Research & Insights Webinar

VisitBritain Business Events

17th July 2025

Edinburgh, Scotland ©VisitScotland / Kenny Lam


Liverpool, England ©VisitBritain/Luke Jerram/Phil Nixon

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Housekeeping

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Slides and recording will be shared post-webinar

If you have any further questions following the presentation today, please reach out to the Business Events team

Global business events performance

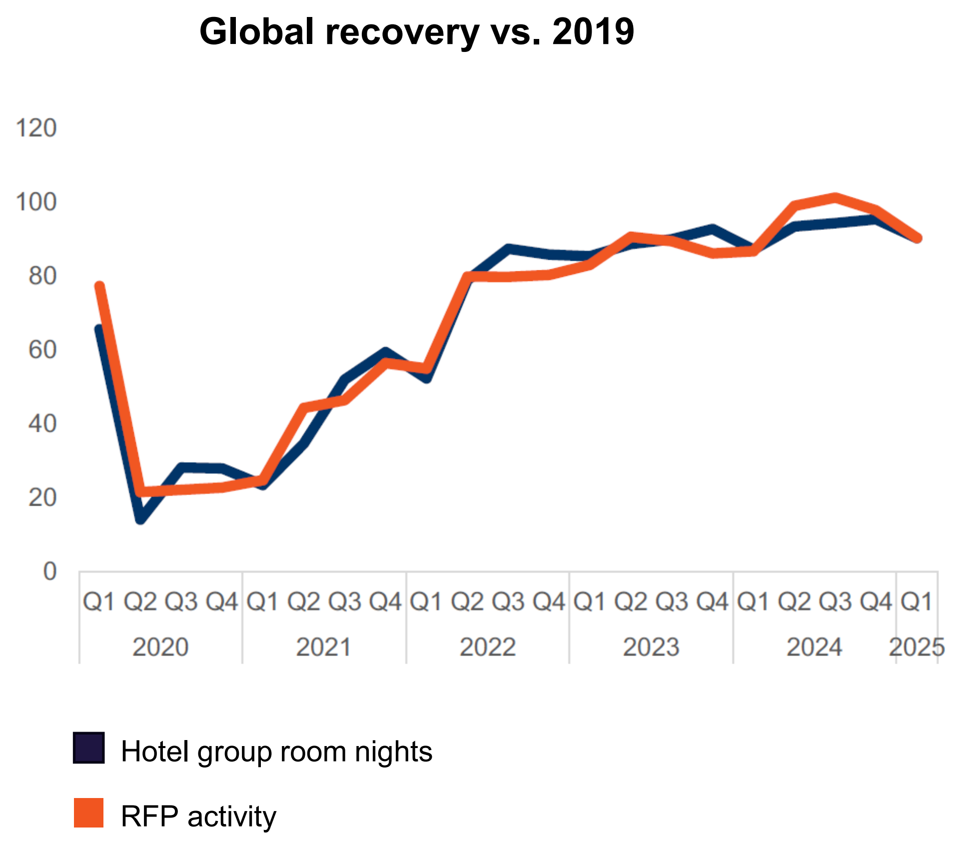
Events Industry Council

Global Events Barometer

VISIT BRITAIN

VisitEngland

Events Industry Council | Sustained growth across 2024 in event activity amidst economic and geopolitical volatility



Hotel room nights: **90% vs. 2019**

Small events: **89% vs. 2019**

RFP activity: **90% vs. 2019**

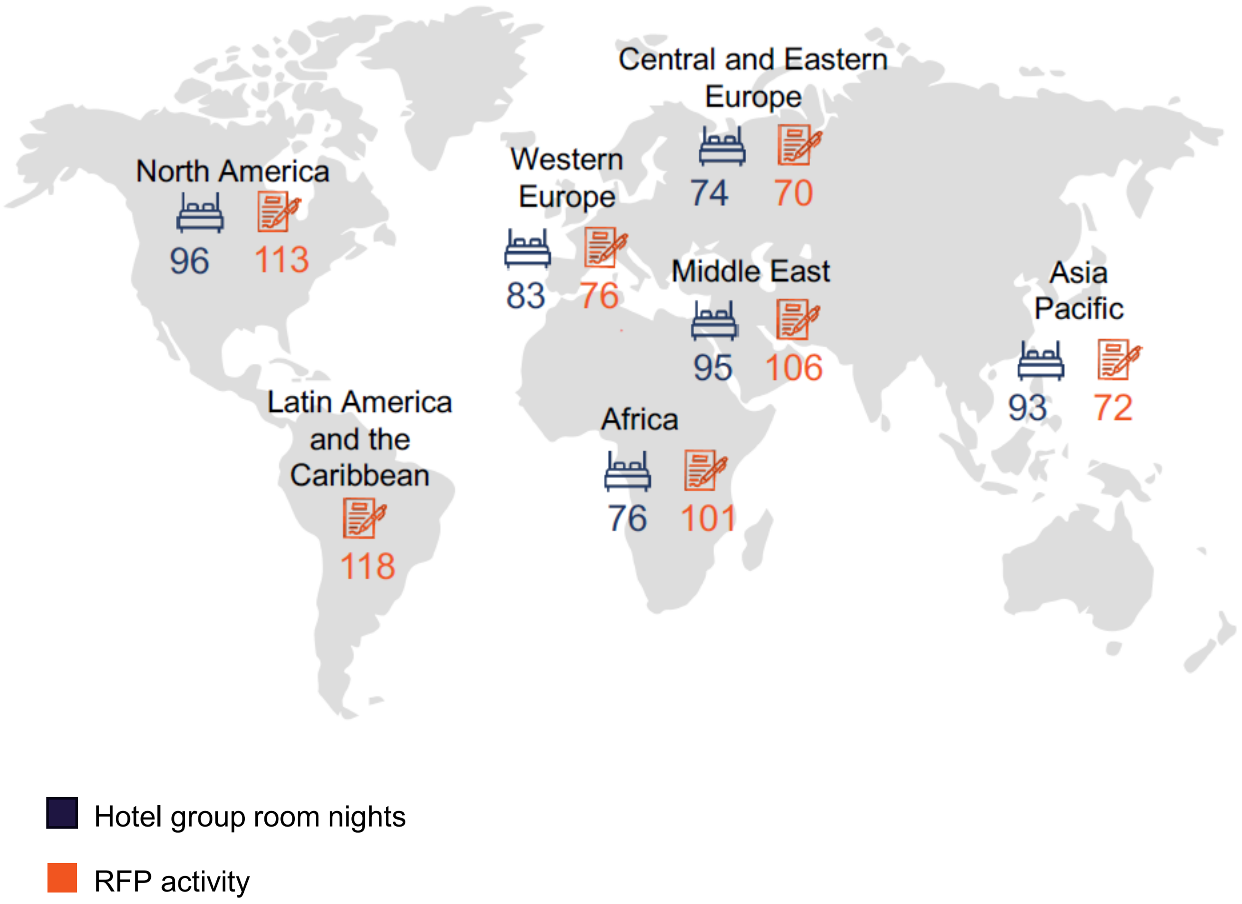
Med. & large events: **101% vs. 2019**

- In 2024, Business Events performance maintained robust growth, dipping slightly from Q4 2024.
- While Q2 and Q3 saw a steady rise in hotel room nights, RFP activity experienced a sharper increase; both trends then leveled off by Q4 and declined slightly in 2025 Q1. Despite this recent drop, both metrics remain stronger than in Q1 2024.

Source: EIC Global Events Barometer, Q1 2025, with Oxford Economics, STR, Amadeus' Meeting Broker, Cvent

Events Industry Council | UK recovery in hotel group room nights and RFP activity exceeding Western European average

Global business events index vs. 2019



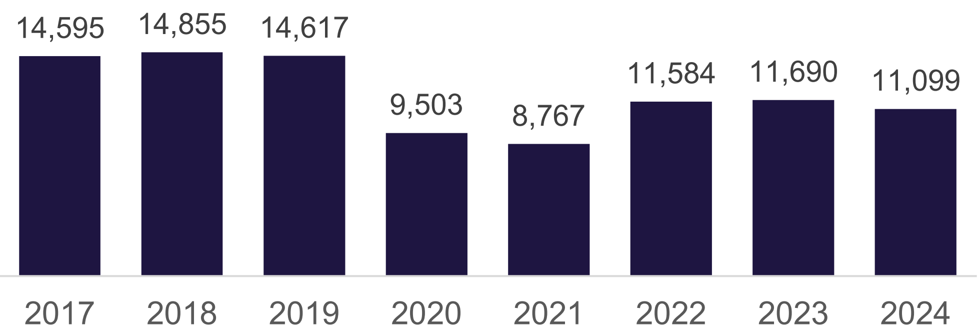
- Looking at individual markets, we see the UK ranking 1st in Western Europe for hotel group room nights in Q1 2025, but with growth below global average (84% vs. 2019, vs. 83% Western Europe, vs. 95% globally).
- The UK is also 3rd in Western Europe for recovery in RFP, after Spain and Italy (79% vs. 2019, vs. 76% Western Europe, vs. 90% globally).

Source: EIC Global Events Barometer, Q1 2025, with Oxford Economics, STR, Amadeus' Meeting Broker, Cvent

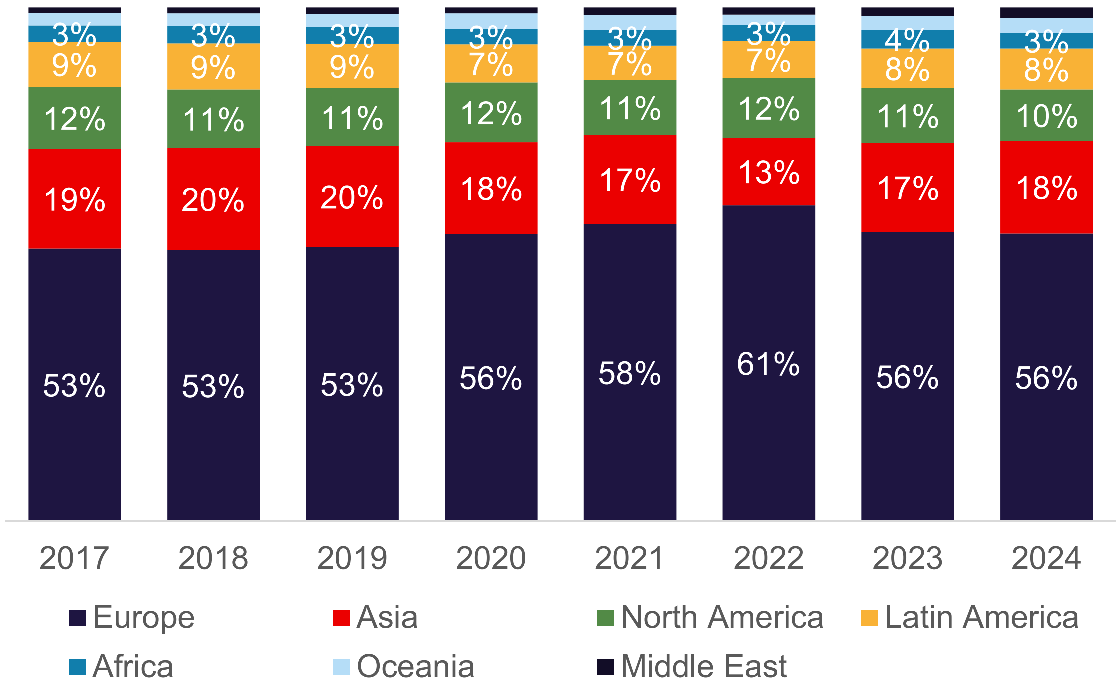
ICCA
Business Analytics Statistics Report

ICCA | Global meetings at 76% of pre-COVID levels, with regional share largely consistent YoY

Number of meetings per year



Global regions share of meetings



- Over 11,000 international association meetings were recorded in 2024, demonstrating an upward trajectory and a 76% recovery in event figures since the pandemic.
- Compared to 2023, the percentage split across all global regions remained roughly consistent, suggesting stable demand in these areas.

Source: ICCA Business Analytics Statistics Report 2024

UK business events performance

The UK Events Report 2024

UK Events Report | Events industry delivers £61.6bn to UK economy

	Sector	Value
Business Events = £33.6bn	Conferences and Meetings	**£16.3bn**
	Exhibitions & Trade Fairs	**£10.9bn**
	Business Travel Meetings	**£4.0bn**
	Incentive Travel	**£2.4bn**
Leisure / Outdoor Events = £28.053bn	Arts & Culture	**£5.6bn**
	Fairs and Shows	**£6.0bn**
	Music Events	**£6.6bn**
	Sporting Events	**£9.753bn***
	Air Displays	**£100m**
Total = £61.653bn		

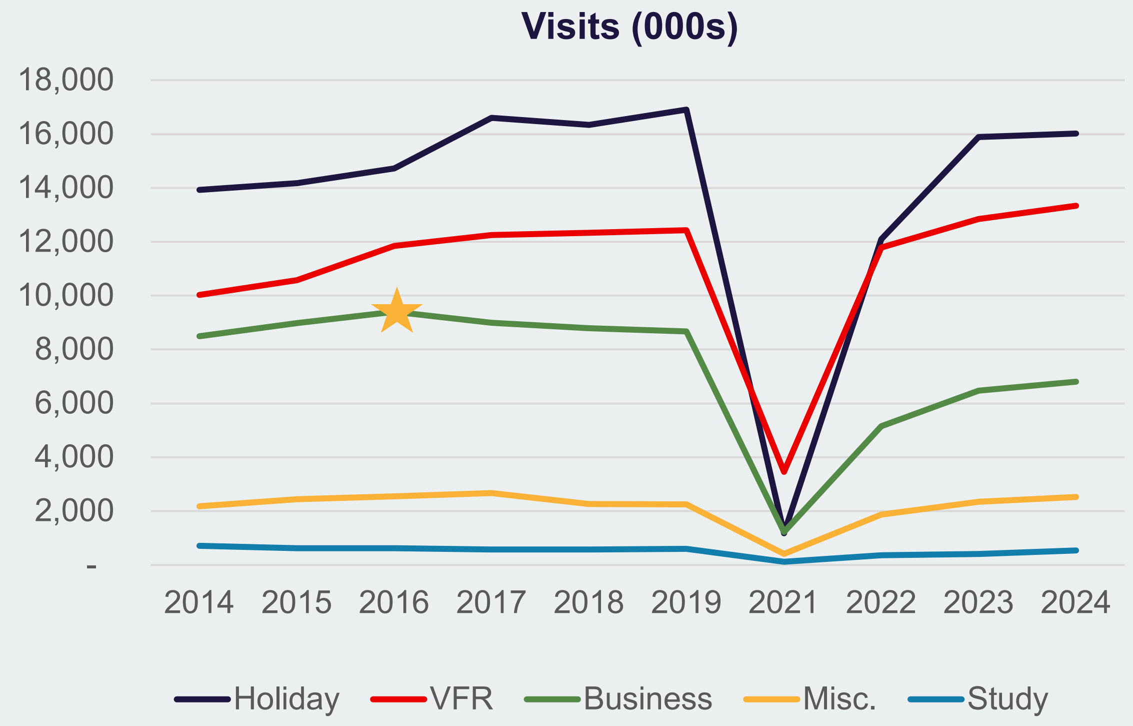
"The events industry is a significant contributor to the UK's economy, generating billions of pounds in revenue and providing numerous jobs across various sectors. It plays a crucial role in tourism, commerce, and cultural exchange that currently contributes ***£61.65bn*** *to the UK economy."*

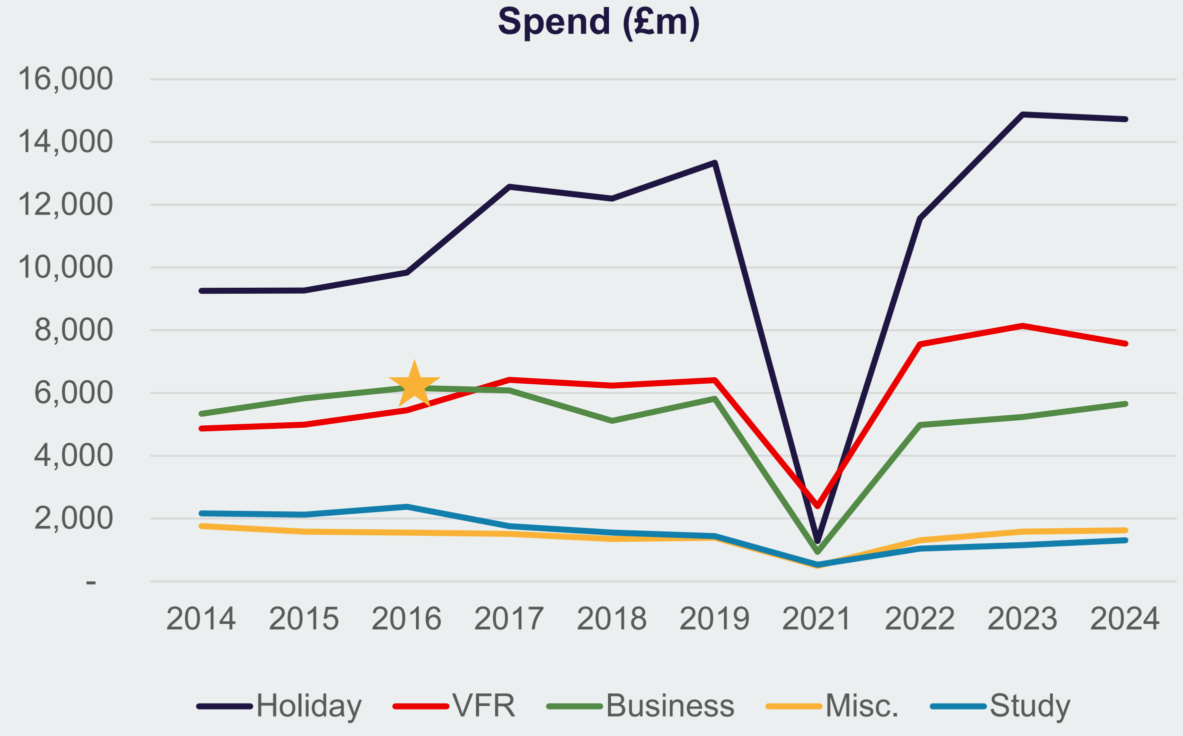
Source: The UK Events Report 2024 *This varies from year to year, and the above is based on 2019 published figure updated with 2023 known additions including Birmingham Commonwealth Games

VISIT BRITAIN VisitEngland

International Passenger Survey

IPS | 6.8m business visits in 2024, spending £5.7bn in the UK





- In 2024, overall inbound Business visits recovered to 78% of 2019 levels – one of the slower recoveries among journey purposes. However, growth vs. 2023 was at 5%; the third second fastest growing journey purposes.
- Looking at spend, in 2024 97% of 2019 spend was recovered (78% in real terms), with a 8% growth vs. 2023 (5% in real terms). Business travel has lost some share vs. other journey purposes since 2019 (21% vs. 17%).

Source: International Passenger Survey, ONS ★ = record high. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

VISIT BRITAIN VisitEngland

IPS | In 2024, over one third of business spend came from Business Events visits

In selected years since 2016, VisitBritain has included an added question on the IPS to identify types of business travellers. Within the categories included, business events visitors include business travellers for:

- Meetings (21+ attendees)
- Incentives/Team building
- Conferences/Conventions/Congresses
- Exhibitions/Events/Trade shows

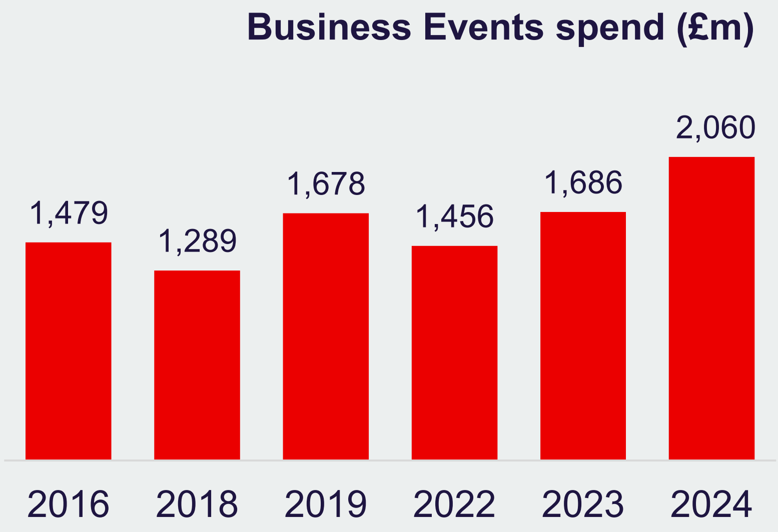
1.9 million Business Events visits were made to the UK in 2024, constituting **28%** of all Business visits, and **5%** of all visits.

8.5 million nights were spent by Business Events inbound visitors in the UK in 2024, constituting **27%** of all business visits nights, and **3%** of all inbound visits' nights

Business Events visits accounted for **£2.1 billion** in spending in the UK in 2024, constituting **36%** of Business spend, and **7%** of all spend

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

IPS | Business Events recovered above 2019 levels, alongside stronger year on year growth



- In 2024, inbound Business Events visits reached 2019 levels and went over by 6%; a faster recovery vs. Business visits overall at 78%. Visits growth vs. 2023 was also stronger for business events (27% vs 5% for business visits).
- Looking at spend, Business Events grew by 23% vs. 2019 (-1% in real terms), and by 22% vs. 2023 (19% in real terms). This spend growth is also stronger compared to what we see for the Business purpose overall.

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

VISIT BRITAIN VisitEngland

IPS | Business Events inbound visits are highly valuable compared to the average inbound visit overall

Business Events:	**4.5** nights per visit	**£1,091** spend per visit	**£242** spend per night
Total Business:	**4.7** nights per visit	**£832** spend per visit	**£177** spend per night
All journey purposes:	**7.4** nights per visit	**£790** spend per visit	**£107** spend per night

- Business Events visits in the UK tend to be shorter compared to other types of inbound visits. However, these are more valuable, with average spend per Business Events visit being 38% higher than average in 2023 (and 31% higher vs. Business visits overall), with spend per night over double that of the average visit.

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

IPS | Conference and large meeting inbound visits represented the majority of Business Events visits and spend in 2024

	Visits (000s)	Visits (% within BE)	Nights (000s)	Nights (% within BE)	Spend (£m)	Spend (% within BE)
Conference/Convention/ Congress	694	37%	2,988	35%	706	34%
Meeting (21+ people)	612	32%	2,608	31%	690	34%
Exhibition/Event/Trade Show	366	19%	1,706	20%	414	20%
Incentive/Team Building	216	11%	1,197	14%	249	12%

- In 2024, the largest category of visits within Business Events was ‘conferences, conventions and congresses’, the source of 694,000 visits, with an associated spend of £706 million.
- Incentive / team building inbound visits had the largest average nights per stay with 5.5 nights per visit, vs 4.5 nights per visit among all Business Events visits. Incentive / Team Building inbound visits had also the highest average spend per visit (£1,154), while Large Meetings inbound visits had the largest average spend per night (£265).

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of ‘official statistics in development’, which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

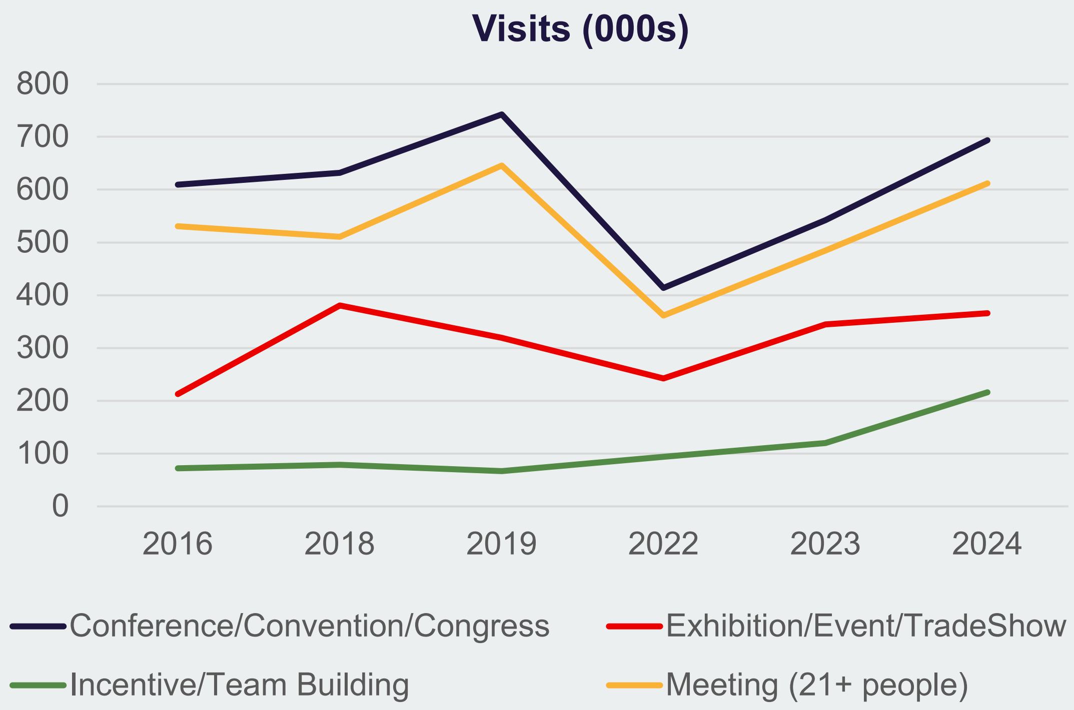
IPS | Incentive inbound visits keep growing in 2024, while exhibition/trade show visits drop

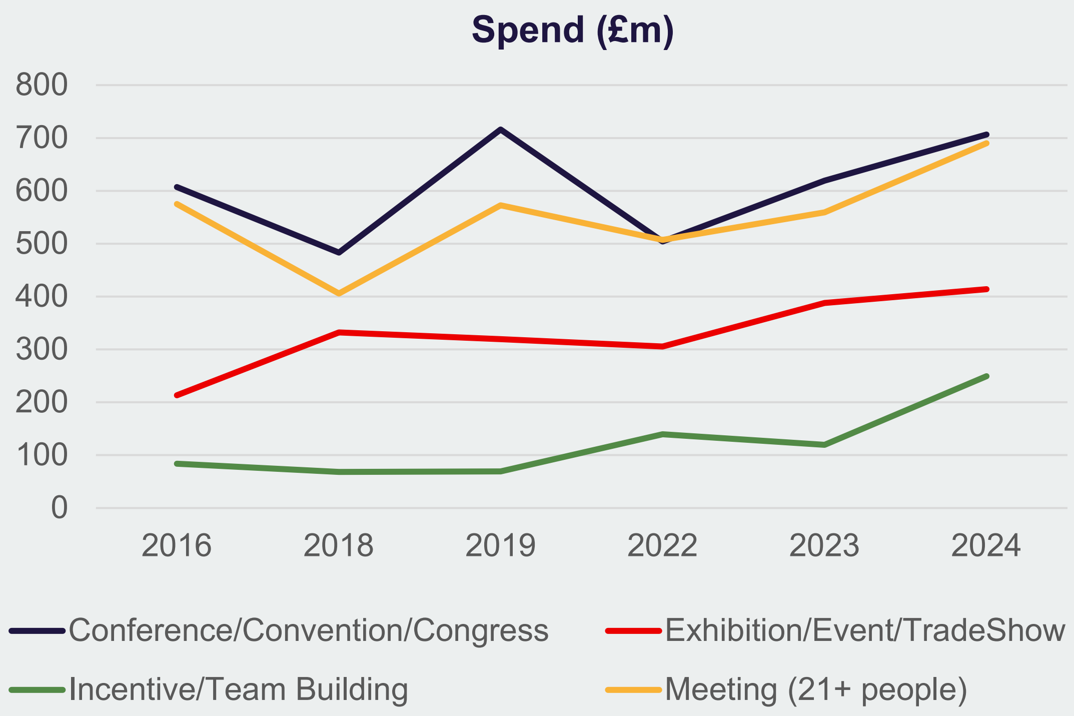
	2019	2022	2023	2024
Total Business Events visits (000)	1,774	1,112	1,491	1,888
• Conference/Convention/Congress	42%	37%	36%	37%
• Meeting (21+ people)	36%	33%	32%	32%
• Exhibition/Event/Trade Show	18%	22%	23%	19%
• Incentive/Team Building	4%	8%	8%	11%

- Post-pandemic, there are fewer 'Large Meetings' and 'Conferences' inbound visits, while 'Incentive / Team Building' inbound visits have grown, taking now 11% share of 'Business Events' inbound visits.

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

IPS | Incentive travel seeing strongest growth vs. 2019 and YoY

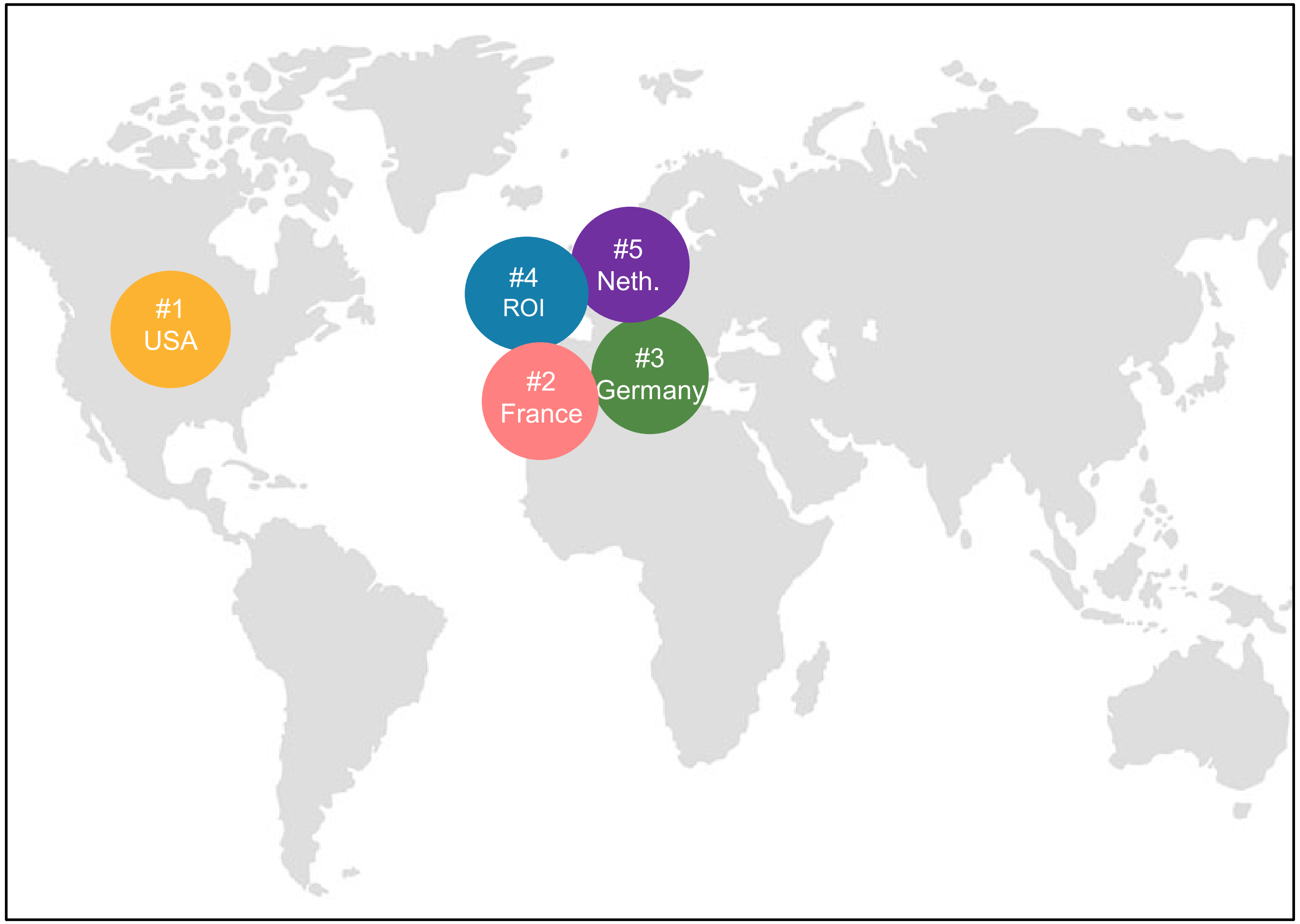




Comparing 2024 metrics with 2019, we can see that the ‘incentive/team building’ category is seeing the strongest recovery (+223% visits, +189% spend in real terms). While this is partially due to a particularly weak 2019 for this purpose, this category also has the strongest year on year growth (+80% visits, +103% spend in real terms). All categories see growth for visits and spend vs. 2023.

Source: International Passenger Survey, ONS. Data is based on provisional estimates under a status of ‘official statistics in development’, which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

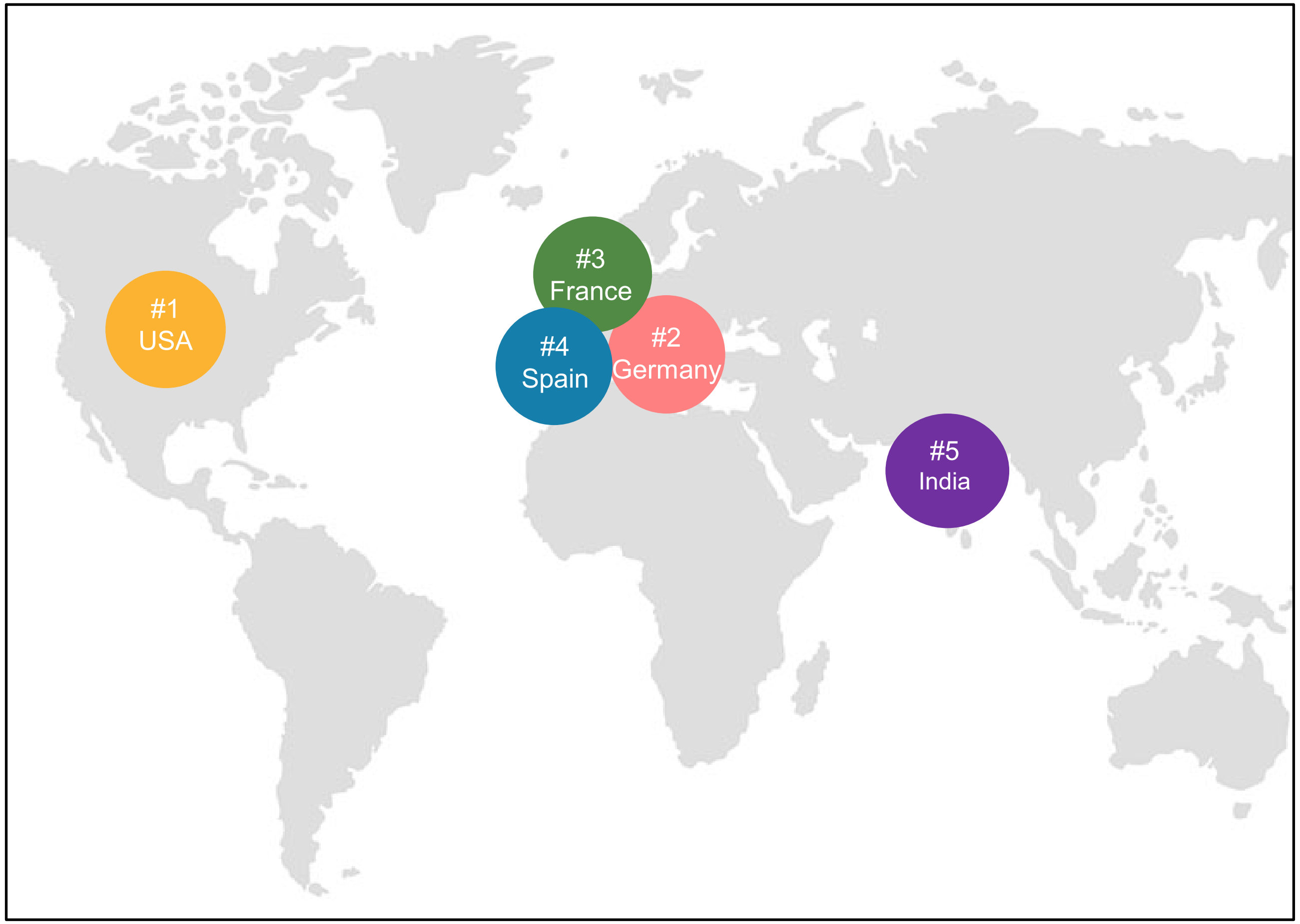
IPS | USA the largest source of Business Events inbound visits



Rank	Market	Visits in 2024
1	USA	341,890
2	France	155,842
3	Germany	148,452
4	Republic of Ireland	137,031
5	Netherlands	118,584
6	Spain	117,749
14	India*	32,320
20	China*	17,120

Source: International Passenger Survey, ONS. ***Sample size below 100, please treat with caution.** Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

IPS | India moves up for Business Events spend

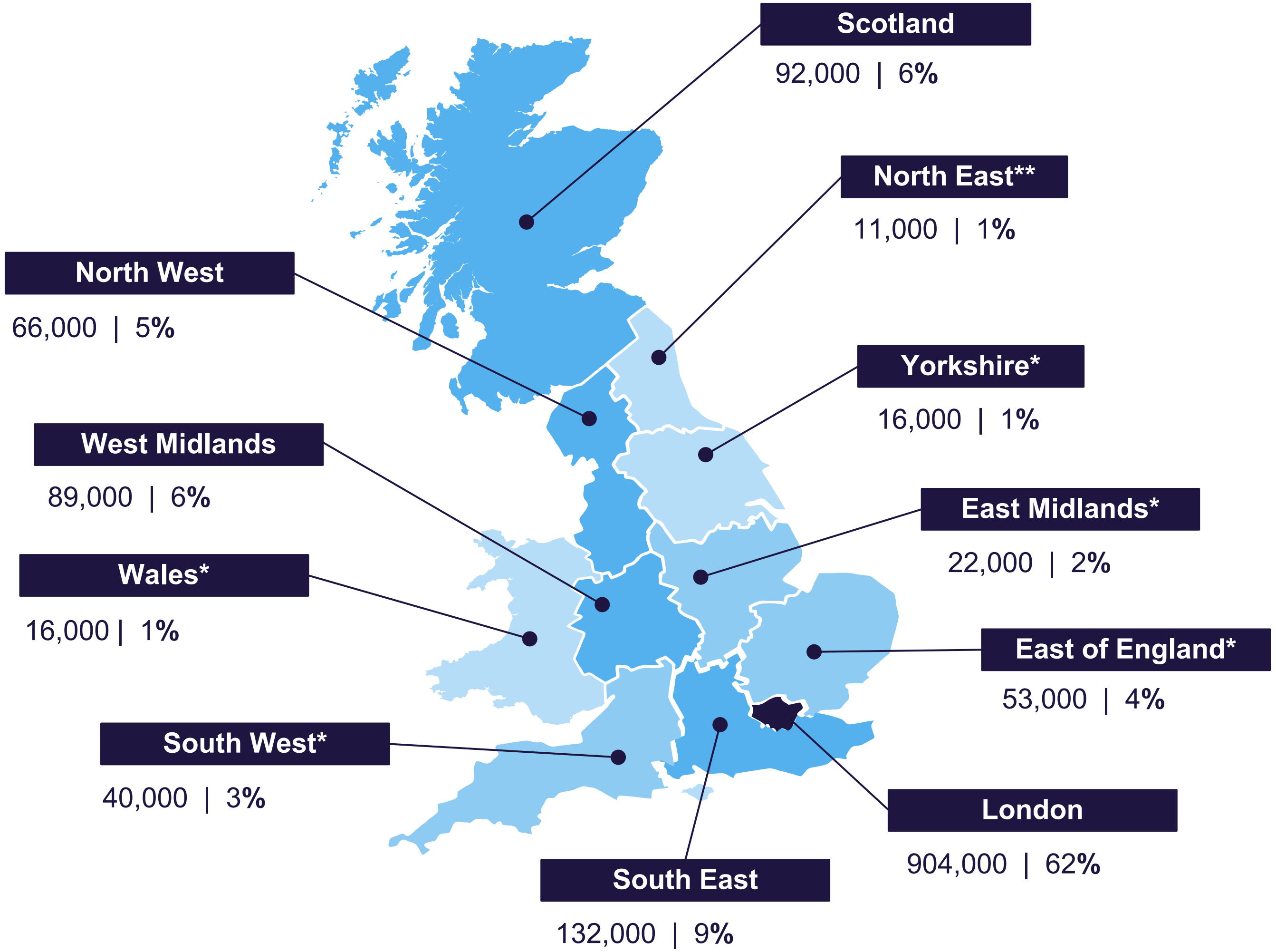


Rank	Market	Spend in 2024
1	USA	£634m
2	Germany	£102m
3	France	£86m
4	Spain	£82m
5	India*	£72m
6	Republic of Ireland	£68m
11	China*	£41m

Source: International Passenger Survey, ONS. ***Sample size below 100, please treat with caution.** **Sample size below 30, may be misleading. Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

VISIT BRITAIN VisitEngland

IPS | London received the majority of Business Events visitors, followed by the South East, Scotland and West Midlands



- Due to limited sample sizes, regional data is based on an annual average across two years (2023 and 2024) to provide an indication of the spread of Business Events inbound visits.
- 62% of Business Events inbound visits were to London in 2023 and 2024, receiving an average of 904,000 visits per year.
- The next most prominent regions were the South East (132,000 visits), Scotland (92,000 visits), and the West Midlands (89,000 visits).

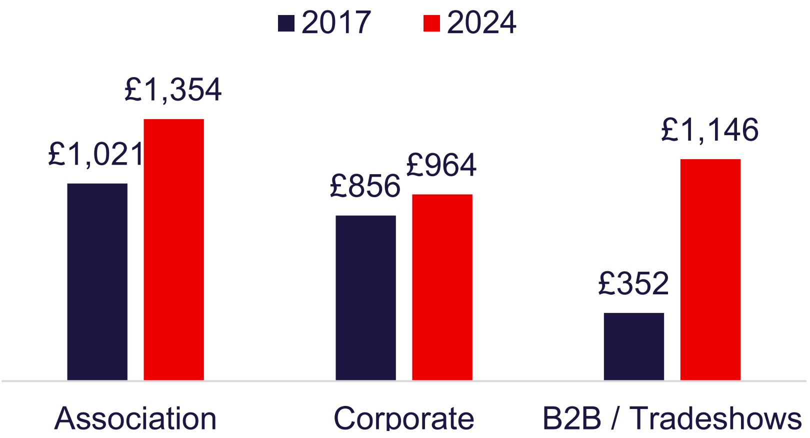
Source: International Passenger Survey, ONS 2023 & 2024. Data based on those who visited one region only in the UK during their stay. ***Sample size below 100, please treat with caution **Sample size below 30, may be misleading.** Data is based on provisional estimates under a status of 'official statistics in development', which are subject to future changes. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years.

VisitBritain Delegate Spend Report

VB Delegate Spend Report | Average trip spend increases 75% since 2017

Origin of delegate	Average spend per trip
UK	£328
Europe (outside UK)	£872
Outside Europe	£1,824
Overall*	**£629**

Average spend per trip by event type
Overseas delegates



Average event duration

Association Events **3.6 days**

Corporate Events **3.1 days**

B2B / Tradeshows **2.6 days**

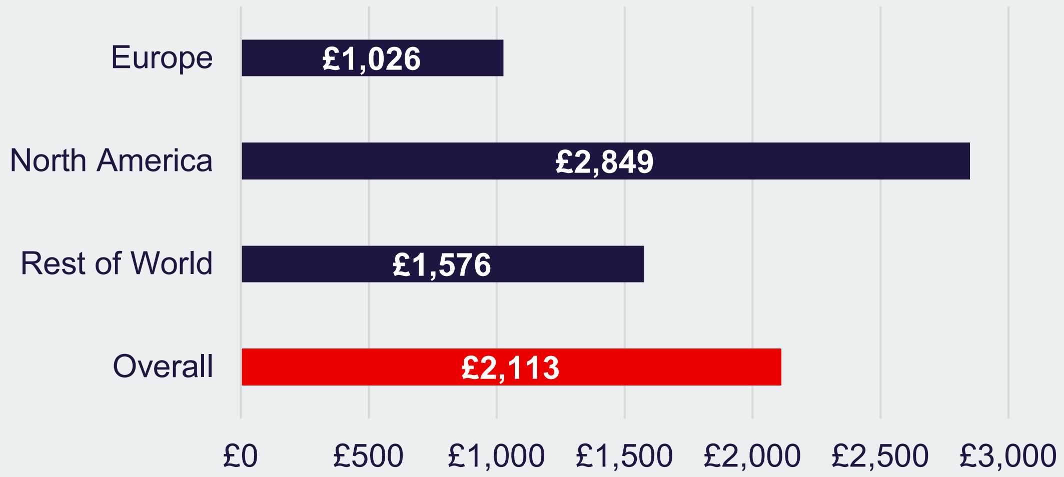
- Average spend per trip has increased significantly since our 2017 study, rising from £359 to £629 in 2024 (excluding registration fees).
- This substantial growth is primarily driven by three factors: 1) More delegates are now staying overnight: 73% in 2024, up from 62% in 2017. 2) The average length of stay for overnight delegates has increased: from 3.0 nights to 4.3 nights. 3) Inflationary YoY increase
- When we examine spend by event type, average trip spend for association events is higher than other event types, predominantly due to length of the events and the diverse origins of the delegates.

Source: VisitBritain Business Events Delegate Spend (2024); *Excluding registration fees

VISIT BRITAIN VisitEngland

VB Delegate Spend Report | Average spend for incentive travel exceeds £2,000 per delegate

Average spend by origin delegate*



* All spend excludes travel to and from Britain, e.g. air fares.

Average spend by region of Britain

** These figures are for the rest of England; no incentive trips were identified in Wales for the study

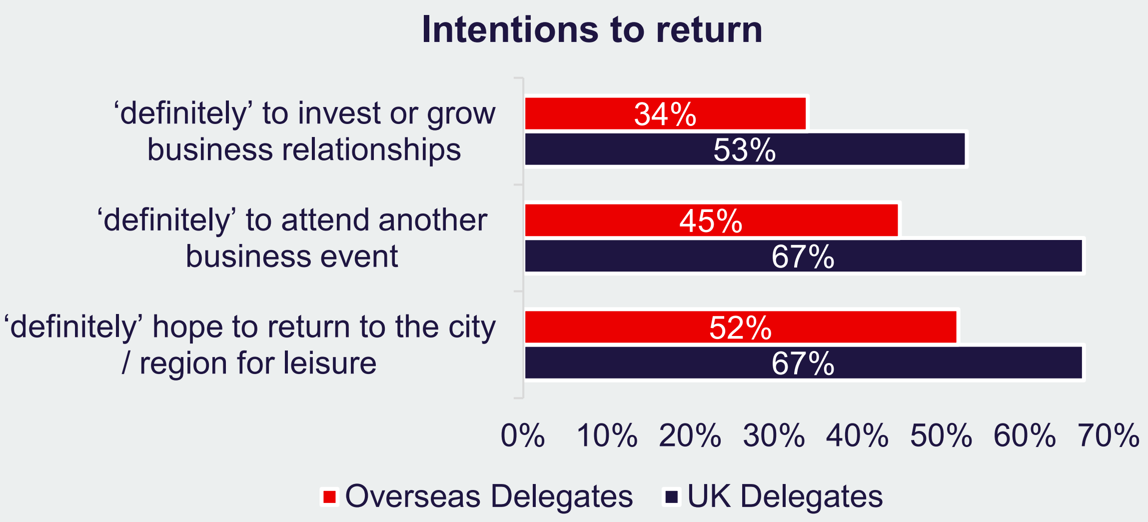
- Incentive trips continue to hold considerable value for the UK economy, with the average spend in the UK exceeding £2,000 per delegate.
- North American incentive delegates on average spend more than any other delegate. This is due to their average stay being 6.3 nights in comparison to 3.1 nights for European delegates.
- Scotland tops spending for incentive travellers at nearly £3,000 per delegate, largely due to the higher-than-average length of stay (5.7 nights) in Scotland. This is also supported by many North American delegates choosing to stay in luxury accommodation throughout the duration.

Source: VisitBritain Business Events Delegate Spend (2024)

VB Delegate Spend Report | Extending a trip increases spend by a factor of 2.5

56% of non-European delegates extend their stay

33% of European delegates extend their stay



- Delegates who extend their trip for leisure and/or business spend £1,760 on average. Without the extension, the same delegates would have spent £714 on average. Therefore, extending a trip increases spend by a factor of 2.5.
- Over half of all non-European delegates and approximately a third of all European delegates choose to extend their stay.
- Intention to return is high among all delegates for leisure or business purposes.

Source: VisitBritain Business Events Delegate Spend (2024)

VB Delegate Spend Report | Sustainable travel choices made by over half of all UK delegates

Over half (55%) of overseas delegates travel by air directly to event city, while 37% fly into another UK city then taking public transportation (train, bus, coach) to reach the end destination.

Over half (53%) of UK delegates travel to the event city by train, compared with 26% who utilise their own vehicle.

On the day of the event, 55% of delegates choose to walk to the venue. This figure includes 71% of overseas delegates and 47% of UK delegates.

- Delegates to events in Scotland and London are much more likely to fly to the event city (78% and 70% respectively).
- About one in five (19%) overseas delegates travelling to London take the train/Eurostar.
- For overseas delegates, a common theme raised across the survey was the convenience of direct flights with many stating their preference for this.

Source: VisitBritain Business Events Delegate Spend (2024)

Sector performance | Key insights

- 2024 saw **sustained growth** in Business Events performance worldwide, with the UK leading the Western European recovery in hotel group room nights at the beginning of 2025. The new year activity has reduced compared to 2024 citing global uncertainties.

- The Event industry is highly valuable to the UK at **£61.65bn**, with business events the largest contributor at **£33.6bn**.

- ICCA saw the volume of global meetings at **76% of pre-COVID levels**, but slightly fewer meetings took place in 2024 compared to 2023 worldwide.

- According to IPS recent statistics, inbound business event visits to the UK is showing **growth vs 2023** and vs. pre pandemic. Business event visits remain the largest spenders of all inbound visit types, and accounts for a growing volume of overall business travel. Incentive/team building' category saw the most year-on-year growth.

- The **US and Western Europe** remain the core markets for business event visits.

- From recent VisitBritain research, **delegate spend** has risen significantly for business events since 2017, particularly with international delegates. Stay extensions are common amongst international delegates. Importantly intention to return is strong including for **business purposes**.

Cardiff, Wales ©Shutterstock/Darryl Sleath

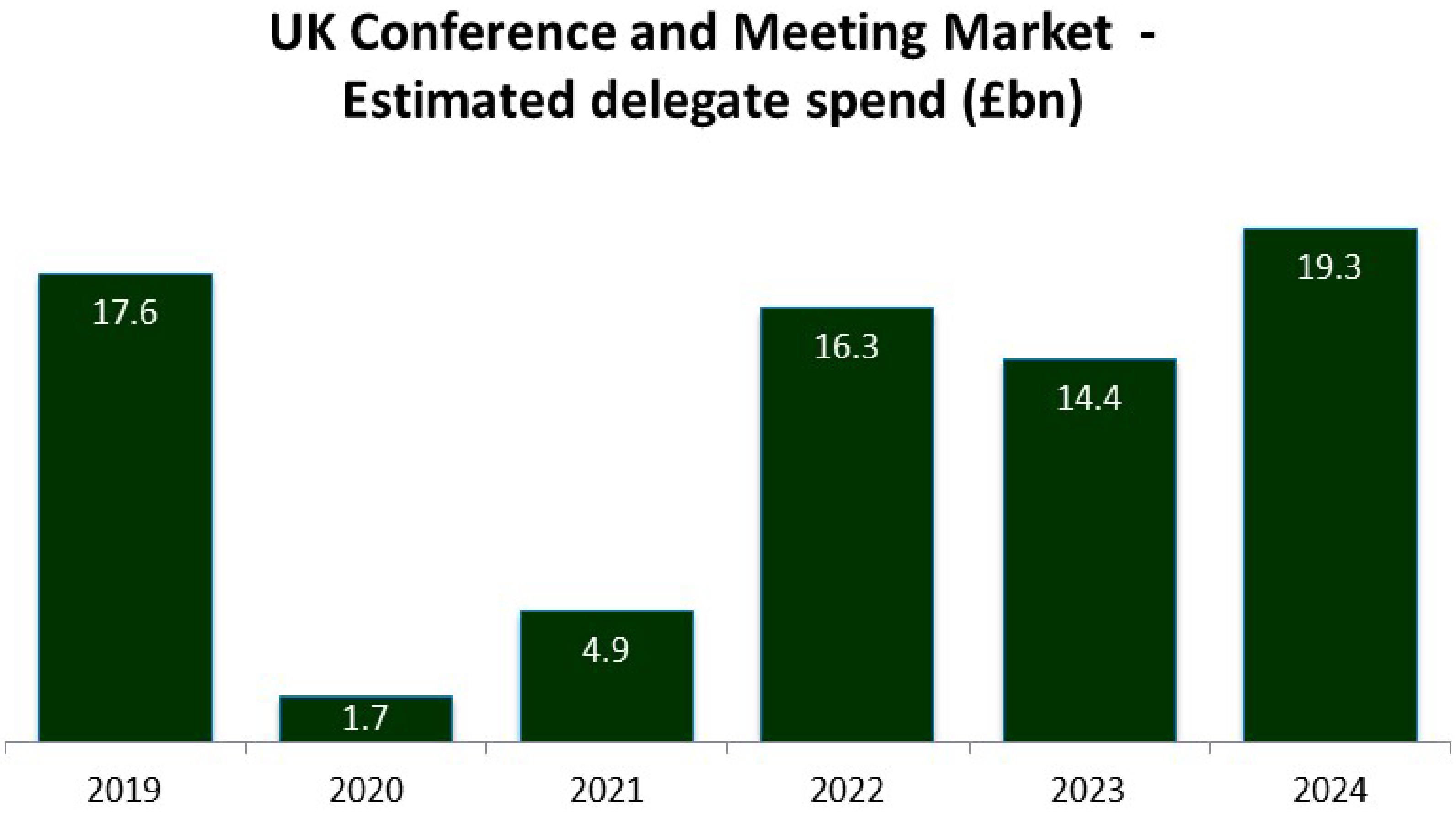
UKCAMS 2025
Richard Smith

UK CONFERENCE AND MEETING DIMENSIONS AND TRENDS

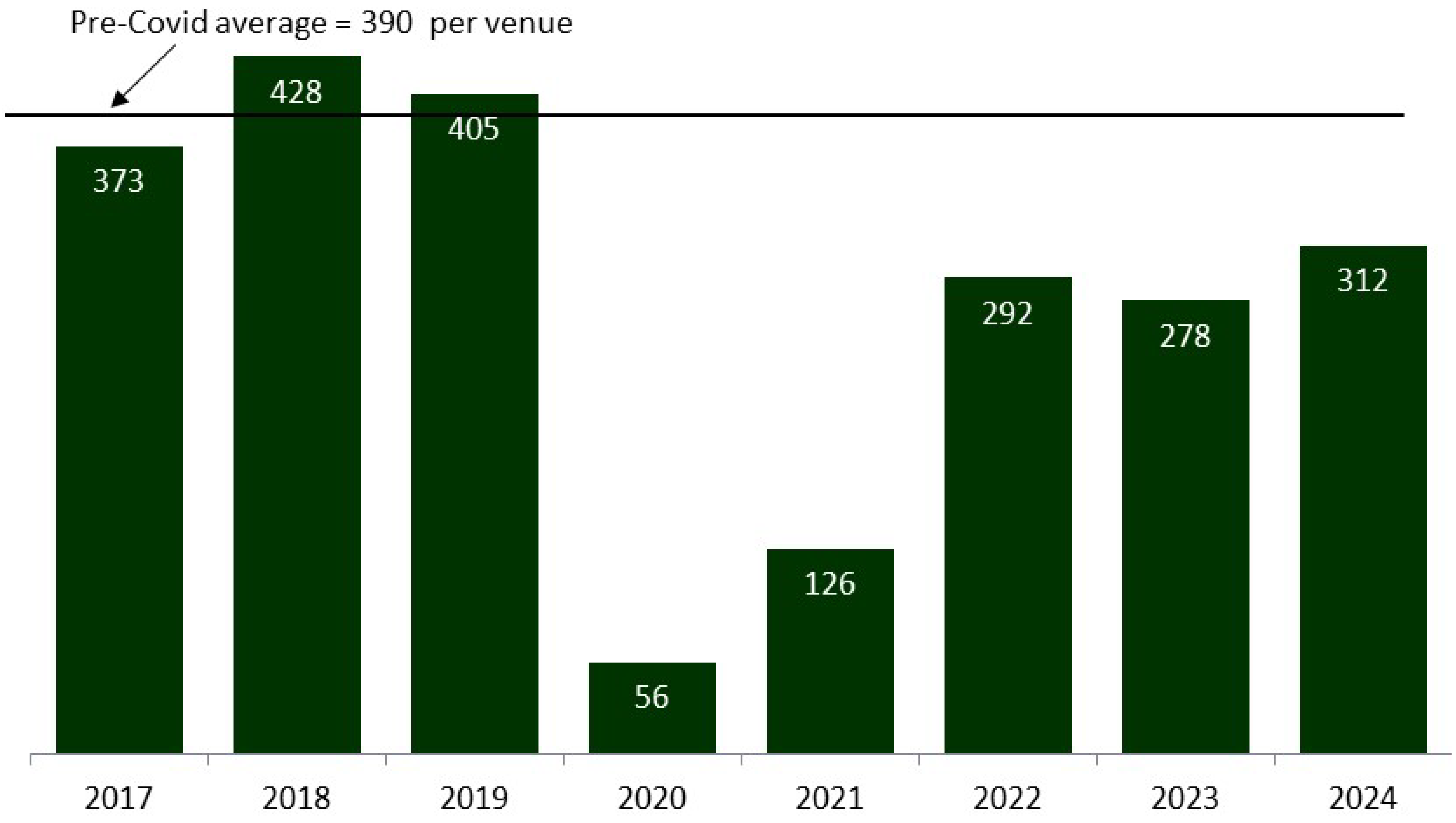
INTRODUCTION TO UKCAMS

- What is a conference or meeting?
  - An out-of-office conference, meeting or other business event of at least four hours' duration involving a minimum of 10 people".
  - Covers conventions, congresses, conferences, meetings, training courses, sales briefings, seminars, product launches, roadshows etc.
- Venue based
- Long term trend

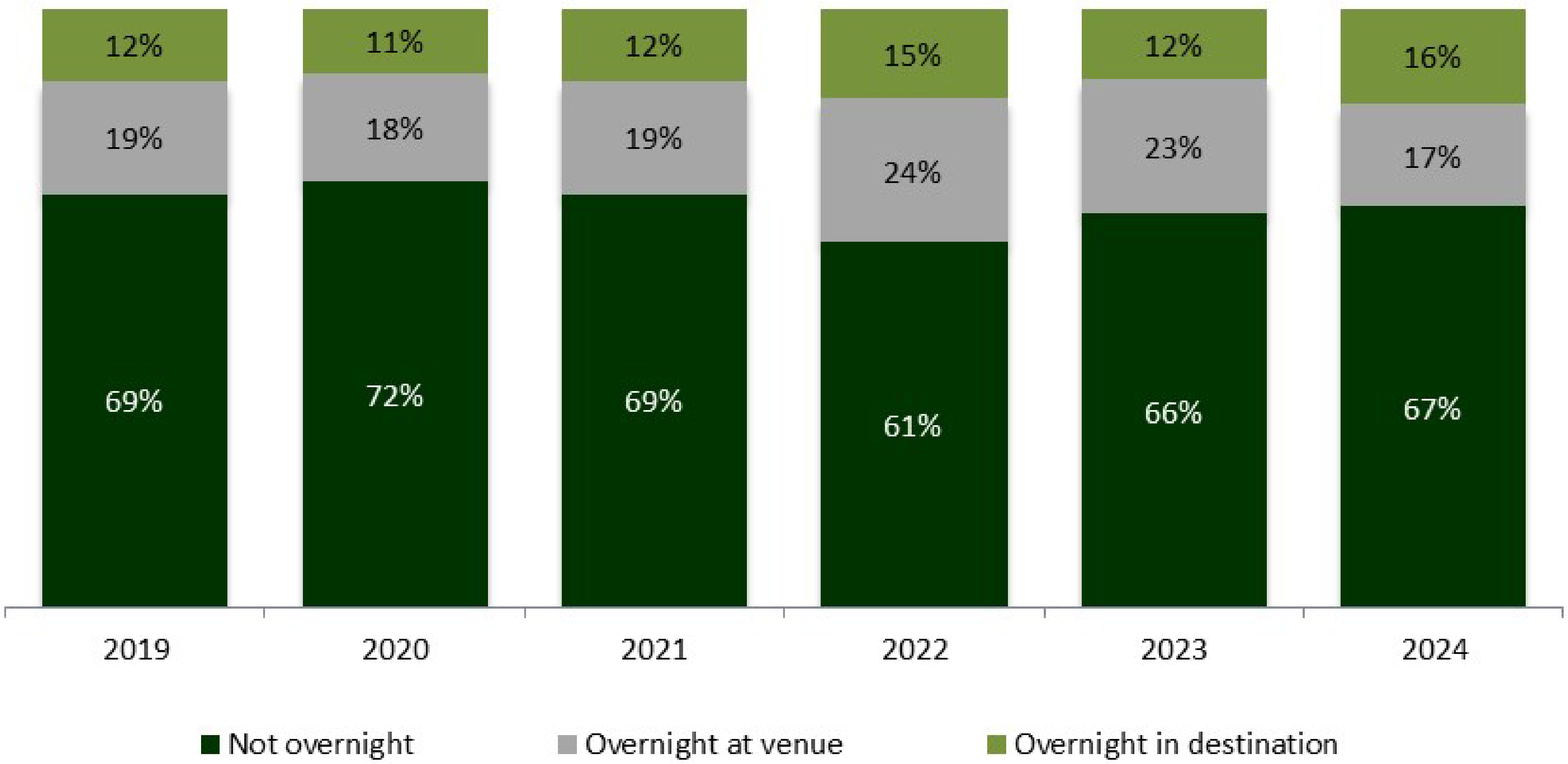
MARKET VALUE



CONFERENCE/MEETING VOLUME

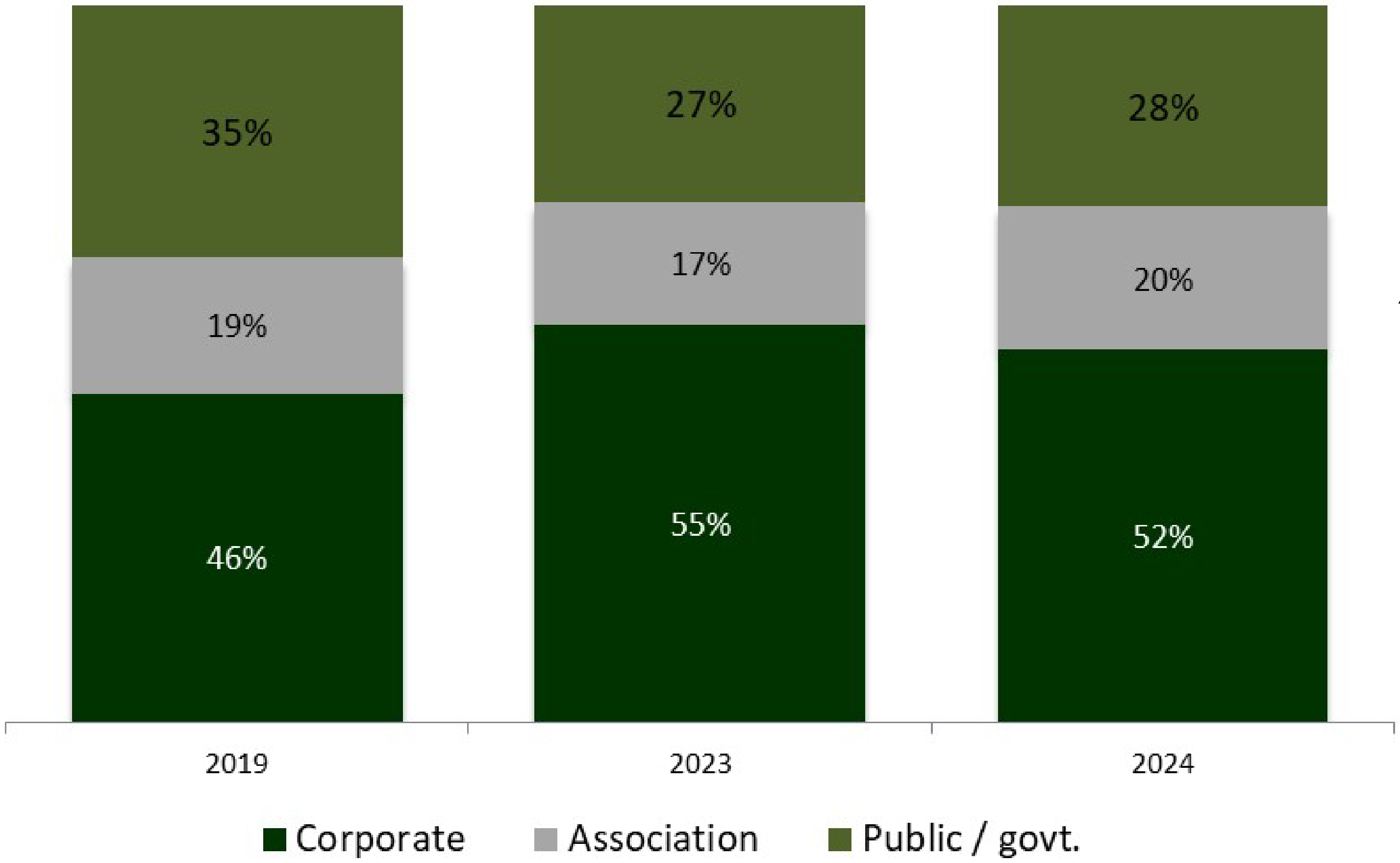


DAY VS OVERNIGHT



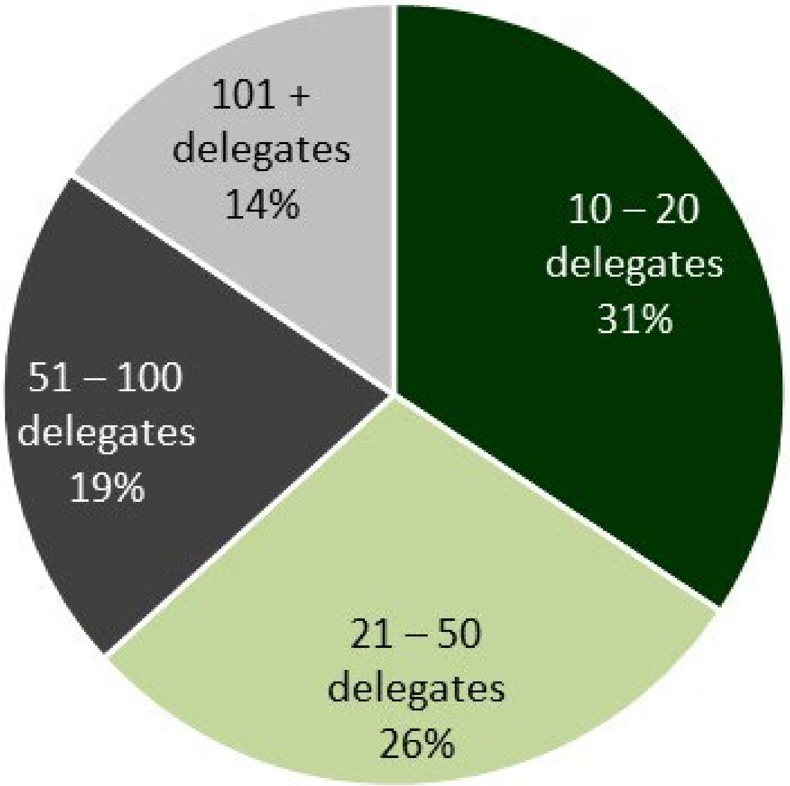
Shift from residential events.

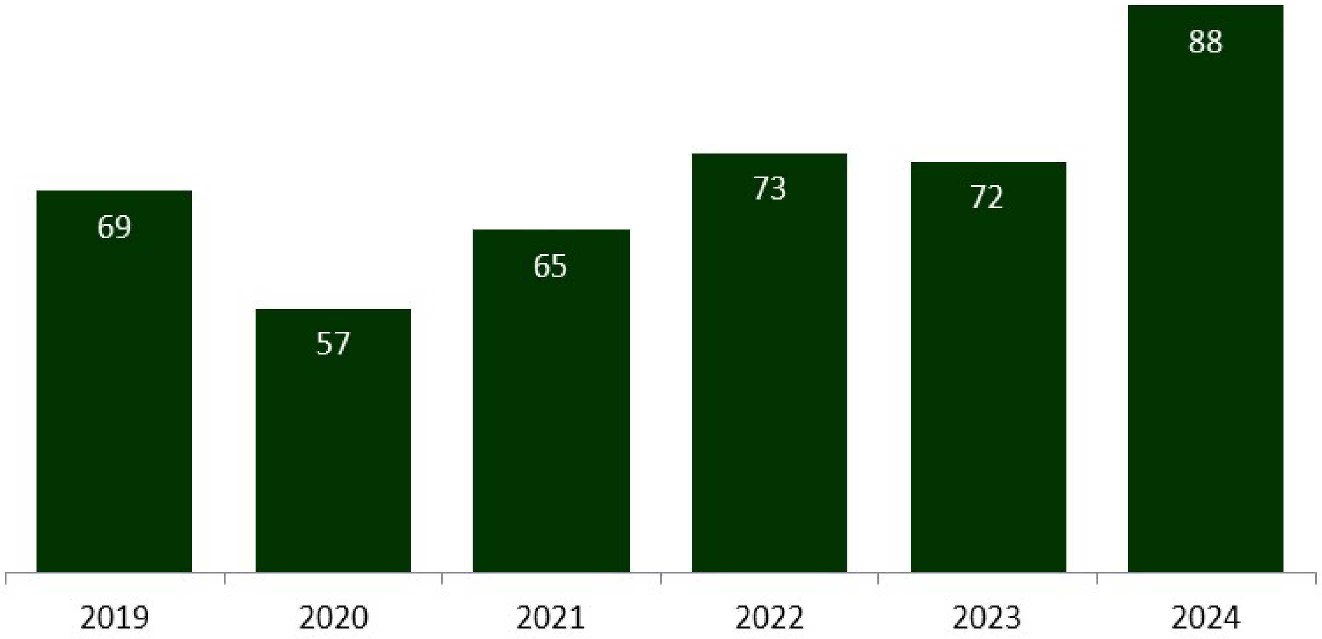
EVENT ORGANISATION



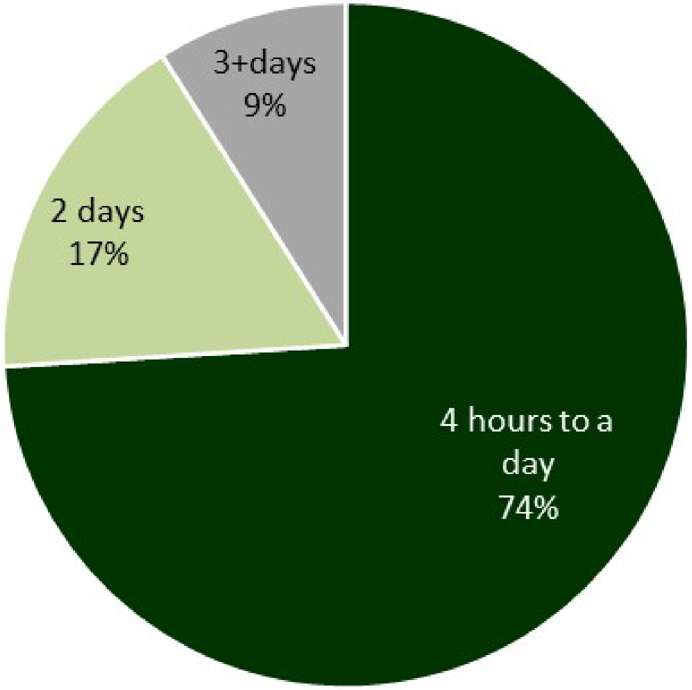
Slight increase in association events.

CONFERENCE SIZE

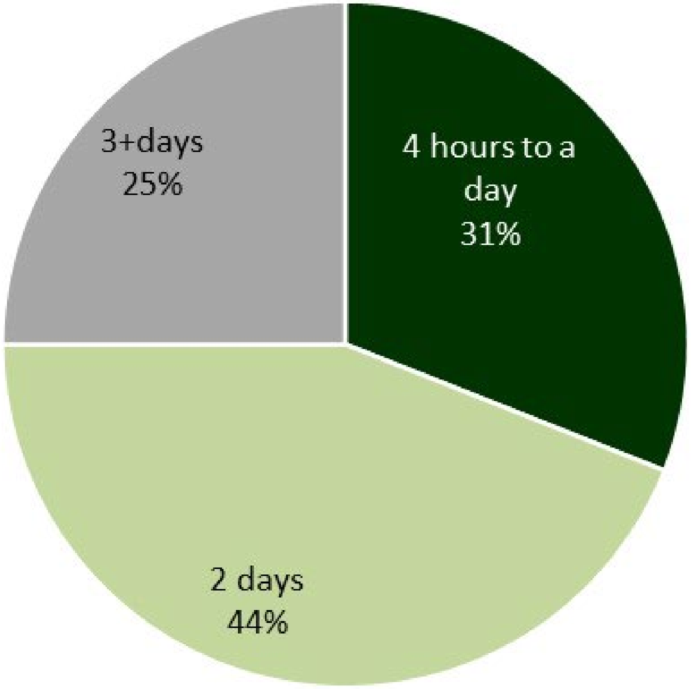




CONFERENCE DURATION

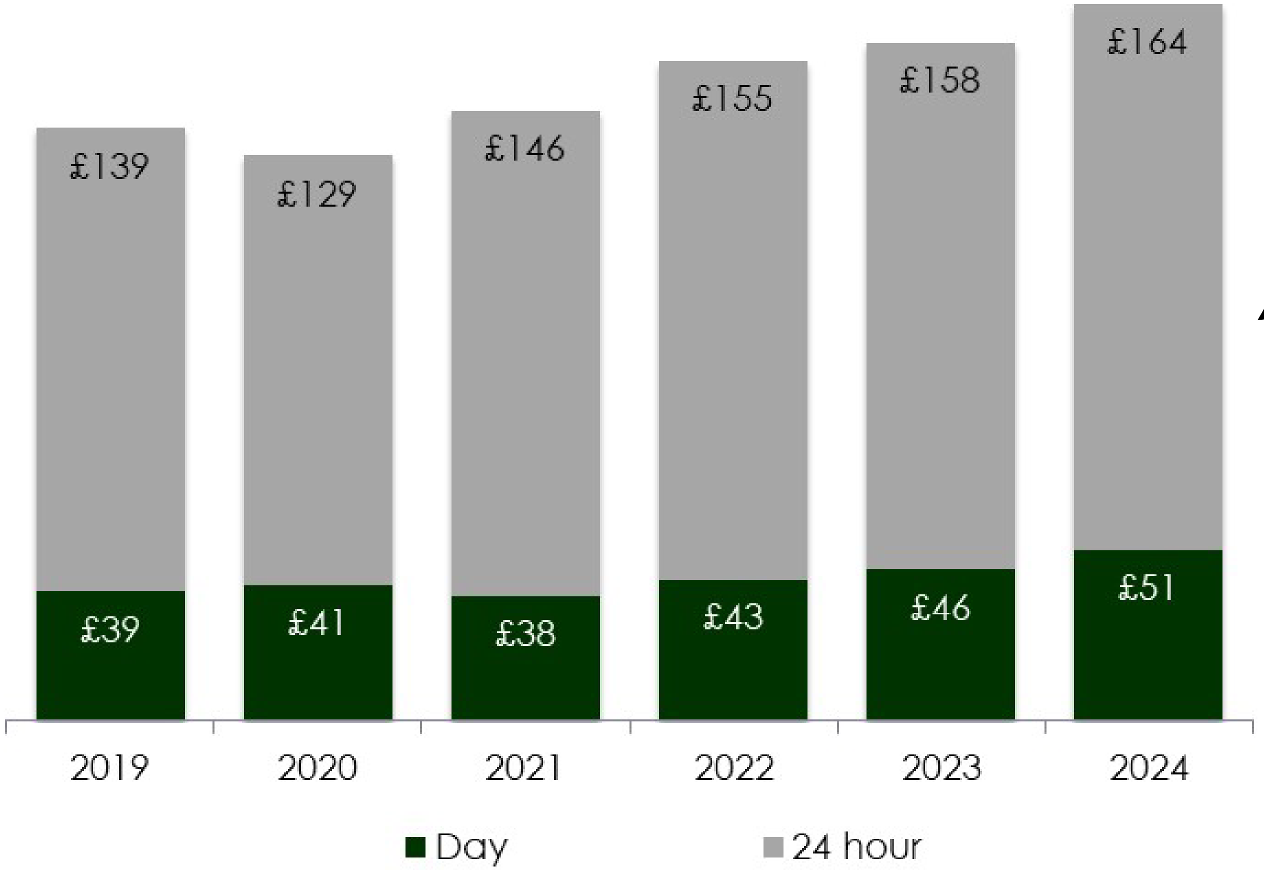


Non-Residential



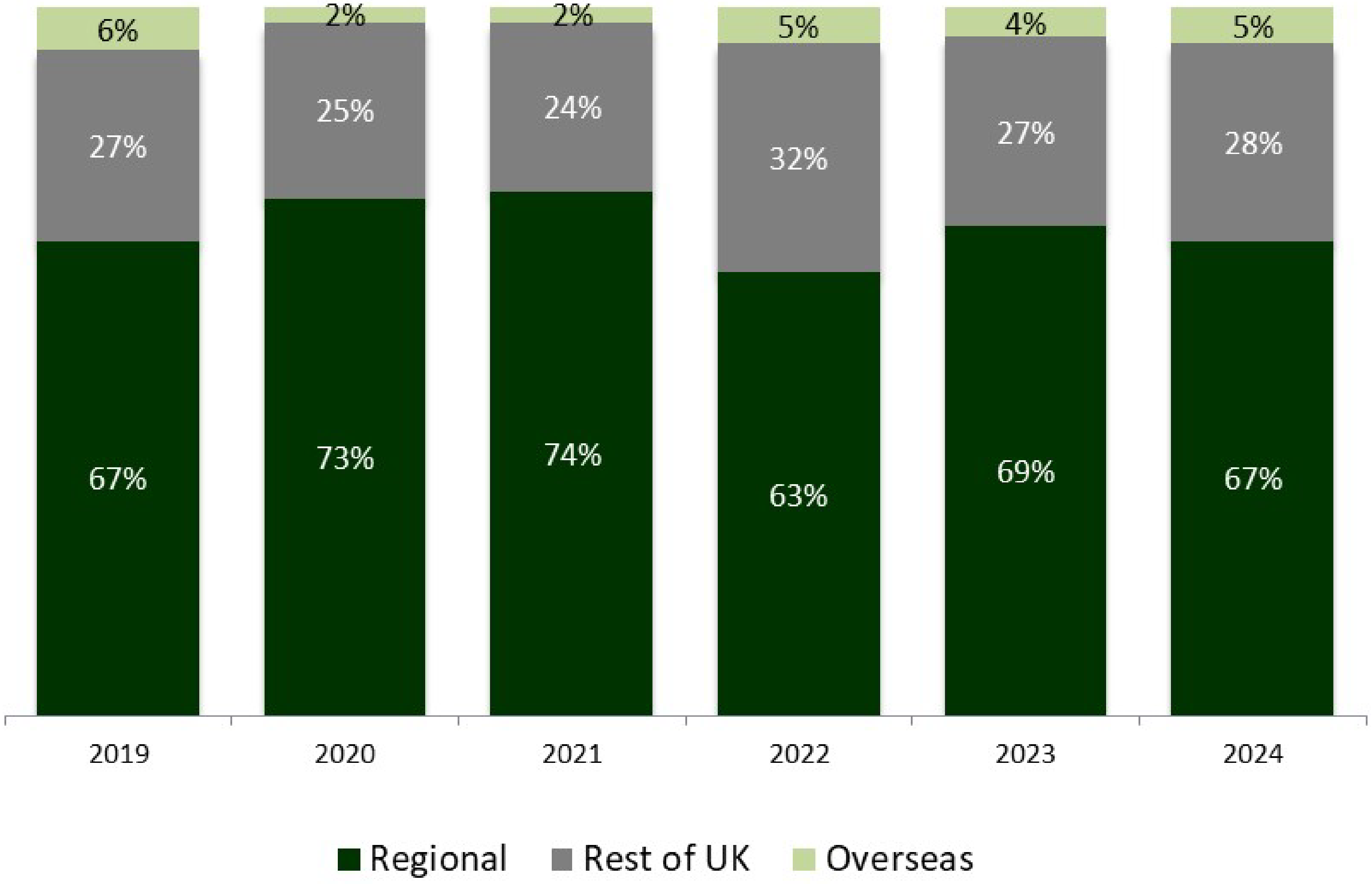
Residential

ACHIEVED RATES

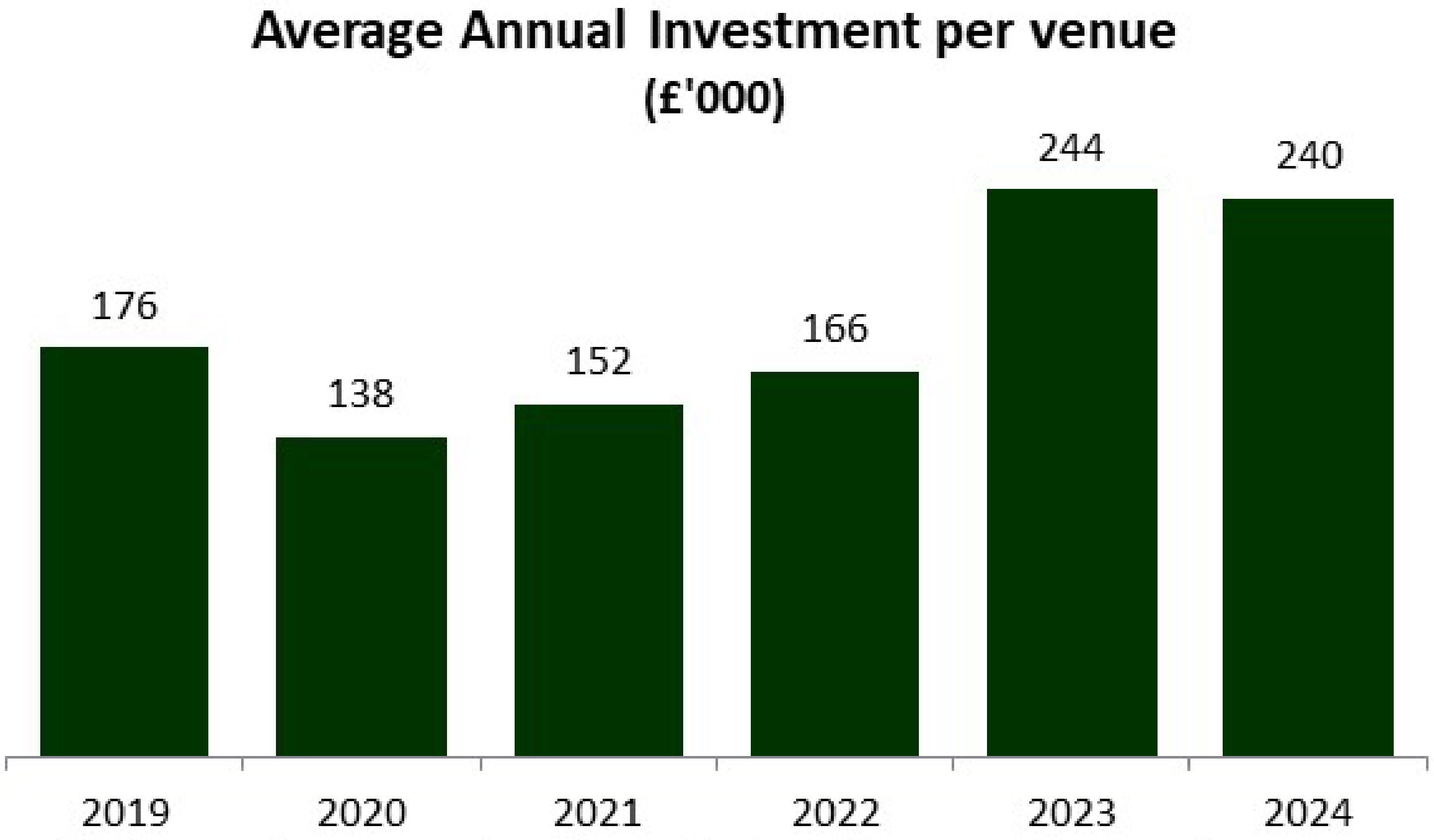


Largely inflationary increase.

BUSINESS ORIGIN - REGIONAL

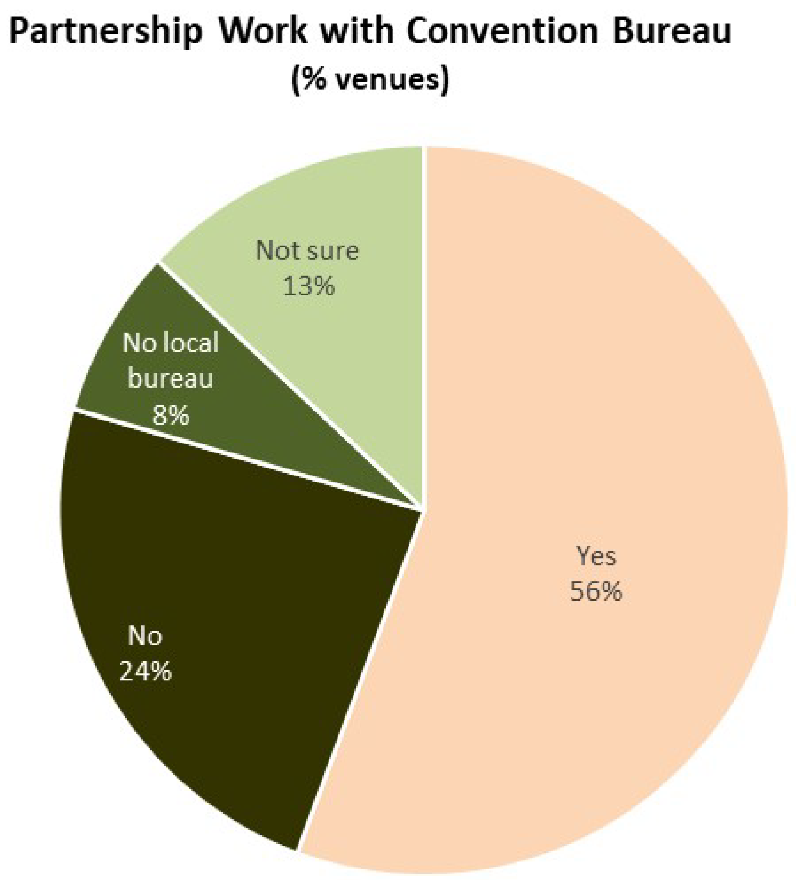


INVESTMENT



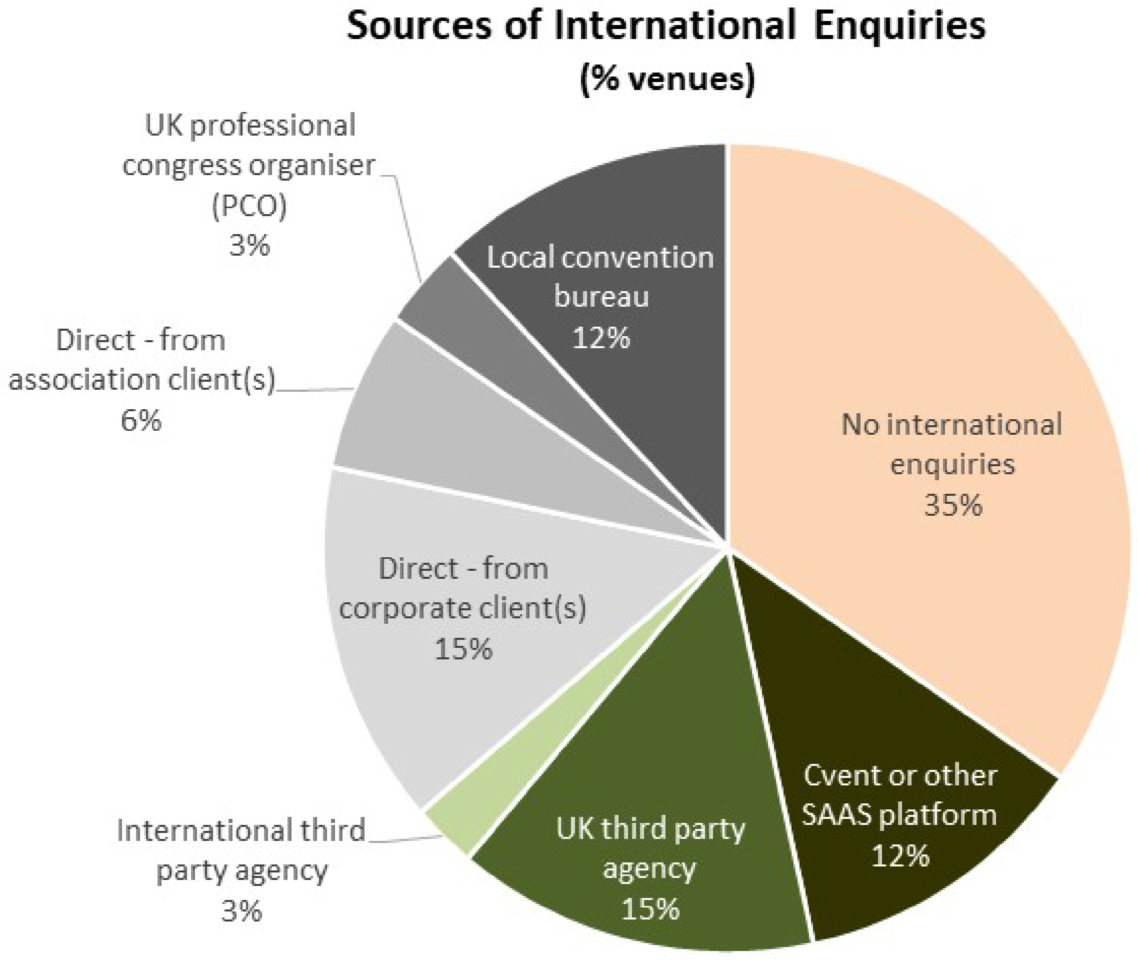
NB. Average investment based on mid-point of investment categories.

LOCAL CONFERENCE BUREAU



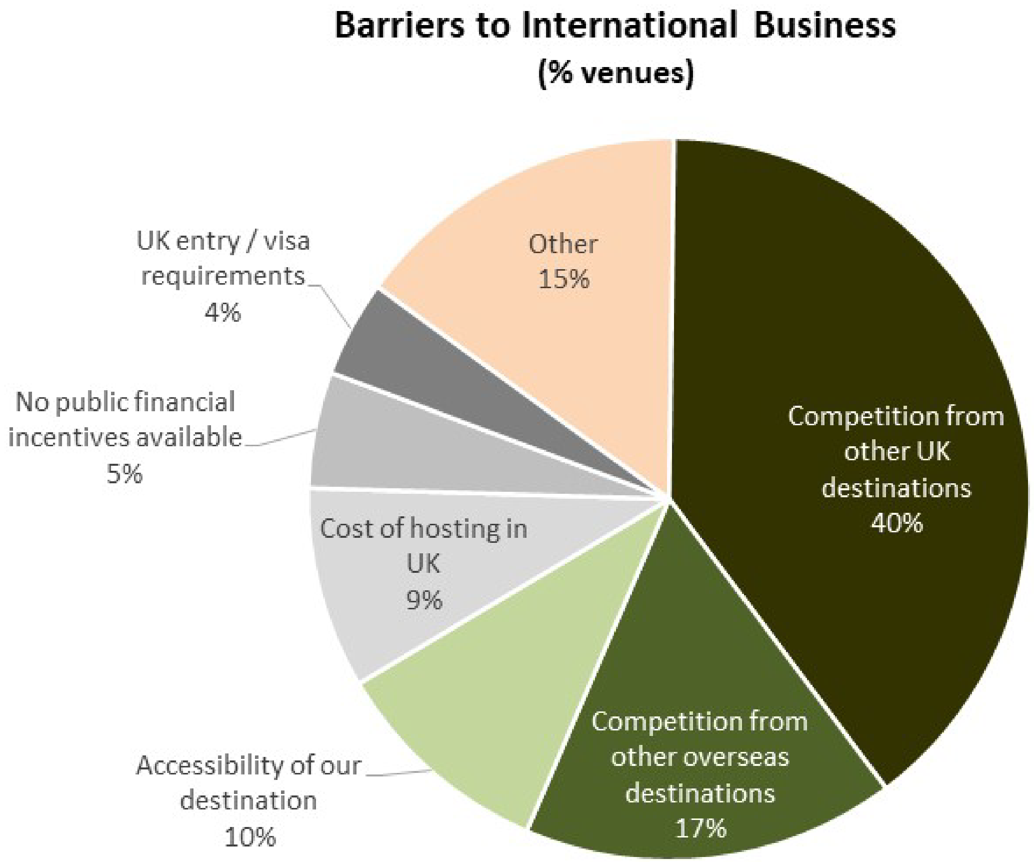
Question: Do you work in partnership with your conference/convention bureau? n=*239*

INTERNATIONAL ENQUIRIES



Question: What is the primary source of your international enquiries? *n=234*

INTERNATIONAL ENQUIRIES



Question: What has been the biggest barrier to securing international contracts? *n=210*

SOME KEY POINTS

- Overall spend above the pre-Covid level
- Number of conferences up on 2023 but volume of events remains below the pre-Covid level
- Event size up
- Slight shift to destination and association events
- Some indicators largely unchanged from 2023 – duration, rates and business origin
- Investment levels remain high.

Comfort break

VISIT BRITAIN
VisitEngland

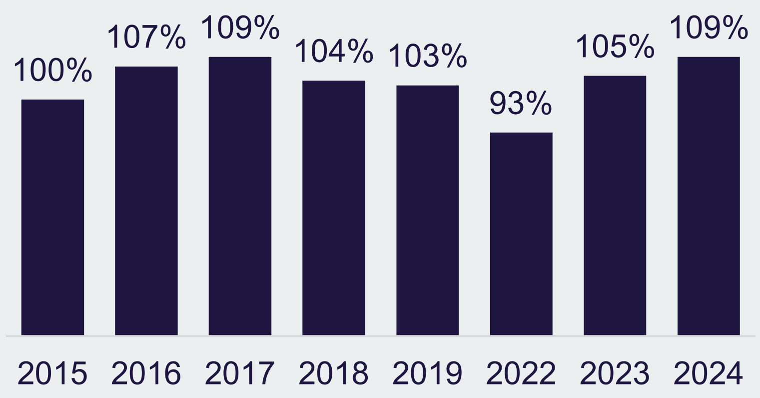
SASIE
Size and Scale Index for Exhibitions

VISIT BRITAIN

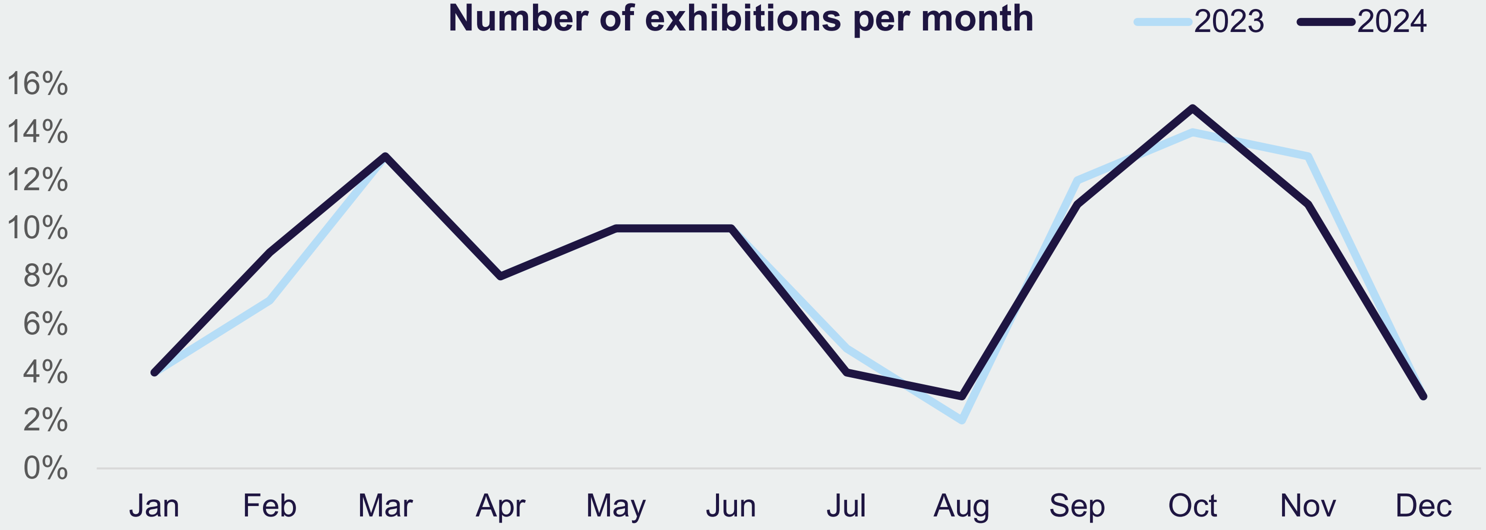
VisitEngland

SASIE | Over 1,100 exhibitions in 2024, the highest since 2017

Number of exhibitions per year (indexed vs. 2015)*



Number of exhibitions per month



- In 2024, there were an estimated 1,145 exhibitions at the UK's main exhibition venues.
- The number of exhibitions in 2024 showed a strong post-COVID recovery; reaching their highest level since 2017.
- 2024 saw a stronger start than 2023 in Q1, then both years followed a similar trajectory during the remainder of the year. The busiest months in 2024 were March, September, October, and November, accounting for 50% of all exhibitions.

Source: SASIE Size and Scale Index for Exhibitions 2024 *Trend analysis carried out on a smaller sample of venues where comparable year on year data exists

SASIE | Conferences and trade exhibitions surge to 2015 levels

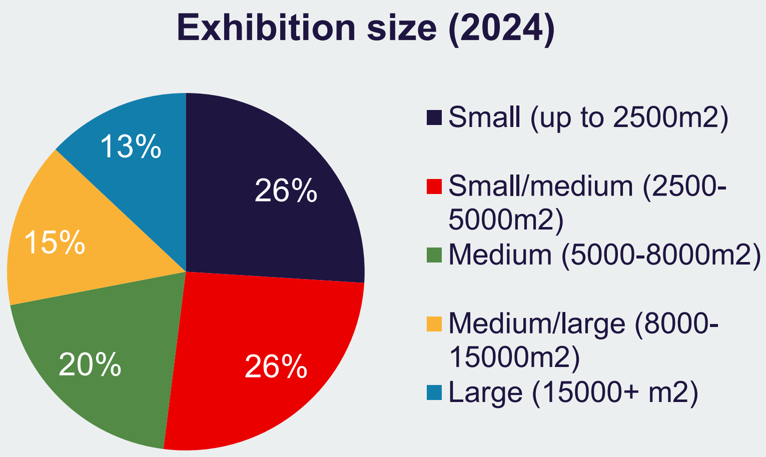
Number of exhibitions recovery in 2024 vs. 2019*

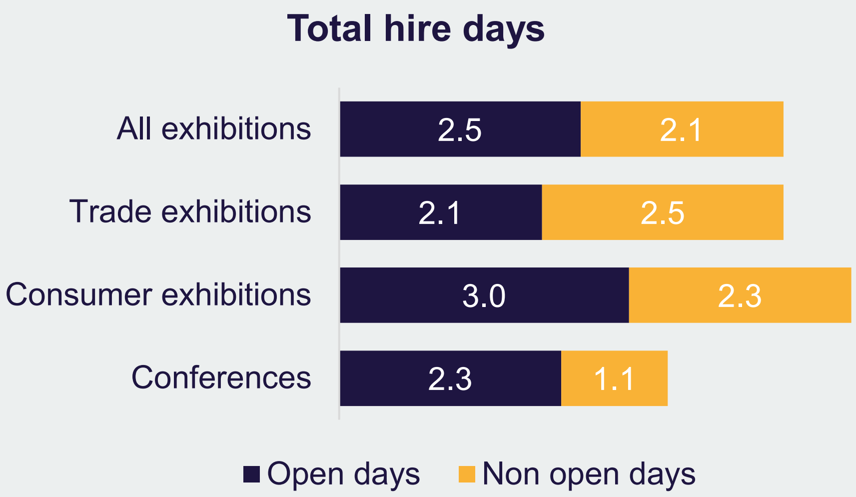
Trade	**104%**
Consumer	**91%**
Conference**	**179%**

- In 2024, trade exhibitions dominated the market at 42%, with consumer exhibitions (33%) and conferences (25%) making up the remainder.
- This year saw conferences surge to their highest levels since 2015. Trade exhibitions also experienced a strong bounce-back, up 6.5% from 2023 and reaching their own 2015 peak. Meanwhile, consumer exhibitions remained at 2023 levels, still below their 2019 pre-pandemic performance.

Source: SASIE Size and Scale Index for Exhibitions 2024 *Trend analysis carried out on a smaller sample of venues where comparable year on year data exists
**Conferences included in this study are large with a min 500sqm of exhibition space (small hotel conferences are not included)

SASIE | Event characteristics in 2024





- There were an estimated 7.2 million visits to exhibitions at the UK's main venues in 2024, with a median attendance of 2,400 visitors. Total visitor numbers were up, driven by the growth in the number of trade exhibitions and conferences, but with a reduced average attendance.
- In 2024, over half of exhibitions were small or small/medium size, and the median gross square footage of 4,700m2. Total exhibition space sold was up year on year, as well as average exhibitions size. However, these figures remain below pre-Covid averages.
- On average exhibitions occupied a venue for 4.6 days, with exhibitions open for an average of 2.1 - slightly lower than 2023.

Source: SASIE Size and Scale Index for Exhibitions 2024. Trend analysis carried out on a smaller sample of venues where comparable year on year data exists

SASIE | Leisure dominates consumer exhibitions, while healthcare & pharma lead trade and conferences

Industry Sector	Average All Exhibitions	Trade Exhibitions	Consumer Exhibitions	Conferences
Leisure, hobbies & recreation	18.7%	2.9%	52.0%	1.1%
Medicine, healthcare & pharma	13.3%	13.7%	2.6%	26.8%
Financial, banking & retail	8.0%	6.9%	7.1%	10.7%
Education	7.6%	6.5%	8.8%	8.2%
Technology	6.5%	8.3%	0.3%	11.7%
Aerospace, automotive & transport	6.0%	9.6%	3.3%	3.2%
Lifestyle, home & wedding	5.7%	5.1%	9.9%	1.1%
B2B services, conferences	5.2%	6.7%	0.5%	8.9%
Building & construction	4.9%	8.7%	2.8%	1.1%
Food & Beverage	4.4%	6.0%	3.7%	2.5%
Manufacturing, engineering & science	4.2%	7.4%	0.8%	3.6%

Source: SASIE Size and Scale Index for Exhibitions 2024. Trend analysis carried out on a smaller sample of venues where comparable year on year data exists

ICCA

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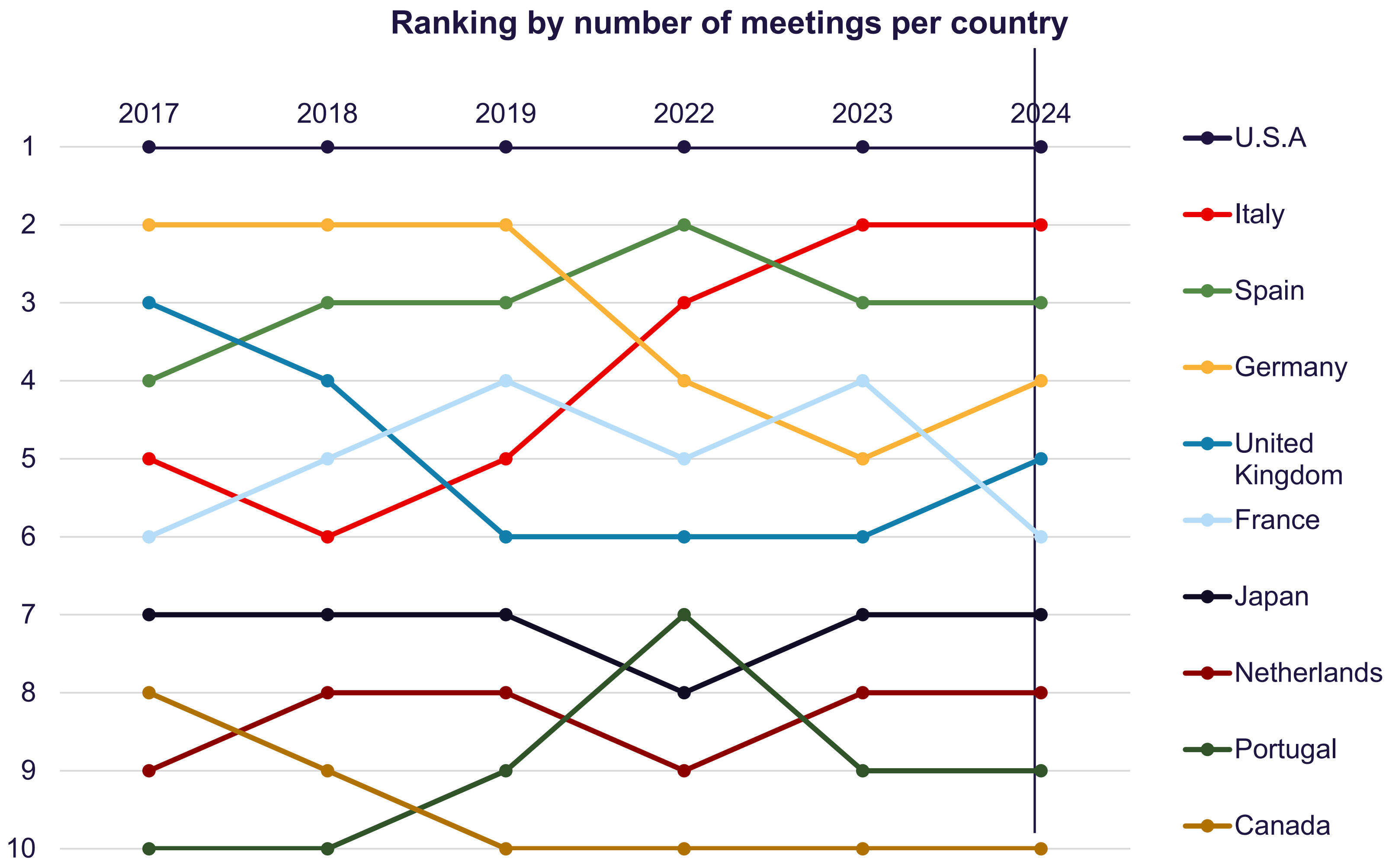
ICCA | UK goes up to 5th rank worldwide

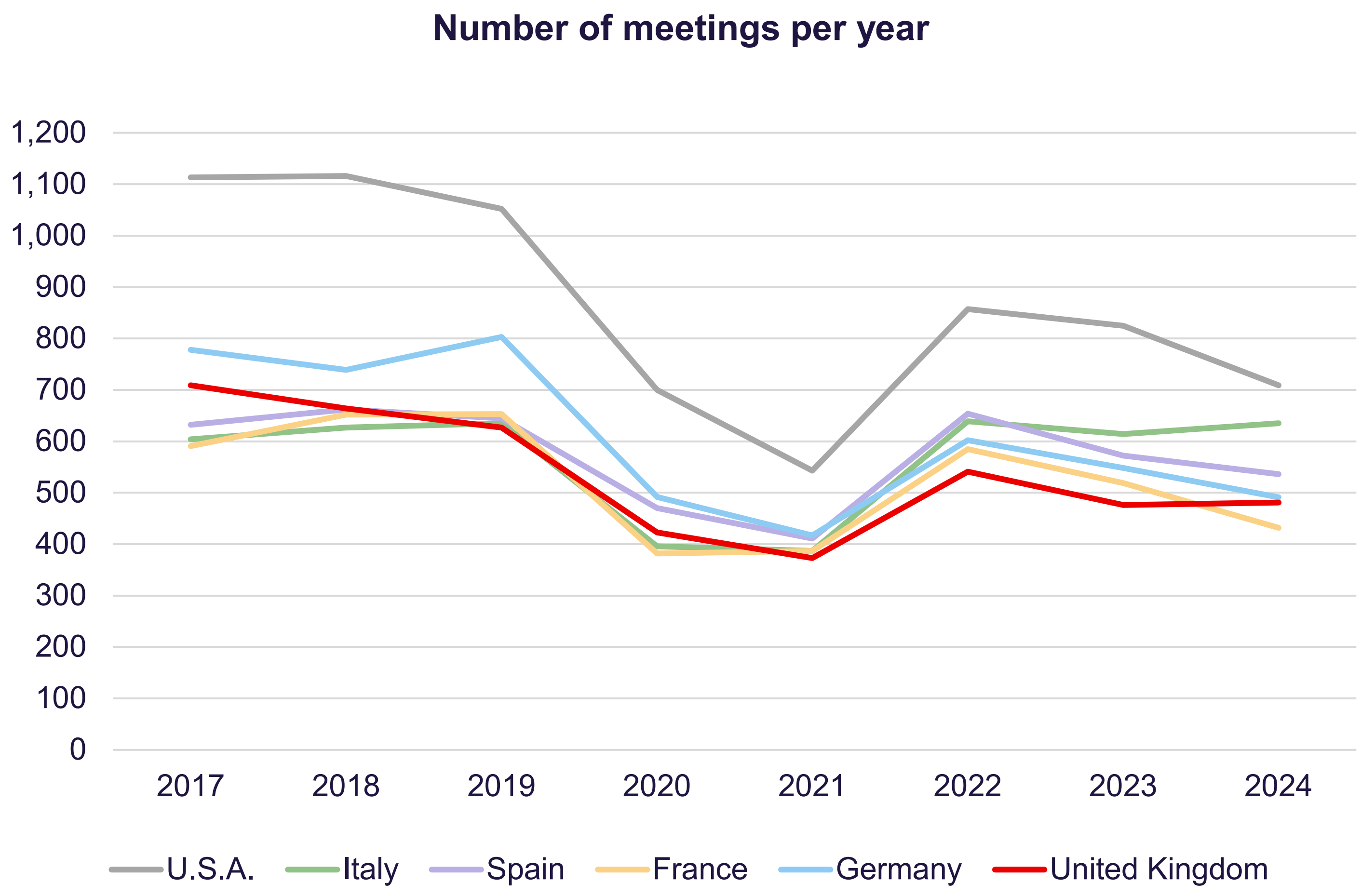


- In 2024, the UK hosted 481 meetings, ranking 5th worldwide. This saw our rank go up for the first time since 2019, however still lower than what seen from 2015 to 2018.
- Within the top 20 countries, China and Brazil gained the most ranks year on year (+7 and +5 respectively). In contrast, Australia lost the most ranks (-4).

Source: ICCA Business Analytics Statistics Report 2024

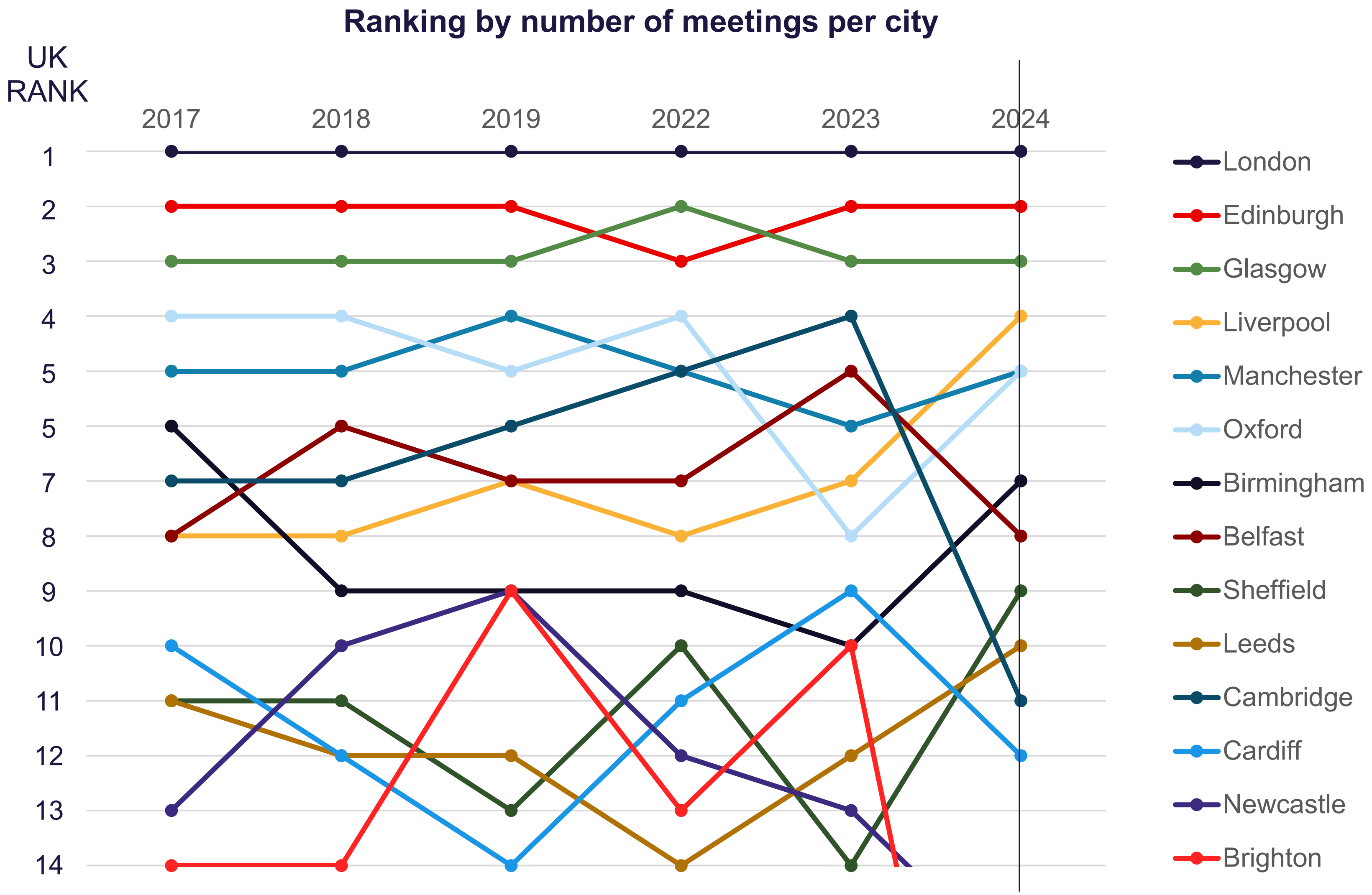
ICCA | UK has recovered 77% of pre-COVID meetings whilst Italy returns to 2019 levels

- In 2024, the UK's meeting recovery rate reached 77% of its 2019 levels. This outperforms Germany (61% recovery), France (66%), and the USA (67%).
- Spain and Italy demonstrate the strongest recovery among key competitors, with Spain at 83% and Italy having returned to 100% of its 2019 meeting volume.
- Compared to 2023, the UK and Italy have experienced a minor increase in the number of meetings held, while all other listed competitors have seen slight declines.



Source: ICCA Business Analytics Statistics Report 2024

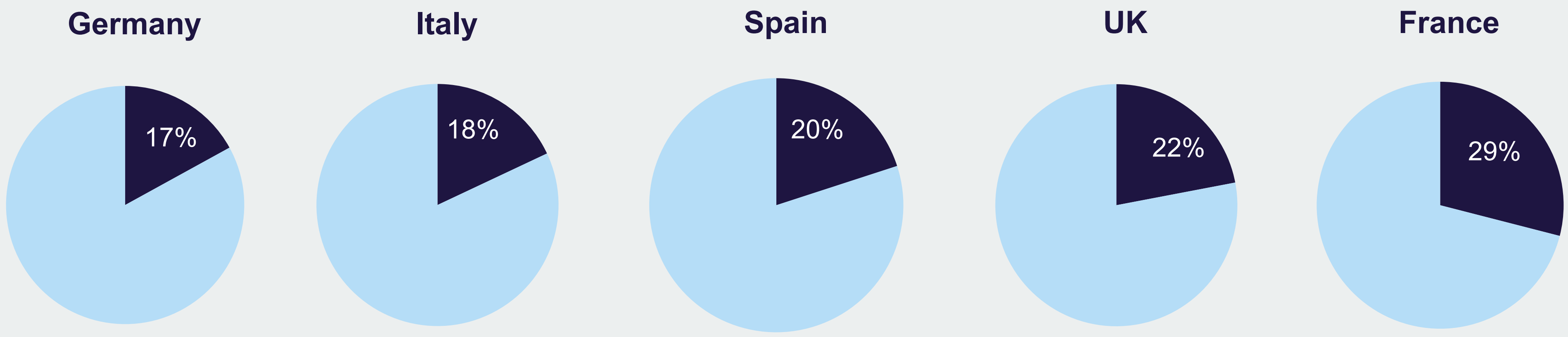
ICCA | Top UK cities similar post-COVID, with number of meetings exceeding 2019 for some



Source: ICCA Business Analytics Statistics Report 2024

- When comparing 2019 and 2024 rankings, the top ranked UK cities have remained largely the same, with London, Edinburgh, and Glasgow leading.
- Meanwhile, Liverpool has surpassed its pre-COVID figures while Sheffield, Birmingham, Leeds and Oxford have seen increases versus post-pandemic years.

ICCA | 1 in 5 association events hosted in London

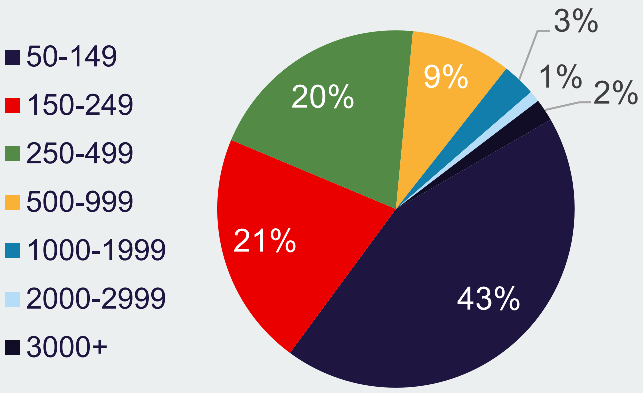


- In 2024, the capital city's share of the UK's events was slightly above the average across the competitor set (22% vs. 21% average). Within the competitor set, France displayed the most reliance on its capital city, holding 29% of the country's events.
- It's important to note that Glasgow and Edinburgh combined account for a significant 19% share within the UK, with Belfast adding 4%. This suggests that London's share may be significantly greater when considering event share specifically within England.

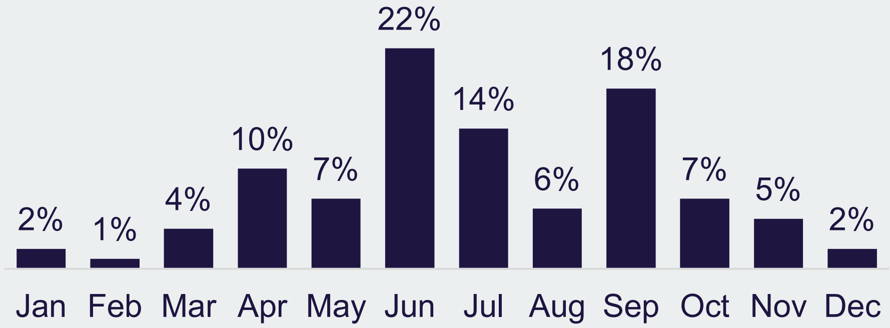
Source: ICCA Business Analytics Statistics Report 2024

ICCA | UK meeting characteristics in 2024

Participant numbers

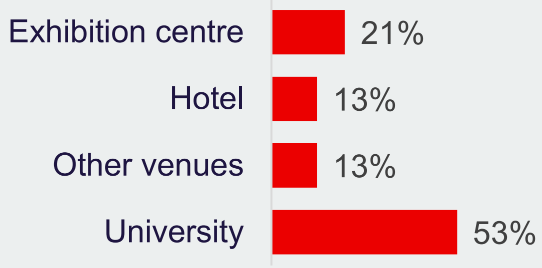


Meetings per month



3.6 days — Average meeting length

Venue types*



- In 2024, 43% of meetings in the UK had 50-149 attendees.
- They were most likely to take place in June, September and July.
- On average, meetings duration was 3.6 days, with universities being the most popular venues.

Source: ICCA Business Analytics Statistics Report 2024 *These figures are calculated only on international association meetings, stored in the ICCA database, that specify their venue used.

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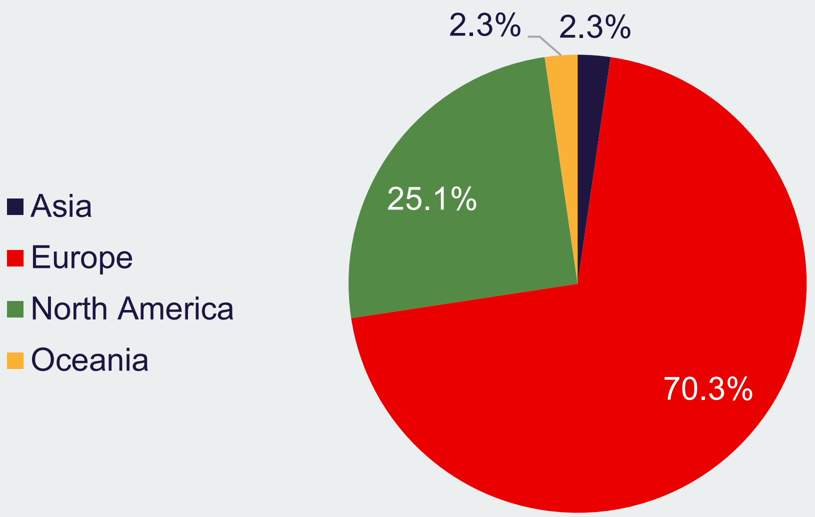
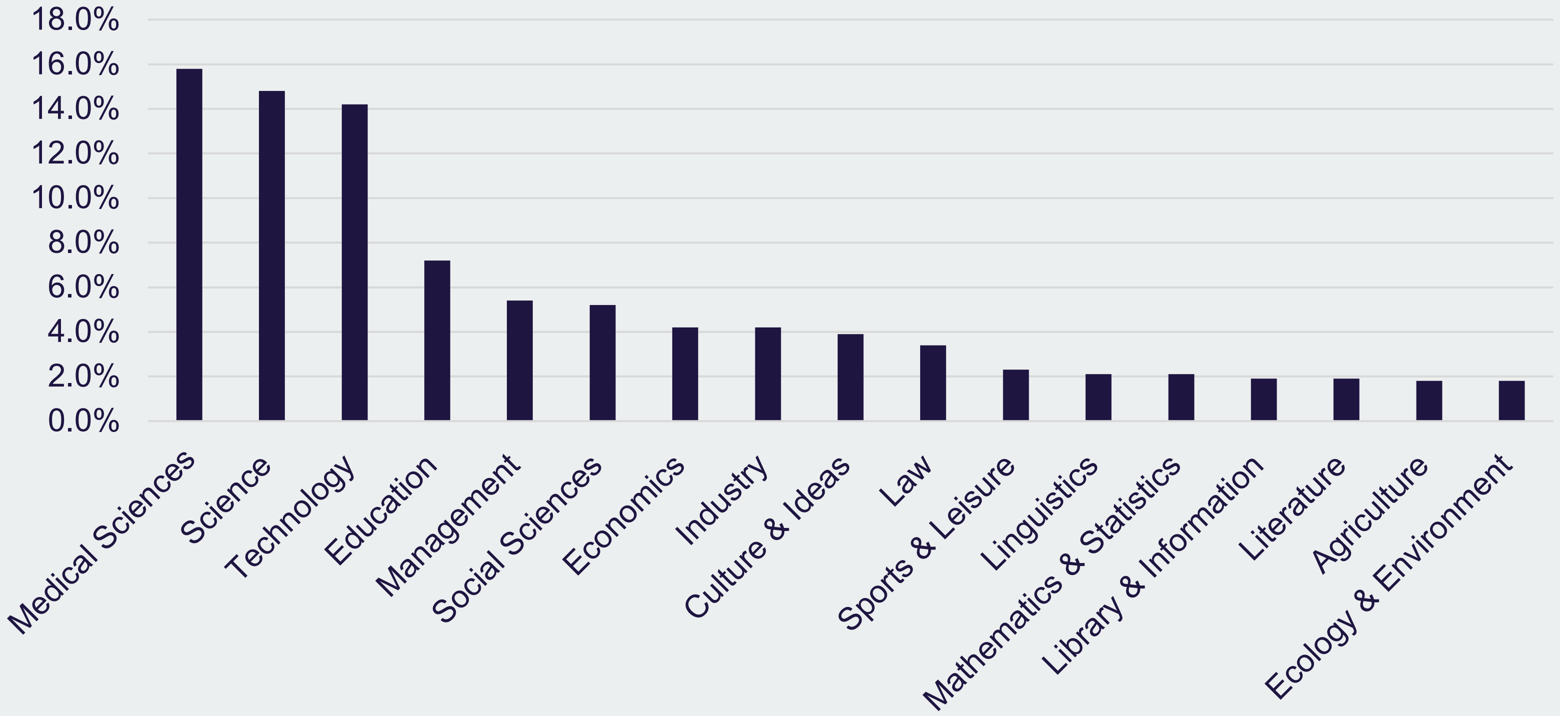
ICCA | UK meeting characteristics in 2024

Where organisations are based



Subject Matters



- In 2024, the vast majority of organizations booking meetings in the UK were based in Europe, followed by North America.
- The most common sectors associated with meetings were the medical sciences (15.8%), science (14.8%), and technology (14.2%) and education (7.2%).

Source: ICCA Business Analytics Statistics Report 2024

Cvent

Cvent | London tops most desirable meeting destinations in Europe

Rank	City
1	London, UK
2	Barcelona, Spain
3	Madrid, Spain
4	Amsterdam, Neth
5	Lisbon, Portugal
6	Paris, France
7	Berlin, Germany
8	Rome, Italy
9	Prague, Czech Republic
10	Dublin, Ireland
11	Antalya, Turkey
11	Munich, Germany
12	Athens, Greece
13	Vienna, Austria

Rank	City
14	Frankfurt, Germany
15	Milan, Italy
16	Brussels, Belgium
17	Copenhagen, Denmark
18	Budapest, Hungary
19	The Hague, Netherlands
20	Warsaw, Poland
21	Bodrum, Turkey
21	Birmingham, UK
22	Manchester, UK
23	Hamburg, Germany
24	Kemer, Turkey
24	Stockholm, Sweden
25	Zurich, Switzerland

- A combination of the number of room nights booked, number of RFPs and awarded value for meetings booked on the Cvent Supplier Network reveals London ranked 1st for meeting destinations in Europe, with Birmingham ranked 21st and Manchester 22nd.
- The top destination in North America was Orlando, within Asia Pacific Singapore, and in MEA it was Dubai.

Source: Cvent Top Meeting Destinations and Hotels report 2025

Sector performance | Key insights

- **Trade shows, exhibitions, conferences with an expo** continue to be a **vital part** of the business events ecosystem here in the UK with year-on-year growth. The UK is home to many leading B2B and publisher organisers to leverage.
- Turning to **international association meetings**, the UK **went up to 5th rank** from ICCA, recovering 77% of pre-COVID volumes, with London, Edinburgh and Glasgow hosting the most meetings within the UK. **Europe** remains the key source of international associations who book international meetings, with many hosted at leading **universities**.
- Across trade shows and association meetings, a large majority link to **Growth Sectors** outlined in the Modern UK Industrial Strategy, particularly life sciences, finance and financial services, advanced manufacturing and technology
- Britain is a leading European destination for RFPs on **CVENT,** and important platform to generate leads from North America as well as the UK.

Cardiff, Wales ©Shutterstock/Darryl Sleath

Future trends

IACC

Meeting Room of the Future

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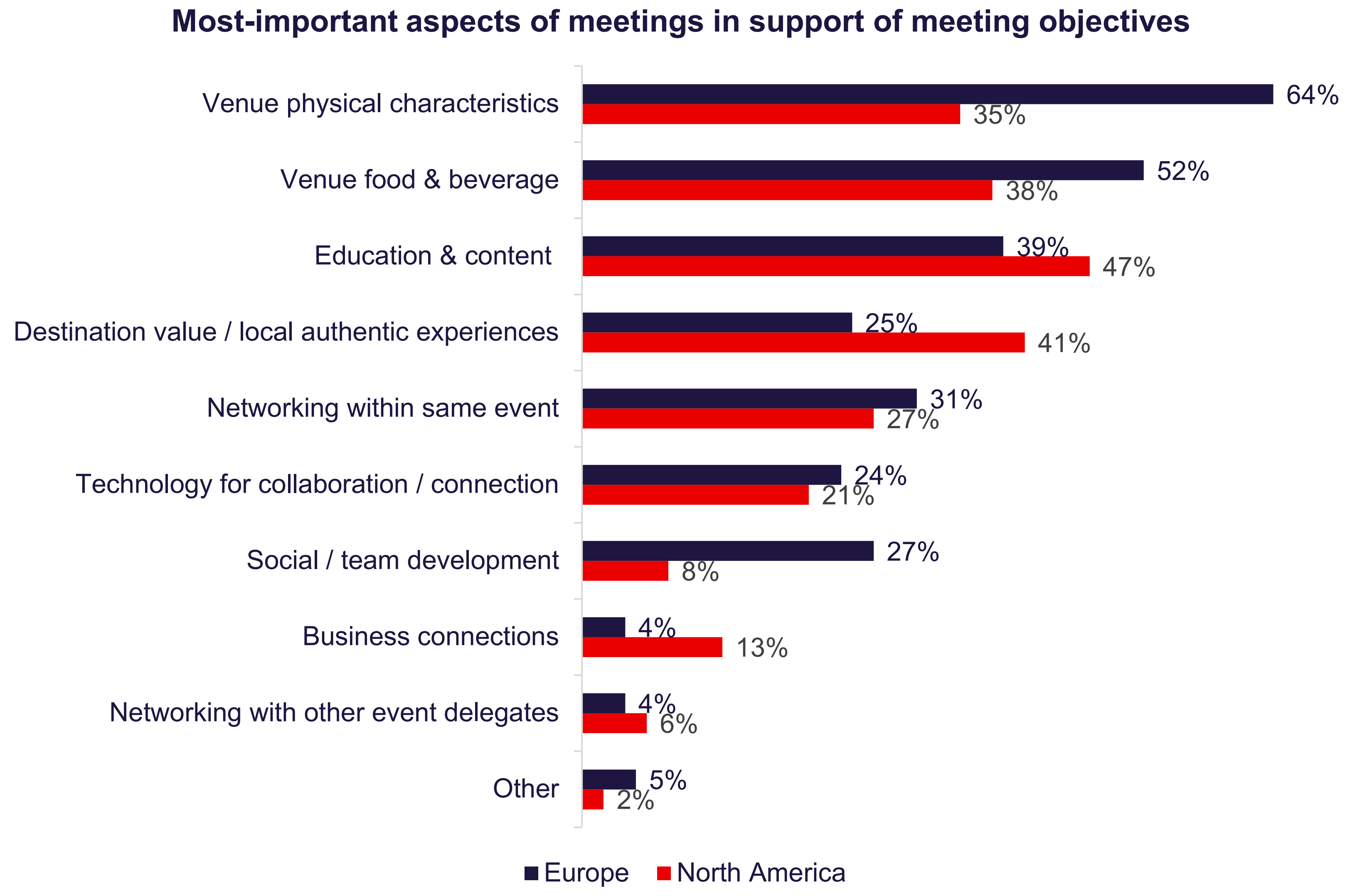
IACC | Evolving planners' priorities for meetings



- For North American planners, the education content is the most important factor (47%), followed closely by a destination's value and access to local, authentic experiences (41%).
- European planners are more inspired by the physical characteristics of a venue (64%) and the food and beverage offering within it (52%).
- According to IACC research, meetings that incorporate interactive, engaging environments through the venue, design, or atmosphere can be powerful catalysts for creativity and innovation.

Source: IACC Meeting Room of the Future Barometer 2025

IACC | 69% of planners think location and access will grow in importance by 2028

The most requested changes by planners during the next three years are:
1. Transparent and flexible pricing from venues
2. Better integrated technology and AV capabilities
3. More flexible rooms and layouts
4. Lower costs
5. More on-site support from AV and venue staff

- Location and access (69%) have topped the list of venue elements expected to grow in importance, jumping from third place last year.
- Interactive technology (63%) is expected to continue its growth in importance, reflecting the ongoing digital evolution. And with in-person events back in full swing and many planners moving away from hybrid models, food and beverage options (54%) are seen as exceptionally important.

Meeting venue elements expected to grow in importance during the next three years

Source: IACC Meeting Room of the Future Barometer 2025

Global Association Research Initiative

Purpose Under Pressure: Global Association Trends in 2025

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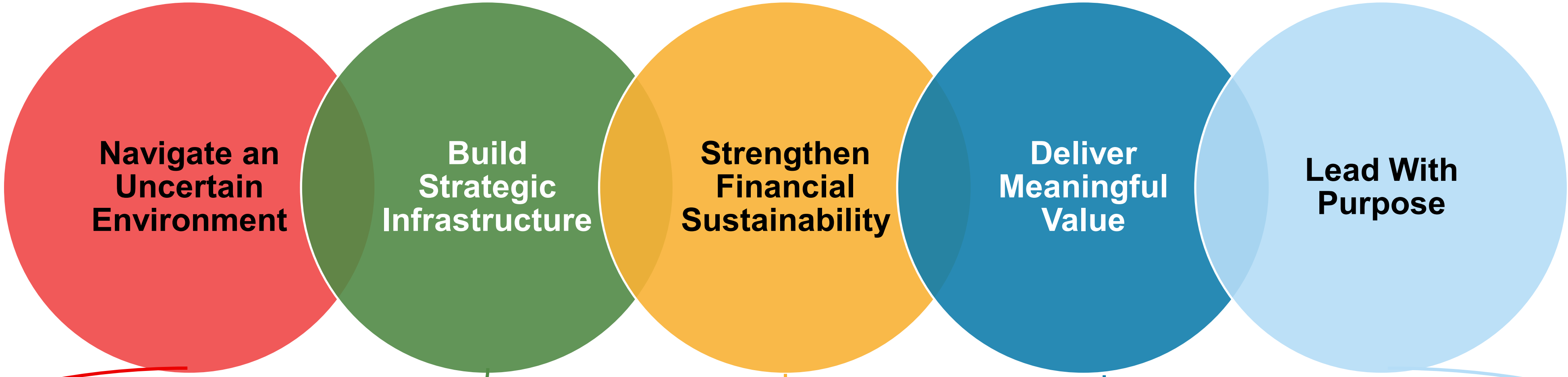
GARI | 5 strategic imperatives for associations in 2025



Environmental factors are impacting associations (e.g. geopolitical instability, economic volatility, digital evolution).

Members aren't just looking for information or services. They are looking for **stability**, **leadership**, and **belonging**. Associations should guide decisions, sustain trust, and provide a constant point of direction.

72% of association say adopting and integrating new technology remains a major operational hurdle.

Many associations are still operating on structures designed for a stable world. To be future-ready, associations must weave **adaptability** into the fabric of their operation.

84% of associations say financial sustainability is a significant challenge. And over 60% report difficulty with managing budgets, technology costs and demonstrating ROI.

Financial sustainability starts by fixing the foundations: **membership models, partnerships, ecosystems**. Experimenting with new revenue lines is essential, but only works if the core is stable, scalable, and well-managed.

86% of associations say delivering compelling member value is a significant challenge.

Associations must stop thinking about value purely in terms of offerings. Value is now measured by **relevance**, **immediacy**, and **emotional connection**.

71% of volunteers are motivated by a desire to contribute to their profession, community, or cause.

Associations with a **strong, well-communicated purpose** weather disruption better, attract stronger partnerships, and build deeper member loyalty further.

Source: Purpose Under Pressure - Global Association Trends in 2025

ICCA
Business Analytics Statistics Report

VisitBritain VisitEngland

ICCA | Navigating tomorrow's landscape

International association meetings are not merely recovering.
They are evolving with **purpose, innovation,** and **strategic intent.**

Key Trends

- Knowledge-drive partnerships
- Decentralisation and new players
- Sustainability as strategy no longer an option
- Shifting association needs

Emerging Challenges

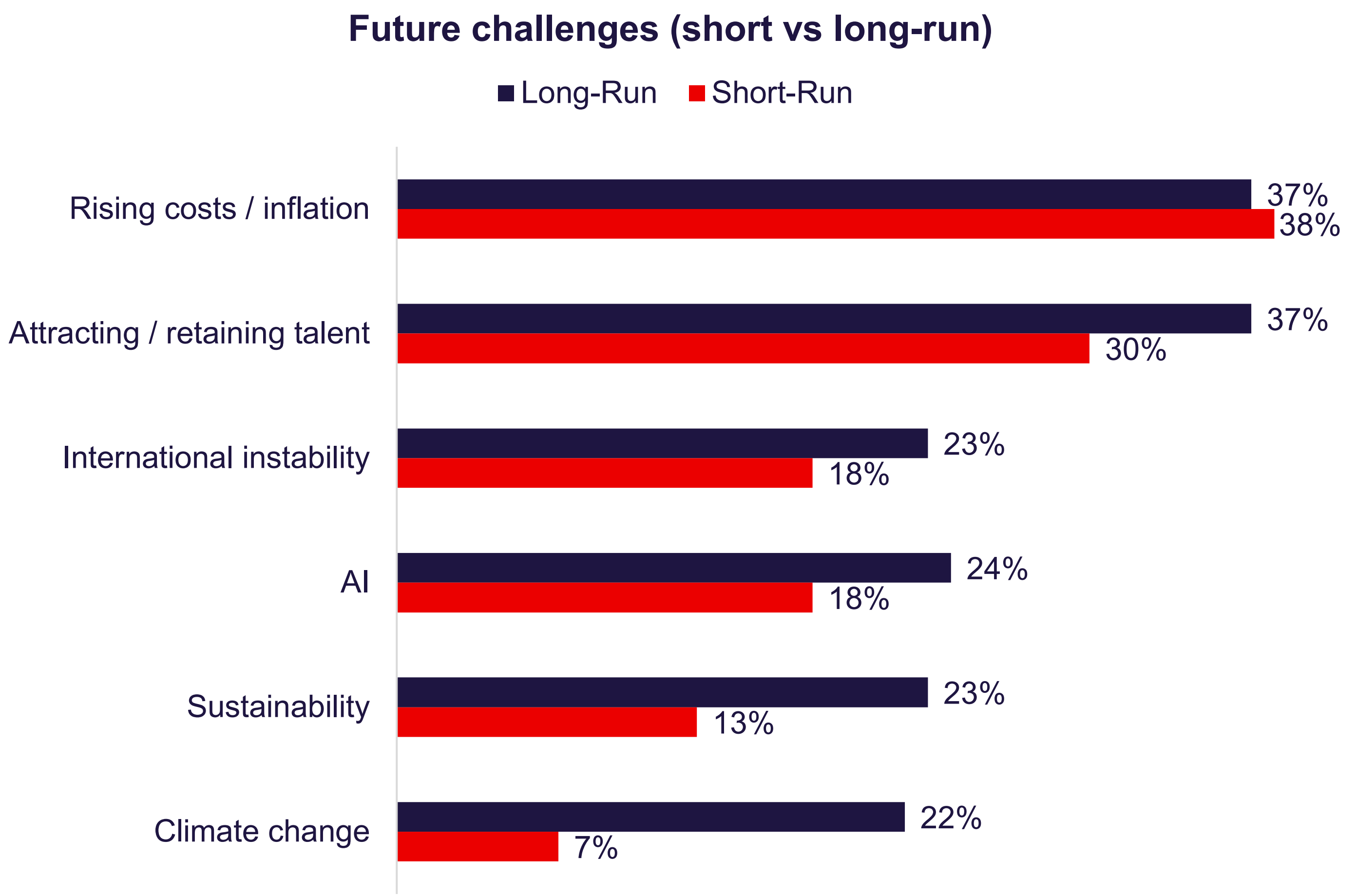
- Economic pressures
- Talent attraction, retention, upskilling
- Geopolitical complexity

Source: ICCA Business Analytics Statistics Report 2024

Incentive Research Foundation

Incentive Travel Index

IRF | Rising costs and talent retention are top challenges when considering incentive travel



- The most cited challenge faced by the industry when considering incentive travel is rising cost and inflation (38%).
- Concerns over sustainability and climate change are expected to grow in the future.

Source: Incentive Travel Index, 2024 Survey Highlights

IRF | Views on incentive travel are evolving

58% Incentive travel playing a more distinct role in motivation and culture building

40% Incentive travel programs for financial ROI

- The strategic importance of incentive travel is being bolstered by key workplace trends. Retaining talented employees (81%) and competitive advantages in hiring (62%) are cited often as increasing in importance.
- Many respondents indicated the greater focus on the carbon footprint of business will likely be strategically important.

Strategic importance of incentive travel

Source: Incentive Travel Index, 2024 Survey Highlights

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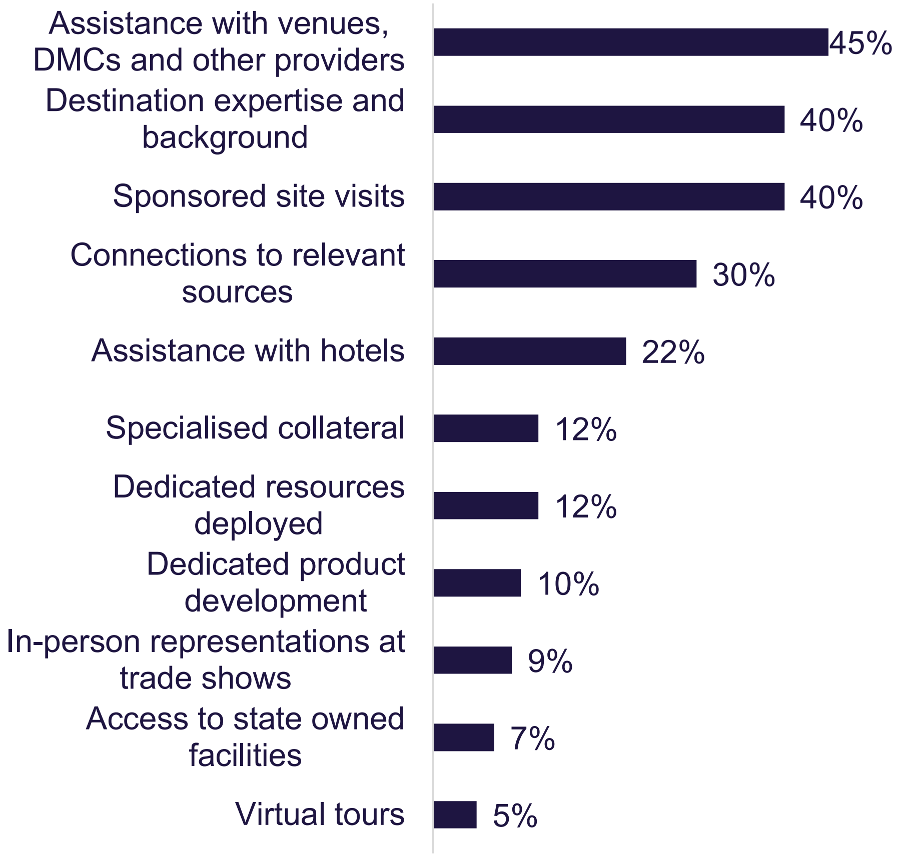
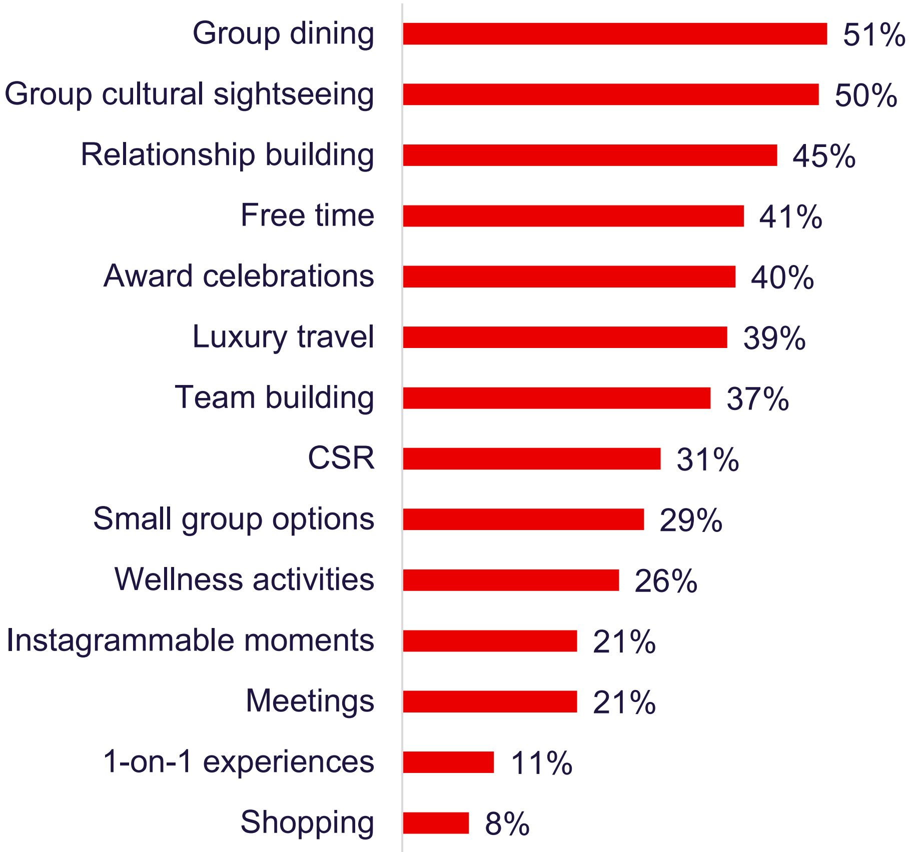
IRF | DMOs support & group dining activities are most valuable for a successful programme

Support from DMOs



- DMOs provide valuable support when it comes to incentive travel; assistance with venues, DMCs, and other service providers is most cited as the most useful support (45%).
- When looking at activities key to a successful programme, group dining (51%) is the most appreciated activity, with group cultural experiences (50%), relationship building (45%), and free time (41%) also considered important by most respondents.

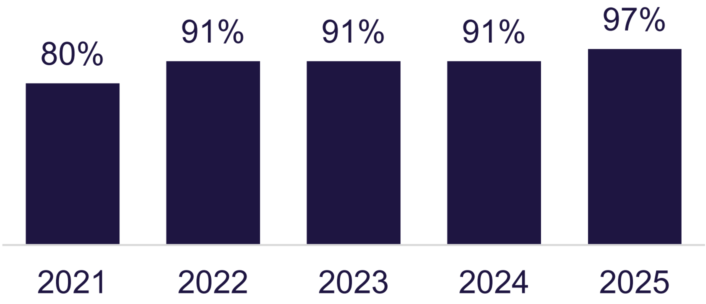
Activities key to a successful programme



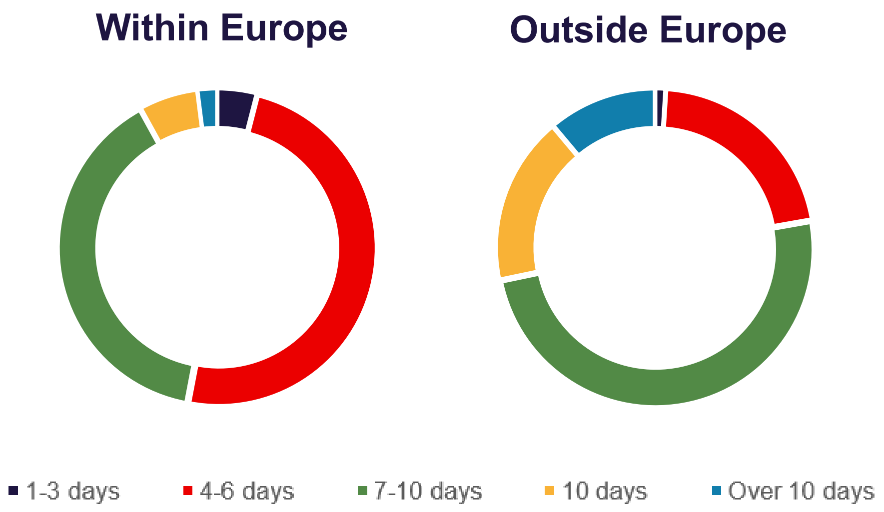
Source: Incentive Travel Index, 2024 Survey Highlights

IRF | Incentive travel continues to have high motivational appeal for European attendees

% finding group incentive travel extremely or very motivating



Ideal Trip Duration



- For the first time in three years, the percentage of people who find group incentive travel experience to be extremely or very motivating has increased (97%), with women more likely than men to find group travel ‘extremely motivating’.
- For both European and intercontinental destinations, employees tend to favour trips lasting between 4 and 10 days, leaning towards shorter stays within Europe, and slightly longer trips when travelling overseas.

Source: 2025 European Attendees Preferences for Incentive Travel

IRF | Western Europe ranks as the most highly motivating destination

Most Motivating Destinations

1st = Western Europe

2nd = The Nordics

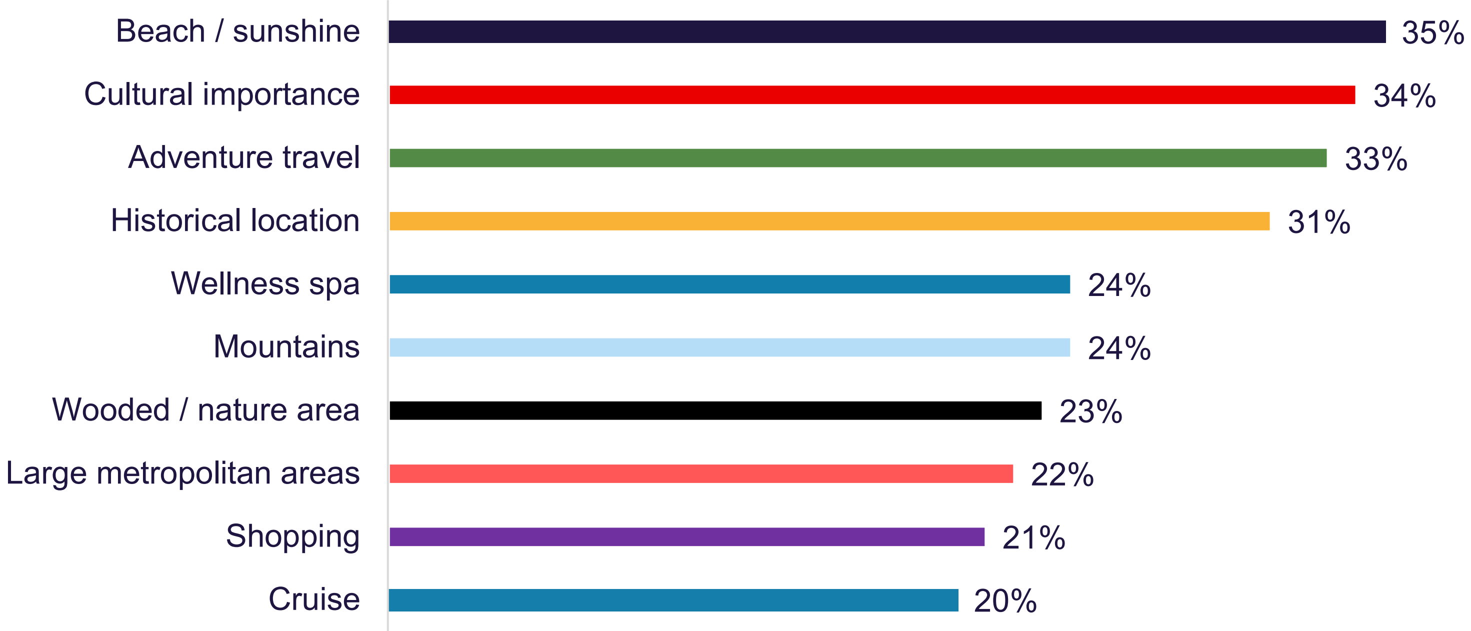
3rd = Eastern Europe

4th = East Asia

5th = North Africa

6th = Southeast Asia

Preferred Destination Features



- Europe and Asia are top travel destinations for incentive programmes for European attendees, with Western Europe ranking as the most motivating (48%).
- Looking at specific features, beach destinations are valued as being the top choice for incentive travel. This is closely followed by cultural importance and adventure travel. The least favoured destination features are shopping experiences and cruises.

Source: 2025 European Attendees Preferences for Incentive Travel

Events Industry Council

The Futures Landscape Report 2025

EIC | Top forces affecting the future of the events industry

Accessibility
Struggling to understand how to discern expectations and needs, while creating budgets to allow for accessibility implementation.

Advocacy
Efforts are fragmented due to diverse stakeholder interests, lack of coordination, and inconsistent messaging, despite the need to rev up in a post-pandemic landscape.

Business Models
Grappling with attracting sponsors, participants, and suppliers in an Attention Economy while also trying to support financial objectives required to meet business goals.

Climate Risk
The events industry, not just individuals, must play a bigger role in mitigating event externalities (e.g., pollution, waste).

DEI
DEI (and belonging) efforts are needed, but genuine internal implementation often lags, with stunted progress and lacking authenticity.

ESG
Organisations face challenges balancing profit with ESG goals, but many see its importance for brand reputation, employee engagement, and attracting attendees.

Infrastructure
Vital to event success, but existing infrastructure is aging and lacking adaptation strategies, at-risk of destination avoidance.

Mobility
Many worry about the impacts of global political forces, while others fear the commoditised value of mobility.

Risk & Security
Forced to be experts in security and risk management landscape, against the threat of client loss, brand reputational damage, financial loss, and employee retention.

Talent & Workforce Development
Rifts between generational working styles, work-life balance and purpose are coupled with a lack of investment in career trajectories and upskilling.

Technology
Fearful that AI productivity enablement and capacity-building potential will create increased professional burnout due to increased demands.

Wellbeing
High-pressure demands is at odds with growing trends that promote better wellbeing to retain employees and boost business performance

Source: EIC, The Futures Landscape Report 2025

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Sector trends | Key insights

- A report by IACC indicates a clear evolution in planners' expectations. Key venue elements anticipated to increase in importance include **location and accessibility**, **interactive technology**, and **food & beverage** offerings.

- The Global Association Research Initiative's report, "Purpose Under Pressure: Global Association Trends in 2025," outlines clear, actionable priorities for building future-ready associations, specifically emphasizing **stability**, **leadership**, **meaningful value**, and **purpose.**

- Similarly, a report from ICCA highlights the critical importance of association evolution for **overcoming emerging challenges** such as economic pressure, talent attraction & retention, upskilling, and geopolitical complexity.

- The IRF survey revealed that **DMO support** is paramount for successful incentive programs, with **group dining** and **cultural sightseeing** being highly valued by attendees.

- Among European attendees, incentive travel demonstrates **high motivational appeal**. The ideal incentive trip is typically 4-10 days in duration, with **Western Europe** identified as the most motivating destination.

London, England ©VisitBritain/Michael Matti

Q&A

Thank you for your partnership and support!

Do not hesitate to contact us with any enquiries

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