



ibtm[®] WORLD
TRENDS
REPORT 2026

by Alistair Turner

CONTENTS

INTRODUCTION	03
GLOBAL SUMMARY	04
CULTURAL TRENDS	
Exceptional Experience	07
Workplace Revolution and Events	11
Demographics	13
Global Relevance	21
Sustainability Legislation in 26	24
Diversity, Equity & Inclusion	26
EVENT TECHNOLOGY	
AI in Business	28
AI in Global Meetings & Events	32
Event Technology	35
BUSINESS TRENDS	
Banking & Finance	36
Esports & Gaming	39
Information and Communications Technology.....	41
Pharmaceuticals	44
EXPERIENCE TRENDS	
Corporate Events	47
Association Meetings	50
Incentive Travel	53
M&A Deals, Data and Destiny	56
REGIONAL TRENDS	
Introduction	59
<i>Europe: Main Report (November 25)</i>	
<i>North America: Main Report (November 2025)</i>	
<i>Africa: ibtm Africa (April 26)</i>	
<i>Middle East: ATM (May 26)</i>	
<i>Asia Pacific: ILTM Asia Pacific (July 2026)</i>	
<i>Latin America: IBTM Americas (August 2026)</i>	
Europe: <i>Rising to the Challenge</i>	60
North America: <i>Power and Partnership in a Changing world</i>	63
CONCLUSION	66

INTRODUCTION

Writing this report is a labour of love. It is both one of the most intellectually stimulating and exhausting pieces of work I do. It is also one of my proudest, not least because of the continued feedback I get throughout the year from people across the industry and beyond who have referenced it, used it and gained value from it.

It takes time to write, long periods of trawling through reports, trying to find data, communicating it clearly. From first putting metaphorical pen to paper to the conclusion, things change. None more so than in this year. On a daily basis there is new information, new events and new opinions of global significance.

Right now, I'm pouring over discussion and debate around the murder of Charlie Kirk, a controversial political commentator and a married man with two children. It's a reflection of a global tone, about the fragmentation of opinion, about a worldwide conversation. Flick over the page and we see some of the most horrific suffering experienced by humanity in generations that took place in Gaza. One more page flick and we look at AI and the amazing 'progress' this technology could indicate for mankind.

It shouldn't be shocking that across a multicultural society of over 8 billion people there can be such diversity, but it does test one's resolve when we can talk about progress on one side while looking at man-made tragedy on such a monumental scale.

I set this report up in such a way because, in large, it presents possibly one of the most positive outlooks for the industry in a decade. Every trend, macro and micro, and every data point underlines that we, in meetings and events, continue to enjoy a golden era of event creation and industry success. I know this is not always felt universally, but from a global perspective, there really hasn't been a better time.

What's more, this growth is flying in the face of incredible head winds. War, restrictions on travel, tariffs and the suppression of conversation and research all deeply affect what we do. Yet still, businesses and brands are increasing their trust and belief in the value of bringing people together,

and that to do it properly takes smart, strategically minded creative people. The significance of this should not be underestimated.

This success is catching the eye of the financial sector. We're seeing more startups, investors and M&A activity; 'the money' is looking at events as a stable investment. With this in mind, we have included a new section of the report, Ignite. This area looks at the dynamics of finance within meetings and events. It's an exciting new area, which will be reflected on the show floor as IBTM once again opens more opportunities for business growth; this time as a springboard for startups to jump into the hands of investors.

Predictably, you will also see AI and Event Technology within the report. Again, an area that is fuelling growth, but also quality within the industry. How we innovate both in terms of implementation and evaluation is part of our success story, it is being driven by event technology. For this reason, this section has expanded again.

It's worth mentioning here that this report too, has been enhanced by AI technology, the ultimate personal secretary. AI has enabled the discovery of new citations and new datapoints, as well as the collection of reports and information from around the world. I hope its input makes this report more diverse and inclusive, just as the AI section of the report itself wishes for.

Of course, it is not just the wizardry of AI that collects data it is the dozens of event professionals from around the world that make this report what it is. Too numerous to mention in person here, they know who they are, they know how grateful I am, and how this report would be a shadow without them. They are my non-artificial intelligence, their value is infinitely more, it is real, honest and unencumbered.

Finally, I want to thank the team at IBTM. Always supportive, full of ideas, full of ambition for this project and keen that this report represents the ultimate in credible insight. Few believe in this industry so much as to support work such as this.

Regards,



Alistair Turner

GLOBAL SUMMARY

Turbulence, Transformation & What's Ahead for Events

We begin the report with a macro look at the world around us. Events do not exist in isolation; they are affected by global context. Here we seek to understand what that is.

Entering 2026, the world stands in the aftermath of a 2025 defined by economic fragility, political flux and accelerating technological change. While many of the worst crises - war, displacement, inequality - persist, there are also signs the global community is pushing back. It is demanding responsibility of leaders, offering new regulatory guardrails for powerful tech and seeking more sustainable and inclusive pathways forward. For the meetings and events sector, this backdrop shapes both risk and opportunity in equal measure.



Political & Societal Shifts: Elections, Demographics & Polarisation

This year was a "year of elections" and their outcomes suggest both cautious moderation in some places but sharper polarisation in others. Far right and nationalist movements gained traction in parts of Europe, citing economic anxieties and migration pressures, while centrist governments have emerged in some of the more historically extreme areas of Latin, South and North America. At the same time, ageing populations in OECD countries are exacerbating labour shortages. Governments in Europe, North America and East Asia increasingly confront questions about immigration, pension systems and intergenerational equity. These demographic trends are shaping both public sentiment and the nature of an event delegation, as will be discussed in detail later in this report.



AI & Technology: Promise and Peril

At the same time, Artificial Intelligence continues to be a major pivot point. The WTO's World Trade Report 2025 suggests AI could boost global trade by about 34-37% by 2040 and lift global GDP by around 12-13% if adopted responsibly. But there are tensions: the risk of regulatory fragmentation, bias in algorithms, ideological control as seen in recent United States / China scrutiny of AI models) and inequitable access between richer and poorer countries.



Despite the relative slowing of global growth, any increase in GDP is good for events.



Economic Outlook: Slow Growth, Rising Stakes

According to the World Bank Global Economic Prospects 2025 and IMF World Economic Outlook Update 2025, global economic growth is projected at around 2.3% before the end of 2025, a downgrade from earlier forecasts, with only a mild pickup to about 2.5-3.0% in 2026. Developing economies, key sources of future demand for international travel and events, are being squeezed by weak external demand, tighter financial conditions and rising debt burdens.

At the same time, tariffs and trade barriers remain a potent threat. Some governments have doubled down on protectionist policies, affecting sectors like tech, agriculture and energy. These tensions distort supply chains, escalate costs and inject uncertainty, factors that ripple into event planning. However, despite the relative slowing of global growth, any increase in GDP is good for events.



The meetings and events sector is no longer a passive recipient of global conditions; it's increasingly one of those shaping values, expectations and global culture.



Environmental & Ecological Imperatives

Meanwhile, climate change has moved from being one of many issues to a core filter through which policies are judged. Governments and corporations alike are under mounting public pressure to reduce emissions and adopt ESG frameworks. The green transition is uneven: Europe continues to push forward but faces rising energy and investment costs, while emerging markets and small island nations are especially vulnerable to climate shocks.

What This Means for Meetings & Events

In the context of these global shifts, the meetings and events industry has been surprisingly resilient in 2025 and data points across the industry show signs of growth, certainly when it comes to volume, if not always value. There is a growing sense that participants want more than just the logistical aspects of events; they want meaningful content, greater safety, authentic local culture and a sense that the events they invest in align with their values.

At the same time, despite turbulence, the industry enters 2026 with more agency. The years of crisis have cultivated adaptability and responsibility. The meetings and events sector is no longer a passive recipient of global conditions, it's increasingly one of those shaping values, expectations and global culture.



Sources

- World Bank, *Global Economic Prospects June 2025*
- IMF, *World Economic Outlook Update, July 2025*
- Reuters / WTO, *"AI can boost global trade by around 40% by 2040, GDP by 12-13%", The Economic Times, 2025*
- Atlantic Council, *"US and Chinese AI action plans" comparative analysis, Atlantic Council, 2025*
- UN Reuters coverage on 2025 elections and political polarisation, *Reuters, 2025*

CULTURAL TRENDS

EXCEPTIONAL EXPERIENCES

An Outlook for 2026

The experience economy, a concept coined in 1998 by Pine and Gilmore has now to come to fruition. Escalated by the pandemic, with adults opting to spend their money on experiences rather than material goods, the global shift towards experientialism is evident.

However, according to Goc O'Callaghan, one of the leading thinkers in the world of experience, and representative of a new wave of strategic consultants with academic underpinning is looking to at the future of meetings and events, the events and experiences industry now stands at a crossroads: it must evolve again — from experiences that entertain, to experiences that transform.

According to Squire, by 2032, the global value of the experience economy is projected to hit \$2.1 trillion. Yet, financial growth tells only part of the story. A recent Mastercard survey across Europe revealed that, despite economic uncertainty, people are spending more on once-in-a-lifetime moments and travel, seeing them as 'investments in selfhood'. These purchases are not luxuries; they are about identity, belonging, and wellbeing.

In this experiential landscape, experiences must be transformative, personalised, inclusive, and innovate in concept.

From Experiences to Transformations

For centuries, human beings have gathered, around fires, in temples, at theatres, in stadiums, to share experiences. These gatherings were not just a form of survival or entertainment; they were ritualistic acts of belonging. Today, audiences are rediscovering this instinct, but with a new demand: experiences must not only connect, but they must also transform.

Goc continues, "Transformation speaks to the deepest human need; a transformational experience is anything that instigates a change within us. Situated at the top of Maslow's hierarchy of needs, self-actualisation is the ultimate goal: modern audiences are increasingly structuring their lives around the pursuit of growth, purpose, and meaning. No longer satisfied with the 'spectacle economy' of big screens and light shows, they crave events that leave them fundamentally changed; challenged, elevated, and expanded."

In 2026 and beyond, for companies to stay relevant and hold the competitive edge, they must move from being experience providers to transformation architects. The future of the industry lies not in events that we attend, but in experiences that become part of who we are.

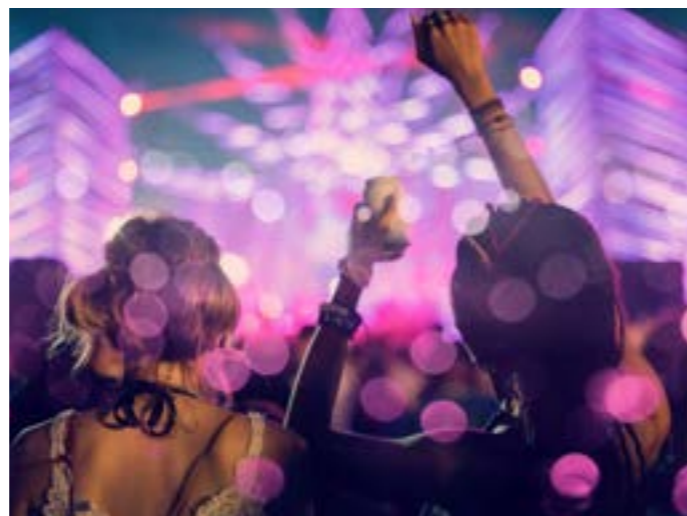


Personalisation and Human-Centred Design

To deliver transformation, experiences must feel deeply personal. In the age of hyper-choice, a generic programme no longer satisfies. Attendees expect an environment that flexes to their preferences, their interests, and even their emotional states. Therefore, the requirement to design personalisation into every event and experience is a core ingredient for success.

Artificial intelligence is rapidly enabling this. Recommendation engines are evolving beyond e-commerce into live environments, suggesting conference sessions, nudging festival-goers towards performances, or curating real-time 'choose-your-own-journey' pathways.

Experiences must not only connect, but they must also transform.



"But personalisation is not just digital," says Goc. "It includes spatial design that accommodates diverse needs, sensory details that resonate with individual profiles, and emotional touchpoints that speak to the unique story each attendee carries."

This level of tailoring creates extraordinary value. When an attendee feels an event has been personally created for them, they not only engage more fully but become long-term advocates.

The shift to human-centred design means thinking less about 'what we want to showcase' and more about 'what do we want the end-users want to feel.' Designing for the end-user through experience design best practice principles, the more deeply experiences mirror the lives and aspirations of their audiences, the more powerful their transformative effect.

Ultra-Accessibility in an Ageing World

Perhaps the most profound change shaping the sector is the need to design for longevity. We are living longer than ever before, and with that comes an evolution in our physical, sensory, and cognitive needs. Ultra-accessibility is not only about meeting the requirements of today's older populations, it is about designing for our future selves.

Goc comments, "We live in an aging world: demographics are shifting profoundly. The UN Department of Economic and Social Affairs reports that more than 700 million people are now over the age of 65, a number set to more than double by 2050. This ageing curve is not a fringe concern; it defines the mainstream audiences of tomorrow. As experience designers, we are designing for our own futures; a future that must consider and accommodate an older population."

What does it mean to plan an event in a world where a 70-year-old is as likely to be in the audience as a 30-year-old? It means acknowledging that accessibility is not a niche add-on but a universal design principle. It means recognising that what feels unnecessary for us now may be essential later in our lives.

Goc continues, "Ultra-accessibility moves us beyond compliance. It demands step-free environments and ergonomic seating, but also sensory diversity, cognitive inclusivity, and psychological comfort. It embraces technologies that translate in real time, caption dynamically, and provide navigation through haptic or audio guidance. It integrates quiet zones for neurodiverse attendees and ensures that accessibility is embedded from concept to execution, not retrofitted as an afterthought. Combined with personalisation, ultra-accessibility means the experiences of the future will be finely tuned to our own needs and motivations, again providing the environmental framework in which transformation is more likely to be achieved."



Imagination Poverty

In recent years, our sector has risked falling into what Goc calls imagination poverty. She explains, "Too many experiences look and feel the same. Too many terms have been stretched to breaking point – diluted due to misuse in lazy marketing, used where there is a lack of awareness of the term – and consequently the industry is bored of 'immersive' (as just one case in point)."

Conferences are casually labelled "festivals," stripping the word of its cultural weight. Any event with a combination of touchpoints and flashing lights calls itself 'immersive,' when true immersion requires depth, narrative, and sensory engagement, not just audience participation. 'Transformational' is used as marketing garnish rather than a genuine outcome. This dilution of language is one demonstrative example of imagination poverty.

She continues, "Imagination poverty is not only lazy; it is dangerous. When every experience feels familiar, the audience disengages. When terms lose their meaning, they lose their power. And when sameness dominates, the industry stagnates. As the curators of events and experiences, it our responsibility to take accountability in our work, to use the correct terminology, to design for a desirable (not probable future) and reduce the imagination poverty our industry is falling victim to."

The way forward is to reclaim originality. That means looking beyond sector norms and drawing inspiration from unexpected places: science, ritual, theatre, urban design, even nature. It means daring to create experiences that are not easily categorised, that defy clichés, and that resonate at the level of story and spirit, not just spectacle. Imagination is not a luxury in this industry; it is the raw material of transformation.

Transformation speaks to the deepest human need; a transformational experience is anything that instigates a change within us.

Outlook: Designing for Transformation

Lastly, according to Goc, "By 2030, the most successful experiences will be those that embody three qualities: transformational impact, radical inclusivity, and imaginative originality. Together, these qualities will redefine what it means to gather."

Transformation ensures that events are not just consumed but lived. Inclusivity ensures they are for everyone, across age, ability, and background. Originality ensures that they remain fresh, resonant, and meaningful in a world where sameness is instantly spotted and dismissed.

The events industry stands not only as an economic driver but as a cultural force. Done well, it can foster identity, wellbeing, and belonging at a time when societies face fragmentation and disconnection. Done poorly, it risks irrelevance.

Conclusion

As we move through 2026 and beyond, the mandate is clear: experiences must matter more. They must be transformational, not transactional. They must be designed for our future selves as well as our present needs. They must anticipate wiser audiences and reward their discernment with originality. And they must break free from imagination poverty to deliver experiences that are as unique and expansive as the people they serve.

The experience economy is no longer about spectacle alone. Its future lies in its capacity to transform lives, inclusively and imaginatively. For those willing to embrace this vision, the opportunity is profound: to create gatherings that are not only remembered, but that re-shape who we are and how we live.

Sources

- Goc O'Callaghan, www.gococallaghan.co.uk, www.ubqex.world, 2025
- Squire, 2024
- Mastercard, 202
- (UN DESA, 2025)

By 2030, the most successful experiences will be those that embody three qualities: transformational impact, radical inclusivity, and imaginative originality.



WORKPLACE REVOLUTIONS AND EVENTS

Charting Transformations

While IBTM World 2025 continues to embrace the ethos that People, Power, Potential, Workplace Revolution represents an insight into how the lives and behaviours of people in business are changing, and how new ways are being sought to unleash their potential within an increasingly fragmented, global, workplace.

These trends are bought to life both at the show itself and through this section of the report. The aim is to understand the changing nature of work, how executives approach their jobs, where they work from and their relationship with colleagues and the companies they support.

Understanding this area unlocks so much about the future of the meetings and events industry as it underlines the crucial relationship between events and employees. The headline is that this change continues to represent profound transformation; broader workplace revolutions continue to redefine how and where people connect, collaborate and create.

Hybrid Work: Beyond Experimentation to Expectation

Hybrid working has become the de facto model for many organisations. In the United States 83% of workers now value work-life balance over pay, signalling that flexibility has moved from perk to expectation. In the UK however, there is friction: nearly half (48%) of companies are pushing for full-time office attendance, up sharply from 27% in 2023, resulting in resignations in about 10% of cases. This dichotomy reflects a broader tension between employer control and employee autonomy which is reflected around the world.

Digital Nomads: Policy Evolution and Practical Expansion
In terms of where these employees are working, the fragmentation both across state lines and borders continues. The digital nomad lifestyle continues its ascent, but with greater structure and global policy support. As of mid-2025, many countries have launched or expanded nomad visa programmes.

This explosion of policies isn't mere tourism strategy; it's a calculated economic investment. Countries vie for high-income remote professionals who spend more per day than conventional tourists, stimulating local economies while minimising demands on social services. It makes them happier and more motivated, as well as more widely dispersed. At some point though, companies need to bring them back together in a physical environment and this is where events have their place.

Hybrid working has become the de facto model for many organisations. Flexibility has moved from perk to expectation.

Events as Extensions of Workplaces

Against this backdrop, the function of business events is evolving. Rather than being an escape from daily work life, events increasingly serve as extended, functional workplaces, complete with coworking zones, childcare facilities and opportunities to network under the guise of leisure.

One positive for the wider business event eco system is that attendees are staying longer, blending business and personal time and bringing their families along, transforming events into curated hubs of productivity, human connection and experiential immersion. For example, tech summits in Singapore and Dubai are integrating high-speed work lounges and meeting pods directly onto the show floor, allowing delegates to manage client calls between sessions. Family-friendly infrastructure, such as event crèches and city-based partner programmes for spouses, are reducing the logistical friction that might otherwise shorten attendance.

This shift not only enriches delegate experience but also elevates value across the event ecosystem; event organisers can offer longer, multifaceted programmes, while destinations benefit from extended tourism and cultural engagement and attendees enjoy richer, more flexible participation.

A Holistic Workplace Emerges

These intertwined trends are weaving a new workplace tapestry, one where technology-enabled flexibility diminishes geographic constraints, work performance is judged by outcomes rather than office hours, policy adoption nurtures global talent mobility and conferences morph into destination-driven work-lifestyle experiences. It is underpinned by networking, learning and the recreation of watercooler moments, all put together by forward thinking event designers.



DEMOGRAPHICS: GLOBAL DEMOGRAPHICS AND THE FUTURE OF EVENTS

A Generational Balancing Act

One of the most popular additions to this report last year was the introduction of Demographics. It's no surprise; businesses and brands are increasingly fascinated by this constantly evolving data point. Be it the emergence of Generation Alpha, the ageing of Gen X and the arrival in the boardroom of the much-discussed Millennials, the changes in population have an impact on the events we curate, and those who attend them.

Sources

- Hybrid work surges in the US: 83% say work-life balance matters more than pay – Times of India, August 2025
- Return-to-office push drives UK resignations – Financial Times, 2025
- One in ten businesses lose staff over end of WFH – The Times, 2025
- Cost savings from avoiding commutes – news.com.au, July 2025
- Five hybrid work trends to watch in 2025 – MIT Sloan Review, December 2025
- Digital nomad visas – July 2025 updates – Nomad Magazine, July 2025
- Top 5 countries offering digital nomad visas in 2025 – The Worldwide Advisors, May 2025
- 2025 Digital Nomad Index – Moving To, July 2025
- Digital nomad visa countries guide – Wanderlust Magazine, May 2025
- Slovenia to launch nomad visa in November 2025 – CN Traveller, July 2025

Country / Territory	Rank	2024 Median	2020 Medians			
		Combined	Combined	Male	Female	Difference
Afghanistan	206	20	19.5	19.4	19.5	0.1
Albania	91	36.3	35.1	32.9	35.7	2.8
Algeria	146	29.1	28.9	28.6	29.3	0.7
American Samoa	141	30	27.2	26.7	27.7	1
Andorra	4	48.8	46.2	45.1	46.1	1
Angola	228	16.3	15.9	15.4	16.4	1
Anguilla	83	37.1	35.7	33.7	37.6	3.9
Antigua and Barbuda	109	33.9	32.7	30.7	34.4	3.7
Argentina	112	33.3	32.4	31.1	33.6	2.5
Armenia	69	38.9	36.6	35.1	38.3	3.2
Aruba	56	40.9	39.9	38.2	41.5	3.3
Australia	77	38.1	37.5	36.5	38.5	2
Austria	24	44.9	44.5	43.1	45.8	2.7
Azerbaijan	104	34.3	32.6	31.1	34.2	3.1
The Bahamas	133	30.7	32.8	31.7	34	2.3
Bahrain	111	33.4	32.9	34.4	30.3	-4.1
Bangladesh	144	29.6	27.9	27.1	28.6	1.5
Barbados	50	41.4	39.5	38.4	40.7	2.3
Belarus	46	42.1	40.9	38	43.9	5.9
Belgium	47	42	41.6	40.4	42.8	2.4
Belize	162	26.8	23.9	23	24.8	1.8
Benin	224	17.2	17	16.4	17.6	1.2
Bermuda	34	43.8	43.6	41.6	45.7	4.1
Bhutan	134	30.7	29.1	29.6	28.6	-1
Bolivia	163	26.6	25.3	24.5	26	1.5
Bosnia and Herzegovina	28	44.8	43.3	41.6	44.8	3.2
Botswana	161	27.1	25.7	24.5	26.7	2.2
Brazil	101	35.1	35.7	33.3	36.1	2.8
British Virgin Islands	74	38.5	37.2	37	37.5	0.5
Brunei	117	32.3	31.1	30.5	31.8	1.3
Bulgaria	19	45.1	43.7	41.9	45.6	3.7
Burkina Faso	218	18.7	17.9	17	18.7	1.7
Burundi	220	18.4	17.7	17.4	18	0.6
Cambodia	154	27.9	26.4	25.6	27.2	1.6
Cameroon	216	18.9	18.5	18.2	18.8	0.6
Canada	41	42.6	41.8	40.6	42.9	2.3
Cape Verde	149	28.8	26.8	25.9	27.6	1.7
Cayman Islands	51	41.2	40.5	39.7	41.2	1.5
Central African Republic	202	20.4	20	19.7	20.3	0.6
Chad	226	16.7	16.1	15.6	16.5	0.9
Chile	85	36.9	35.5	34.3	36.7	2.4
China	60	40.2	38.4	37.5	39.4	1.9
Christmas Island	78	38	-	-	-	-
Cocos (Keeling) Islands	62	40	-	-	-	-
Colombia	114	32.7	31.2	30.2	32.2	2
Comoros	183	22.7	20.9	20.2	21.5	1.3

Republic of the Congo	200	20.7	19.5	19.3	19.7	0.4
Cook Islands	52	41.1	38.3	37.8	38.7	0.9
Costa Rica	96	35.5	32.6	32.1	33.1	1
Croatia	20	45.1	43.9	42	45.9	3.9
Cuba	40	42.6	42.1	40.2	43.8	3.6
Curacao	81	37.8	36.7	34.4	39.5	5.1
Cyprus	67	39.5	37.9	36.7	39.4	2.7
Czech Republic	31	44.2	43.3	42	44.7	2.7
Denmark	45	42.2	42	40.9	43.1	2.2
Djibouti	164	26.3	24.9	23	26.4	3.4
Dominica	84	37	34.9	34.4	35.5	1.1
Dominican Republic	145	29.2	27.9	27.8	28.1	0.3
Democratic Republic of the Congo	225	16.9	16.7	16.5	16.8	0.3
Ecuador	153	28	28.8	28	29.6	1.6
Egypt	177	24.4	24.1	23.8	24.5	0.7
El Salvador	143	29.7	27.7	26.2	29.3	3.1
Equatorial Guinea	186	22.1	20.3	19.9	20.7	0.8
Eritrea	192	21.3	20.3	19.7	20.8	1.1
Estonia	22	45	43.7	40.4	47	6.6
Eswatini (Swaziland)	175	24.6	23.7	22.5	24.7	2.2
Ethiopia	203	20.4	19.8	19.6	20.1	0.5
European Union	-	44	44	42.6	45.5	2.9
Faroe Islands	86	36.8	37.2	36.9	37.7	0.8
Fiji	124	31.6	29.9	29.7	30.1	0.4
Finland	36	43.3	42.8	41.3	44.4	3.1
France	42	42.6	41.7	40	43.4	3.4
French Polynesia	98	35.3	33.3	33	33.5	0.5
Gabon	187	22	21	21.4	20.6	-0.8
The Gambia	205	20.2	21.8	21.5	22.2	0.7
Georgia	75	38.3	38.6	35.9	41.4	5.5
Germany	9	46.8	47.8	46.5	49.1	2.6
Ghana	191	21.4	21.4	21	21.9	0.9
Gibraltar	88	36.8	35.5	34.4	36.6	2.2
Greece	10	46.5	45.3	43.7	46.8	3.1
Greenland	100	35.3	34.3	35.1	33.4	-1.7
Grenada	97	35.4	33.3	33.1	33.4	0.3
Guam	137	30.3	29.4	28.7	30.2	1.5
Guatemala	174	24.8	23.2	22.6	23.8	1.2
Guernsey	23	45	44.3	43	45.6	2.6
Guinea	209	19.4	19.1	18.9	19.4	0.5
Guinea-Bissau	221	18.4	18	17.4	18.6	1.2
Guyana	150	28.3	27.5	27.2	27.9	0.7
Haiti	173	25	24.1	23.8	24.3	0.5
Honduras	168	25.7	24.4	23.5	25.2	1.7
Hong Kong	7	47.2	45.6	44.2	46.5	2.3
Hungary	27	44.8	43.6	41.5	45.5	4
Iceland	79	38	37.1	36.6	37.7	1.1
India	142	29.8	28.7	28	29.5	1.5

Indonesia	125	31.5	31.1	30.5	31.8	1.3
Iran	110	33.8	31.7	31.5	32	0.5
Iraq	184	22.4	21.2	20.8	21.6	0.8
Ireland	61	40.2	37.8	37.4	38.2	0.8
Isle of Man	26	44.9	44.6	43.6	45.6	2
Israel	140	30.1	30.4	29.8	31	1.2
Italy	5	48.4	46.5	45.4	47.5	2.1
Cote d'Ivoire	195	21.2	20.3	20.3	20.3	0
Jamaica	130	30.9	29.4	28.6	30.1	1.5
Japan	3	49.9	48.6	47.2	50	2.8
Jersey	76	38.2	37.5	36	39.5	3.5
Jordan	172	25	23.5	23.9	22.9	-1
Kazakhstan	121	31.9	31.6	30.3	32.8	2.5
Kenya	196	21.2	20	19.9	20.1	0.2
Kiribati	160	27.3	25.7	24.8	26.6	1.8
Kosovo	119	32	30.5	30.2	30.8	0.6
Kuwait	138	30.3	29.7	30.7	27.9	-2.8
Kyrgyzstan	151	28.3	27.3	26.1	28.5	2.4
Laos	170	25.4	24	23.7	24.4	0.7
Latvia	17	45.5	44.4	40.5	48	7.5
Lebanon	90	36.3	33.7	33.1	34.4	1.3
Lesotho	179	23.9	24.7	24.7	24.7	0
Liberia	207	19.9	18	17.7	18.2	0.5
Libya	165	26.2	25.8	25.9	25.7	-0.2
Liechtenstein	30	44.2	43.7	42	45.3	3.3
Lithuania	18	45.1	44.5	40.2	48.2	8
Luxembourg	64	39.9	39.5	38.9	40	1.1
Macau	43	42.5	40.8	40.7	40.9	0.2
Madagascar	193	21.3	20.3	20.1	20.5	0.4
Malawi	204	20.3	16.8	16.7	16.9	0.2
Malaysia	122	31.8	29.2	28.9	29.6	0.7
Maldives	120	31.9	29.5	29.2	30	0.8
Mali	227	16.4	16.1	15.6	16.5	0.9
Malta	35	43.5	42.3	41.2	43.5	2.3
Marshall Islands	169	25.5	23.8	23.6	23.9	0.3
Mauritania	185	22.1	21	20.1	22	1.9
Mauritius	66	39.6	36.3	35	37.6	2.6
Mayotte	223	17.3	17.2	17	17.5	0.5
Mexico	131	30.8	29.3	28.2	30.4	2.2
Federated States of Micronesia	152	28.2	26.3	25.5	27.1	1.6
Moldova	63	39.9	37.7	36.2	39.5	3.3
Monaco	1	56.9	55.4	53.7	57	3.3
Mongolia	126	31.5	29.8	28.8	30.7	1.9
Montenegro	53	41.1	39.6	38.1	41.1	3
Montserrat	87	36.8	34.8	34.1	35.6	1.5
Morocco	135	30.6	29.1	28.7	29.6	0.9
Mozambique	222	17.3	17	16.3	17.6	1.3
Myanmar	132	30.8	29.2	28.3	30	1.7

Namibia	182	22.8	21.8	21.1	22.6	1.5
Nauru	156	27.8	27	28.2	25.9	-2.3
Nepal	157	27.6	25.3	23.9	26.9	3
Netherlands	44	42.2	42.8	41.6	44	2.4
New Caledonia	103	34.3	32.9	32.1	33.7	1.6
New Zealand	80	37.9	37.2	36.4	37.9	1.5
Nicaragua	147	29	27.3	26.4	28.2	1.8
Niger	230	15.2	14.8	14.5	15.1	0.6
Nigeria	211	19.3	18.6	18.4	18.9	0.5
North Korea	94	35.9	34.6	33.2	36.2	3
North Macedonia	59	40.5	39	38	40	2
Northern Mariana Islands	116	32.4	32.8	31.8	34.1	2.3
Norway	58	40.8	39.5	38.8	40.2	1.4
Oman	159	27.3	26.2	27.2	25.1	-2.1
Pakistan	180	22.9	22	21.9	22.1	0.2
Palau	99	35.3	33.9	32.9	35.9	3
Palestine (Gaza Strip)	208	19.5	18	17.7	18.4	0.7
Panama	127	31.5	30.1	29.6	30.5	0.9
Papua New Guinea	190	21.7	24	24	24	0
Paraguay	123	31.8	29.7	29.5	29.9	0.4
Peru	139	30.2	29.1	28.3	29.9	1.6
Philippines	167	25.7	24.1	23.6	24.6	1
Poland	38	42.9	41.9	40.3	43.6	3.3
Portugal	11	46.4	44.6	42.7	46.5	3.8
Puerto Rico	13	46.1	43.6	41.6	45.3	3.7
Qatar	105	34.3	33.7	35	28.2	-6.8
Romania	16	45.5	42.5	41	44	3
Russia	48	41.9	40.3	37.5	43.2	5.7
Rwanda	198	20.8	19.7	18.9	20.4	1.5
Saint Barthelemy	6	47.4	45.6	45.5	45.8	0.3
Saint Helena, Ascension, and Tristan da Cunha	21	45.1	43.2	43.2	43.3	0.1
Saint Kitts and Nevis	72	38.6	36.5	36.7	36.3	-0.4
Saint Lucia	65	39.7	36.9	35.7	38	2.3
Saint Martin	106	34.2	33.3	32.5	34.1	1.6
Saint Pierre and Miquelon	2	51.2	48.5	47.9	49	1.1
Saint Vincent and the Grenadines	82	37.6	35.3	35.4	35.1	-0.3
Samoa	158	27.4	25.6	25.3	26	0.7
San Marino	14	46.1	45.2	43.9	46.3	2.4
Sao Tome and Principe	197	20.8	19.3	18.9	19.7	0.8
Saudi Arabia	115	32.4	30.8	33	27.9	-5.1
Senegal	213	19.2	19.4	18.5	20.3	1.8
Serbia	33	43.9	43.4	41.7	45	3.3
Seychelles	71	38.7	36.8	36.3	37.4	1.1
Sierra Leone	210	19.4	19.1	18.5	19.7	1.2
Singapore	68	39.4	35.6	35.4	35.7	0.3
Sint Maarten	55	41	41.1	39.6	42.7	3.1
Slovakia	39	42.8	41.8	40.1	43.6	3.5

Slovenia	12	46.3	44.9	43.4	46.6	3.2
Solomon Islands	171	25.2	23.5	23.2	23.7	0.5
Somalia	215	19.1	18.5	18.7	18.3	-0.4
South Africa	136	30.4	28	27.9	28.1	0.2
South Korea	15	45.5	43.2	41.6	45	3.4
South Sudan	217	18.7	18.6	18.9	18.3	-0.6
Spain	8	46.8	43.9	42.7	45.1	2.4
Sri Lanka	107	34.1	33.7	32.3	35.1	2.8
Sudan	212	19.3	18.3	18.1	18.5	0.4
Suriname	118	32	31	30.6	31.4	0.8
Sweden	54	41.1	41.1	40.1	42.1	2
Switzerland	32	44.2	42.7	41.7	43.7	2
Syria	178	24.1	23.5	23	24	1
Taiwan	29	44.6	42.3	41.5	43.1	1.6
Tajikistan	181	22.8	25.3	24.6	26	1.4
Tanzania	214	19.1	18.2	17.9	18.4	0.5
Thailand	49	41.5	39	37.8	40.1	2.3
Timor-Leste	201	20.6	19.6	18.9	20.2	1.3
Togo	199	20.7	20	19.7	20.3	0.6
Tonga	166	25.9	24.1	23.6	24.5	0.9
Trinidad and Tobago	73	38.5	37.8	37.3	38.3	1
Tunisia	102	34.4	32.7	32	33.3	1.3
Turkey	108	34	32.2	31.7	32.8	1.1
Turkmenistan	128	31.2	29.2	28.7	29.7	1
Turks and Caicos Islands	93	36.3	34.6	34.9	34.4	-0.5
Tuvalu	155	27.8	26.6	25.6	27.6	2
U.S. Virgin Islands	37	43	41.8	40.6	42.8	2.2
Uganda	229	16.2	15.7	14.9	16.5	1.6
Ukraine	25	44.9	41.2	38.2	44.3	6.1
United Arab Emirates	95	35.8	38.4	40.4	31.5	-8.9
United Kingdom	57	40.8	40.6	39.6	41.7	2.1
United States	70	38.9	38.5	37.2	39.8	2.6
Uruguay	89	36.5	35.5	33.8	37.3	3.5
Uzbekistan	148	28.9	30.1	29.4	30.7	1.3
Vanuatu	176	24.6	23	22.6	23.5	0.9
Venezuela	129	31	30	29.4	30.7	1.3
Vietnam	113	33.1	31.9	30.8	33	2.2
Wallis and Futuna	92	36.3	34	33.1	35.1	2
Palestine (West Bank)	189	21.9	21.9	21.7	22.2	0.5
World	-	31	31	30.3	31.8	1.5
Yemen	188	22	19.8	19.6	19.9	0.3
Zambia	219	18.4	16.9	16.7	17	0.3
Zimbabwe	194	21.2	20.5	20.3	20.6	0.3

This transformation is reshaping economies, altering who works, who travels and redefining the makeup of audiences at conferences, exhibitions and events.

This section looks at the macro and the micro, concerned with both how global demographics affect the society we live in, but also how this translates into the workplace and eventually into the event space. Regardless, we're a people industry and it's no surprise event professionals want to learn about what 'people' look like in 2026.

However, this year, instead of the story being about the generations to come, it's worth looking at the generations of now, and of growing relevance. As of mid 2025, more than 1.1 billion of the 8 billion global population are aged 60 or older, a number projected to surge to 1.4 billion by 2030 and 2.1 billion by 2050. The share of people 65+ has nearly doubled in recent decades, up to around 10% globally in 2024 and expected to exceed 16% by 2050.

This transformation is reshaping economies, altering who works, who travels and redefining the makeup of audiences at conferences, exhibitions and events. In contrast, fertility rates in many parts of the world are falling, lifespans increasing and populations shifting, both in size and age profile. It's clear that universally, event attendees are getting older.

An extreme example of this is Japan, where nearly 29.3% of the population is now aged 65 or over, with over half of those aged 65-69 remaining in the workforce. Meanwhile, South Korea is ageing even faster; its fertility rate fell to 0.68 in 2024, the lowest in the world. By 2062, half of South Koreans could be over 65. In China, the population has shrunk for three consecutive years, down to 1.408 billion, with over 65s projected to make up 30% by 2050.

In stark contrast is Nigeria. Its 230+ million people are overwhelmingly young, with a median age under 20. Roughly 40% are under 15 and only about 3 - 4% are over 65. Nigeria represents a wider trend across Africa, covered in this report last year; if Asia Pacific is characterised as ageing, the young are certainly to be found on the world's biggest continent.

Moving to North America, the United States has a median age of 39.1 and 34% of its workforce is aged 50 or over. Here it is worth touching on immigration, a contentious subject around the world, but particularly so in North America and with different countries taking wildly different approaches. Immigration is key to maintaining both workforce numbers and diversity of event audiences, as demonstrated more by Canada as opposed to its neighbour the United States.

Growth of population aged 60+ from
1.1B to 2.1 B
(2025) (2050)

Workforce ratio decline from
7.4:1 to 3.5:1
(2010) (2050)

Older workers to remain active for longer, often beyond
age 70

Regional Age 65+

Japan	29.3%
South Korea	50%
China	30%
Italy	22%
Germany	22%
Nigeria	4%

Share of people 65+ has nearly doubled in recent decades
10% globally
(2024)
Expected to exceed
16%
(2050)

Canada's population grew by over 1 million in 2023, 98% from immigration, creating a multicultural demographic. This multi-cultural influx is well worth considering as more event companies and brands look to export event content around the world.

In the meantime, similarly to the Asia Pacific region, Europe is ageing rapidly. Italy and Germany already have more than 22% of their populations aged over 65, with median ages in the mid 40s. Eastern Europe faces sharper declines; Bulgaria and Latvia are losing population through both low fertility and high emigration. At the same time, in Sweden, life expectancy is around 82 years and older adults remain active and mobile thanks to strong social systems. Here, older attendees often travel internationally to events, reflecting higher disposable incomes and better health than peers in many other regions.

As mentioned in previous chapters, the events industry should focus on these changing age dynamics. Globally, the ratio of working-age adults (20–64) to retirees is set to fall from 7.4:1 in 2010 to 3.5:1 by 2050. This shift is pushing older workers to remain active for longer, often beyond age 70 and, as covered in last year's report, leaves the prospect of a smaller section of the workforce working to support an increasingly larger one.

At the same time, different age demographics travel in different ways. In ageing regions, older attendees favour shorter, more comfortable trips, often by train. In youthful regions, budget airlines and group travel dominate.

For event professionals, the need to make their experiences as inclusive as possible remains, and to focus specifically on age. The average age gap between attendees from different regions will widen, making cultural sensitivity and programme diversity essential. For instance, the conference of the future might see a Scandinavian retiree, a Nigerian startup founder, a Saudi creative director, and a Gen Alpha coder from Toronto sharing the same breakout session.

Events have long spoken about personalisation; under this backdrop, a commitment to creating inclusive, personalised environments for all will continue to be tested.

Sources

- World Health Organization. *Population ageing, 2024*
- United Nations Population Fund. *Ageing Populations, 2024*
- Nippon.com. *Elderly Workers in Japan, 2024*
- Reuters. *Japan firms face labour crunch, 2025*
- U.S. Census Bureau. *Median Age in the U.S., 2024*
- AARP. *Older Workers in the U.S., 2023*
- Statistics Canada. *Population Growth, 2024*
- Eurostat. *Demographic Indicators, 2024*
- AP News. *China population decline, 2024*
- Census.gov. *Population Trends, 2024*
- World Bank. *Life Expectancy – Sweden, 2024*
- Saudi Vision 2030. *Strategic Plans, 2024*
- The Guardian. *Older Workers and Retirement, 2025*
- Wikipedia. *The Experience (Gospel Concert), 2025*
- Stanford Center on Longevity. *Global Demographics, 2024*



GLOBAL RELEVANCE - LOCAL RESONANCE

The New Dual Demand of Modern Event Audiences

In 2026, the most compelling events will be those that strike a delicate balance between global relevance and local resonance. Audiences increasingly expect to feel both culturally grounded and globally connected, and this dual desire is reshaping how events are now being curated.

The Rise of 'Glocal' Consumer Expectations

The term 'glocalization' aptly describes this intricate balance. It refers to how global trends are reinterpreted through local lenses and vice versa. In the context of events, this means attendees appreciate the prestige or scale of a global brand but only when it's anchored in local stories, values and experiences.

This sentiment is manifest in the growing trend of cosmopolitan localism, where local events are deeply rooted in place, yet networked within global systems. Events rooted in local culture but connected to global communities offer participants the best of both worlds.

Consumers Want Experiences That Reflect Both Local Roots and Global Values Recent consumer behaviour supports this. Reports from India highlight the rise of an 'IndiaLust' economy, where demand is surging for upscale, emotionally resonant experiences that blend local authenticity with global standards.

Local Venues and Reduced Travel

Organisers are already responding to this trend; the return of smaller, localized gatherings is both practical and aligned with audience values. Convene magazine noted local and regional events will make up the majority of programming across 2025 and there is no indication to suspect that this will not continue into 2026. The trend, driven by rising travel costs, CSR targets and the need to stay grounded in attendees' communities, once again supports this assertion.



Successful events enable participants to explore who they are locally while feeling part of something larger.

Cultural Moments Anchored in Local Context, Yet Universally Resonant

An example of this is the insertion of art and culture into events to amplify 'glocal' dynamics. The Vogue Business 2025 guide spotlights art fairs and biennales such as 1-54 Marrakech, Tokyo Gendai and the Kochi-Muziris Biennale; events deeply tied to place yet engaging a global audience. These cultural anchors resonate because they speak to local heritage while facilitating global cultural exchange.

On a more micro level, simple aspects such as food and food presentation can amplify these experiences. This is more than just a matter of catering for different cultures depending on the event theming and content. It also means working with producers to create localised menus that cut down supply lines and give audiences a literal 'taste' of the local community.

What This Means for Event Strategists

Event professionals must navigate this evolving landscape with thoughtful strategy:

- Embrace localism, not as insular parochialism, but as authentic cultural engagement.
- Recognise and engage with the world, leveraging technology to unify regional experiences into a cohesive narrative.
- Amplify sustainability, aligning local sourcing, venue choices and formats with audience values.
- Design for emotional resonance, ensuring experiences reflect both the locality of place and the collective consciousness of connected communities.

The modern event is less about top-down global brand delivery and more about co-creation with communities across geographies. Whether through culturally rich local activations or human-first design, successful events enable participants to explore who they are locally while feeling part of something larger.



Sources

- *Glocalization: combining global and local perspectives in business and culture* Wikipedia, 2025
- *Cosmopolitan localism: connecting local communities through global networks* Wikipedia, 2025
- *IndiaLust economy: consumers seeking authenticity with global standards* The Economic Times, August 2025
- *Event-led experiential travel trend in India* The Economic Times, May 2025
- *2025 business event attendees' focus on consumer-first values* PCMAP Market Research, 2025
- *Rise of local and regional events in 2025* Convene, October 2024
- *Eco-friendly event planning trends* venueNow.com, December 2024
- *Cultural platforms offering local and global resonance* Vogue Business, November, 2024
- *Preference for real-world connection amid digital fatigue* WIRED, November 2024

SUSTAINABILITY LEGISLATION IN 26

What It Means for Meetings and Events Professionals

As we enter 2026, sustainability regulation is no longer just a talking point, it's a compliance, marketing and brand trust imperative. From carbon reporting rules to circular economy mandates, governments worldwide are tightening legislation and the meetings and events sector will need to continue to react to these changes.

This is an industry that works globally, so the added complexity of inconsistent regulations will be a challenge to organisers. However, at its heart, the notion of 'doing good', creating events with strong values and purpose, should continue to be a north star for event planners.

In the meantime, organisers, destinations, venues and suppliers should not see these changes as just constraints, but catalysts for innovation, competitive differentiation and audience engagement.

The global meetings and events industry is uniquely placed to turn sustainability legislation from an operational challenge into a commercial advantage.

The Global Regulatory Push

Over the next two years, sustainability regulations will expand in both scope and enforcement. The European Union's Corporate Sustainability Reporting Directive (CSRD), which came into effect in 2024, has been phased in across more businesses in 2025 and will continue to do so into 2026, requiring detailed ESG disclosures, including emissions from events and business travel. Similarly, the UK's Sustainability Disclosure Requirements (SDR) will be finalised before the end of the year, aligning with the International Sustainability Standards Board (ISSB) framework (UK Government, 2025).

Elsewhere, California's (United States) Climate Corporate Data Accountability Act (SB 253) will begin requiring large companies to publicly disclose Scope 1, 2 and 3 emissions from 2026 (California Legislative Information, 2023), while Canada is tightening waste reduction policies under its Zero Plastic Waste Agenda (Government of Canada, 2024).

Those who act early won't just meet the law, they'll lead the market.

Why This Matters for Meetings and Events

Within the events community, these legislative shifts will cause ripples across suppliers, venues, sponsors and participants.

Worthy of consideration will be:

- **Carbon Accounting Becomes Mandatory:** Scope 3 emissions, which include delegate travel, catering supply chains and temporary infrastructure, are no longer a 'nice-to-have' in reporting; they're a legal necessity in many regions.
- **Procurement Policies Tighten:** Clients and sponsors will increasingly require venues, caterers and AV suppliers to meet compliance thresholds to even be considered for contracts.
- **Reputational Risk Rises:** In an age of radical transparency, greenwashing is more dangerous than ever. Failure to meet or prove compliance could mean public backlash as well as legal penalties.

Embedding Compliance into the Delegate Experience
One of the positive trends in both brand marketing and event experience creation is that the businesses approach to positive ESG action is being brought to life in the event environment. Instead of hiding sustainability measures in backend processes, they're making them part of the delegate journey, enhancing authenticity and brand trust.

For example, some organisers now integrate live carbon footprint dashboards at conferences, allowing attendees to see real-time emissions data from catering, travel and energy use. Others are gamifying sustainability, offering rewards for attendees who make low-impact choices.

The Business Case for Going Beyond the Law

While compliance is non-negotiable, there's a compelling case for exceeding it. Research from the Events Industry Council has shown that events with strong sustainability credentials enjoy higher delegate satisfaction, better sponsor alignment and longer-term brand loyalty.

A Sector on the Front Foot

The global meetings and events industry is uniquely placed to turn sustainability legislation from an operational challenge into a commercial advantage. The combination of regulatory pressure, audience demand and destination innovation means compliance can be reframed as a creative brief, one that inspires smarter events, stronger partnerships and more compelling stories. Those who act early won't just meet the law, they'll lead the market.

Sources

- European Commission (2024). Corporate Sustainability Reporting Directive, 2024
- UK Government (2025). Sustainability Disclosure Requirements, 2025
- California Legislative Information (2023). Climate Corporate Data Accountability Act, 2023
- Government of Canada (2024). Zero Plastic Waste Agenda, 2024
- Event Industry Council (2024). Sustainability and Events Trends Report, 2024
- European Commission (2024). Green Claims Directive, 2024

DIVERSITY, EQUITY & INCLUSION

From Representation to Cultural Relevance

The future of audience engagement is evolving beyond a single standard of aspirational storytelling or one-off transaction. Today, cultural relevance has become the foundation of compelling storytelling, setting trends and building genuine connections with audiences.

Mahalia Johnson, Head of Communications at The Zoo, an event and production agency that implements culturally aware events and which has become a leading global commentary on DE&I issues in events, explains: "At its core, cultural relevance is about having an authentic connection with communities by reflecting or amplifying their lived experiences. It isn't about capitalising on trends for convenience; people can see through that, but about understanding how an audience thinks, talks and moves, meeting them where they are, and being part of the narrative."

Mahalia notes that as conversations around Diversity, Equity and Inclusion become more muted, or in some sectors, avoided altogether, many brands are reframing their approach. "The DE&I landscape is shifting from 'representation matters' to a deeper exploration of what culture and community truly mean. Increasingly, businesses are moving toward culture and community-based discourse as a way to engage meaningfully while navigating an evolving space," she says.

This shift is mirrored both internally, through diverse teams, and externally, through collaborations with individuals and organisations from a wide range of backgrounds. For Mahalia, the events industry plays a vital role: "Events are one of the best opportunities brands have to engage with audiences in real life. They transform inclusive storytelling into immersive experiential moments, building genuine connections in ways that digital platforms alone can't."

From DE&I to Culture and Community

The shift from representation to culture is reinforced by wider social, political and technological forces. Social media has amplified voices once marginalised, pushing brands to be more attentive to nuance. Campaigns are now judged on authenticity and resonance, with lived experiences rather than polished aesthetics. At the same time, co-creation has become a hallmark of success. Brands that build campaigns with communities and influencers, rather than dictating from above, see greater impact.

Case Studies in Cultural Engagement

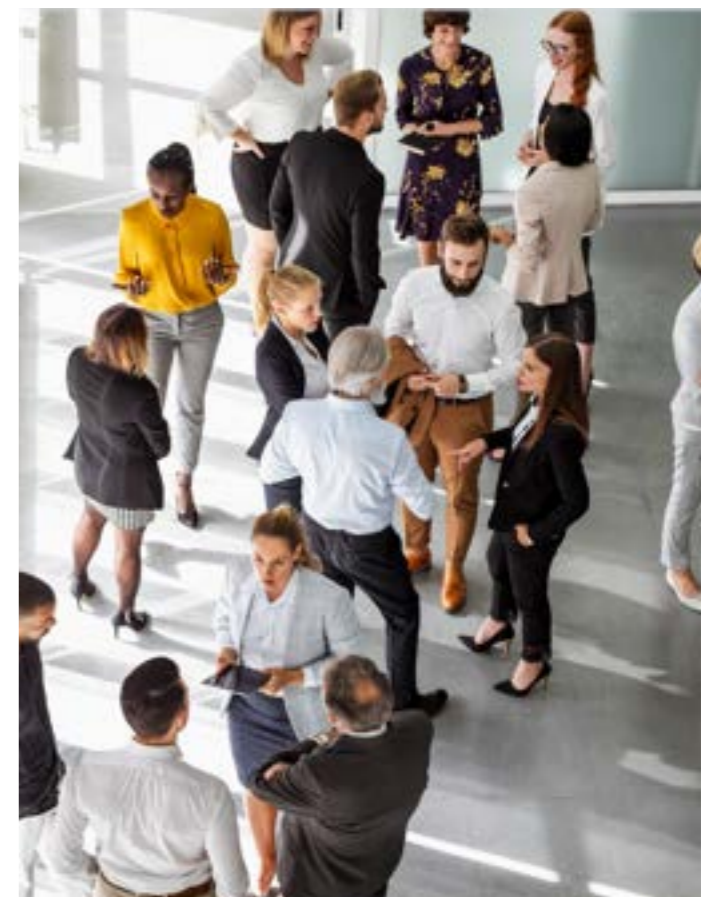
Several recent campaigns show what's possible when cultural engagement is handled with authenticity. For instance, Revelry New York embedded itself within the city's cultural fabric, blending food, music and art to normalise cannabis consumption in celebratory, community-driven ways.

Fashion brands, too, have embraced cultural storytelling. Burberry and H&M's "Bus Auntie" campaign, created with Wisdom, challenged narrow beauty standards by spotlighting older African women as style icons. Meanwhile, Red Bull's Culture Clash continues to celebrate Black British musical influence by bringing sound system culture into the mainstream. Sport, fashion and culture have increasingly intersected. Labrum London's 2024 collaboration with Adidas and Arsenal highlighted African footballers' contributions to the game while elevating African fashion design. Ralph Lauren's Oak Bluffs collection, developed with Historically Black Colleges and Universities, paid homage to the heritage of Black middle-class leisure culture in the United States.

Events as the Bridge

Mahalia believes events are uniquely positioned to bridge digital culture and real-life community. "Experiences are increasingly driving consumer interest as people prioritise shared moments over material possessions. When brands embed culture into events, they create not just marketing opportunities but spaces of belonging," she explains.

This trend aligns with research showing consumers are shifting towards experience-driven value. Deloitte's Consumer Tracker found consumers increasingly prioritise shared meaningful experiences over material goods. Events also enable brands to reduce barriers. Family-friendly infrastructure, such as on-site childcare, makes participation more inclusive. Hybrid and virtual extensions broaden accessibility for communities otherwise excluded. The evolution of DE&I into a broader focus on culture and community signals a profound change in how brands engage. Representation is no longer enough; cultural relevance requires authenticity, co-creation and respect for lived experience. For Mahalia, the opportunity is clear: "When events are designed inclusively and reflect the diversity of the communities they serve, they don't just tell stories, they create spaces where people truly belong. That's where culture and community come together and that's where events become transformational."



Sources

- Popular Pays – Community vs Traditional Marketing, 2025
- Communicorp – Opportunities in the Event Industry, 2025
- Allied Market Research – Events Industry Market Report, (2025)
- Deloitte – Consumer Tracker Q, 2025
- Barclays Corporate – The Experience Economy, 2025

EVENT TECHNOLOGY

Just walk through the halls of IBTM World and it's instantly recognisable how Event Technology is increasing its influence on the global meetings and events industry. This growth, which was already taking shape prior to the AI revolution, has since been supercharged by it.

The sector was ready to meet the opportunity of AI in a responsible way. The meetings and events community already had a combination of highly elite successful businesses, with scale and reserves to invest in research and development, but also an eco-system that supported young and dynamic businesses with ideas.

At the same time, everything from the pandemic to sustainability, inclusion to regulation, means that the industry should be in a place to take on AI responsibly.

Given this context, it makes sense that Event Technology, in all its forms, is elevate to a sector on its own within this report. Over the coming pages AI will of course take centre stage. However, we look to return to concurrent themes of accessibility, automation and augmentation as the key criteria for investments in Event Technology products and services, whether AI supported or not.

It's also highly gratifying to see the continued relevance of the Virtual Experience Economy first coined in this report and covering both the importance of virtual layers on live experiences, but also the importance of purpose, values and ESG strategies. It's fascinating that here in meetings and events, like in many other industries, technology and ethics are collaborating in a new AI world.

To begin with though, it's worth looking at the dynamics of this AI world.

AI IN BUSINESS

An Update

Global AI Market

US \$394-407 Billion

with CAGRs between **23-29%**

US \$1.9 Trillion by 2030

APAC revenue nearing **US \$105 Billion** in 2025.

AI adoption climbing rapidly to **71-78%** across leading markets

By Mid 2025 **61-63%** of global enterprises were actively using AI in at least one business function

Fortune 500 firms report **95%** AI usage as we come to the end of 2025

Macro

The global AI market is estimated at about US \$394-407 billion, with CAGRs between 23-29% and projections reaching US \$1.9 trillion by 2030. North America leads with a 37-41% share, while Asia Pacific (especially China and India) is the fastest growing region, with APAC revenue nearing US \$105 billion in 2025.

AI's usage is vast and growing. Across business, it is being integrated into customer support (chatbots), marketing (automated messaging, content tools), HR (candidate screening), operations (demand forecasting, process optimisation) and product innovation (AI augmented design

and R&D). Enterprises are embedding AI roadmaps into global strategy, investing significantly in infrastructure, while cost savings and efficiency gains are regularly reported.

By mid 2025, 61-63% of global enterprises were actively using AI in at least one business function, rising from 55% the year before, and with generative AI adoption climbing rapidly to 71-78% across leading markets (North America and China). In the meantime, Fortune 500 firms report 95% AI usage as we come to the end of 2025. This is a technology writing a new story for humanity, and it is being driven by businesses and brands.

The growth of AI technology is only matched by the speed of its evolution, making it one of the most significant advances in human history.

The Evolution of AI Technology: From LLMs to Agentic, Inclusive AI

The growth of AI technology is only matched by the speed of its evolution, the combination of the two underscoring why it is seen as one of the most significant advances in human history. From rule based expert systems to Large Language Models (LLMs) and now, the frontier of multi modal, agentic or autonomous AI, which can perceive, plan and act. These systems are increasingly capable of independent reasoning or pursuing objectives. However, as with all innovation, each opportunity presents a concurrent concern.

Inclusion, The Dead Internet & AI Slop

The growth in AI has raised issues around diversity and inclusion. Legacy training data, mostly aggregated from the internet, frequently reflects Western, English-language bias, underrepresenting voices from Africa, Latin America and women or minorities.

Equally, The Dead Internet Theory suggests a growing share of online content is automated. We now have bots spamming forums, social media and comment sections, making the web largely synthetic. Combined with 'AI Slop' - mass-produced, low value content - these trends indicate the technology is drowning out the very human creativity it has been designed to enhance.

Global Governance & Regulation

With the rise in these threats to positive consumer and business impacts comes more regulation and governance. This regulatory landscape is rapidly evolving and, as we draw to the end of 2025, remains fragmented. However, early signs show that as we progress through 2026, they will continue to align globally.

- European Union: The 'AI Act' (1 August 2024) imposes risk-level regulation, banning unacceptable AI, requiring strict governance for high risk applications and transparency for general-purpose systems. Additionally, (The) 'Framework Convention on AI and Human Rights' (Sept 2024) signed by 50 countries including the UK, United States and Canada, sets binding principles for AI governance aligned with democratic values.
- United States: Conversely, the US has no federal code yet, rather a patchwork of state laws passed in 2024 25. The AI Action Plan announced this year emphasises deregulation and export-led competitiveness
- China: 'Interim Measures on Generative AI' were adopted by China in August 2023, which mandates labelling of AI content and proposed a global AI governance framework at the 2025 WAIC summit.
- UK, Canada, Singapore, Australia, India: Each have released or are drafting AI strategy frameworks, often modelled on the EU risk based governance. The UK hosts an 'AI Safety Institute', while Singapore's 'Model AI Governance Framework' has been widely adopted. India has also announced the forthcoming implementation of its comprehensive 'Digital India Act'.

Generative AI adoption is climbing rapidly, rewriting the rules of creativity and productivity across global markets.

The Sustainability Promise

Whilst recognising the inevitable threats of new disruptive technology, AI has been increasingly linked as holding the potential to solve some of humanity's biggest challenges, most notably around ESG.

It's worth first underlining that AI's own energy footprint is substantial; large scale model training consumes vast amounts of electricity and water. Projected emissions could reach 18-246 million tons of CO₂ by 2035, rivalling US beef production. This is clearly an area the industry needs to address. Meanwhile though, the technology also holds sustainability solutions.

The UN's Sustainable Development Goals reports that AI aligns with 128 targets (health, education, agriculture, clean energy). However, it is the yet unwritten power of its creative data-fuelled thinking that could dictate new and unthought of solutions to how we, as a global society, consume our natural resources. If it can be harnessed for this positivity, then it may prove itself a legacy as well as transformative technology.

Summary

AI is weaving itself into business at an astronomical pace, from daily operations to corporate strategy. The global market is thriving, regional adoption expanding fast in Asia, Africa and Latin America, and case studies show productivity gains across multiple sectors. But the risks, from dead internet/slop, diversity bias, environmental footprint and uneven regulation, remain real.

However, when aligned with positive objectives that further human ingenuity and creativity, early signs are of a tremendous societal ally emerging. AI is already being shown as capable of tackling everything from sustainability goals, ethical design and accessibility to the benefit of people and communities. Its future is certain; it needs to be handled with care and responsibility.



Sources

- SQ Magazine (global AI market, adoption stats), July 2025
- Mordor Intelligence (market forecast), 2025
- Fortune Business Insights (AI growth projection), 2025
- Reddit/Tribune India via CPA Australia/ASSOCHAM report (India AI adoption plans), reddit.com, March 2025
- Financial Times / TechScape / Guardian (dead internet, slop, regulation conflict), 2025
- Dentons / Mindfoundry / World Summit AI (regulation & governance landscape), July 2025
- Wikipedia articles on AI Act, Framework Convention, safety institutes, 2025
- SAP CEO interview (enterprise leadership perspective), time.com, August 2025

AI IN GLOBAL MEETINGS & EVENTS

Scaling Immersion, Equity and Insight

Within the global meetings and events industry, artificial intelligence is no longer an optional extra, it's a structural accelerator. The themes planted in earlier variations of this report; personalisation (2017), the Virtual Experience Economy (2018) and the general movement around organisers' enduring hunger for immersive engagement, have created fertile ground for AI.

Post-pandemic expectations have cemented the Virtual Experience Economy. Even in live, in-person events, attendees now expect seamless digital integration. AI enriches these hybrid environments without replacing the human touch. From AI-driven matchmaking and personalised agendas to real-time translation layered over face-to-face exchanges, the industry is blending the digital and the physical. These tools ensure live events remain benchmarks of authenticity, spaces where unscripted dialogue and human connection counterbalance any artificial overlay.

However, the 'personalisation meets authenticity' trend creates a paradox. Authenticity implies something raw, human, imperfect; AI, in contrast, is by nature algorithmic and optimised. The tension is real. Yet when leveraged properly, with data about audience preferences, with skilled event professionals who understand human experience, plus ethical design, AI can significantly enhance immersion without eroding that human essence.

An indicator of how embedded AI already is can be found in AMEX's GBT 2025 Global Meetings & Events Forecast, which cites that 50% of meeting planners globally now report actively embracing AI tools, with usage ranging from attendee matchmaking (42%) to content creation (41%), theme development (40%) and tracking engagement through data analytics (39%). Equally, WifiTalents' survey reveals that approximately 65% of planners believe AI improves personalisation, while AI-driven analytics are helping increase ROI and refine experience design.



Intersection of AI and DE&I in Global Events

AI enriches hybrid environments without replacing the human touch. When leveraged with data, skilled professionals, and ethical design, it can significantly enhance immersion without eroding authenticity.

One of AI's most potent opportunities lies in bolstering Diversity, Equity and Inclusion (DE&I) practices. While paradoxically, one of its main drawbacks is its bias towards less marginalised communities, AI can be used to surface voices and stories that might otherwise be forgotten across speaker selection, content curation and audience profiling. For example, by analysing prior programme data, AI tools can suggest more varied speaker line-ups, or highlight content gaps regarding gender, ethnicity, regional representation or disability.

But there are dangers too. Any bias in training data or algorithmic design can perpetuate existing exclusions. Recent academic work (meta-analyses on accessibility datasets) has shown many AI-infused systems continue to underrepresent certain demographics - older adults, people with disabilities or non-Western racial or ethnic groups - in both data input and model outcomes. As one workshop on mitigating AI bias in accessibility observed, AI systems often mirror the bias of their creators unless there is proactive design for fairness and inclusive representation.

Thus, aligning AI with DE&I demands intentional strategies: inclusive data, oversight, and transparency. Event organisers can leverage AI to bring new voices forward, but they also must guard against algorithmic exclusion.

Automation, Accessibility and Cultural Variance

Meanwhile, automation in logistics and operations is transforming event delivery. Facial recognition and contactless check-ins reduce wait times; AI-led session scheduling adapts in real time to attendee feedback, while matching platforms connect delegates based on interests or goals. These efficiencies free up human energy to focus on experience and could underpin the industry's continued trajectory of growth.

At the same time, things like accessibility tools, real-time translation, closed-captioning, AI sign language avatars and sensory adjustments for neurodiversity are no longer niche add-ons but central to broadening reach. As mentioned in the section on Exceptional Experiences, for global events, they are key. Only when participants across multiple geographies can be fully included do events gain both scale and richness.

Yet adoption of these capabilities varies significantly by region. In mature markets (North America, Western Europe, parts of Asia Pacific), AI-powered personalisation, automation and accessibility tools are becoming standard. In emerging markets, infrastructural constraints (internet reliability, cost of AI licence tools, data governance regimes) slow uptake. Cultural attitudes toward privacy, trust in algorithms and regulatory environments (especially around facial recognition or behavioural data) also differ.

Organisers deploying AI globally must adapt; what works in Singapore may be inappropriate or even illegal in parts of Africa or Latin America without careful local calibration.

Accessibility tools like real-time translation, captions, and sensory adjustments are no longer niche add-ons—they are central to broadening reach and creating truly global events

Post-Event Analytics: ROI, Learning and Iteration

The technology's value does not end when the lights go down. Post-event analytics are increasingly important for understanding what drives engagement, satisfaction and ultimately ROI. Organisers are using AI to identify which sessions had the highest attendance, which speaker traits drive positive feedback and which networking formats yield longterm business connections. Predictive modelling helps forecast what next year's audience will expect.

Data drawn from AI tools also lets organisers refine content, adjust formats and personalise future communications. The feedback loop becomes faster, more precise. For sponsors and venues, this kind of insight also increases the value proposition; they can see evidence of impact rather than simply reach.

Ethical Governance, Human Oversight and Trust

As AI becomes more deeply woven into every aspect of events, from planning to participation to post-event review, the imperatives of trust, privacy and ethics grow. Principles like consent (especially for facial or behavioural data), transparency (how profiles are built, how matches are made), inclusive AI design (to reduce bias) and retaining human oversight (especially in areas like content programming or dispute resolution) are essential.

Events that ignore these are risking damage to authenticity and reputation. Conversely, those that build in governance frameworks tend to win long-term trust and loyalty.



Sources

- American Express GBT, Meetings & Events 2025 Global Forecast (2024), insights on AI adoption, budgets, personalization, 2025
- Wifitalents, AI in the Events Industry Statistics, 2025, percentages on personalization, matchmaking, engagement, 2025
- Gitnux, AI in the Events Industry Statistics Market Data Report, 2025, ROI improvements, planning efficiency, attendee engagement, Gitnux, 2025
- Rethink Ability, Mitigating AI Bias in Accessibility Workshop, tool-design, inclusive frameworks, Rethink Ability, 2025
- Academic Meta-analysis: Data Representativeness in Accessibility Datasets, showing gaps in gender, race & age in AI training sets, arXiv 2025
- ALISE Conference Proceedings, Fairness and Biases in AI Algorithms, implications for content selection, interface bias, iopn.library.illinois.edu, 2025

EVENT TECHNOLOGY

Underpinning these trends are a raft of new products and services that have been developed to integrate the power of AI technology to the benefit of events planners.

AI powered matchmaking platforms like Swapcard and Brella use attendee preferences and behaviour to create personalised networking opportunities without replacing face to face dialogue. Content curation tools such as Grip AI help filter relevant sessions and speakers, allowing organisers to maintain programme integrity while avoiding 'AI slop' and bias.

In terms of AI driven accessibility tools, real time translation services such as Wordly AI, Kudo and My Clear Text have enabled simultaneous multilingual participation. At the same time, captioning and transcription tools, now integrated into virtual and hybrid platforms, assist both hearing impaired attendees and those for whom the event language is not native. In addition, AI sign language avatars and sensory adjustment technology for neurodiverse participants are emerging as part of the industry's inclusivity push.

In terms of operational efficiency, this too is quickly being transformed by AI and automation. Facial recognition check in systems from providers like Facia.ai and AnyVision reduce queues and improve security at scale. Predictive analytics platforms such as Zenus AI help manage crowd flow, staffing and energy use.

Finally, and again leaning towards the sustainability and ethical innovation agenda, 'green' event design has moved from aspiration to operational reality. AI powered resource tracking platforms like TRACE by isla monitor carbon impact, energy consumption and waste in real time. Some venues now integrate smart grid energy management systems to optimise power usage during events. The possibilities here, as cited in previous sections of this report, are limitless.

The events industry is leveraging technology to enhance human connection while meeting environmental and social goals. The key to lasting impact lies in balancing innovation with authenticity, inclusivity and sustainability, ensuring technology amplifies rather than replaces the value of live experiences

Sources

- Eventflare, Cvent, Convene – AI matchmaking, logistics and personalisation (eventflare.io, convene.com), July 2025
- Facia.ai – facial recognition in events (facia.ai), July 2025
- Isla TRACE – sustainable event tracking (weareisla.co.uk), 2025
- Academic research on AI energy use and bias (arxiv.org), June 2020
- ALISE Conference Proceedings, Fairness and Biases in AI Algorithms, implications for content selection, interface bias, iopn.library.illinois.edu, 2025

BANKING & FINANCE

Stability, Strategy and the Role of Events in 2026

As we move into the final quarter of 2025, the global banking and finance industry is experiencing a period of relative strength and strategic recalibration. Despite persistent macroeconomic uncertainties, the sector has proven resilient, driven by interest rate tailwinds, digitisation and shifting consumer expectations. Its continued health signals confidence not only within financial markets but across adjacent sectors, including global meetings and events which depend on the sector's appetite for connection, storytelling and brand-building.



Economic Outlook: Earnings Up, Caution Ahead

Banks globally have shown solid performance in 2025. Net Interest Income (NII) remains a key contributor, as interest rates, while expected to stabilise, are still elevated compared to pre pandemic norms. In the United States, S&P Global forecasts 5.7% NII growth before the end of 2025, a rebound from 2024's near-stagnation, while Bank of America has projected record growth of 6-7%.

European banks, too, are proving resilient. The European Banking Authority's 2025 stress test revealed nearly all major EU banks could survive a 6.3% GDP decline, with only one falling below core capital requirements under extreme scenarios.

This broad-based resilience provides a stable foundation from which banks can plan future investments, including their global engagement strategies. However, there is still a sense of caution. Elevated funding costs, regulatory scrutiny and uneven credit demand, particularly in auto loans and small business lending, are expected to temper aggressive expansion in some markets.

The New Face of Banking

According to Deloitte's 2025 Outlook, the banking industry's most pressing shift is toward platform-based, technology-powered delivery models. Banks are now navigating not just financial headwinds, but also consumer-led transformation. Customers are seeking faster, more autonomous services, many enabled by AI, embedded finance and open banking ecosystems.

In PwC's Financial Services Trends Report, banks are encouraged to differentiate through tech, data and values. ESG commitments, financial inclusion strategies and hyper-personalisation all play an increasing role in shaping brand and business models. These factors, PwC notes, will ultimately "redefine the contract between consumers and banks".

Unsurprisingly, AI adoption is particularly significant. A 2025 academic review highlights widespread experimentation with generative AI used in personalised financial advice, fraud detection and compliance automation. Yet concerns remain around bias, hallucination and regulatory gaps. At the same time, cybersecurity continues to be a top priority, with new vulnerabilities emerging around voice cloning, deepfakes and advanced phishing attacks. In short, banks are not only becoming smarter, they are also becoming more aware of the importance of trust, transparency and human connection in an increasingly digital economy. This is our first hint towards a more purposeful engagement with the live meetings and events industry.

Banks are now navigating not just financial headwinds, but also consumer-led transformation.



ESG & Green Finance: Mixed Momentum

Before that, it's worth touching on sustainability, which remains a key but uneven force across the sector. While Barclays' 2025 exit from the Net-Zero Banking Alliance (NZBA) drew sharp media criticism, many other global institutions remain committed to green transition finance. London and Singapore, for instance, are both positioning themselves as leaders in green finance ecosystems, supported by climate-aligned bond frameworks and capital markets initiatives. ESG remains a highly relevant conversation, one that is helping to shape conferences, policy roundtables and sustainability forums worldwide.

Meetings & Events: A Sector Ready to Engage

From capital markets briefings and shareholder meetings to fintech showcases and leadership forums, the global meetings and events industry is deeply intertwined with banking. This year's upward earnings trajectory, combined with a renewed focus on digital transformation, ESG storytelling and customer intimacy, makes 2026 a fertile ground for strategic engagement.

The meetings and events industry and Banking & Finance have long held a symbiotic relationship and data points towards a continuation of this trend. This is a market that is not just investing in events but redefining its relationship with them. Meetings are no longer just operational; they're strategic platforms to engage customers, stakeholders and employees during this continued period of profound change.



Meetings are no longer just operational; they're strategic platforms to engage customers, stakeholders and employees during this continued period of profound change.



Sources

- BCG: *The Future of Finance*, 2025
- S&P Global U.S. Bank Outlook, 2025
- Reuters: *Bank of America NII Forecast*, 2025
- FDIC *Quarterly Banking Profile Q1*, 2025
- Deloitte *2025 Banking Outlook*, 2025
- PwC *Banking and Capital Markets Trends*, 2025
- Reuters: *EU Bank Stress Tests*, 2025
- FT: *Barclays Exits NZBA*, 2025
- TIME: *Green Wall Street and London*, 2025
- Financial News London: *2025 Opportunities*, 2025
- arXiv: *GenAI in Banking*, March 2025
- arXiv: *Cybersecurity in Finance*, April 2025
- ALISE Conference Proceedings, *Fairness and Biases in AI Algorithms, implications for content selection, interface bias*. iopn.library.illinois.edu, 2025

ESPORTS & GAMING

Phygital Integration Begins

According to Reuters, in 2024 the global gaming industry generated \$187.7 billion in revenue, just a modest 2.1% increase from 2023, as growth was tempered by sluggish console sales and limited new release schedules.

Looking ahead to 2025, Newzoo, an excellent source, projects a return to form for the market as it looks at an expansion to \$188.9 billion and a 3.4% year-on-year rise. This is positive news for a sector which this report continues to return to, both as a reference for a contemporary industry with unique dynamics and one which continues to lead the way in how brands deal with both a physical and digital world.

According to Udonis, the global gaming market is expected to approach \$200 billion in 2025 and reach \$205 billion by 2026. This, in turn points towards positive outcomes in Esports.

Esports revenue will reach
US \$7.46 Billion
 by 2030

Cloud gaming expected
 to generate
US \$10.5 Billion
 in 2025 and double by 2029.

Esports Sector: Explosive Potential

In terms of this sector specifically, as well as its fascinating dynamics for those working in live events, Esports remains a subsegment with high growth potential. A Grand View Research report estimates esports revenue will reach \$7.46 billion by 2030, driven by strong CAGR of 23.1%. Precedence Research offers a broader forecast, from \$6.6 billion in 2024 to \$48 billion by 2034.

The spillover effects for the broader meetings and events industry are many and include:

- **Sponsorship & Brand Activation:** The global pivot of esports is attracting diverse sponsors, including sectors like automotive, airlines and petrochemicals, as revealed by Badvertising, which noted at least 33 deals since 2017.
- **Hybrid & Phygital Integration:** Gaming's continued use of hybrid formats, coupled with the rising trajectory of cloud gaming, expected to generate \$10.5 billion in 2025 and double by 2029, reinforce immersive, multi-modal event design. Phygital sport models like the Metaverse Gaming League, blending VR/AR, physical arenas and esports, further blur the line, offering uniquely engaging formats.
- **Global Versus Regional Growth Shifts:** Growth remains strongest in mobile gaming, while PC and console face harder markets. Esports and streaming markets, however, boast faster growth in Asia-Pacific and North America, regions key to meeting planners seeking cross-border engagement platforms.
- **Events Ecosystem & Spend on Global Meetings:** Today's esports mega-events, such as EWC, function much like traditional global sports tournaments, requiring venue build-out, sponsorship negotiation, attendee services and broadcast infrastructures. This intensifies the demand for event professionals and is likely boosting spend in global meetings and events. As event budgets grow and in-person meeting demand resurfaces, synergies with esports event infrastructure are becoming more pronounced.

There is so much to extract from the Esports and Gaming industry and to apply to meetings and events. The trajectory of the industry will increasingly bring in the need for specialist agencies that understand the blend between live and online and how these activations can be managed for an increasing number of brands.

It remains a sector to be interested and inspired by.

Sources

- Newzoo / Reuters on gaming market growth and projections (2025–2027)
- Q1 2025 market shifts: PC/console decline, mobile growth Newzoo, 2025
- Esports market forecasts by Grand View Research and Precedence Research, 2025
- Esports World Cup 2024 and 2025 event details and prize pools, 2025
- Cloud gaming growth projections N-iX Games, 2025
- Phygital sport and Metaverse Gaming League as hybrid event examples Wikipedia, 2025
- Badvertising report on polluter advertising in esports The Guardian, 2025

INFORMATION & COMMUNICATIONS TECHNOLOGY

Connectivity, Complexity and the Human Response

According to Global Growth's Strategic Spending report, the global information and communications technology (ICT) sector remains one of the most dynamic and consequential industries as we near the end of 2025. A convergence of artificial intelligence, quantum computing, cybersecurity, cloud infrastructure and continued chip innovation is driving expansion at pace, even amid geopolitical uncertainty and energy constraints. These advances are not only reshaping economies and industries, they are also redrawing the role of human connection, with significant implications for the global meetings and events sector.

According to the International Data Corporation (IDC), global ICT spending is forecast to reach US \$5.9 trillion in 2025, growing at an annual rate of 6.4%, a sharp rise compared to the 3.5% increase seen in 2023–24. Enterprise IT spending now outpaces consumer IT for the first time since the pandemic, as organisations increase investment in AI, cybersecurity and hybrid infrastructure to support digital transformation and resilience strategies.

Predictably, driving this growth is the acceleration of AI technology. As per Gartner's 2025 ICT outlook, more than 75% of enterprises worldwide are piloting or scaling AI, with budgets rising by over 35% YoY in sectors such as finance, logistics, healthcare and government. This is creating demand for skilled professionals, cross-sector learning and collaborative knowledge platforms; opportunities that favour business events and professional meetings as high-value tools for innovation diffusion.

The semiconductor industry continues to act as the backbone of ICT expansion. The Semiconductor Industry Association reports global chip sales are expected to grow 16.4% in 2025, reaching US \$630 billion, fuelled by demand from AI models, electric vehicles, robotics and edge computing. While the US CHIPS and Science Act continues to funnel billions into domestic manufacturing, Asia, particularly Taiwan, South Korea, and increasingly India, retains a dominant production base. Europe, meanwhile, is accelerating its Chips Act strategy, with €43 billion allocated to boost local design and fabrication capacity by 2030.

The events industry has supported conversations throughout the ICT sector, looking at the growth and success of events such as SEMICON Europa, Computex, and of course Mobile World Congress. These events have both represented these industries but also looked to reflect them, with investments in hybrid delivery options to accommodate rising demand from buyers and R&D teams seeking direct engagement with global supply chains.

EE

ICT's continued expansion presents a dual opportunity for the global meetings and events industry, both to serve as the physical interface for one of the most powerful and fast-evolving industries in the world and to curate human experiences that help attendees navigate its complexities.

EE

Data, Energy, and the Green Challenge

In the meantime, digital transformation continues to increase global data traffic. By the end of 2025, data consumption is projected to hit 200 zettabytes (a trillion gigabytes or a billion terabytes), according to IDC, double that of 2022. The explosion in generative AI, IoT (Internet of Things) devices and streaming, has placed intense pressure on data centres, which now account for around 3.5% of global electricity use. The International Energy Agency warns that without efficiency improvements this could double by 2030.

This creates a paradox: ICT innovation supports decarbonisation through optimisation and automation, yet it also drives energy use. Event professionals working with ICT clients are seeing growing interest in how to convene responsibly, whether through low-carbon travel, digital twin venues, or programming around climate technology, one of the fastest-growing tracks at industry summits worldwide.



Global ICT spending is forecast to reach
US \$5.9 Trillion
in 2025

Annual growth rate
6.4%

More than
75%
of enterprises worldwide are piloting or scaling AI

Global chip sales are expected to grow
16.4%
in 2025

Data consumption is projected to hit
200
zettabytes

The Global Outlook: Fragmented Yet Focused

Regionally, ICT growth remains uneven. North America leads on AI R&D and software services, with the United States forecast to increase ICT investment by 7.1% before the end of the year. The Asia-Pacific region, despite trade and regulatory friction, is seeing a resurgence in manufacturing and innovation, particularly in India's rising tech ecosystem, now the world's third-largest startup hub.

Meanwhile, China's ICT sector remains resilient despite chip sanctions. It is doubling down on domestic chip design and AI model training and Chinese firms are investing heavily in alternative architectures and open-source platforms. At the same time, Europe is focused on strategic autonomy, digital sovereignty and green ICT, creating significant funding for cloud infrastructure, quantum computing and sustainability-focused tech ventures.

All these developments underscore a need for cross-border engagement, which remains a key driver of international business travel and knowledge-sharing events. The ICT sector's growing complexity is feeding a demand for vertical-specific conferences, whether in fintech, healthtech, edtech, or mobility, alongside large-format showcases.

At the same time, as the ICT world grows more complex, some individuals continue to retreat from the 'always-on culture'. The 'dumb phone revival', covered in this report

last year continues in 2025, particularly among Gen Z and younger Millennials. According to a recent Deloitte Digital Lifestyles report, 14% of smartphone users in North America and Europe have downgraded to feature phones with basic functions like texts.

This isn't merely a novelty trend. It reflects growing anxiety around surveillance, overstimulation and the erosion of social connection. For the meetings industry, this signals a subtle but important shift: a renewed desire for authentic human-centred experiences. Expect growing demand for distraction-free venues, low-tech formats, analogue creative sessions and wellbeing-driven programming, especially at leadership retreats and purpose-driven summits.

What This Means for Events

ICT's continued expansion presents a dual opportunity for the global meetings and events industry, both to serve as the physical interface for one of the most powerful and fast-evolving industries in the world and to curate human experiences that help attendees navigate its complexities.

Organisers working with ICT clients should anticipate increased budgets but also higher expectations, especially around content sophistication, tech integration and ROI measurement. At the same time, planners must continue to address emerging attendee needs such as wellness, offering a break from the very technologies their industries produce. The ICT sector thrives on innovation. The events industry, as its mirror and meeting ground, must continue to do the same.



Sources:

- IDC (2025). Worldwide ICT Spending Guide, 2025
- Gartner (2025). Strategic Tech Trends for 2025
- Semiconductor Industry Association (2025). 2025 Semiconductor Market Outlook, 2025
- International Energy Agency (2024). Electricity 2024 Report, 2024
- Deloitte (2025). Digital Lifestyles Report, 2025
- World Economic Forum (2024). Digital and Energy Transition Brief, 2024
- Altradius (2024). ICT Sector Market Monitor, 2024
- European Commission (2025). EU Chips Act Strategy, 2025

PHARMACEUTICALS

Intelligent Growth and Interconnected Futures

The global pharmaceutical industry enters late 2025 in a phase of strategic expansion buoyed by innovation, restructured investment and evolving population health needs. With forecasts suggesting the global market will exceed \$1.6 trillion by the end of 2025, this is a sector that continues to influence the global knowledge economy and, by extension, the meetings and events sector that supports its communication and collaboration needs.

According to the latest *Global Use of Medicines 2025 Outlook* by IQVIA, total pharmaceutical spending is expected to grow at 4.6% (CARG) through 2028, reaching \$2.3 trillion. Notably, growth is no longer purely volume driven. Increasingly, it reflects high-value therapies, complex specialty treatments and AI-led efficiencies. These are sophisticated narratives requiring equally sophisticated forums, exhibitions and stakeholder engagement, precisely where meetings and events play a vital role.

Orphan Drugs: Resilience in a Refined Market

Orphan drugs remain a high-value niche within pharma. Although Evaluate Pharma's 2025 Orphan Drug Report confirms growth has slowed slightly from the highs of the past decade, these drugs are still expected to contribute nearly 20% of global prescription sales by 2028, generating over \$280 billion. While the era of explosive growth may be behind us, the sector continues to show dynamism in innovation and patient-specific focus.

This segment's success rests not just on scientific development but also on collaboration across regulatory, healthcare and technological domains, making it inherently event intensive. As rare disease conferences, niche scientific congresses and patient advocacy gatherings grow, event planners must increasingly operate at the intersection of scientific rigour and empathetic engagement.

Moreover, regulatory innovation continues. In June 2025, the European Medicines Agency (EMA) introduced a fast-track approval framework for certain ultra-rare diseases, echoing similar moves in the United States and Asia. Regulatory evolution like this feeds into knowledge-sharing ecosystems and cross-sector conversations, again instigating the need for credible event platforms to align stakeholders.



Global market will exceed
US \$1.6 Trillion
by the end of 2025

Total pharmaceutical spending
is expected to grow at
4.6%
through 2028

More than
65%
of global pharma firms now
use generative AI

Spending on AI-enabled drug
discovery has exceeded
US \$3.5 Billion
in 2025

AI, Data, and the Digitisation of Pharma

The continued infusion of Artificial Intelligence, machine learning and digital health tools is reshaping pharmaceutical R&D. A July 2025 report by McKinsey, *Pharma's Digital Future: Beyond Automation*, notes that more than 65% of global pharma firms now use generative AI or similar tools in their clinical development pipeline. Spending on AI-enabled drug discovery has exceeded \$3.5 billion in 2025, with companies like Recursion and Insilico Medicine leading the charge on algorithm-driven compound identification.

The implications for meetings and events are clear. Not only does this encourage a whole new class of hybrid conferences, hackathons and multi-sector gatherings, it also drives convergence with ICT and IoT (Internet of Things). From cloud infrastructure to wearable-enabled clinical trials, pharma is now as much about data as it is about drugs. According to Deloitte's 2025 Healthcare Convergence Index, more than 40% of pharma executives now consider collaboration with tech companies a top strategic priority. This signals new demands for content-rich, secure and interdisciplinary event environments where stakeholders from biotech, big tech, academia and policy can meaningfully collaborate.

Chronic Disease, Ageing, and the Expanding Healthcare Mandate

Chronic diseases remain the industry's main long-term driver. The World Health Organization (WHO) projects that by 2030, NCDs such as diabetes, heart disease and cancer will account for 75% of all global deaths. Pharmaceutical companies are investing heavily in long-term therapeutics and disease management solutions, an area where lifestyle, technology and behavioural science intersect.

The ageing of the global population accelerates this (see previous section on demography and the ageing population). Pharmaceutical firms are responding with age-specific therapies and preventive strategies, while also participating in debates around health equity, care infrastructure and policy; discussions that could again benefit from live spaces.

Conclusion: Pharma's Expanding Role - and Ours

The pharmaceutical sector in 2025 was characterised by innovation, convergence and complexity. It is a sector that now interacts as fluently with data engineers and policymakers as it does with clinicians and patients. It is precisely this fluidity that makes it such a compelling and essential client for the global meetings and events industry.

From the design of high-science congresses to the facilitation of AI think tanks and from regulatory forums to patient engagement platforms, event professionals working in pharma must be fluent in both detail and nuance. The opportunities are as rich as they are sophisticated.



Sources

- Evaluate Pharma, *Orphan Drug Report 2025, 2025*
- IQVIA, *Global Use of Medicines Outlook 2025-2028*
- McKinsey & Co., *Pharma's Digital Future: Beyond Automation, 2025*
- PwC, *Pharma & Life Sciences Deals Insights Q2 2025, 2025*
- Deloitte, *Healthcare Convergence Index 2025, 2025*
- World Health Organization (2025), 2025

EXPERIENCE TRENDS

CORPORATE EVENTS

Confidence, Creativity and Evolving Metrics

Corporate events continue to command significant investment, reflecting the continuing increase in trust by brands for events as a critical part of marketing and customer engagement strategies. This is a trend highlighted in this report continually over the last decade and should indicate good news for the long-term future of the meetings and events industry. The reality is that behind every event is business or brand finance; owning, sponsoring and sometimes paying bursaries for attendees.

According to AJ Bell's Marketing Spend Outlook 2025, UK and United States businesses expect to increase live and experiential budgets by 6-8% by the end of 2025, outpacing traditional advertising growth. A similar picture emerges in Asia, where Campaign Asia reported 72% of Chief Marketing Officers (CMOs) plan to prioritise in-person activations over static media, citing higher customer resonance.ences, exceeding returns from most digital-only campaigns.

In Africa, brands are also turning to live formats. The Africa Report (2025) notes that fintech and telecom companies in Nigeria and Kenya are shifting spend to experiential roadshows and community festivals as competition intensifies.

This confidence in events stems from clear evidence on ROI. ICE's Annual Benchmarking Research Report 2025, produced with Cvent, highlights that 58% of corporate planners recorded an improved return on experience (ROE) compared with the previous year, with strong correlations between investment level and post-event sales uplift. Latin American data echoes the trend; AMPRO, Brazil's association for live marketing, reports average ROIs of 3:1 for large-scale brand experiences, exceeding returns from most digital-only campaigns.



From Logistics to Cultural Capital

The nature of these investments is also evolving. Rather than seeing events purely as logistics, brands increasingly frame them as cultural statements. High-production, visually arresting activations such as immersive pop-ups by luxury fashion houses in Dubai, or sustainability-themed product launches in Johannesburg, underline how experiences link brands with culture and community. Research by the Middle East Event Show (2025) found 64% of corporate organisers in the Gulf now prioritise 'artistic and cultural relevance' as a KPI for flagship events.

Finally, and as covered in previous sections, technology is further bolstering this shift. ICE's data shows 41% of planners already use AI for content generation or logistics, with early adopters in Asia deploying machine learning to personalise delegate journeys. Latin American agencies are combining AI with local artistry to produce hybrid activations that scale globally while retaining regional flavour.

Measuring Impact Beyond the Day

While attendee satisfaction remains the most widely used success metric (93.5% of ICE respondents), there is growing momentum behind deeper measures such as behaviour change, customer lifetime value and community impact. Bizzabo's Global Event Marketing Insights 2025 notes a 20% rise in firms tracking long-term brand affinity after experiential campaigns. However, only 37% of ICE respondents use sentiment or engagement data post-event and fewer than one in five integrate post event analytics into their evaluation.

This lag represents untapped potential. As ICE argues, the true value of events lies in shifting loyalty and motivation after the curtains close. Brands in Asia Pacific and Latin America are pioneering here; an Indonesian bank recently used geolocation data to study repeat store visits after a retail pop-up, while Mexican automakers are pairing post-event surveys with sales conversion data to quantify influence.

The opinion of brands and businesses on the efficacy, values and dynamism of live events should not be underestimated. This section represents one of a number of good news stories that should have meetings and events professionals feeling ambitious for 2026. It is a trend that has started and accelerated - as an industry, we need to continue to drive this momentum.



Sources

- AJ Bell, *Marketing Spend Outlook 2025*, Jan 2025
- ICE & Cvent, *Annual Benchmarking Research Report 2025*, July 2025
- Campaign Asia, "CMO priorities shift to experiential," Feb 2025
- The Africa Report, "Fintech brands bet on live events," Apr 2025
- AMPRO (Brazil), "ROI in live marketing 2025," May 2025
- Middle East Event Show, *Corporate Event Trends 2025*, June 2025
- Bizzabo, *Global Event Marketing Insights 2025*, Mar 2025

UK and United States businesses expect to increase live and experiential budgets by

6–8%
by the end of 2025

72%

of Chief Marketing Officers (CMOs) plan to prioritise in-person activations over static media

58%

of corporate planners recorded an improved return on experience (ROE) compared with the previous year

41%

of planners already use AI for content generation or logistics

Attendee Satisfaction

remains the most widely used success metric (93.5% of ICE respondents)

20%

rise in firms tracking long-term brand affinity after experiential campaigns.

ASSOCIATION MEETINGS

Where Tradition Meets Innovation

The association market remains a fascinating segment within the global meetings and events sector and one that is always a pleasure to reflect upon. Like other areas of this report, it provides insight that is reflective of wider industry trends.

Our guide through this sector is ICCA, which remains an excellent source of information, insight and comment, and whose rankings once again paint an intriguing picture on the destination landscape of meetings and events in 2026.

The figures, taken from meetings in 2024 and released in 2025, form part of this report as we near the end of the year. They show that destinations, formats and attendee expectations are shifting rapidly, influenced by incentive travel trends, sustainability imperatives and a hunger for richer experiences. Rather than simply convening experts, today's meetings are places where learning, culture and purpose intertwine.

Delegates increasingly want meetings that double as cultural journeys, where professional dialogue sits comfortably alongside discovery.

Destinations on the Move

ICCA's Country and City Rankings reveal an increasingly competitive map. Vienna reclaimed the global lead with 154 congresses, followed closely by Lisbon (153) and Singapore (144). Beyond Europe, secondary destinations in Asia, the Middle East and Oceania are emerging as serious contenders. Singapore remains a powerhouse, while Dubai, Bali and Melbourne are drawing associations with their blend of large-scale venues and lifestyle appeal. Average delegate numbers are rising in these markets, challenging the long-standing dominance of the United States, UK and Germany in attendance figures.

Incentive Travel's Influence

One of the most striking shifts is the cross-pollination between incentive travel and association events. Delegates increasingly want meetings that double as cultural journeys. Planners are responding with programmes that integrate local heritage walks, market tours and culinary masterclasses into the congress schedule. Many continue to design more sophisticated pre- or post-congress days to allow for family or leisure time, echoing trends documented in the SITE/IRF/FICP Incentive Travel Index 2025.

This expectation for blended purpose means destinations must offer more than logistics. Safety, hospitality and connectivity are baseline requirements, but cultural depth, wellness opportunities and memorable scenery are climbing the priority list. Associations are looking for places where professional dialogue can sit comfortably alongside discovery.



Inside the Meeting Room

As the agenda widens, so too does the shape of the meeting itself. Traditional plenaries remain but are being complemented by a tapestry of formats; deep-dive tracks, practical workshops and live case studies all continue to grow their footprint. They are also taking place in and around more interesting settings, from pop-up theatres to heritage rooms within unique venues.

Attendees also expect more flexible pacing. Coffee lounges, wellness corners and quiet zones are replacing the rigid coffee break. Networking is woven through sessions rather than being confined to receptions, making events feel less like a duty and more like an experience.

This move is clearly being welcomed by delegates; research by MeetingMentor reports 65% of planners expect attendance to grow this year, with meetings of more than 500 people accounting for a significant share, while mid-sized gatherings (100-250 delegates) are rebounding strongly

Technology is no longer just a tool—it's a differentiator, turning hybrid participation into a premium experience through personalization and real-time engagement.

Technology and Personalisation

Technology continues to reshape both delivery and engagement. Live polling and real-time feedback apps help organisers adjust sessions on the fly, while Artificial Intelligence is beginning to personalise itineraries based on a delegate's stated interests or past attendance. Hybrid participation, once a stopgap, is now integrated into design: livestreaming is high-definition, breakout discussions can include on-screen contributors, and virtual attendees often receive tailored networking opportunities. Maritz's Top Trends 2025 report notes the quality of these interactions is becoming a differentiator between a standard meeting and one perceived as premium.

Sustainability, Wellness, and Legacy

At the same time, responsibility is now embedded in site selection and programme design. Associations are increasingly evaluating venues on energy use, waste reduction and social legacy programmes. More events incorporate local volunteering or scholarship schemes, turning meetings into vehicles for community benefit, while wellness, once a side note, is now part of the value proposition. Organisers are curating mindful session pacing, outdoor networking and childcare options so participants can focus without sacrificing balance.

Operational Pressures

However, against this backdrop of creativity lie significant headwinds. Shorter lead times are compressing planning windows, particularly as boards approve budgets later in the cycle. Inflation in accommodation, food and transport is testing financial models; MeetingsNet reports cost growth above the rate of general inflation in several top-tier cities. Meanwhile, geopolitical tensions and administrative hurdles, from visa delays to new security requirements, continue to complicate international attendance. IAPCO's 2025 survey found nearly 60% of professional congress organisers see instability as a risk to long-term scheduling.

Looking Ahead

Taken together, these forces suggest association meetings are moving into an era defined by relevance and responsibility. Destinations that marry connectivity, safety and cultural richness are winning bids. Delegates are choosing events not just for content but for the experience of being there and often stay longer. Hybrid technology is ensuring those who cannot travel can still contribute meaningfully, while sustainability and wellness are framing how success is judged.

Associations that thrive will be those willing to embrace this complexity. They will craft programmes that respect tradition while innovating in format, invest in destinations aligned with their values and use technology to enhance rather than replace the human connection that remains at the heart of every meeting.



Sources

- ICCA, 2024 Country & City Rankings / GlobeWatch: Business Analytics Report, 2025
- Vienna Convention Bureau, Economic Impact of Congresses 2024, 2025
- IAMsterdam, Amsterdam Strengthens ICCA Ranking, 2025
- Meeting Media Group, Bruges Growth in ICCA Rankings, 2025
- Travel Daily News, ICCA Rankings 2024: Cities and Countries, 2025
- MeetingMentor Magazine, Hopes and Headcounts on the Rise, Mar 2025
- Maritz, Top Trends 2025
- IAPCO, Global Socio-Political Impact Survey 2025
- MeetingsNet, How Much Will Meeting Costs Go Up in 2025?
- Bizzabo, Global Event Marketing Insights 2025, Mar 2025

INCENTIVE TRAVEL

Growth, Responsibility, and New Horizons

The latest Incentive Travel Index 2025 by the Society for Incentive Travel Excellence (SITE), Incentive Research Foundation (IRF) and FICP signals a sector that remains impressively resilient. Global corporate confidence in incentive travel as a driver of performance is at its highest in a decade - 67% of respondents reported budget increases for 2025-26, despite broader caution in marketing and travel (SITE/IRF/FICP, 2025). A parallel report by CNBC earlier in the year confirmed Fortune 500 firms continue to prioritise incentives to retain top talent and build culture, even as they trim other discretionary spend.

This optimism reflects the measurable business value of incentives and the continuation of a highly positive trend tracked over the last few years in this report. The IRF's 2025 Pulse Survey found companies running structured reward trips saw an average 18% uplift in sales productivity versus peers, while retention among participants was 31% higher than company baselines. As organisations compete for scarce talent in a hybrid economy, immersive, high-touch experiences remain a proven lever.

Balancing Appeal, Safety and Sustainability

Yet growth comes with complexity. SITE's research highlights a persistent tension between delegates' appetite for discovery and planners' duty of care. 'Destination appeal' remains the top selection criterion (6.9/10), but 'safety, health and security' (6.0) and 'connectivity' (5.8) follow closely. Recent instability in parts of the Middle East and Eastern Europe, alongside elevated climate risks in Asia-Pacific, are shaping site selection.

Sustainability remains part of this calculus, though still inconsistently applied. The GBTA Business Travel & Meetings Outlook 2025 reports that 41% of corporates now set formal carbon goals for incentive programmes, up from 29% in 2023, but only a minority actively track emissions from long-haul trips. Some destinations are responding: Canada's Atlantic provinces have launched low-impact coastal retreat packages for groups, while Costa Rica and Rwanda are expanding conservation-linked incentive offerings. Local DMCs in Kenya and South Africa are also piloting 'leave no trace' safaris with verifiable carbon offsets (Africa Travel Week, 2025).



41% of corporates now set formal carbon goals for incentive programmes, up from 29% in 2023, but only a minority actively track emissions from long-haul trips.

Emerging and Shifting Destinations

These examples are highly relevant beyond just their modern approach to sustainability; they speak to a new spirit amongst delegates and planners. Delegates' appetite for fresh backdrops continues to drive geographic diversification.

According to Virtuoso's 2025 Luxury Report, Iceland, Vietnam and Colombia are rising stars for smaller, experience-led incentives, while Japan and South Korea remain stalwarts for tech-savvy groups. In the Americas, Canada's Banff and Québec City are winning bids for their mix of safety, outdoor adventure and sustainability credentials. Meanwhile, the UAE and Saudi Arabia are investing heavily in high-end resort infrastructure aimed at global reward programmes and secondary European cities (e.g. Porto, Kraków, Valencia) are luring planners seeking affordability without compromising cultural cachet.



Extended Stays and the 'Nomadic' Workforce

Another evolution tracked by this report is the contemporary approach both planners and delegates are taking. As hybrid working embeds, more professionals combine reward travel with remote work or family leisure. SITE notes a 24% increase in programmes encouraging business extensions. This echoes trends identified earlier in this report; as large events integrate coworking spaces, wellness areas and even childcare, participants see value in arriving earlier or lingering post-programme. For destinations this is a major win, meaning longer stays and deepening cultural impact.

Technology, Wellness and Experience Design

Meanwhile, technology is reshaping delivery. According to research from MPI, planners are using AI to personalise itineraries and forecast risks, while immersive tools from AR treasure hunts to VR pre-tours are enriching the build-up and on-site narrative. Parallel to this is the rise of wellness-centric incentives: the Global Wellness Institute (2025)

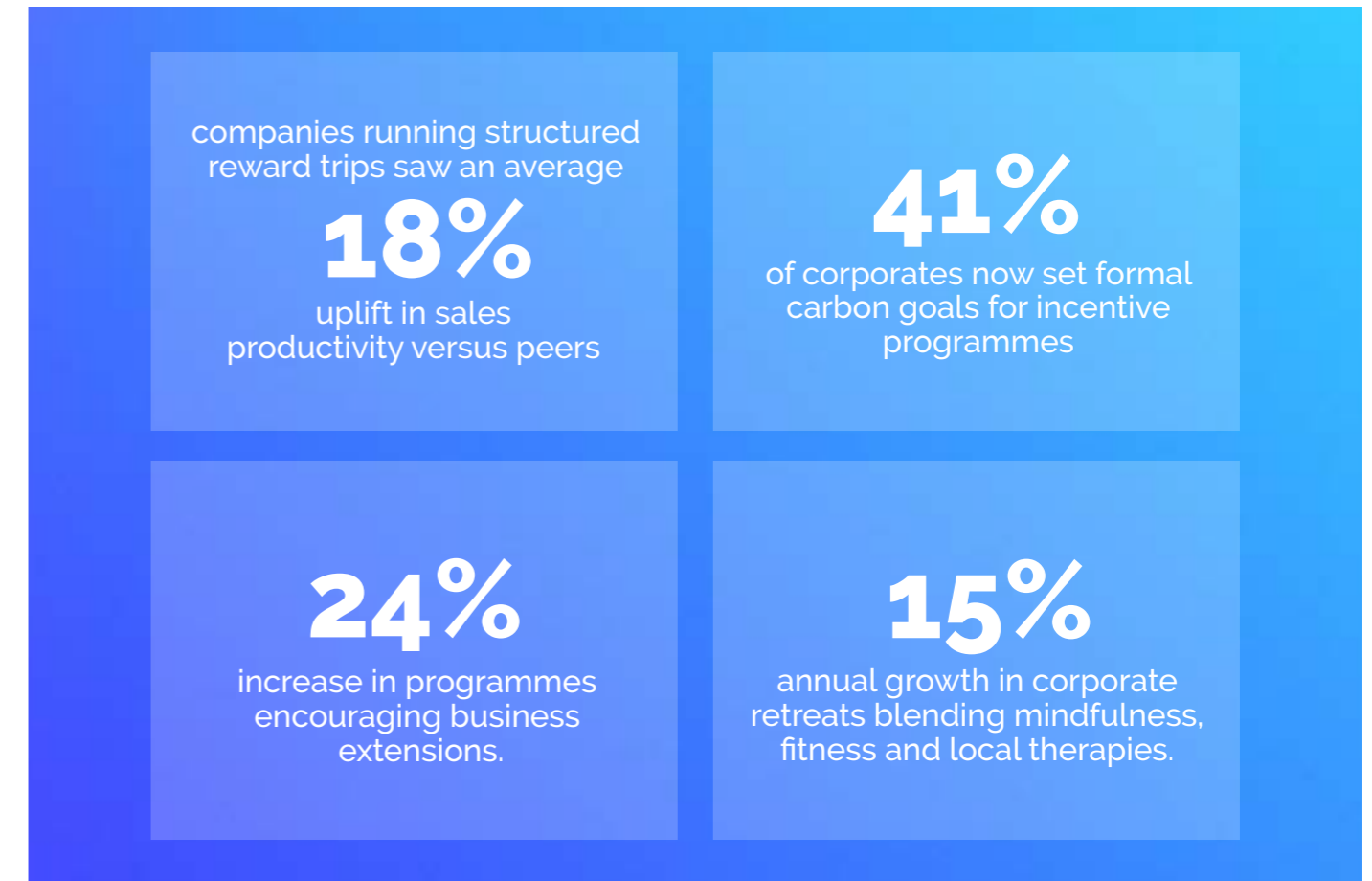
reports a 15% annual growth in corporate retreats blending mindfulness, fitness and local therapies. These themes align with employee wellbeing agendas and help justify budgets in ESG-conscious boardrooms.

Headwinds: Costs, Geopolitics and Talent

Despite what can only be seen as a positive outlook for this sector, there are some more cautionary trends, with cost inflation looming largest. SITE's 2025 survey found 92% of planners concerned about airfares and venue rates, with many negotiating creative sponsorships or tiered reward structures to maintain quality.

At the same time, political uncertainty adds a layer of risk management and the potential of unwanted red tape and administration costs.

This is a sector that represents this industry in its entirety. It requires people and goods to move freely and unencumbered in safe, secure and enriching ways, free to discover and nourish the places and people they visit.



Sources

- Society for Incentive Travel Excellence / IRF / FICP, Incentive Travel Index 2025
- Incentive Research Foundation, Pulse Survey 2025
- CNBC, "Corporate incentive travel demand remains strong," Jan 2025
- GBTA, Business Travel & Meetings Outlook 2025
- Destination Canada, MICE Outlook 2025
- Virtuoso, Luxury Travel Report 2025
- Africa Travel Week, "Sustainable safaris for incentives," Mar 2025
- MPI, Meetings Outlook 2025
- Global Wellness Institute, Corporate Wellness Retreats 2025
- Bizzabo, Global Event Marketing Insights 2025, Mar 2025

M&A DEALS, DATA AND DESTINY

Ignite the Industry Through Investment

The events and brand experience sector has reached a pivotal point. For much of the past decade, agencies have thrived on creativity and instinct, but as Max Fellows, Founder of allpoints, observes, "What once worked no longer does."

According to Fellows, the post-pandemic rebound brought a rush of optimism but also disguised deeper structural challenges. "As the market stabilises, the realities are clear," he explains. "Growth is slowing, competition has intensified, and clients are buying differently."

Working alongside agency founders, boards, and investors across the UK and Europe, Fellows and the allpoints team see both the pressures and opportunities emerging. However, he is quick to underline that the industry isn't in decline "... It's evolving, and those who recognise that early will shape what comes next." In this new section of the IBTM Trends Report, combined with a new activation within the show itself, and drawing on market data and M&A activity across the UK creative and live communications industries, Fellows outlines the forces redefining the agency landscape.

FF
It's evolving, and those who recognise that early will shape what comes next. — Max Fellows, Founder of allpoints
JJ

The Experience Agency Crossroads

More than 25,000 agencies now operate in the UK alone, across live events, brand experience and communications. Yet sector growth has slowed to 6–8% annually, compared with 30–40% a decade ago. "Nearly 90% of agencies have reported revenue losses in the past year," Fellows notes, "and day rates continue to be squeezed as clients consolidate spend with fewer, larger suppliers."

For independent agencies, this is a defining moment. Around 74% turn over less than £2 million, while more than half run on margins of 21–25%. "Buyers (of event agencies) now place greater value on scale, reliability and measurable impact," he says. "Pricing models are shifting toward profit-share and performance-based models." The agencies that thrive, he adds, will "... combine strong ideas with operational discipline, data-driven insight and leadership depth."

The Power of Brand, Reputation and Relationships

At the same time, in an increasingly tough new business environment, brand strength becomes the most powerful growth driver. Over half of agencies (52%) say PR and social media now deliver their most effective leads, while cold calling accounts for less than 15%.

"Clients buy credibility and confidence," Fellows says. "A visible, consistent brand presence, backed by leadership commentary, builds recognition and trust before a brief even lands." He believes agency leaders who invest in their own profile "attract better-fit opportunities and command higher perceived value." However, he warns that existing clients remain underused.



The Great Succession

Meanwhile, a wave of ownership transition is reshaping the sector, according to allpoints data, 43% of agencies were founded in the early 2000s. Now, as Fellows says, "Many founders who built their agencies in the early 2000s and 2010s are considering their next move; selling, taking investment or planning for internal succession," Fellows says.

This generational shift is opening opportunities for new leadership and investment. "Founders can now monetise legacy," he notes, "while strategic buyers are seeking well-run agencies that complement their existing offer."

Employee Ownership Trusts (EOTs) have become a credible route for gradual exit while maintaining culture, though Fellows cautions that, "leadership gaps and fragmented client books remain deal-breakers." He points out that, "... less than 0.5% of businesses achieve a successful sale, and of those, 73% fail to achieve their full earn-out. Building a saleable business takes planning, transparency and time."

M&A and Market Momentum

However, one of the key trends, also reflected in the wider positive tone around the meetings and events industry is that, despite economic uncertainty, M&A appetite within the creative and live communications industries remains steady. "The nature of deals has changed," Fellows explains. "Buyers are now focused on precision and purpose rather than roll-ups and volume."

They are targeting agencies with clear positioning, proven leadership and scalable delivery models. "It's about complementarity, not just scale; adding capabilities or specialisms that strengthen a group," he says.

Private equity interest is also on the rise in this space says Fellows, "Investors want sustainable profitability, recurring income and defensible market positions," he adds. "Agencies with consistent net margins above 15% and a healthy balance of retained and project work are commanding the most attention."

FF
A visible, consistent brand presence, backed by leadership commentary, builds recognition and trust before a brief even land
JJ

Current valuations range between three and seven times EBITDA, depending on performance and positioning. Smaller strategic mergers, Fellows notes, "are also showing stronger results, alignment in purpose, service, and values matters more than scale."

The Highest-Growth Sectors

At the same time, several industries are outperforming, allpoints' analysis highlights five leading categories for 2026:

- Technology and Software: 11–15% growth, driven by SaaS and digital transformation.
- FMCG and Consumer Goods: 15–20%, with renewed investment in experiential marketing.
- Media and Entertainment: 12–16%, fuelled by streaming competition and branded content.
- Sustainability and Energy Transition: 10–14%, as brands communicate innovation and impact.
- Financial and Professional Services: 8–12%, led by fintech and B2B repositioning.

"These sectors align with investor priorities," Fellows explains. "Agencies with specialist expertise in these markets are achieving premium valuations."

Technology, Data and the Changing Agency Model

Unsurprisingly, technology is also transforming agency operations and value creation. Yet, as Fellows points out, "Only one in five agencies has a defined AI or technology strategy; more than half are still exploring how best to implement it."

Those investing early are already seeing benefits, "Automation, data-led strategy and workflow optimisation are saving time, improving accuracy and creating new commercial models," he says. "Some are even developing proprietary tools that provide measurable client value."

For Fellows, this marks a new era: "The next generation of agencies won't just deliver ideas and experiences, they'll own the intelligence and tools that power them."

Lead, Don't Follow

Despite the challenges, Fellows remains optimistic. "The future will favour clarity over complexity and precision over scale," he concludes. "Growth won't come from being the biggest; it will come from being the most trusted and relevant. Agencies that modernise, embrace technology and invest in leadership will set the pace. Those clinging to old models will fall behind."

"The next chapter of our industry," he adds, "will be written by those with the confidence to change, to innovate and to lead."

More than
25,000
 agencies now operate in the UK alone, across live events, brand experience and communications.

Over half of
agencies (52%)
 say PR and social media now deliver their most effective leads

High-Growth Sectors for 2026

Technology & Software:
11–15%

FMCG & Consumer Goods:
15–20%

Media & Entertainment:
12–16%

Sustainability & Energy Transition:
10–14%

Financial & Professional Services:
8–12%

EXPERIENCE TRENDS



INTRODUCTION

Spinning the Globe

Historians sometimes use the phrase 'spin the globe' as a reminder that events in one place can only be fully understood by seeing what is happening elsewhere. This is the principle behind our exploration of regional trends; what happens in one geography shapes and is shaped by dynamics across the world.

In the events industry, we often talk about fragmentation, be it of audiences, of formats, of expectations. The same is true of the global economy, where regional relationships are increasingly pulling apart, even as they remain deeply interconnected. By looking at Europe, North America, Latin America, Africa, the Middle East and Asia Pacific, both individually and in context, we can spot not just differences, but the common threads that bind them together.

As in previous years, we will be staggering the launches of these regional chapters to align with major trade shows and milestones. This year's schedule includes:

- **Europe: IBTM World (this report)**
- **North America: IBTM World (this report)**
- **Africa: IBTM Africa (April 26)**
- **Middle East: ATM (May 26)**
- **Asia Pacific: ILTM Asia Pacific (July 2026)**
- **Latin America: IBTM Americas (August 2026)**

This cadence promises fresher data, deeper analysis and an unfolding narrative throughout the year, rather than a single snapshot in November at IBTM World.

We begin here with Europe and North America; two regions whose dynamics set the tone for much of the global industry. Together they highlight some of the defining questions for 2026: the strength of relationships, the value of partnerships and the weight of responsibility in shaping a more connected future.

EUROPE

Rising to the Challenge?

Within the last two editions of this report, Europe has been typified as somewhat of a "perennial underperformer" in terms of economics and politics. Slow growth, internal fragmentation and external crises often cast the region as reactive rather than proactive. Meanwhile in contrast, its impacts on wider marketplaces are vast; the world needs Europe to do better.

It's pleasing therefore to be able to tell a new story of Europe in 2025, a continent showing signs of renewed responsibility and strategic clarity. From trade diversification beyond the United States to its leadership on tech regulation and its support for Ukraine, the continent is increasingly positioning itself not as a fragile bloc, but as an active shaper of global policy.

Economic Context: Recovery With Caveats

The European economy remains subdued compared with the United States, but it is far from stagnant. According to the Financial Times, the eurozone grew by just 0.8% in 2024, while the United States expanded by 2.5%. However, forecasters now expect further recovery in 2026 as energy shocks fade, inflation stabilises and consumer confidence returns in key markets.

Germany, still the region's industrial engine, has struggled with weak manufacturing demand, though green technology and automotive electrification provide medium-term opportunities. According to The Economist, France, meanwhile, continues to rely on aerospace, luxury goods and defence exports, giving it a more diversified profile.

Equally, Southern Europe is performing better than expected, buoyed by tourism and investment in renewables. A report from Reuters quotes Spain now as a leading hub for green hydrogen projects, while Eastern European countries like Poland and the Czech Republic remain attractive for nearshoring, benefiting from supply chain relocations away from China.



The US Relationship: Strains and Rebalancing

Europe's relationship with the United States remains strategically vital, but also fraught. Trade continues to be significant: bilateral goods and services exchanges exceeded €1.2 trillion in 2024, says the European Commission. Yet President Donald Trump's return to the White House has re-introduced volatility. His tariff policies, particularly threats on European car exports, have unsettled German manufacturers and his administration's increasingly anti-Europe rhetoric can only be seen as destabilising.

This relationship is important to meetings and events professionals, packed into it is a vast amount of soft power. Cross border events, globalised event companies and the movement of talent between continents is all made easier and better because of strong relationships, and they need to endure.

Politically, rather than passively absorbing shocks, the EU is hedging. New trade agreements with Mercosur and advanced talks with India and ASEAN states underline a

desire to diversify. Investment ties with the Gulf are also deepening, particularly in green energy and technology. This move suggests Europe is seeking resilience by balancing transatlantic dependency with a wider global footprint, but also further demonstrating its growing responsibility and dynamism.

Ukraine and Security Responsibility

Perhaps the clearest marker of Europe's changing role is its commitment to Ukraine. With the Trump administration signalling reduced United States support, the EU has stepped in. In early 2025, Brussels approved a €50 billion multi-year aid package for Kyiv, covering military, reconstruction and energy security needs. NATO's European members are also increasing defence spending, with Germany surpassing the 2% of GDP threshold for the first time.

For meetings and events professionals, Ukraine's plight is not abstract; it has reshaped travel patterns, heightened security requirements for large gatherings and reframed Europe's international positioning. By assuming greater responsibility, Europe signals to global organisers it is serious about stability and resilience.

Regulation as Competitive Advantage

Moving into other essential industries, if Europe once lagged in shaping global digital markets, it is now at the forefront. The EU's Digital Services Act (DSA) and Digital Markets Act (DMA) came into effect in 2024, targeting platform accountability and market fairness. In 2025, Brussels moved further with the world's first comprehensive AI Act (see section above on AI), regulating high-risk applications and requiring transparency in generative AI systems.

Critics argue these measures could burden innovators, but supporters see them as long-term competitive advantages.



By setting global standards, Europe positions itself as the world's regulatory benchmark. For the meetings industry, this means both compliance obligations and opportunities: tech events and congresses increasingly look to Europe as the natural home for debates on governance, ethics and digital transformation.

The Threat of Populism

Despite this newfound responsibility, Europe's cohesion is far from guaranteed. Populist and far-right parties are gaining ground. In June 2024's European Parliament elections, nationalist blocs won nearly a quarter of seats, challenging Brussels' ability to act decisively, says The Guardian. From Marine Le Pen's growing influence in France to the AfD in Germany and Giorgia Meloni's consolidation in Italy, the political pendulum is swinging. These movements often oppose climate measures, EU expansion and liberal migration policies, all critical for the region's strategic direction. This undercurrent creates uncertainty for international event planners who must weigh reputational risks and local sentiment when choosing destinations. Yet paradoxically, it also reaffirms the central role of Europe as a stage where competing visions of democracy, identity and openness play out. This too is important, it's an area this report is increasingly concerned with; opinions and strategies do differ and this requires managed, inclusive and intelligent conversation. Where better for this to take place than in live events?

Britain and the 'Wider Europe'

Finally, another new factor is Britain's return to the table. Despite being outside the EU, the UK's more centrist government has eased relations with Brussels and opened doors for collaboration on trade, security and science.

Meanwhile, other non-EU countries like Norway, Turkey and Switzerland are likewise becoming part of a more flexible, layered 'wider Europe'. For event organisers, this expands options: destinations such as Istanbul or Oslo can serve as alternative gateways that combine European access with distinctive cultural appeal. Europe is getting bigger and at the same time looking to strengthen geographic ties.

Populist and far-right parties are gaining ground, challenging Brussels' ability to act decisively.

Meetings and Events: A New Landing Spot

For the global meetings and events industry, Europe is increasingly attractive. United States associations and corporations, wary of insularity and visa restrictions at home, are moving flagship events to European cities. Examples include major medical congresses shifting to Paris, Barcelona and Vienna in 2025, as quoted in Conference & Meetings World earlier this year.

This reflects not only Europe's infrastructure and expertise, but also its symbolic position as a globally accessible host. Economic constraints remain, budgets are tight, inflation persists, and organisers face short lead times. But sustainability, wellness and inclusivity continue to define European meetings. The continent's regulatory leadership and its role in cultural diplomacy make it a compelling place for events that want to combine local excellence with global relevance.

Conclusion

Europe is no longer the forgotten giant of the events world. While threats remain, including populism, economic sluggishness and geopolitical pressures, the region's proactive stance on Ukraine, digital governance and trade diversification signals a new era of responsibility. For event strategists, this means opportunity: a continent once dismissed as slow and fragmented is re-emerging as both a global standard-setter and a natural landing spot for international events.

Sources

- Financial Times, Eurozone recovery and trade pivots, Jan–Feb 2025
- The Economist, Europe's growth lag behind US, Feb 2025
- Reuters, Spain's hydrogen hub ambitions, Mar 2025
- Euractiv, Nearshoring in Central Europe & EU AI Act, Jan 2025
- Politico Europe, Trump tariffs and EU response, Jan 2025
- BBC, EU €50bn Ukraine aid package, Jan 2025
- DW, Germany's defence spending milestone, Feb 2025
- The Guardian, European populist surge in EP elections, Jun 2024
- Conference & Meetings World, US associations shift events to Europe, Jan 2025
- Financial Times, UK's centrist pivot and EU rapprochement, Dec 2024



NORTH AMERICA

Power and Partnership in a Changing World

North America remains one of the most influential regions in global politics, economics and culture. Its meetings and events industry mirrors this position; sophisticated, innovative and arguably the global leader in scale and expertise. Yet the region is navigating a period of tension: the United States is now both indispensable and unpredictable, allies like Canada and Mexico are adjusting to US-first trade and tariff policies and international delegates weigh the appeal of the country against its political volatility. There has never been a more fascinating yet urgent need to look at North America.

Economic Context: Growth with Friction

The United States remains the world's largest economy, expanding by 2.5% in 2025, outpacing Europe and Japan but behind parts of Asia. According to research from Reuters, Canada grew by a modest 1.2% in 2024 as high interest rates and weak exports dampened performance. Mexico, meanwhile, benefitted from nearshoring and a manufacturing boom, with GDP growth at 2.7%, says the World Bank.

The United States-Mexico-Canada Agreement (USMCA) continues to underpin trade, with intra-regional flows surpassing \$1.6 trillion in 2024 (USTR, 2025). Automotive supply chains remain the backbone: United States design, Canadian parts and Mexican assembly form a highly integrated production system that represents this region at its best in terms of relationships. However, a report from Portico says tariff threats under the Trump administration have cast uncertainty, particularly over electric vehicles and steel imports, pressuring Canadian and Mexican exporters.

Beyond the continent, the US-China trade relationship remains fraught. Washington's tariffs on Chinese technology and green energy products have pushed companies to diversify, sourcing toward Southeast Asia and Latin America. Canada, with strong EU and Asia-Pacific agreements such as CETA and CPTPP, positions itself as a bridge between markets. Mexico, meanwhile, leverages nearshoring demand as global firms shift production closer to United States consumers.



EE

The United States remains the world's largest economy, expanding by 2.5% in 2025, outpacing Europe and Japan but behind parts of Asia.

Hard and Soft Power: Reliability Under Question

North America's hard power is unmatched, with United States defence spending rising again in 2025 and with one of the most impressive global economies in a generation. Its ability to rebound quickly, grow and accelerate is unmatched in major economies and in that performance lies strength. Yet reliability as a partner is questioned. President Trump's transactional diplomacy, tariff threats on allies and withdrawal of Ukraine support have unsettled Europe and Canada alike. For meetings professionals, these dynamics matter: the perception of United States unpredictability shapes whether global associations feel comfortable hosting flagship events there and brand perception and alignment are questioned in the face of tactics seen either as aggressive or cruel.

However, soft power remains a major asset. The United States is one of the world's great cultural hubs and innovation centres, from Hollywood to Silicon Valley. Canada amplifies this with its reputation for openness, diversity and safety, consistently ranking as one of the most welcoming destinations for international visitors, according to a 2025 report by UNWTO. Together, this blend of creativity, openness and innovation sustains global appeal despite political headwinds.

Tourism and Delegates: A Mixed Picture

One of the areas of discussion is how this new and changing perception of North America and the United States specifically affects travel to and from the region. Statistics show it is not as bad as some commentators fear. Inbound travel to the United States rebounded strongly in 2024, with international arrivals up 24% year-on-year. Visa delays and political uncertainty remain barriers for international delegates, particularly from emerging markets, however this too is still to be proved in the data. Canada, by contrast, recorded record international arrivals in 2024, with strong growth from Europe and Asia. For event strategists, this is significant when weighing up destination choice. Associations seeking higher global attendance often find Canada a more accessible choice.

Meetings and Events: Scale, Innovation and Constraints

The United States remains the world's largest meetings market. ICCA's 2024 rankings place the country first globally, hosting 690 international association meetings. Canada followed strongly with 259, while Mexico secured a rising share, particularly in Mexico City and Cancun.

Moreover, according to BCD Meetings & Events' 2025 trends report, North America saw event volumes rise by 15% year-on-year, with in-person meetings comprising 88% of the market. Budgets remain pressured by inflation, with hotel and F&B costs driving shorter lead times and smaller formats. Corporate clients increasingly demand experience design and strategic consultation, shifting from logistics to holistic event strategy. Again, this is important and underlines the sophistication of this market and its desire to keep innovating and leading event industry ambitions.



EE

Corporate clients increasingly demand experience design and strategic consultation, shifting from logistics to holistic event strategy

Balancing Opportunity and Challenge

For event professionals, the region embodies paradox. The United States is essential; its infrastructure, innovation and global clout make it irreplaceable. Yet political unpredictability, trade frictions and visa barriers temper enthusiasm. Canada, Mexico and other parts of central and Latin America offer alternatives: reliable, welcoming and increasingly global in their positioning.

For the global events industry, North America is not just a market but a stage where the world's economic and political tensions play out. Delegates want to meet here because the stakes are high, the conversations matter and the innovation ecosystem is unmatched. At the same time, organisers must navigate costs, perception and politics carefully.

Conclusion

A strong North America is critical to the global meetings industry. The United States and Canada remain deeply interconnected economically, yet politically they diverge in approach. The opportunity lies in balancing these dynamics; leveraging the continent's hard and soft power while ensuring international delegates feel welcomed, valued and part of the conversation.

Sources

- Financial Times, "US vs Europe growth outlook," Jan 2025
- Reuters, "Canada economy slows under high rates," Jan 2025
- World Bank, "Mexico growth outlook," Feb 2025
- USTR, "USMCA trade flows 2024," Jan 2025
- Politico, "Trump tariff threats unsettle Canada, Mexico," Feb 2025
- The Economist, "US-China trade realignment," Feb 2025
- BBC, "Trump signals reduced Ukraine support," Jan 2025
- UNWTO, "Global tourism recovery," Jan 2025
- Destination Canada, "Tourism outlook 2025," Feb 2025
- WTTC, "Mexico tourism recovery," Dec 2024
- ICCA, "2024 association meeting rankings," Dec 2024
- BCD Meetings & Events, "Trends 2025," Jan 2025

CONCLUSION

The words Artificial Intelligence (or AI) are used in this report just over 100 times. However, the word 'responsibility' is close behind. It is not always used in relation to AI either, but rather reflecting more positively on the industry's ability to both be responsible for others and to handle its own growing impacts on the world.

When this report launched in Barcelona last year, it carried the headline that half of humanity was about to vote in elections around the world – the biggest capturing of a global voice in history. The event industry's qualities of being clear, authentic and fair arbiters of speech, information and sharing was positioned as one of our key responsibilities under this global backdrop.

The industry's headwinds were everything from fake news to AI, political fragmentation, environmental disaster and the misery of war.

Not for a second would one want or be able to argue the meetings and events industry can solve global problems in isolation. But it can put people in the room that can. What can be said though, is that this is an industry that stepped up in 2025, that took its responsibilities seriously and has benefited from this approach.

Next year will be another tough year globally, of that there is no doubt. Many of the issues we faced this time last year we still face today. Under such circumstances it is perhaps rude and clumsy to talk about meetings and events growth as wholly good for the world. However, I believe it is not too much of an overstatement that its expansion, as a trusted medium of communication, is most certainly positive.

Under this context, it is important to remember that our growth is more than just financial, it is built on respect, appreciation and trust. It underlines that investment in face-to-face communication, with quality production, cultural awareness, artistic interest and creative endeavour creates lasting, transformative impact.

Next year will be a good news story for those in the meetings and events industry. Let us grasp this moment, continue to grow our influence as a responsible, impactful and valuable industry and lay the foundations for a positive future for all.

Thanks for reading.