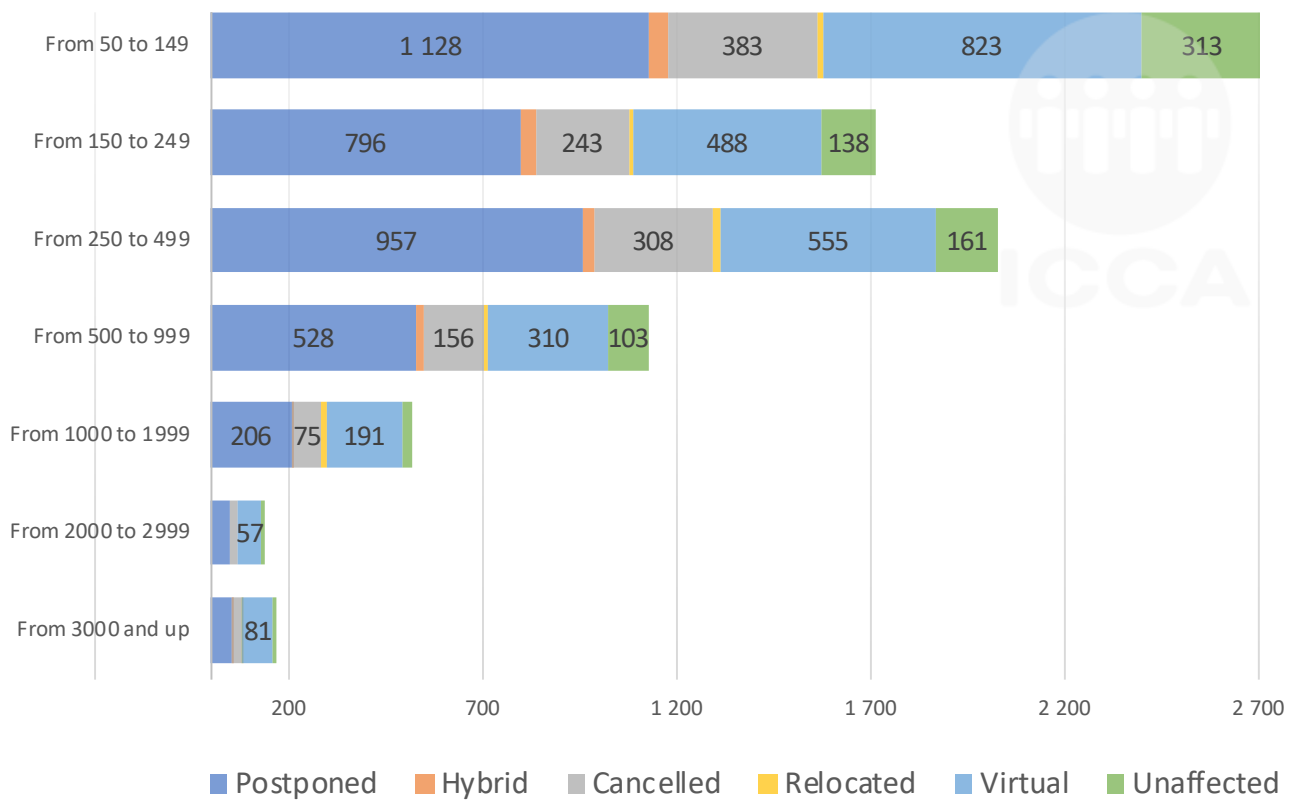


Fig. 6: Affected number of meetings by size (2020)

Affected % of attendees by size (2020)

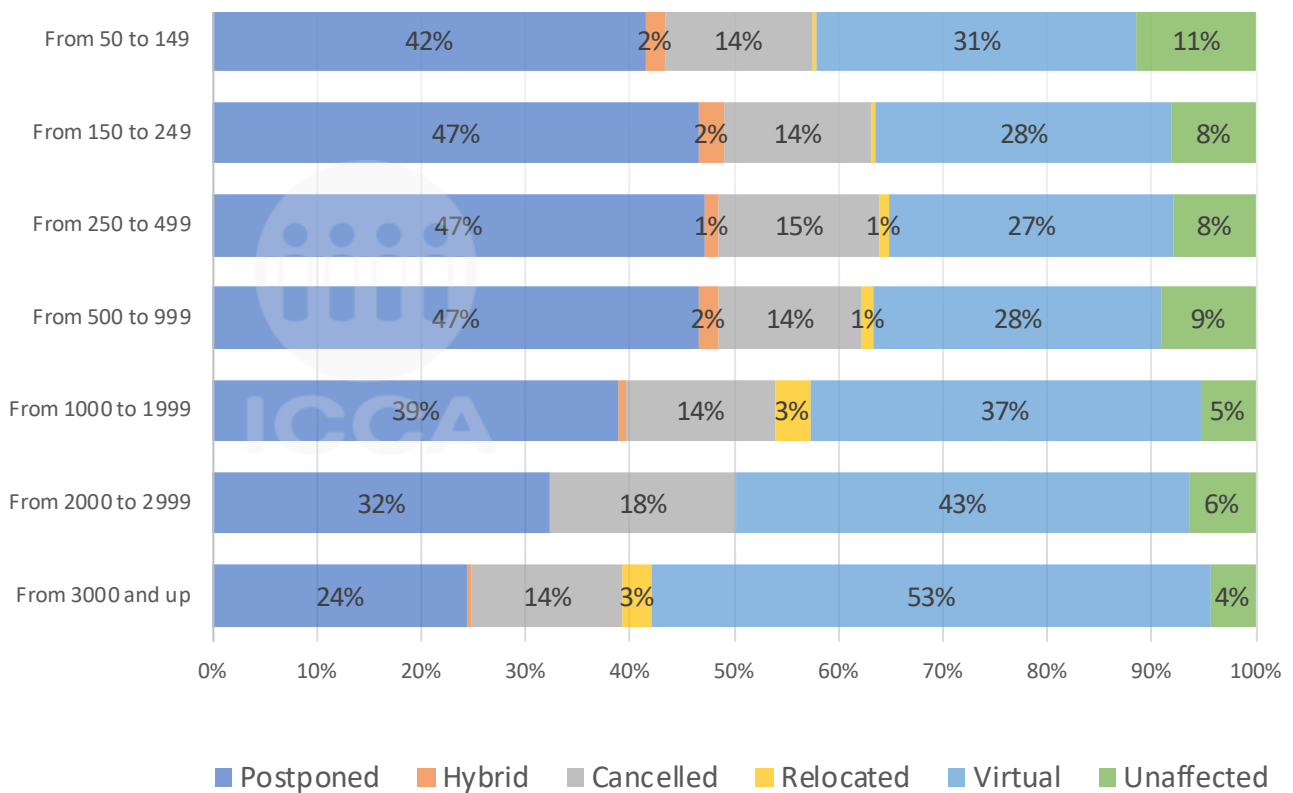


Fig. 7: Affected % of attendees by size (2020)

Affected number of attendees by size (2020)

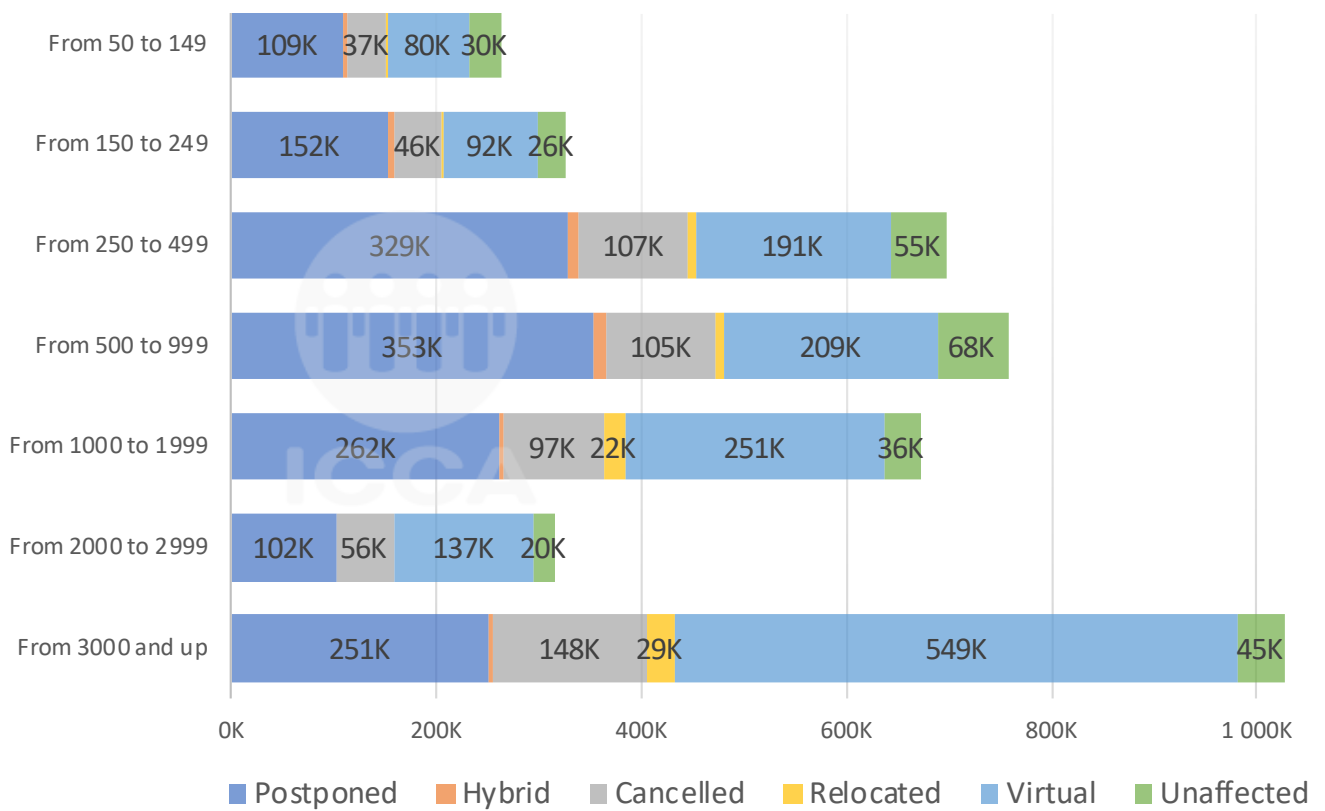


Fig. 8: Affected number of attendees by size (2020)

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Total number of events by region

When looking at the unaffected and affected meetings per region we can observe that the Middle East had the lowest percentage of meetings Postponed and Cancelled (49% combined), which means that 51% of all meetings in 2020 took place, either Unaffected (19%), Virtual (29%), Relocated (2%) or Hybrid (1%); followed closely by North America with a combined continuation-rate of 50% and the highest percentage of Virtual meetings (39%).

% of Total number of events by region and status (2020)

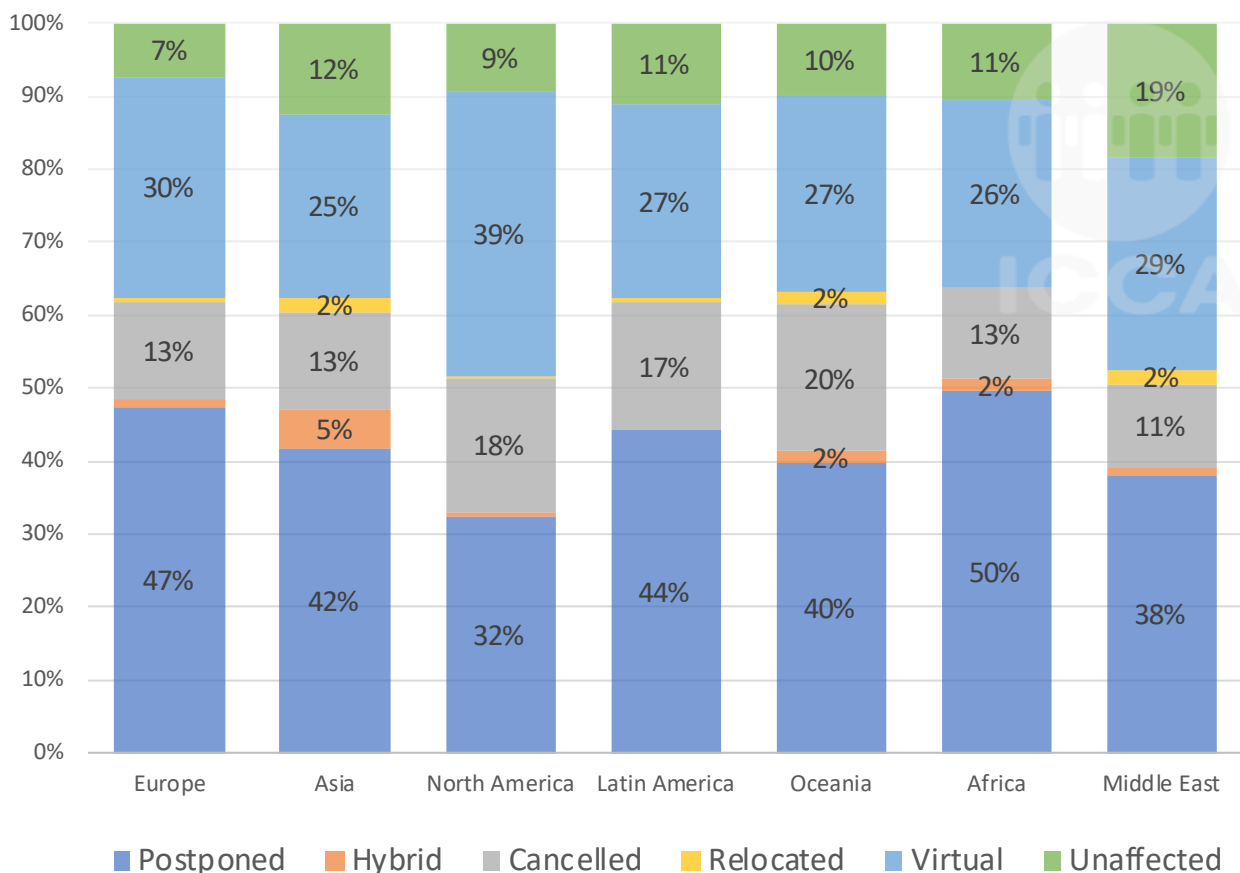


Fig. 9: Total number of events by region (2020)

Total number of attendees by region

In total 51% of attendees attended unaffected, relocated, hybrid or virtual European meetings, the highest percentage of regions. Europe also has the highest percentage of attendees (44%) attending meetings originally planned in Europe, followed by North America with 43%.

Asia is clearly the front-runner with regards to Hybrid meetings with 80 meetings, representing 4% of the total number of events. This might be related to the effect approach from various Asian countries at the onset of the pandemic.

Middle East showed the highest percentage of unaffected meetings (16%) followed by Africa (11%). Perhaps this is linked to the fact that the Middle East and (North) Africa managed to effectively limit the initial spread of the coronavirus.

% of Affected attendees by region and status (2020)

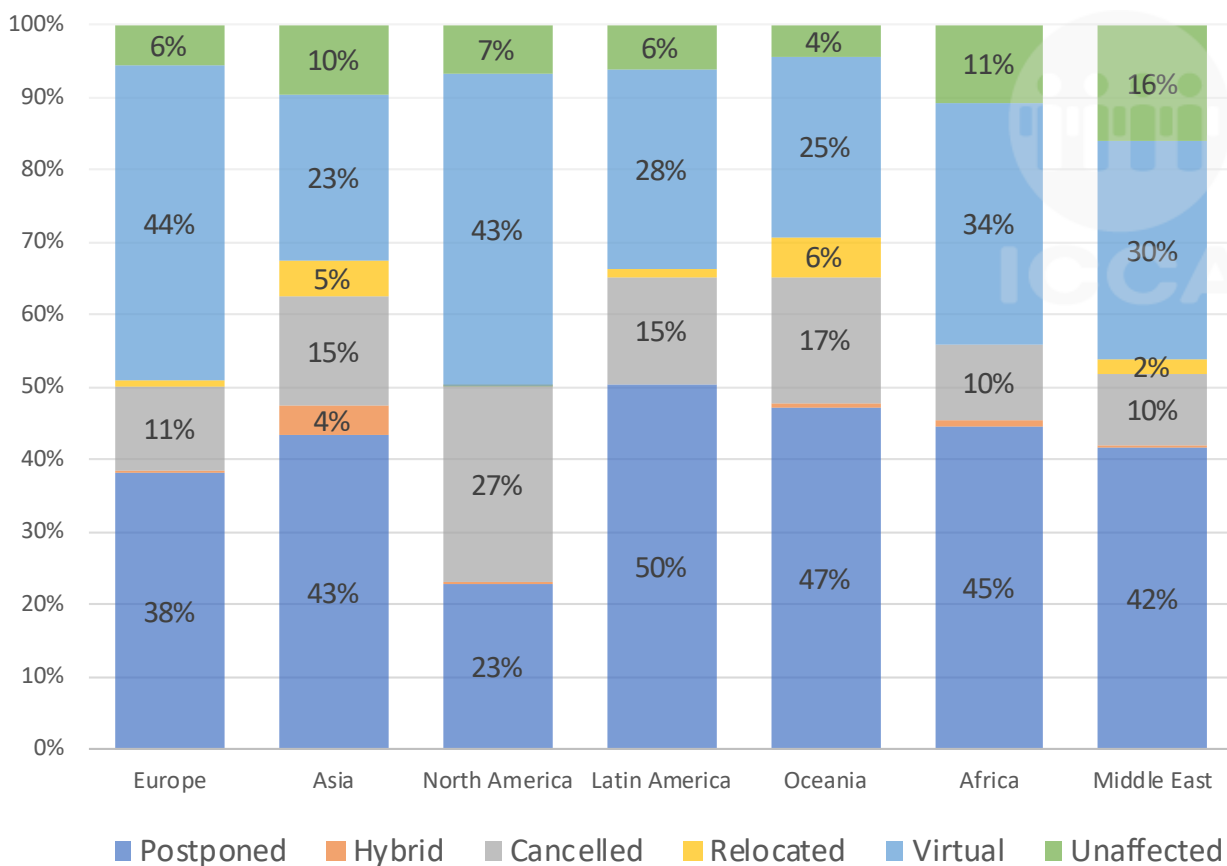


Fig. 10: Total number of events by region (2020)

Total number of events by region and size (2020)

As seen in the table below, 50% of all planned meetings in the Middle East had attendance of 500 and higher. This is by far higher than all the other regions which are in the range between 19% and 32%. In three of the four highest categories the Middle East has the highest percentage of all regions. This might correlate with the hypothesis that larger meetings tend to continue in a virtual format more often than smaller meetings.

Size category	Europe	Asia	North America	Latin America	Oceania	Africa	Middle East	Total
From 50 to 149	1,736 (37%)	397 (26%)	284 (29%)	171 (28%)	63 (24%)	43 (17%)	19 (20%)	2,713 (32%)
From 150 to 249	991 (21%)	311 (21%)	176 (18%)	124 (20%)	46 (18%)	55 (22%)	10 (10%)	1,713 (20%)
From 250 to 499	1,101 (23%)	362 (24%)	238 (24%)	159 (26%)	67 (26%)	84 (34%)	19 (20%)	2,030 (24%)
From 500 to 999	502 (11%)	258 (17%)	157 (16%)	101 (16%)	45 (17%)	38 (15%)	27 (28%)	1,128 (13%)
From 1000 to 1999	217 (5%)	122 (8%)	78 (8%)	47 (8%)	23 (9%)	21 (9%)	12 (12%)	520 (6%)
From 2000 to 2999	62 (1%)	22 (1%)	27 (3%)	7 (1%)	12 (5%)	3 (1%)	3 (3%)	136 (2%)
From 3000 and up	97 (2%)	29 (2%)	20 (2%)	12 (2%)	3 (1%)	2 (1%)	7 (7%)	170 (2%)
Total	4,706 (100%)	1,501 (100%)	980 (100%)	621 (100%)	259 (100%)	246 (100%)	97 (100%)	8,410 (100%)

Fig. 11: Total number of events by region and size (2020).

Total number of events by subject

Of all meetings planned for 2020, meetings with Technology subject matter had the highest percentage of Virtual (48%) and Hybrid (3%) meetings. It might be plausible to assume that associations organizing technological meetings already had more infrastructure and/or know-how to host virtual/hybrid meetings compared to other associations. As a result of this high percentage of virtual/hybrid meetings, these technological associations had the highest continuation-rate, with unaffected (9%), virtual (48%), relocated (1%) and hybrid (3%) events adding up to a total of 61%.

Behind the technological associations, associations which organize meetings with Education subject matter had the second highest percentage of virtual meetings with 32%. Like the Technological sector, the educational sector might already be accustomed to virtual meetings prior to the pandemic.

On the other hand, associations organizing meetings with Science subject matter had the highest cancellation/postponement-rate, with respectively 11% and 55%, totalling up to 66%.

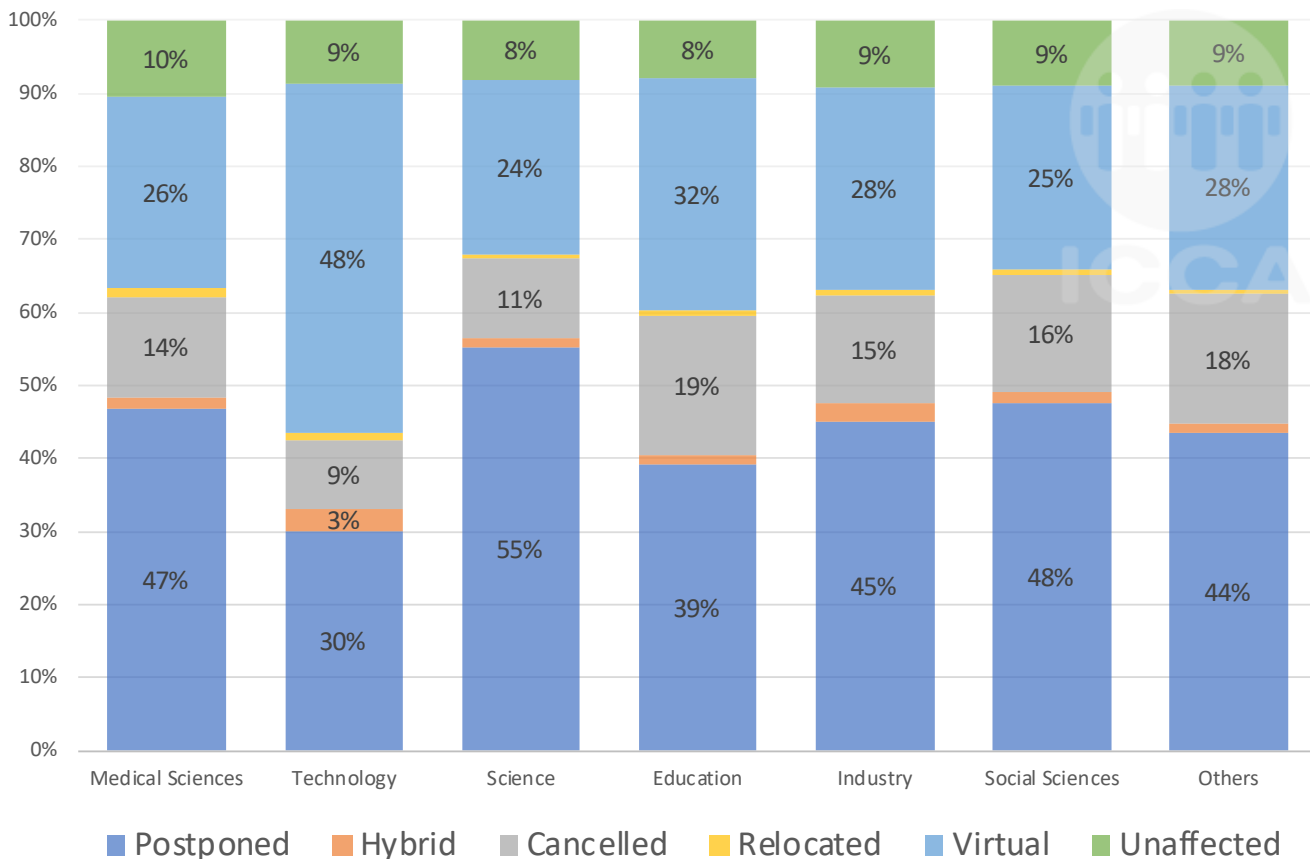
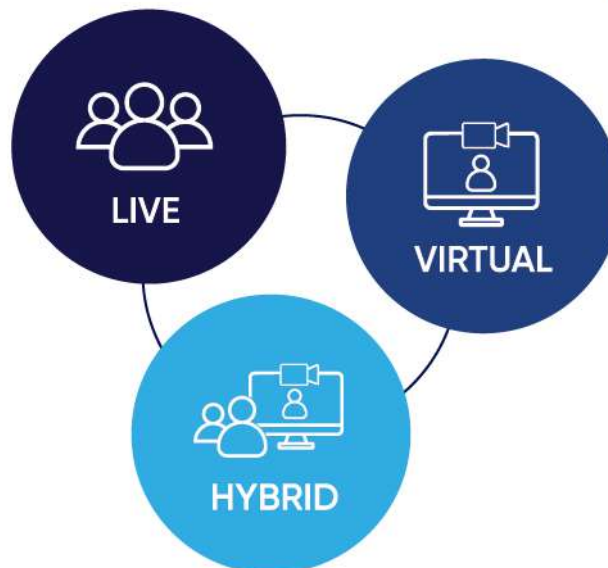


Fig. 12: Total number of events by subject (2020)

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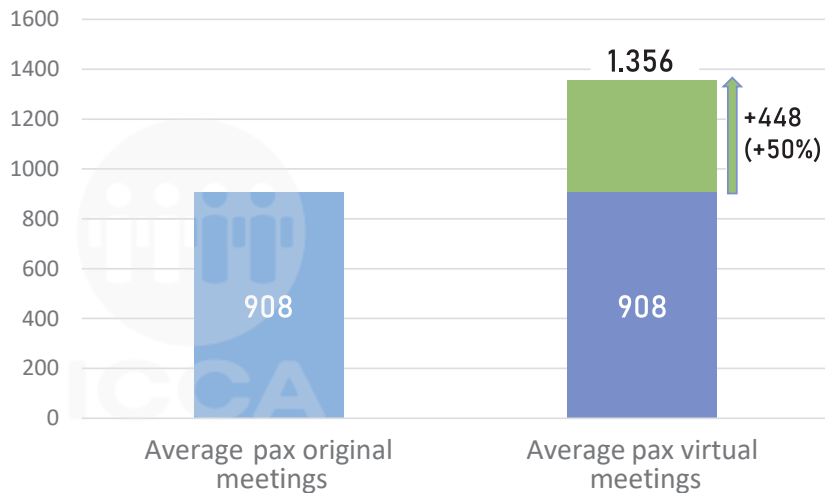
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Hybrid & Virtual meetings

The year 2020 can be seen as the catalyst for the inevitable emergence of Hybrid and Virtual meetings, as a significant amount of associations made virtue out of necessity by converting 2.648 (32%) regular meetings into 143 hybrid (2%) and 2.505 virtual (30%) meetings. This had a significant impact on the economic output of these meetings as hybrid and virtual meetings have a limited impact on the destination itself with regards to travel cost, accomodation, food/drink and other local expenditures. Virtualization of meetings also has an impact on the number of attendees and the registration fees, as can be clearly illustrated in the following graphs.

Average attendance increase: regular vs. virtual meeting



Average registration fee (USD) decrease: regular vs. virtual meeting

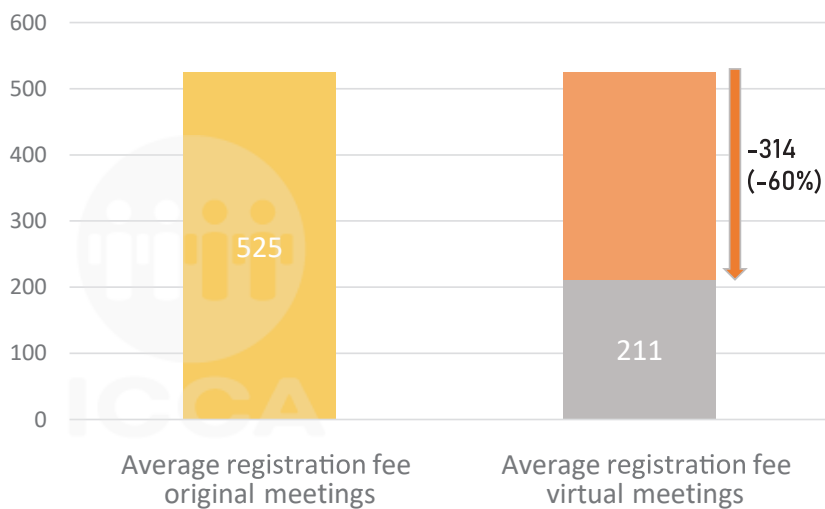


Fig. 13 Average attendance and registration fee: original vs. virtual meetings

Economic impact

The year 2019 resulted in 13,252 unique association meetings representing a total estimated expenditure of \$10.817M. It will come as no surprise that the COVID-19 pandemic has decimated the economic output for the year 2020, with 8,409 meetings planned of which 3,484 actually took place: unaffected (763), virtual (2,505), relocated (73) and hybrid (143). In the following calculation we will hypothesize how the decrease in the total estimated expenditure can be explained.

2019 Estimated Total expenditure	Based on 13,252 meetings	\$10.817M
Loss due to volume effect	2020 had 4,843 meetings less compared to 2019. This represents a loss of \$3.953M	- \$3.953M
Loss due to cancelled meetings	Of the 8,409 planned meetings in 2020, 1,211 were cancelled. This represents a loss \$0.988M	- \$0.988M
Loss due to postponed meetings	Of the 8,409 planned meetings in 2020, 3,714 were postponed to 2021 or beyond. This represents a loss of \$3.032M	- \$3.032M
Virtual/Hybrid expenditure loss and others	Virtual & Hybrid meetings have a lower Economic impact compared to face-2-face meetings. In addition, fluctuation in average registration fee and average attendance between 2019 and 2020 are incorporated in this amount.	- \$1.179M _____ +
2020 Estimated Total Expenditure	Number of unaffected/relocated meetings: 836 Average number of attendees for unaffected/relocated meetings: 418 Average registration fee for unaffected/relocated meetings: \$571 Estimated total expenditure for unaffected/relocated meetings: \$907M Total number of virtual & hybrid meetings is: 2,648 Average number of attendees for virtual/hybrid meetings is: 1,356 Average registration fee for virtual/hybrid meetings is: \$211 Estimated total expenditure for virtual/hybrid meetings: \$758M Estimated total expenditure for unaffected/relocated/virtual/hybrid meetings: \$1.665M	\$1.665M

**Note: The average total expenditure presented in this table is calculated based on the assumption that 22% of the total delegate expenditure is spent on the registration fee.*

Economic Impact of COVID-19 on Total Expenditure: 2019 vs. 2020

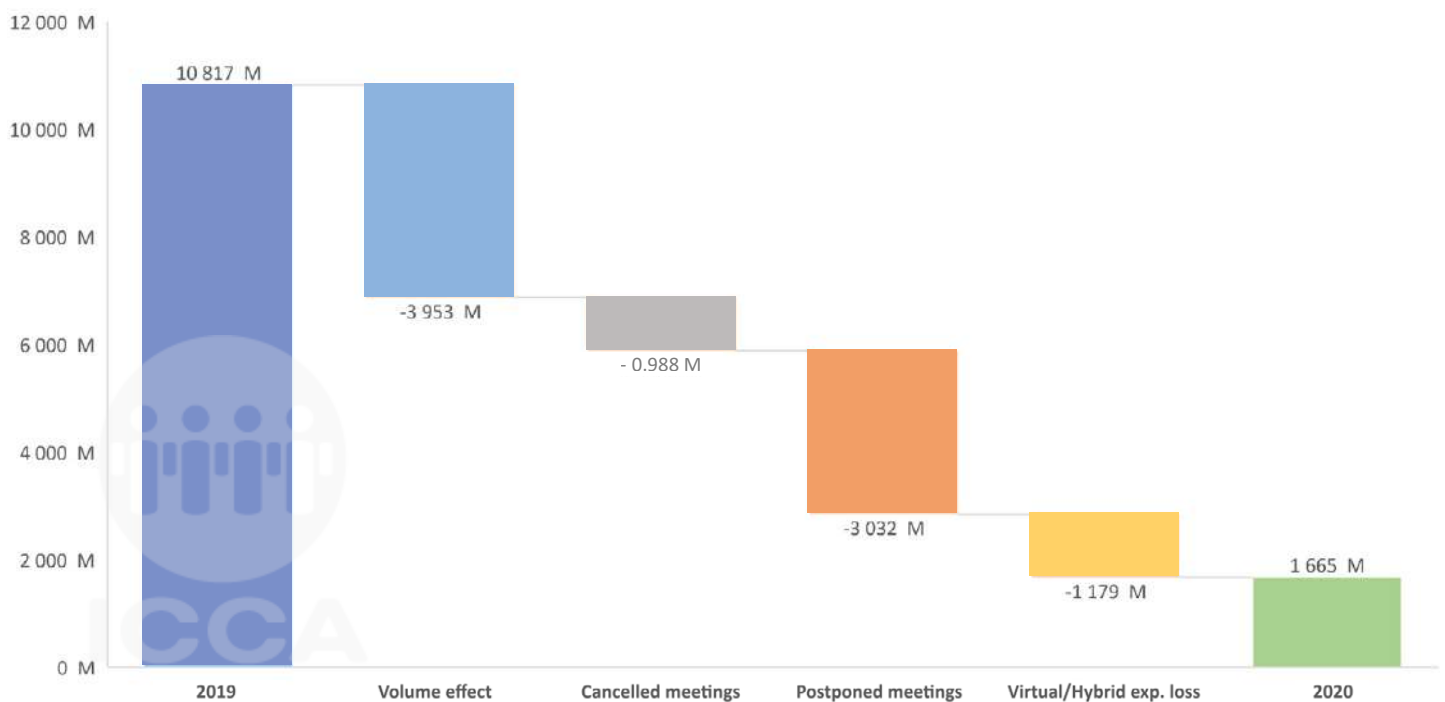


Fig. 14 Economic Impact of COVID-19 on Total Expenditure: 2019 vs. 2020

This graph displays a breakdown of the decrease in estimated total expenditure due to the pandemic. As a reference point, we are using the estimated total expenditure for the year 2019.

The decrease can be broken down in four segments: Volume effect (less meetings planned for 2020 vs. 2019), decrease of expenditure due to cancelled meetings and postponed meetings and, finally, decrease due to the fact that Virtual/Hybrid meetings result in less expenditure, such as travel/accommodation costs.

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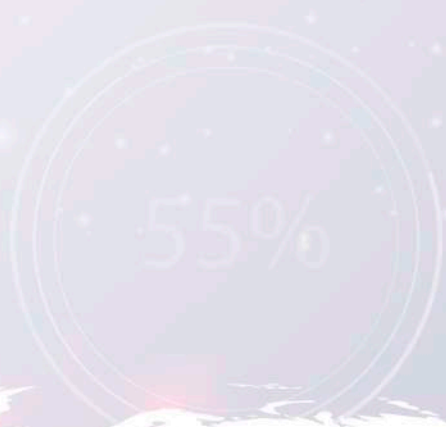
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