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FUTURE MEETING SPACE

THE FUTURE ROLE AND PURPOSE OF BUSINESS EVENTS

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GCB

Meetings made in Germany

●●● German Convention Bureau

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1 STATUS QUO

1.1 The importance of meetings and conferences

Meetings, conferences and events are platforms for the exchange of know-how, experiences and ideas, providing vital inspiration for political, economic, scientific and social processes, thus promoting innovation and new solutions.

In Germany, meetings and conferences play an important economic role: In the International Congress & Convention Association's (ICCA) 2019 ranking of European meeting and convention destinations the country ranks first for the 15th time in a row. Globally, Germany ranks second behind the USA, as in previous years. Around three million events with over 420 million participants took place in Germany in 2019. The systematic analysis of megatrends and topics that are relevant for the future is an important basis for keeping the country's leading position as a destination for meetings and events.

1.2 The current situation as influenced by the Covid-19 pandemic

The Covid-19 pandemic hugely impacts the events sector. Meetings, conferences and congresses were and are particularly affected by the current restrictions to control infection, as they have so far been largely based on face-to-face interaction and physical gatherings. As a result of the pandemic, events have been cancelled or postponed in large numbers since March 2020. The number of participants has dropped significantly and there are losses in turnover as well as the threat or actual loss of jobs.

While the pandemic illustrates the fragility of established systems it also shows how a change in circumstances can lead to quantum leaps in many areas. Especially with respect to digitalisation and hybridisation, the pandemic turned out to be an accelerator, inspiring a wide range of new solutions. Within a very short time, events shifted from the physical to the virtual space. It is expected that the learnings and experiences of the pandemic will lead to lasting changes in the events sector – both from a quantitative and a qualitative perspective – and, for example, drive digital formats. Innovative event formats, services and business models are therefore of fundamental importance for a future-proof event industry.

1.3 The "Future Meeting Space" innovation network

The "Future Meeting Space" innovation network systematically anticipates relevant developments in the event industry in order to identify indications for future requirements with regard to event organisation, technology and spaces. Together with other partners, the innovation network not only outlines developments and opportunities, but also provides specific recommendations for action, with the aim of making a significant contribution to the further development of the industry.

This study focuses on meetings and conferences for business purposes where people come together to exchange experiences, know-how and ideas, generate knowledge and build networks. Throughout this report, different terms, such as event industry or event sector, are used synonymously when talking about the ecosystem around all kinds of business events.

1.3.1 The initiators of the innovation network

The "Future Meeting Space" (FMS) innovation network was launched by the GCB German Convention Bureau in cooperation with the Fraunhofer Institute for Industrial Engineering IAO. The research project focuses on trends, innovations and social developments, identifying their possible influence on the event industry. In this context, research questions focus on how future events should be designed and how participants' needs develop as well as on the requirements that result from these aspects for all those involved in the event planning process.

1.3.2 The partners of the innovation network

The following research partners supported the project's third phase from 2019 to 2020 with their research contributions and expertise:

- KFP Five Star Conference Service GmbH
- SevenCenters of Germany
- Flughafen München GmbH
- Mesago Messe Frankfurt GmbH
- RHG – Radisson Hotel Group
- XING Events GmbH
- Maritz Global Events
- EVVC e. V.
- PCMA Education Foundation



Fig. 1: Organisation chart of the innovation network.

1.3.3 Objectives of the innovation network

The project aims at developing ideas, concepts and practical advice for the ongoing development of the German event industry, thus providing an important building block to expand the country's future competitiveness and market position as a meetings and conference destination by securing innovation leadership. The following guiding questions have been at the centre of the innovation network's work since the first research phase:

- Which developments are important for organisers, venue operators, investors, suppliers and service providers, but also for destinations in order to plan and organise successful events in the future?
- What are future-proof event formats and what kind of new requirements do they come with?
- How can participants with their individual requirements be placed at the centre of events and their needs be taken into account as a central component of an event's objectives?

Together with innovative technology companies, solution providers, forward-thinking event organisers and destinations, the FMS innovation network analyses these questions in all their complexity.

1.4 Summary of previous research phases

In the first project phase from 2015 to 2016, the innovation network's research partners identified and analysed developments in the fields of society, methodology, technology, mobility and infrastructure with their respective effect on the events sector.

In the second research phase, we focused on identifying types of participants at events, how they differ in essential criteria as well as whether and how the use of different methodological and technological elements affects the different types with respect to various aspects, such as knowledge transfer or learning and how events are accepted and experienced.

Summaries of the results of the FMS research so far are available

www.future-meeting-space.de

1.5 Research phase 2019/2020: The future role and purpose of business events

1.5.1 Objectives and research questions

In the most recent research phase, the innovation network looked at the future role of events in the communications mix of organisations. The aim was to develop future scenarios for the role of events, to describe the resulting success factors and prerequisites, and, based on that, to identify how requirements for events, organisations, event venues and the skill set of staff change. In order to be able to measure the success of future events considering the changed requirements, new success factors (Key Performance Indicator - KPI) have also been established. This research phase was built on the following questions:

- What role will events play in the communications mix of organisations in the future?
- Based on this, how will requirements and skill profiles change?
- How can events be measured using success factors and prerequisites?

In order to answer these questions in the best possible way, the researchers chose a complementary combination of qualitative, empirical and prospective research methods. The following chapter explains how these methods have been applied.

1.5.2 Methodology

By way of an explorative approach, the first step was to develop so-called user stories in focus groups with event participants and events experts in order to identify requirements that events will have to fulfil in the future and as well as define their future role.

The user stories were then analysed on the basis of the dimensions of customer satisfaction and enthusiasm from the Kano model in order to describe the connection between the achievement of certain characteristics of a product or service and the expected satisfaction and enthusiasm of users. The Kano model differentiates between five quality levels, i.e., basic, performance, enthusiasm, rejection and irrelevant features. If a product or service is classified as a basic features, the basic requirements are covered. Performance features create satisfaction depending on the degree of fulfilment. Enthusiasm features describe features that are not expected by the users but trigger great enthusiasm. Rejection features lead to dissatisfaction when present, but not to satisfaction when absent. Irrelevant features are of no concern to users. In order to carry out valid research, the user stories were mirrored in a quantitative

empirical online survey within the framework of the dimensions of the Kano model. The views of three groups were included, i.e., participants, organisers/planners and service providers/ infrastructure providers.

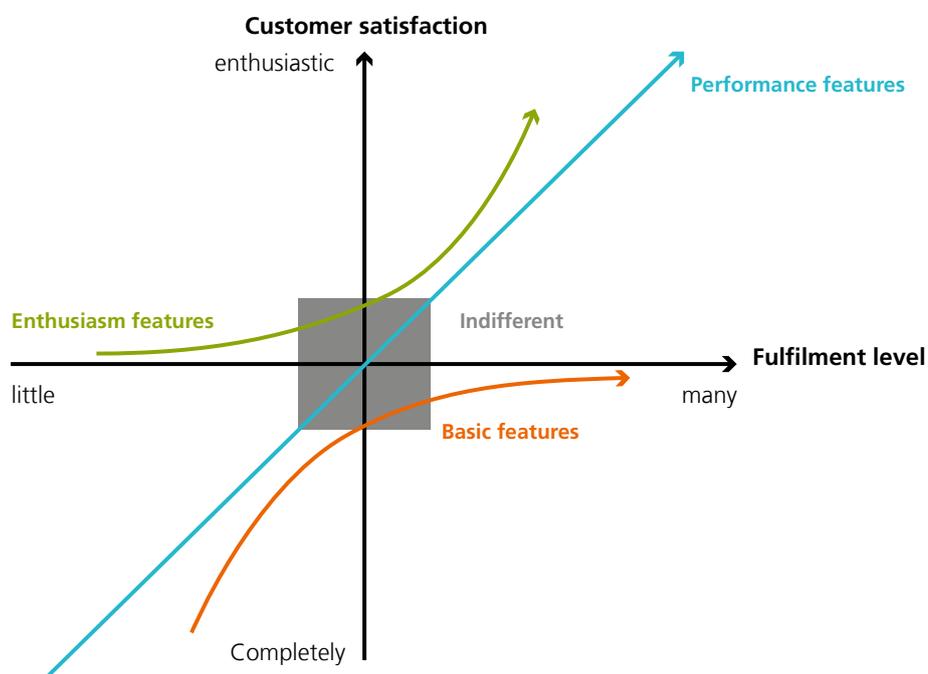


Fig. 2: Graphic representation of the Kano model according to Noriaki Kano

In the next, explorative step, assumptions were developed based on the results of the Kano survey to outline future scenarios in focus groups and with the research partners. These assumptions were verified by experts in a one-stage Delphi survey by way of a systematic questioning procedure. The main purpose of this feedback element was to be able to assess future events, trends and technical developments as best as possible.

The last research step consisted of processing and interpreting the results of the Delphi study, of outlining how the role of events for organisations will change in the future and of establishing and describing the resulting success factors, prerequisites, changing requirements and skills profiles for events, organisations and people.

STATUS QUO

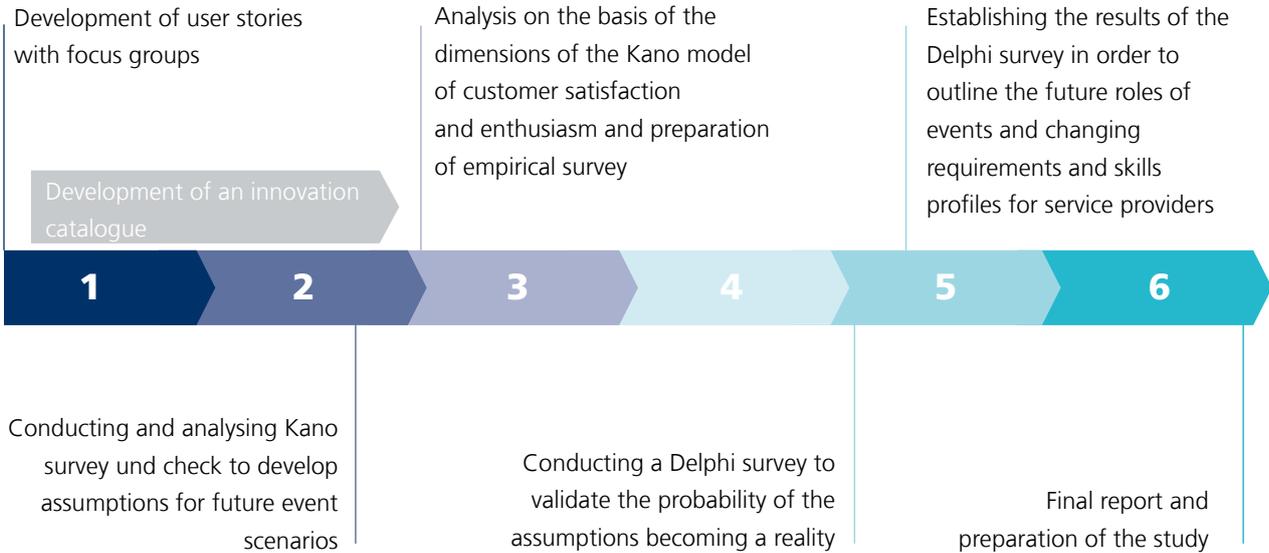


Fig. 3: Research process of the third research phase.



2 PARTIAL RESULTS

The following section describes the partial results of the study. We first analyse the role of future events in the communications mix of organisations on the basis of changed customer needs and wishes. In the next step, we discuss the resulting requirements and skills profiles of the different stakeholder groups and the changed factors in order to be able to measure the success and effectiveness of future events.

2.1 Kano survey: Which new offers/features will excite the participants of future events?

The Kano survey was conducted in June 2020 with close to 500 participants, mainly the DACH region (Germany, Austria, Switzerland). Generation X (1966-1980) accounts for the biggest share of participants with 42.1 percent, followed by Generation Y (1981-1995) and Generation Z (born 1996 or later) accounting for one third of the participants.

Age groups of survey participants

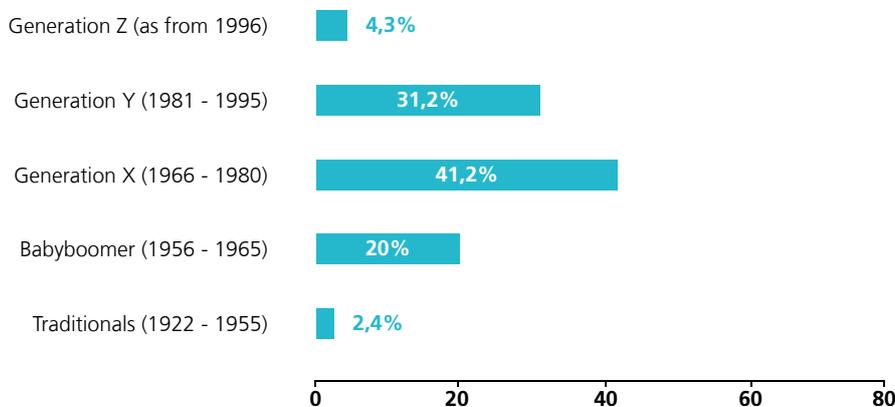


Fig. 4: Kano survey: age groups of participants.

n = 499

Three groups contributed their perspective:

- Participants (30.4 percent)
- Event organisers and planners (43.1 percent)
- Services and infrastructure providers, such as catering, event technology and venues (26.5 percent)

The participants segment answered the first part of the survey. They were asked about finding and registering for the right event, co-creation opportunities and technical innovations, event experience and venue, as well as the learning effect of events. The other two groups were each given another set of questions to test specific features developed for these groups.

Survey participants by category

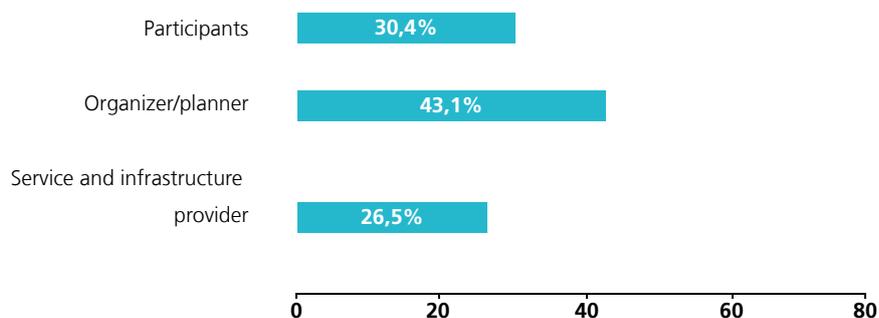


Fig. 5: Kano survey: participants by category. n = 499

Respondents from the event, tourism and hotel industry accounted for the highest share with 50.9 percent. 45 percent of those come from companies with up to 50 employees.

In the following section, we present the survey results and consider them from all three perspectives. Approval or disapproval ratings of 20 percent to 30 percent indicate strong trends and show meaningful characteristics.

2.1.1 New features from the perspective of participants

Comparing and registering for events

Online platforms have become increasingly successful in recent years due to advancing digitalisation and networking processes. In the market, they take on the role of an intermediary that "enables the interaction of different groups" and thus reduces search and transaction costs.¹

Being able to compare business events and easily register for them is also important for the participants of the Kano survey. 35.5 percent are enthusiastic about the idea of a platform that lists all business events worldwide and suggests suitable events using a filter function.

For about half of the respondents, it is extremely important to be able to book business events on current topics at short notice. They classify this as either a basic, enthusiasm or performance feature. 14.1 percent even see it as a basic feature. In order to be able to participate at short notice, they would accept that a large part of the participants and speakers participate virtually.

The fact that a comparison platform for business events achieves such high ratings shows how natural it already is for customers to use such a tool in other sectors, for example, for hotel bookings. Within six years, hotel online platforms were able to increase their share as a possible booking channel by almost 9 percent (from 20.9 percent in 2013 to 29.7 percent in 2019). It can therefore be expected that the same principle will also be transferred to the events sector.

1 See Hildebrandt, Arnold, 2018

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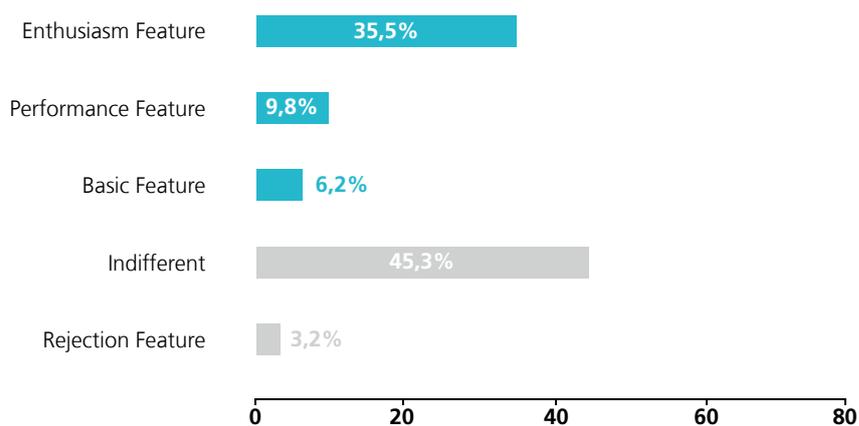


Fig. 6: Results of the Kano survey: digital comparison platforms.
n = 499

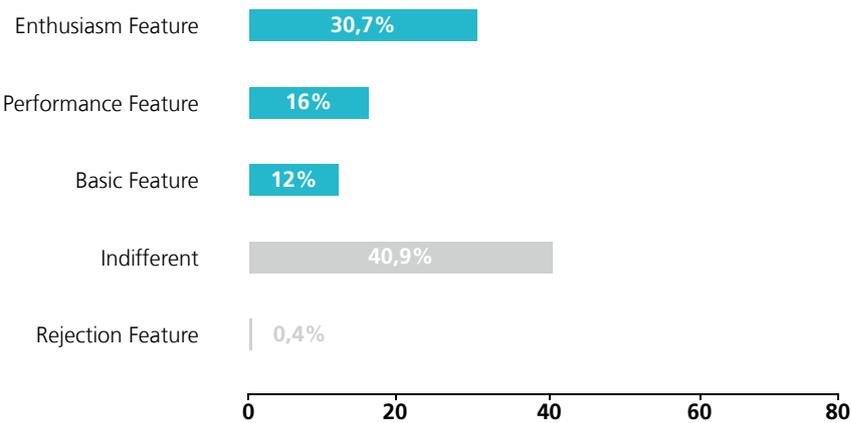


About half of the participants (51,5 percent) want easy comparison platforms.

The respondents were furthermore presented with idea of linking the ticket price for an event with how participants travel there (i.e., sustainable travel = cheaper event ticket). This suggestion does not fully convince: While 19.9 percent are very enthusiastic about the idea of promoting environmentally-friendly travel, 24 percent reject it completely. This reaction illustrates how divided society is when it comes to climate protection measures and how differently people think about changing their lifestyles and personal value systems.

Event experience

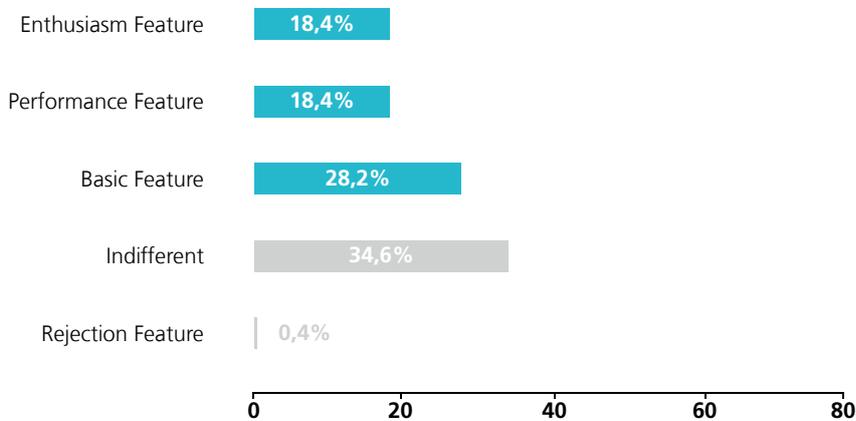
Experiences and the concept of communities are of increasing importance in today's society. The values of an experience-driven society are also reflected in our survey results: 58.7 percent of the respondents want a holistic event experience, meaning that the various components of events (programme, venue, services) should fit together thematically. 30.7 percent even classify this aspect as an enthusiasm feature according to the Kano classification.



 In total ~ 60 percent want holistic event experiences.

Fig. 7: Results of the Kano survey: holistic event experience. *n* = 482

Digital platforms and social networks enable a new kind of participation in socio-political processes. This also increases the desire of event participants to get involved and participate.² 29.8 percent of those surveyed would be thrilled if events provided more opportunities to participate. They want to be able to suggest speakers and then vote on potential speakers and items on the event agenda. Additional information on the individual programme items (e.g., required prior knowledge or learning objective) is already seen as a basic feature (28.2 percent).



 A great majority (65 percent) wants additional information.

Fig. 8: Results of the Kano survey: additional information on programme. *n* = 485

PARTIAL RESULTS

15 percent consider it a performance feature to highlight local specifics of the respective event location through an app, and almost a quarter of the respondents would even be enthusiastic about an event app with regional recommendations. In addition to informative articles, this app should be equipped with a chatbot that can answer all important questions about the event. Apps not only improve the flow of information: If there is a parallel social media conversation, the exchange between the participants and with the organisers and speakers can also be increased. Apps, thus, promote the exchange of experiences and knowledge transfer, they promote cooperation on-site and increase the commitment and personal responsibility of the participants.

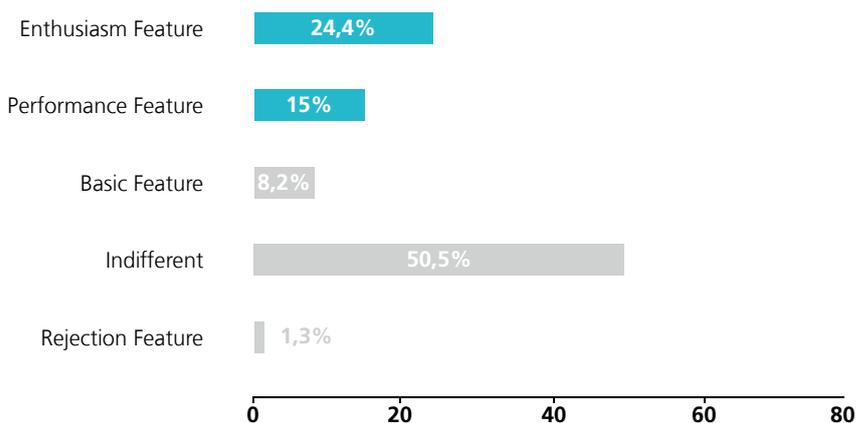
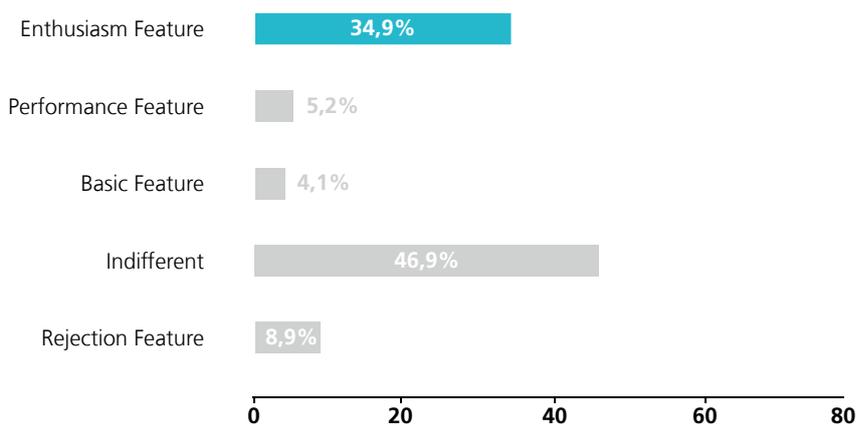


Fig. 9: Results of the Kano survey: additional information about local attractions.

n = 479

 Up to 40 percent sees information about local attractions as helpful.

34.9 percent are also enthusiastic about the idea of additional regional events alongside the main event, which take place simultaneously in different locations, so that the number of participants is smaller, creating a more "homely" atmosphere. Such an event format can support the local economy outside big cities and enrich the actual event.



 A third (34,9 percent) is enthusiastic about the benefits of regional side events.

Fig. 10: Results of the Kano survey: additional regional events.
n = 482

Social profiling

The survey showed differing opinions about the idea of providing personalised event suggestions based on profiles in professional and private networks: While 23.4 percent of respondents would be thrilled to be shown events based on such social profiling that match their interests and where they can meet people they can relate to, 22 percent reject this idea. Data protection seems to be more important to them than sharing their data with third parties.³ Other scientific studies also confirm these findings. A study on the development of enterprise social networks in large companies shows that attacks carried out on the internet due to data protection gaps are now perceived as a greater risk than in the past.⁴

The possibility to meet people from one's own social media network face-to-face while travelling to events, e.g., on the train, would be an extension of this social profiling approach. While 26.2 percent of the respondents express their enthusiasm about this idea, 17.6 percent are rather reserved.

In general, respondents prefer to socialise at the events they attend. More than a third would welcome if networking on-site was actively supported. 22 percent would be thrilled if organisers on-site would encourage and initiate socialising more than in the past. 8 percent classify this aspect as a performance feature, just under 7 percent as a basic feature.

³ See Häder, Häder, 2000; Linstone, Turoff, 2002

⁴ See Daum et al., 2020

Facial recognition and tracking

Facial recognition software can enable access to an event without waiting and queuing. A large proportion of respondents are dismissive of this. The rejection relates to both registration and accessing personal lockers through face recognition. Respondents make it very clear that they reject facial recognition as a means of increasing convenience at events, with 53 percent not wanting to be admitted via facial recognition and 18.8 percent also rejecting this for lockers which feature a charging facility for their technical devices.

The general rejection of facial recognition, often called an "innovation of the future", can be explained, among other things, by a high level of mistrust towards data security, which is apparently not yet guaranteed for many respondents. On the other hand, a loss of personal freedom is associated with this type of technology. This may make general acceptance at events more difficult in the future – at least in the context of a supposed or even real experience of convenience.

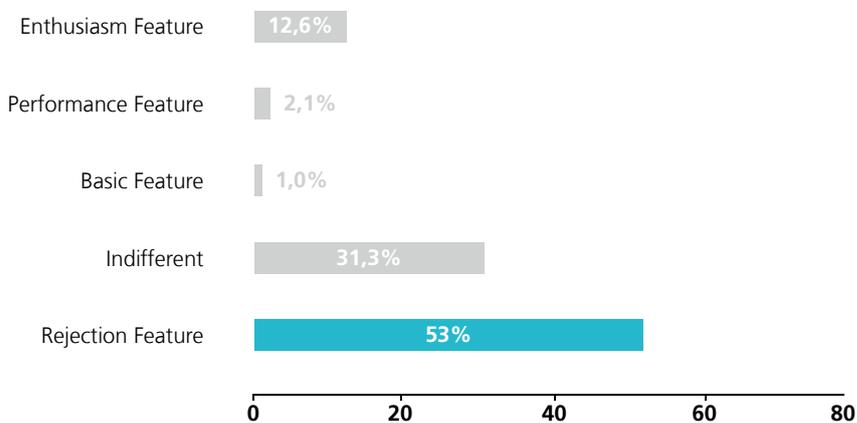


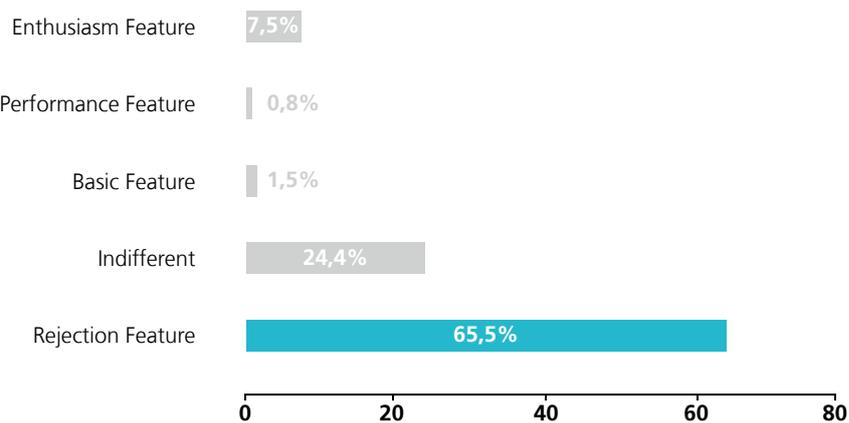
Fig. 11: Results of the Kano survey: facial recognition.

n = 485

 More than the half (53 percent) don't want their face to be recognized.

Another innovation shows an even stronger rejection of the use of very personal (health) data: With 65.5 percent, a clear majority of respondents rejects being equipped with a tracker that measures wellbeing and passes on the data for regulating the environment, e.g., to a building management system that reacts with different lighting should it be detected, for example, that the majority of participants becomes less alert and generally tired. Something that has already been used for some time by consumers for personal purposes seems to meet with resistance here. According to a study by Techniker Krankenkasse (German health insurer), more than 27 percent of those surveyed use digital tools such as fitness trackers, heart rate monitor watches

or online health coaches. For a study on digital health literacy, the market research institute Forsa surveyed a population-representative cross-section of adults between the ages of 18 and 70 in Germany in January 2018.⁵ The results show that trackers are popular for measuring one's own personal fitness success, but that the use of trackers involving the disclosure of personal data to third parties is viewed critically. Consumers fear a loss of control over the handling of their data collected online.⁶



 The vast majority (~ 65 percent) dislikes the idea of usage of their well-being data

Fig. 12: Results of the Kano survey: measuring wellbeing. n = 479

Virtual reality and livestreams

The respondents are less critical of innovations such as virtual reality and livestreams. 39.1 percent are enthusiastic about virtual group experiences taking place in real, physical spaces without having to wear VR glasses. Given the shift from physical to virtual spaces, the respondents have already made their own first positive experiences with this technology, although this was often marred by the lack of informal, spontaneous encounters between the participants. VR experiences as a group, also to enable networking with virtual participants, are therefore of great importance to the respondents and would clearly be an inspiring experience for them.

⁵ See *Techniker Krankenkasse*, 2018

⁶ See *Verbraucherzentrale*, 2020

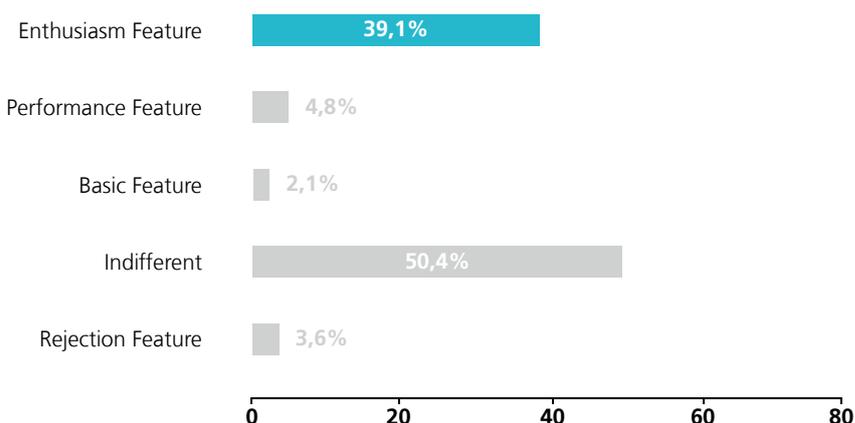


Fig. 13: Results of the Kano survey: Virtual experiences without VR glasses. n = 478

 39,1 percent are enthusiastic about this possible innovation for events.

The feedback on using livestreams to follow talks and presentations irrespective of location reflects the general positive attitude about being more independent of physical spaces: 37.3 percent of the respondents were in favour of using such technological tools.

Event venues

40.9 percent of respondents would be enthusiastic about event locations featuring natural elements such as gardens, grass floors and water features and 9.5 percent rate such designs even as a performance feature. A similar picture emerges for the idea of using flexible and diverse seating options (e.g., corner sofas, round tables, swing seats) instead of conventional rows of seats when attending talks and presentations: 36.9 percent classify such flexible seating as an enthusiasm feature, 9.5 percent as a performance feature. This means that, with relatively few resources, event venues can be made highly attractive for participants.

New concepts for the use and furnishing of spaces to create different structures and ambiances are met with a high level of interest and general curiosity by most respondents. The integration of separate (quiet) spaces, such as for power naps or when concentration is needed, is also rated very positively: 31.9 percent class the existence of such spaces in venues as an enthusiasm feature, 14.4 percent as a performance feature and 10.1 percent as a basic feature.

The possibility of using quiet spaces for short, private phone calls or undisturbed breaks receives high approval ratings. On the other hand, most respondents are quite indifferent to "instagrammable" interior designs compared to purely functional ones. 67.8 percent are indifferent and only a small number are enthusiastic about this suggestion. Despite the rather reserved interest in social media-friendly interior designs, the environment can have a lasting influence on social interactions and be a key element for successful events. Interior designs that are suitable for the target group can definitely boost events and increase authenticity, which this can also lead to the relevance of the "instagrammability" of interiors increasing.

Knowledge and learning at events

36.6 percent of respondents would be enthusiastic about being able to use an "inspiration buzzer" to record and transcribe inspiring moments, e.g., during a presentation or workshop, at the touch of a button, and thus store ideas in real time. Almost as many respondents (35.1 percent) would be enthusiastic about follow-ups after events in order to continue the knowledge transfer beyond the actual event and to consolidate the exchange with individual participants and speakers in a professional context. Follow-ups include further events on specific topics with a small number of participants and an interactive workshop character as well as the provision of further information after the actual event. Sustainable learning requires an active and invigorating atmosphere to foster discussion in which tension and relaxation are balanced in a motivating way. This does not exclude attempts at mediation but integrates them into cooperative forms of learning.⁷

7 See Knoll, 2016

PARTIAL RESULTS

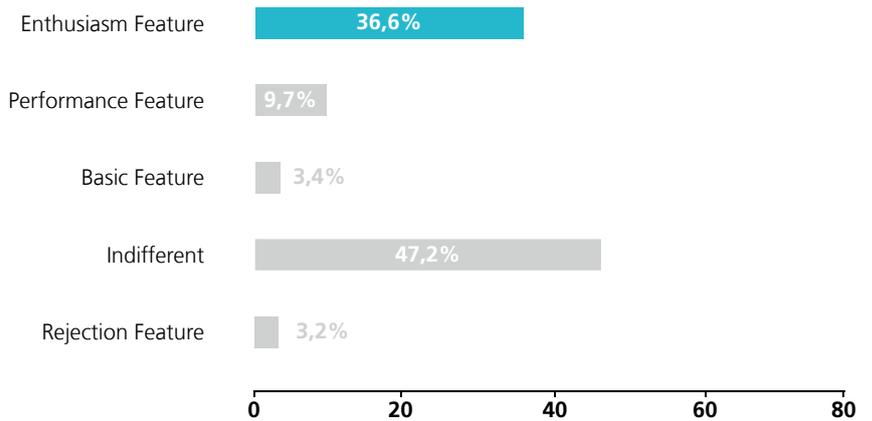


Fig. 14: Results of the Kano survey: recording/transcribing inspiring moments. n = 475

 A third (36,6 percent) would love to have that kind of documentation.

40.3 percent of the respondents rate learning nuggets in the form of a summary after events as an enthusiasm feature. Such content units can be provided in a range of different formats in order to keep participants informed after the actual event through short summaries of the most important event content or to expand the knowledge gained. Audio recordings of the event, written summaries, further interviews with speakers or podcasts are just a few examples. This result shows that participants of events like to take something with them and expect a learning effect from business events. They want to benefit from them for their personal as well as professional development.

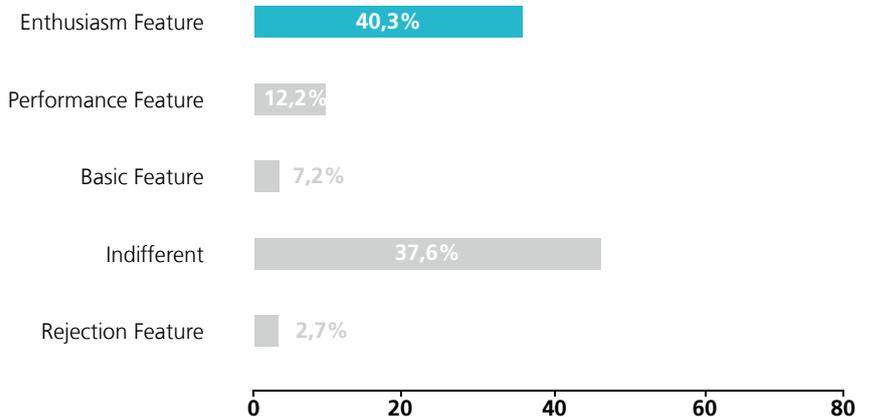
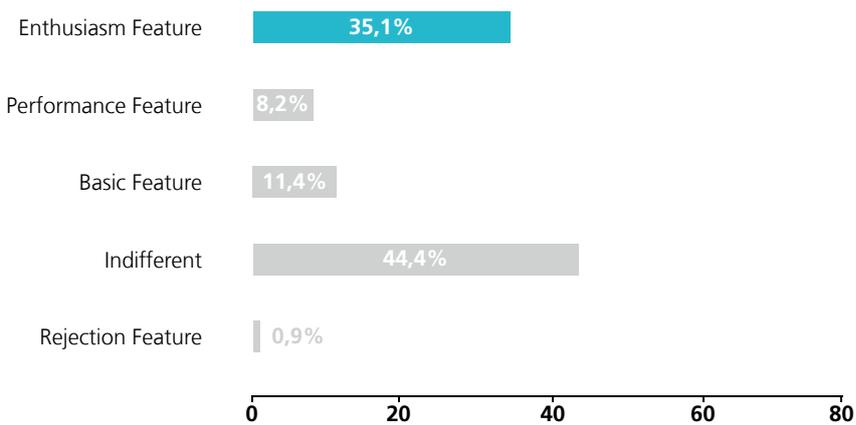


Fig. 15: Results of the Kano survey: learning nuggets. n = 474

 Learning and take home messages are important to the participants.



 A third (35,1 percent) is enthusiastic about in-depth workshops after the event.

Fig. 16: Results of the Kano survey: follow-ups.
n = 473

2.1.2 Organisers' perspective

Platforms and comparisons

Hotels are mainly booked online these days, three quarters of them via booking platforms.⁸ For event organisers, comparison platforms or digital marketplaces could therefore be a very relevant innovation. In fact, 46.2 percent of the participants in the Kano survey rated such a comparison platform, on which they can quickly and easily compare, compile and book products and services, as a performance or even enthusiasm feature.

PARTIAL RESULTS

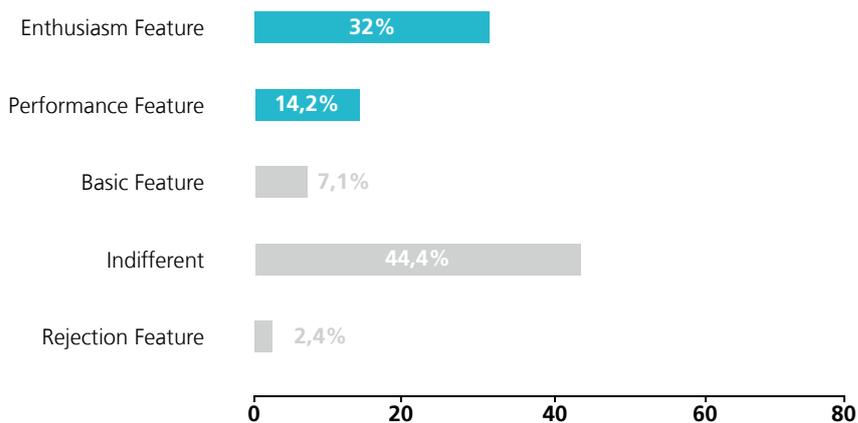


Fig. 17: Results of the Kano survey: comparison and booking platform
n = 168

 More than 45 percent would enjoy comparison platforms with booking

Another idea that was tested in the Kano survey is the possibility of being able to compare one's own event with other events by means of an anonymous comparison of success factors (KPIs). As many as 33.9 percent of event organisers would be enthusiastic about this.

This tendency once again illustrates that comparison platforms are already very much accepted both among participants of an event and organisers themselves. If such ideas are implemented, it can therefore be assumed that both stakeholders will widely use and accept them.

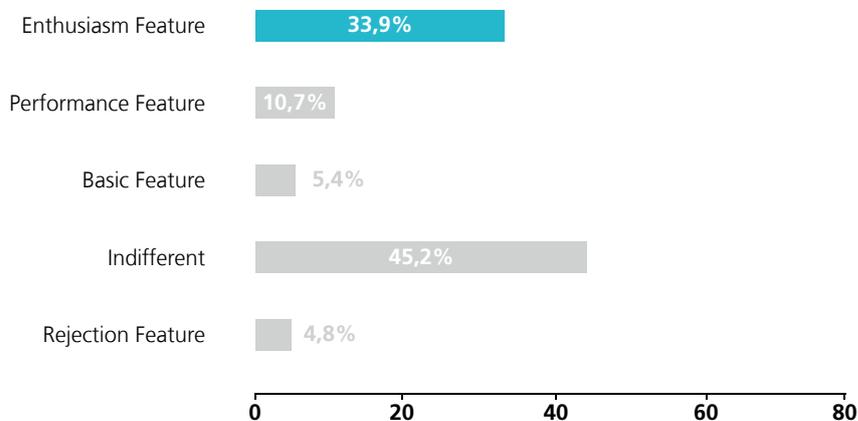


Fig. 18: Results of the Kano survey: anonymous KPI comparison from the perspective of event organisers and participants.
n = 168

 33,9 percent would love to compare their event via anonymous KPI.

The idea of a platform for selecting suitable influencers with a connection to the topic of the respective event is a quite specific one for advertising the event in a more targeted way on social media channels. 33.1 percent of the organisers surveyed would be enthusiastic about such an offer.

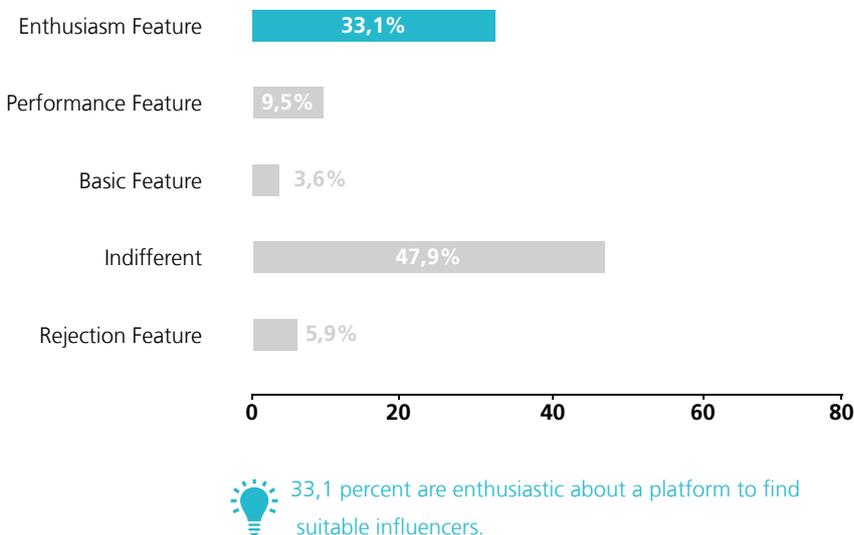


Fig. 19: Results of the Kano survey: selecting influencers via platforms.
n = 169

Digital twins

Digital twins are the digital representation of things from the real world.⁹ Originally, digital twins were used in mechanical engineering, especially in the planning of aircraft. Now, the construction industry is also increasingly working with this concept to illustrate building structures and the resulting behaviour.¹⁰

40.2 percent of respondents would also want to see digital twins in the events sector to explore event venues without the need to travel. 14 percent rate this technical innovation as a performance feature, 26 percent even as an enthusiasm feature. By illustrating production steps, the simulation model also enables a comprehensive exchange of information.¹¹ Thus, a digital twin simplifies planning processes, can increase the quality of planning and significantly reduce costs.¹²

9 See Kuhn, 2017

10 See. Huber, 2019

11 See Kuhn, 2017

12 See Huber, 2019

Success-based ticket pricing

The idea of basing the ticket price on the actual success of the event is clearly rejected by organisers (34.1 percent). Adjusting the ticket price after the event based on how it was evaluated by participants involves a high financial risk for organisers. In addition, there is the issue whether the success of an event can be objectively measured. These conflicts surrounding the implementation of this idea can also be seen in the reaction of the respondents.

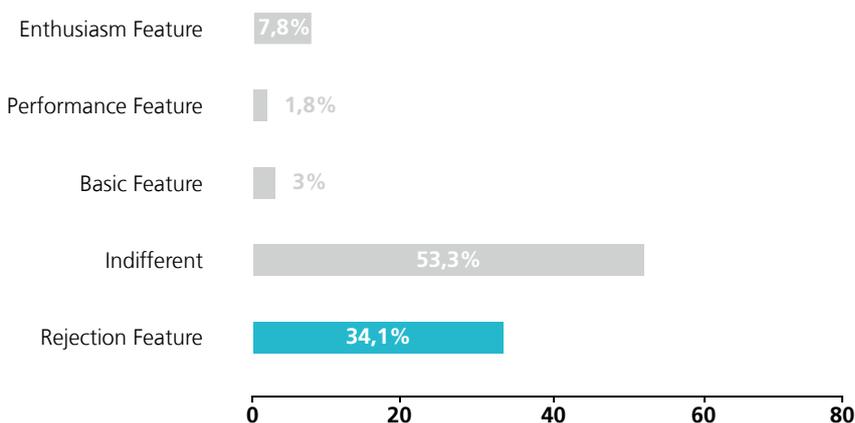


Fig. 20: Results of the Kano survey: success-based ticket pricing. n = 167

 A third (34,1 percent) rejects the idea of ticket pricing based on success.

Social seating to facilitate networking between participants

The aim of the social seating method is to place event participants next to each other who have as many things as possible in common (e.g., common interest profile) in order to facilitate better networking. This idea is evaluated both positively and negatively by the organisers. 28.6 percent rate this method as an enthusiasm feature, 17.3 percent as a rejection feature.

A similar disagreement regarding creating homogeneous groups is also found in the scientific analysis of how teams are put together. On the one hand, team members with uniform characteristics in terms of personality, values and attitudes can have a positive effect on cooperation, e.g., on satisfaction, commitment and productivity; on the other hand, creativity often suffers if the people working together are too similar to each other.¹³

13 See Scheffer et al., 2016

Organised matchmaking can lead to the creation of homogeneous clusters. Although this measure can have a positive influence on social relations and simplify networking, it restricts spontaneous and unplanned encounters that might also have been enriching for participants. Considering this, the controversial assessment of the participants in the Kano survey is therefore understandable.

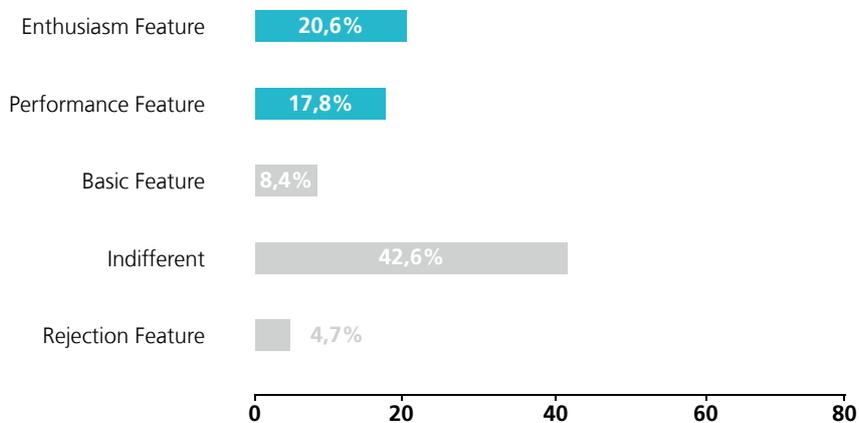
Real-time analysis of participant behaviour

43.8 percent of organisers think that real-time analyses of the participants' behaviour is a good opportunity to react to the needs of the participants during the event and to increase their wellbeing and satisfaction with lasting effect. For this purpose, aspects such as the participants' routes at the event, the number of participants in different sessions and networking are analysed.

2.1.3 Service and infrastructure providers' perspective

Platforms and comparisons

Just like organisers, 38.4 percent of service and infrastructure providers classify comparison platforms as a performance or even enthusiasm feature. They would like to offer their products and services online and have them rated afterwards.



 Up to 40 percent see a chance in comparing their services on a platform.

Fig. 21: Results of the Kano survey: comparison and rating platform.

n = 107

A platform on which venue providers can market their venue as a co-working space in order to avoid vacancies between events or to increase profits is rated as an enthusiasm feature by 25.5 percent of venue providers.

34.9 percent of the providers classify the option of an anonymous KPI comparison for services as an enthusiasm feature. Comparisons continue to be popular and accepted, be it for booking and offering services or the overall comparison with competitors.

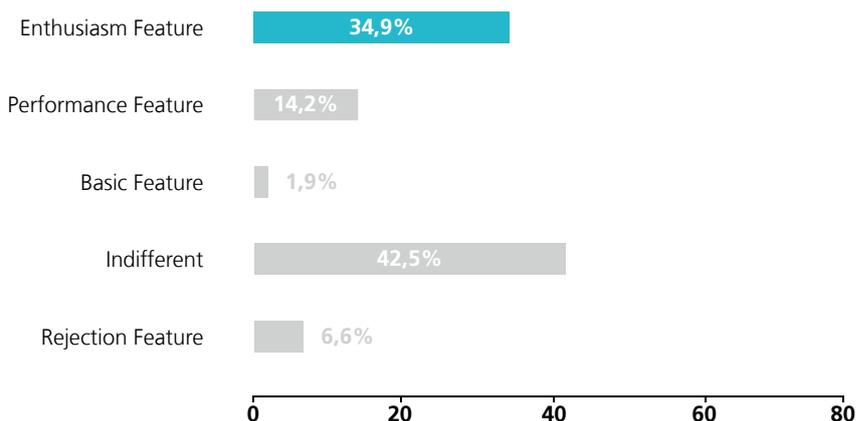


Fig. 22: Results of the Kano survey: anonymous KPI comparison from the provider perspective.
n = 106

 A third (34,9 percent) would be thrilled to profit from this.

Real-time analyses

Over 40 percent of providers would like to use real-time analytics to improve their services by tracking the behaviour of event participants. Real-time analytics are already being used, for example, to make delivery processes more efficient by simplifying the decision-making process for appropriate reactions to certain incidents.¹⁴

Service providers as well as organisers see a similarly high potential in real-time analytics for events. According to the respondents, such functionalities can provide valuable contributions in the future to maximise participant satisfaction and to simplify the successful running of events.

14 See Wurst, 2020

Virtual spaces

Virtual spaces can complement the physical event space and serve as a platform for presenting products, for example. The idea of moving around in these rooms with avatars and networking with other participants and suppliers, as well as experiencing the products virtually, triggers differing opinions. 19.8 percent classify this idea as an enthusiasm feature, while 12.3 percent reject it.

According to a study by the "EXPO EVENT Swiss LiveCom Association", the use of augmented reality solutions has increased significantly in recent years. However, compared to other technologies, augmented reality is not yet used quite as frequently.¹⁵ VR experiences can create surprising moments which can go viral, with event participants becoming product ambassadors. In addition, products that cannot be transported due to their size or substance can be presented in virtual spaces. On the other hand, there has been little acceptance of the use of virtual spaces so far¹⁶

The general disagreement about the actual added value of using 3D worlds is also reflected in the results of the Kano survey and could also be due to the still somewhat abstract use scenarios and the diverse technological approaches.

15 See Künzler et al., 2018

16 See. De Smet, 2017

Summary

- Comparison and booking platforms for events, with the possibility to book events at short notice, show a high acceptance and enthusiasm potential among all respondents.
- Venue providers also see great potential in the possibility of offering their facilities as co-working spaces between events in order better use their infrastructure.
- Event organisers and planners would like to use online platforms to more easily identify suitable influencers for social media advertising purposes.
- The vast majority of respondents expect events to provide an all-round experience. This includes highlighting what the region where events take place bring to the table, e.g., by means of an informative app and regional side events. The possibility of participating in the development of events also meets with a positive response.
- Individual event suggestions based on one's own profile in professional and private social networks polarise the respondents. There is more agreement on actively supporting networking on site.
- The survey participants are positive about innovations in virtual reality and livestreaming.
- From the perspective of planners and service providers, real-time analyses of participant behaviour, e.g. walking routes, would be a useful tool for increasing participant satisfaction during events.
- When it comes to the design of spaces, the survey participants attach great importance to being provided with quiet spaces for phone calls or power naps, as well as variable and varied seating.
- Digital twins of event venues make it easy to inspect them and plan how to use the premises and structure spaces, without having to travel.
- Despite the importance of networking, enabling participants to gain know-how should by no means be neglected. In this context, relevant buzzwords and future ideas revolve around what we have described above as inspiration buzzers and follow-ups with personalised learning nuggets.

2.2 Focus groups

2.2.1 Virtual focus groups

Status quo and objectives

In March and April 2020, three focus groups were set-up with event experts and a young talents group. Due to the pandemic, these meetings took place virtually.

The aim of the focus groups within the research project was to enable an in-depth discussion in smaller groups through explorative exchange in order to look at individual aspects and trends of future developments in events.

Description of focus groups

The young talents focus group consisted of 16 students from two universities, Technische Hochschule Mittelhessen and Hochschule Stralsund, as well as apprentices from various companies in the meetings and event industry. In order to collect data and develop ideas, two additional expert focus groups were set up, comprising five people each. They included staff from two universities, Technische Universität Chemnitz und Technische Universität München, as well as private sector representatives.

After the Kano survey was completed, two further virtual focus groups with event industry experts took place in September 2020, with a focus on the development of scenarios based on the trends and innovations that had been identified for future events. These workshops also took place in small groups of four and six experts respectively.

The interactive and creative focus group workshops were each hosted by two moderators who guided the discussion by means of open and closed questions. When presenting their results, the participants had the opportunity to visualise their contributions using various online tools, for example diagrams, word clouds or mind maps. They were also able react to the input of other participants.

Questions and topics

The focus groups in March and April 2020 were divided into ten units, each one focusing on one topic. These topics were discussed with varying intensity depending on the type of participants and what the respective group was most interested in.



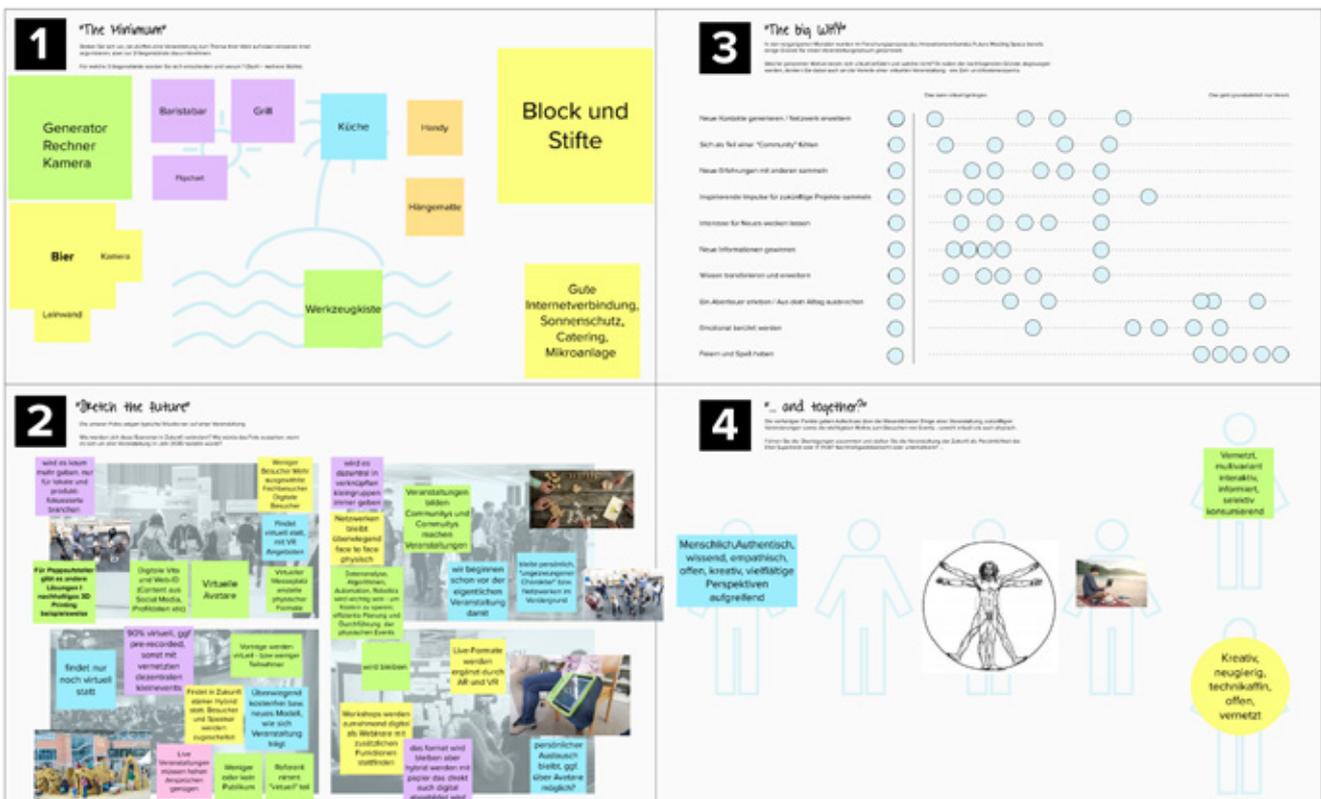
Fig. 23: Focus group topics. The following focus questions were discussed:

- Will events take place virtually or physically in the future?
- What are the biggest opportunities and challenges for events, respectively digital events?
- Which skills and competences will be needed in the future?
- Why will people attend events in the future?
- How is enthusiasm created? And (how) can this enthusiasm also be transferred to business events?
- How can virtual events be made more interactive and networking be supported?

The other two focus groups in September 2020 focused on linking the collected insights into future scenarios. To develop the scenarios in a co-creative process unconventional questions were asked, the overriding purpose of which was to trigger a lively and open discussion:

- "The minimum": What items would you take with you for an event of your choice on a desert island?
- "Sketch the future": How will event scenarios change in the future?
- "The big WHY": Can the benefits of attending an event also be replicated in virtual formats?
- ".. and future personality?": How would future events be if they were a person?

Using an interactive online tool, the results were visualised and collated.



Results of the focus groups

We will now present the results of the altogether five focus groups by topics and highlight the differences between the meeting experts and young talents of the first three focus groups. The future scenarios developed in focus groups four and five will not explicitly be discussed. The results are part of t of the final scenarios and recommendations for action (see chapter 4).

Fig. 24: Focus groups: Sketch the Future.

The role of events

The Covid-19 pandemic has changed the events sector worldwide and we can assume that this will also have a lasting impact on the future role of events. Before the pandemic, both private and professional events in physical spaces were taken for granted. However, the focus groups agree that in the future people will only physically attend an event if there is a recognisable added value compared to attending virtually.

Especially the event character of events and the personal interaction can hardly be replicated in virtual spaces so far and require a physical gathering. It is therefore assumed that the focus of future physical or hybrid events will be primarily on promoting informal exchange and interaction between participants.

The young event industry talents agree that society will rethink the role of events, be it a return to basics, a review of previous goals and methods or a complete reboot. As has already become evident in many places, the crisis also offers an opportunity to drive the digital transformation and for thinking about how to deal with future crises.

Based on the work with the young talents in the focus groups, we can assume the development of a new awareness for events in the future. Face-to-face contact at physical events will gain in importance, but at the same time a strong increase in virtual elements at events can be assumed.

70 percent of the experts who participated in the focus group believe that the majority of events will tend to take place physically in the future. However, they also assume that the share of virtual elements and digital tools used at events will increase. The experts see a clear growth in hybrid events. However, many aspects, such as networking and informal interaction/ socialising, are difficult to implement virtually. Therefore, there is an expectation that physical events in the future will place even more emphasis on personal contact and the creation or staging of experiences in order to generate added value compared to virtual events.



Designing virtual events

According to the focus groups with industry experts and young professionals, the importance of virtual events will increase significantly in the future. The implementation of virtual events requires suitable technologies and tools on the one hand and innovative formats on the other. They need to promote networking and know-how exchange among participants and create a joined up experience despite the physical distance.

Virtual reality applications are the best-known technology and the one people have the highest expectations for. A virtual presence not only makes it possible to recreate the experiential character of an event as closely as possible, but also to achieve greater reach. In addition, the use of VR supports sustainability, as participants do not have to travel to events. Streaming an event also helps to reach a larger number of people. In addition, experts and young professionals see great potential in adapting tools that have so far been used in games. They agree that initial ideas for how to implement a virtual, interactive event world, which fosters the active participation of virtual attendees, could be found in game design.

In addition, certain general conditions can make it easier for participants to network at virtual events. The experts agree that the size of the group is crucial for a successful implementation in virtual spaces. In small groups of less than six people, the transition from private to professional communication is most successful. The duration of workshops should be limited and offer the opportunity to get to know each other better during longer check-ins and check-outs.

Fig. 25: Focus groups: summary of inspiring events.

Knowledge around community building plays a crucial role in overcoming (spatial) distance and creating a sense of community. A bonding element, for example a common task or joint virtual activities such as cooking, also offers the possibility to bridge the issue of distance by creating key moments. Experiments with real games in virtual spaces can also promote community building.

According to the experts, there are hardly any event formats that are not suitable for virtual implementation. However, they must be adapted and modified in appropriate ways in order to meet the requirements of this specific environment.

Emotional experiences

The discussions in the focus groups show that both experts and young talents focus on emotional experiences when attending events. In addition to know-how exchange and learning, event participants are primarily interested in networking with others, discovering new things, having fun and sharing experiences with friends from their professional or private world. Gathering new impressions and being inspired is clearly key for event participants.



Fig. 26: Focus groups: Reasons for attending events.

Excitement and emotion play a major role especially at non-business events, such as festivals and concerts. In contrast to that, young people in particular perceive a certain emotional distance at business events, which goes hand in hand with the fact that they see themselves as attending in a particular role and is responsible for the fact that they express themselves less freely. The expert group thinks that transferring the excitement and emotion aspects of non-business events to the world of business events might be a big opportunity for a long-term, successful concept.

According to the experts, considering diverse formats, locations (both locally and globally) and target groups are also important factors in planning an emotional and inspiring event. The event venue plays a key role for emotional enthusiasm at events. If events are spread out across different rooms as well as open areas, they become more dynamic and conversations arise more easily. Smaller event formats come across as being more personal and individual and support making more in-depth contacts. Confident speakers who can transfer their own enthusiasm to the participants are perceived as extremely helpful. In addition, their personal storytelling conveys authenticity and empathy and makes it easier for the audience to relate to the respective topic.

The results of the focus groups allow for the conclusion that events are primarily about one thing: emotions. Events become more emotional and convey a sense of community that inspires the participants in the long term if organisers can make the participants feel as enthusiastic about their event as they do and if various entertaining opportunities for interacting with others as well as personal and authentic stories are incorporated.

Community building

According to the findings coming out of the focus group discussions, creating a close-knit community within the ecosystem of events will become much more important in the future. An event will no longer only include the actual event but must also facilitate a year-round connection between all participants. This means that the run-up to events as well as the follow-up will become increasingly important. Excitement and anticipation can be created, for example, by providing different types of content on social media channels or goodie bags with related products.

Furthermore, in particular the group of experts assumes that participants will increasingly want to actively participate in the planning and development of an event. Using social media not only makes such participatory processes easier but also promotes a sense of community and fosters interaction before events actually take place. According to these experts, events will increasingly develop into a closed cycle with a year-round accompanying programme.

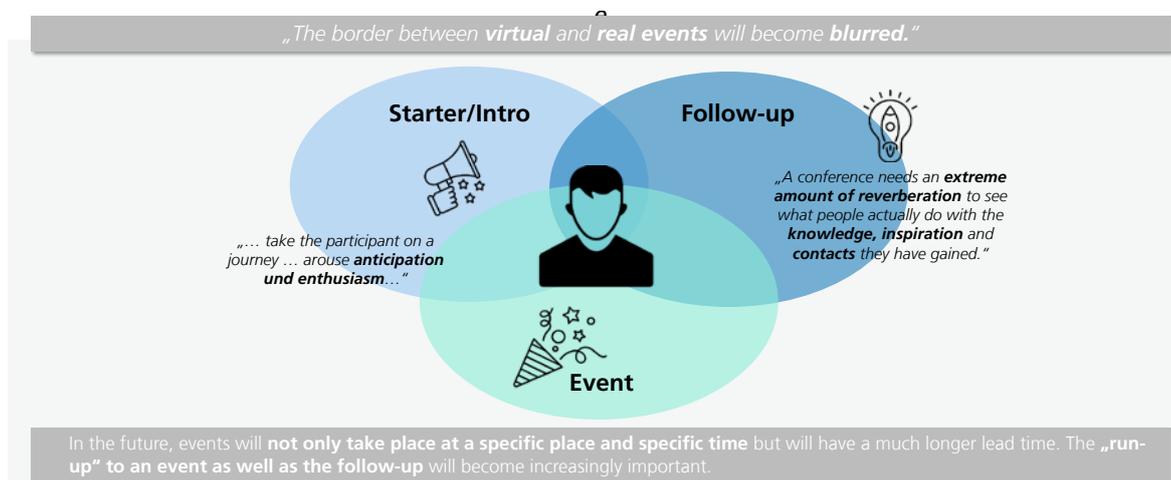


Fig. 27: Focus group: **Measuring success**
hybrid events.

The first question that needs discussing here is how to generally define a successful event. In our previous Future Meeting Space (FMS) research phase, we identified six factors that are decisive for successful events: digitalisation, knowledge transfer, interaction, networking, disruption and satisfaction. The experts pointed out that a successful event is defined by many different factors, which can also be found in the success factors as defined by our FMS innovation network. People and human needs provide orientation and set the standard for the success of an event.

Measuring success is based on KPIs well as on soft, qualitative factors. For the organisers, the focus is often on achieving business goals, which are primarily reflected in the turnover or the number of participants. Beyond that, the use of soft factors for measuring success will increase in importance in the future. This requires, among other things, the development of strategies and solutions to measure the quality of contacts, transfer effects and the recommendation rate as well as the wellbeing of the participants (e.g., by measuring body temperature and pulse).

Skills profiles

The focus groups agree that event professionals will have to be able to master a range of social and professional skills in order to ensure the quality and thus the relevance of events in the future.

According to the expert group, knowledge and skills in dealing with data and digital tools will gain in importance for event organisers and planners. On the other hand, moderation skills will become increasingly important. Since simply replicating analogue formats in the virtual space offers no added value, they must develop and acquire new knowledge and learn how to organise successful digital events. Planners must become generalists who either know what their colleagues are doing or who can be asked for help.

One of the memorable statements coming out of the focus groups is that event managers are generalists in the sense that they know what is important, but experts are needed who can provide specific input on various topics. In order to meet this demand, the focus group participants think that event managers need to have their own network of people that they trust in.

In addition, digitalisation requires planners and event organisers to be more open to new formats and experiences. They also need to be more flexible and creative, since the short-term nature of events will increase and the planning process will become more and more fluid.

As new content can continuously be shared on social media, organisers are required to focus more on current topics when planning programmes for virtual events in the future.

Summary and conclusion

- The focus groups clearly expect events to become increasingly hybrid in the future. In order to offer added value compared to virtual events, organisers will have to adapt existing physical formats and programmes and enhance the on-site experience of participants.
- The run-up and follow-up to events as well as the community idea will become increasingly important. The participant must be taken on a journey and have the opportunity to be part of the event community even after the event.
- A relaxed and above all authentic atmosphere featuring personal elements (e.g., storytelling) as well as experiencing a community spirit support the emotional experience at leisure events and must be transferred to business events.
- People primarily attend events to make contacts and exchange ideas, but also to get new inspiration and knowledge as well as specify existing know-how.
- In order to ensure the quality of events in the future, event professionals need to master a range of social as well as new professional skills.
- In the context of measuring success, soft factors (e.g., the quality of contacts, transfer effects, wellbeing) will gain in importance in the future and appropriate solutions must be found for this.

2.3 Development of assumptions and Delphi study

From the beginning of November to the beginning of December 2020, we carried out a Delphi survey to examine how probable it is that certain assumptions about the future that were developed on the basis of the previous analyses will become reality. These assumptions revolve around possible occurrences, trends and technical developments in the event industry.

In the course of our third research phase, a total of 27 event industry experts as well as experts from related fields were asked for their assessment of the probability of 30 assumptions becoming true. Before actually assessing these assumptions, the level of expertise of the respondents in the different subject areas in question was determined and classified according to a seven-level scale.

2.3.1 Evaluation of the Delphi study assumptions

Assumption: Hybrid events will predominantly shape the look of events and do so with long-term effect. This will make it much easier for participants to attend events while speakers will considerably increase their reach.

Statement becoming true

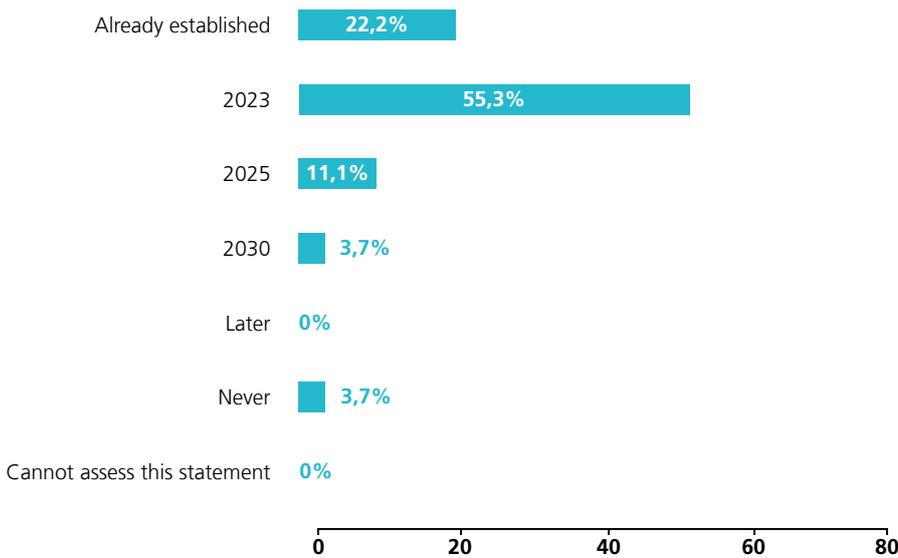


Fig. 28: Results of the Delphi survey: hybrid events.
n = 27

The vast majority of experts are of the opinion that hybrid events already shape the world of events today or will do so in the very near future. This assessment confirms the already expected high relevance of hybrid events even after the Covid-19 pandemic. Higher reach is seen as an opportunity for speakers, but also as a challenge.

With an increase in hybrid events, experts believe that the design of the interface between physical and virtual events will be an integral part of every event organisation in the near future. 70 percent estimate that this will happen by 2025 at the latest.

The increasing number of hybrid events does not only have an impact on the general conditions under which events are organised, but also on the required skills profiles of the people involved in the planning and implementation of events. The majority of those surveyed assume that by 2023, organisers, planners and event moderators will need additional skills for developing and designing hybrid events. 37 percent already see this need today.

Furthermore, it is expected that the increase in virtual and hybrid events will also increase competition within the market, which in turn will lead to a concentration on fewer events. However, the experts' opinion on this assumption shows a high degree of divergence. Approximately 33 percent assume that events will never compete for participants and top experts and that therefore, there will be no concentration on a few events. About 37 percent, on the other hand, say that this assumption will already have become a reality by 2025. The wide range of different events with diverse concepts should therefore not be lost, but the experts are well aware that competition will be extremely high due to the increase in virtual events, also considering that such events will, in addition, be organised by influencers and social media platforms.

Assumption: *Many events will take place as simultaneous multi-site conferences in different locations, e.g., to improve networking and the community experience.*

Statement becoming true

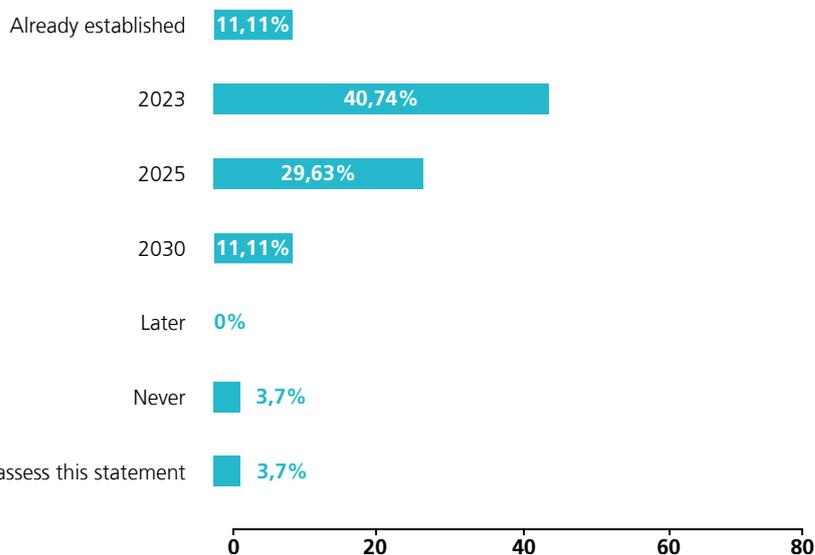


Fig. 29: Results of the Delphi survey: multi-site conferences.

n = 27

The importance of multi-site conferences is rated very highly by the experts. The vast majority (approx. 41 percent) anticipates that as early as 2023, there will be many events which will consist of smaller connected hotspots in different locations instead of one single, large event in one place. Another 30 percent expect that such events will be a reality by 2025. These assessments can, among other things, be attributed to the experiences gained in dealing with virtual tools and communication platforms during the Covid-19 pandemic, which makes it easier to envision events that are distributed across different sites but nevertheless allow for

networking and interaction. In addition, geographically distributed conferences can in the future address a broader audience in different cities, and this potential of a global audience at international event sites is also acknowledged by a majority of the experts.

The experts are very divided about the assumption that "glocal events" (portmanteau of global and local, meaning to act globally while always emphasising locally existing strengths in order to boost any given region) no longer only increase in major cities, but also in rural areas. 15 percent are of the opinion that glocal events are already established. Another 15 percent do not expect this development to happen. 15 percent are unable to assess this situation. Another 15 percent see this happening by 2025, with the same percentage opting for 2030. However, the highest share believes that 2023 is the year for this assumption becoming a reality.

However, the experts think that the following assumption will quite soon become real: In the future, events will no longer take place exclusively in the typical, large venues as we know them but mainly as multi-site events with a limited number of participants in authentic and unique venues, which can be used flexibly (e.g. temporary pop-up spaces). 30 percent expect this by 2023, another 30 percent by 2025 and around a quarter of the respondents say that this scenario is already a reality. Overall, about 85 percent are of the opinion that events will soon no longer take place only in conventional, large venues. Only 7.4 percent see this development coming to pass as late as 2030. This means that event halls will have to completely reinvent themselves with regard to how events are designed and implemented as well as in relation to the follow-up with customers in order to be able to keep up with the emerging competition of smaller venues that are perceived as more authentic.

Against this background, the short-term booking of pop-up venues (e.g., in empty offices or shops) in regions or at events with a particularly high demand for participation in the context of multi-site events is also perceived as a realistic scenario in the near future by the experts. 37 percent expect this to happen by 2023, another 30 percent by 2025.

The experts agree that when thinking about how to create event spaces, the focus is primarily on an "instagrammable" set-up that supports the respective topic of the event. 37 percent think this is already happening, another 41 percent believe that it will happen by 2023 at the latest and 19 percent believe this to be the case by 2025. In comparison with the results of the Kano survey, a discrepancy between experts and users becomes clear in this context as the vast majority of the survey participants were not enthusiastic about the idea of "instagrammable" designs.

As a result of the previous considerations on the size of events and new geographical distribution, a further assumption was being proposed regarding a long-term change when it comes to gatherings of large crowds. One third of the experts believe that already in the next three years there will be a visible trend towards smaller, alternative formats. 22 percent say that this is already a reality. 11 percent assume that it will happen by 2025 which contrasts with 15 percent who do not think that this will happen in event events sector. Nevertheless, the experts agree that smaller formats with a sharper focus on certain topics and target groups will prevail in the future.

Despite the expected increase in virtual and multi-site events in different geographic locations, it is assumed that participants will still attend events physically, mainly motivated by a demand for social interaction and the wish to grow one’s network. The interest in informal and "spontaneous" encounters, which are, however, deliberately staged in the background by organisers, is accordingly very high and influences the format of events. More than half of the experts think that this assumption is already a reality, and another third expect it to become one within the next three years.

Assumption: *Based on the above, the requirements for on-site events are also changing fundamentally. The purely informational content provided in events will decrease, while the experiential aspect will become increasingly important.*

Statement becoming true

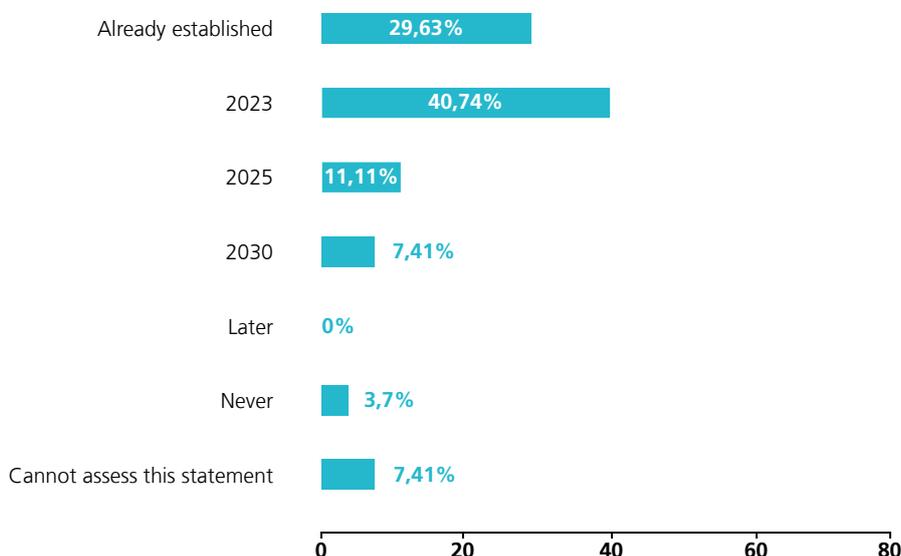


Fig. 30: Results of the Delphi survey: requirements for on-site events. n = 27

The experts surveyed think that the experiential character of events is already extremely high today. Another part (approx. 41 percent) expect the assumption to be true by 2023 at the latest. This assessment supports the insight already gained in the focus groups that physical events in particular should in the future focus more on the staging of emotional experiences and fostering interaction with and between participants.

However, it is also to be expected that opportunities for interaction will increase at virtual events, e.g., through the use of various digital tools such as 3D worlds with digital avatars. Although the establishment of digital worlds is rated controversially by the experts, almost one third expect that corresponding tools will be used in the context of virtual events within the next five years. Another 15 percent, however, assume that this scenario will never happen. The experts in the Delphi survey, on the other hand, consider the use of augmented reality at physical events to be more realistic. 44 percent expect corresponding tools to be widely established by 2025. 22 percent assume that it takes significantly longer to achieve user acceptance and do not expect regular use before 2030.

Furthermore, it is assumed that just as important as the event itself is the creation of a community around a certain topic or value system and that an event will no longer be limited to a one-off occasion, but that the phases of preparation, execution and follow-up will become increasingly blurred. The experts confirm the increasing importance of communities around events. For one third, this trend is widely established, and about 52 percent expect that this aspect, which also extends events from a time perspective (one date vs. all-year round) to be a reality by 2025.

Providing attendees with the opportunity to participate in the selection of speakers and the programme development to create a strong connection with the event early on, which can also be a building block for creating a community, is of great importance for many experts. Currently, 14 percent think that such participatory planning processes are already happening. Approximately 30 percent assume that this tool will by 2025 be regularly used in the planning of events and approximately 19 percent assume that this will be the case by 2030. The results also illustrate that interactive communities around the actual event will be in high demand in the future. It can be assumed that the continuously high use of social networks will drive this trend.

The increasing importance of social networks is also evident from the reactions to the following assumption: 63 percent of the experts assume that by 2023 at the latest, participants will already connect with each other before the actual event on the basis of their social media activities and profiles and will thus engage with each other, including discussing their interests, prior to the event (e.g., on the train travelling to the event). One third of the experts say that the use of data to support networking activities among participants is already a reality.

With regard to the use of facial recognition for checking in event participants, the experts largely expect this to happen in the near future. Some 15 percent say that this is already a reality. 26 percent and 22 percent expect its widespread use by 2023 and 2025 respectively. Only 11 percent assume that this scenario will never happen. In this respect, the opinion of the experts on the one hand and event participants on the other, who clearly rejected the use of this technology in the Kano survey, differ greatly. In addition to the use of facial recognition software, the experts also think that chatbots for guest services have a high potential. This assumption outlines a future with chatbots to promote an easy and open feedback culture as well as information transfer so that the event professionals looking after the participants on-site have enough time to support their socialising. Almost 26 percent expect this scenario to be a reality by 2023, 19 percent by 2025 and 26 percent by 2030. Despite everyone agreeing that this assumption will come true, this result cannot be used to make a precise statement about the timing.

Assumption: Tracking systems that measure the wellbeing of participants on the basis of wearable tech, such as smart watches, will be standard at many events. By passing on the data to building management systems, elements including room temperature and lighting can then be adjusted as needed.

Statement becoming true

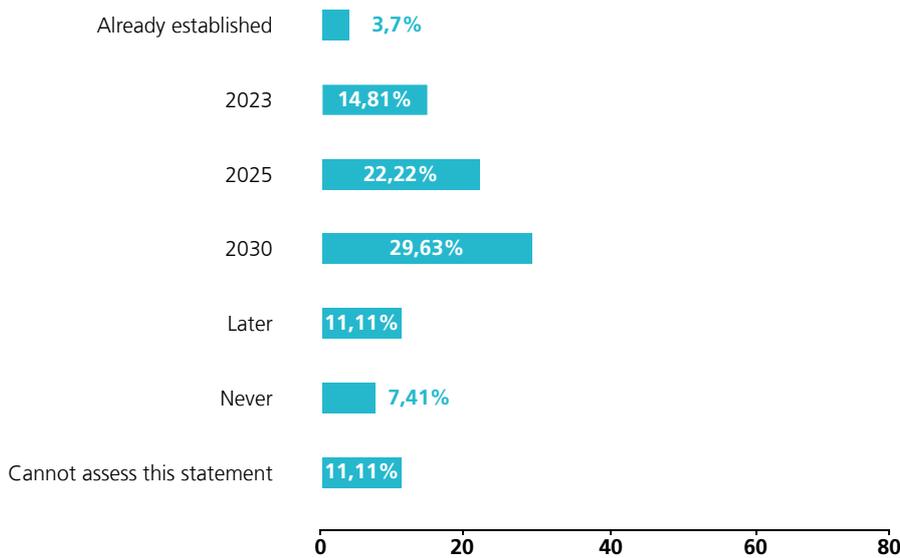


Fig. 31: Results of the Delphi survey: systems to track the wellbeing of participants. n = 27

The experts questioned in the Delphi survey agree that the widespread use of tracking systems to measure the wellbeing of participants will happen in the future. However, there are differing opinions with respect to the timing. The experts tend to assume that wearable tech, such as smart watches, will not be used until 2025 at the earliest, while about 30 percent assume that the tool will be used in 2030.

In addition to assessing assumptions about the future use of technical tools at events, the experts were also asked to evaluate the use of digital comparison platforms. Comparison platforms could enable a quick overview of almost all virtual and hybrid events worldwide and provide potential participants with personalised suggestions based on their preferences, location and professional interests. Due to the new complexity of the events market brought about by a multitude of virtual and hybrid formats, experts think that a centralised platform has high potential. Only about 7 percent say that this scenario will never happen. The relative majority (approx. 26 percent) assume that such a platform with a centralised overview of offerings will already be a reality in 2023.

In addition to simplified booking processes enabled by a central event platform, the next assumption voices that participants will create their personalised virtual event from a variety of virtual and hybrid events, i.e., they will book individual elements from different events at their convenience, including pay-per-use.

Apart from the fact that it can be assumed that the increased ease of virtual and distributed access to events will lead to a wider range of offers, it can also be assumed that virtual participants will become a substantial source of income for organisers, both in terms of additional participation fees and new sponsoring models. The experts have a clear opinion about this statement. Almost three quarters expect it to come true within the next three to five years. In the future, the necessity of developing new business models will thus increase strongly due to the changed conditions. The experts consider this dissolution of event boundaries to be a realistic future scenario. 30 percent assume that the booking concept described above will be a reality as early as 2023, 19 percent assume this to be the case in 2025 and 22 percent expect this to happen by 2030.

Assumption: *Increasingly, the ticket price of events will be linked to their success and will only be established after the event has ended.*

Statement becoming true

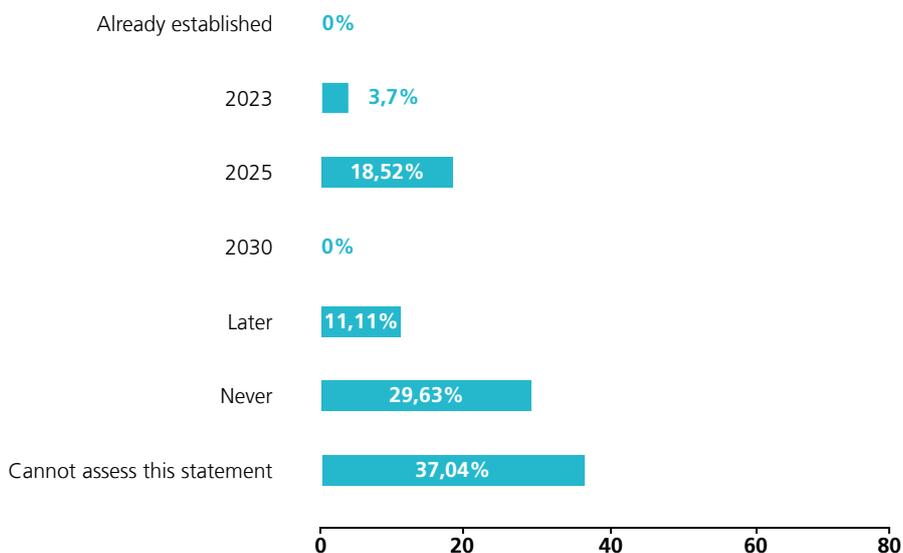


Fig. 32: Results of the Delphi survey: ticket price based on success.
n = 27

This assumption questions that ticket prices are fixed from the start. A large proportion of the experts thinks that such as model is not realistic, with approximately 30 percent saying that it will never be a reality, and 37 percent not being able to assess this assumption. Only 23 percent can envision such as success-based ticket price to become a reality by 2025. The financial risk and difficulties inherent when it comes to budgeting events override the potential that this strategy might generate higher profits. From the experts' point of view, this confirms what already became apparent in the Kano survey.

A similar picture emerges in the assessment of speakers' fees based on the number of participants they reach virtually. Here, too, about 30 percent of the experts state that they do not expect such a model to become a reality on a broad scale. 22 percent cannot assess the assumption and only 22 percent can imagine it becoming a reality by 2025.

In order to find out whether virtual participants perceived events to be inspiring and interesting, measuring the attention of participants in virtual and hybrid event formats will become a particularly important success factor in the future. Regarding this statement, the experts have a fairly clear opinion, with 51 percent saying that it will be true by 2023 and another 15 percent expecting this to be the case within the next five years. According to the experts, measuring the attention span will prevail in the future to enable the measuring of success, the improvement of formats and the increase of the experiential value of events to thus increase the attention of the participants and, ultimately, their long-term satisfaction.

The follow-up after events will become increasingly important in order to increase participants' commitment in the long term and to establish a community around an event or series of events. Accordingly, it is expected that in the future, participants will receive individually tailored "learning nuggets" after events, including simulation or animation videos, short summaries, tasks or pop quizzes to check what they have learned. The increasing importance of the follow-up process and the integration of learning nuggets as an established element is confirmed by the majority of the experts. 33 percent think that this is already a reality, 37 percent expect it by 2023 and 15 percent by 2025. In addition, it can be assumed that in the future, smaller follow-up events (follow-up meetings) will be offered on certain topics or in a specific region. This view is also supported by the majority of the experts. 26 percent are of the opinion that follow-up events are already a reality in the event industry, 37 percent expect them to become one within the next three years and another 22 percent within the next five years. The assumption that what is happening after events will become an established component for building a community can therefore be confirmed.

Sustainability as a megatrend was also included in the Delphi survey and discussed from a professional perspective with regard to when it is likely to become a reality.

Assumption: *The value of sustainability determines behaviour in society, and events must also meet these requirements. The type of mobility and all the elements of an event (e.g., catering, building technology, travel) will be adapted to this.*

Statement becoming true

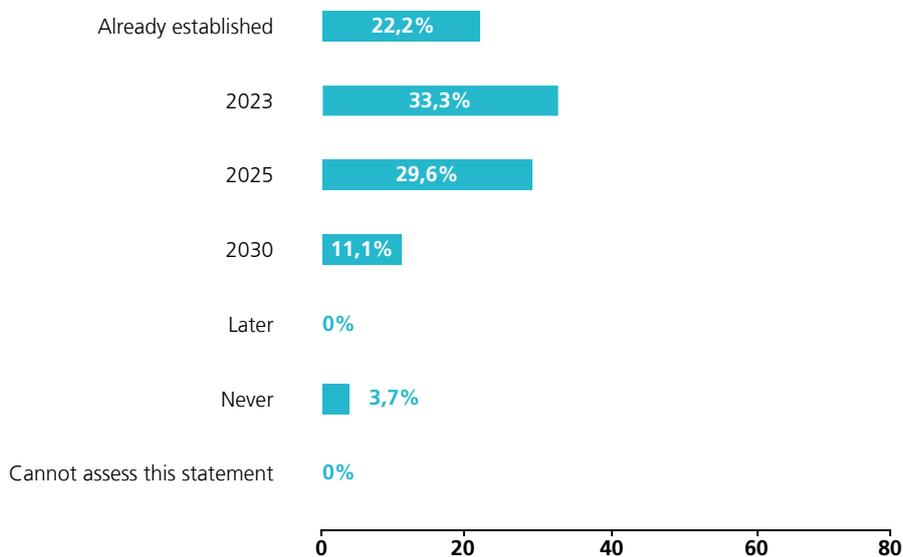


Fig. 33: Results of the Delphi survey: sustainability in the context of events.
n = 27

The way experts assess this topic shows its urgency: Altogether 85 percent consider the value of sustainability at events to already be very high at the moment or think that it will be so within the next five years due to changes in behaviour. Only about 4 percent do not expect that society as a whole becoming more environmentally conscious will have a long-term effect on events.



3 SUMMARY OF RESULTS

3.1 Characteristics of future events

The third research phase of the "Future Meeting Space" innovation network aims at answering the following three key questions and to develop recommendations for action for how to design future events:

- What role will events play in the communications mix of organisations in the future?
- Based on the above, how will job and skills profiles change?
- How can factors and requirements for success make it possible to measure events?

To answer the research questions, it is first necessary to clearly define what is meant by "event of the future" and to describe its characteristics, especially against the background of the changes in the events markets as triggered and/or accelerated by the pandemic.

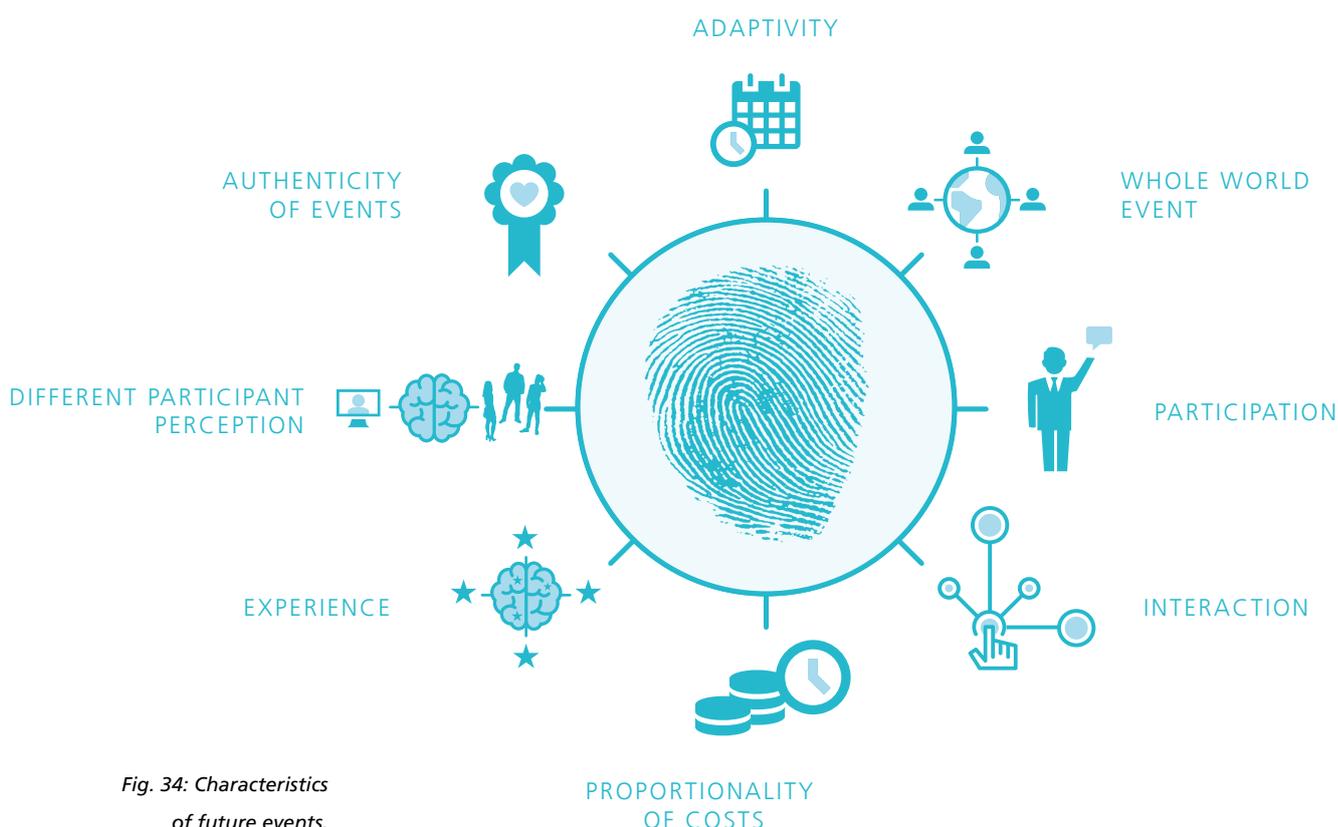


Fig. 34: Characteristics of future events.

Up to now, most events haven taken place in a face-to-face set-up, with only a few virtual elements. The pandemic has now put the focus on virtual and partly already hybrid events. Even though there is a certain longing for physical contact and interaction with other people as we had it before the pandemic, a huge increase in hybrid events is expected. These connect virtual and on-site participants, speakers and hosts. Hybrid set-ups allow for a lot of diversity when it comes to designing events. There are numerous opportunities for implementing them and they have considerable potential for further development.

In addition, we can expect for events to last longer. In the future, they will circulate in an event loop in order to build a community on an ongoing basis and to create a brand

Events of the future will very much be shaped by the demand for topics that reflect what is currently going on in the world. What events are about will be of increasing importance. Events must take place when a topic is relevant and react flexibly to current events.

As far as general conditions of events are concerned, the time aspect and in what kind of venue they take place will change fundamentally. But not only that: The increasing digitalisation of all areas of our lives as well as globalisation and the increased acceptance of virtual and hybrid event formats based on experiences made with them will lead to events having a bigger geographical reach. Hybrid set-ups will enable building a community for and around an event both nationally and internationally.

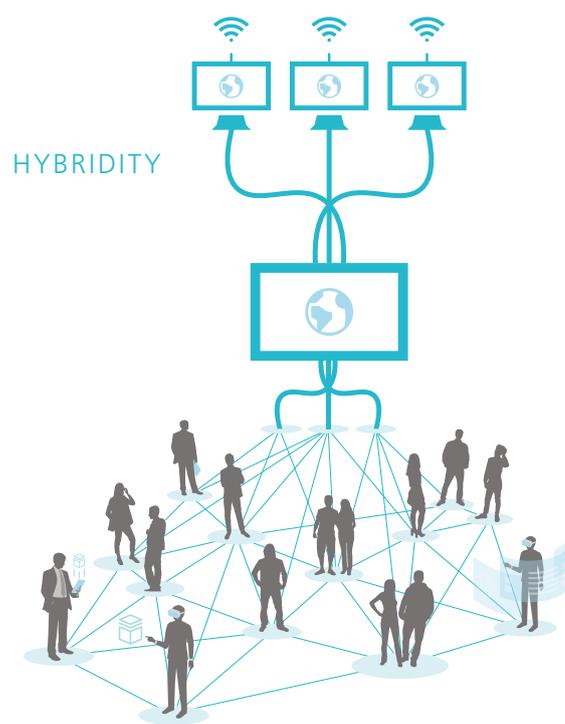


Fig. 35: Hybrid set-ups as a decisive factor in the future events market.

Participation will play an increasingly important role in the future. A clear distinction must be made between participating on-site/at the event, in the sense of interaction, and participating in the development of the programme in the run-up to events.

The proportionality of costs and thus cost efficiency will remain an increasingly important factor for success and participation. Events of the future will have to be an experience for the participants, which stay in their mind because of the emotions triggered there. This is taking on ever more significance in order for customers and participants to commit to events and organisations and brands associated with them in the long term, especially when considering that events are not one-off occurrences anymore which only take place at a specific time.

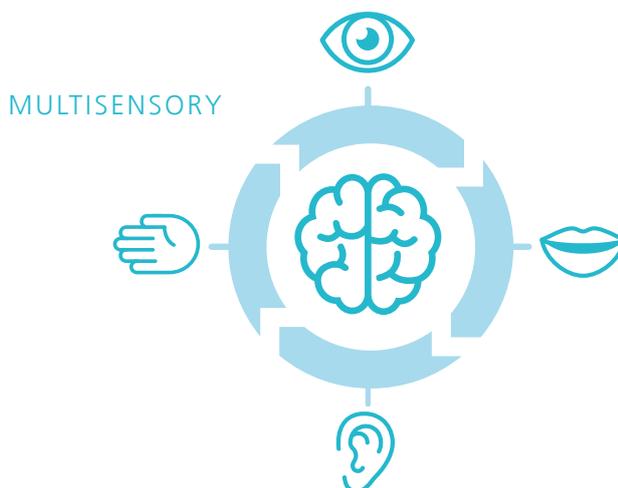


Fig. 36: Multi-sensory, authentic, experiential.

To achieve that, authenticity is needed, which an event must convey in order to enable positive identification with brands. As the future will be hybrid in many different ways, different groups of participants must be addressed accordingly. It is important not to forget that the audience is present both physically and virtually. This results in participants perceiving and experiencing events differently, which must be considered.

3.2 The future role of events in the communications mix of organisations

Events are not an isolated element on its own, but an essential part of the communications mix of organisations. What is the specific role that events play in this communications mix?

The classic digital media channels are increasingly losing importance. ¹⁷It is no longer them but social media platforms that are mainly used to communicate, depending on the target group. With digital and virtual forms of communication, our society, quite literally, loses touch, which, on the other hand, means that people increasingly long for real and genuine experiences. Touching things is becoming more important.

Spontaneous, physical encounters which can create surprising moments, a range of networking activities and emotional experiences are more and more relevant for strengthening a brand as well as enabling identification with a company. For this reason, events will remain an important marketing instrument in the communications mix of organisations in the future: If they are well staged, they promote the loyalty and identification of customers with a brand. The preceding analyses make it clear that events will continue to make a sustainable contribution to companies increasing their income and sales in the future and will promote the development of a community through networks and interaction.

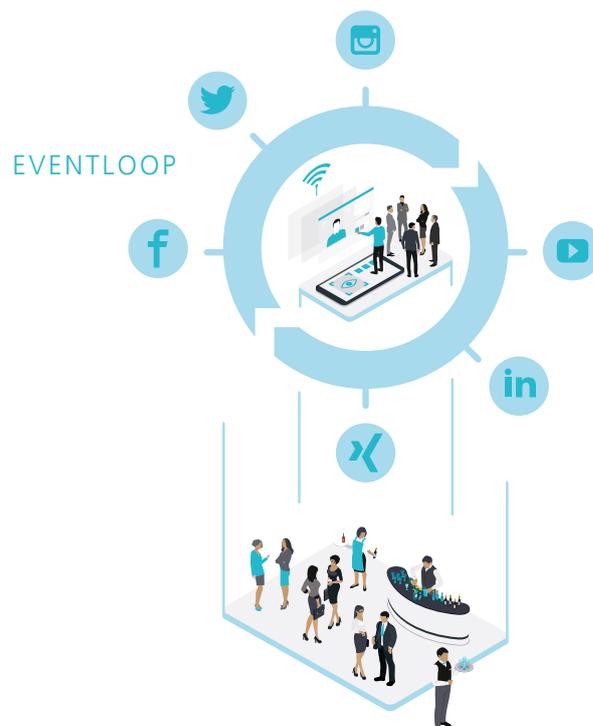


Fig. 37: Community building as a key element in the event loop.

SUMMARY OF RESULTS

Current developments also result in a broader range of events on offer. Competition is increasing and well-marketed events are crowding out others. Conversely, this could lead to a concentration on a few, high-calibre events in the future. This also means that there will be more competition for top speakers and participants as a result of the increasing concentration of events on topical issues. Based on the research results, it can be assumed that the **importance of events in the communications mix will continue to increase**. Above all, the role of **events as a hub of international relations cannot yet be replicated solely in the virtual space** and still **requires personal and physical interaction**.

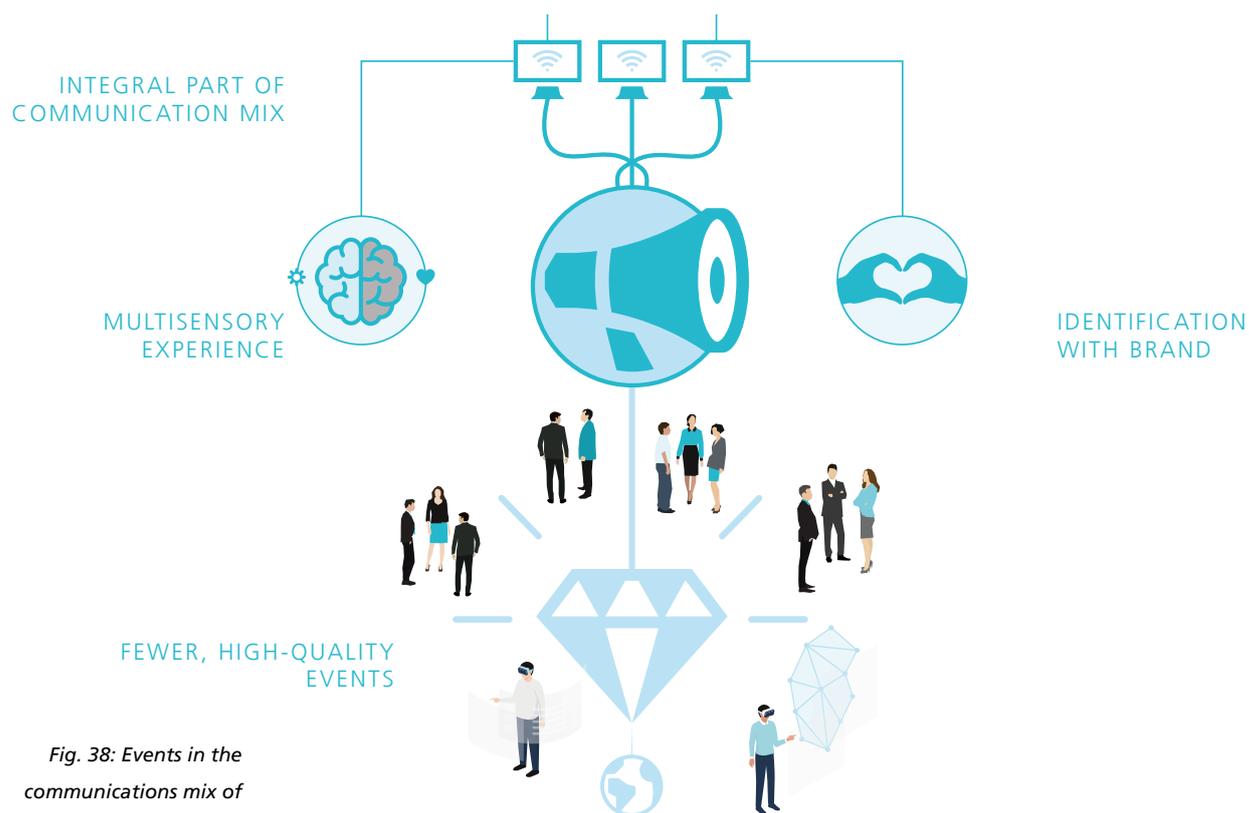


Fig. 38: Events in the communications mix of organisations.

3.3 Means of measuring success

Key figures for measuring successful events will remain the basis to compare events in the future. However, success measurements purely based on business KPIs will be supplemented by new segments that take into account both soft and hard factors.

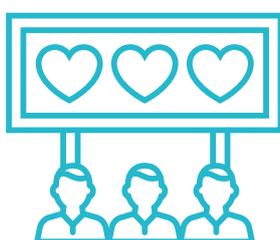
In relation to the future role of events as identified in the previous chapter, measuring repeat customers will become a new important success factor, especially as events will not be restricted to a limited time period anymore, including the development of event loops. Further important success factors revolve around how much someone learns at an event, the experiences they have and the networking they engage in. Above all, the measurement of transfer effects is considered to be of great importance for the future. It should be mentioned at this point that topical subjects must be seen as a requirement and not as a success factor to be measured, because having a topic that addresses current issues is classified as a basic requirement for a successful event in the future.

In the following, we will show which new indicators are suitable for measuring success to make corresponding statements on an event's performance, taking into account the future role of events.

3.3.1 Success indicators from the organiser perspective

The satisfaction of participants will continue to be a decisive indicator for measuring the success of events. In the future, the rate of new and repeat visitors will be an additional indicator for successful events. In a broader sense, this will measure community growth. In the long term, there will be more focus on reviewing whether a continuous community of participants develops. This aspect will become even more important due to the new relevance of interacting with the community before and after the actual, one-off event. Likewise, the recommendation rate will become a decisive metric for event organisers. From this perspective, it will be key to continuously keep an eye on the key business figures and ultimately work towards covering costs or making a profit.

NEWCOMER + RECURRENCE



RECCOMENDATION QUOTE



SOCIAL MEDIA PERCEPTION



COMMUNITY GROWTH

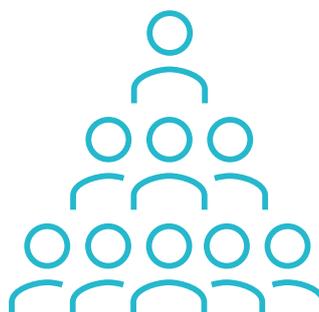


Fig. 39: Success indicators from the organiser perspective.

Being carbon neutral and the ecological footprint of events also indicate to which extent they represent added value. Given that sustainability is of increasing importance in today's society, this aspect is considered particularly important.

3.3.2 Success indicators from the participant perspective

From the participants' point of view, the success factors of networking, know-how, disruption and satisfaction must be seen in relation to the time spent and be evaluated on this basis. Additional factors that determine success for participants – encouraging or discouraging a repeat participation – are the experiences to be had at events and how much one can learn in relation to the time invested as well as interaction with other participants and speakers.

In the future, the effect of participating in events on one's own reputation will play an important role for many participants. The question is how one's own, personal "influencer value" develops as a result of attending an event, i.e., did the social network grow with new contacts or how many followers were generated through participation. It will be key if participants will be able to change their standing in social media networks based on attending an event. This less about the quantity and more about the quality of the contacts gained and the associated added value for one's own network.



With regard to the expansion of one's network, it is important to note that there will be larger and more diverse communities in the future. There can be a network between the physical, the virtual and the hybrid participants, but also within the individual types of participants. It will be important to be able to make statements about the development of the different networks to decide whether and how they need to be promoted.

Fig. 40: Success indicators from the participant perspective

3.4 Job and skills profiles of stakeholders in the events sector

The changing role of events in the future also means that the job and skills profiles of the various stakeholder groups evolve.

The following section therefore describes both the future requirements for the various stakeholder groups in the events market as well as the resulting skills profiles for the respective employees.



Fig. 41: General requirements to be fulfilled by stakeholders in the events business.

3.4.1 Event agencies and organisers

In order to respond to the changing role of events, organisers and agencies will have to develop far more agile and flexible processes in the future. They need a deep understanding of technology and must be part of an international network that allows them to very swiftly develop concepts and execute assignments. This includes access to a comprehensive ecosystem of service providers. On the one hand, it is necessary to have a very good general overview of the changing event industry and resulting trends. On the other hand, specialising on certain topics is becoming more and more decisive for agencies in order to have the corresponding contacts and in-depth knowledge in specific subject areas.

A sound understanding of the new diversity and complexity of hybrid events is also becoming increasingly important, as is the associated willingness to change and adapt to current trends, especially when it comes to technology and methods.

Agencies are increasingly acting as *community managers* and are responsible for building a community around the actual event. In the future, the separation between agencies and event organisers will more and more blur.

As it is becoming increasingly important for the agencies and organisers of tomorrow to build communities around their respective events, they should work with *community managers*, i.e., open-minded, outgoing people who are preferably already well connected with regard to the specific event topic. *Community managers* aims at building and maintaining a network that is active before, during and after the event.



Fig. 42: Community manager.

As agencies should be focused on topics, they need *trend scouts* who specialise in a particular topic. They are responsible for creating a network of experts and specialists whom they can identify and connect based on their expertise. The profiles described can also be found in one single person. In order to build a community, in addition to a *community manager*, a *socialiser* and a *trend scout*, an *interface manager* is needed who knows how to mediate and communicate between the virtual and physical participants and build an overarching network between both worlds. This requires professional skills regarding hybrid set-ups and a deep understanding of technology. With their expertise, *interface managers* can support events or communities revolving around different topics. They work hand in hand with the *experience designer*, who plays a key role when creating future events and needs storytelling skills. *Experience designers* are creative and know how to stage events to achieve a unique experience for the participants when developing their event concepts. The ultimate goal is to achieve a high degree of customer loyalty. In addition, future event organisers must also become *data architects* or expand their skills by working with them. It will play an essential role to be knowledgeable in data modelling as well as have computer science skills to be able to handle the interface between analogue and digital in the event sector.

3.4.2 Service and infrastructure providers

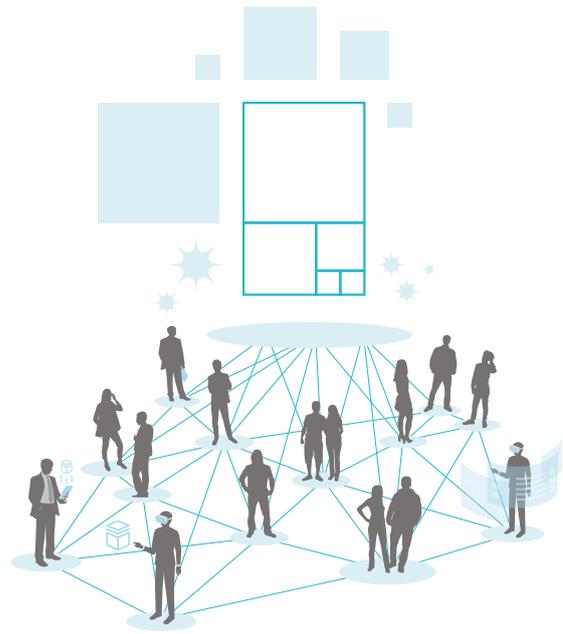
Infrastructure providers

With regard to event venues, we can differentiate between two main types. On the one hand, there will be event venues that are in themselves a unique attraction and have built their own brand around a specific topic. The venue lives of itself, so to say, and how it presents and markets itself. On the other hand, there will be venues that adapt to the event and will do anything to provide the best possible surrounding and set-up for it. This requires fast, flexible design and a flexible ecosystem in terms of service providers such as catering. Especially the highly flexible, adaptable venues need to be as open as possible to new formats and be able to provide a variety of functionalities at short notice in order to be able to flexibly adapt to the requirements of their customers. In the future, people will no longer just hire an event venue, but a world individually staged according to their own ideas. Event venues need to provide real-time availability information and be adaptable, authentic and unique.

UNIQUE ATTRACTION
OWN BRAND



MODULAR ROOM WITH ENDLESS
ADAPTABILITY AND FLEXIBILITY



The above means that future venues will need the organisational talent of meeting architects who have special know-how about the venue, but also expertise in the field of meeting design.

The increased focus on hybrid events also brings more technical demands for venues, which in turn means more technical skills will be needed in future as well as closer cooperation with technical service providers. The focus here is on digital twins of event locations and comparison platforms for rating purposes but also for offering interim use options. Venue providers should also continuously increase their know-how in the area of hybrid events.

In the future, venue providers will have to offer their customers more options and freedom. This also applies to all other service providers involved.

*Fig. 43: Venue providers:
completely specialised vs.
extremely flexible.*

Service providers

Technical service providers in particular are increasingly becoming intermediaries between the virtual and physical and thus also the hybrid world. They must offer a wide range of solutions as well as be highly knowledgeable about hybrid events and the technical equipment required for them. This also includes being able to provide expert consulting and to come up with solutions. In addition, technical service providers need to be part of an ecosystem which includes venues and other service providers and be connected accordingly. Knowing about how to stage events emotionally in hybrid-set-ups is also becoming more important for technical service providers.

In detail, this results in core skills profiles for future employees in the event industry. Hybrid event set-ups and the challenges they come with mean that employees are needed who are *very competent in finding solutions* in order to meet the requirements of virtual, physical and hybrid participants.

In the service sector, employees with professional *staging skills* are becoming increasingly important. These service providers should have a high level of expertise in the field of corporate design and corporate identity and be able to stage the company's brand at the venue. Authentic illusory and staged worlds along the lines of Walt Disney are in demand here. Service and infrastructure providers also need *ecosystem managers* who are able to build a network of efficient service providers. This requires competent professional people who are communicative and open and who are already very well connected, with long-standing experience of working in this area.

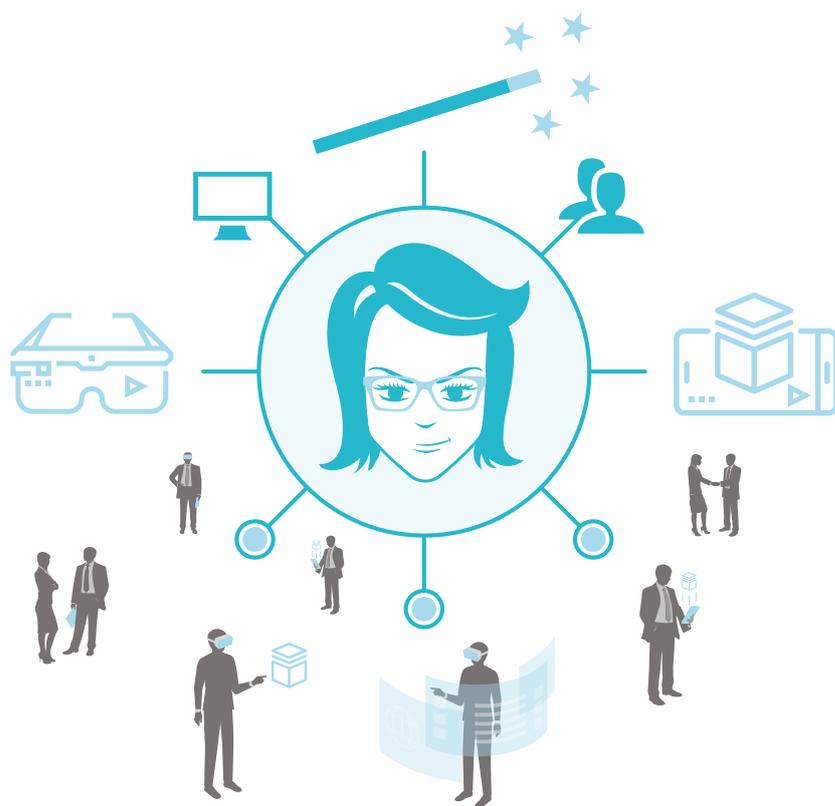


Fig. 44: VR/AR designer.

Regarding technology service providers, the demand for *virtual reality experience designers* who support staging artists with their technical know-how in the creation of a new, tangible world will increase strongly. In addition, people who have a strong interest in digital trends and new technologies and can deal with new technical requirements (*early adopter/innovation manager*) should be integrated into the team. In this context, being able to transfer know-how to the event sector and a certain creativity in implementing new ideas is an essential skill. Furthermore, the demand for *composition architects* who have skills in camera work as well as the necessary eye for editing will increase. Virtual and hybrid events also demand new skills from speakers and moderators. In order to improve one's screen presence, media & moderation coaches can help optimise facial expressions, gestures and speaking style.

3.4.3 Destination marketing organisations

Community-building skills are also becoming increasingly important for destination marketing organisations (DMO). They need to be part of a dense ecosystem and have quick access to it. The primary challenge of this stakeholder group will be to identify what is special about a region and develop it. They act as *regional trend scouts* in the broadest sense, and it will be beneficial for them to bundle identified trends in a network.



Abb. 45: Trendscout.

It could also make sense to get together with partner regions in order to be able to complement one's own regional offer and thus be able to provide customers with the best possible, unique experience. In order to do that, the role of a partnership promoter will become more and more important in the future. Someone who is communicative and open, has know-how across regions and can act as an interface between different regions. Furthermore, digital real-time access to what regions can offer is essential. The digital competence of DMOs and systematic data management are essential foundations for the services they have to provide.

In order to be able to fulfil the requirements described above, it will become important for DMOs to employ a *regional trend scout*. This should be someone who is familiar with the regional USPs and whose goal is to promote and strengthen the region in the long term. In order to best support this process, a local expert who is passionate about and greatly interested in their region, can add to the professional know-how existing within DMOs. Local experts are able to identify their region's potential and, based on this, can also advise on the development of new business models for the region. In this context, DMOs also act as platforms that, in addition to providing information and data on e.g. hotels, event venues and travel information, are primarily *local experts*, offering inspiration and information about current trends and special features.

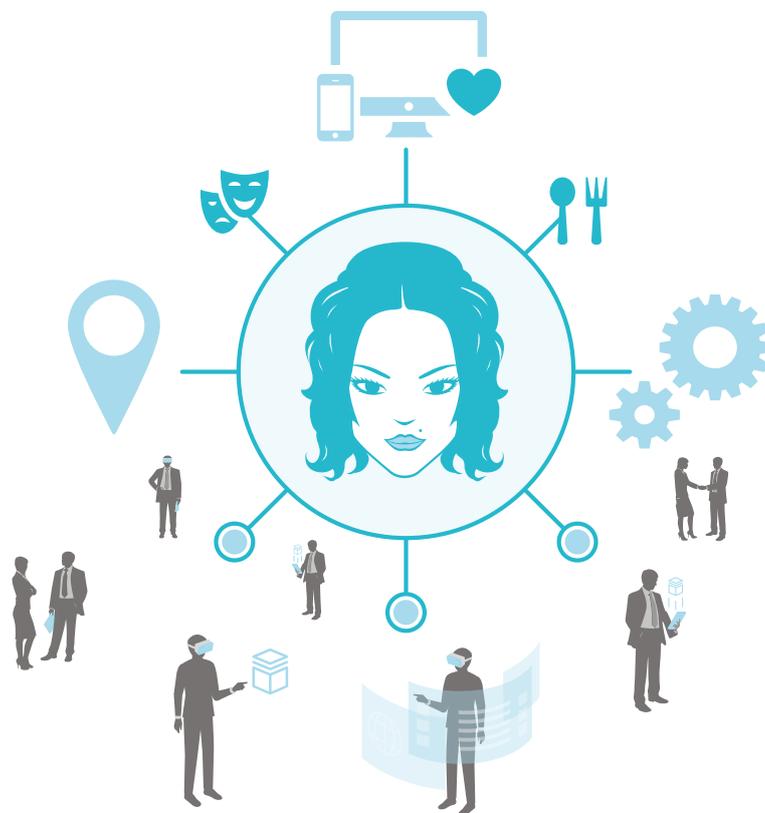


Fig. 46: Ecosystem manager.

SUMMARY OF RESULTS

Acting as ecosystem managers, they have to consider multiple perspectives and orchestrate them. This requires the development and continuous strengthening of a long-term regional, national and international network. This destination-related know-how means that DMOs will have an even more important role in the future.

In the future, they must act as a link between regional service providers and be well connected beyond their location, both within and outside the industry. This requires the targeted consolidation and bundling of the multi-layered skills that exist within destinations to focus them on a common, overarching strategy. To do that, expertise in the area of skills clustering is needed. In the future, DMOs will therefore have to be highly agile and organised as decentralised and independent entities. In their important function as a decentralised supervisor, they must not lose sight of the authenticity and identity of their regions.



4 FUTURE SCENARIOS/ RECOMMENDATIONS FOR ACTION

4.1 General recommendations for action

Implicit knowledge transfer and spontaneous experiences

The trend towards more hybrid and virtual events as enriching elements of conventional, physical events will intensify in the future and increase competition with regard to participants and speakers. In order to withstand the expansion into new spaces, it is necessary for physical events to re-focus on the characteristics that cannot be offered online for the time being. The previous analyses clearly show that the main motivation for participants to attend an event is the opportunity to network – both with speakers and with other participants – and to develop their existing know-how as well as gain new insights. This is not only about expanding knowledge while sitting in an audience and listening to a speaker, but above all about implicit knowledge which is attached to people and which can primarily be acquired in smaller discussion groups or one-to-one conversations. Implicit knowledge is based on experiences and insights, the transfer of which is also dependent on a personal, emotional relationship.

To support the implicit transfer of knowledge, it will be particularly important in the future for all areas of physical events to provide many options for participants to meet and interact spontaneously but also in the context of organised networking. This applies equally to the social programme and to the way the event venue is set up. Integrating informal zones is an essential factor that can considerably promote networking. According to the expert group, these zones work particularly well when combined with food and drink offers. After all, innovation and creativity as promoted in face-to-face conversations need surroundings where people feel comfortable and that invite informal chats alongside focused discussions on certain topics. In combination, such easy going conversations can trigger new ideas and innovations. Further design elements can be found in the recommendations for action for service and infrastructure providers (see 4.2.2).

The format of an event can also increase communication and interaction between participants on-site. It is important to reduce the amount of presentations where one speaker talks to an audience and at the same time increase interactive elements, such as speed dating formats, break-out sessions without a predefined, planned structure or small workshops. In addition, new digital tools such as VR experiences for groups can support the networking of virtual and physical participants in hybrid events. In this context, ongoing developments with regard to technologies and methods must be kept an eye on. The implementation of new, innovative and creative concepts that focus on personal interaction requires the courage to try out new things and question the way things have been done so far. The future of events event requires above all sufficient scope for experimentation. A high tolerance for misjudgements and for the risk of failing with some of the experiments tried is needed – and the participants should be made aware of that, too.

Community with participatory character

So far, events have been defined as time-limited, planned occurrences with a specific intention or objective. However, the results of our focus groups and the Delphi survey paint a different picture for the future: Successful events in the future will not only be a snapshot of a specific moment in time but consist of an endless event loop. Creating a community that is focused on a certain topic or shares certain values around an event is therefore of great importance, also to attract as many repeat customers as possible. The specific, time-limited event is only one, albeit key, element of an entire ecosystem around a community, whose connecting link is the interest in a certain topic. As the time limit that so far applied to events is done away with, the term event should be defined differently or be expanded.

In order to increase interaction within the community, it is necessary to continuously provide information and engage the community members. What is being organised for the before and after of events will therefore gain increasing attention in the future. Providing content via social networks and digital platforms can keep the discussion among community members going. It is important to understand that social media communication is characterised by emancipated users.¹⁸ Passive listeners become active communicators. The organisers as community founders increasingly take on a moderator role and the members become part of a lively "chat show", mutually interacting. The community controls the content, companies can only make contributions and provide ideas.¹⁹

18 See Fieseler, 2010

19 See Kreutzer, Hinz, 2010

As social media content changes quickly and attention is a limited resource in the digital age, it is particularly important to provide the community with short units of content and to really understand which content could be relevant for the community.²⁰ In this context, short learning nuggets as well as visual or animated content can be a good alternative to long text with often too much information.

According to our analysis, this participatory approach including a wide scope for the community to shape things will also have an impact on the planning of successful events. The community wants to be actively involved, e.g., choosing speakers, catering, venues and possibly also formats. This can be done via voting and competitions. Involving participants in certain aspects of events, can also be a creative source and positively influence events.²¹ In order to use the ideas being generated by collective intelligence, the participants must be given room to participate by expressing their personal opinions. This also has a positive effect on long-term commitment to events and the respective communities.

"People want to be part of an ongoing process and have the opportunity to change things!"
(Anonymous, focus group 2)

In order to make positive use of the new dynamics in space and time, the internal organisation of organisation needs to be flexible and changeable. Companies must be able to act quickly, especially when working with social media communities. Mistakes in implementation should be corrected quickly and be able without long preparation. For the execution of the recommendations for action, a high degree of agility is crucial.²² Only then can event organisers, service and infrastructure providers and DMOs avoid being left out or behind and instead be part of the process. The event of the future is not a finished, final solution, but a flexible communication element that needs ongoing development.

20 See Mohr, Thiesen, 2019

21 See Bruhn, Hadwich, 2013

22 See Fiesler, 2010

Summary

- The space and time factor will change in the future in the sense of events becoming more boundless.
- The physical elements of events will increasingly be characterised by the transfer of implicit, personal know-how.
- Promoting knowledge exchange requires informal spaces with a feel-good character. These spaces should also already exist before events.
- Event formats such as speed dating and break-out sessions can further increase interaction.
- In the future, one-off events will be replaced by an "event loop". Communities will be created around the respective event topic, especially in social media networks.
- The community actively participates in the design and organisation of the event, with organisers taking on the role of fostering discussions.
- Short information in the form of learning nuggets, partly in visual and animated form, can be easily processed by the community.
- The new dynamics in space and time require the event industry to everywhere work with flexible structures in order to be able to react quickly to future change.

4.2 Specific recommendations for action

In addition to the general recommendations for action based on the previous findings, we present, in the following section, specific recommendations for action for different stakeholder groups in the event industry. These recommendations are intended to provide initial starting points for building a future-proof events sector.

4.2.1 Recommendations for actions for event agencies and organisers

In the future, event agencies and organisers in particular will have to deal with trends such as more international competition, faster innovation cycles in technologies and methods as well as with organisational change. These affect how agencies and event organisers have to be set up internally in order to meet requirements regarding the complexity of tasks, flexibility, goal orientation and communication.²³

In general, the new, dynamic environment we are living in requires maximum responsiveness, which agencies and organisers can manage by working flexibly and in more agile ways. In addition, companies should be part of an international knowledge cluster that, depending on the topics agencies specialise in, can integrate external specialists in interdisciplinary teams (see also 3.1). This increases the continuous knowledge transfer because other experiences come in and also makes employees more open to external ideas.²⁴ In order to increase specialist know-how, there will be more temporary and project-related staff in addition to permanent employees. Besides, agencies and organisers ought to seek close cooperation with service and infrastructure providers, which concentrate on similar topics, as well as with DMOs. Networks are not only important within events, but also when it comes to organising them. This requires cooperating across locations and with groups of experts who are not in the same area.²⁵ Crowdfunding platforms are one way to engage in easy networking with experts and outsource different tasks. These platforms not only enable accessing a larger pool of specialists in the future, but also flexible and agile reactions depending on the workload.

In addition to specialisations on different topics, the event market of the future also requires generalist agencies and organisers.

"Events of the future need both specialists and generalists." (Anonymous, focus group 1)

This statement refers, among others, to technological and digital trends. Digital technologies are currently revolutionising all areas of the event industry, e.g., measuring success (see 2.2.1). For the effective use of the different tools, cooperation with digital trend scouts is a must.

23 See Stephan, Rötz, 2016/17

24 See Daum, Wedel, 2020

25 See Boos, Hardwig, Riethmüller, 2017

As far as possible, all employees of an agency should benefit from the skills of the different expert groups with regard to content, technology and organisation. Working with an in-house knowledge management system can contribute to not only continuously increasing internal know-how, but also to promote learning within the core team in the long term.²⁶

In the future, agencies and event organisers will need to be more knowledgeable. Therefore, organisations are needed that not only steer but also actively shape events.

Summary

- In general, the way agencies and organisers work must allow for even more flexibility and agility than before in order to be able to react more quickly to new circumstances.
- In order to harness the specialisation on specific topics as a USP, selective or regular but always trusting cooperation with external staff is crucial in order to integrate and expand the necessary expertise.
- In addition, agencies and organisers should intensify their cooperation with service and infrastructure providers as well as with DMOs that focus on identical topics.
- In order for all team members to benefit from external know-how and to use digital innovations, it is necessary to work with a company-internal knowledge management system.

4.2.2 Recommendations for actions for service and infrastructure providers

The changing general conditions also lead to different demands on service and infrastructure providers. A higher degree of independence from physical spaces due to a higher number of virtual events does by no means result in physical spaces losing their importance. How spaces are created and the technology used at event venues will become all the more decisive in the future.

When choosing a destination, the focus will in future be on both hard factors, such the ease of getting there or value for money, and soft factors such as the atmosphere and mood provided by event venues. The physical space can do a lot to stimulate social interactions and convey

26 Vgl. Kaftan, 2018

positive emotions to the participants.²⁷ Creating a staged experience within the event venue can contribute to fostering an emotional relationship with the place itself, resulting in higher participant loyalty because values such as authenticity and uniqueness are conveyed (see 2.3.1). So-called "brand lands" are experience worlds that are designed depending on the event content. True to the motto: "Experience and remember!"²⁸ the design of an experience world that aligns with the topic of an event can lead to key moments for participants and generate real added value compared to virtual events by promoting emotional, multi-sensory instants.

Creating "brand lands" with stimulating vibes requires creating an awareness that the event space is not just something that provides an infrastructure. Mood and emotion are usually conveyed through a mix of entertainment, consumption and learning in a multi-sensory environment. This scenery should make people curious and surprise them and take participants on an unexpected journey that has nothing to do with their everyday routines. With regard to the design elements of spaces, this means not only providing flexible and changeable furniture to support different event formats and the development of a diverse event setting, but also the use of elements that have nothing to do with conventional office work life. Co-working or co-living spaces, for example, can be inspiring. In this context, the interior design should include elements that can be found in people's homes or in a leisure context, such as comfy sofas, plants and spaces that combine "work and play" and can thus lead to mixing work and leisure in one place.²⁹ Some co-working places also work with aesthetic design principles as found in cafés or living rooms. All of this revolves around the idea of creating a stimulating space that offers diverse types of inspiration and encounters. The previous analysis revealed a similar picture. Above all, the results of the Kano survey show a strong desire among event participants for different, diverse event set-ups that deviates from the conventional image of many event spaces. Event venues of the future therefore urgently need new space concepts, the basic idea of which can certainly be derived from creative spaces and co-working spaces.

27 See Drasdo, 2018

28 See Nufer, Scheurecker, 2008

29 See Sutter, Flor, 2017

Summary

- The design of physical venues will be very important in the future, despite an increase in virtual events.
- In the future, venues should be understood as staged experience worlds that create atmosphere and mood and contribute to an emotional relationship with the place.
- So-called "brand lands" should be developed depending on the event content, true to the motto "Experience and remember!"
- The structures of spaces should support the mixed offers of entertainment, consumption and learning in the best possible way.
- For the interior design, co-working and creative spaces can serve as models for developing new concepts.
- The use of non-work elements is considered a great opportunity for mixing "work and play" and creating spaces that integrate elements from other environments such as café.

4.2.3 Standortmarketing-Organisationen

Destination marketing organisations (DMO) play a key role in shaping future events. They act as regional trend scouts in an interdisciplinary and cross-sectoral network (see 3.4.3). In this position, they are able to support event organisers in the implementation of their events with their regional expertise, making events more authentic and strengthening their identity.

Each regional environment is distinctive and has its own identity, based on its history. It is removed from any zeitgeisty, global megatrends. Local and regional places have become more important, not least because of the Covid-19 pandemic. Although they do not replace the ongoing globalisation trend, they will nevertheless exist as a counter-trend in certain areas. The pandemic created a new awareness of the fragility of global value chains plus, it is becoming more important to act according to environmentally conscious and sustainable standards. These developments also led to the results of focus groups and Kano surveys of the research project displaying a favourable view of multi-site and regional events.

When identifying typical characteristics of their region, DMOs should concentrate on the following questions: What is our regional context? What are typical social and economic aspects? How can specific characteristics be promoted? When analysing locations, it is necessary to cooperate with trend scouts who have a personal or professional relationship with

the immediate environment in question; with individuals who know both the historical narratives and interesting regional trends. In addition, social media channels can also serve as sources for ideas to get insights about specific identity elements of a region and to win over the community as a link and contributing factor. Accordingly, both internal and external communication should be transparent and open in order to generate a region-specific image that corresponds to what is currently going on in society. Top-down and bottom-up approaches should complement each other here.³⁰

DMOs should always be part of a regional network. The network should consist of companies with a strong historical connection to the region as well as of start-ups and research organisations that transport new experiences and know-how into the region. The regional network should be subject to an overall location strategy. Events of the future will also take place as multi-site events (see 2.2.1). Pop-up stores are seen as a way to spontaneously and flexibly expand events. To implement this future scenario, a portfolio of pop-up and other bookable spaces in addition to the classic event venues is needed. Providing comprehensive location expertise, DMOs will be able to support the choice of infrastructure and service providers in the future as well as positively influence the image of their regions.

Summary

- DMOs will take on a key role in the future, acting as regional trend scouts in an interdisciplinary network.
- Each region is unique with an authentic character and specific identity.
- In combination with a growing interest in sustainability, glocalisation as a counter-trend to globalisation puts a new focus on the authentic spirit that regions can offer.
- By identifying typical characteristics of regions, based on historical narratives and current trends, DMOs can support the implementation of authentic, regional events.
- Regional networking with companies and institutions and the development of an overall location strategy are important.
- For the implementation of multi-site events in temporary venues such as pop-up spaces, the development of a portfolio can expand location expertise.



5 SUMMARY

2020 was to a large extent characterised by the Covid-19 pandemic and the same will likely apply to 2021 as well. Many organisations were forced into a digital transformation process. Events and collaboration have largely taken place virtually since the start of the pandemic, which has had the effect of a catalyst for digital tools, virtual and hybrid event formats, as well as virtual interaction and collaboration.

At the beginning of the third research phase of the "Future Meeting Space" innovation network in July 2019, such developments were not to be expected. In the course of 2020, the importance of keeping an eye on development in the events sector and, moreover, to anticipate them became all the clearer. Suddenly, future scenarios such as the multi-site congress as we had described it in the first research phase became real. Events in a purely physical environment were partly eliminated completely, and virtual and hybrid formats made a quantum leap. This reduced time-consuming travel and the corresponding costs, but at the same time increased the participants' desire for personal interaction and informal networking. In order to be able to meet these demands, new formats were developed to be able to enable interactive and co-creative processes in the virtual space.

In addition to these developments, the authors of this study are convinced that the lack of face-to-face encounters in recent months will again lead to events taking place in physical spaces in the future. However, as the study shows, modifications are needed in order to do justice to the change we are experiencing. In the future, events need a strong topical angle. They need to be diverse and come across as authentic. The need for hybrid event set-ups requires a perfect combination of the virtual and physical world in order to inspire participants and build a long-term community around events.

The event world is facing a similar profound change as, for example, the media industry and especially newspaper and magazine publishers have already experienced it for years in light of digital competition. The Covid-19 pandemic brings about a kind of "fast forward" to the future. People will still want to meet but new formats, services and business models will be the winners. The event ecosystem will change considerably and for the long term. The key success factor in this system is the unconditional focus on customer and participant needs, because they ultimately decide what they will spend their time on in the future and they will do so much more consciously.

In 2021, the GCB German Convention Bureau, together with the Fraunhofer Institute for Industrial Engineering IAO, will continue to focus on these challenges of the post-Covid era with the "Future Meeting Space" innovation network and conduct related application-oriented research.

Our 2021 research topic highlights the new opportunities created by the changing ecosystem and examines the new general conditions and interrelationships of relevant influencing factors. Based on this, we will create usage scenarios for real, hybrid and virtual event spaces that are embedded in the new and changed ecosystem.

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