

GLOBAL DESTINATION REPORT 2026





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Foreword

The 2026 Global Destination Report by The Business of Events arrives at a pivotal moment for our sector. Having successfully navigated the disruption of recent years, the report shows that our industry has now entered a new era. One defined not by recovery, but by resilience and complexity, value and external pressures.

We are living in turbulent times, but what comes across loud and clear from this latest report is the enormous economic value our sector generates. What is also evident is the evolving nature of how we, as an industry, report our successes, with so-called softer measures of impact - such as legacy, sustainability, knowledge exchange and sector development - playing an increasingly important role, despite being difficult to measure.

The report demonstrates that as a sector, we are performing well despite budget constraints, but it also highlights that destinations with greater spending power consistently return greater economic impact. Additionally, it reveals that the department business events sit within can have a significant impact on the support individual destinations receive and, in turn, how well they perform.

Although it varies by destination, our asks are not always about money either, as this report shows. Greater recognition, infrastructure, practical funding mechanisms, and stronger tools to evidence impact are also top of many destinations' wish lists.

My colleagues at VisitScotland and I have long advocated for this kind of holistic approach to measuring and demonstrating the value of business events. Our sector produces incredible results, from bringing people together, to creating jobs, stimulating local economies, and enabling the exchange of expertise and knowledge that drives innovation and opportunity in communities.

It's vital that we continue to highlight our value to governments, to ensure we all receive the level of support we need to deliver effectively and continue providing real value and meaningful social and economic progress for our destinations and communities.

The ongoing work of TBOE and this report provides the evidence base to help us make that case. I hope it informs meaningful conversations with decision-makers and policymakers, and helps drive the sustained investment and recognition our sector deserves.



Neil Brownlee
Head of Business Events



Project scope and objectives

The following report presents findings from research commissioned by The Business of Events, the leading think tank and advocacy network for the global business events sector, operated by destination communications specialists Davies Tanner. The research was undertaken by business events research specialists SFA Connect.

This report represents the fifth edition of The Business of Events Global Destination Report. Produced annually, the report gathers insight from destinations worldwide to better understand the current state of the business events sector, the support and advocacy mechanisms currently in place, and the areas where further action is required. The findings are intended to support industry engagement with policymakers, decision-makers, and government stakeholders by strengthening understanding of the economic and wider societal value

generated by business events, and the importance of sustained investment and support. The survey and interviews informing this report were based on 2025 data, experiences, and market conditions.

A mixed-method research approach was adopted for the research, combining surveys, interviews, and data and content analysis. This approach enabled both quantitative and qualitative insights to be gathered, providing a more holistic understanding of the sector. The quantitative research allowed for broader participation and statistical analysis across the sample, while the qualitative interviews provided deeper insight into the trends, challenges, and strategic issues influencing destinations globally. Together, these methods enabled both the identification of key market patterns and a deeper understanding of the factors driving them.



Executive summary

The 2026 TBOE Global Destination Report highlights a business events sector that has transitioned from post-pandemic recovery into a phase of stabilisation. Survey findings show that performance remains positive overall, but growth is moderating, while interviews point to a more complex operating environment shaped by structural constraints and external pressures. It should be noted that the survey was distributed before the start of the current situation involving Iran, although responses continued to be collected afterward, whereas the interviews took place after the situation began.

The findings highlight variation across destination types, geographies, and respondent groups, while also identifying broader patterns and trends across the dataset. For the purpose of this research, Tier-1 refers to capital cities, Tier-2 to large towns or mid-size cities, and region to a state or province.

Across both datasets, surveys and interviews, a consistent picture emerges: the sector is resilient and evolving, with fewer destinations reporting decline and more reporting steady year-on-year conditions, but increasingly influenced by constraints in resourcing, funding, connectivity (specifically Tier-2), and policy alignment, alongside wider geopolitical and economic conditions. Interview findings reinforce connectivity as a growing issue for competitiveness.

Collectively, the findings suggest the sector has entered a new phase defined less by post-pandemic recovery and more by strategic repositioning, with competitiveness increasingly shaped by value, connectivity, sustainability, policy alignment, and long-term impact.



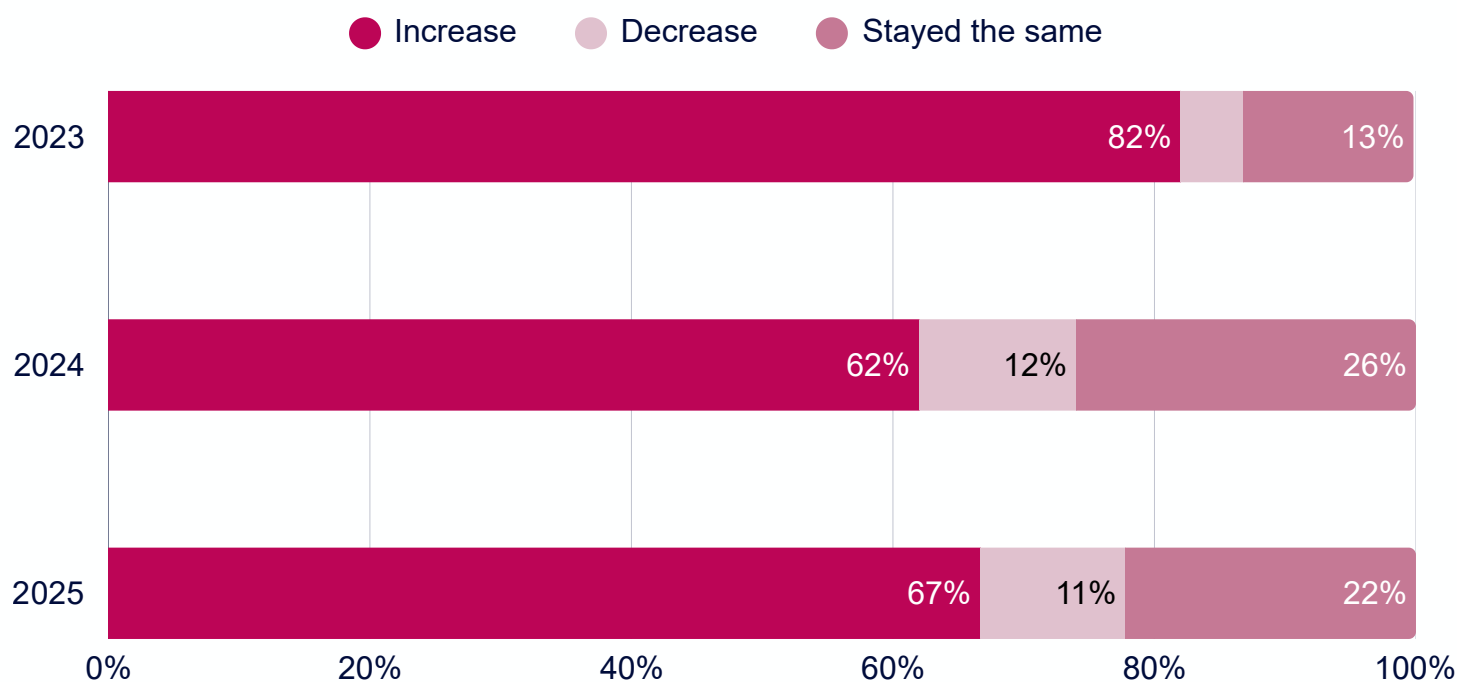
Key findings

Growth is stabilising, with clear signs of resilience

Event activity has stabilised, with around **90%** of destinations reporting stable or increasing volumes, while growth in economic value has increased in 2025 to **67%**, following a dip in 2024 and after a peak in 2023.

Growth was strongest in international event activity, with destinations reporting stronger recovery and expansion in international events than in national or regional markets. Notably, this improvement in economic value occurred despite **80%** of respondents reporting stable or reduced budgets, highlighting continued resilience under constrained conditions.

Perceived change in direct economic value 2023 - 2025



This confirms a shift from rapid post-pandemic rebound to more moderate, sustainable growth. Interviews reinforce this trend, highlighting that the sector is increasingly shifting from a purely volume-led recovery towards more value-led growth, with destinations placing greater emphasis on higher-yield events, sector alignment, delegate spend, and longer-term economic and strategic impact rather than event volume alone.

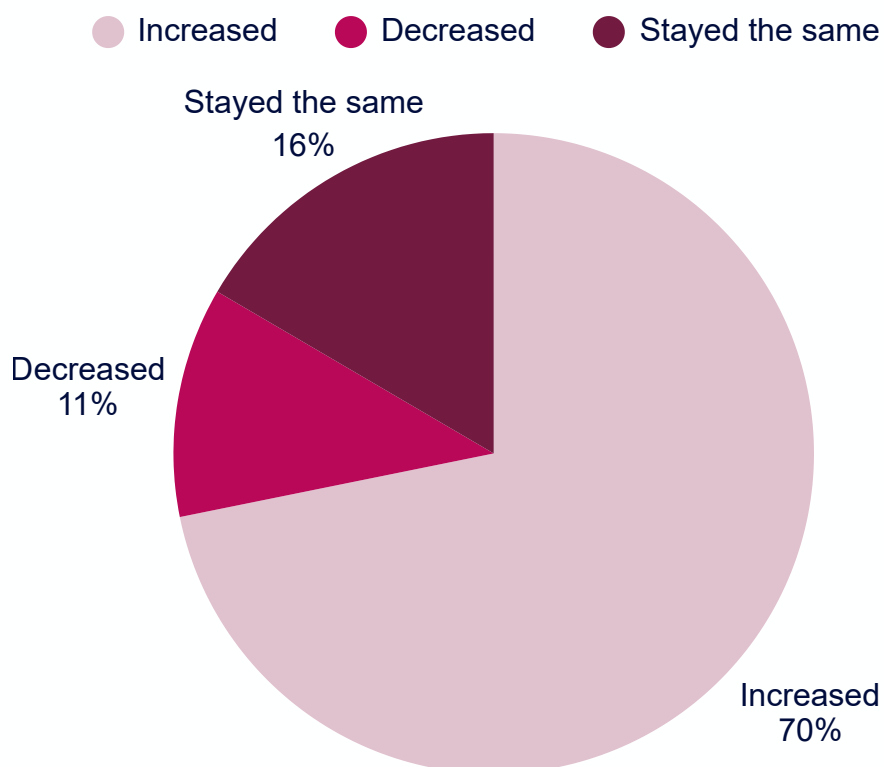
Association events continue to act as a stabilising force across the sector, consistently demonstrating greater resilience than corporate or incentive business during periods of uncertainty.

Structural under-resourcing continues to constrain growth

Team capacity remains a core challenge, with over half of respondents (**58%**) reporting that their teams are too small to deliver against their objectives, despite gradual improvement in recent years. This constraint is not evenly distributed geographically, with respondents from Asia and Oceania reporting the highest levels of satisfaction with resourcing, while respondents from Central and Southern America, Africa, and Eastern Europe reported the lowest levels.

However, many destinations reporting growth in event volume or economic value also reported that their teams remained under-resourced, suggesting that continued capacity constraints may limit future growth. Notably, **70%** of respondents who considered their teams under-resourced still reported growth in economic value, suggesting demand is increasingly outpacing organisational capacity.

Economic Value Growth Among Under-Resourced Teams

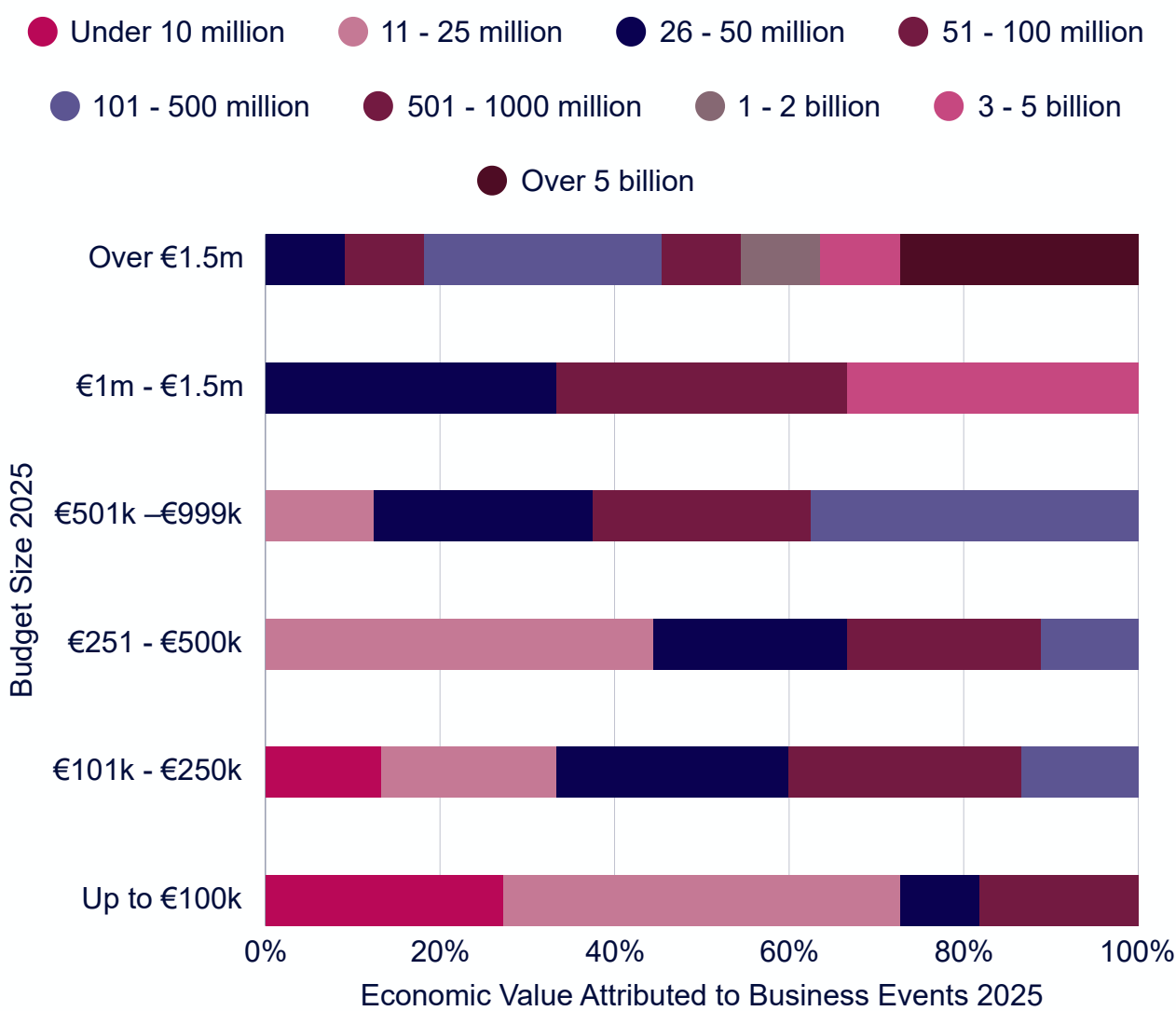


Interviews highlight that this gap in resources affects not just operational delivery, but the ability to invest in higher-value functions such as international business development, market intelligence, sustainability, and legacy programming, areas that are increasingly critical to competitiveness.

Funding is stable overall, but low compared to economic impact

Funding conditions remain relatively stable, with around three quarters of destinations reporting stable or increased budgets. While this indicates a more settled funding environment than 2024, growth remains below the peak levels seen in 2023. Despite this, the sector remains financially constrained, with **59%** of destinations operating with budgets below €500k. Budget reductions were disproportionately concentrated among non-Tier-1 destinations, raising concerns around structural funding vulnerability among other destinations.

The findings indicate that even comparatively modest business events budgets may still be associated with substantial economic impact, reinforcing the sector’s value-for-investment case. Notably, **86%** of destinations operating with budgets below €500k still reported annual economic impacts exceeding €10 million.



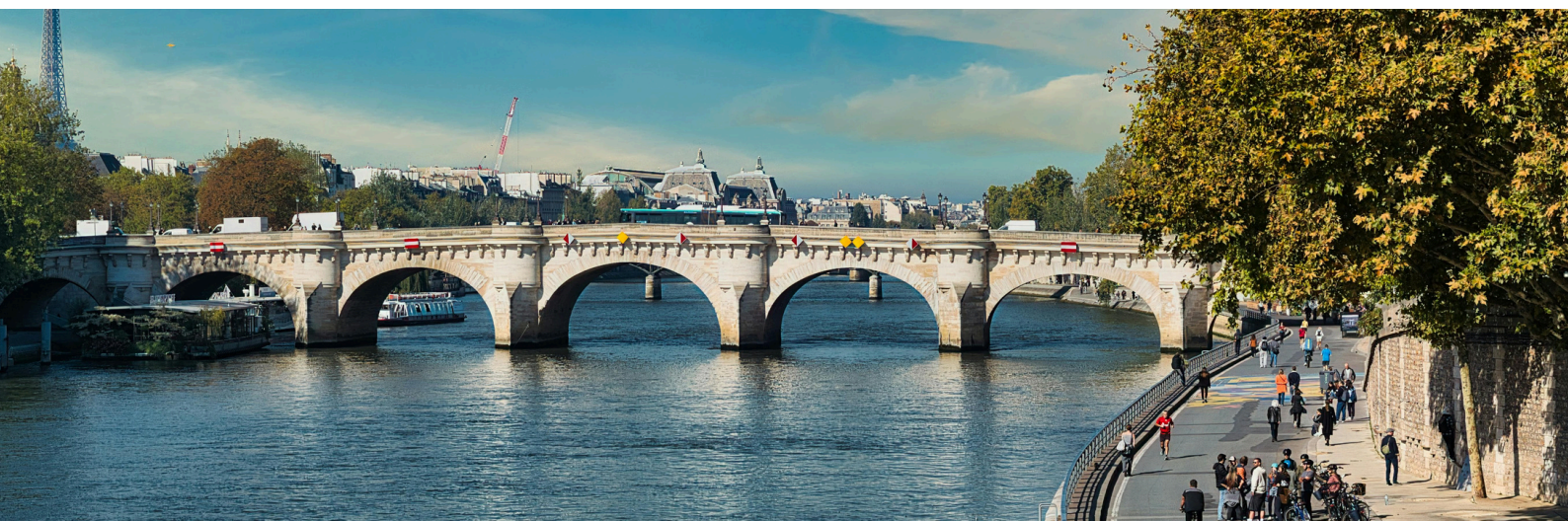
When looking across budget received and the effect that has on economic impact there is a clear relationship that emerges between organisational budget size and reported economic impact. Lower-budget organisations are more commonly associated with lower economic value categories, while organisations with budgets above €1m are increasingly linked to impacts measured in the billions. The findings suggest that larger-budget organisations tend to generate substantially greater economic returns from business events activities.

While bid and subvention funding shows similar stability, interviews suggest this masks ongoing structural fragility, with many funding mechanisms dependent on short-term political cycles, temporary post-pandemic funding arrangements, and variable subvention models. This limits the ability of destinations to invest in long-term capability and strategic growth.

Economic impact remains significant but uneven

Business events continue to generate substantial economic value across destinations globally. In 2025, **68%** of respondents reported annual economic value exceeding €25 million, while **17%** reported impacts above €500 million, including **7%** exceeding €5 billion. However, economic impact remains unevenly distributed, with the highest-value contributions concentrated among a smaller group of destinations, particularly in Southern Europe and North America.

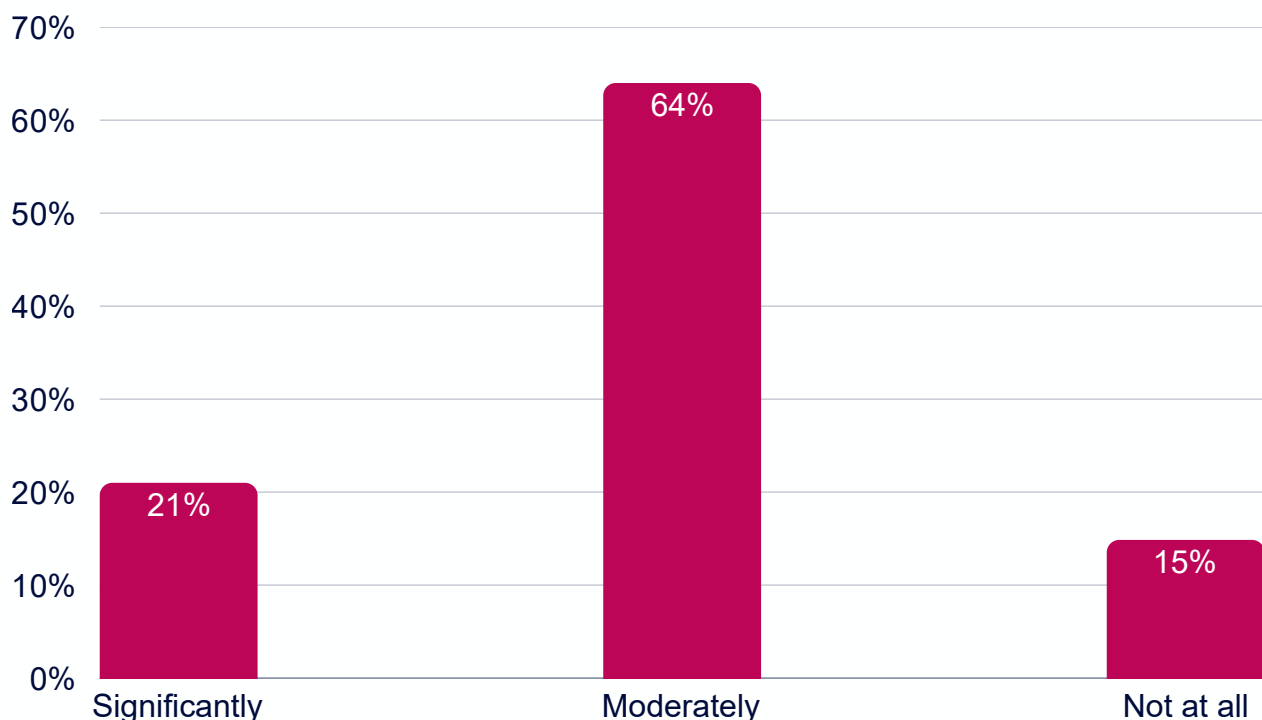
This pattern remains broadly consistent with previous years, with no significant shift in the overall distribution of economic impact. Structural differences exist across destination types as expected, however, several Tier-2 destinations demonstrate strong growth and competitiveness despite comparatively modest budgets. Interviews reinforce that many Tier-2 destinations are adapting by focusing on value, affordability, and sector alignment, rather than competing directly on scale or volume.



Global performance is uneven and increasingly shaped by external pressures

Performance varies across regions, with some destinations reporting strong stability or growth and others experiencing more mixed conditions. At the same time, external pressures are playing an increasingly significant role.

Geopolitical factors were already a substantial influencing factor, with around **86%** of respondents reporting moderate to significant impact on their ability to attract and deliver events.



Interviews highlight how this is experienced in practice:

- **Some US destinations** are experiencing increasing challenges linked to **international perception, visa access, and geopolitical positioning**, particularly in attracting international attendance.
- **Tier-2 destinations** specifically those in **Canada** are benefiting from shifting demand patterns, particularly where **affordability, accessibility, and value-led positioning** provide competitive advantage.
- **European destinations** show a more mixed pattern, with both **risks and opportunities** emerging from global instability.

In addition, cost inflation and changing market confidence are affecting both demand and competitiveness across all regions.

Tier-2 destinations are strengthening their competitive position

Tier-2 destinations are becoming increasingly competitive despite operating with limited resources. Findings also suggest that comparatively modest budgets are not necessarily limiting growth, with several Tier-2 destinations reporting increasing event activity and growing economic value generation.

Interviews highlight a clear shift in market dynamics. These destinations are leveraging advantages such as:

- **Affordability**
- **Compactness and ease of navigation**
- **Strong sector alignment**
- **Enhanced delegate experience**

Interviews also suggest that Tier-2 destinations are increasingly leveraging closer stakeholder collaboration, walkability, and more personalised delegate experiences as competitive differentiators.

However, connectivity emerges as one of the most consistent and marked challenges in the interviews for Tier-2 destinations. Limitations in air access, route availability, and regional transport infrastructure can directly affect a destination's ability to compete for international events. Despite these constraints, many Tier-2 destinations are successfully positioning themselves as high-value alternatives to more expensive Tier-1 hubs.

At the same time, Tier-1 destinations are often repositioning toward higher-value, premium offerings, sometimes at the expense of volume. This is contributing to a more segmented and differentiated global market.

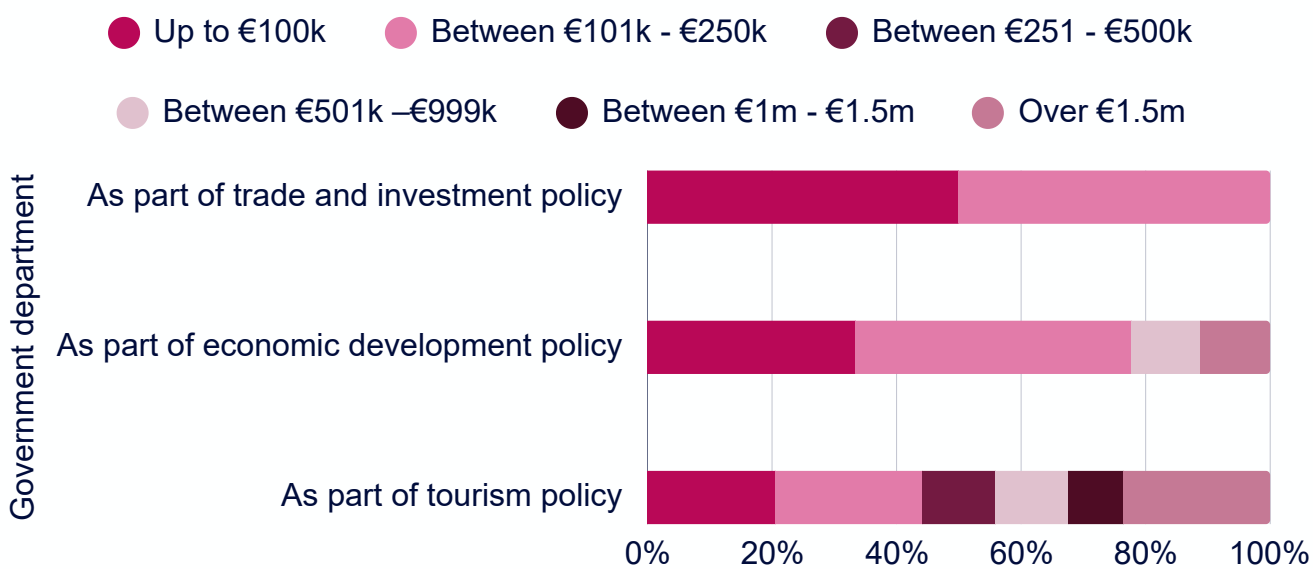
Policy positioning remains largely unchanged

Business events continue to be primarily positioned within tourism policy, with **56%** of respondents indicating this as their main alignment, slightly higher than 2023 (the question was not asked in 2024).

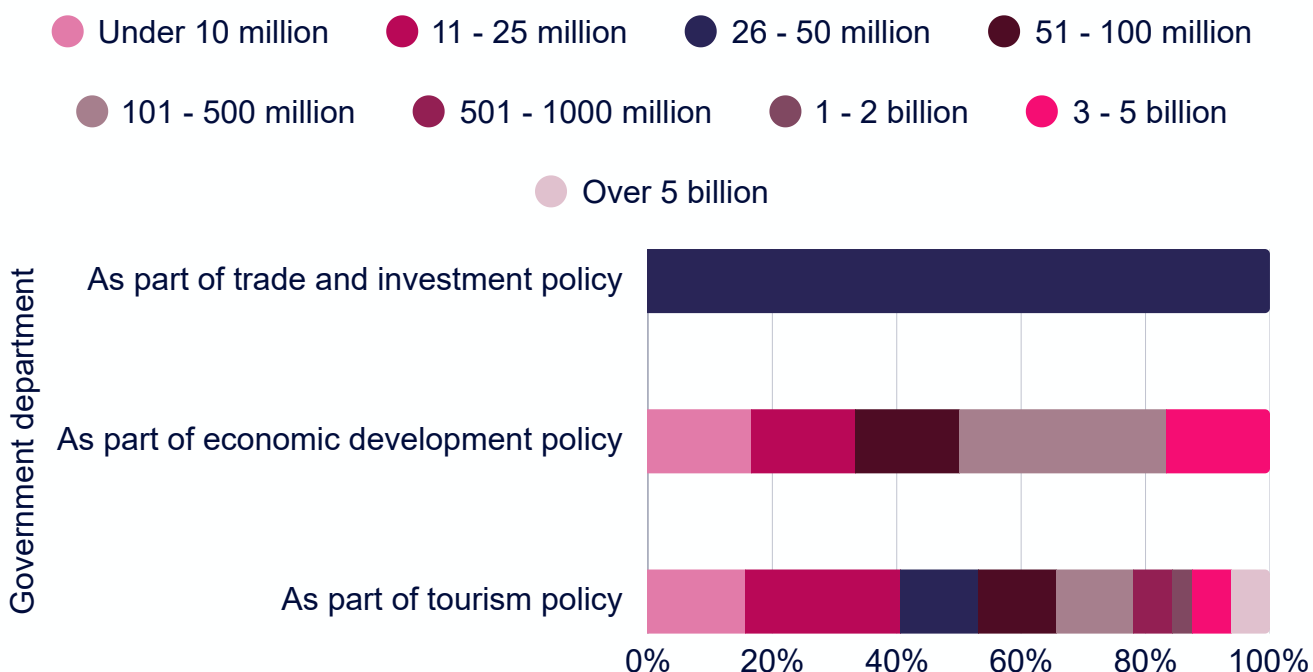
However, perceptions of support received remain low, with the majority of respondents indicating that business events are still not sufficiently supported. Interviews highlight a clear disconnect between how destination marketing organisations increasingly view business events as drivers of innovation, trade, and talent, versus how they are positioned within government structures.

Cross-analysis suggests that organisational positioning within government structures may be associated with funding levels and economic outcomes. Destinations where business events are positioned across economic development frameworks and particularly tourism policy were more likely to report higher funding levels and stronger economic value generation than those positioned solely within trade and investment structures.

Budget received



Economic value



Economic evidence acts as the dominant government advocacy tool

Economic impact and return on investment are reported to be the most effective advocacy arguments when engaging governments and policymakers, while softer themes such as skills and talent development, regional development, and place competitiveness are generally viewed as less compelling.

Interviews highlight the growing importance destinations increasingly associate with business events beyond direct economic impact, including legacy, sustainability, knowledge exchange and sector development. However, with the exception of sustainability, which is becoming more operationalised through frameworks and standards, these wider impacts often remain difficult to measure due to the time, cost, and complexity involved. As a result, there is often limited evidence available to support advocacy efforts with governments and policymakers, contributing to economic impact and return on investment continuing to dominate government advocacy approaches.

Survey data shows that government support is most commonly delivered through:

- **Direct funding or subvention (around 72%)**
- **Infrastructure investment (around 55%)**
- **Dedicated strategies or policies (around 52%)**

Together, these findings suggest that government support is currently most visible through financial mechanisms, while softer forms of support are less commonly reported. This sits alongside the finding that economic impact and return on investment remain the strongest advocacy arguments, suggesting that measurable economic value continues to be central to how business events are positioned to government.



Implications and strategic priorities

The combined survey and interview findings point to a clear agenda for strengthening the sector:

- Develop stable and flexible funding mechanisms that support bidding, event delivery, delegate growth, legacy programming and long-term market development
- Invest in organisational capability, particularly business development, market intelligence, advocacy, legacy design, sustainability delivery and impact evaluation
- Prioritise connectivity and access, especially for Tier-2 and regional destinations, where air access, route availability and transport infrastructure remain key competitiveness constraints
- Strengthen recognition of business events as contributors to economic development, innovation, trade, talent attraction, knowledge exchange and sector growth, alongside their role within tourism
- Build more formal whole-of-government support systems, including coordinated letters of support, speaker access, political hosting, civic engagement and links with relevant sector ministries
- Improve measurement of long-term impact, including legacy, knowledge exchange, sector development, sustainability outcomes and wider economic value
- Operationalise sustainability and inclusion through practical tools, standards, partnerships and measurable delivery frameworks
- Support Tier-2 destinations to capitalise on their growing competitiveness, particularly around affordability, compactness, stakeholder collaboration, sector alignment and delegate experience while addressing access and connectivity constraints.



The findings suggest that without these changes, the sector's growth risks plateauing despite strong underlying demand and demonstrated economic value.

Conclusion

These findings are reinforced by consistent themes emerging from the interviews, including the shift toward value-driven growth, the growing competitiveness of Tier-2 destinations, the fragility of funding models, and the increasing influence of external pressures such as geopolitics and connectivity.

At the time of the research the business events sector is entering a phase of stabilisation, structural adjustment, and increasing complexity. Growth continues at a more moderate pace, supported by resilient demand, but is increasingly shaped by structural constraints and external pressures.

Funding and resourcing remain constrained, connectivity is emerging as a critical limiting factor, and while the sector's broader value is increasingly recognised, this is not yet fully reflected in policy frameworks or investment decisions. Collectively, the report highlights a sector that is resilient and evolving, but which requires stronger alignment between its economic and wider societal contribution (legacy, sustainability, DEI, knowledge exchange) and the policy frameworks, funding models, infrastructure and evidence base needed to support its future growth.

Deeper dive: Survey and interview findings

The following analysis provides an overview of the responses received from an online survey distributed to a global audience of over 1,000 contacts, including Convention and Visitor Bureaus, Destination Marketing Organisations and National Tourism Organisations. The survey was designed to gather quantitative data, with all responses collected anonymously and treated as confidential. This approach was intended to encourage open and honest feedback, thereby supporting response quality and reliability.

The first two questions serve as identifier questions, enabling comparisons and the identification of trends across different geographic regions and destination types when of interest (e.g. country, region, Tier-1, Tier-2 etc). Percentages may not total 100% due to rounding and/or excluded 'unsure' responses. Where a category is not shown, no valid responses were available





Q1: Where in the world are you located?

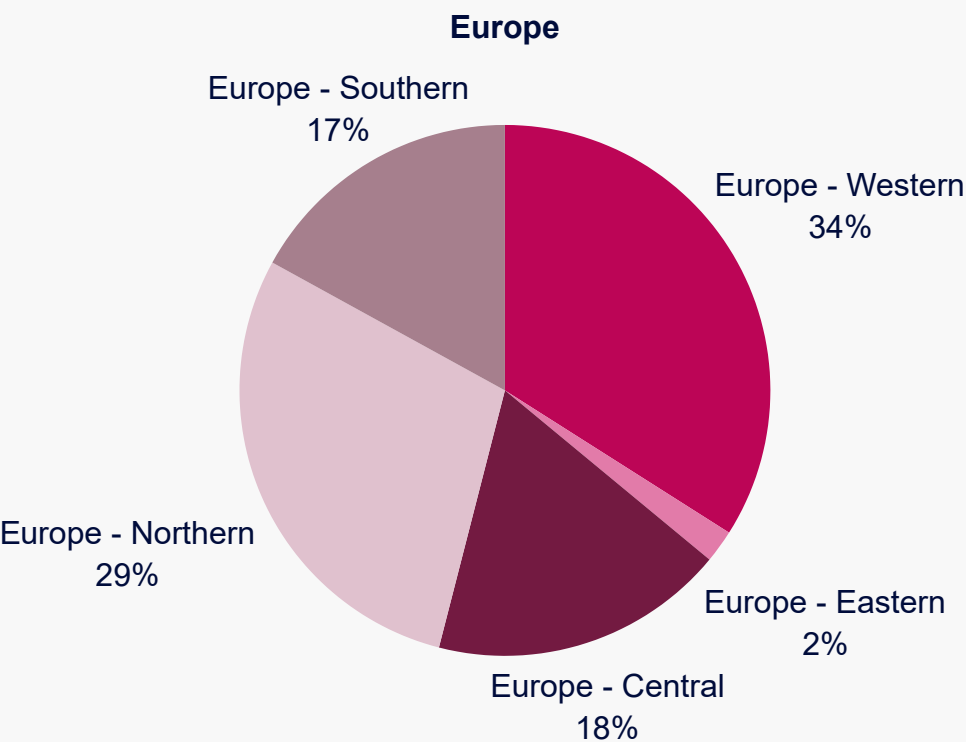
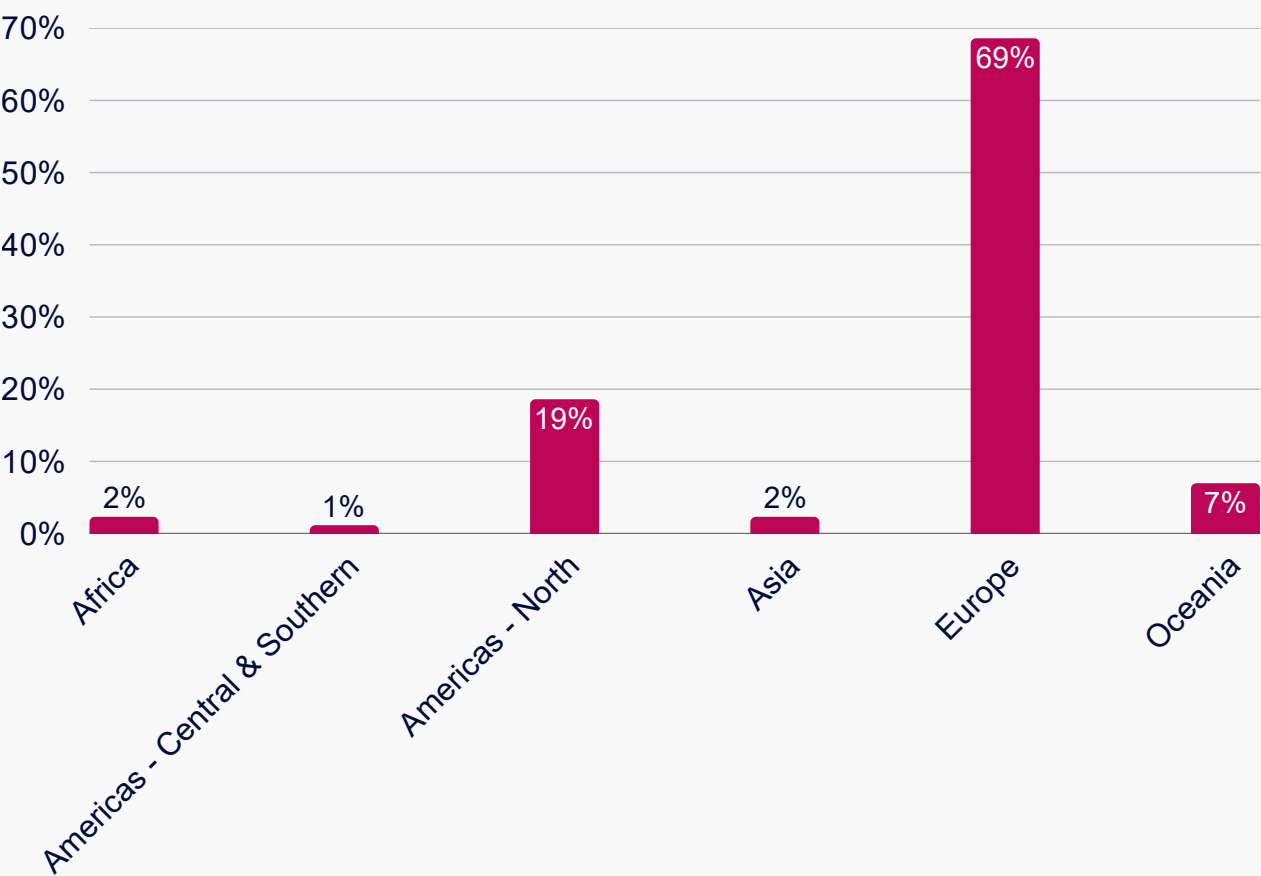
Overall, the sample remains strongly Europe-led, while still providing a wider global perspective through responses from North America, Asia, Oceania, Africa and Central & Southern America. Within Europe, the response profile is more balanced than in previous years, with Western and Northern Europe accounting for the largest shares.

As with the previous surveys, despite global distribution the majority of respondents were based in Europe (**69%**), with almost one third outside Europe. What did differ this year was the proportion of responses from North America at **19%** compared to **14%** or under in previous years.

While responses continue to be Europe-dominated, the proportion of non-European respondents provides a global perspective. No responses were recorded from the Middle East this year, which differs from previous surveys.

Within Europe, the distribution has shifted compared to last year and is now more balanced. Western Europe represents the largest share (**34%**), followed by Northern Europe (**29%**) and Southern Europe (**17%**), with Central Europe remaining stable (**18%**) and Eastern Europe contributing a smaller proportion (**2%**). Notably, Northern Europe's dominance has declined from the previous year, while Western and Southern Europe have seen increased participation.

Overall, the dataset maintains a strong European core while reflecting growing engagement from North America and other regions, alongside a more diversified spread of responses within Europe itself.

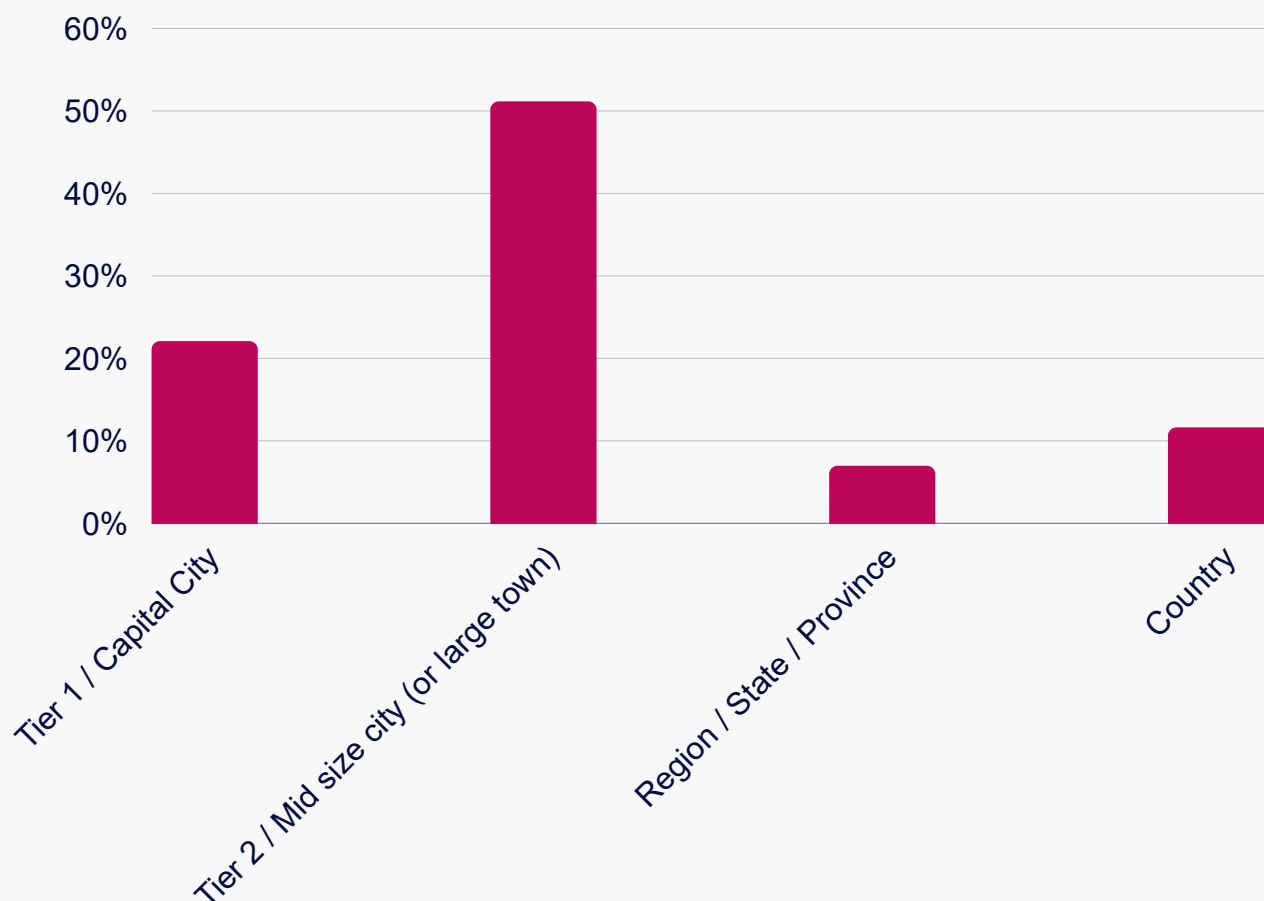


Q2: What type of destination are you representing?

Overall, Tier-2 destinations continue to represent the largest share of respondents, with the overall profile of destination types remaining broadly consistent year-on-year. This reinforces the importance of Tier-2 within the global business events landscape.

The majority of respondents continue to represent Tier-2 destinations (**51%**), showing a very similar distribution to last year. The remaining responses are split across country, region/state, and Tier-1/capital city levels, with no significant shifts in overall representation.

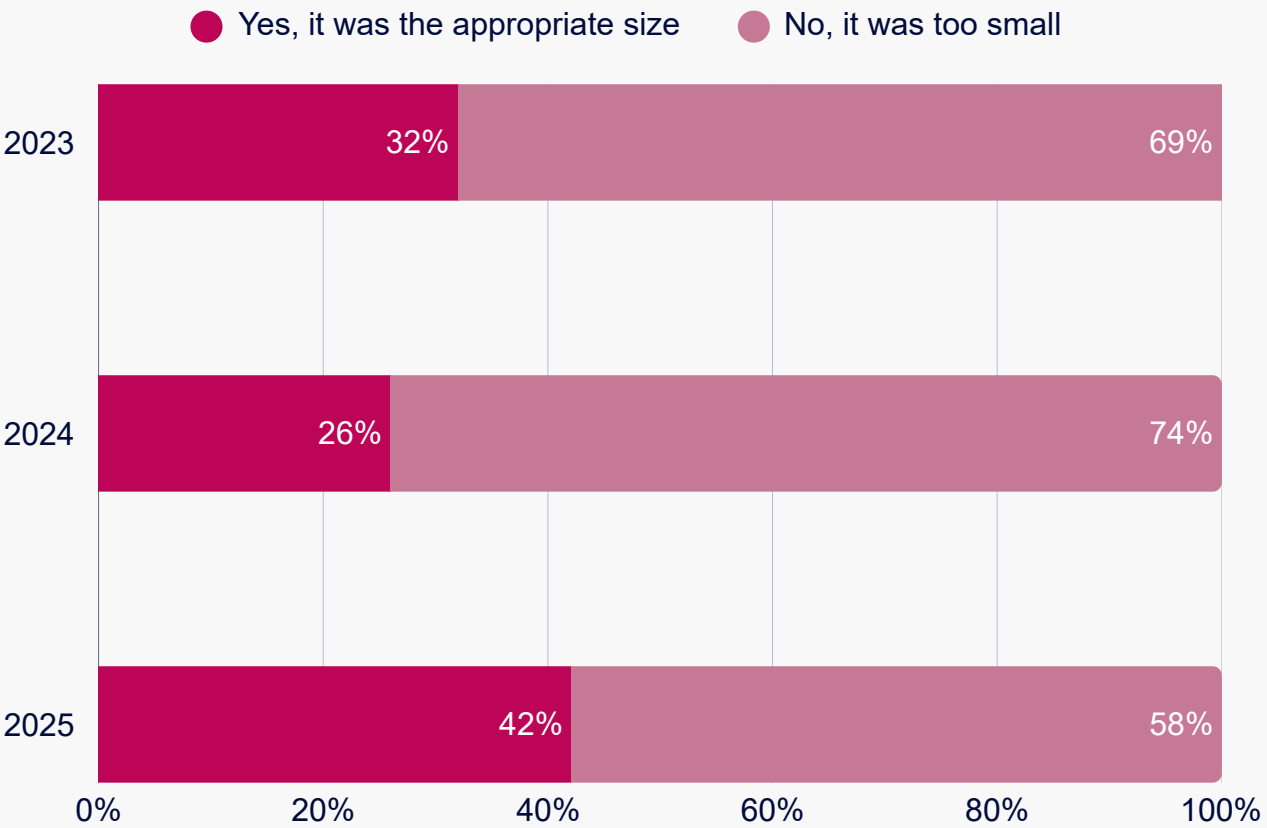
This consistency suggests that the profile of responding destinations has remained stable year-on-year, with Tier-2 continuing to dominate. Notably, within Europe, this trend is even more pronounced, with **58%** of responses coming from Tier-2 locations.



Q3: Do you believe that the size of your team is appropriate for the size and scope of your city/country i.e. do you have enough resources to deliver on your objectives?

Overall, the data highlights an ongoing structural challenge, with most destinations continuing to report constrained human resources across all three years. While perceptions improved in 2025 following a decline in 2024, the results suggest staffing capacity remains a persistent issue, with the majority of destinations still reporting their teams were too small.

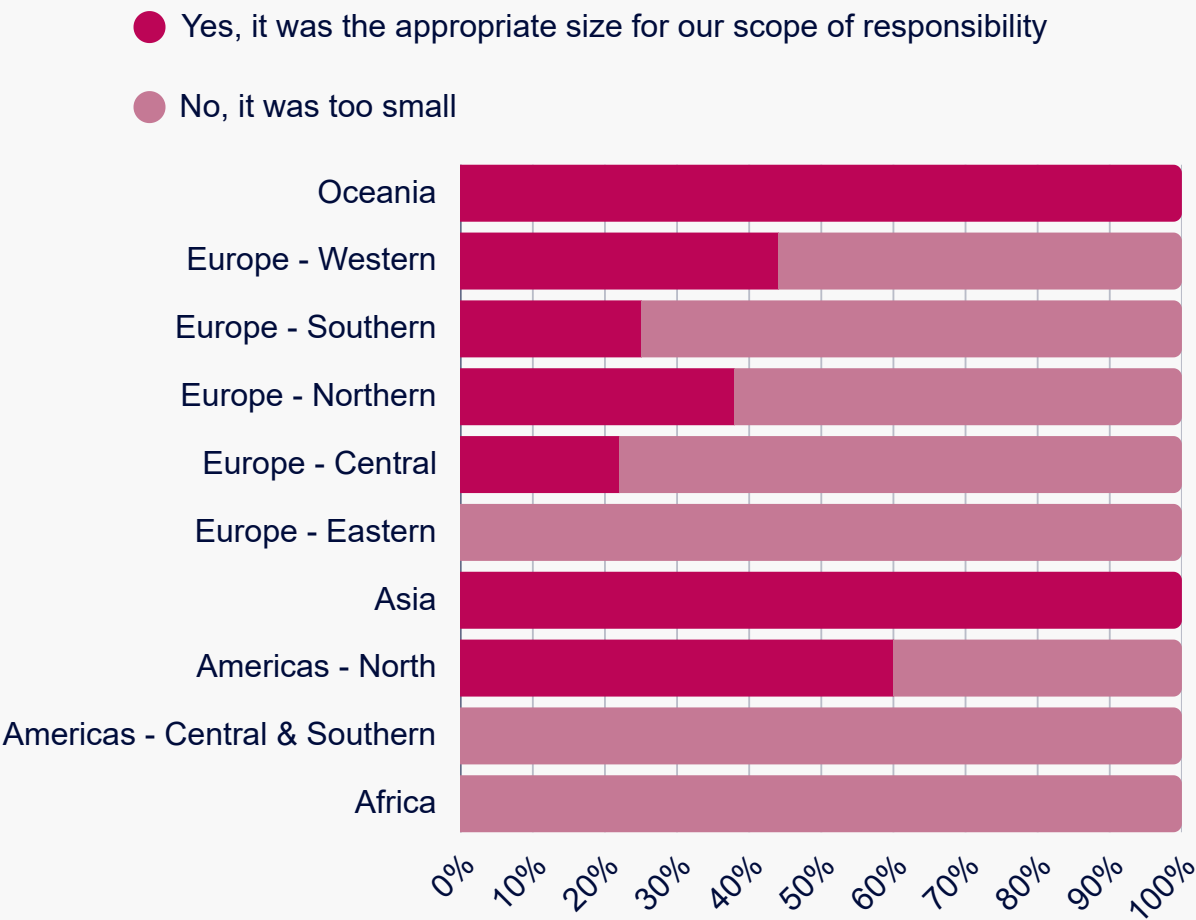
A majority of respondents (58%) report that their teams are too small to meet the demands of their destination, however this represents an improvement compared to previous years. The proportion of respondents who believe their team size is appropriate has increased, indicating gradual progress. However, despite this improvement, under-resourcing remains the dominant experience across the sector.



Regional variation is evident in perceptions of team capacity. Asia and Oceania have strong alignment between team size and demand, with all respondents indicating that resourcing is appropriate, Americas-North at **60%** also reports high levels of satisfaction in team size. In contrast, Central and South America, Africa, and Eastern Europe show the lowest satisfaction with team size, with all reporting their teams to be too small.

Europe when looked at as a whole continues to show notable capacity pressure. However, when split there are clear regional differences across Europe in perceptions of team capacity. Eastern Europe view their teams as too small for the scale of responsibility. Concerns around under-resourcing were also prominent in Central and Southern Europe.

By contrast, Northern Europe appeared comparatively better resourced, with a higher proportion reporting that team size was appropriate, while Western Europe showed a more balanced distribution of views.

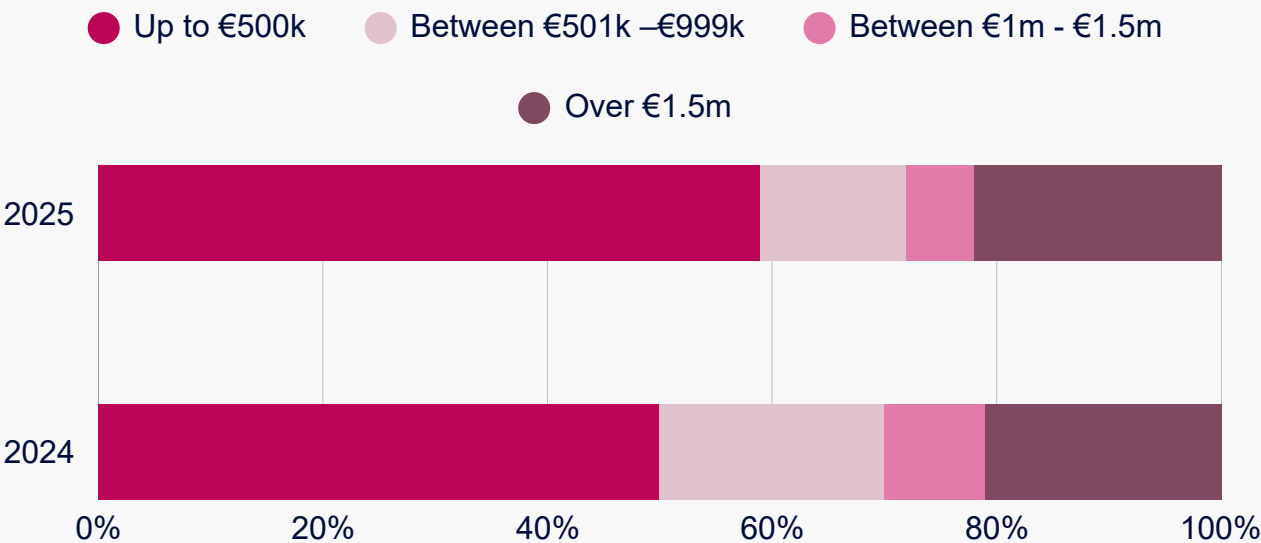


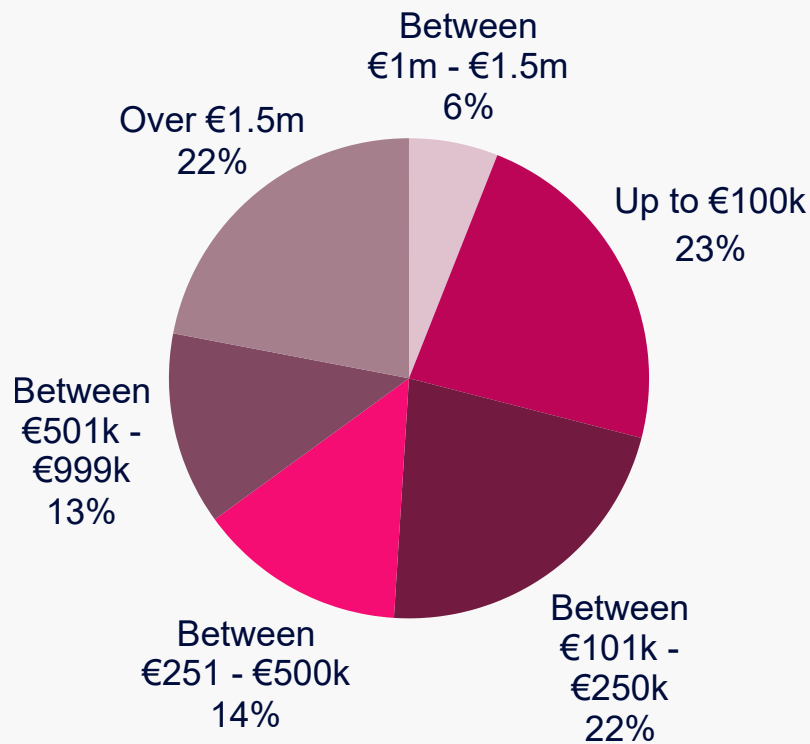
Q4: What was the total budget received by your department for business events (including trade show budgets & subvention fund) in 2025?

The distribution of business events budgets remained weighted toward lower funding categories in both years, with the proportion of organisations operating with budgets below €500k increasing from 2024 to 2025. While higher-budget organisations remained present, the overall structure suggests continued financial concentration at the lower end of the market rather than significant upward movement in funding levels alongside continued variation by geography and destination type.

The results provide further insight into the budget received for business events in 2025, showing that lower budget categories remain dominant, with a combined **59%** of respondents reporting budgets of less than €500k (compared to **50%** in 2024), including **23%** with less than €100k and **22%** between €101k–€250k.

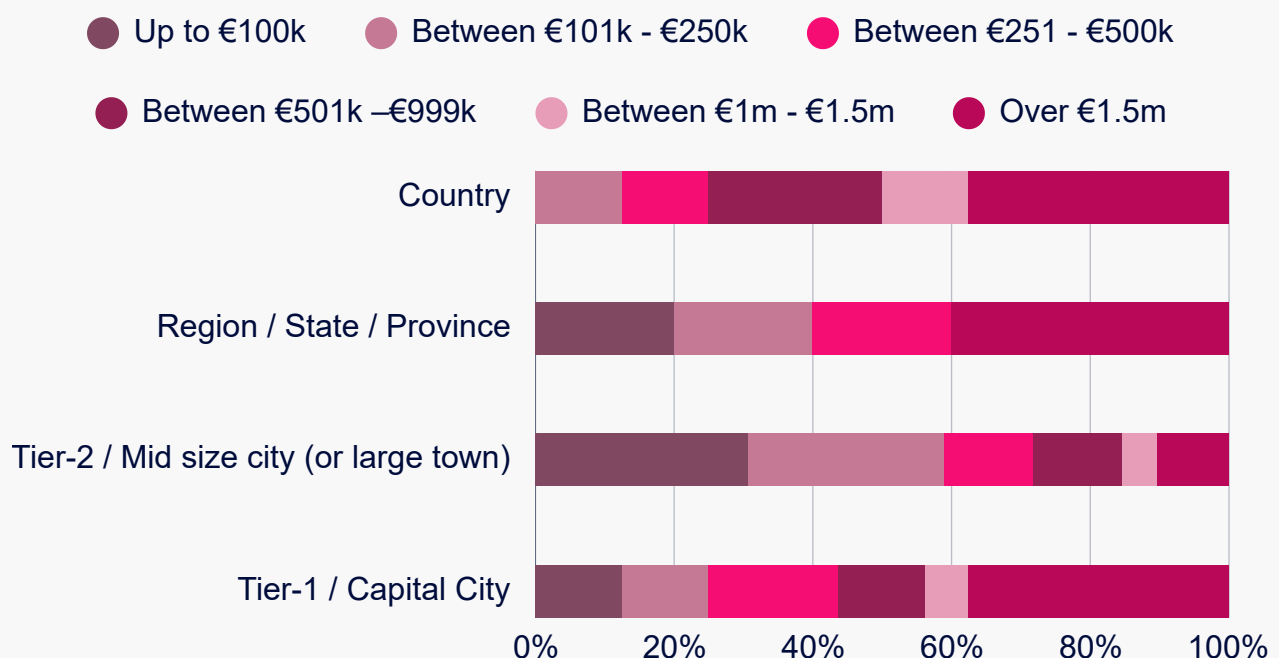
At the higher end, budgets of over €1 million remain broadly consistent with previous findings, accounting for **28%** of responses compared to **30%** in 2024, indicating little overall change at this level.





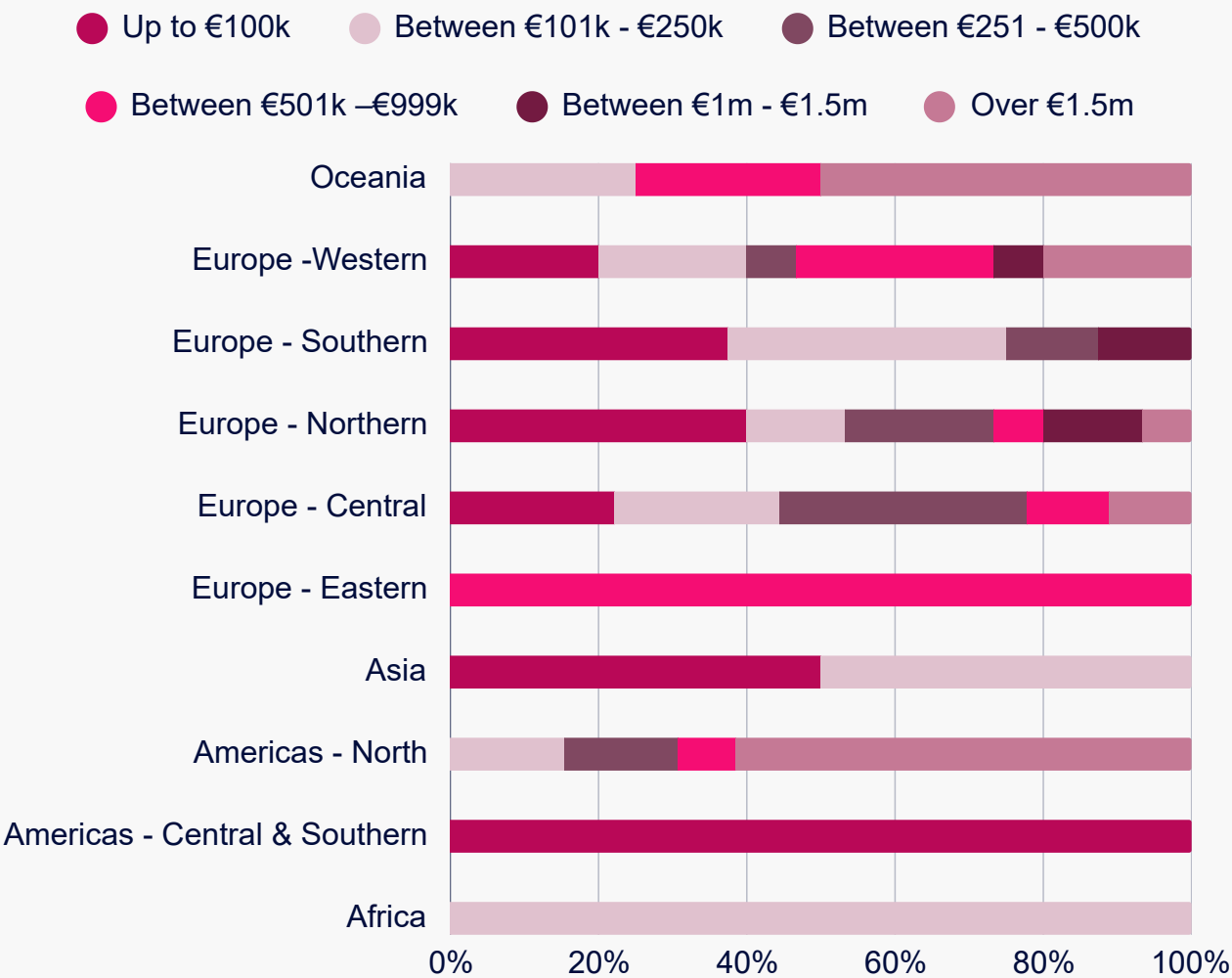
Analysis by destination type reflects an unsurprising clear structural funding hierarchy across the sector, with Tier-2 destinations more concentrated within lower and mid-range budget categories.

What is particularly interesting, however, is that the findings suggest that comparatively modest budgets do not necessarily limit competitiveness or growth potential. Several Tier-2 destinations nevertheless report strong growth trajectories and significant economic value generation, indicating that affordability, sector alignment, strategic positioning, and value-for-money propositions may increasingly offset traditional scale advantages.



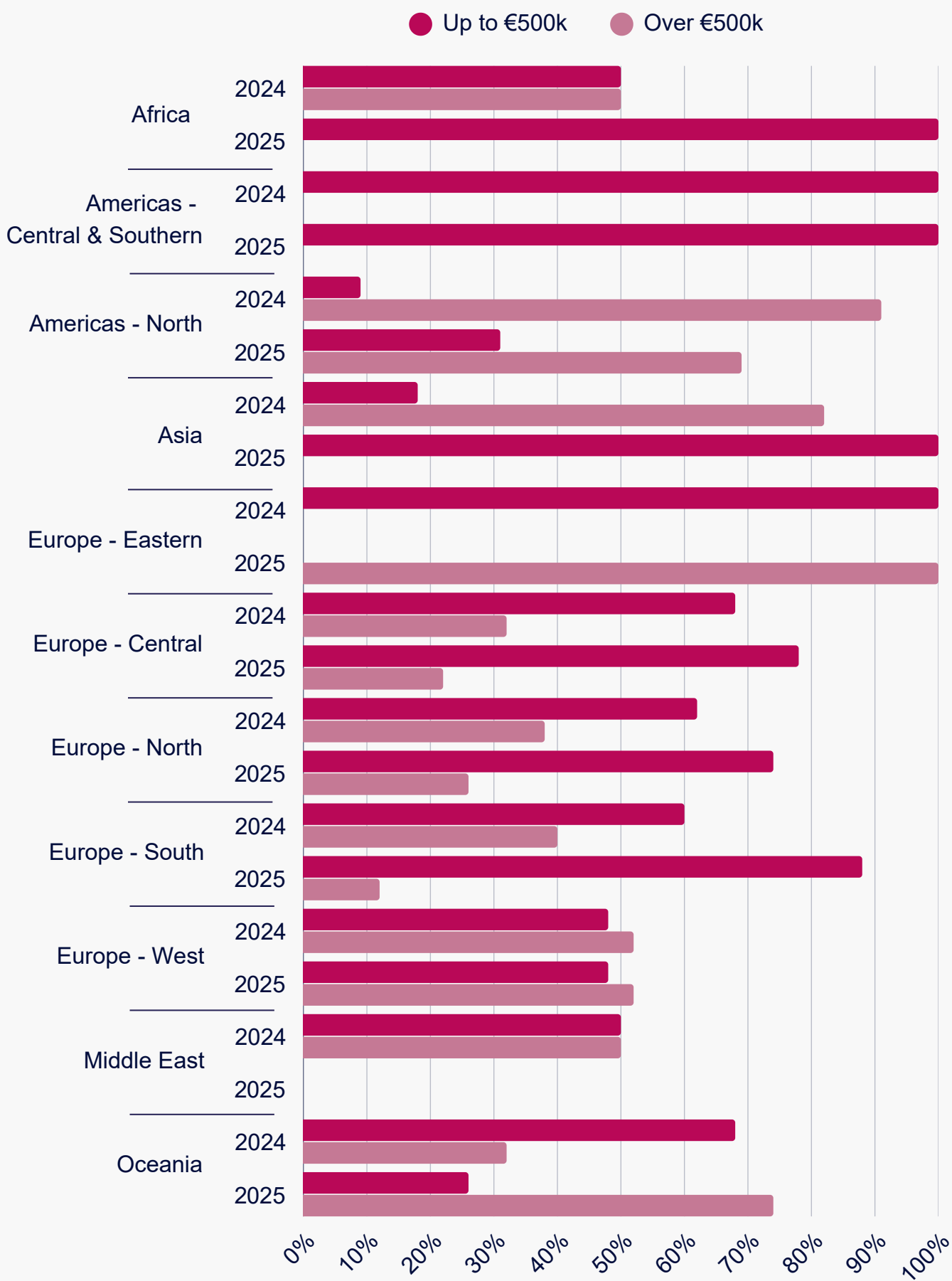
A regional breakdown of budgets highlights clear differences in funding profiles. Respondents from regions such as the Americas (Central & Southern) and Asia are heavily concentrated in lower budget bands, with limited or no representation in higher Tiers.

In contrast, Western and Northern Europe, along with North America, show a more balanced distribution across budget levels, including stronger representation in higher funding categories. Some regions display highly concentrated patterns, such as Eastern Europe and Africa, reflecting limited spread across budget bands.



These patterns are broadly consistent with 2024, reinforcing persistent regional disparities in funding levels. Consistent regions include Central & Southern America, North America, Central, Northern and Western Europe.

While significant differences are seen in Africa, Asia, Eastern and Southern Europe, and Oceania. No comparison can be made for the Middle East since there was no data collected from this region this year.

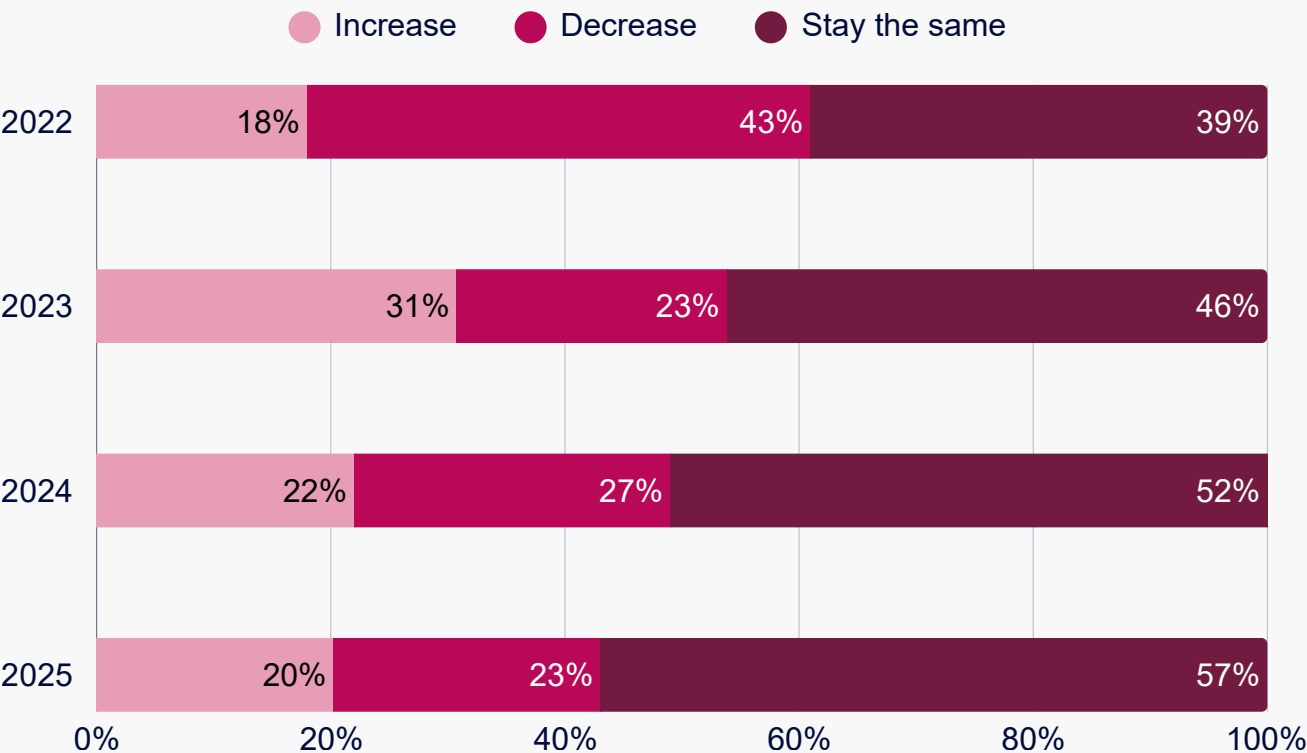


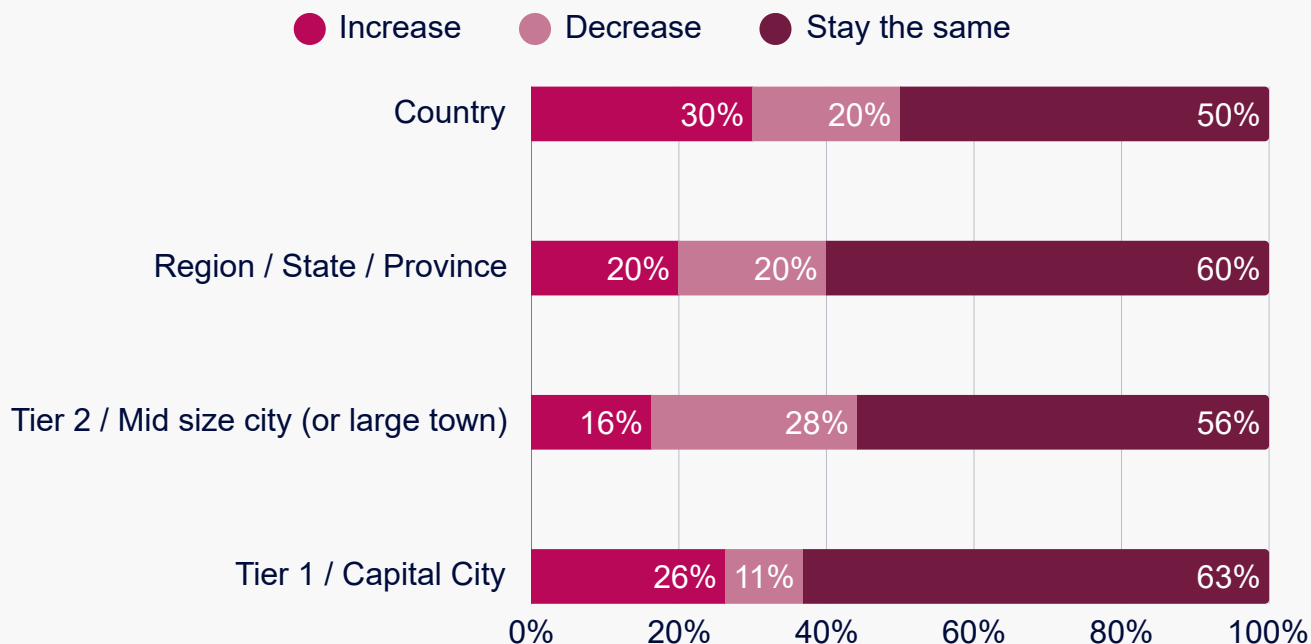
Q5: Compared to 2024 did you see a change in your budget received for business events (including trade show budgets and subvention fund) in 2025?

Year-on-year data indicates a shift towards greater budget stability, with fewer destinations reporting decreases and a similar proportion reporting increases compared to last year, although still below peak growth levels seen in 2023. However, budget decreases were more commonly reported among destinations operating with budgets of €500k or less, highlighting continued vulnerability among lower-funded organisations. Fewer regions report marked decreases, while a larger number demonstrate either stability or moderate growth.

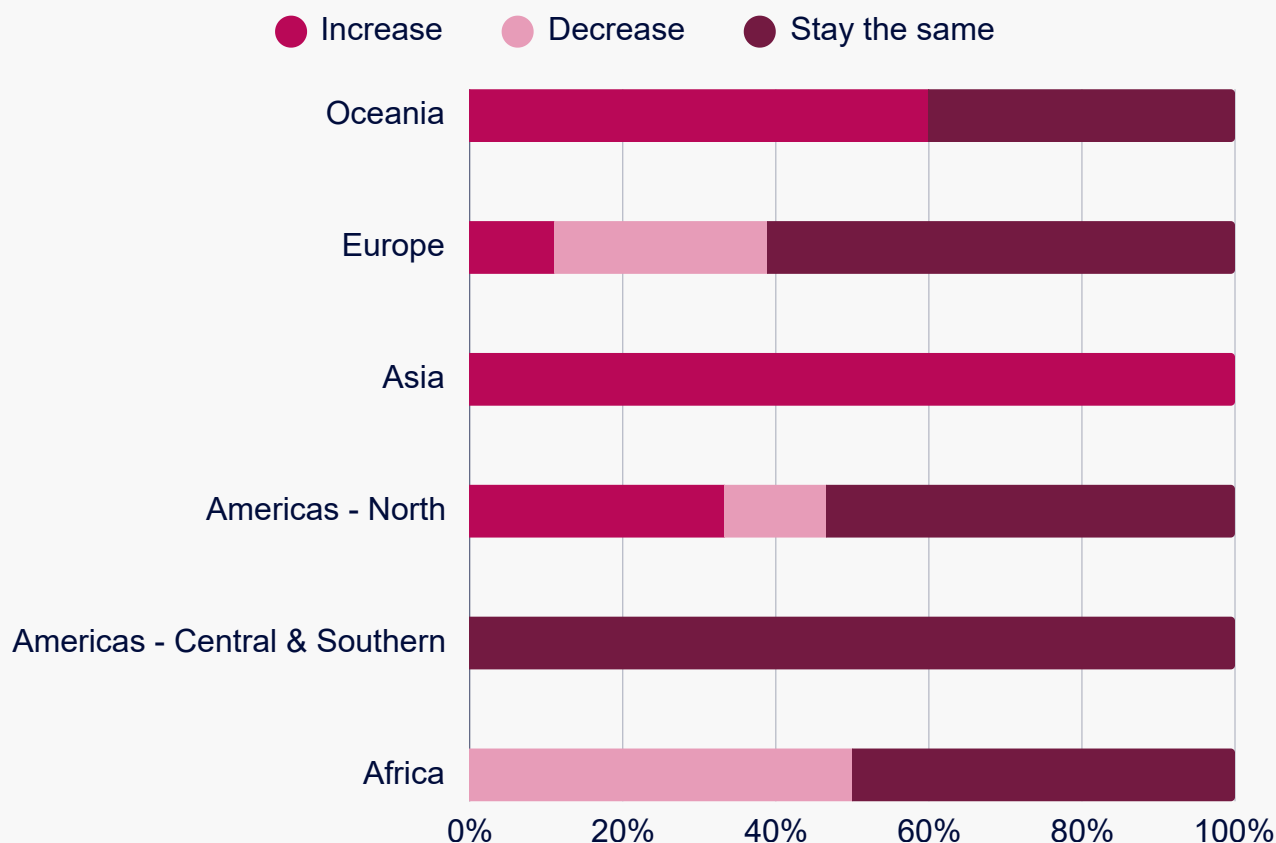
The responses to this question indicate a more settled funding environment, with reduced volatility and more consistent budget conditions across most geographies.

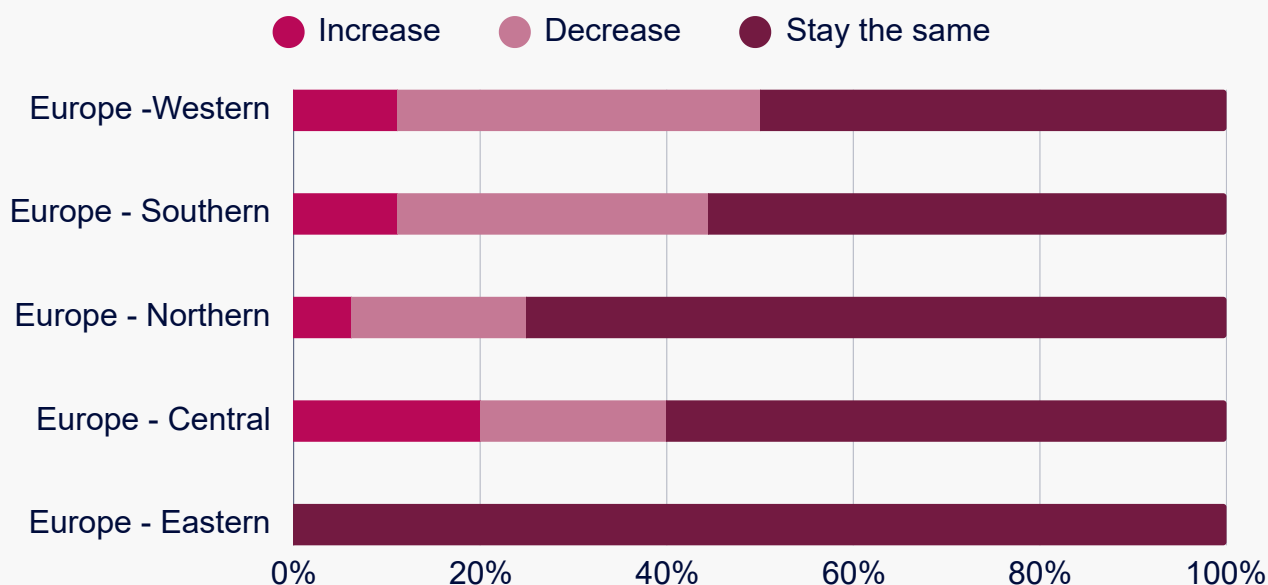
Differences between destination types remain evident. Tier-1 destinations tend to report higher levels of budget stability and increases, while Tier-2 destinations are more likely to report limited growth and a higher incidence of budget reductions.



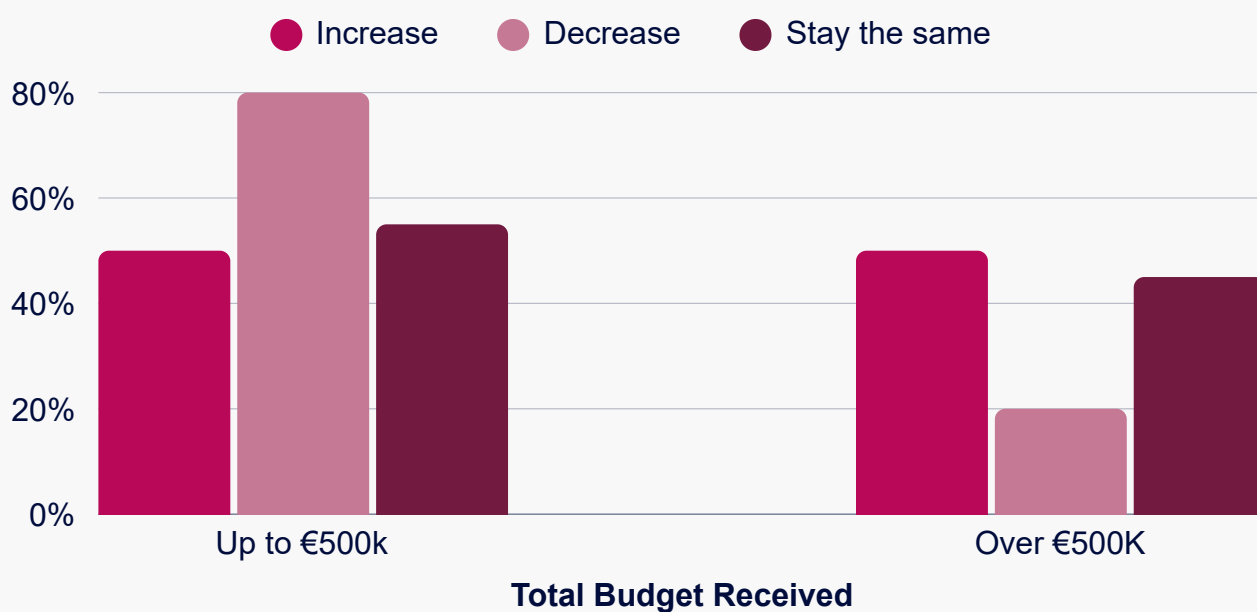


Geographically, the results from the 2025 data suggest greater stability or improvement across several regions, with fewer budget reductions than in the more polarised 2023–2024 period. Notably, all Asia respondents reported an increase in budget. Africa is the main exception, with responses split between budgets staying the same and decreasing.





When comparing regions reporting increases versus decreases in their budgets, the most striking pattern is that decreases are considerably more common among regions with budgets of €500k or less, while rates of increase remain relatively similar across both budget groups.



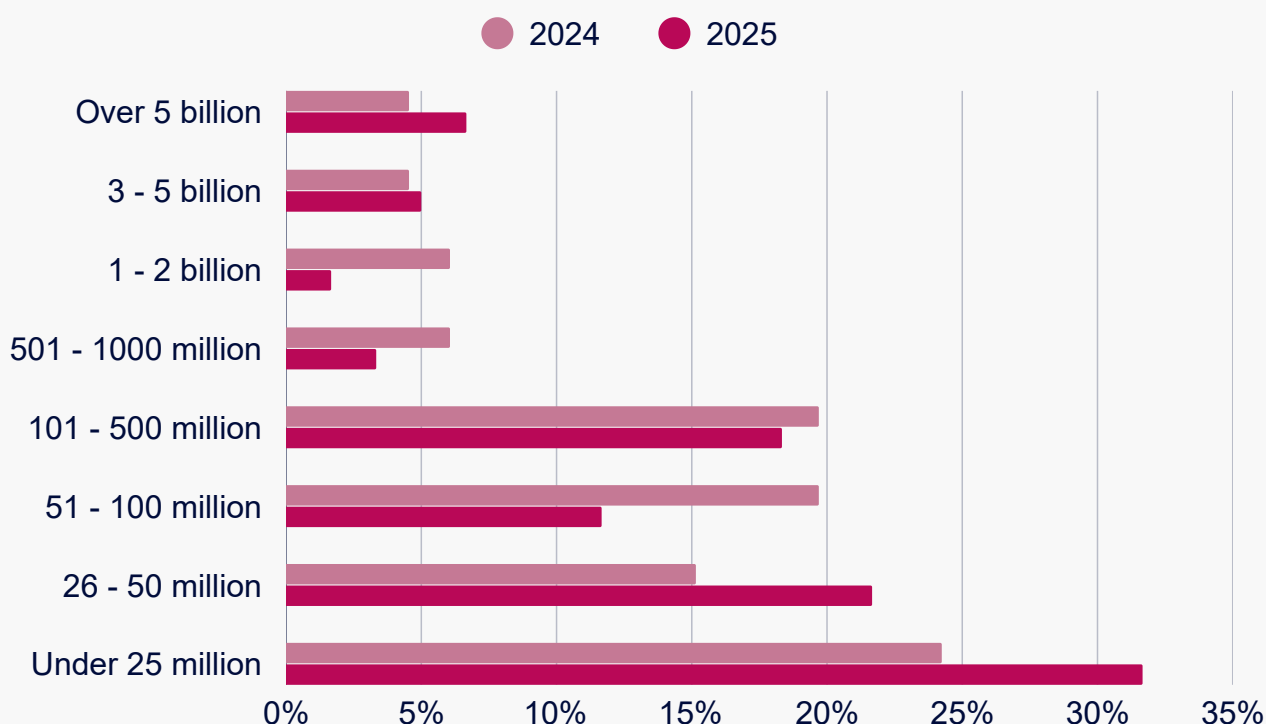
Although Question 4 suggests a continued concentration of organisations within lower budget bands in 2025, the findings from Question 5 indicate that year-on-year volatility has reduced, with most respondents reporting budgets had either stabilised or increased modestly. This suggests that while funding levels remain structurally constrained across much of the sector, the pace of budget decline appears to have eased compared to the more volatile post-pandemic period

Q6: In terms of direct economic value (i.e. not including long term legacy or impact) how much value (€) would you attribute to business events to your destination in a 12-month period?

Overall direct economic value generated by business events remains substantial, but unevenly distributed across destinations, broadly consistent with 2024. Over two thirds report annual economic value of over €25million, while a smaller group continue to generate substantially higher levels of economic value. The findings show that even comparatively modest budgets for business events can be associated with substantial economic impact.

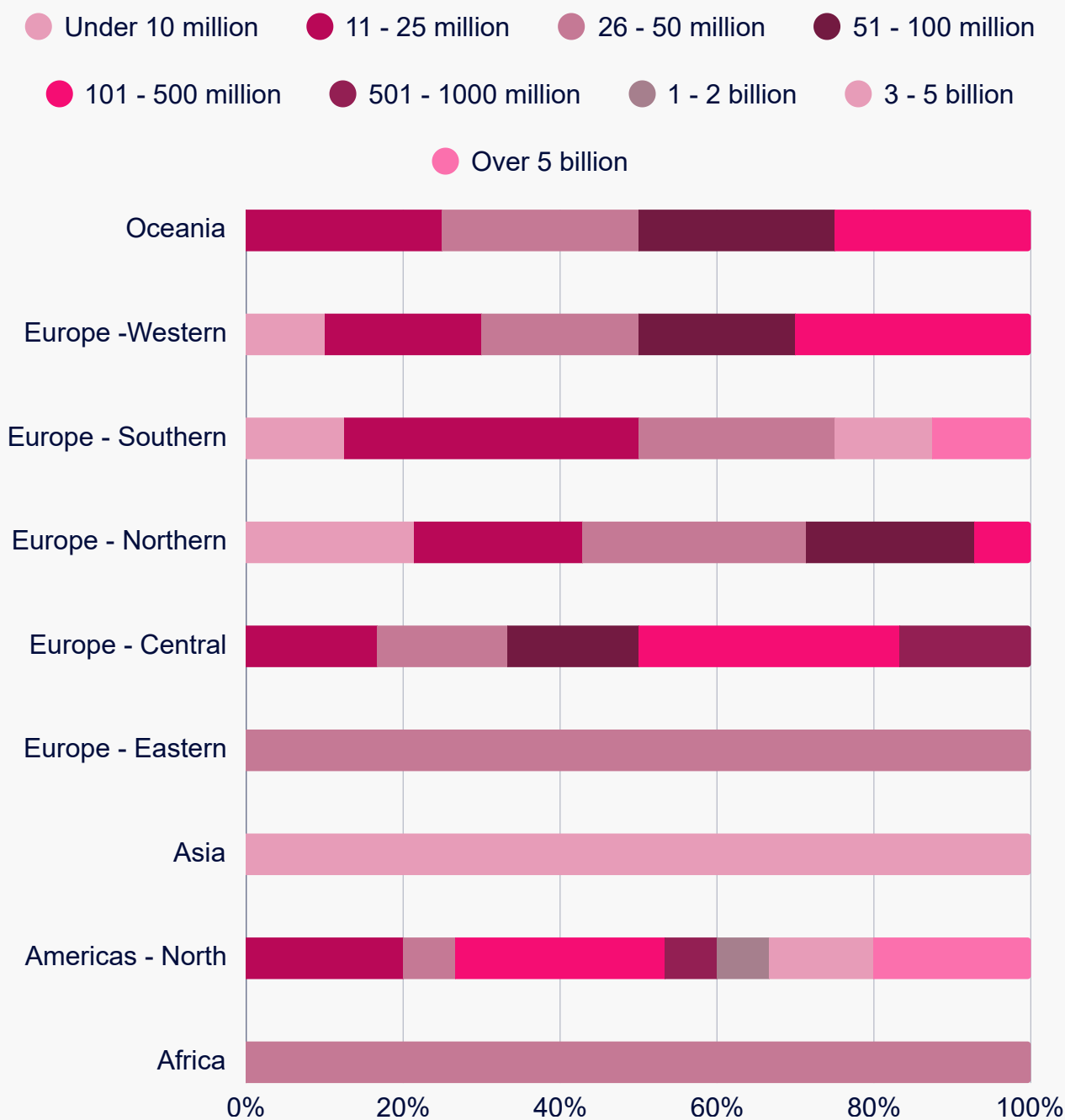
In 2025, **68%** respondents reported annual economic value of over €25million. Although higher values were less common, there was still a substantial proportion of respondents reporting economic value above €500 million, including **7%** in the €5 billion-plus range.

2025 introduced more detailed lower-value categories within the 'Under €25 million' band, identifying that **10%** of respondents reported annual economic value below €10 million and providing greater granularity at the lower end of economic impact reporting for future comparison. Compared to 2024, this represents a broadly consistent distribution, with economic impact continuing to be concentrated in lower and mid-range bands, and no significant shift toward higher-value outcomes.



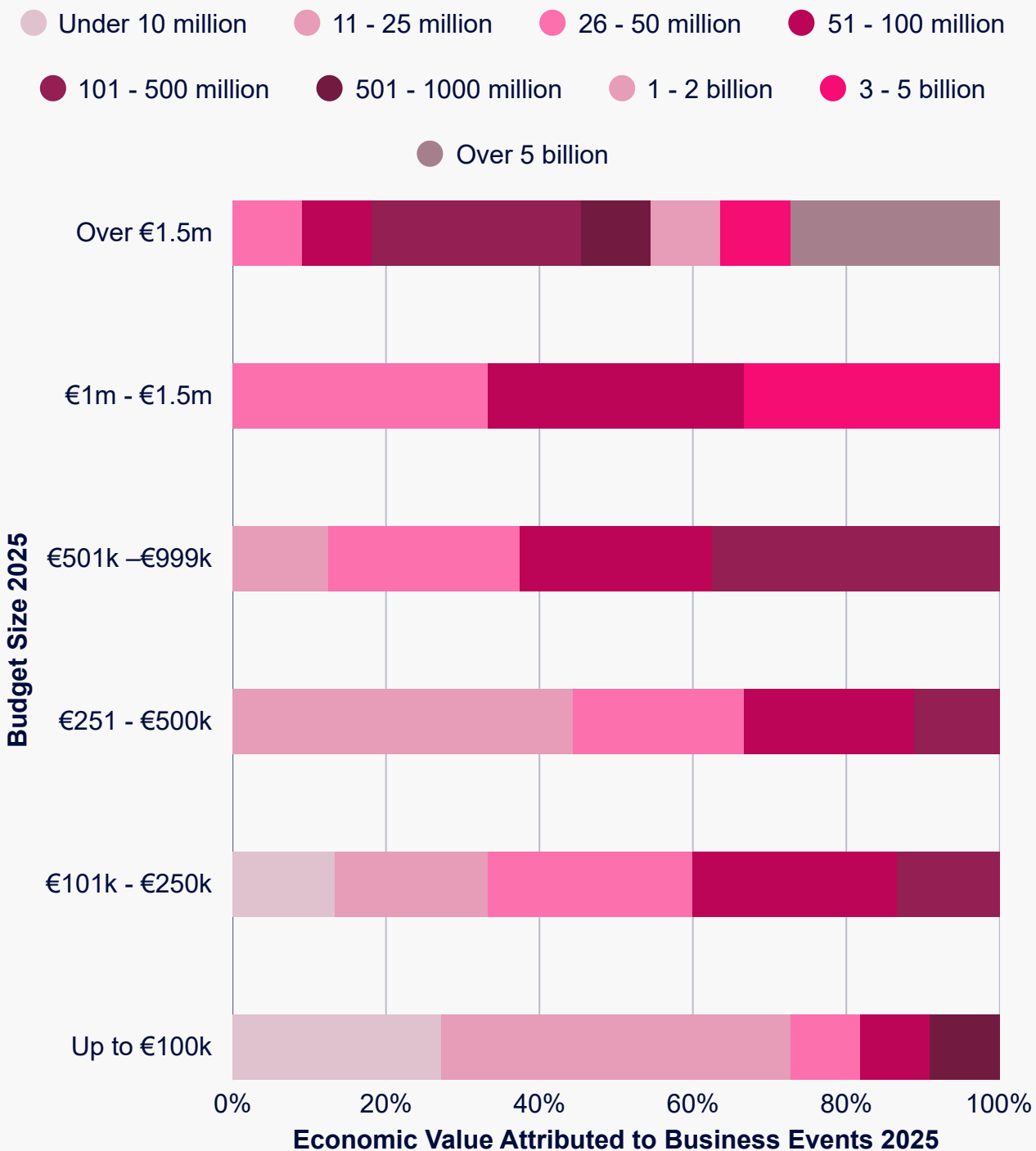
At a regional level, variation in economic value remains evident across destinations. Parts of Europe and North America show a broad spread across economic value categories, including representation within some of the highest-value bands, while other regions such as Asia, Africa and Eastern Europe are more concentrated within the lower and mid-range categories.

Overall, the findings highlight the significant economic contribution generated by business events across a diverse range of destination types and geographies.



Among destinations with budgets of €500k or less, **86%** reported annual direct economic impacts exceeding €10 million. All destinations with a budget above €500k reported direct economic value of over €10 million, with a third reporting over €1 billion.

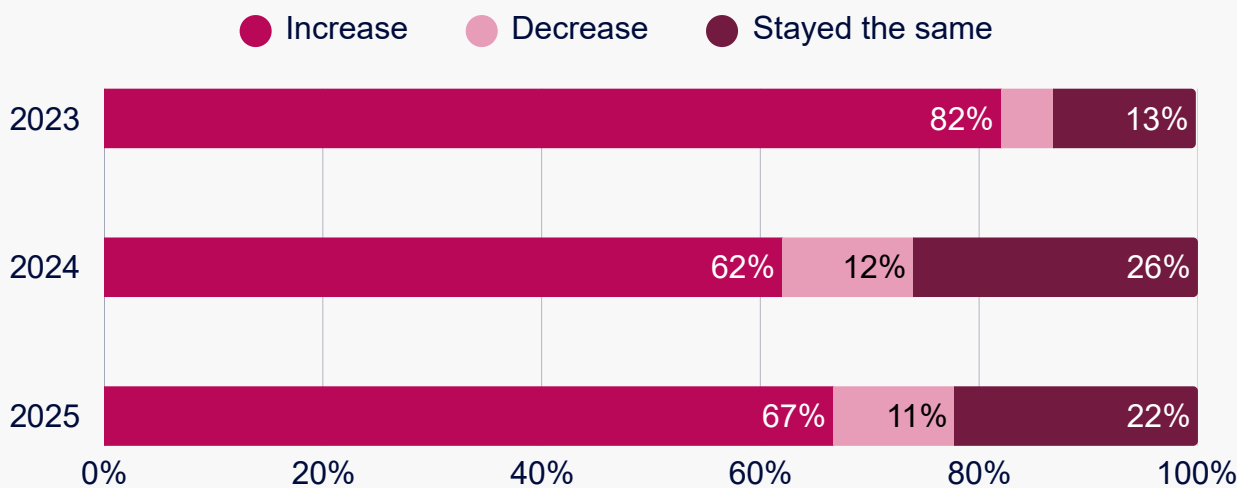
Although higher-funded organisations generate the largest economic returns, even relatively modest funding levels are associated with substantial economic impact, highlighting the strong value contribution of the sector.



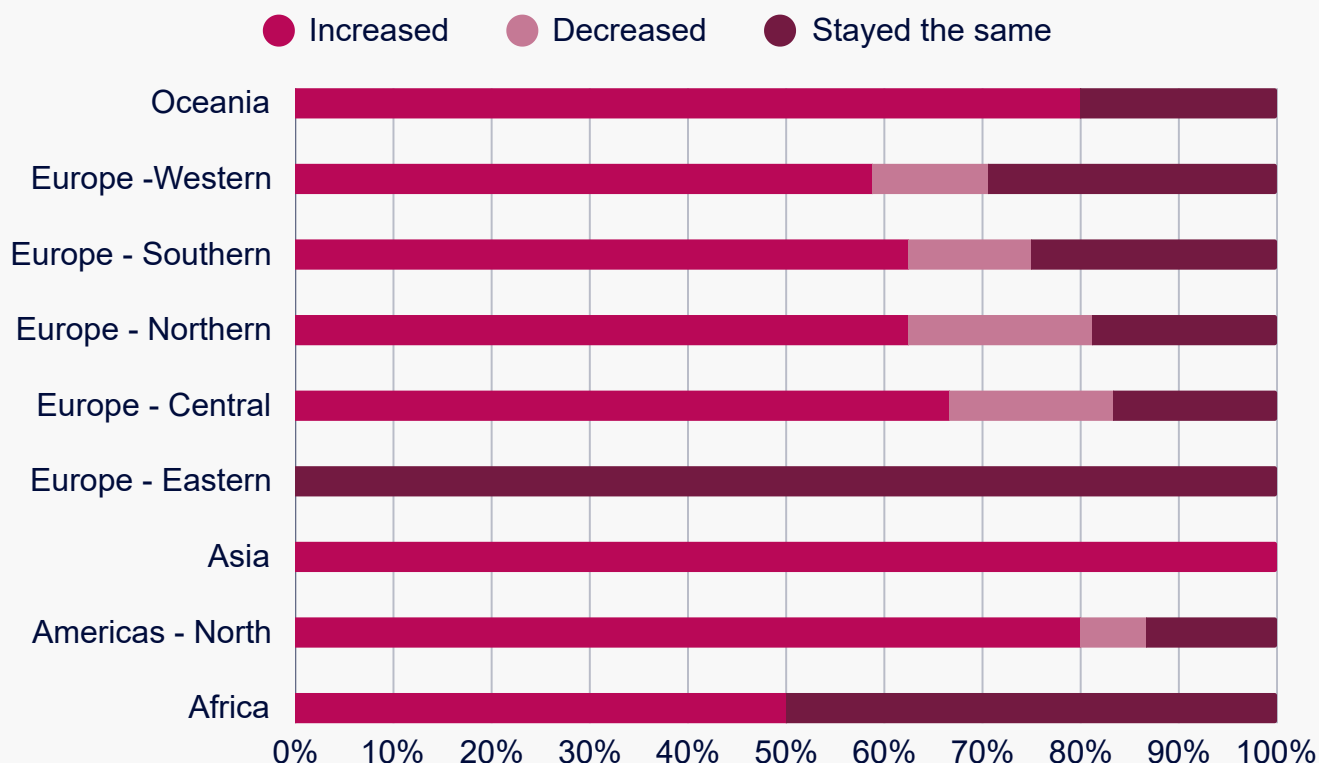
Q7: In 2025, has this direct economic value (i.e. not including long term legacy or impact) changed since 2024?

Economic sentiment improved slightly in 2025, with 5% more respondents reporting increased direct economic value compared to 2024. This improvement occurred despite most respondents reporting stable or reduced budgets, while 70% of those who felt their teams were too small still reported growth in direct economic value. This highlights the sector’s resilience but also suggests that constrained capacity may limit the ability to sustain growth over time.

Despite 80% reporting that budgets have remained the same or decreased since 2024 (see question 5), the proportion of respondents reporting an increase in economic value has risen by 5% and the number showing a decrease has decreased very slightly signalling a partial recovery in positive sentiment, although still below peak levels seen in 2023.



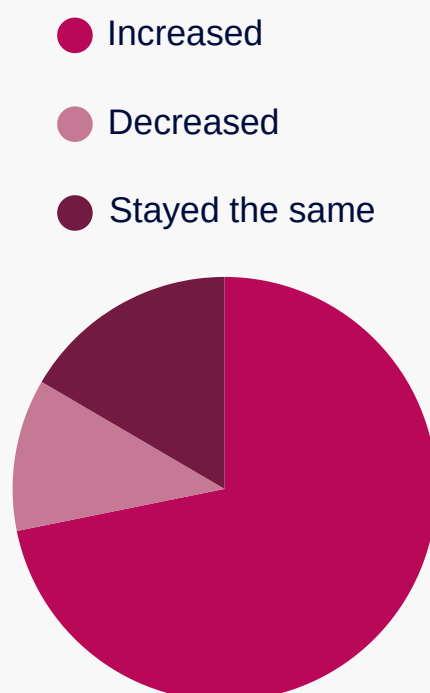
Although Question 6 shows that the overall distribution of reported economic value remains broadly similar to 2024, the findings from Question 7 suggest improving sentiment, with more destinations reporting increases in economic value and fewer reporting declines. This may indicate that some destinations experienced growth between 2024 and 2025, even if this is not yet reflected in a significant shift in the overall distribution of economic value bands.



At a regional level, sentiment varies considerably. Asia, Oceania and North America show a strong skew towards reported improvement, with the majority of respondents citing increases in economic value. In contrast, European regions present a more mixed picture, with a combination of increases, decreases and stable responses across Western, Northern, Southern and Central Europe. Some regions display highly concentrated responses, such as Eastern Europe who reported their economic value had stayed the same.

Furthermore, among respondents who felt their teams were too small, sentiment regarding direct economic value was strongly positive. The majority (70%) of these respondents reported that direct economic value had increased from 2024 to 2025, while only 16% said it had stayed the same.

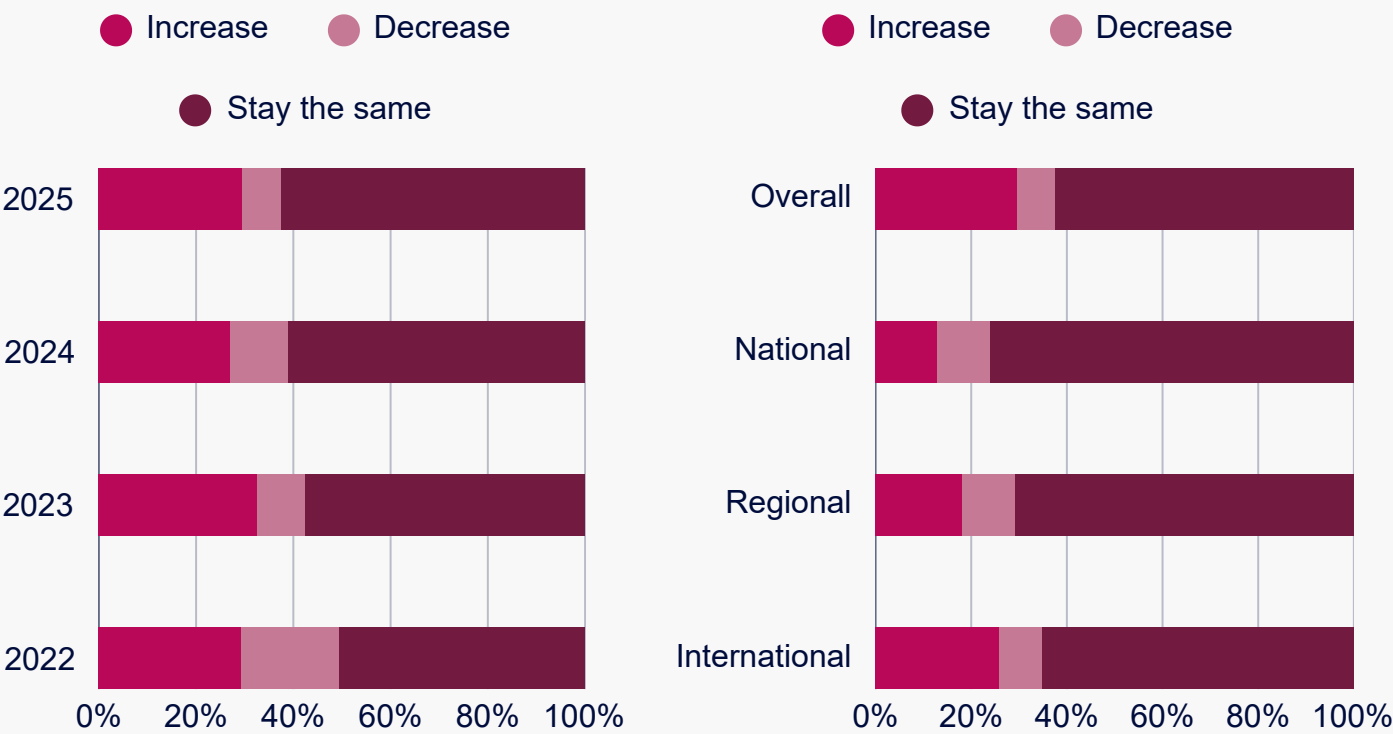
This suggests that, despite concerns around team size, most respondents still perceived growth in direct economic value over the period although constrained team capacity may limit future growth potential or the ability to sustain these outcomes over time.



Q8: Compared to 2024 have you seen a change in your bid or subvention fund in 2025?

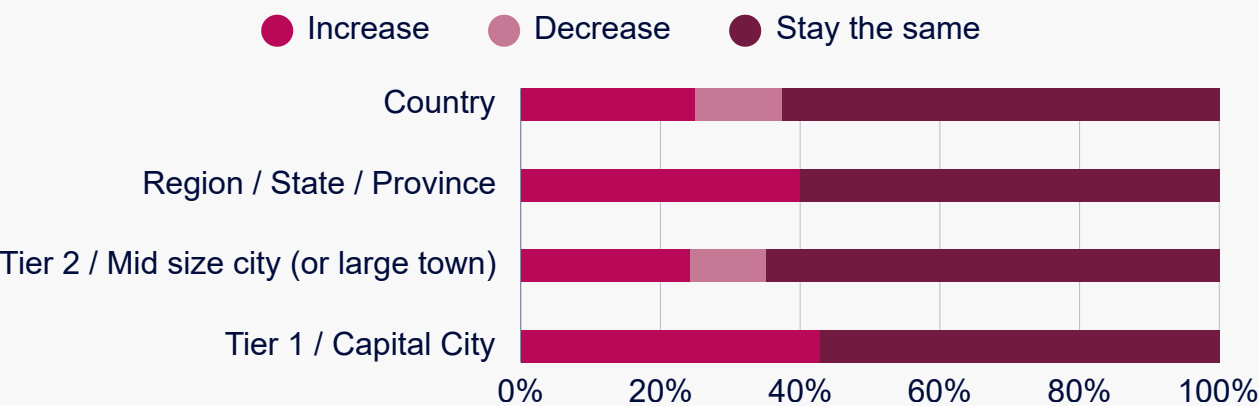
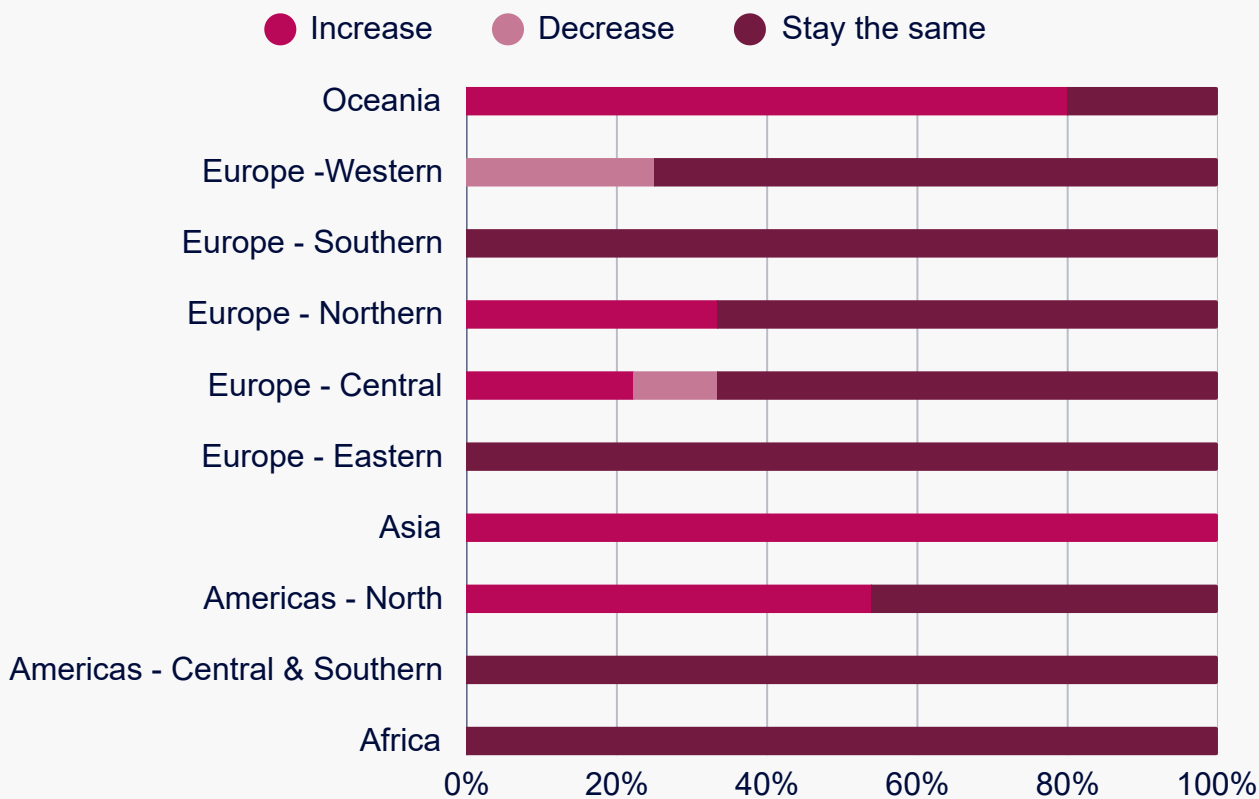
Overall, the data indicates that bid and subvention funding has largely stabilised, with some gradual return of positive momentum and reduced uncertainty. However, variations remain across regions and destination types, highlighting an uneven funding landscape for business events.

Funding continues to show a high degree of stability, with around **63%** of respondents reporting no overall. However, there is evidence of a gradual improvement in funding conditions over time. The proportion of respondents reporting increases has remained relatively stable, at around **30%** in 2025, and the proportion citing decreases has declined, indicating reduced downward pressure on funding.



Regional differences remain evident in 2025. Asia and Oceania show strong positive momentum, while North America also reflects a generally positive position, with a notable proportion reporting increases alongside stability. In contrast, parts of Europe demonstrate a more stable position. In Southern and Eastern Europe, **100%** of respondents reported stability as well as around a third of respondents in Western, Central and Northern Europe.

In terms of destination type, the overall pattern continues to be dominated by stability, with the majority of respondents across all categories reporting no change in funding. Regional and Tier-1 level destinations show a higher proportion of increases (just above **30%**), compared to the other types, with country and Tier-2 reporting the highest decrease in subvention, all of which are in Western or Central Europe.

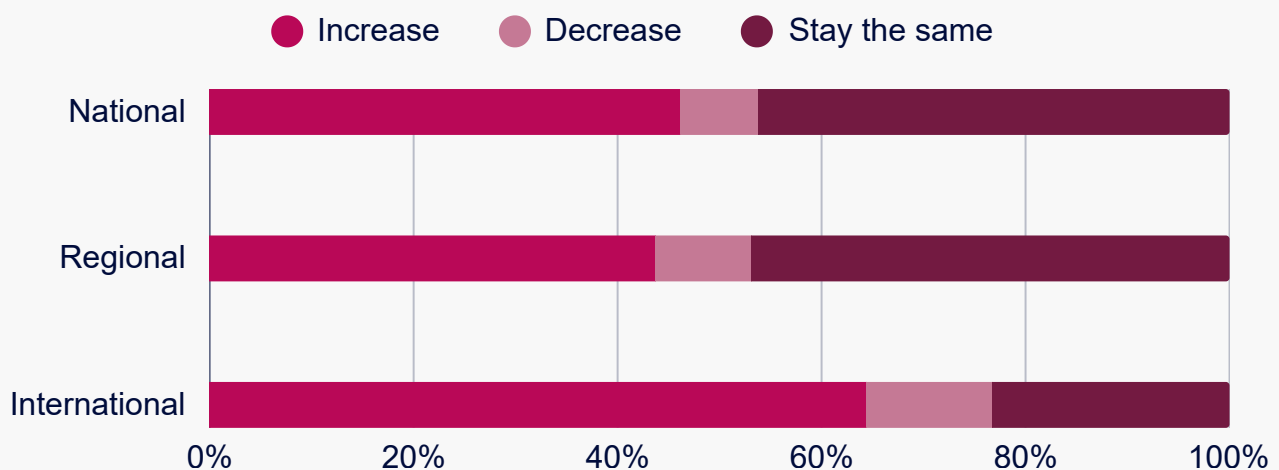


Q9: Compared to 2024 figures, have you seen a change in the volume of your business events this year? (International being worldwide participation, regional being local region participation and national being domestic participation i.e. from your own country)

Overall, the data suggests that while event volume in 2025 had not returned to the peak growth levels seen in 2023, the environment has become more stable, with fewer decreases and a gradual recovery in positive responses. Growth is now more concentrated in international activity, while national and regional event volume levels remain steady but less dynamic. The findings also suggest that respondents who felt their teams were too small were nevertheless experiencing growth in event volume, indicating a potential lag between growing activity levels and increases in staffing capacity.

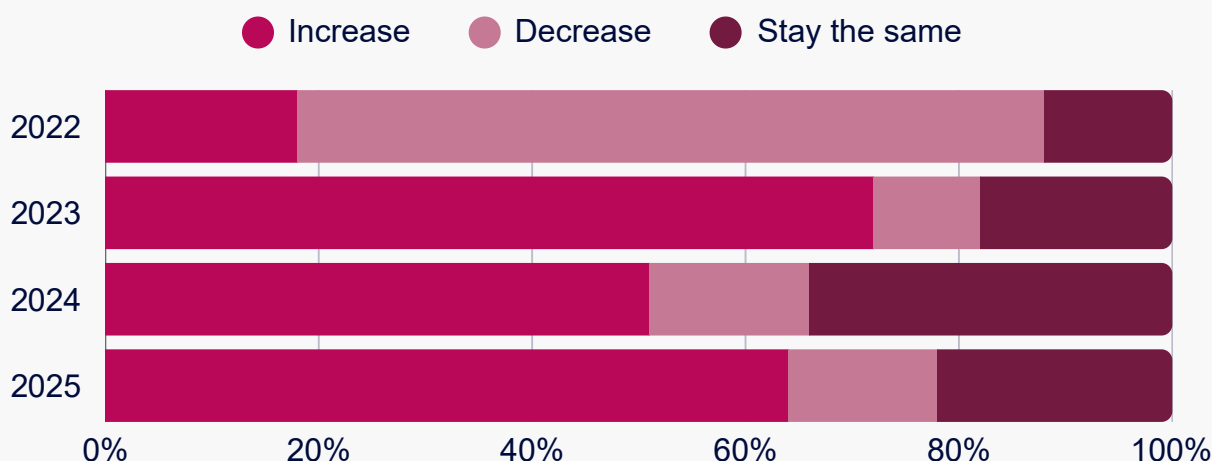
The volume of business events in 2025 largely remained stable or increased across all respondents. International event volume continues to show the strongest growth, with approximately **64%** reporting increases (plus **23%** that have remained the same), marking a notable rise compared to 2024. The trend is also reflected across destination types, with Regions and Tier-2 destinations reporting the highest levels of stability and growth in international event activity compared to other destination categories.

National and regional event volume also present a positive picture for 2025, with approximately **90%** reporting increase or stability in the volume of events. Across all levels, the proportion reporting decreases is relatively low (below **12%**).

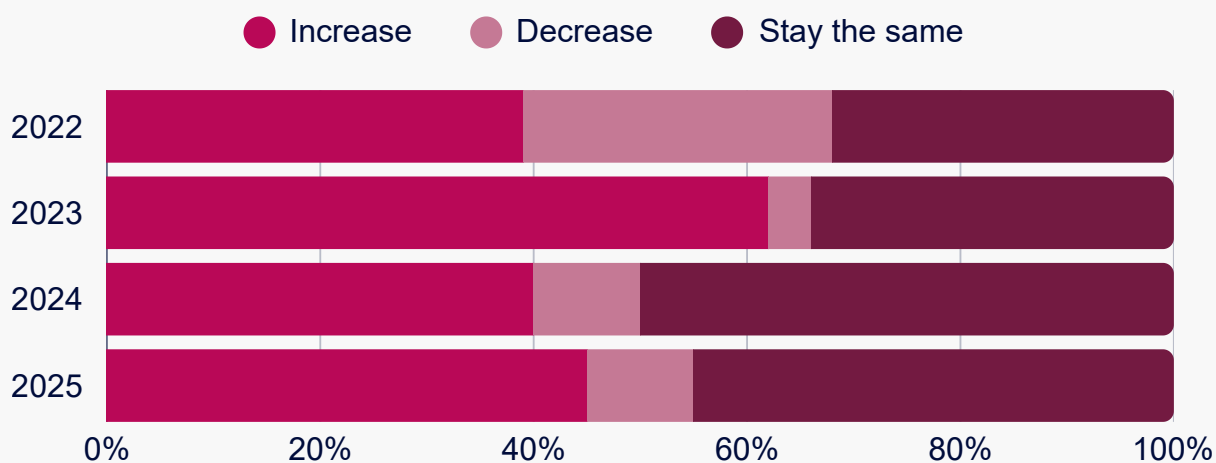


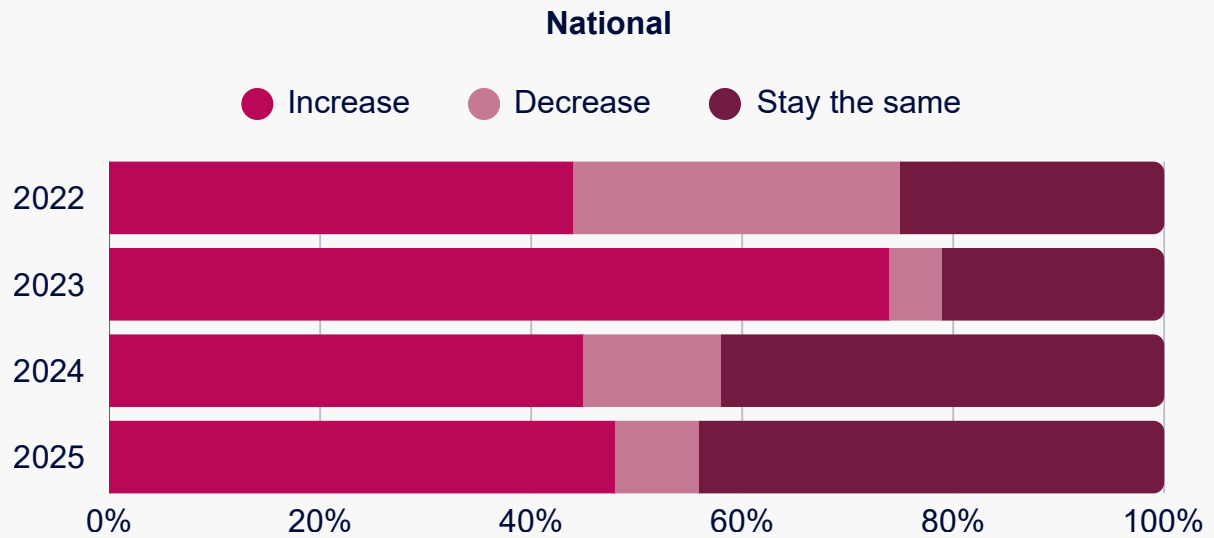
International event volume has experienced the greatest fluctuation year-on-year. Positive sentiment peaked in 2023, when around **70%** reported increases, before declining to approximately **45%** in 2024 and partially recovering to around **60%** in 2025. At the same time, the proportion reporting decreases has fallen substantially compared to 2022, when it was the dominant response. Regional event volume has followed a more moderate trajectory, with increases peaking in 2023 (around **50%**), declining in 2024, and stabilising in 2025 at around **30–35%**. Stability has become more prominent over time, while decreases have reduced compared to earlier years.

International event volume

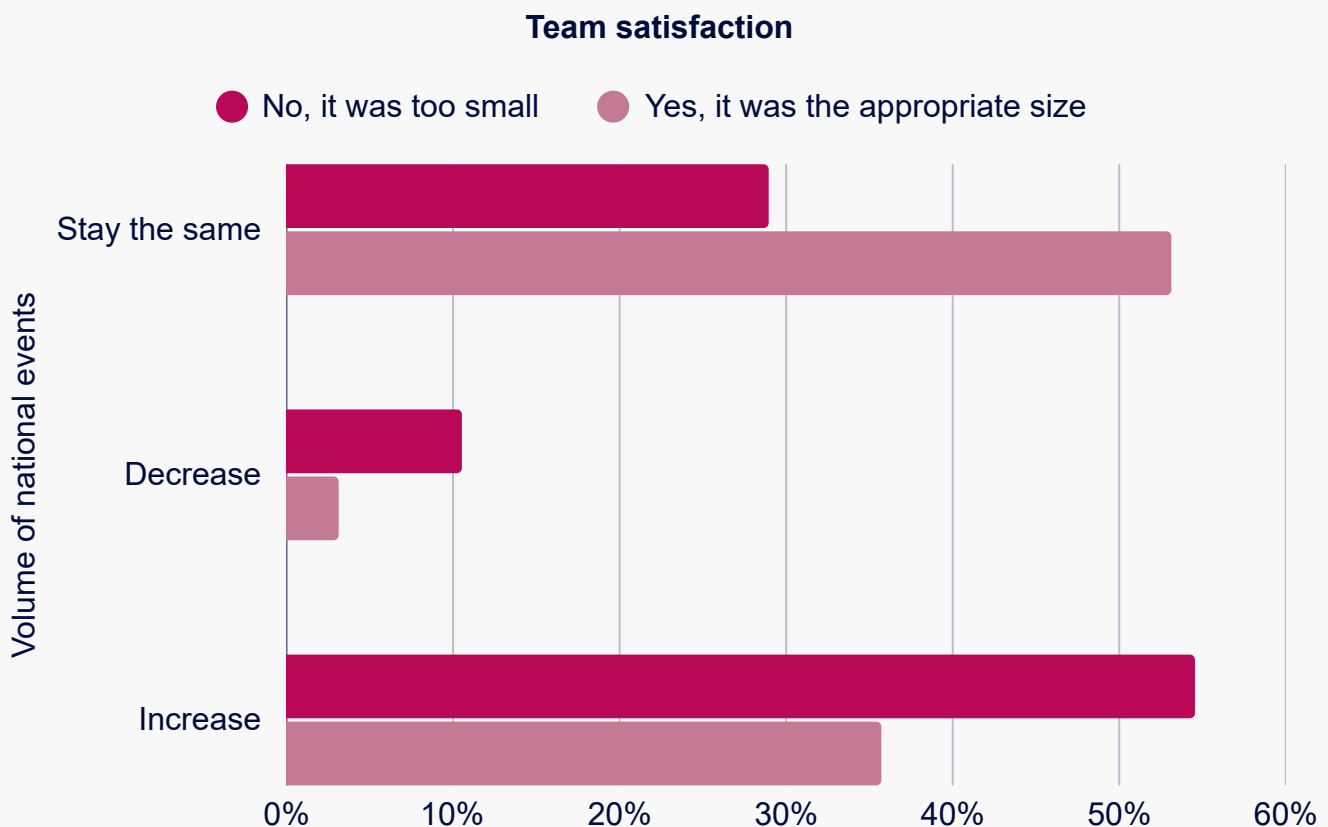


Regional event volume





Notably, increases in event volume were also reported by respondents who felt their teams were too small. This may suggest a lag between growing activity levels and corresponding staffing capacity. The trend is particularly evident at the national level, where more than half of respondents experiencing growth in event volume reported that their teams were too small to manage demand effectively.

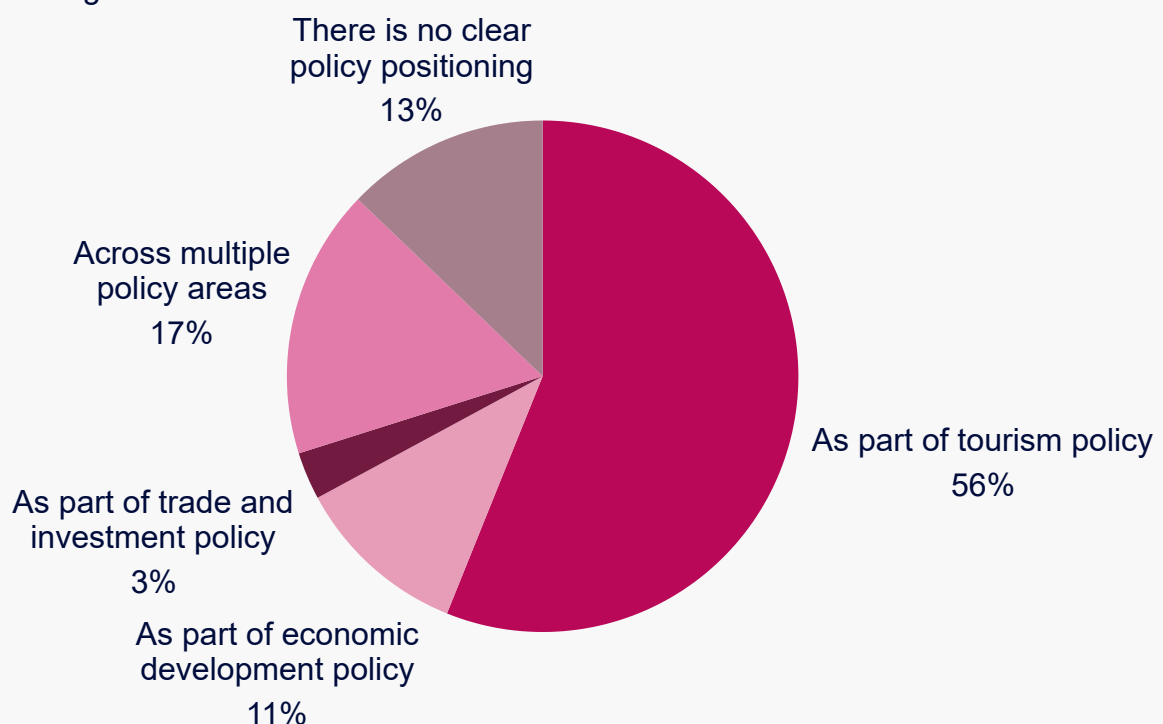


Q10: A core tension across previous TBOE reports has been that business events are still framed as tourism, despite broader value. How are business events primarily positioned within government in your destination?

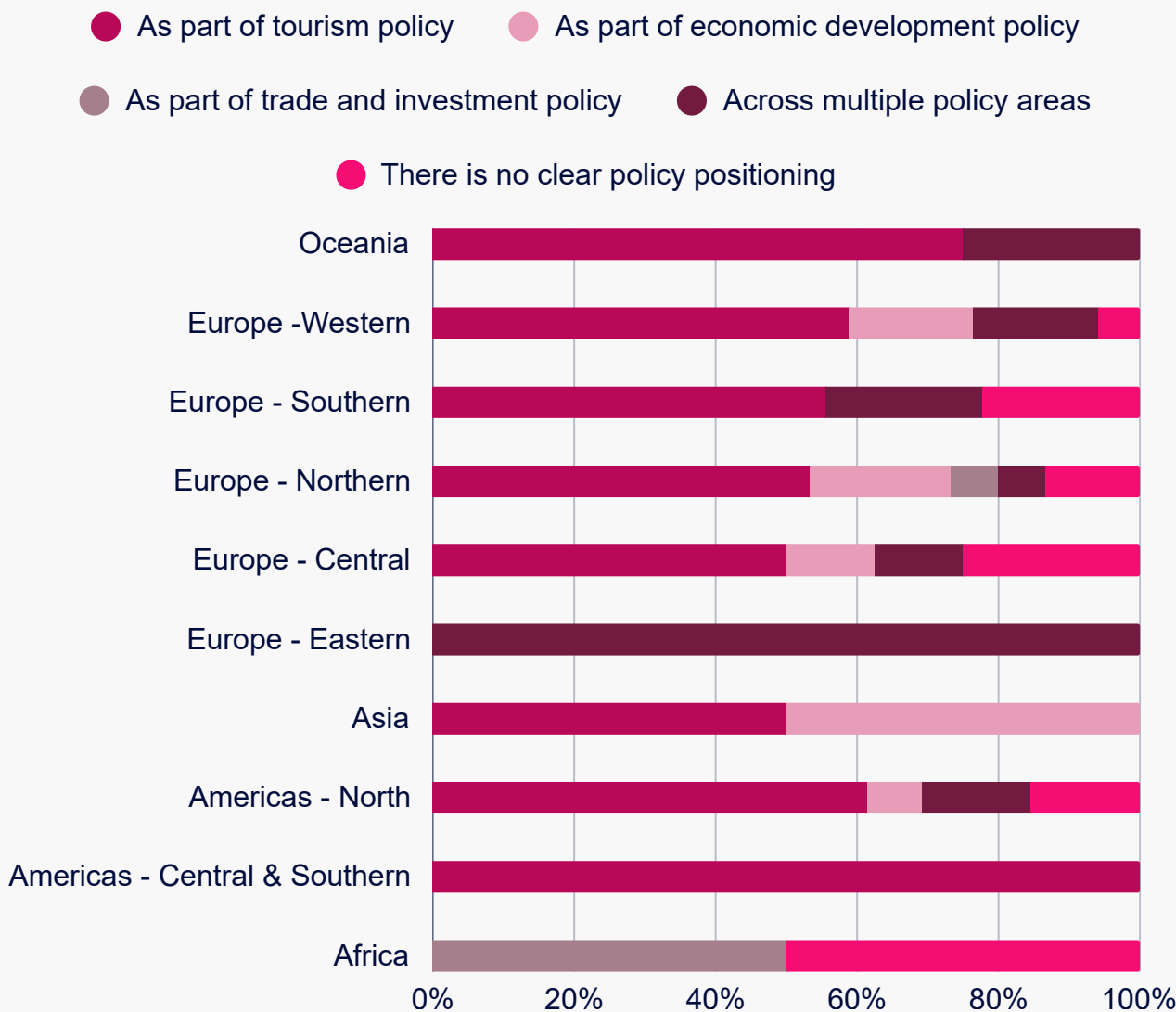
Business events continue to be primarily positioned within tourism policy, despite their wider economic, trade, innovation and place-development value. While some destinations are adopting more integrated approaches across economic development and multiple policy areas, this shift is not yet widespread. Cross-analysis suggests that policy positioning may also be associated with differences in funding levels and reported economic value.

Most respondents report that business events are primarily positioned as part of tourism policy within government (**56%**). A similar question was asked in 2023 and in comparison, the data suggests tourism policy has remained the largest category, though higher than in 2023 (**43%**).

While economic and policy-related positioning remains important, the current results indicate a more varied and integrated approach, with some destinations positioning business events across multiple policy areas rather than within a single framework. Trade and investment continue to represent a smaller proportion of responses, consistent with earlier findings.

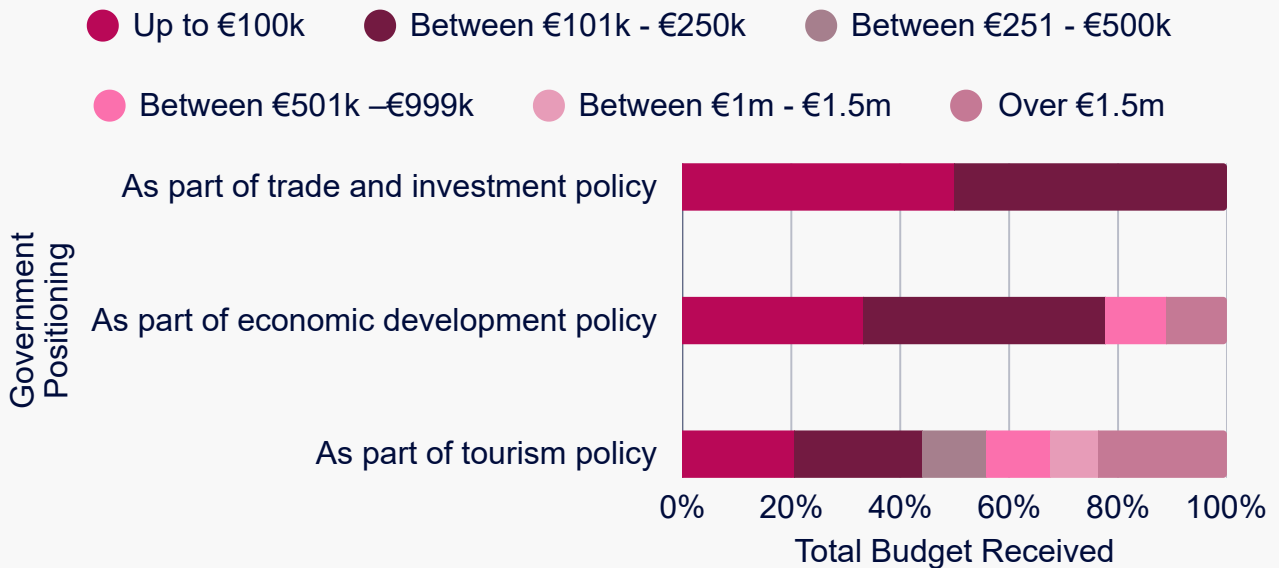


This pattern is fairly consistent across the geographical regions, except Eastern Europe and Africa whose respondents did not position themselves under Tourism.



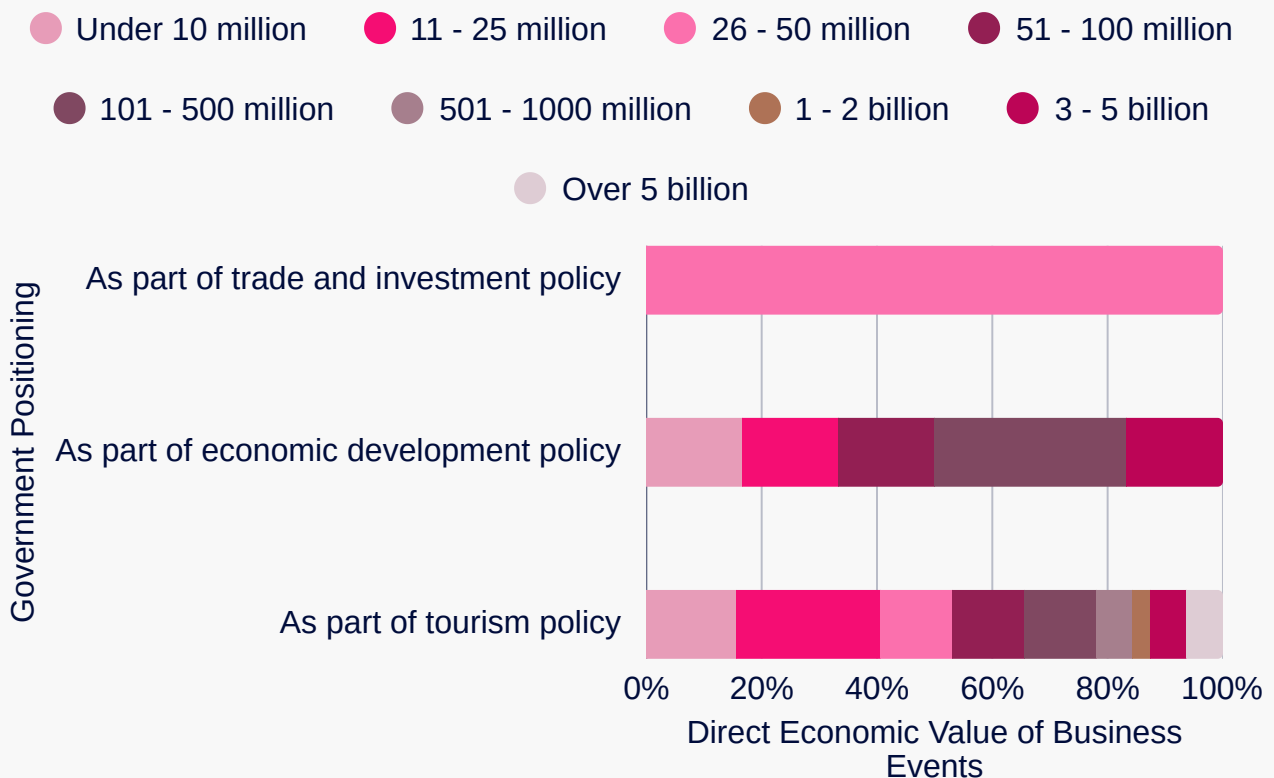
When cross referenced with the results from Question 4, and excluding respondents who identified their business events as positioned “across multiple policy areas” or where “there is no clear policy positioning”, all of respondents whose business events were positioned as a part of trade and investment policy, and over three quarters under economic development policy had budgets of less than €250k (but notably the remainder within economic and development policy receive over €250K).

Whilst those whose business events were positioned within tourism policy reported higher budgets, with more than half reporting budgets of over €250K and a third receiving more than €1.5M.



A similar trend emerged when responses were cross-referenced with direct economic value. All respondents whose business events activity was positioned solely within trade and investment policy reported direct economic value of between €26–50 million. In contrast, around half of respondents whose business events activity was aligned with economic development or tourism policy reported direct economic value exceeding €50 million.

This suggests that positioning business events within a broader tourism and economic development framework, and securing higher levels of funding, could be associated with higher levels of economic impact.



Q11: Rank the following in order of most effective when advocating for business events to government.

Economic growth and return on investment were identified as the most effective advocacy arguments, achieving the highest overall ranking among respondents. Other advocacy themes were viewed as comparatively less influential. The emphasis placed on other advocacy themes varies by geography.

'Economic growth and return on investment' are ranked top, with a weighted average score of 4.4 (out of 5). Other factors received lower but similar rankings. This suggests that economic arguments are considered the most persuasive when advocating for business events to government.



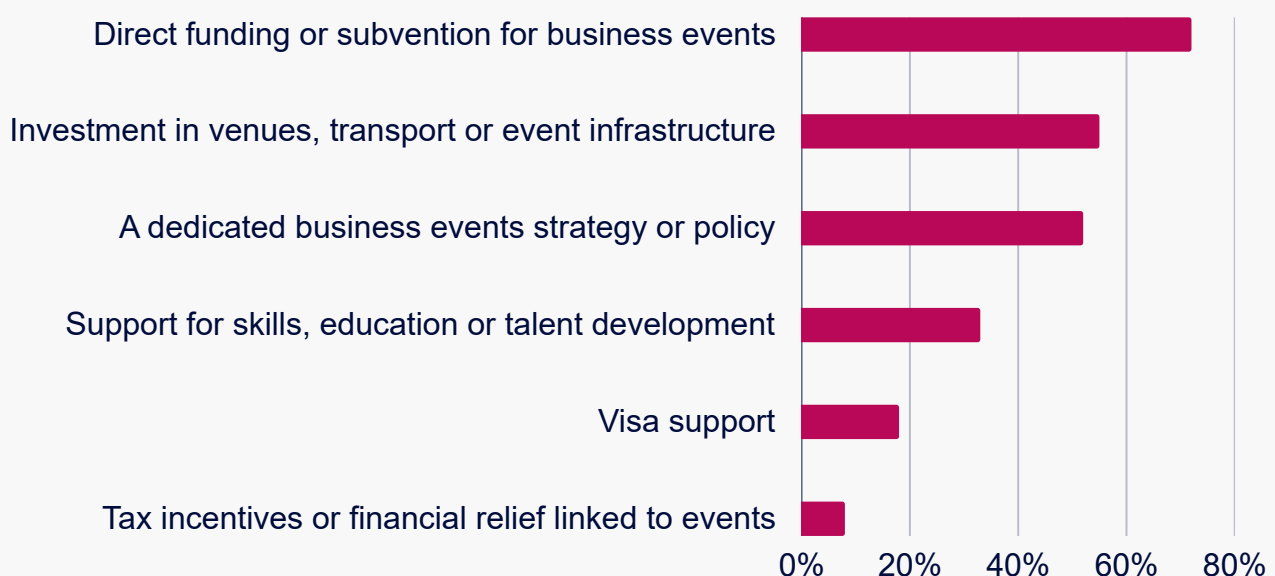
Across nearly all locations, 'Economic growth and return on investment' was rated as the most effective argument, with average scores closest to the top rank (5). However, there are some regional differences: for example, Africa and Asia gave higher rankings to 'Trade, investment and inward business' and 'Innovation and knowledge exchange' compared to other regions. In contrast, Western, Northern, and Central Europe, as well as North America, consistently prioritised economic growth as the strongest argument.

Q12: Which of the following forms of government support are you currently seeing in your destination?

Overall, government support for business events is most commonly delivered through direct funding or subvention, followed by investment in venues, transport and event infrastructure, and dedicated business events strategies or policies. However, the mix of support mechanisms varies by destination type and governance level, with larger and national-level destinations typically reporting a broader combination of strategic, financial and infrastructure support.

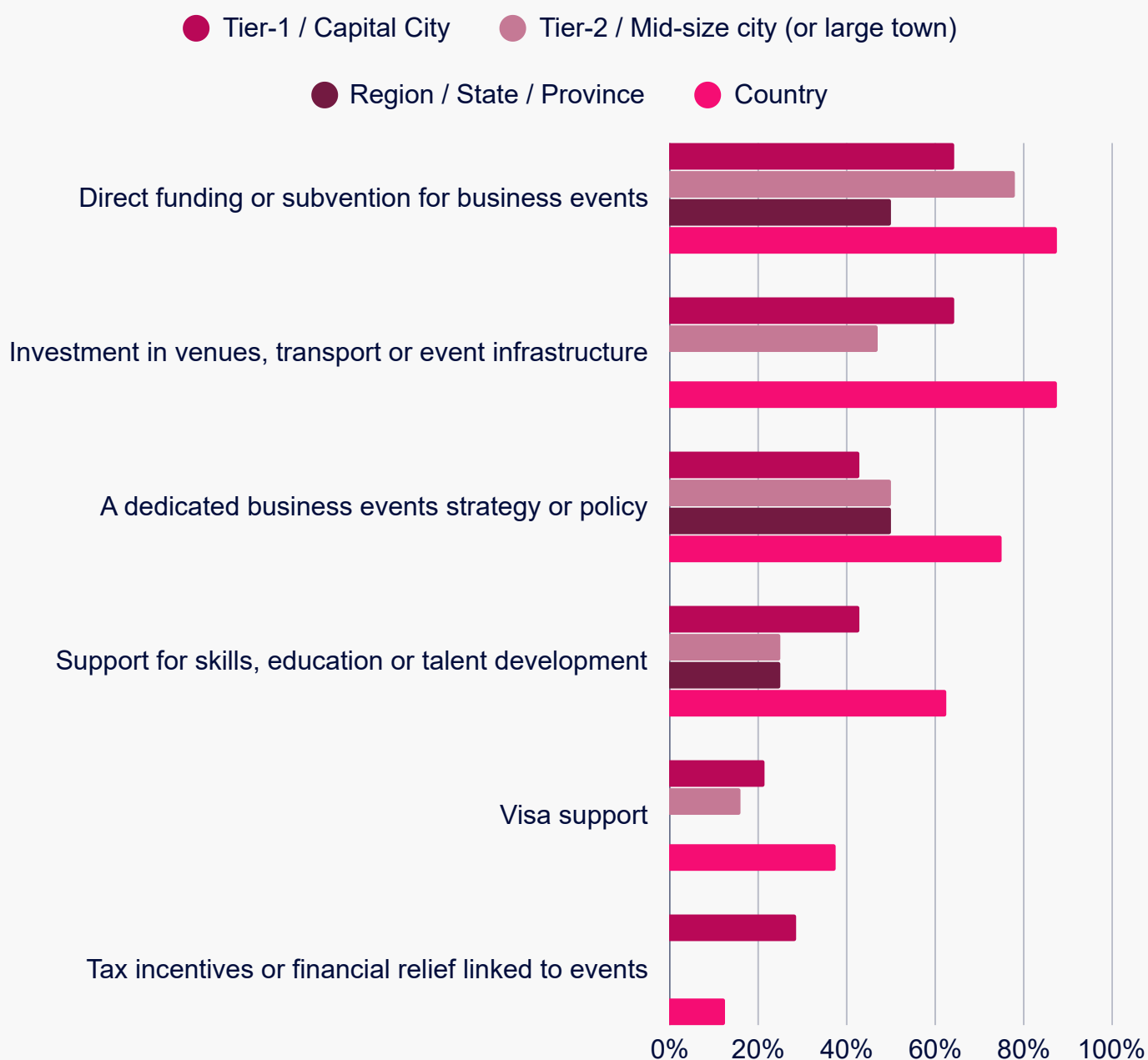
Building on findings from the previous year's research, which showed that governments support business events in a variety of ways, this year's results provide a clearer picture of how that support is currently being delivered in practice. The results indicate that in 2025 government support for business events was most commonly delivered through direct funding or subvention (**72%**).

This is followed by investment in venues, transport and event infrastructure (**55%**) and the presence of a dedicated business events strategy or policy (**52%**), highlighting the importance of both financial and structural support mechanisms. Support for skills, education or talent development is also evident (**33%**), although at a lower level, suggesting a more limited focus on workforce development. In contrast, other forms of support such as visa support, tax incentives or financial relief are less widely reported, showing that fiscal policy tools are less commonly utilised.



Differences by destination type reveal some variation in emphasis. At the country level, respondents most frequently report strong support across infrastructure investment, direct funding and strategy, indicating a broad and well-established policy framework. Regional respondents also report relatively high levels of both strategy and funding, suggesting these are commonly embedded at this level of governance.

At the city level, patterns are slightly more differentiated. Tier-2 report particularly strong reliance on direct funding, alongside moderate levels of infrastructure and strategy, suggesting a somewhat more focused support model. Tier-1 show consistently high levels across infrastructure, funding and strategy, indicating a more comprehensive mix of support mechanisms rather than reliance on a single approach.

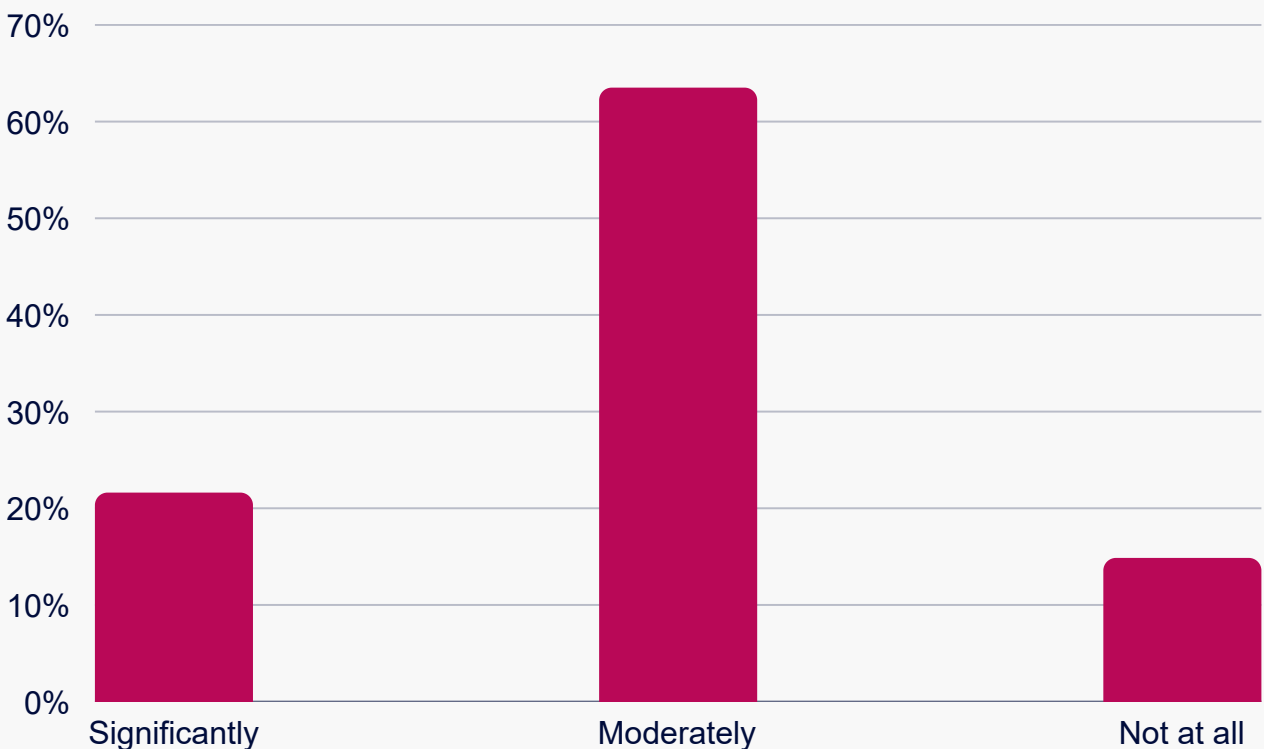


Q13. To what extent are current geopolitical factors affecting your ability to attract or deliver business events?

In 2025 geopolitical factors were having a noticeable impact on the ability to attract and deliver business events, with 86% of respondents reporting either a moderate or significant effect. Overall, the findings suggest that geopolitical uncertainty is influencing the sector to some degree across most regions, albeit unevenly. Note that the survey was conducted before the current situation with Iran.

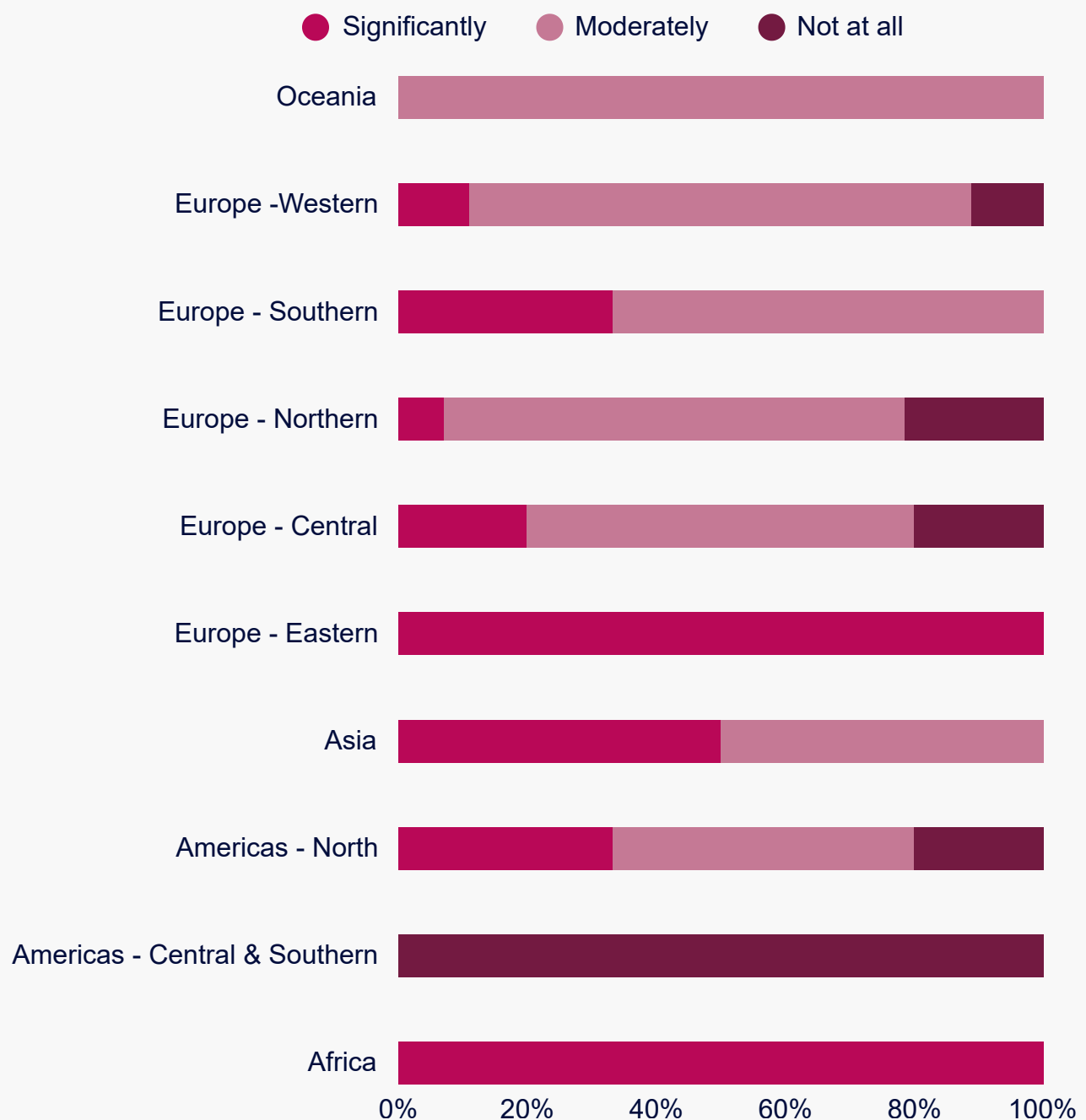
The majority of respondents report that current geopolitical factors were having a moderate impact on their ability to attract or deliver business events in 2025, while a further **22%** indicate a significant impact. Only a small proportion at **15%** report no impact at all, suggesting that geopolitical conditions are influencing the sector to some degree in most parts of the world.

It should be noted that, although respondents were asked to reflect on the impact of geopolitical factors during 2025, the survey was conducted in 2026 before the current situation with Iran. Given the rapidly changing geopolitical landscape, some responses may also reflect the influence of more recent developments on the ability to attract or deliver business events.



Perceptions of the impact of geopolitical factors vary considerably across regions. In many regions, around two-thirds or more of respondents reported a moderate impact on their ability to attract or deliver business events, including in Western Europe, Southern Europe, Asia and North America. Eastern Europe stands out most clearly, with all respondents reporting a significant impact.

In contrast, respondents in Central and South America overwhelmingly reported no impact at all. Africa also reported comparatively high levels of significant impact, with around half of respondents selecting this option.

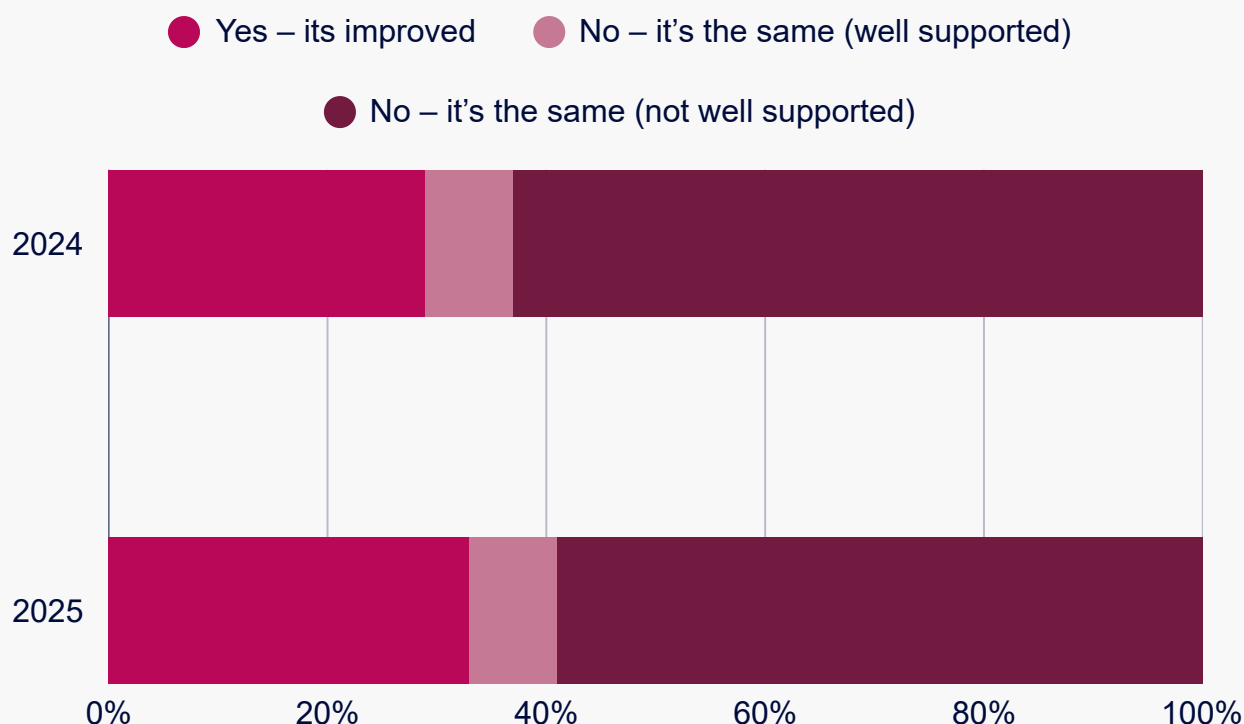


Q14. Previously participants felt that there was a need for stronger advocacy from the government and understanding of the importance of business events, particularly in terms of the indirect economic benefits, impact and legacy. Did you start to see an improvement on this in 2025?

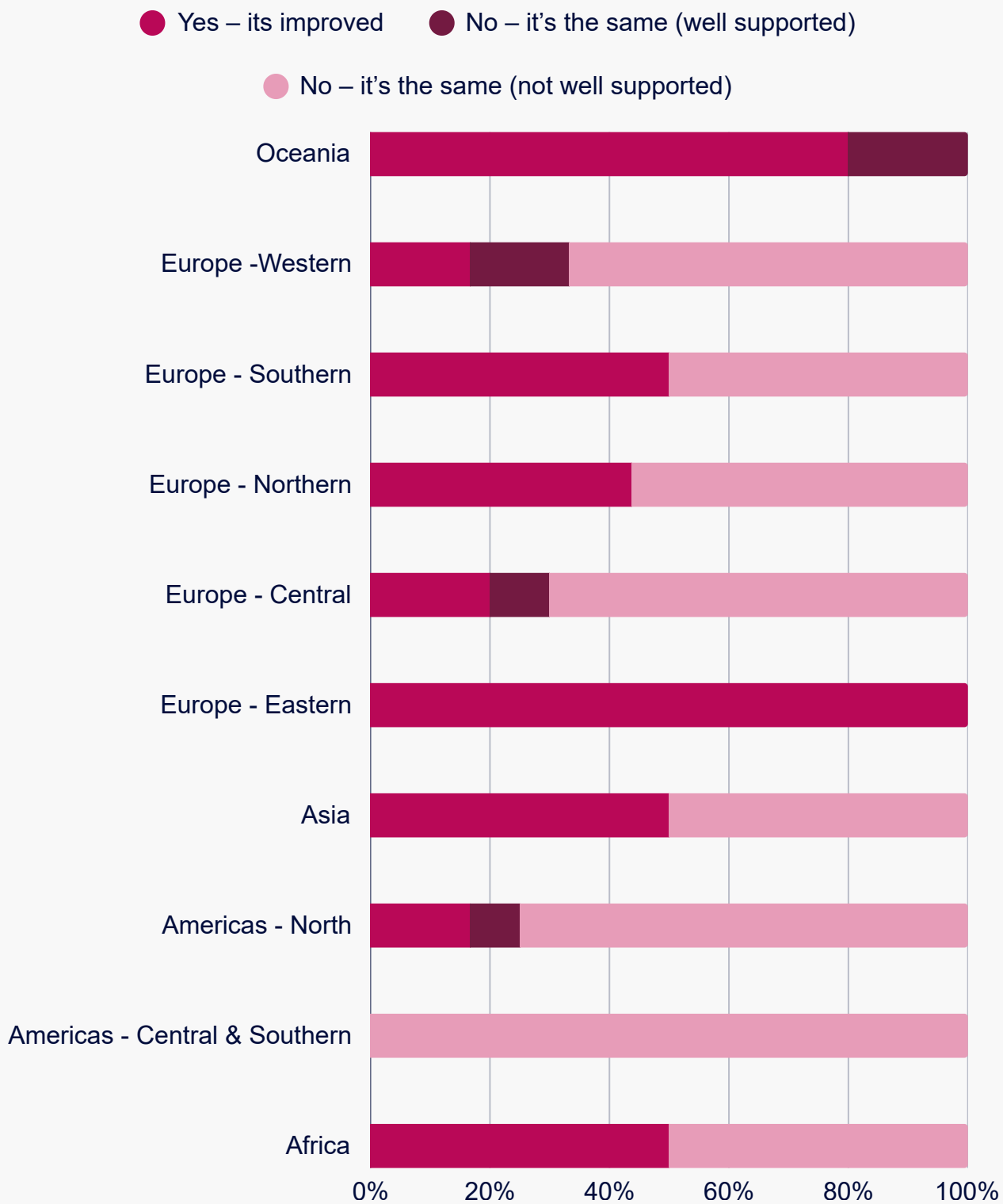
Overall, while there are signs of gradual improvement, the findings suggest that most destinations continue to perceive business events as insufficiently supported, with only a minority reporting meaningful progress.

The results indicate a slight improvement in perceptions of how well business events are supported. The proportion of respondents reporting that support has improved has increased from **29%** in 2024 to **33%** in 2025.

However, the majority of respondents still indicate that support remains unchanged and not well supported, accounting for around **60%** in both years, highlighting an ongoing gap in perceived support levels.



Notably, this perception is more evident in specific regions, particularly Oceania and Eastern Europe, where respondents are more likely to report that business events are well supported.



Interviews summary

This section of the report synthesises qualitative interviews with business events representatives across Europe, North America and Australia. The sample includes a range of destination representatives from city convention bureaux to national tourism organisations.

The interviews point to a sector that is largely recovered and strategically ambitious but operating in a more complex environment shaped by cost inflation, geopolitics, connectivity constraints, uneven government support and growing expectations around sustainability and legacy. A series of interviews were undertaken, providing sufficient qualitative data to identify trends and develop a deeper understanding of respondents' perspectives.

Across the interviews, one overarching finding is clear: business events are no longer being understood simply as visitor economy activity. Destinations increasingly view them as tools for economic development, trade, innovation, talent attraction and sector positioning. However, government structures, funding mechanisms and measurement systems have not always caught up with this shift.

Interview findings

A central pattern across the whole sample is that the market is no longer being judged only by headline volume. Interviewees repeatedly described a sector that is more strategic, more selective, and more exposed to external conditions, with success increasingly defined by value, alignment with priority sectors, and long-term impact rather than simple event or delegate counts.

Across the interviews, several clear, recurring themes emerge:

1. Theme one: Activity, value and market trends

Across the interviews, destinations describe a market that is broadly solid and healthy but structurally changing. Volumes are not simply increasing; instead, many destinations report a rebalancing between the number of events, delegate mix (national versus international), and higher spend per participant. One interviewee commented:

“ There has been a decrease in the activity compared to 2024... we had a decrease in number of attendees and events. But on the other side, there was an increase of the overall spending per participant.

(European city)



Tier-1 destinations are often trading slightly lower volumes for higher yield and more premium positioning, while also managing cost inflation and perception or visa-related challenges. At the same time, Tier-2 and regional destinations are capitalising on value for money, compactness, and sector alignment to win business that might previously have defaulted to Tier-1 hubs.

One interviewee also pointed to a growing pipeline, particularly from 2027–2028 onward. International business is a key differentiator: some destinations are seeing strong growth in international events, while others (notably in the US) are struggling with international attendance despite solid domestic demand.

Across the interviews, association events are repeatedly described as more resilient than corporate or incentive business during periods of uncertainty. Corporate budgets react faster to economic stress and perception risk, while associations often still need to convene, even if sponsorship softens or delegate budgets tighten. This makes the association market strategically important not only for sector alignment, but also for resilience. With an interviewee reporting:

“I remember our general manager would say, ‘Thank goodness there are association events’. They need to take place” (European City).

Another reinforces that while corporate demand is more volatile, association events remain structurally stable even under financial pressure stating that:

“ those within corporate organisations are searching, are seeking for something special, but they are not so ready to spend money.... the budgets are contracted, but everything needs to be beautiful and spectacular.

(European town)

It should be noted that the North American picture differs sharply between the US and Canada.

With a capital city in US reporting strong domestic demand but significant pressure on international attendance due to visa issues, immigration concerns and perceptions of the US political climate:

“The geopolitical landscape is very difficult for us to navigate right now”,

whilst Canada have clear growth trajectories, especially for Tier-2, as affordability and compactness become more attractive.



Taken together, the interviews suggest that the market is healthy but structurally changing. Europe appears mixed, with some destinations reporting reduced volume but stronger value and others pointing to strong future pipelines.

The North American market appears increasingly divided, with Canada's Tier-2 area growing into a value-led opportunity space, while US cities face additional external friction around access and image. Oceania's Tier-2 destinations present one of the clearest examples of aligned growth, where destination positioning, government support, and sector strategy are reinforcing one another.

2. Theme two: Tier-2 destinations are gaining strategic advantage

A recurring theme is the growing competitiveness of Tier-2. These destinations cannot always match Tier-1 cities on air access, profile or scale. However, they are increasingly attractive because of affordability, compactness, sector strengths and delegate experience.

Tier-1 or top-Tier destinations such as capital cities across US and Europe have strong infrastructure, international visibility and established sector narratives. However, they also face pressure from high costs, political perception issues and competition from more affordable cities.

The European Tier-1 cities are positioning themselves as premium, which is increasing spend per participant but may also contribute to volume pressure. The challenge facing US Tier-1 destinations is less about infrastructure and more about national reputation.

Tier-2 destinations all see value-for-money as a core advantage, as one commented:

“I think we're being looked at a little bit more because we are a Tier-2 city and maybe not as expensive.”

These cities also emphasise walkability, personal service and close connections between venues, universities, government and industry clusters, with interviewees commenting:

“Once the events are actually taking place here... they love being five minutes from everything.”
(Canadian city)

“You can walk from one end of the city to the other in twenty minutes, essentially. And it's a flat city.”
(Oceania city)

Across several interviews, these characteristics were positioned as more than practical advantages. Particularly among Tier-2 and regional destinations, compactness, accessibility and stronger local engagement were seen as factors that enhance networking, collaboration and delegate experience.

This suggests that the growing competitiveness of some destinations is not solely cost-driven, but also relational. In this sense, business events continue to derive value from in-person connection, bringing together delegates, industry, government and research communities in ways that support knowledge exchange, trust-building and longer-term partnerships.

However, Tier-2 destinations consistently identify that they face three constraints: weaker air access, lower global visibility and smaller teams.

3. Theme three: Business models vary, but under-resourcing is common and funding models are fragile

The interviews show a wide range of organisational models which included national models (where business events sit within the national tourism organisation), city and regional public-private models, private non-profit or tax-funded models, hotel-funded models and venue-led models.

There are also significant disparities in funding across destinations. Some destinations experienced substantial funding reductions following temporary post-COVID increases, while others reported anticipated future cuts, including one European country expecting a reduction of nearly €1 million from 2028. By contrast, several Tier-2 destinations reported recent funding growth.



Dedicated business-events funding is important but fragile. Canadian and US interviewees repeatedly reference the importance of support, such as the International Convention Attraction Fund (ICAF - a fund administered by Destination Canada to secure high-value international conferences and events for Canada) and supplemental bed-tax style funds. With one interviewee stating:

“

What was really nice about that program...is it put us all on the same playing field...I'd love to see that remain so that we can actually utilize it....

(Canadian city)

However, at the time of the interview, ICAF remained an area of uncertainty, as the announcement regarding its renewal had not yet been made. Where tourism levies or schemes such as ABIDs (Accommodation Business Improvement Districts) exist (e.g. European cities), they are seen as a competitive advantage; where they don't have these, destinations feel they are competing at a disadvantage.

Tier-1 cities often have larger budgets but are more exposed to political and fiscal changes. Tier-2 operate with smaller teams and must prioritise carefully, limiting growth potential.

Despite these differences, many respondents feel operationally capable but strategically under-resourced. Even in destinations where staffing has improved, respondents repeatedly described the gap between what they can currently deliver and what they believe the market would allow if resourcing were stronger, with interviewees commenting: **“Compared to other European destinations, that I know we are understaffed.”**
(European city)

“

We're small but mighty... but I think there would be a lot more lead volume if we had more people, and then more conversion.

(Canadian city)

A further pattern is that funding fragility increasingly affects not only core sales work, but the functions that destinations now say they need most: international business development, market intelligence, sustainability programming, legacy design, and government advocacy. In other words, when funding is cut or stretched, the first risk is not necessarily that a bureau stops operating. The deeper risk is that it cannot evolve in line with what the market now demands.



4.

Theme four: Government understanding and advocacy is improving, but business events are still often misclassified as ‘just’ tourism

Interviewees noted that attracting events is increasingly well regarded by government stakeholders, with one respondent explaining that: **“attracting events is well regarded and something that the state government recognises, and that's why they support us.”**
(Oceania city)

This understanding remains uneven and is often constrained by how business events are positioned within government structures. Across the sample, positioning varies widely. Some organisations are embedded within tourism departments, others report directly to economic development or central government, and some operate as independent non-profits funded through mechanisms like bed tax.

A consistent pattern emerges whereby local and regional governments tend to be more engaged, while national-level support is often weaker or absent.

This structural positioning changes with every new government, with several interviewees highlighting how political turnover creates continual advocacy challenges: **“we will have a massive turnover in our local government so we are facing a whole new strategy around advocacy and educating a new wave of individuals as to why business events and tourism is important.”** (US City)

It also continues to influence both perception and support:

“We fall under tourism. We are trying to get more connected with innovation, with economic affairs and with other areas of the city
(European City)

This highlights an ongoing challenge: while the value of business events is increasingly recognised, they are still frequently treated as part of the visitor economy rather than as strategic economic infrastructure.

Barriers to stronger government support are also consistent across destinations.

Budget deficits and competing priorities limit available funding, administrative constraints can restrict targeted interventions, and frequent political turnover requires ongoing re-education of stakeholders. In addition, the relatively low visibility of business events compared to leisure or major sporting events can further limit political attention.

As a result, while advocacy is becoming more developed in terms of the arguments being made, structural positioning and challenges in measurement continue to limit how effectively these translate into sustained policy and funding support.

5. Theme five: External pressures are reshaping competitiveness

(It should be noted whilst this report was based on 2025 it was inevitable that some of 2026 activities such as the situation involving Iran, would come into discussions.)

Destinations increasingly see external pressures as structural, not episodic. Geopolitics, transport access, perception risk, and inflation are now embedded in how destinations think about future competitiveness and are now shaping competitiveness as much as internal strategy.

The clearest contrast here is between the United States and the rest of the sample. US interviewees described the geopolitical and reputational environment

as directly affecting international willingness to attend meetings in the US. This includes practical issues such as visas and immigration, but also softer issues of confidence and image. The concern is not only the business that has already shifted elsewhere; it is also the business that may never even consider the United States due to perception and reputation.



By comparison, Canada's Tier-2 destinations appear better positioned reputationally, but still constrained by access. Europe shows a more mixed pattern. European Tier-1 / Capital City suggests that instability elsewhere can produce opportunity when events are relocated out of more volatile regions, but also that the same turbulence can dampen travel from other source markets.

A second and even more universal issue is air access and connectivity, especially for Tier-2 and regional destinations, all

pointing to some form of access challenge, though the nature of that challenge varies. For some, long-haul connectivity and route development are central to scaling international ambition.

For others, the issue is ease of client and delegate access in a competitive landscape dominated by larger gateways.

A third pressure is cost of inflation, particularly hotel rates, travel costs, and tighter event budgets. A Tier-1 explicitly links higher delegate spend to increased hotel rates and premium positioning.

They reported that clients may still want distinctive experiences but are less ready to spend heavily. A Tier-2 also points to rising overall costs as a challenge for both clients and government supporters.

Yet inflation creates winners as well as losers. It strengthens the hand of destinations that can credibly present themselves as high-quality but better-value alternatives to the most expensive global hubs.

Finally, there is a growing sense across the destinations that climate and sustainability concerns will increasingly influence mobility and destination choice over time, even if they are not yet always the primary driver in individual bids.

The interviews suggest that destinations are starting to think about access, price, and sustainability not as separate issues, but as linked parts of competitiveness.

6. Theme six: Sustainability, inclusion, and legacy are becoming core differentiators, but evidence remains underdeveloped

As destinations increasingly emphasise legacy, sustainability, and sector impact, the value proposition of business events is broadening. They are no longer speaking only about delegate spend and room nights; they are talking about sustainability performance, inclusion, legacy, and knowledge-economy impact.

However, this agenda is evolving faster rhetorically than analytically. While many destinations believe strongly in these wider benefits, comparatively few appear able to measure them robustly or consistently due to limitations in time, funding, and available frameworks.

Sustainability is the most visible part of this wider value proposition, with many working with existing frameworks such as GDS-Index / EarthCheck and other developing toolkits for organisers. Oceania provides one of the clearest examples, using its sustainability credentials as a clear international differentiator and way of offsetting concern about long-haul travel. European destinations are also actively working on sustainability and legacy tools for organizers.

However, one European city suggests that sustainability is not yet usually the first thing clients ask for, but that it becomes persuasive when concrete measures are presented.

Another interviewee goes further by implying that changing generational expectations may gradually make sustainability, inclusion, and reachable destinations more central to choice: **“once they land, they know they’re in a destination that, that takes it (sustainability) very seriously and is actually one of the global leaders in that aspect.”** (Oceania city)



A congress is not just a temporary meet up of people... it adds to our national knowledge economy.

(European country)

Legacy is strategically important, but harder to operationalise. (Everyone agrees congresses contribute to knowledge, innovation and social outcomes.) But few have yet implemented robust, long-term impact measurement; research is resource-intensive and not yet a funding priority for most partners.

A European country interviewee articulates the challenge most clearly: **“Congresses add to the national knowledge economy but proving this medium- and long-term impact takes time, research, and money.”** Canada and the UK see real value in legacy frameworks and toolkits, particularly when national or external funding helps make that work possible.

This suggests that legacy is becoming a serious part of competitive positioning but remains vulnerable because it is rarely funded as well as bidding and sales. **“It takes a lot of time and research and therefore money and funding to find out what the long or midterm impact has been.”** (European country)

DEI and inclusion are complicated for some destinations. For instance, in the US some wish to present themselves as strongly committed to DEI while also acknowledging that political conditions and funding mechanisms can make explicit DEI positioning more sensitive for some clients, especially associations dependent on federal grants or similar funding channels. As one city notes:



DEI obviously in the United States, is an incredibly sensitive subject because it remains core to the value and the mission of many of the organisations that we work with...

We are unapologetically still leaning into DEI... [but] we have to be very sensitive to the funding mechanisms of many organisers especially associations and medical associations that we work with.

(US city)



That makes inclusion both a destination value and a risk-management issue. None of the other interviewees reported the same degree of political sensitivity around DEI, which makes this a genuine continental point of difference.

Overall, this theme shows that destinations increasingly want to compete on a wider definition of value. The challenge is that measurement, funding, and political language have not yet fully caught up. Sustainability is becoming easier to communicate because there are established frameworks and credentials. Legacy and knowledge transfer remain harder to evidence, even though interviewees repeatedly present them as some of the most important outcomes of business events.

Potential areas for action

The interviews highlight several recurring priorities and areas for action that could strengthen the business events sector.

These reflect both direct participant perspectives and broader patterns emerging from the qualitative analysis. Taken together, they point toward a more strategic and evidence-led future direction for the sector.



- **Create stable, flexible funding mechanisms that match how bids are actually won.**

Interviewees repeatedly point to the importance of protected funding for international sales, site visits, delegate growth, seed funding, and legacy programming.

Some of the strongest examples referenced are those with the most usable tools e.g. Canadian respondents valued ICAF because it helped level the field for smaller cities.

- **Adopt Tier-sensitive connectivity strategies.**

Tier-1, Tier-2, national and regional destinations do not need identical infrastructure responses. For Tier-2, the priority is often long-haul route development, stronger connecting services, and a clearer story around ease of access.

For regional destinations, surface mobility may matter just as much as aviation, more frequent public transport, easier airport transfers, and better internal rail/bus links which can materially improve competitiveness while also advancing sustainability goals. Connectivity should be recognised as a driver of competitiveness, not just a matter of transport.

- **Invest in capability, not only promotion.**

The interviews suggest that incremental increases in staffing and specialist capability would have real market effects. Destinations repeatedly identified unmet need in international business development, market intelligence, advocacy, legacy design, and impact evaluation. If governments want higher-value wins, they need to fund the capabilities that underpin and measure those wins, not only generic destination marketing.

- **Build formal whole-of-government support systems.**

A relatively low-cost but high-value solution suggested is to standardise practical support across government: rapid letters of support, speaker access, political hosting, coordination with sector ministries, and access to civic venues or innovation precincts. Several destinations already use these tools successfully. The interviews suggest an opportunity to make these forms of support more systematic, rather than relying on personal relationships or one-off goodwill.

- **Use sustainability and inclusion as capability areas, not only branding messages.**

Sustainability, DEI, and legacy are most useful when operationalised through toolkits, venue standards, transport choices, community partnerships, and organiser guidance, not just marketing. The interviews suggest that this is already happening in parts of the market. The next step is to make these areas more consistent and measurable, particularly where destinations want to justify premium positioning or counteract long-haul concerns.



- **Fund legacy and knowledge-impact measurement.**

If legacy is to become a serious policy argument, it needs stronger evidence. The interviews suggest a gap between strong intuitive belief in business-event benefits and limited long-term data to prove them. A practical next step would be to fund a small number of repeatable impact studies, tied to major sector-relevant events, to measure outcomes such as research collaboration, inward investment leads, policy change, skills development, and talent attraction. That evidence would improve both advocacy and future targeting.

- **Strengthen recognition of business events as part of wider economic infrastructure, alongside tourism.**

The interviews suggest a need for governments to recognise business events not only as part of the visitor economy, but also as contributors to economic development, innovation, trade, talent attraction, and sector growth. This does not necessarily require bureaux to move outside tourism structures, but it does require stronger alignment across government policy areas and broader measures of value beyond visitor volume alone.

The interviews point to a consistent policy direction: destinations are not seeking more promotion alone, but greater recognition, enabling infrastructure, practical funding mechanisms, and stronger tools to evidence impact.

Across regions, there is a shared ambition to position business events as a strategic driver of economic growth, sector development, and long-term place-making, rather than a discretionary branch of tourism. This is set against a backdrop of resilient demand facing external pressures, persistent resource constraints, and a gradually improving, though still uneven, level of government understanding.

Collectively, the findings reinforce the need to frame business events as high-value, long-term economic and societal investments.





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About The Business of Events

The Business of Events (TBOE) is an independent Think Tank and Advocacy Network for the Global Events Sector.

Our primary role is to raise the importance and profile of business events as a driver of economic and social policy, developing ideas and initiatives that unlock the potential of the industry and maximise the opportunities delivered by having a strong business events sector. We achieve this through a combination of Policy, Advocacy, Content and Engagement; bringing together senior leaders from across the business events sector, including leading destinations, major venues, event agencies, trade bodies and event technology providers, to discuss policy ideas and initiatives and to connect with Government, policy makers and influencers, public sector organisations and politicians.

Established in 2018 by brand communications agency Davies Tanner, our shared vision is supported by several strategic partners, along with many of the leading business events destinations, venues and trade associations.

For further information regarding The Business of Events and our work, and how you can get involved, please contact:

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To keep up to date on everything related to The Business of Events, please subscribe to our social media channels

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About Davies Tanner

Davies Tanner are a specialist, privately owned and successful public relations agency, which for the past 26 years have been the recognised leader in providing brand communications services to the global business events community, including strategy development, media relations, content marketing, social media, digital storytelling, stakeholder engagement, advocacy and public affairs.

This expertise has enabled us to create powerful and engaging campaigns for our clients, which go beyond simply the economic impact of business events, to put the industry front of mind with event planners, industry leaders, policymakers and stakeholders.

Working with leading destinations and convention bureau, venues, hotels, trade shows and industry associations, we work with our clients to tell their very best stories and deliver revenue.

For further information regarding Davies Tanner and our work, and how you can get involved, please contact:

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